

Appendix

City of Punta Gorda Comprehensive Plan 2045

Ordinance 2013-2024
February 7, 2024

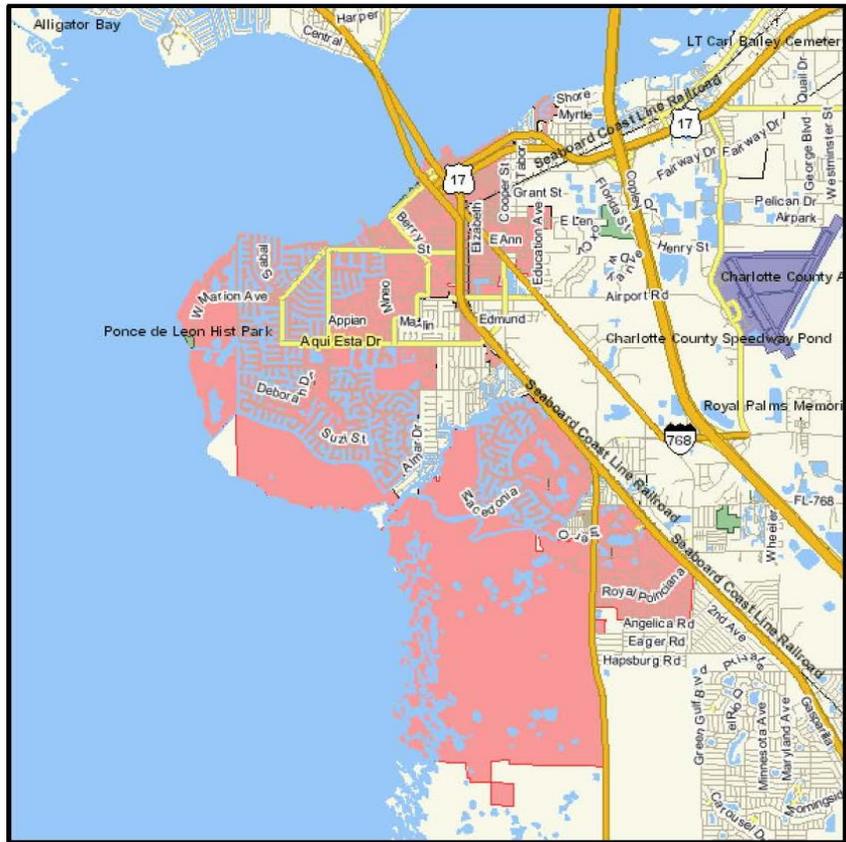
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**Appendix #1 - City of Punta Gorda Analysis of Impediments to Fair Housing Choice -
March, 2015 - Executive Summary & Complete Report**

CITY OF PUNTA GORDA ANALYSIS OF IMPEDIMENTS TO FAIR HOUSING CHOICE

March, 2015



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City of Punta Gorda
Analysis of Impediments to Fair Housing Choice

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**CITY OF PUNTA GORDA
ANALYSIS OF IMPEDIMENTS TO AFFORDABLE HOUSING CHOICE**

EXECUTIVE SUMMARY

BACKGROUND

As a recipient of federal funds through the Department of Housing and Urban Development (HUD), the City of Punta Gorda is required to conduct an analysis to determine if any impediments exist that might prevent the nation's fair housing laws from being observed. The City conducted an interim Analysis of Impediments in 2013.

The Civil Rights Act of 1968 and the Fair Housing Amendments Act of 1988 are the primary legislation directed toward ending discrimination in housing. These laws are designed to ensure that individuals of similar income levels in the same housing market have equal housing choices regardless of their race, color, religion, sex, handicap, familial status, or national origin. Over the succeeding years, other legislation has been enacted which addresses specific needs of target populations.

PURPOSE

The purpose of this analysis is to examine a number of key policy areas to ensure that a pattern of housing discrimination does not exist; including any public policies that may contribute to impeding the provision of fair housing choice.

If the analysis finds any impediments, the City is required to take positive action to remove or address the impediments.

FAIR HOUSING PROGRAM

Punta Gorda has existing ordinances and regulations in place;

- Fair Housing Ordinance
- Anti-Displacement Act
- Punta Gorda Affordable Housing Incentives
- Discrimination Complaint Policy

DISPROPORTIONATE IMPACT ON HOUSING

- The percentage of Blacks below the Poverty Level is not disproportionate compared to the entire community
- The percentage of Blacks denied mortgages is not disproportionate compared to the entire community
- The percentage of Hispanics below the Poverty Level is slightly disproportionate compared to the entire community
- The percentage of Hispanics denied mortgages is slightly disproportionate compared to the entire community

HUD SANCTIONS

There are no HUD sanctions against Punta Gorda.

LAWSUITS

There are no fair housing lawsuits against Punta Gorda.

FAIR HOUSING COMPLAINTS

Four sources were examined to determine the number of discrimination cases in the City of Punta Gorda. These sources include;

- The City of Punta Gorda
- Charlotte County
- State of Florida Commission on Human Relations
- Rural Legal Aid of Florida

Discussions with representatives of the City of Punta Gorda, Charlotte County and Legal Aid have revealed that no housing complaints have been received over the past five years. No records exist for any complaints prior to that time.

The Florida Commission on Human Relations does have records of housing complaints. However, this data is for the entire County and they could not provide a breakdown by location. The record of housing complaints indicates that only one case has proceeded to action by the Commission. The primary causes of housing complaints are from the disabled population.

FAIR HOUSING COMPLAINTS IN CHARLOTTE COUNTY

Filing Date	Charge Description	Closure Date	Closure Code	Basis Description
1/7/2010	Housing	3/2/2010	Successful Conciliation	Disability Mental
5/6/2010	Housing	6/6/2010	No Cause	Disability Physical
12/27/2011	Housing	3/1/2012	Withdrawal with Benefits	Disability Physical
1/9/2012	Housing	5/16/2012	Reasonable Cause	Disability Mental
1/6/2012	Housing	7/17/2012	No Cause	Disability Physical
5/6/2013	Housing	10/2/2013	Successful Conciliation	Sex, male
3/18/2013	Housing	1/9/2014	No Cause	Race, Black and National Origin
1/22/2014	Housing	3/25/2014	Withdrawal with Benefits	Disability Physical, Mental

Source: Florida Commission on Human Relations

PUBLIC INPUT

A Public Meeting was held at the Cooper Street Recreation Center on September 18, 2014 and approximately 35 people attended. All comments from the public were addressed in this report.

PUBLIC POLICY

A detailed examination of the Comprehensive Plan and the Land Development Codes were undertaken and the City has addressed any potential concerns regarding the ability to provide Affordable Housing.

NEWSPAPERS

Newspapers are one of the direct sources of information and contact regarding the dissemination of Fair Housing regulations to the general public. HUD has produced a Fair Housing disclaimer that is designed to be published in newspapers that publish Real Estate ads in any local community. This disclaimer is usually printed in the Real Estate section or found on-line at the newspaper's website. Most newspapers only publish the disclaimer in the Sunday Real Estate section since it typically has the largest amount of ads.

The Punta Gorda Herald-Tribune and the Charlotte Sun are the primary local newspapers in the area. In addition, the Sarasota Sun also serves the community.

After checking the websites for these entities, it was discovered that the HUD disclaimer is not contained on the site, in either the Real Estate section or in any other area.

BOARD OF REALTORS

Many of the individual Real estate firms in the Punta Gorda area provide the HUD disclaimer on their websites. They also are very prudent about distribution of the printed material regarding the subject.

The Port Charlotte, Punta Gorda, North Port Association of Realtors also provides access to the HUD Fair Housing materials on their website. All brochures, posters and printed documents are available for download in multiple languages. However, the Board does not offer classes to members regarding Fair Housing nor does it engage in any community outreach. The national Board of Realtors has extensive materials and programs available to its member organizations. These programs can be readily adapted for use in Punta Gorda.

APARTMENT ASSOCIATION

The Southwest Florida Apartment Association has classes to educate their membership regarding Fair Housing. These classes are taught by professionals in the field and offer information regarding the rights of tenants and prospective tenants.

IDENTIFICATION OF IMPEDIMENTS

Impediments identified are:

1. The City has adopted a formalized policy on the receipt of fair housing inquiries or complaints and this policy is published on the City's webpage. The information is complete, however anyone seeking this material would need to know where to search for the policy and contact telephone number.
2. Transportation and access to public transit was found to be an impediment to finding housing.
3. During investigation of the locally published newspapers, with advertising for real estate for sale or rent, no HUD disclaimer could be found
4. Lack of affordable housing units, based on community opinion.
5. The local realtors, while publishing HUD Fair Housing information on their website, do not hold classes for their members regarding Fair Housing and do not have an outreach program in the community to educate the residents.
6. There appears to be a lack of community knowledge of HUD Fair Housing initiatives and policy.

RECOMMENDATIONS FOR CORRECTION OF THE IMPEDIMENTS

1. Add a link on the City's website main page or in the Questions section to direct anyone seeking to file a housing discrimination complaint to the proper information.
2. In regards to transportation, there appears to be a need for education, outreach and publication regarding the currently available ride/transportation programs. The public does not appear to be fully aware of transportation programs that could assist the transportation disadvantaged-low income population. Additional dissemination of this information should be undertaken.
3. The City should request that the local newspapers insure that the HUD disclaimer regarding Fair Housing is published on their website and/or in print.
4. The City has made strides towards the inventory of affordable housing stock, by changes in their codes and ordinances and encouragement of economic development incentives. The City needs to continue on this path.
5. A partnership with the local Board of Realtors could be explored regarding the community education of the target population. This program should be initiated in the Elementary Schools and possibly expanded to additional grades. Use of existing materials will enable this program to be developed expeditiously.
6. Expand the distribution of Fair Housing materials throughout the community through the following.
 - a. The posting of HUD posters at after school care sites, parks and recreation centers, public housing sites, local houses of faith and schools
 - b. Having HUD/City of Punta Gorda Fair Housing pamphlets/written handouts available at various publically accessed sites, such as libraries, City Hall, other government building and centers.
 - c. Make sure the City website has the information available to the public

SECTION 1 INTRODUCTION

1.1 - BACKGROUND

As a recipient of federal funds through the Department of Housing and Urban Development (HUD), the City of Punta Gorda is required to conduct an analysis to determine if any impediments exist that might prevent the nation's fair housing laws from being observed. The City conducted an interim Analysis of Impediments in 2013.

The Civil Rights Act of 1968 and the Fair Housing Amendments Act of 1988 are the primary legislation directed toward ending discrimination in housing. These laws are designed to ensure that individuals of similar income levels in the same housing market have equal housing choices regardless of their race, color, religion, sex, handicap, familial status, or national origin. Over the succeeding years, other legislation has been enacted which addresses specific needs of target populations.

1.2 - PURPOSE

The purpose of this analysis is to examine a number of key policy areas to ensure that a pattern of housing discrimination does not exist; including any public policies that may contribute to impeding the provision of fair housing choice.

If the analysis finds any impediments, the City is required to take positive action to remove or address the impediments.

1.3 - STATE FAIR HOUSING LAW

Part II of Chapter 760 of the Florida Statutes outlines the State's Fair Housing Act. This Act follows federal law and makes it unlawful to discriminate against any person in any aspect of the rental or sale of housing. This Act created a 12-member Commission on Human Relations and is staffed by the Department of Management Services. The Act established a written complaint process with timelines for the Commission to investigate and resolve such complaints; first through voluntary compliance, and then through civil and criminal sanctions.

1.4 - FAIR HOUSING ORDINANCE

The City of Punta Gorda has adopted a Fair Housing Ordinance that addresses the procedures to pursue any complaints.

“It is the policy of the City of Punta Gorda, Florida, in keeping with the laws of the United States of America and the spirit of the Constitution of the State of Florida, to promote through fair, orderly and lawful procedure the opportunity for each person so desiring to obtain housing of such person’s choice in this jurisdiction without regard to race, color, ancestry, national origin, religion, sex, marital status, familial status, handicap or age, and, to that end, to prohibit discrimination in housing by any person.”

Appendix A contains the full ordinance.

1.5 - ANTI-DISPLACEMENT POLICY

“The City of Punta Gorda will replace all occupied and vacant occupiable low/moderate income dwelling units demolished or converted to a use other than as low/moderate income housing as a direct result of activities assisted with CDBG funds, as required by Section 104(d) of the Housing and Community Development Act of 1974, as amended (the Act), and implementing regulations at 24 CFR 570.496a.”

“The City of Punta Gorda will provide relocation assistance, as described in 570.496a(b)(2), to each low/moderate income household displaced by the demolition of housing or by the conversion of a low/moderate income dwelling to another use as direct result of assisted activities.”

The full Anti-Displacement Policy is found in Appendix B.

1.6 - PUNTA GORDA AFFORDABLE HOUSING INCENTIVES

Chapter 11A of the Ordinances of the City of Punta Gorda provide for incentives for Affordable Housing in the City.

“This Chapter is intended to encourage the provision of new units of owner-occupied affordable housing within the City of Punta Gorda by providing for deferral of payment of City imposed fees on qualifying units of Affordable Housing and for Impact Fee Transfers that may be used in payment of City imposed impact fees for new units of Affordable Housing where the demand for capital facilities generated by previously existing development has been permanently reduced on another site. These programs are intended to further the affordable housing goals and objectives in the Housing Element of the City’s Comprehensive Plan.”

The full Chapter is found in Appendix C.

1.7 – DISCRIMINATION COMPLAINT POLICY

Punta Gorda has adopted a formal policy to address any potential complaints of discrimination in housing in the City. This policy follows the guidelines established in Federal Policy and also provides a direct telephone line for the public to use in the process.

The information is included on the City’s webpage. However, the item is somewhat difficult to locate. The process for obtaining the information is:

1. Use the tab for City Departments and click on the Growth Management Division
2. Click on the Urban Design Division and go to the Division Main Page
3. Click on “Federal and State Compliance Policies”

Although the information is complete, any person wishing to file a complaint would not be able to find the section easily. The webpage should be redone to add a link on the main page or in the Questions section to enable the public to locate the information more easily.

The existing policy is found in Appendix D.

**SECTION 2
COMMUNITY PROFILE**

2.1 - DEMOGRAPHICS

The demographic analysis of Punta Gorda concentrates on the magnitude and composition of the population. Specific attention is paid to trends between the 2000 and 2010 census, and demographic, economic, and housing snapshots from the 2008-2012 American Community Survey. Please note that the attached maps present data by census tract with an overlay of the City limits. For reference, Map 2.1, on page 6, provides a visual representation of Punta Gorda.

According to the 2010 Census estimates, the total population of Punta Gorda was 16,641, a 16.0 percent increase between 2000 and 2010. Table 2.1, below, shows the distribution by race and ethnicity in the City. The White population increased by 14.5 percent, but their percentage of the total decreased from 94.6 percent to 93.3 percent between 2000 and 2010. African-Americans increased by 99 persons, to 3.3 percent of total population in 2010. This constituted a 21.8 percent increase from 2000 to 2010. Punta Gorda experienced a 161.8 percent increase in the Hispanic population between 2000 and 2010. The large percentage increase is due to the small number of Hispanic residents (285). An increase of 461 residents generates a percentage increase of 161.8%.

The percentage of the total population for Hispanics increased from 2.0 percent in 2000 to 4.5 percent in 2010, a 2.5 percentage point increase. The higher percentage increase in some of the minority populations is due to the low base number that existed in 2000.

Other ethnic groups had significant percentage increases in population between 2000 and 2010. The American Indian and Eskimo ethnic group experienced a 41.7 percent during this time frame. The Asian and Pacific Islander population increased 66.4%, but numerically and as a percent of total population, these increases were actually much less significant. These figures in Table 2.1 are from the 2000 and 2010 decennial censuses.

**TABLE 2.1
TOTAL POPULATION BY RACE AND ETHNICITY FOR PUNTA GORDA**

Race	2000		2010		% Change 2000-2010
	#	%	#	%	
White	13,569	94.6%	15,533	93.3%	14.5%
African-American	454	3.2%	553	3.3%	21.8%
American Indian and Eskimo	24	0.2%	34	0.2%	41.7%
Asian or Pacific Islander	116	0.8%	193	1.2%	66.4%
Other race	181	1.3%	328	2.0%	81.2%
Total	14,344	100.0%	16,641	100.0%	16.0%
Hispanic (ethnicity)	285	2.0%	746	4.5%	161.8%

Source: US Census 2000 and 2010

The majority of the following tables in this section are from the 2008-2012 American Community Survey (ACS), a United States Census program that uses average figures from surveys over a 5 year span. The ACS is the common appropriate source since it provides more accuracy and finer detail than current Census since the ACS asks more refined questions. The 2008-2012 ACS numbers are used for most tables and all Maps in this section.

**TABLE 2.2
POPULATION BY RACE AND ETHNICITY FOR PUNTA GORDA**

Race	Number	Percent
White	15,359	92.1%
Black or African American	506	3.0%
Other	820	4.9%
Total	16,685	100.0%
Hispanic	814	4.9%

Source: 2008-2012 American Community Survey

The distribution of the population by Race or Ethnicity is represented in Map 2.2 (Percent Black/African American) and Map 2.3 (Percent Hispanic). The concentration of the minority population is found in the Northeast quadrant of the City, west of I-75.

As seen in Table 2.3, on the next page, the total population of Punta Gorda is 16,685, 51.2% of which are female. The table shows that 44.7% of the population is over the age of 65 and only 10.6 percent are under the age of 20. The American Community Survey, an extension of the United States Bureau of the Census was used for all of the population statistics.

**TABLE 2.3
AGE AND SEX POPULATION**

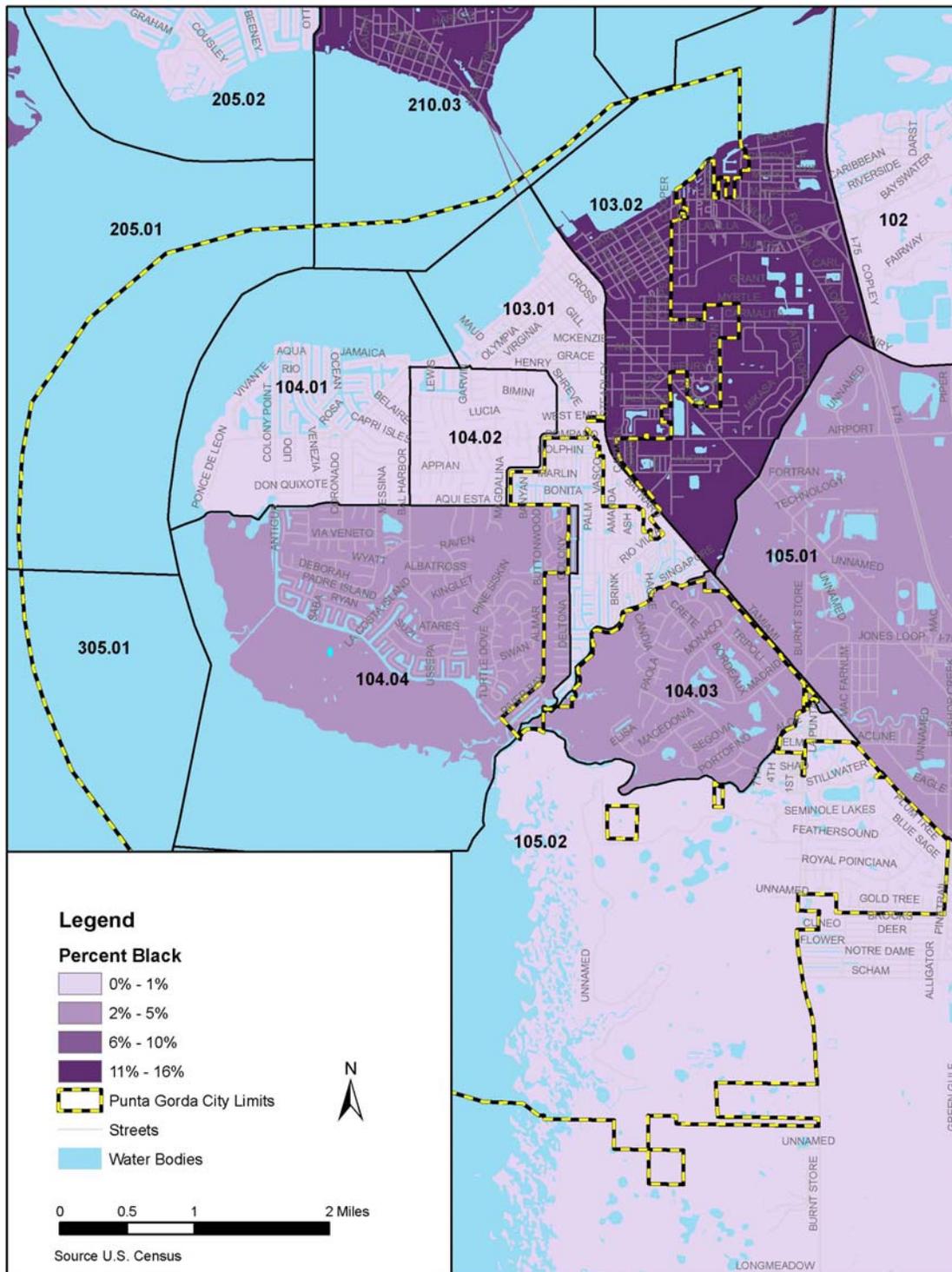
Sex and Age	Number	Percent
Total Population	16,685	100.0%
Male	8,150	48.8%
Female	8,535	51.2%
Under 5 years	309	1.9%
5 to 9 years	514	3.1%
10 to 14 years	438	2.6%
15 to 19 years	504	3.0%
20 to 24 years	294	1.8%
25 to 34 years	790	4.7%
35 to 44 years	1,201	7.2%
45 to 54 years	1,539	9.2%
55 to 59 years	1,395	8.4%
60 to 64 years	2,231	13.4%
65 to 74 years	4,168	25.0%
75 to 84 years	2,376	14.2%
85 years and over	926	5.5%

Source: 2008-2012 American Community Survey

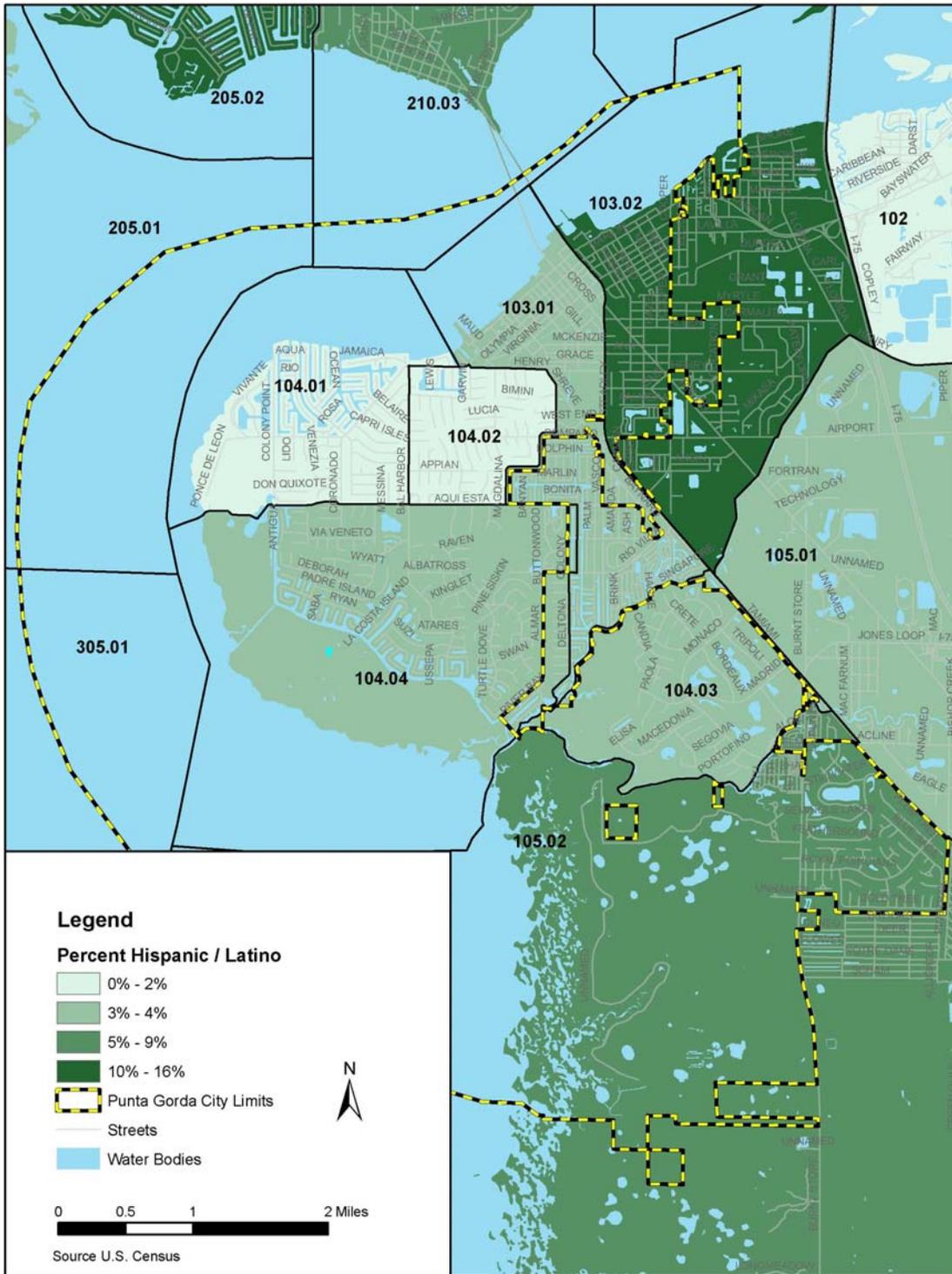
**MAP 2.1
CENSUS TRACTS AND CITY LIMITS**



**MAP 2.2
PERCENT BLACK/AFRICAN AMERICAN**



**MAP 2.3
PERCENT HISPANIC**



In many communities, female-headed households and female-headed households with children face a higher rate of housing discrimination. Higher percentages of female-headed households with children under the age of 18, sometimes correlates to increases in incidents of reported rental property owners’ refusal to rent to tenants with children. The percentage of female-headed households with children among White households was 6.3 percent, compared to 11.3 percent in Hispanic households, and 31.4 percent in African-American households between 2008 and 2012.

Non-family households among Whites made up 32.3 percent of all White households in Punta Gorda. Non-family households among Hispanics accounted for 27.5 percent of all Hispanic households. Non-family households among African-Americans accounted for 31.4 percent of all African-American households. Table 2.4, below, shows the household structure of the White, African-American, and Hispanic populations between 2008 and 2012.

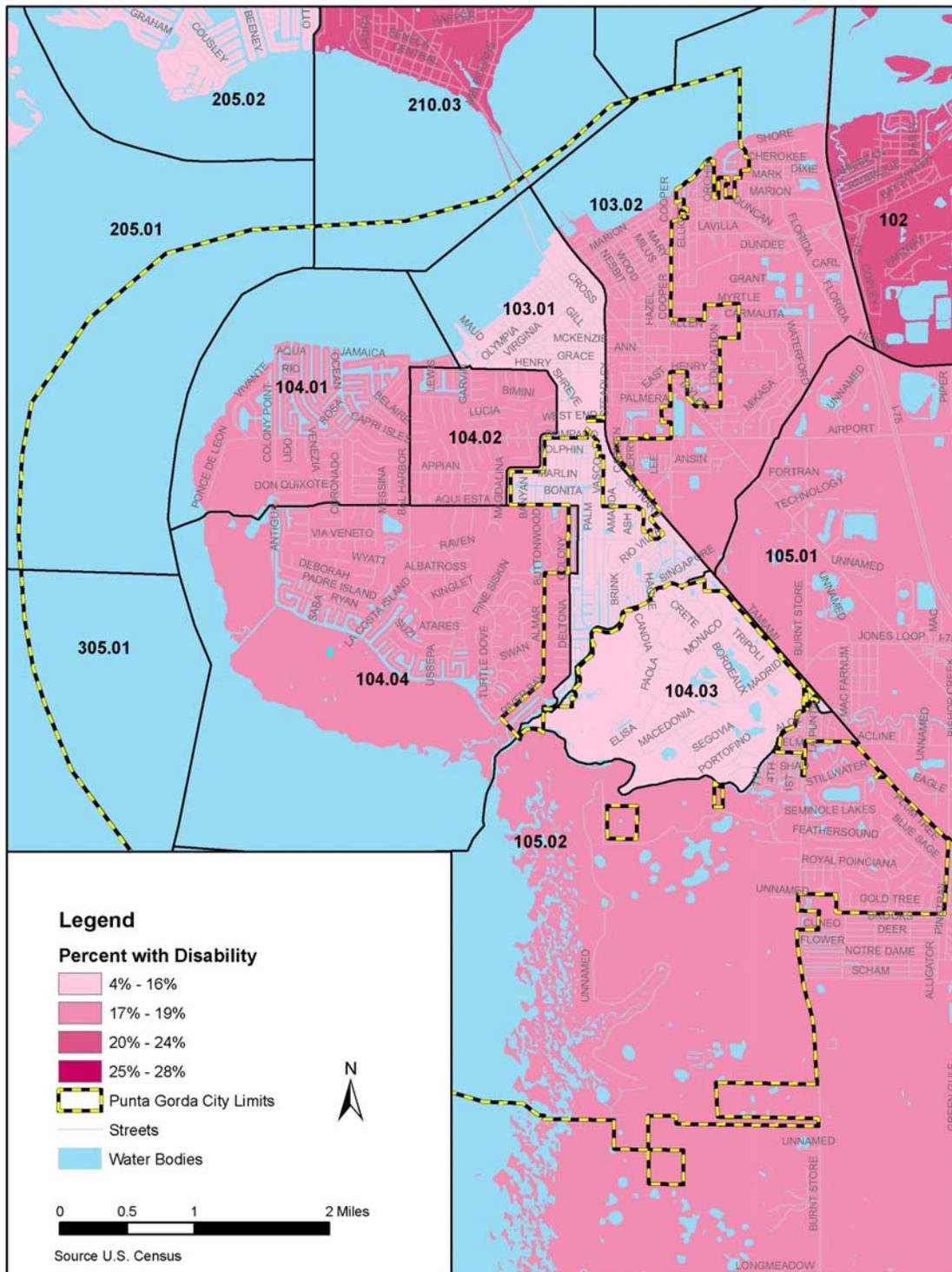
**TABLE 2.4
HOUSEHOLD TYPE BY RACE**

Household Type	White		Hispanic		African American	
	# of HHs	% of HHs	# of HHs	% of HHs	# of HHs	% of HHs
Family households:	5,230	67.7%	219	72.5%	129	68.6%
Married-couple family	4,698	60.8%	169	56.0%	20	10.6%
Male householder, no wife present	49	0.6%	16	5.3%	16	8.5%
Female householder, no husband present	483	6.3%	34	11.3%	93	49.5%
Nonfamily households:	2,495	32.3%	83	27.5%	59	31.4%
Total:	7,725	100.0%	302	100.0%	188	100.0%

Source: 2008-2012 American Community Survey

The Fair Housing Act requires housing providers to make reasonable accommodations for those with disabilities. In the City of Punta Gorda, 2,751, or 16.6 percent of the non-institutionalized population has a disability. The map (2.4) on the following page shows the spatial grouping of those with disabilities.

**MAP 2.4
PERCENT OF POPULATION WITH A DISABILITY**



In 2009, there were 5,106 elderly households (headed by a person 65 years of age or older) in Punta Gorda, or 58.5% of the total number of households in the City. This is in comparison to 27.8% throughout Florida. Of these households, 91.8 percent own their home and 8.2 percent rent. As seen in the following table, 22.2% of elderly households pay more than 30% of their income for rent or mortgage costs.

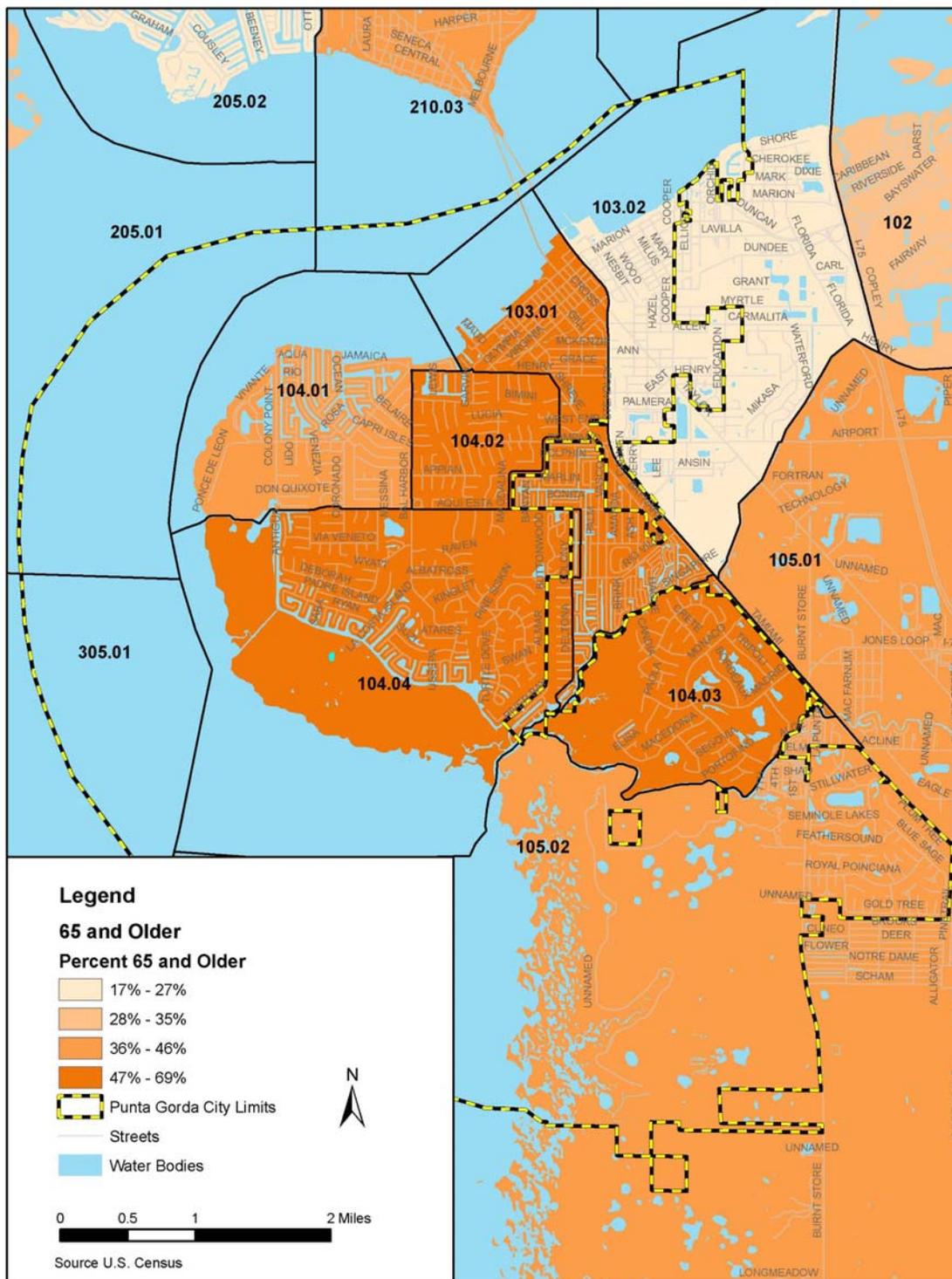
**TABLE 2.5
ELDERLY HOUSEHOLDS BY AGE AND COST BURDEN**

Age of Householder	Cost Burden					
	0-30%		30-49.9%		50+ %	
	Number	Percent	Number	Percent	Number	Percent
65+	3,972	77.8%	648	12.7%	486	9.5%

Source: Shimberg, 2009

On the following page, Map 2.5 shows where the concentration of the elderly population is located.

**MAP 2.5
POPULATION AGED 65 and OVER**



2.2 - INCOME

Low-income households tend to be housed in less desirable housing stock and in less desirable areas of the City. Income limitations often prevent those households from moving to areas where local amenities raise the value of the housing. Income plays a very important part in securing and maintaining housing.

The data in Table 2.6 shows the distribution of income among Whites, African Americans, and Hispanics. In general, limitations on fair housing choice are more commonly found to affect housing decisions among low-income persons.

The data reveals some differences in incomes among the three groups. Whites and African Americans earn roughly the same amount of money, as the median incomes for the two groups are well within the margin of error. Hispanics, on the other hand, have a median income less than half of the other two groups.

Race/Ethnic Group	Median Household Income
White	\$57,567
African American	\$58,102
Hispanic	\$26,563
Total Population	\$57,692

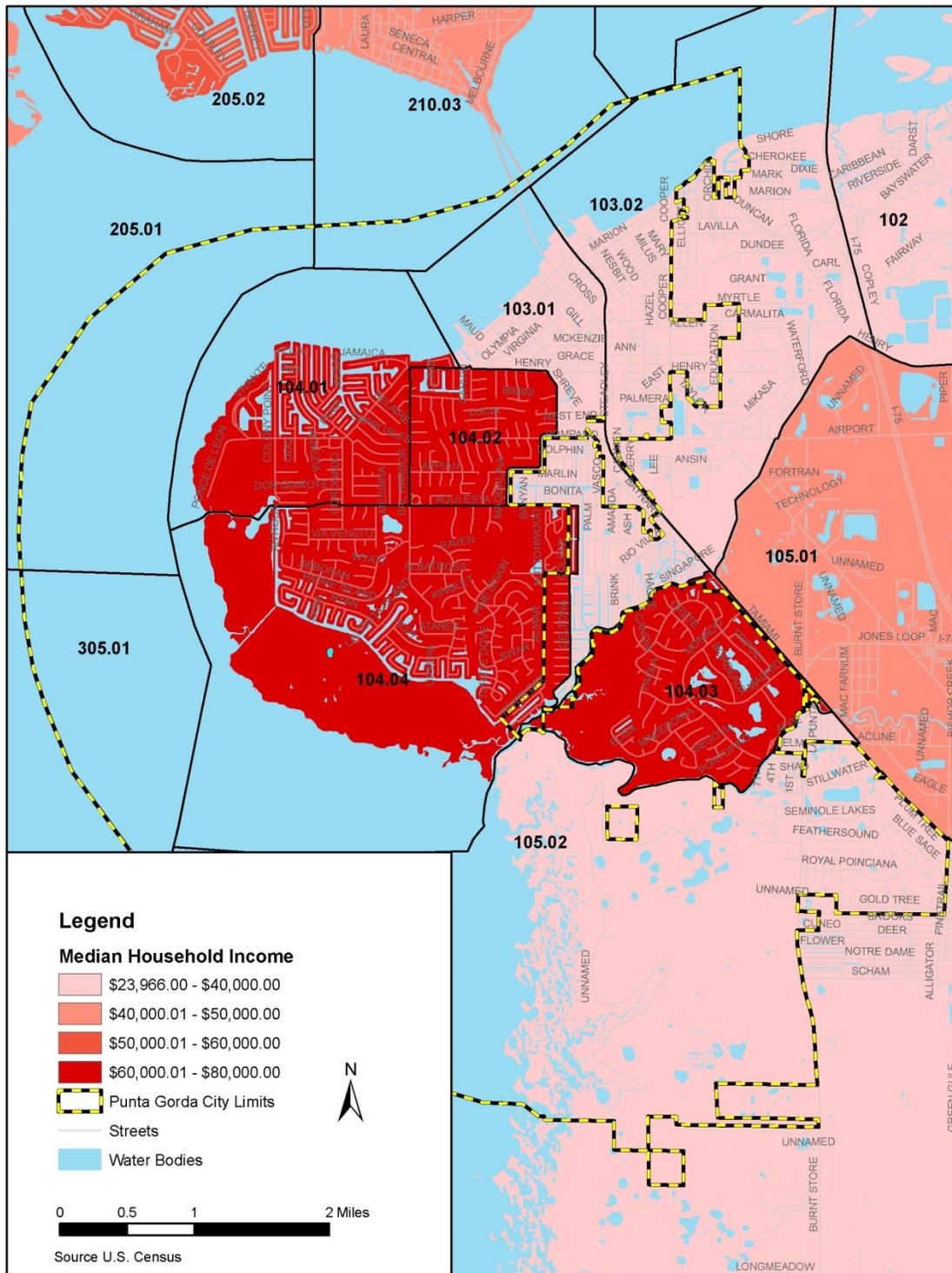
**TABLE 2.6
INCOME BY RACE**

Income Class	White		Hispanic		African American	
	# of Households	% of Households	# of Households	% of Households	# of Households	% of Households
Less than \$10,000	370	4.8%	31	10.3%	0	0.0%
\$10,000 to \$14,999	338	4.4%	0	0.0%	10	5.3%
\$15,000 to \$24,999	610	7.9%	65	21.5%	31	16.5%
\$25,000 to \$34,999	965	12.5%	112	37.1%	16	8.5%
\$35,000 to \$49,999	1,018	13.2%	0	0.0%	24	12.8%
\$50,000 to \$74,999	1,573	20.4%	0	0.0%	54	28.7%
\$75,000 to \$99,999	1,017	13.2%	40	13.2%	17	9.0%
\$100,000 or more	1,834	23.7%	54	17.9%	36	19.1%
Total	7,725	100.0%	302	100.0%	188	100.0%

Source: 2008-2012 American Community Survey, 2012 inflation adjusted dollars.

Map 2.6, on the following page, shows the median household income by census tract between 2008 and 2012.

**MAP 2.6
MEDIAN HOUSEHOLD INCOME**



The poverty data in Table 2.7, below, shows major disparate impacts of poverty among Hispanics compared to Whites and the City as a whole. Among White persons, the data reported 9.3 percent poverty rate between 2008 and 2012. About 38.1 percent of all Hispanics lived in poverty during the period. The poverty rate for African Americans is only 3.8 percent.

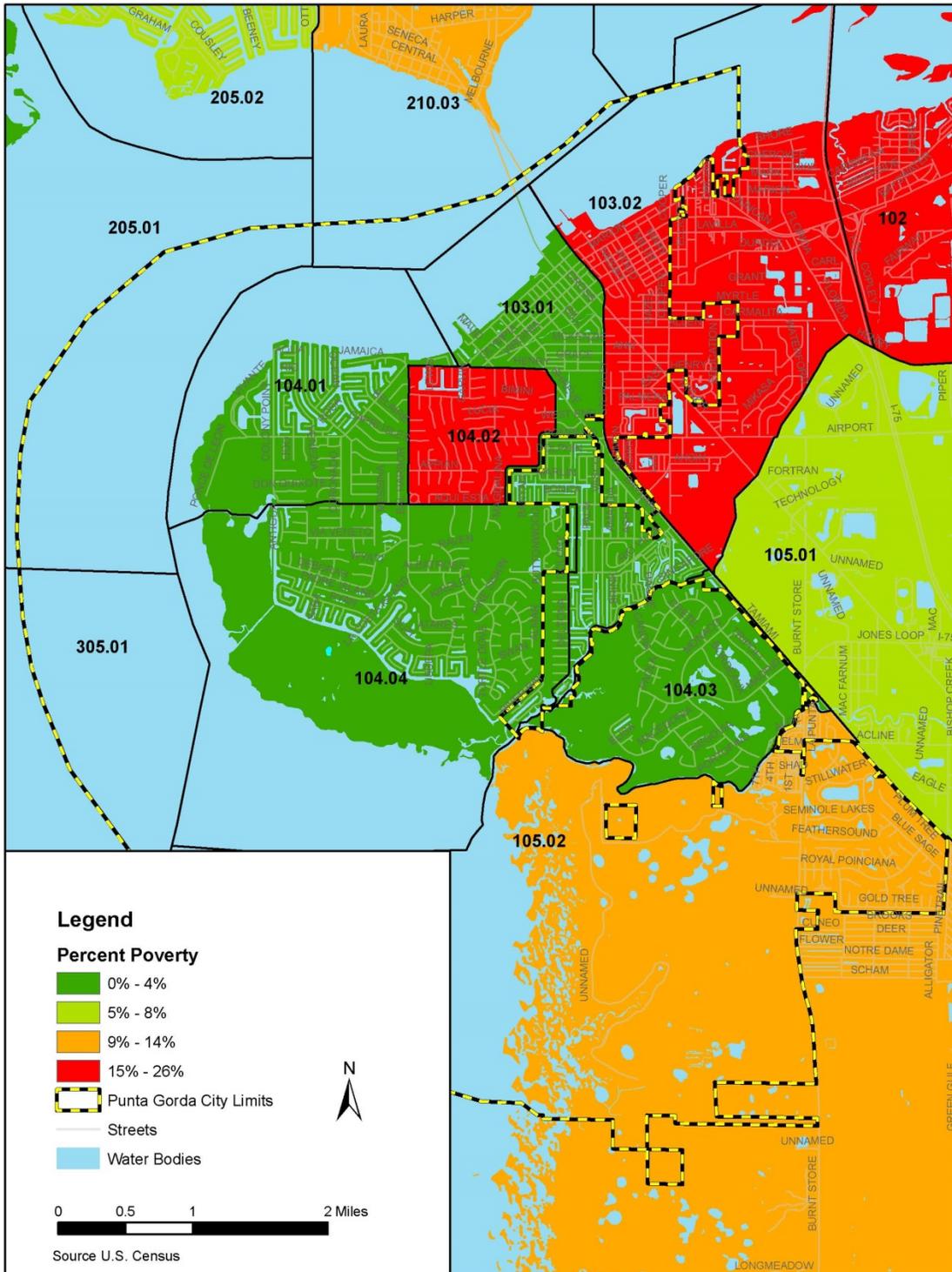
**TABLE 2.7
POVERTY BY RACE**

Race and Ethnicity	Total	Below Poverty Level	Percent Below Poverty Level
Total Population For whom Poverty is Determined	16,464	1,723	10.5%
One race	16,055	1,500	9.3%
White	15,138	1,406	9.3%
Black or African American	506	19	3.8%
American Indian and Alaska Native	124	73	58.9%
Asian	170	0	0.0%
Native Hawaiian and Other Pacific Islander	14	0	0.0%
Some other race	103	2	1.9%
Two or more races	409	223	54.5%
Hispanic or Latino origin (of any race)	762	290	38.1%
Non Hispanic or Latino	15,702	1,433	9.1%

Source: 2008-2012 American Community Survey

Map 2.7, on the next page, shows the concentrations of people living in poverty in the City

**MAP 2.7
PERCENT POVERTY**



2.3 - EMPLOYMENT

Employment opportunities in the area and educational levels of the employees can have a significant impact on housing affordability and the location choice of residents. Table 2.8, below, presents our analysis of occupation data, which indicate that there has been some shift in the distribution of occupations between 2000 and 2010. Retail had the largest increase, up 3.1 percentage points to 18.1 percent. Finance and insurance, and real estate and rental and leasing had the largest decrease, down 3.0 percentage points, followed by Educational services, and health care and social assistance, down 2.4 percentage points.

**TABLE 2.8
OCCUPATION THE POPULATION OF PUNTA GORDA**

Occupation	2000	2006-2010 Average	2008-2012 Average
Agriculture, forestry, fishing/hunting, and mining	0.0%	0.4%	0.9%
Construction	6.8%	7.0%	7.8%
Manufacturing	3.8%	5.7%	5.2%
Wholesale trade	2.6%	2.0%	2.4%
Retail trade	15.0%	16.1%	18.1%
Transportation and warehousing, and utilities	4.3%	5.9%	3.9%
Finance/Insurance/Real Estate	10.9%	10.0%	7.9%
Professional/Scientific/Waste Management	13.8%	10.1%	14.5%
Educational/Health Care/Social Assistance	23.0%	25.0%	20.6%
Arts, entertainment, and recreation, and accommodation and food services	11.5%	6.9%	13.3%
Other services, except public administration	4.3%	5.1%	2.5%
Public administration	4.0%	5.8%	3.0%
Total	100.0%	100.0%	100.0%

Source: 2000 Census, 2006-2010 American Community Survey, and 2008-2012 American Community Survey

The data presented in Table 2.9, provides a portrait of the distribution of the unemployed. Whites have the highest unemployment rate at 9.1 percent of the labor force aged 16 years or older. Hispanic persons in the same age group reported a 7.5 percent unemployment rate and African Americans reported a 6.4 percent rate. All three groups fall under the city-wide average of 9.3 percent. Whites also had the lowest work force participation rate, at 35.1 percent. Hispanics had 50.5 percent participation rate while African Americans had a 72.8 percent participation rate.

**TABLE 2.9
EMPLOYMENT AND UNEMPLOYMENT RATE BY RACE**

	White		Hispanic		African American		City-wide	
	Number	Percent	Number	Percent	Number	Percent	Number	Percent
In Labor Force	5,051	35.1%	305	50.5%	342	72.8%	5,641	36.8%
Employed	4,591	90.9%	282	92.5%	320	93.6%	5,116	90.7%
Unemployed	460	9.1%	23	7.5%	22	6.4%	525	9.3%
Not in Labor Force	9,340	64.9%	299	49.5%	128	27.2%	9,687	63.2%
Total	14,391		604		470		15,328	

Source: 2008-2012 American Community Survey

Table 2.10 illustrates the unemployment rate by age group. It should be noted that persons not in the Labor Force (Under 16 years of age and the retired population) are not included in the unemployment figures.

**TABLE 2.10
UNEMPLOYMENT BY AGE**

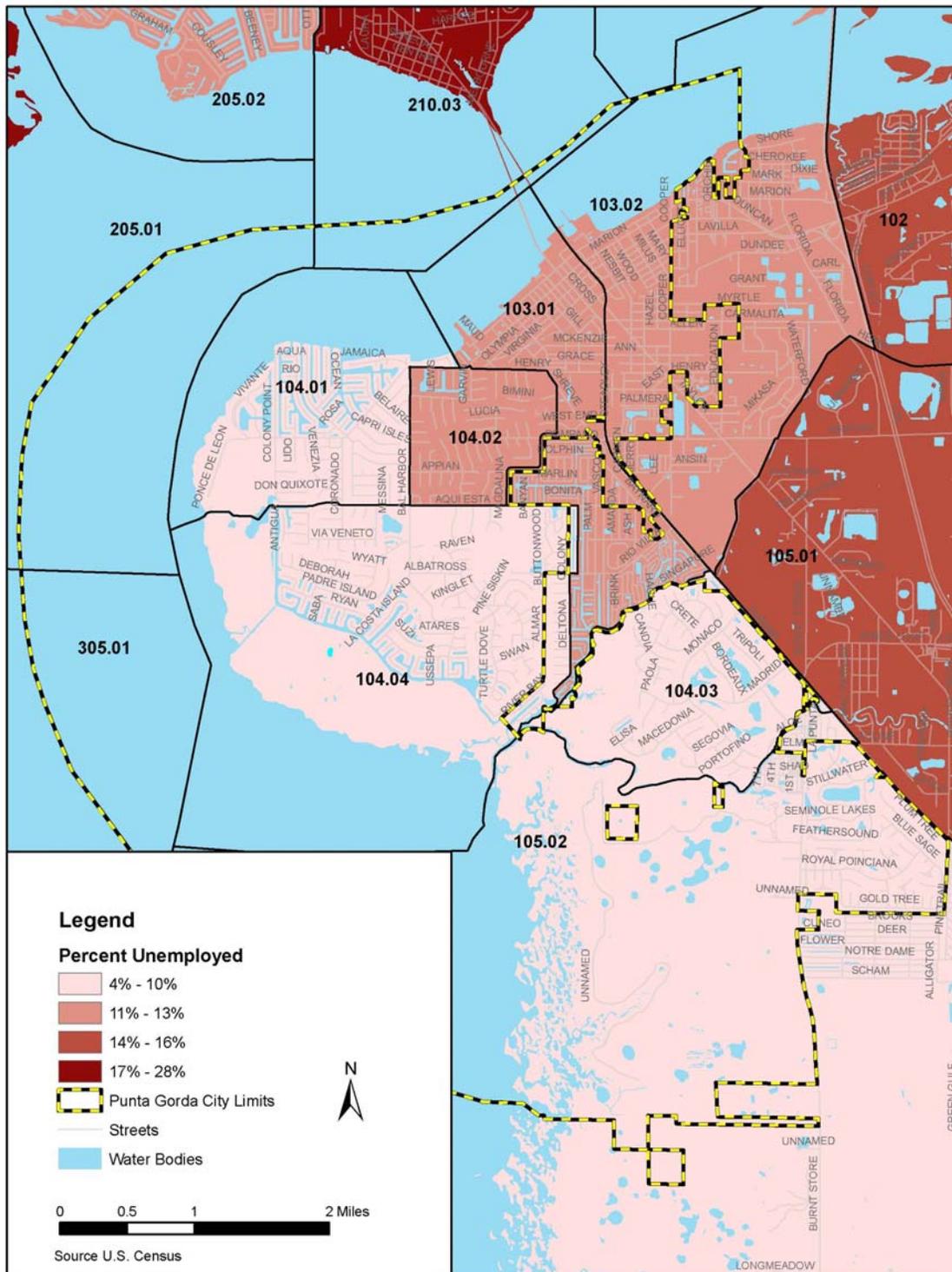
Unemployment by Age	Punta Gorda City, Florida			
	Total	In Labor Force	Employed	Unemployment Rate
Population 16 years and over	15,328	5,641	5,120	9.3%
AGE				
16 to 19 years	408	176	176	0.0%
20 to 24 years	294	243	178	26.7%
25 to 44 years	1,991	1,696	1,447	14.7%
45 to 54 years	1,539	1,177	1,128	4.2%
55 to 64 years	3,626	1,643	1,523	7.2%
65 to 74 years	4,168	575	546	5.0%
75 years and over	3,302	125	116	8.0%

Source: 2008-2012 American Community Survey

Map 2.8, on the following page, shows the distribution of unemployed in Punta Gorda.

The availability of jobs, consistent with the skill levels and educational levels of low income persons, is largely dependent on the geographic location of the jobs and the workforces' ability to get to and from the employment centers where those job are located. If jobs are concentrated in largely upper income areas, far removed from the areas where lower income persons live, their ability to get to and from work may be difficult, without public transportation, sometimes causing hardships on employees or potential employees that cannot afford their own private automobile.

**MAP 2.8
PERCENT UNEMPLOYED**



According to the major employer data provided by the Charlotte County Economic Development Department, the top employer in Charlotte County is Wal-Mart Stores, Inc. with 1,500 employees. The top twenty employers in the County can be found in the following table.

**TABLE 2.11
CHARLOTTE COUNTY’S LARGEST EMPLOYERS**

Company Name	Employees	Industry Sector
Wal-Mart Stores, Inc.	1,500	Retail Trade
St. Joseph Preferred Healthcare, Inc.	1,400	Healthcare
Publix Super Markets, Inc.	1,105	Retail Trade
Charlotte County	980	General Government
Fawcett Memorial Hospital	840	Healthcare
Port Charlotte HMA, LLC	700	Healthcare
Punta Gorda HMA, LLC	680	Healthcare
Home Depot U.S.A., Inc.	450	Retail Trade
Winn-Dixie Stores, Inc.	424	Retail Trade
Palm Chrysler Plymouth Dodge Jeep	300	Retail Trade
City of Punta Gorda	276	General Government
Palm Chevrolet-Oldsmobile, Inc.	230	Retail Trade
Punta Gorda Associates	230	Healthcare
Douglas T Jacobson State Veterans Home	200	Healthcare
Sam's West, Inc. (Sam's Club)	200	Retail Trade
Dillard's, Inc.	196	Retail Trade
Health Management Associates, Inc.	191	Healthcare
Smuggler's Enterprises, Inc.	185	Arts, Entertainment/Recreation
Trans Healthcare, Inc.	160	Healthcare
Old Punta Gorda, Inc.	150	Other Services

Source: Charlotte County Economic Development Department, 2014

In Punta Gorda, there appears to be a large education disparity between African Americans and the rest of the City. Only 5.7 percent of Whites and 8.4 percent of Hispanics have less than a high school diploma, while 26.8% of African Americans do not have a diploma. Similarly, 38.8 percent of Whites and 29.3 percent of Hispanics have at least a Bachelor’s degree, while only 8.5 percent of African Americans have reached this education level. The African American population has achieved an education level that includes some college or attainment of an Associate’s Degree. The 30.6% in this category are comparable to the total population figures for the City.

**TABLE 2.12
EDUCATIONAL ATTAINMENT BY RACE**

	White		African American		Hispanic		City-wide	
	Number	Percent	Number	Percent	Number	Percent	Number	Percent
Less than high school diploma	786	5.7%	91	26.8%	42	8.4%	883	6.0%
High school graduate, GED, or alternative	3,274	23.6%	116	34.1%	196	39.0%	3,505	24.0%
Some college or associate's degree	4,420	31.9%	104	30.6%	117	23.3%	4,643	31.7%
Bachelor's degree or higher	5,381	38.8%	29	8.5%	147	29.3%	5,595	38.3%
Total	13,861	100.0%	340	100.0%	502	100.0%	14,626	100.0%

Source: 2008-2012 American Community Survey

2.4 - PUBLIC TRANSPORTATION

There is no mass transportation system with fixed routes and schedules in Charlotte County since the geographic nature of the population distribution cannot sustain a fixed route system.

Public transportation in Charlotte County is provided by Dial-a-Ride and Sunshine Ride services. Dial-a-Ride provides curbside transportation to and from your destination on an advance reservation basis. According to Charlotte County, the Dial-a-Ride Service Area includes all of Charlotte County located west of the Myakka River (excluding the barrier islands, but including the Charlotte County portion of Boca Grande Island). It serves all of mid-county, located between the Myakka and the Peace Rivers. And, it includes the Punta Gorda area, extending as far south as Tropical Gulf Acres, east to the Charlotte County Airport, and north to Peace River Shores on US-17. Service on Burnt Store Road extends to South Punta Gorda Heights (Scham Road). This service is available from 6:30 am to 6:00 pm all weekdays, and Saturdays from 9 am to 6 pm, at a base fare of \$3, and reduced fares are available for qualified passengers.

Sunshine Ride provides transportation services to elderly, disabled, low-income or rural residents. The service operates to connect passengers to medical centers, pharmacies, grocery stores and other similar destinations. This service is available at \$1 per trip. To qualify, riders complete an application that takes 2-3 business days for processing. Once enrolled in the service, passengers may make reservations 48- hours-in-advance to places considered life-sustaining destinations.

2.5 - HOUSING

As shown in Table 2.13, below, there were 8,907 housing units in Punta Gorda in 2000. The housing units have grown 29% for the 2008-2012 average. Currently, 55.8 percent of units in the city are owner-occupied, 15.1 percent are renter-occupied, and 29.1% of units are vacant.

**TABLE 2.13
TENURE OF HOUSING UNITS**

	2000		2006-2010 Average		2008-2012 Average	
	Number	Percent	Number	Percent	Number	Percent
Owner Occupied	6,214	69.8%	6,835	59.0%	6,420	55.8%
Renter Occupied	951	10.7%	1,608	13.9%	1,731	15.1%
Vacant	1,742	19.5%	3,137	27.1%	3,349	29.1%
Total	8,907	100.0%	11,580	100.0%	11,500	100.0%

Source: 2000 Census, 2006-2010 American Community Survey, and 2008-2012 American Community Survey

The median housing value for owner occupied units in the City was \$302,300. Of the 6,420 owner-occupied housing units, 3,057 have a mortgage and 3,363 do not have a mortgage. Median monthly housing expenses for the units with a mortgage are \$2,105, and \$732 for units without a mortgage. Median gross rent for the 1,731 renter-occupied units is \$830.

Table 2.14, below, shows that of all housing units in Punta Gorda, 58.9 percent were categorized as single-family detached housing units, 3.3 percent as single-family attached units, 9.1 percent contained two to four units, 25.6 percent were multifamily, and 3.1 percent mobile home or other.

**TABLE 2.14
TYPES OF HOUSING STRUCTURES**

Units in Structure	Number	Percent
Single Family Detached	6,770	58.9%
Single Family Attached	382	3.3%
2-4 Units	1,051	9.1%
Multifamily	2,943	25.6%
Mobile Home or Other	354	3.1%
Total	11,500	100.0%

Source: 2008-2012 American Community Survey

As shown on Table 2.15, below, 0.7 percent of all housing units were built prior to 1950, 2.1 percent were built between 1950 and 1959, 3.5 percent were built between 1960 and 1969, 13.0 percent were built between 1970 and 1979, and 80.7 percent were built after 1979. About 2.8 percent of the housing stock is more than 50 years old, built prior to 1960. About 6.3 percent of the housing stock was built prior to 1970 and based on national standards, these units may contain lead-based paint or likely be in need of repairs and maintenance.

**TABLE 2.15
YEAR OCCUPIED STRUCTURE BUILT**

Year Built	Number	Percent
Built 2010 or later	17	0.1%
Built 2000 to 2009	3,320	28.9%
Built 1990 to 1999	2,767	24.1%
Built 1980 to 1989	3,173	27.6%
Built 1970 to 1979	1,492	13.0%
Built 1960 to 1969	400	3.5%
Built 1950 to 1959	247	2.1%
Built 1940 to 1949	17	0.1%
Built 1939 or earlier	67	0.6%
Total	11,500	100.0%

Source: 2008-2012 American Community Survey

According to the 2008-2012 ACS data shown in Table 2.16, the homeownership rate among Whites in Punta Gorda was 79.4 percent, compared to 56.0 percent among Hispanics, and 40.4 percent among African-Americans.

**TABLE 2.16
RACE BY TENURE**

	Owner-occupied		Renter-occupied	
	Number	Percent	Number	Percent
White	6,158	79.4%	1,597	20.6%
Hispanic	169	56.0%	133	44.0%
African American	76	40.4%	112	59.6%

Source: 2008-2012 American Community Survey

On average, the home values in Punta Gorda are higher than the State average. In 2013, the average just value of a single family home was \$266,871 compared to a State-wide average of \$166,535. In 2013, the average sales price for a single family home was \$300,478. The median sales price for the past six years can be found in the table below. Most recently, the 2013 median sales price was \$290,000, by comparison, the statewide median sales price was \$170,000.

**TABLE 2.17
MEDIAN SALES PRICE**

Housing Type	2008	2009	2010	2011	2012	2013
Single Family Homes	\$320,000	\$289,500	\$285,000	\$255,000	\$287,000	\$290,000
Condominiums	\$249,250	\$168,750	\$160,000	\$133,700	\$140,000	\$156,000

Source: Shimberg

A breakdown of Gross rent for the City is found in the table below. The Median Gross rent for Punta Gorda is \$830, compared to a State wide average of \$987.

**TABLE 2.18
GROSS RENT**

	<\$200	\$200- \$299	\$300- \$499	\$500- \$749	\$750- \$999	\$1,000- \$1,499	\$1,500 or More	No Cash Rent
Punta Gorda	33	31	54	471	572	288	164	118

Source: 2008-2012 American Community Survey

The U.S. Department of Housing and Urban Development (HUD) provides Fair Market Rent Values for the County. Analysis shows that rent has been steadily dropping for the past five years.

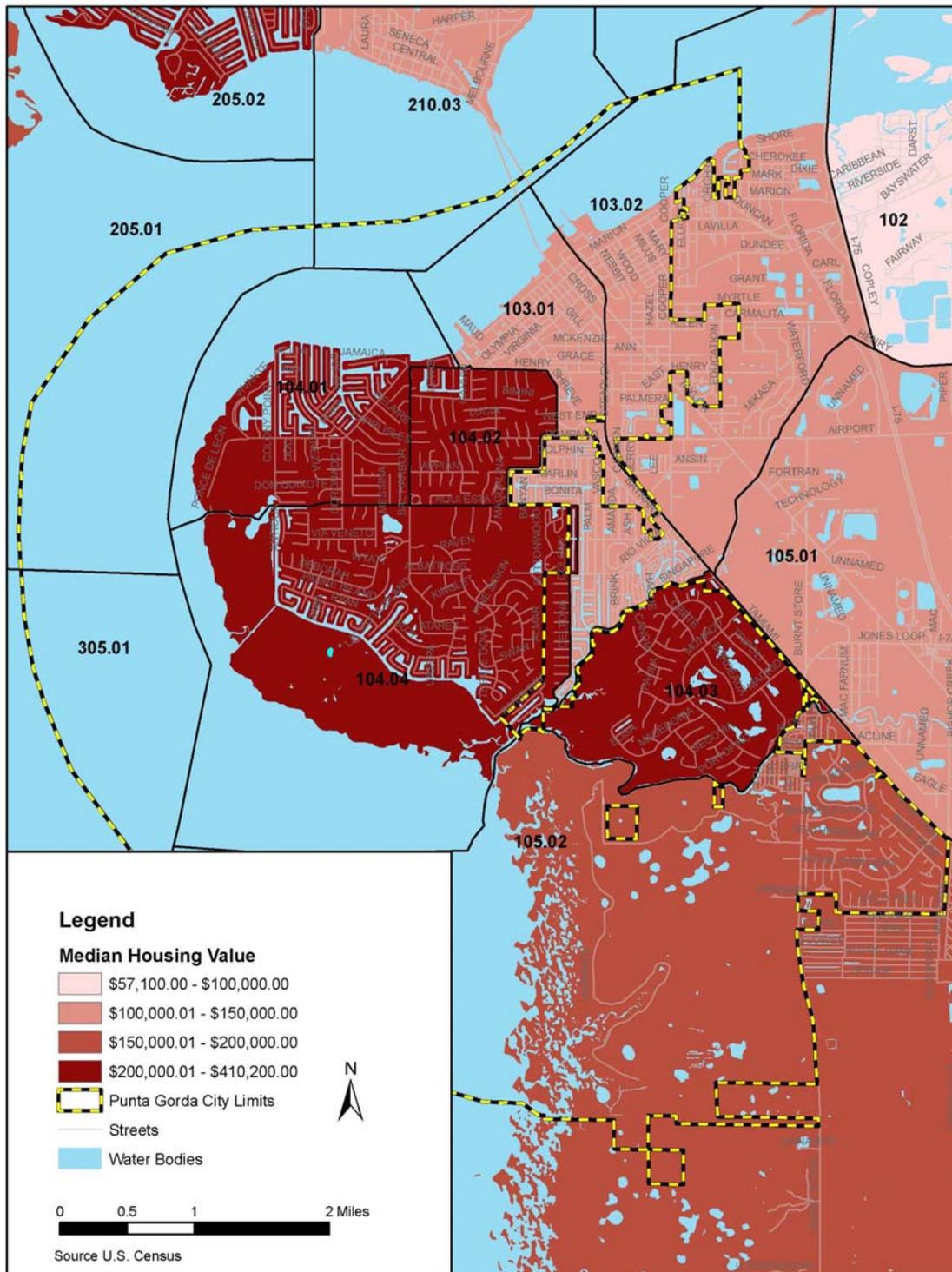
TABLE 2.19
HUD FAIR MARKET RENT

Year	0 Bedroom	1 Bedroom	2 Bedroom	3 Bedroom	4 Bedroom
2014	\$511	\$673	\$859	\$1,220	\$1,224
2013	\$512	\$675	\$861	\$1,223	\$1,227
2012	\$638	\$668	\$867	\$1,266	\$1,523
2011	\$676	\$708	\$918	\$1,340	\$1,613
2010	\$683	\$715	\$928	\$1,355	\$1,630

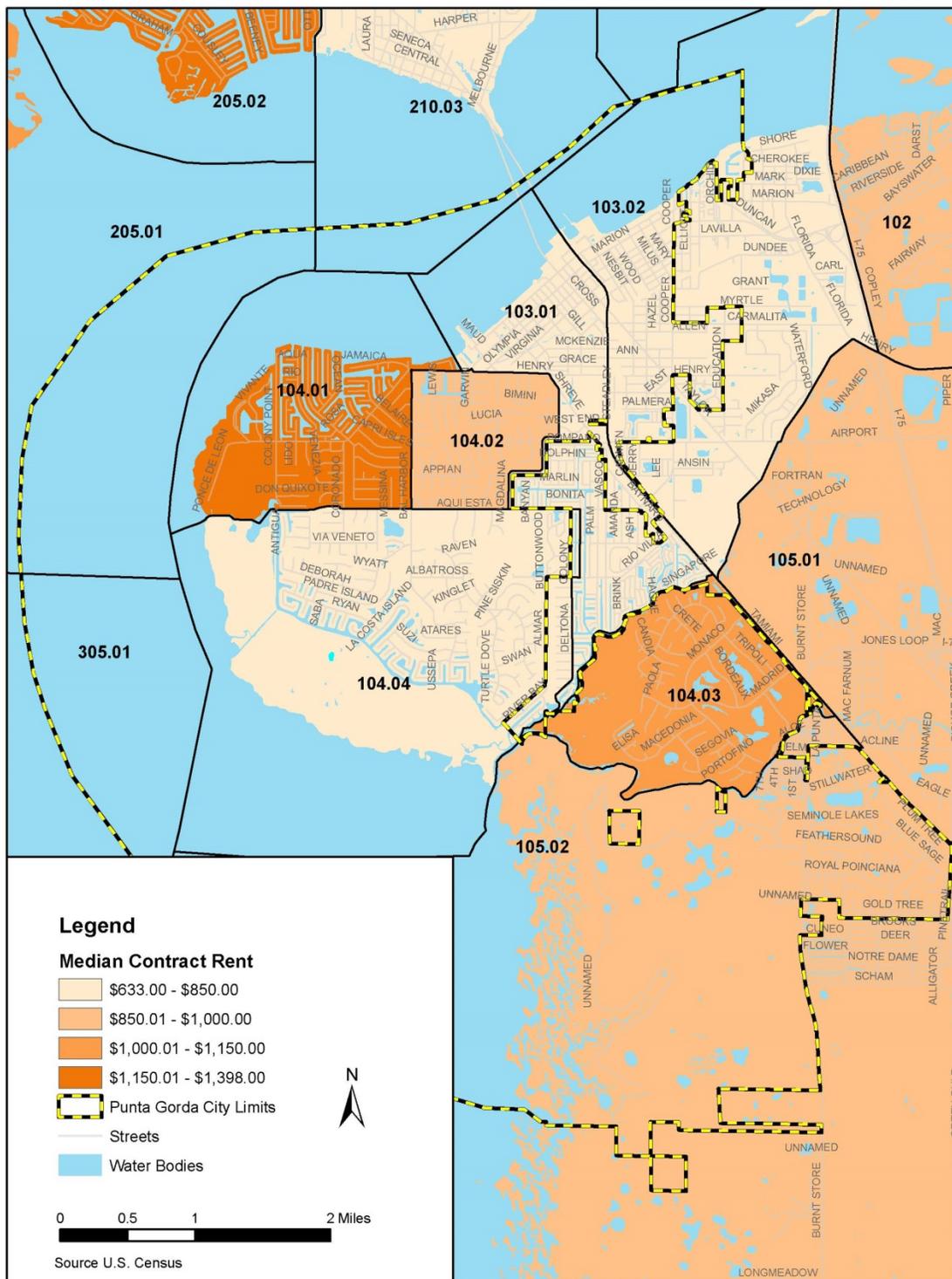
Source: U.S. Department of Housing and Urban Development

Maps 2.9 and 2.10, on the following pages, provide a geographic depiction of the distribution of housing values and rents across the City.

**MAP 2.9
MEDIAN HOUSING VALUE**



**MAP 2.10
GROSS RENT**



Cost Burden is defined as the total cost of housing including rent or mortgage and operating utilities. If a household pays more than 30% of their income for housing costs, it is considered to be Moderately Cost Burdened. If any household pays more than 50% of income for housing costs it is considered to be Severely Cost Burdened. In the following table, household income is measured as a percentage of the median income for the county or area, adjusted for family size. In Punta Gorda and the surrounding metro area of Charlotte County, the median income for a family of four is \$55,700 in 2014.

As seen in the following table, 55.7 percent of households that have an income of less than 30% of the area median income spend more than 50 percent of their income on housing. On the other hand, 90.9 percent of households that make at least 80% of the area median income spend less than 30% of their income on housing.

**TABLE 2.20
HOUSEHOLD INCOME AS A PERCENTAGE OF AREA MEDIAN INCOME BY COST BURDEN**

Household Income as Percentage of Area Median Income	Amount of Income Paid for Housing					
	0-30%	Percent	30-50%	Percent	50% or more	Percent
<=30% AMI	163	27.1%	103	17.2%	334	55.7%
30.01-50% AMI	410	42.1%	251	25.7%	314	32.2%
50.01-80% AMI	976	62.1%	413	26.3%	183	11.6%
80.01+% AMI	5,070	90.9%	438	7.9%	68	1.2%
Total	6,619	75.9%	1,205	13.8%	899	10.3%

Source: Shimberg, 2009

As seen in the table below, 22.1 percent of homeowners in the City are cost burdened. Renters, on the other hand, are burdened at a rate of 37.6 percent.

**TABLE 2.21
TENURE BY COST BURDEN**

Tenure	Amount of Income Paid for Housing					
	0-30%	Percent	30-50%	Percent	50% or more	Percent
Owner	5,912	77.9%	983	12.9%	695	9.2%
Renter	707	62.4%	222	19.6%	204	18.0%

Source: Shimberg, 2009

Substandard Housing

The American Community Survey measures four different identifiers that are seen as housing problems. The four housing problems are: incomplete kitchen facilities, incomplete plumbing facilities, more than 1 person per room, and no heating fuel used. As seen in the table below, 59 occupied housing units in the City do not use a heating fuel, 20 units lack complete kitchen facilities, and 23 units lack complete plumbing facilities. Because a unit may have more than one of these conditions, the sum of these units is not an appropriate estimate for the number of substandard units in Punta Gorda.

TABLE 2.22
HOUSING CONDITION CHARACTERISTICS (OCCUPIED UNITS)

Substandard Housing	Number	Percent
1.01 or More Persons per Room	0	0.0%
No Fuel Used	59	0.7%
Lacking Complete Kitchen Facilities	20	0.2%
Lacking Complete Plumbing Facilities	23	0.3%

Source: 2008-2012 American Community Survey

SECTION 3 PUBLIC POLICY

3.1 - INTRODUCTION

Impediments to fair housing choice include any actions, omissions or decision taken because of race, color, religion, sex, disability, familial status, or national origin that restrict housing choice or the availability of housing choice, and actions, omissions, or decisions that have that affect. The purpose of this report is to review and evaluate local programs and policies, and zoning and land development regulations to identify potential impediments to the development of fair housing, and recommend appropriate changes. This evaluation includes review of the policy and regulatory documents for the City of Punta Gorda, Florida as follows:

Regulatory Documents

- The City of Punta Gorda Comprehensive Plan Elements including:
 - a. Housing Element
 - b. Future Land Use Element
- The City of Punta Gorda Code of Ordinances including:
 - a. Land Development regulations
 - b. Impact Fees, Development and Permitting Fees

3.2 - ANALYSIS

The Housing and Future Land Use elements of the comprehensive plan are reviewed because they directly affect housing development of all kinds. The Housing Element includes the policy guidance for the development of affordable housing, protection and enhancement of existing neighborhoods, and historic preservation. The Future Land Use Element designates densities and intensities of development, categorizes areas in the City where different land use types are permitting, and establishes broad policy for land development.

Housing Element – The City of Punta Gorda Housing Element “will act as the guide to local decision makers in their efforts to enact policy that will affect the housing needs of the City’s residents.” It further states that:

- The Element examines existing conditions and projects future trends to address short and long term needs;
- The Element states that housing needs will be met by the private sector;
- The City’s Land Development Regulations and applicable building codes, guide the private sector in the development and construction of housing;
- The Housing Element is closely related to other elements of the Comprehensive Plan including:
 - Future Land Use which identifies land to accommodate the housing needs;
 - Transportation which addresses the requirements necessary to meet traffic needs;
 - Infrastructure which addresses public facilities and services needed for housing;

- Recreation and Open Space which addresses recreational needs
- Capital Improvements which addresses levels of service for public facilities

The Housing Element also describes sections of the City’s Land Development Regulations and how they influence housing, including:

- Article 2 which promotes infill development and affordability through housing opportunities to smaller households, and discourages urban sprawl;
- Article 3 which regulates density and configuration of new development
- Article 5 which allows for a variety of planned developments and promotes density allowances in return for flexibility in building styles and types
- Impact Fee Deferral allows for qualified projects to defer payment of City-imposed impact fees

The Housing Element describes several housing programs and providers including State Housing Initiatives Partnership (SHIP) and Section 8 Vouchers, as well as several community development corporations and Charlotte County, and identifies existing subsidized housing including group homes, assisted living, elderly housing and affordable family housing.

The Housing Element Inventory & Data analysis includes review of housing units by type, tenure, and age. It also includes review of the number of building permits issued by year from 2010 to 2014, rental rates, property values, cost of owner-occupied units, cost-burden, housing condition, inventory of subsidized housing, and inventory of various categories of housing. There is also analysis and projections of population and housing needs based on income, age, tenure, etc.

The analysis and projections in the Housing Element include the following:

- Total households from 2013 to 2025 are projected to increase from 8,598 to 9,527.
- Households 65 years of age and older from 2013 to 2025 are projected to increase from 5,023 to 5,428.
- Households at or below 80% of the Area Median Income (AMI) will increase from 2,502 to 2,813 between 2013 and 2025.
- Severely cost burdened households under 80% of AMI will increase for owner occupied households from 805 to 874 between 2013 and 2025.
- Severely cost burdened households under 80% of AMI will increase for renter occupied households from 340 to 418 between 2013 and 2025.

Projections of housing need in Punta Gorda include the following:

- Permanent non-seasonal housing, new construction needs is 1,014 units by 2025, with 339 of these units needed for low-income
- By 2025 there will be 1,907 cost burdened elderly residents, and an anticipated need for additional group homes for the elderly. The Housing Element identifies special needs

housing categories for handicapped and homeless although does not project future needs specifically for the City

Housing Element Goals, Objectives and Policies that are relevant to this analysis are as follows:

Goal 4.1: The long-term end toward which Punta Gorda's housing activities and programs are directed is an adequate supply of land and housing, including a variety of housing types and costs, to meet the needs of very low, low and moderate income households, both present and future; the conservation and rehabilitation of the current housing stock, including historic structures; the elimination of substandard housing conditions; the appropriate siting of group and foster care facilities in residential areas, and the coordination of housing programs with other agencies.

Objective 4.1.1: Throughout the planning period through 2020, Punta Gorda will provide for a variety of housing types and residential densities to accommodate the needs of current and future populations, as well as meeting the special housing needs of its citizens.

Policy 4.1.1.1: Punta Gorda's Future Land use Plan and Future Land Use Plan Map will provide a variety of residential land use categories to accommodate varying housing densities and housing types.

Measurement: The number of housing units by type constructed annually.

Policy 4.1.1.2: Consistent with the Comprehensive Plan, Punta Gorda's Land Development Regulations (including zoning regulations) will make possible a variety of lot sizes, densities, and housing types, including single-family, multi-family, mobile home, patio homes, and zero lot line homes.

Measurement: Existence of zoning district regulations that allow for a variety of lot sizes and housing types.

Policy 4.1.1.3: The City of Punta Gorda with the assistance of Growth Management Department (planning, zoning, and building) shall provide education-awareness programs so that the public can gain a better understanding of the need for affordable housing. These programs will also address resident's aversion to the proximity of affordable housing and the general negative public perception regarding affordable housing.

Measurement: The annual number of City residents that have been informed about affordable housing and available programs.

Policy 4.1.1.4: Consider adoption of standards in the Land Development Regulations (LDR's) for inclusionary housing, with the intent of increasing the supply of affordable housing. Such regulations should either require that all residential development contain an affordable housing component, or pay a fee-in-lieu-of to a fund. The requirements should be either mandatory or incentive based.

Measurement: Number of affordable housing units included in new development and/or property purchased for donation to the Land Trust to be used for construction of affordable housing from monies received as payment of fee-in-lieu of.

Policy 4.1.1.8: Punta Gorda will work with local contractors and the community to study and promote the design of home features that will help elderly and handicapped persons to live independently as disability conditions progress (e.g., removable floor level cabinets to facilitate wheel chair access, extra studs in bathroom walls for grab-bar installation, wider doorways and halls, and lever type door openings, etc.).

Measurement: Public information developed and distributed concerning such features.

Policy 4.1.1.10: Punta Gorda will include accessory apartments for relatives as an allowed use in owner-occupied dwellings.

Measurement: An amendment to the Land Development Regulations allowing accessory apartments for relatives of owner-occupied dwellings.

Policy 4.1.1.11: Punta Gorda will continue to provide for increased housing densities in Planned Development (PD's) as a developer incentive to accommodate the housing needs of very low, low, and moderate-income persons. Density bonuses could be up to 50% depending upon site conditions and compatibility with surrounding uses.

Measurement: Annually, the number of housing units developed in Planned Development (PD's) for low-income housing that is affordable to persons in these income groups.

Policy 4.1.1.12: Review the City's Land Development Regulations (LDR's) on an annual basis to ascertain if there are any regulations which unnecessarily drive up the cost of housing.

Measurement: Amendments to the City's Land Development Regulations, as needed.

Policy 4.1.1.13: Punta Gorda will seek to develop partnerships with Builder's Associations to improve the efficiency and expand the capacity of the housing delivery process.

Measurement: Percentage of affordable housing demand met.

Policy 4.1.2.4: Punta Gorda will use discretionary Community Development Block Grant (CDBG) funds to support neighborhood improvement.

Measurement: The annual amount of CDBG money used for neighborhood improvement.

Objective 4.1.5: Throughout the planning period through 2020, Punta Gorda will ensure the provision of an adequate supply of affordable housing (for very low, low, and moderate income persons), including mobile and manufactured units, appropriately distributed throughout the community.

Policy 4.1.5.4: Punta Gorda will promote the construction of affordable housing by allowing the use of innovative techniques, such as density bonuses, zero lot line construction, etc., through the Planned Development (PD) process (very low, low, and moderate income benefit).

Measurement: Amendment of the Land Development Regulations for affordable housing needed.

Objective 4.1.7: The City shall attempt to increase the opportunity for all citizens to purchase or rent decent, safe and sanitary housing which they can afford, from arbitrary discrimination because of race, sex, handicap, ethnic background, age, marital status or household composition.

Policy 4.1.7.1: Punta Gorda will make fair housing information available, including complaint procedures under City Ordinance 600-80, and phone numbers for Charlotte County, state, and federal agencies which have fair housing laws and enforce them.

Measurement: The annual number of complaints submitted to the City claiming discrimination in housing.

Policy 4.1.7.2: Punta Gorda will continue to assure that access is provided to handicapped persons in multi-family developments consistent with the 1992 Americans with Disabilities Act, as implemented through the Florida Accessibility Code for Building Construction, January 1994 Edition with 1996 Addendum, Florida Department of Community Affairs. As part of the review of the existing Land Development Regulations, Punta Gorda will examine the impacts of existing regulations upon the mobility and access needs of handicapped persons.

Measurement: Annually, the number of development plans reviewed for multi-family developments in the City requiring compliance with the 1992 Americans with Disabilities Act.

Policy 4.1.7.3: Punta Gorda will make information available to the public concerning housing and weatherization programs and/or grants provided by the State and Federal Government, as well as private agencies.

Measurement: The annual number of City residents that have been informed about and/or assisted about weatherization programs and/or grants provided by State and Federal Government, as well as private agencies.

Future Land Use - The City of Punta Gorda Future Land Use Element (FLUE) establishes “through Goals, Objectives, and Policies the desired vision of the City of Punta Gorda that will govern the logical pattern for continued growth and development in accordance with the State of Florida Comprehensive Plan.” In addition, this element “provides the foundation for all other Elements of the Comprehensive Plan to create a cohesive and precise vision of the future of the community.” It further addresses the following:

- Related local regulations including the Land Development Regulations
- Other City plans including the 2000 Eastside and Downtown Planning Study, 2005 CRA Charrette Plan, and 2005 Citizens Master Plan

- Inventory and analysis of existing land uses
- Designation of Future Land Use categories and allowable uses

The following are relevant goals, objectives and policies of the City of Punta Gorda Future Land Use Element:

Policy 1.1.3.2: Implement improvements to public facilities and infrastructure, public services, housing, etc., which benefit low- and moderate-income persons, using Community Development Block Grant (CDBG) and/or other sources of funds.

Measurement: Funds received annually and applied to projects benefitting low- and moderate-income persons.

Objective 1.1.12: Where particular aims of the comprehensive plan may be advanced (such as affordable housing, historic preservation, protection of environmentally sensitive areas, discounted acquisition of land for public purposes, or downtown redevelopment), Punta Gorda will employ or make available innovative land development techniques such as TDR's, density bonuses, PUD's, mixed use land use classifications and zoning, or other techniques.

Policy 1.1.12.1: Punta Gorda has made available a Transfer of Development Rights (TDR) process for historic preservation, protection of environmentally sensitive areas, or sale of property at discount to a public agency for public purpose, and Punta Gorda will make available density bonuses for the development of affordable housing.

Measurement: Number of inquiries each year in which TDR's and density bonuses are explained and number of TDR's and density bonuses issued.

Policy 1.1.12.2: Punta Gorda's Professional Office and Commercial FLUM categories will be configured to allow mixed uses in the Downtown Redevelopment Area and other appropriate parcels.

Measurement: Existence of mixed use provisions for these FLUM categories as outlined in Policies 1.1.14.2 and 1.1.14.3.

Objective 1.1.14: Punta Gorda will maintain a Future Land Use Map and land use classification system that provides for the distribution, extent and location of a variety of land uses.

Policy 1.1.14.1: Residential lands are areas that are intended to be used predominantly for housing. Other uses that are consistent with residential character may be permitted subject to the requirements of the land development regulations. Examples of potentially compatible uses include, but are not limited to, houses of worship, nursing homes, parks, golf courses, libraries, schools, and day care centers. Allowances for increase density may be made under the PUD process where there is a commitment to provide affordable housing, to preserve wetlands or other resources, to provide land for needed public facilities, or to reduce the allowable density in a coastal high hazard area that results in a net reduction in the number of units allowed in such

areas within the City, or when density can be reallocated from the downtown district to other areas within the CHHA that satisfy F.S. Chapter 163.3178(9).

Measurement: Existence of implementing zoning classifications and number of units in new construction plans approved each year pursuant to regulations governing these zoning classifications.

Policy 1.1.14.3: Highway Commercial Corridor lands identified on the Future Land Use map shall be developed: c. to allow a residential density of 3.5 units per acre in areas where residential uses will promote affordable housing or compact and contiguous development.

***Conclusion** - The City of Punta Gorda Housing and Future Land Use Elements provide good policy guidance for developing affordable housing and special needs housing. The Housing Element addresses a broad range of housing issues and affordabilities, and the Future Land Use Element provides a variety of housing types for a range of affordability and housing needs. In that regard, these plan elements include the following:*

- *Acknowledgement that housing needs will be addressed by the private sector with guidance from the City through the comprehensive plan and land development regulations;*
- *Identify growth in need for elderly housing, and for severely cost burden households;*
- *Allow a broad range of densities, and encourage affordable and elderly housing through density bonuses and transfer of development rights in planned development districts; and,*
- *Allows residential density in commercial and downtown areas to encourage mixed use where there is access to activities of daily living for elderly residents.*

There do not appear to be any policies in the Housing or Future Land Use elements that present impediments to fair housing choice.

The **Code of Ordinances** addresses a wide range of municipal issues, and provides the specific regulations needed for implementing the various elements of the Comprehensive Plan. Relevant sections of the Code include Chapter 7, Building; Chapter 11 Impact fees; Chapter 11A, Affordable Housing Impact Fees; Chapter 16A, Planning; and Chapter 26 Land Development Regulations.

Chapter 7, Building addresses the regulatory function of the City regarding building construction, includes “green building program” requirements, adopts permit fees, and provides standards for safe/unsafe housing and structures. The green building program is voluntary for private projects and includes expedited permitting as well as project marketing as an incentive for participation in the program.

Chapter 11 and 11A establish impact fees for new development. Chapter 11 establishes the necessary findings for enacting impact fees; includes relevant definitions; determines applicability; establishes impact fee districts for parks, roads, police, fire and general government; and establishes the following impact fees:

- Parks – for residential units based on the square footage for single family and ranging from \$564 per unit to \$1,047; and \$322 per unit for all other dwellings;
- Roads – for residential units based on the square footage for single family and ranging from \$288 per unit to \$514; and \$161 per unit for all other dwellings;
- The ordinance has “suspended indefinitely” the impact fees for police, fire and general government.

Chapter 11A is established to encourage the provision of new affordable housing by providing a deferral of impact fees on qualified units. This chapter includes an application process, and allows a deferral of impact fees if approved after making application. If approved the project would be subject to a Impact Fee Deferral Agreement recorded in the public records and is accepted by the City in lieu of payment unless the project/unit is sold, breach of the agreement, or if the owner/resident fails to qualify.

Chapter 16A, Planning, adopts the Comprehensive Plan by ordinance and establishes the Planning Commission as the local planning agency for the City of Punta Gorda.

Chapter 26 of the Code of Ordinances is the Land Development Regulations and includes provisions for purpose and intent, establishment of districts, permitted uses, lot and building regulations, architectural standards, and various other regulations. Article 3, Regulating Districts, establishes the zoning districts and related regulations for the City of Punta Gorda and implements related policies of the comprehensive plan.

Article 3 includes a broad range of zoning categories which allow a variety of housing types including single-family, multi-family, mobile home, and mixed use. Specific districts and relevant standards include the following:

- **EP, Environmental Preserve District** – composed of environmentally sensitive areas intended to preserve and protect open space
 - Minimum lot size of 10 acres
 - Allows 1 residential unit per 10 acres
 - Other uses are allowable by right or special exception subject to development plan approval
- **GS, General Single-Family Residential** – established solely to accommodate completion of previously approved development of land, and not available for rezonings
 - Minimum lot size of 9,600 square feet for GS 3.5, and 7,200 square feet for GS-5
 - Allows single-family homes, excluding mobile homes
 - Allows group homes “permitted with conditions” (per section 4.5)
 - Child and day care facilities are allowed by Special Exception
- **GM, General Single-Family Residential** – intended to be medium to high-density residential, with emphasis on multi-family use.
 - Minimum lot size of 8,000 square feet
 - Allows group homes “permitted with conditions” (per section 4.5)
 - Child care, day care, and nursing homes are allowed by Special Exception
 - Rooming or boarding housings are allowed by Special Exception subject to requirements of Article 8

- **MH, Manufactured Home** – established to provide for the development of neighborhoods which utilize manufactured housing as its principle building type.
 - Minimum lot size of 8,000 square feet
 - Allows group homes “permitted with conditions” (per section 4.5)
- **NR, Neighborhood Residential District** – provides for residential development surrounding the traditional town center and its regional extensions.
 - Minimum lot size of 8,000 square feet
 - Allows group homes “permitted with conditions” (per section 4.5)
 - Child and day care are allowed by Special Exception
- **NC, Neighborhood Center District** – provided for the location of pedestrian scaled shops, services, small workplaces, and residential buildings central to a neighborhood
 - No minimum lot size
 - Allows group homes “permitted with conditions” (per section 4.5)
 - Day care home serving 3 or fewer persons as an accessory use
- **CC, City Center District** – encourages redevelopment and expansion of the traditional town center, allows a broad array of uses and higher density housing in a compact, pedestrian-oriented environment.
 - No minimum lot size
 - Allows group homes “permitted with conditions” (per section 4.5)
 - Day care home serving 3 or fewer persons as an accessory use
 - Rooming or boarding housings for up to six roomers are allowed by Special Exception
 - Congregate housing designed within “civic” building principles
- **MO, Medical Overlay District** – provides for the logical expansion of the medical office needs necessary to accommodate the growing community and region.
 - No minimum lot size
 - Allows child and adult day care facilities, group homes, adult congregate living facilities, and independent living facilities as permitted uses
 - Detoxification centers and substance abuse centers associated primarily with the primary medical facility are allowed with conditions
- **PDN, Planned Development Neighborhood District** – encourages the development of a mixture of housing types and price ranges and to promote the organization of residential development into efficient neighborhoods with support uses.
 - No minimum lot size specified, Section 5.9 establishes procedures for approval of a PDN district
 - Allows group homes and nursing homes as permitted uses
- **PEC, Planned Employment Center District** – encourages innovative and creative design or retail, office and industrial development.
 - No minimum lot size specified, Section 5.9 establishes procedures for approval of a PEC district
 - Allows group homes as a permitted use

Article 4, Uses Permitted with Conditions, acknowledges that there are certain uses that exist which may be constructed provided they meet certain mitigating conditions specific to their design and/or operation. Several relevant uses include:

- **Accessory Dwelling**, may be allowed subject to conditions including: principal uses is a single-family home; no more than one accessory dwelling is permitted; the accessory dwelling shall be owned by the same person as the principal dwelling; no separate driveway is permitted; a detached accessory dwelling shall not exceed 650 square feet of the first floor area or 50% of the first floor area of the principal dwelling.
- **Group Homes**, may be allowed subject to the following conditions: five or less unrelated individuals other than the homeowner are allowed in a group home; may be located in any residential district; must be registered with the State of Florida Department of Human Resources; adjacent property owners must be notified; group homes of more than five individuals or where the property owner does not reside at the home, are considered an institutional facility and may only operate in the NC and CC zoning districts; group homes shall not be located within ½ mile radius of another group home.
- **Day Care Centers**, may be allowed subject to the following conditions: centers for children must provide a minimum rear yard area of 2,500 square feet (and must be fenced) unless adjacent to a park; front yards are not to be used for recreation.

Article 7 establishes Architectural Provisions and serves as a framework for the architectural and building design requirements of the land development regulations, however do not apply to single family or duplex. Provisions include:

- Building style, requiring that buildings reflect the vernacular architecture of old Punta Gorda by incorporating design elements in the Historic District Guidelines
- Building principles that address compatibility with adjacent buildings, design of facades, primary building entrance, mechanical equipment, and lighting
- Standards for residential; manufactured housing; commercial storefront and workplace; highway commercial; and civic buildings

Article 8, Section 8.16 includes provision for Transfer of Development Rights (TDR) that identifies conditions under which a transfer may occur, and a process for transferring rights. Conditions include identification of a public purpose such as affordable housing.

Article 19 provides the following definitions:

Adult Congregate Living Facility – Adult congregate living facility means any State Agency for Health Care Administration licensed building or buildings, section of a building or distinct portion of a building, residence, private home, boarding home, home for the aged or other place whether (where) for a period exceeding twenty-four hours, housing food service and one or more personal services (are provided) for adult resident clients, not related to the owner or administrator by blood or marriage, who require such services.

Congregate Housing – Any Florida Department of Health and Rehabilitative Services licensed building or buildings, section of a building, or distinct portion of a building, residence, private home, boarding home, home for the aged, or other place, whether operated for profit or not, which undertakes through its ownership or management to provide, for a period exceeding 24

hours, housing, food service, and one or more personal services for adult resident clients, not related to the owner or administrator by blood or marriage, who require such services.

Day Care Centers – A place licensed by the State, if applicable, where daytime care, which may include some instruction, is provided to 6 or more children or adults who do not reside in the facility, and who are not the legal wards or foster children or relatives of the attendant adult within an occupied residence.

Day Care Home [small] – A facility in a dwelling unit; licensed by the State, if applicable; providing care for six or fewer children or adults who do not reside in the facility, are present during daytime hours, and do not stay overnight; and which may include some instruction.

Detoxification Center – Detoxification center means a medical facility open twenty-four hours a day meeting standards comparable to hospital or nursing home. Such facility shall be for the temporary emergency shelter of intoxicated persons or those persons suffering from alcoholism, drug abuse or other similar condition, for the purpose of detoxification.

Family – One or more persons occupying a single dwelling unit, provided that unless all members are related by blood or marriage or adoption, no such family shall contain over five persons, but further provided that domestic servants employed or living on the premises may be housed on the premises without being counted as family or families.

Group Homes – A building except for congregate housing, used as a dwelling for a group of unrelated persons living together as a unit under the supervision of a local or state agency as defined by the Fair Housing Act and enforced by the United States Department of Justice. Such facility includes the term foster care home.

Health Care Facility – A facility or institution, whether public or private, principally engaged in providing services for health maintenance and the treatment of mental or physical conditions. Health Care Facilities include general or specialty hospitals, public health centers, diagnostic centers, treatment centers, rehabilitation centers, extended care facilities, long-term care facilities, residential health care facilities, outpatient clinics and dispensaries. They may include laundries, cafeterias, gift shops, laboratories and medical offices as accessory uses.

Independent Living Facility – A residential development that is limited to occupancy by elderly persons and/or persons with disabilities. Such a facility shall provide: (a) dwelling units with complete kitchen facilities; (b) supportive services such as meals, personal emergency response systems, recreation and transportation services, and (c) design features such as wider doorways and hallways, accessible-ready bathrooms and lower light switches.

Residential Development – buildings for residential use such as attached and detached single-family dwellings, apartment buildings, condominiums, townhouses, cottages, etc. and their associated outbuildings such as garages, storage buildings, gazebos, etc. Residential development includes group homes as defined in this chapter.

Single-Family Residential – Any development where: no building contains more than one dwelling unit, every dwelling unit is on a separate lot, and where no lot contains more than one dwelling unit [exception: rental studios and apartments]. Such uses include group homes as defined in this chapter.

Development Application and Process

Article 16, Application Review and Approval Requirements, of the Land Development Regulations specifies the requirements and process for approval of development projects. Generally, except for single-family homes, all development requires approval of a “Development Plan”. The Land Development Regulations require that prior to issuance of a building permit for projects requiring approval of a development plan, applicants must provide required information and the various review departments must make findings of compliance with applicable regulations.

Development and Permitting Fees

For development plan reviews, there is a fee of \$1,500. For permits on new construction, a minimum fee is \$200, and permits are calculated at \$50.00 plus \$7.00 per \$1,000 of construction value.

***Conclusions** - The City of Punta Gorda Code of Ordinances and Zoning Regulations implement the policy guidance of the comprehensive plan. The zoning districts provide a wide range of housing types for affordability, and include limitations on uses such as Group Homes. In that regard, these regulations include the following:*

1. Allowance for accessory units as a permitted use in any residential zoning district;
2. Deferral of impact fees provided the project remains affordable, and thus can become a permanent waiver of these fees;
3. Wide range of lot sizes, and in several instances requires no minimum lot size;
4. Density bonuses and transfer of development rights to encourage affordable housing and elderly housing;
5. Allowance for mixed uses in commercial areas;
6. Allowance for group homes in all residential district;

In addition to the above, where many jurisdictions regulate minimum living area in their zoning regulations, the City of Punta Gorda zoning includes no arbitrary minimum living area requirements. There are no obvious impediments to fair housing in these regulations.

***Conclusions** - The City of Punta Gorda Code of Ordinances and Zoning Regulations includes incentives for affordable housing and elderly housing through bonus densities and transfer of development rights, and as such has addressed this previously identified impediment.*

SECTION 4 CURRENT FAIR HOUSING PROFILE

The purpose of this section is to provide a summary of the current state of fair housing in Punta Gorda. This includes information on the number of fair housing complaints received, HUD fair housing/sanctions/law suits, and community outreach on the subject of fair housing.

4.1 – CITY FAIR HOUSING PROGRAM

- Punta Gorda has a Fair Housing Ordinance
- The City Commission has officially declared April as Fair Housing month
- The City provides brochures and information regarding Fair Housing in multiple languages
- Anti-Displacement Act
- Affordable Housing Incentives

4.2 - PUNTA GORDA PUBLIC HOUSING

The Punta Gorda Public Housing Authority (PGHA) has a number of programs for low income persons, families and special needs groups. The PGHA was decimated by Hurricane Charlie in 2004 when all units were destroyed except for Oak Tree Village and is still working to recover from the loss of units. The following is a listing of the units and program commitments. The PGHA is the only entity in the County for these types of programs.

- At present PGHA is responsible for approximately 341 Section 8 vouchers in Charlotte County.
- PGHA has 115 units within the City.
- The PGHA manages 30 public housing units at the Oak Tree Village.
- PGHA is responsible for the long term management of 4 affordable units located at Fitzhugh Commons. This property was developed by the Punta Gorda Development Corporation, a Non-Profit Affiliate of the PGHA.
- Gulf Breeze Apartments consists of 171 units and the PGHA provides tenants for the property. There are 85 Tax Credit Units and 85 Public Housing Units currently at the site.
- The PGHA recently opened the application process for their units and had over 800 people sign up. A lottery was held for the future possible 550 spaces. These entries then established a new waiting list for opening.
- The PGHA applied for and was granted funding from the Florida Housing Finance Corporation for a one year program. This allows PGHA to assist eligible people/households for no more than one year with temporary assistance.

- The Shelter Care Program is run in cooperation with two mental health organizations in the county. The organizations assist this special needs population with obtaining housing. The recipient must be under the care of one of the mental health organizations. The case managers help the individuals to obtain housing. This program is received as a lump sum funding and 13 to 18 households have benefited.

4.3 - HUD SANCTIONS

There are no HUD sanctions against Punta Gorda.

4.4 - LAWSUITS

There are no fair housing lawsuits against Punta Gorda.

4.5 - FAIR HOUSING COMPLAINTS

Four sources were examined to determine the number of discrimination cases in the City of Punta Gorda. These sources include;

- The City of Punta Gorda
- Charlotte County
- State of Florida Commission on Human Relations
- Rural Legal Aid of Florida

Discussions with representatives of the City of Punta Gorda, Charlotte County and Legal Aid have revealed that no housing complaints have been received over the past five years. No records exist for any complaints prior to that time.

The Florida Commission on Human Relations does have records of housing complaints. However, this data is for the entire County and they could not provide a breakdown by location. The record of housing complaints indicates that only one case has proceeded to action by the Commission. The primary causes of housing complaints are from the disabled population.

**TABLE 4.1
FAIR HOUSING COMPLAINTS IN CHARLOTTE COUNTY**

Filing Date	Charge Description	Closure Date	Closure Code	Basis Description
1/7/2010	Housing	3/2/2010	Successful Conciliation	Disability Mental
5/6/2010	Housing	6/6/2010	No Cause	Disability Physical
12/27/2011	Housing	3/1/2012	Withdrawal with Benefits	Disability Physical
1/9/2012	Housing	5/16/2012	Reasonable Cause	Disability Mental
1/6/2012	Housing	7/17/2012	No Cause	Disability Physical
5/6/2013	Housing	10/2/2013	Successful Conciliation	Sex, male
3/18/2013	Housing	1/9/2014	No Cause	Race, Black and National Origin
1/22/2014	Housing	3/25/2014	Withdrawal with Benefits	Disability Physical, Mental

Source: Florida Commission on Human Relations

4.6 - PUBLIC INPUT

A Public Meeting was held at the Cooper Street Recreation Center on September 18, 2014 and approximately 35 people attended. The points that were made regarding impediments to fair housing were the following:

- Housing is denied due to credit reports/history. This is especially true regarding large families
- A family can be denied housing due to the husband having a poor credit history while the wife’s credit is fine. The development will not approve the rental/lease on the female’s credit history/report alone.
- More units are needed in the affordable housing market.
 - There is a lack of units for those who are working on the lower end of the pay scale.
 - Housing prices are increasing, all the time while wages are not.
 - The units that were lost with the Hurricane have not been replaced.
- There is a gap between the lower and middle income groups. Middle income groups are struggling, but are not eligible for subsidies.
- The rental market is almost non-existent.
- Although the City provides for no minimum housing square footage or lot size, developers are not producing these smaller more affordable units.
- Funding for the affordable units is not available.
- Need to have a centralized registry or informational point regarding rental availability.
- There is a need to educate the public and the housing providers on the fair housing guidelines.
- One of the biggest impediments to housing and all self-sufficiency is the lack of transportation. There is no public transportation.

- There is a program run by the County that offers a ride for \$1, but that program is for the transportation disadvantaged. Low income persons can qualify.
- The only jobs available are low paying service jobs and that does not allow a family to have decent, affordable housing in the City.
- Need to get information to people who are not attending meetings and are renters.
 - Need to establish a plan of how to get to this market (renters) and get them involved or participating in housing issues.
 - Possible contacts and ways to reach this population is through the schools, PTA, the posting of HUD posters and the distribution of informational pamphlets.
 - Partnering with other community or faith based organizations, such as Churches, Fraternal organizations, Community Development Organizations.

4.7 – DISPROPORTIONATE CONDITIONS IN HOUSING

The HUD definition of disparity is where one race or ethnicity has a rate of Cost Burden that is at least 10% higher than the rate for the entire population. Cost Burden figures by race are only available for the entirety of Charlotte County and do not exist for Punta Gorda individually.

As seen in Table 4.2 below, 29.3% of Charlotte County renters are calculated to be Cost Burdened (between 30% and 50% of Household Income for rent). Hispanics are Cost Burdened at a rate 11% higher than the average for the County (40.3%). A disparity for this group then exists. In the Severely Cost Burdened category (over 50% of Household Income) there is no disparity among Race or Ethnic Groups.

**TABLE 4.2
COST BURDEN FOR RENTERS BY RACE**

Percent Cost Burdened	Total County		White		African American		Hispanic	
	Number	Percent	Number	Percent	Number	Percent	Number	Percent
Less than 30%	5,455	40.1%	4,789	39.4%	432	45.3%	235	33.6%
30-49.9%	3,983	29.3%	3,522	29.0%	293	30.7%	282	40.3%
50% or more	3,330	24.5%	3,098	25.5%	169	17.7%	135	19.3%
Not computed	846	6.2%	742	6.1%	60	6.3%	48	6.9%
Total	13,614	100.0%	12,151	100.0%	954	100.0%	700	100.0%

Source: 2006-2010 American Community Survey

**SECTION 5
HOME MORTGAGE DISCLOSURE ACT**

5.1 - INTRODUCTION

The Federal Financial Institutions Examination Council (FFIEC) gathers data on home mortgage activity from the federal agencies that regulate the home mortgage industry. The data contain variables that facilitate analysis of mortgage lending activity, such as race, income, census tract, loan type, and loan purpose.

**TABLE 5.1
MORTGAGE DENIALS BY CENSUS TRACT**

Census Tract	Applications Received	Applications Denied	Percent Denied
103.01	81	32	39.5%
103.02	32	23	71.9%
104.01	159	36	22.6%
104.02	104	25	24.0%
104.03	96	27	28.1%
104.04	221	51	23.1%
105.01	86	30	34.9%
105.02	225	59	26.2%

Source: FFIEC Mortgage Data, 2012

There is considered to be a systemic problem when one race is denied mortgages at a rate 10% higher than the overall City average. As seen in Table 5.2 below, no race/ethnicity falls within this threshold.

**TABLE 5.2
MORTGAGE DENIALS BY RACE**

	Applications Received	Applications Denied	Percent Denied
White - Non Hispanic	452	82	18.1%
Black	15	3	20.0%
Hispanic	31	9	29.0%
Minority (including Black and Hispanic)	62	12	19.4%
Total City-Wide	584	111	19.0%

Source: FFIEC Mortgage Data, 2012

SECTION 6 ANALYSIS OF IMPEDIMENTS

6.1 – HOUSING MARKET

Affordability

76.2 percent of existing single family homes are affordable to a family on a median income. That ranks 94th out of 225 metropolitan statistical areas in the country, and 27th out of 64 metropolitan statistical areas in the South Region. (Source: National Association of Home Builders/Wells Fargo Housing Opportunity Index 2nd Quarter, 2014)

The National Association of Realtors® (NAR) affordability index measures whether or not a typical family could qualify for a mortgage loan on a typical home. A typical home is defined as the national median-priced, existing single-family home as calculated by NAR. The typical family is defined as one earning the median family income as reported by the U.S. Bureau of the Census. The prevailing mortgage interest rate is the effective rate on loans closed on existing homes from the Federal Housing Finance Board. These components are used to determine if the median income family can qualify for a mortgage on a typical home. The Affordability Index is provided for the entire MSA and is 216.7 for 2013, a decline from the 2012 index of 262.8.

To interpret the indices, a value of 100 means that a family with the median income has exactly enough income to qualify for a mortgage on a median-priced home. An index above 100 signifies that family earning the median income has more than enough income to qualify for a mortgage loan on a median-priced home, assuming a 20 percent down payment. For example, a composite HAI of 120.0 means a family earning the median family income has 120% of the income necessary to qualify for a conventional loan covering 80 percent of a median-priced existing single-family home. An increase in the HAI, then, shows that this family is more able to afford the median priced home.

The calculation assumes a down payment of 20 percent of the home price and it assumes a qualifying ratio of 25 percent. That means the monthly Principal and Interest (P&I) payment cannot exceed 25 percent of the median family monthly income.

**TABLE 6.1
MEDIAN SINGLE FAMILY HOME SALES PRICES**

	Punta Gorda MSA	Florida	United States
August 2014	\$139,900	\$181,000	\$220,600
July 2014	\$151,950	\$185,000	\$223,900
June 2014	\$156,425	\$185,000	\$224,300
May 2014	\$157,000	\$180,000	\$213,600
April 2014	\$149,000	\$175,000	\$201,100
March 2014	\$142,500	\$173,000	\$198,200
February 2014	\$139,000	\$165,000	\$189,200
January 2014	\$135,000	\$162,500	\$188,900

Foreclosures

Current statistics reveal that the number of properties under foreclosure proceedings in Punta Gorda equals 653, which is 5.6% of all units in the community. This percentage indicates that impacts of the Great Recession are still present.

Sales and Listings

Sales of new units have increased by approximately 10% over 2013. The bulk of these sales 78% are for single family homes. Detailed Housing Sales data is found in Appendix E.

MLS listings in the area are typically a 4 month supply, which indicates that the market is not turning over rapidly. This turnover rate is an improvement over previous years.

6.2 - NEWSPAPERS

Newspapers are one of the direct sources of information and contact regarding the dissemination of Fair Housing regulations to the general public. HUD has produced a Fair Housing disclaimer that is designed to be published in newspapers that publish Real Estate ads in any local community. This disclaimer is usually printed in the Real Estate section or found on-line at the newspaper’s website. Most newspapers only publish the disclaimer in the Sunday Real Estate section since it typically has the largest amount of ads.

The Punta Gorda Herald-Tribune and the Charlotte Sun are the primary local newspapers in the area. In addition, the Sarasota Sun also serves the community.

After checking the websites for these entities, it was discovered that the HUD disclaimer is not contained on the site, in either the Real Estate section or in any other area.

6.3 - BOARD OF REALTORS

Many of the individual real estate firms in the Punta Gorda area provide the HUD disclaimer on their websites. They also are very prudent about distribution of the printed material regarding the subject.

The Port Charlotte, Punta Gorda, North Port Association of Realtors also provides access to the HUD Fair Housing materials on their website. All brochures, posters and printed documents are available for download in multiple languages. However, the Board does not offer classes to members regarding Fair Housing nor does it engage in any community outreach. The national Board of Realtors has extensive materials and programs available to its member organizations. These programs can be readily adapted for use in Punta Gorda.

6.4 - APARTMENT ASSOCIATION

The Southwest Florida Apartment Association has classes to educate their membership regarding Fair Housing. These classes are taught by professionals in the field and offer information regarding the rights of tenants and prospective tenants.

6.5 - PUBLIC POLICIES

In Section 3 of this report, a detailed analysis of the public policies, codes and ordinances of the City Punta Gorda was conducted. The result of the analysis is a conclusion that the current policies are not an impediment to Fair Housing.

This analysis also examined the “*City of Punta Gorda, Florida Analysis of Impediments to Fair Housing*” completed in April 2013. This interim report identified issues related to the Land Development Codes that existed at that time. These codes established a minimum dwelling unit size and lot sizes for residential units in the City. These codes have since been modified by the City making the development regulations in the City more compliant with Federal regulations regarding the accessibility of affordable housing for all citizens.

SECTION 7
IDENTIFICATION OF IMPEDIMENTS

In current examination of impediments to fair housing choice, a few issues were found that the City can easily address.

Those issues were:

1. The City has adopted a formalized policy on the receipt of fair housing inquiries or complaints and this policy is published on the City's webpage. The information is complete, however anyone seeking this material would need to know where to search for the policy and contact telephone number.
2. Transportation and access to public transit was found to be an impediment to finding housing.
3. During investigation of the locally published newspapers, with advertising for real estate for sale or rent, no HUD disclaimer could be found
4. Lack of affordable housing units, based on community opinion.
5. The local realtors, while publishing HUD Fair Housing information on their website, do not hold classes for their members regarding Fair Housing and do not have an outreach program in the community to educate the residents.
6. There appears to be a lack of community knowledge of HUD Fair Housing initiatives and policy.

SECTION 8
RECOMMENDATIONS FOR CORRECTION OF THE IMPEDIMENTS

1. Add a link on the City's website main page or in the Questions section to direct anyone seeking to file a housing discrimination complaint to the proper information.
2. In regards to transportation, there appears to be a need for education, outreach and publication regarding the currently available ride/transportation programs. The public does not appear to be fully aware of transportation programs that could assist the transportation disadvantaged-low income population. Additional dissemination of this information should be undertaken.
3. The City should request that the local newspapers insure that the HUD disclaimer regarding Fair Housing is published on their website and/or in print.
4. The City has made strides towards the inventory of affordable housing stock, by changes in their codes and ordinances and encouragement of economic development incentives. The City needs to continue on this path.
5. A partnership with the local Board of Realtors could be explored regarding the community education of the target population. This program should be initiated in the Elementary Schools and possibly expanded to additional grades. Use of existing materials will enable this program to be developed expeditiously.
6. Expand the distribution of Fair Housing materials throughout the community through the following.
 - a. The posting of HUD posters at after school care sites, parks and recreation centers, public housing sites, local houses of faith and schools
 - b. Having HUD/City of Punta Gorda Fair Housing pamphlets/written handouts available at various publically accessed sites, such as libraries, City Hall, other government building and centers.
 - c. Make sure the City website has the information available to the public

APPENDIX A
FAIR HOUSING ORDINANCE

CITY OF PUNTA GORDA

ORDINANCE NO. 1764-13

AN ORDINANCE OF THE CITY OF PUNTA GORDA, FLORIDA, REPEALING ORDINANCE #600-80 AND REWRITING IN ITS ENTIRETY CHAPTER 9B, ARTICLE II, OF THE PUNTA GORDA CODE, DECLARING IT TO BE THE POLICY OF THE CITY OF PUNTA GORDA TO ELIMINATE DISCRIMINATION IN HOUSING ON THE BASIS OF RACE, COLOR, ANCESTRY, NATIONAL ORIGIN, RELIGION, SEX, MARITAL STATUS, FAMILIAL STATUS, HANDICAP OR AGE; PROVIDING DEFINITIONS; DESIGNATING AS UNLAWFUL CERTAIN DISCRIMINATORY PRACTICES IN THE SALE OR RENTAL OF HOUSING, AS WELL AS IN ADVERTISING IN CONNECTION THEREWITH, IN THE FINANCING OF HOUSING, AND IN BROKERAGE SERVICES RELATED TO EXCEPTIONS; PROVIDING FOR AN ADMINISTRATOR TO BE DESIGNATED BY THE CITY MANAGER AND PRESCRIBING THE GENERAL POWERS AND DUTIES OF SUCH ADMINISTRATOR, PRESCRIBING ACTION UPON A DETERMINATION OF PROBABLE CAUSE, AND AUTHORIZING THE PROMULGATION OF FORMS AND REGULATIONS; MAKING PROVISIONS FOR THE FILING OF COMPLAINTS AND RESPONSES THERETO, AND THE PROCESSING THEREOF BY THE ADMINISTRATOR; PROVIDING FOR ADDITIONAL REMEDIES; PROVIDING FOR PROHIBITING UNTRUTHFUL COMPLAINTS OR FALSE TESTIMONY; PROVIDING FOR PENALTIES FOR VIOLATION OF SUCH CODE; PROVIDING FOR CONFLICT AND SEVERABILITY; AND PROVIDING AN EFFECTIVE DATE.

WHEREAS, by the adoption of Ordinance #600-80 on August 6, 1980, the City of Punta Gorda, Florida declared it to be the policy of the City of Punta Gorda in the exercise of its police power for the public safety, public health and general welfare to assure equal opportunity to obtain adequate housing by all persons and to eliminate discrimination in housing within its jurisdiction; and

WHEREAS, Ordinance #600-80 is codified as Chapter 9B, Article II, consisting of Sections 11 through 18, of the Punta Gorda Code; and

WHEREAS, the U.S. Department of Housing and Urban Development (HUD) requires jurisdictions receiving entitlement of Community Development Block Grant (CDBG) Program funds to complete an analysis every 5 years to identify impediments that prevent the national fair housing laws from being observed, the reasons for said impediments, and resources available to resolve any issues; and

WHEREAS, as a part of its analysis, the City of Punta Gorda is also required to review its Fair Housing policy to ensure compliance with the current Fair Housing Act and HUD regulations;

NOW, THEREFORE, BE IT ENACTED BY THE CITY COUNCIL OF THE CITY OF PUNTA GORDA, FLORIDA THAT:

- I. Ordinance #600-80 adopted on August 6, 1980 is hereby repealed.
- II. Chapter 9B, Article II, is hereby rewritten in its entirety to read as follows:

Section 9B-11. DECLARATION OF POLICY.

It is the policy of the City of Punta Gorda, Florida, in keeping with the laws of the United States of America and the spirit of the Constitution of the State of Florida, to promote through fair, orderly and lawful procedure the opportunity for each person so desiring to obtain housing of such person's choice in this jurisdiction without regard to race, color, ancestry, national origin, religion, sex, marital status, familial status, handicap or age, and, to that end, to prohibit discrimination in housing by any person.

Section 9B-12. DEFINITIONS.

The terms as used herein shall be defined as follows:

- (a) *Administrator*: That person appointed by the City Manager pursuant to Section 15 hereof.
- (b) *Age*: Unless the context clearly indicates otherwise, the work age as used herein shall refer exclusively to persons who are 18 years of age or older.
- (c) *Discriminatory Housing Practice*: An act that is unlawful under Section 13 hereof.
- (d) *Family*: One or more persons living together as a single housekeeping unit in a dwelling.
- (e) *Housing or Housing Accommodation*: Any building, structure, or portion thereof, mobile home or trailer, or other facility which is occupied as, or designed or intended for occupancy as, a residence by one or more families, and any vacant land which is offered for sale or lease for the construction or location thereon of any such building, structure, or portion thereof, mobile home or trailer or other facility.
- (f) *Lending Institution*: Any bank, insurance company, savings and loan association or any other person or organization regularly engaged in the business of lending money, guaranteeing loans, or sources of credit information, including, but not limited to credit bureaus.
- (g) *Owner*: Any person, including, but not limited to a lessee, sublease, assignee, manager, or agent, and also including the City of Punta Gorda, Florida and the City of Punta Gorda Housing Authority and its departments or other subunits, having the right of ownership or possession or the authority to sell or lease any housing accommodation.
- (h) *Person*: One or more individuals, corporations, partnerships, associations, labor organizations, legal representatives, mortgage companies, joint stock companies, trusts, unincorporated organizations, or public corporations, including, but not limited to the the City of Punta Gorda, Florida and the City of Punta Gorda Housing Authority or any department or subunit thereof.

- (i) *Real Estate Agent*: Any real estate broker, any real estate salesperson, or any other person, employee, agent, or otherwise, engaged in the management or operation of any real property,
- (j) *Real Estate Broker or Salesperson*: A person, whether licensed or not, who, for or with the expectation of receiving a consideration, lists, sells, purchases, exchanges, rents, or leases real property, or who negotiates or attempts to negotiate any of these activities, or who holds himself or herself out as engaged in these activities, or who negotiates or attempts to negotiate a loan secured or to be secured by mortgage or other encumbrance upon real property, or who is engaged in the business of listing real property in a publication; or a person employed by or acting on behalf of any of these.
- (k) *Real Estate Transaction*: Includes the sale, purchase, exchange, rental or leases of real property, and any contract pertaining thereto.
- (l) *Rent*: Includes leases, sublease, assignment and/or rental, including any contract to do any of the foregoing, or otherwise granting for a consideration the right to occupy premises that are not owned by the occupant.
- (m) *Respondent*: Any person against whom a complaint is filed pursuant to this ordinance.
- (n) *Sale*: Includes any contract to sell, exchange, or to convey, transfer or assign legal or equitable title to, or a beneficial interest in, real property.

Section 9B-13.

UNLAWFUL HOUSING PRACTICES.

- (a) Unlawful housing practices: Sale or rental and advertising in connection therewith. Except as provided in Section 14 hereof, it shall be unlawful and a discriminatory housing practice for an owner, or any other person engaging in a real estate transaction, or for a real estate broker, as defined in this ordinance, because of race, color, ancestry, national origin, religion, sex, marital status, familial status, handicap or age:
 - (1) To refuse to engage in a real estate transaction with a person or to otherwise make unavailable or deny housing to any person.
 - (2) To discriminate against a person in the terms, conditions or privileges of a real estate transaction or in the furnishing of facilities or services in connection therewith.
 - (3) To refuse to receive or to fail to transmit a bona fide offer to engage in a real estate transaction from a person.
 - (4) To refuse to negotiate for a real estate transaction with a person.
 - (5) To represent to a person that housing is not available for inspection, sale, rental or lease when, in fact, it is so available, or to fail to bring a property listing to such person's attention, or to refuse to permit him or her to inspect the housing.
 - (6) To steer any person away from or to any housing.

- (7) To make, print, publish, circulate, post or mail, or cause to be made, printed, published or circulated, any notice, statement, advertisement or sign, or to use a form of application or photograph for a real estate transaction or, except in connection with a written affirmative action plan, to make a record or oral or written inquiry in connection with a prospective real estate transaction, which indicates directly or indirectly an intent to make a limitation, specification, or discrimination with respect thereto.
- (8) To offer, solicit, accept, use or retain a listing of housing with the understanding that a person may be discriminated against in a real estate transaction or in the furnishing of facilities or services in connection therewith.
- (9) To induce or attempt to induce any person to transfer an interest in any housing by representations regarding the existing or potential proximity of housing owned, used or occupied by any person protected by the terms of this ordinance.
- (10) To make any misrepresentations concerning the listing for sale or rental, or the anticipated listing for sale or rental, or the sale or rental of any housing in any area in the City of Punta Gorda, Florida, for the purpose of inducing or attempting to induce any such listing or any of the above transactions.
- (11) To retaliate or discriminate in any manner against any person because of his or her opposing a practice declared unlawful by this ordinance, or because he or she has filed a complaint, testified, assisted or participated in any manner in any investigation, proceeding or conference under this ordinance.
- (12) To aid, abet, incite, compel or coerce any person to engage in any of the practices prohibited by the provisions of this ordinance, or to obstruct or prevent any person from complying with the provisions of this ordinance, or any conciliation agreement entered into there under.
- (13) By canvassing to compel any unlawful practices prohibited by the provisions of this ordinance.
- (14) Otherwise to deny to, or withhold, any housing accommodations from a person.
- (15) To promote, induce, influence or attempt to promote, induce or influence by the use of postal cards, letters, circulars, telephone, visitation or any other means, directly or indirectly, a property owner, occupant, or tenant to list for sale, sell, remove from, lease, assign, transfer, or otherwise dispose of any housing by referring as a part of a process or pattern of indicating neighborhood unrest, community tension, or fear of racial, color, religious, nationality or ethnic change in any street, block, neighborhood or any other area, to the race, color, religion, neighbors, tenants or other prospective buyers of any housing.
- (16) To place a sign or display any other devise either purporting to offer for sale, lease, assignment, transfer or other disposition or tending to lead to the belief that a bona fide offer is being made to sell, lease, assign, transfer or otherwise dispose of any housing that is not in fact available or offered for sale, lease, assignment, transfer or other disposition.

- (b) Unlawful housing practices: Financing. It shall be unlawful and a discriminatory housing practice for any lending institution, to deny a loan or other financial assistance to a person applying therefore for the purpose of purchasing, constructing, improving, repairing or maintaining housing, or to discriminate against such person in the fixing of the amount, interest rate, duration, or other terms or conditions of such loan or other financial assistance, because of the race, color, ancestry, national origin, religion, sex, marital status, familial status, handicap or age of such person or of any person associated with such person in connection with such loan or other assistance, or of the present or prospective owners, lessees, tenants or occupants of the housing in relation to which such loan or other financial assistance is to be made or given; provided that nothing contained in this subsection shall impair the scope or effectiveness of the exceptions contained in Section 14 of this ordinance.
- (c) Unlawful housing practices: Brokerage Services. It shall be unlawful and a discriminatory housing practice to deny any person access to or membership or participation in any multiple listing service, real estate brokers organization or other service, organization, or facility related to the business of selling, or renting housing, or to discriminate against such person in the terms or conditions of such access, membership or participation because of race, color, ancestry, national origin, religion, sex, marital status, familial status or age.

Section 9B-14.

EXEMPTIONS AND EXCEPTIONS.

- (a) Nothing contained in this Section 14 shall prohibit a religious organization, association, or society, or any nonprofit charitable or educational institution or organization operated, supervised or controlled by or in conjunction with a religious organization, association, or society, from limiting or from advertising the sale, rental or occupancy of housing which it owns or operates for other than a commercial purpose to persons of the same religion, or from giving preference to such persons. Nor shall anything in this ordinance prohibit a private club not in fact open to the public, which as an incident to its primary purpose or purposes, provides lodgings which it owns or operates for other than a commercial purpose, from limiting the rental or occupancy of such lodgings to its members or from giving preference to its members.
- (b) Nothing in Section 13 hereof, other than subsection (7) of subsection (a) thereof, shall apply to:
- (1) Any single-family house sold or rented by an owner: provided, that such private individual owner does not own more than three such single family houses at any one time; provided, further, that in the case of the sale of any such single family house by a private individual owner not residing in such house at the time of such sale or who was not the most recent resident of such house prior to such sale, the exemption granted by this subsection shall apply only with respect to one such sale within any twenty-four month period; provided, further, that it does not own any interest in, nor is there owned or reserved on such owner's behalf, under any express or voluntary agreement, title to or any rights to all or a portion of the proceeds from the sale or rental of, more than three such single-family houses at any one time; provided, further, that the owner sells or rents such housing (1) without the use in any manner of the sales or rental facilities or the sales or rental services of any real estate broker, agent, or salesperson, or of such facilities or services of any person in the business of selling or renting housing, or of any employee or agency of any such broker, agent, salesperson, or person and (2) without the publication, posting, or mailing, after notice, of any advertisement or written notice in violation of subsection (7) of subsection (a) of Section 13 hereof, but nothing in this provision shall

prohibit the use of attorneys, escrow agents, abstracters, title companies, and other such professional assistance as necessary to perfect or transfer the title; or

- (2) Rooms or units in housing containing living quarters occupied or intended to be occupied by no more than four families living independently of each other, if the owner actually maintains and occupies one of such living quarters as such owner's residence, provided that the owner sells or rents such rooms or units (1) without the use in any manner of the sales or rental services of any real estate broker, agent or salesperson, or of such facilities or services of any person in the business of selling or renting housing, or of any employee or agency of any such broker, agent salesperson, or person and (2) without the publication, posting or mailing, after notice in violation of subsection (7) of subsection (a) of Section 13 hereof, but nothing in this provision shall prohibit the use of attorneys, escrow agents, abstracters, title companies, and other such professional assistance as necessary to perfect or transfer the title.
- (c) For the purpose of this subsection a person shall be deemed to be in the business of selling or renting housing if:
- a. He or she has, within the preceding twelve months, participated as principal, other than in the sale of his or her own personal residence, in providing sales or rental facilities or sales or rental services in three or more transactions involving the sale or rental of any housing or any interest therein; or
 - b. He or she has, within the preceding twelve months, participated as agent, other than in the sale of his or her own personal residence, in providing sales or rental facilities or sales or rental services in two or more transactions involving the sale or rental of any housing or any interest therein; or
 - c. He or she is the owner of any housing designed or intended for occupancy by, or occupied by, five or more families.
- (2) Nothing in Section 13 hereof shall be construed to:
- a. Bar any person from restricting sales, rentals, leases or occupancy, or from giving preference, to persons of a given age for bona fide housing intended solely for the elderly or bona fide housing intended solely for minors.
 - b. Make it an unlawful act to require that a person have legal capacity to enter into a contract or lease.
 - c. Bar any person from advertising or from refusing to sell or rent any housing which is planned exclusively for, and occupied exclusively by, individuals of one sex, to any individual of the opposite sex.
 - d. Bar any person from selling, renting or advertising any housing which is planned exclusively for, and occupied exclusively by, unmarried individuals to unmarried individuals only.

- e. Bar any person from advertising or from refusing to sell or rent any housing which is planned exclusively for married couples without children or from segregating families with children to special units of housing.
- f. Bar any person from refusing a loan or other financial assistance to any person whose life expectancy, according to generally accepted mortality tables, is less than the term for which the loan is requested.

Section 9B-15.

ADMINISTRATOR AUTHORITY AND RESPONSIBILITIES.

- (a) **City Manager to Appoint.** The authority and responsibility for administering this ordinance shall be vested in the City Manager who shall appoint an administrator.
- (b) **General Powers and Duties.** The administrator shall:
 - a. Receive written complaints as hereinafter provided in Section 16 relative to alleged unlawful acts under this ordinance when a complaint seeks the administrator's good offices to conciliate.
 - b. Upon receiving written complaint, make such investigations as the administrator deems appropriate to ascertain facts and issues.
 - c. Utilize methods of persuasion, conciliation, and mediation or information adjustment of grievances.
 - d. Establish, administer or review programs at the request of the City Manager and make reports on such programs to the City Manager.
 - e. Bring to the attention of the City Manager items that may require further notice or action to resolve.
 - f. Render to the City Manager annual written reports of his or her activities under the provisions of this ordinance along with such comments and recommendations as he or she may choose to make.
 - g. Cooperate with and render technical assistance to federal, state, local and other public and private agencies, organizations and institutions which are formulating or carrying on programs to prevent or eliminate the unlawful discriminatory practices covered by the provisions of this ordinance.
- (c) **Determination of Probable Cause.** If after fully processing the complaint in the manner hereafter provided, the administrator determines that there is probable cause to believe that there has been a violation of the provisions of this ordinance, the administrator shall refer the matter, along with the facts he or she has gathered in the investigations, to the proper county, state or federal authorities for appropriate legal action.
- (d) **Promulgation of Forms and Regulations.** The administrator shall promulgate, publish and distribute the necessary forms, rules and regulations to implement the provisions of this ordinance.

Section 9B-16.

COMPLAINTS.

- (a) A person who claims that another person has committed a discriminatory housing practice against him or her may report that offense to the administrator by filing an informal complaint within forty-five (45) days after the date of the alleged discriminatory housing practice and not later.
- (b) The administrator shall treat a complaint referred by the Secretary of Housing and Urban Development or the Attorney General of the United States under the Fair Housing Act of 1968, Public Law 90-284, as an informal complaint filed under subsection (1).
- (c) An informal complaint must be in writing, verified or affirmed, on a form to be supplied by the administrator and shall contain the following:
 - (1) Identity and address of the respondent.
 - (2) Date of offense and date of filing the informal complaint.
 - (3) General statement of facts of the offense including the basis of the discrimination (race, color, ancestry, national origin, religion, sex, marital status, familial status, handicap or age).
 - (4) Name and signature of the complainant.
- (d) Each complaint shall be held in confidence by the administrator unless and until the complainant and the respondent(s) consent in writing that it shall be made public.
- (e) Within fifteen (15) days after the filing of the informal complaint, the administrator shall transmit a copy of the same to each respondent named therein by certified mail, return receipt requested. Thereupon, the respondent(s) may file a written, verified informal answer to the informal complaint within twenty (20) days of the date of the receipt of the informal complaint.
- (f) An informal complaint or answer may be amended at any time, and the administrator shall furnish a copy of each amended informal complaint or answer to the respondent(s) complaint, respectively, as promptly as practicable.
- (g) The administrator shall assist complainants or respondents when necessary in the preparation and filing of informal complaints or answers or any amendments thereto.
- (h) The administrator shall advise complainants of their rights and options provided in Section 760.34, Florida Statutes.

Section 9B-17.

PROCESSING COMPLAINTS.

- (a) Within thirty (30) days after the filing of an informal complaint, the administrator shall make such investigation as is deemed appropriate to ascertain facts and issues. If the administrator shall deem that there are reasonable grounds to believe that a violation has occurred and can be resolved by conciliation, the administrator shall attempt to conciliate the matter by methods of initial conference and persuasion with all interested parties such representatives as the parties

may choose to assist them. Conciliation conferences shall be informal and nothing said or done in the course of the informal conference with the individuals to resolve the dispute may be public or used as evidence in a subsequent proceeding by either party without the written consent of both the complainant and the respondent(s). The administrator or employee of the administrator who shall make public any information in violation of this provision shall be deemed guilty of a violation of a city ordinance and shall be subject to penalty as set forth in Section 21 of this ordinance.

- (b) If the parties desire to conciliate, the terms of the conciliation shall be reduced to writing in the form approved by the administrator and must be signed and verified by the complainant and respondent(s) and approved by the administrator. The conciliation agreement shall be for conciliation purposes only and shall not constitute an admission by any party that the law has been violated.
- (c) If the administrator deems that there is not probable cause to believe that the alleged discriminatory housing practice has been committed, the administrator shall take no further action with respect to the alleged offense.
- (d) If the administrator, with respect to any matter involves a contravention of this ordinance by failure to conciliate a complaint after the parties, in good faith, have attempted such conciliation; or determining that the violation alleged in the complaint cannot be resolved by conciliation, the administrator shall notify both the complainant and the respondent(s) within thirty (30) days of the failure or the determination, and then shall proceed as provided in Subsection (c) of Section 15 herein above.

Section 9B-18. ADDITIONAL REMEDIES.

The procedure prescribed by this ordinance does not constitute an administrative prerequisite to another action or remedy available under other law. Further, nothing in this ordinance shall be deemed to modify, impair or otherwise affect any right or remedy conferred by the Constitution or laws of the United States or the State of Florida, and the provisions of this ordinance shall be in addition to those provided by such other laws.

Section 9B-19. EDUCATION AND PUBLIC INFORMATION.

The administrator may conduct educational and public informational activities that are designed to promote the policy of this ordinance.

Section 9B-20. UNTRUTHFUL COMPLAINTS OR TESTIMONY.

It shall be a violation of this ordinance for any person knowingly and willfully to make false or untrue statements, accusations or allegations in a complaint filed hereunder or to give false testimony concerning violations of this ordinance.

Section 9B-21. PENALTY.

Any person who violates any provisions of this ordinance shall be subject, upon conviction, to a fine up to but not exceeding the sum of Five Hundred and no/100 Dollars (\$500.00), or imprisonment for a term not exceeding six (6) months, or by both such fine and imprisonment.

III. If any section, subsection, sentence, clause or phrase of this ordinance is for any reason held illegal, invalid or unconstitutional by the decision of any court or regulatory body of competent jurisdiction, such decision shall not affect the validity of the remaining portions hereof. The City of Punta Gorda, Florida, hereby declares that it would have passed this ordinance and each section, subsection, sentence, clause and phrase hereof, irrespective of the fact that any one or more sections, subsections, sentences, clauses or phrases be declared illegal, invalid or unconstitutional, and all ordinances and parts of ordinances in conflict with the provisions of this ordinance are hereby repealed.

IV. Any ordinances or parts of ordinances in conflict herewith are repealed to the extent of such conflict.

V. This ordinance shall take effect immediately upon its adoption.

ADOPTED in regular session of the City Council of the City of Punta Gorda, Florida this 14th day of August, 2013.



WILLIAM ALBERS, Mayor

ATTEST:



KAREN SMITH, City Clerk

APPROVED AS TO FORM:



DAVID M. LEVIN, City Attorney

APPENDIX B
ANTI-DISPLACEMENT POLICY



City of Punta Gorda, Florida RESIDENTIAL ANTI-DISPLACEMENT AND RELOCATION ASSISTANCE PLAN

The City of Punta Gorda will replace all occupied and vacant occupiable low/moderate income dwelling units demolished or converted to a use other than as low/moderate income housing as a direct result of activities assisted with CDBG funds, as required by Section 104(d) of the Housing and Community Development Act of 1974, as amended (the Act), and implementing regulations at 24 CFR 570.496a.

All replacement housing will be provided within three (3) years of the commencement of the demolition or rehabilitation relating to conversion. Before obligating or expending funds that will directly result in such demolition or conversion, the City of Punta Gorda will make public and submit to the Department of Housing and Urban Development (HUD) the following information in writing:

1. Description of the proposed assisted activity;
2. The general location on a map and approximate number of dwelling units by size (number of bedrooms) that will be demolished or converted to a use other than as low/moderate dwelling units as a direct result of the assisted activity;
3. A time schedule for the commencement and completion of the demolition or conversion;
4. The general location on a map and approximate number of dwelling units by size (number of bedrooms) that will be provided as replacement dwelling units;
5. The source of funding and a time schedule for the provision of replacement dwelling units; and,
6. The basis for concluding that each replacement dwelling unit will remain a low/moderate income dwelling unit for at least ten (10) years from the date of the initial occupancy.

The City of Punta Gorda will provide relocation assistance, as described in 570.496a(b)(2), to each low/moderate income household displaced by the demolition of housing or by the conversion of a low/moderate income dwelling to another use as direct result of assisted activities.

Consistent with the goals and objectives of activities assisted under the Act, the City of Punta Gorda will take steps indicated below to minimize the displacement of persons from their homes.*

***The following are examples of steps to minimize displacement. The first two are required. The others are optional. Only check those which are appropriate for the project and local circumstances. Add other steps as necessary or appropriate.**

___ Consider all practical alternatives to any proposed project that may result in residential displacement. Alternatives to be considered include other sites for the proposed facilities/project. Also to be considered are the costs and benefits, both financial and non-financial, of each alternative.

___ Provide counseling and referral services to assist the displaced and find alternative housing in the community.

- ___ Work with area landlords and real estate brokers to locate vacancies for households facing displacement.
- ___ Stage rehabilitation of assisted housing to allow tenants to remain during and after rehabilitation, working with empty buildings or groups of empty units first so they can be rehabilitated first and tenants moved before rehab on occupied units or buildings is begun.
- ___ Establish temporary relocation facilities in order to house families whose displacement will be of short duration, so they can move back to their neighborhoods after rehabilitation or new construction.
- ___ Evaluate housing codes and rehabilitation standards in reinvestment areas to prevent their placing undue financial burden on long-established owners or on tenants of multi-family buildings.
- ___ Develop displacement watch systems in cooperation with neighborhood organizations to continuously review neighborhood development trends, identify displacement problems, and identify individuals facing displacement who need assistance.

APPENDIX C
AFFORDABLE HOUSING INCENTIVES

Chapter 11A PUNTA GORDA AFFORDABLE HOUSING IMPACT FEE INCENTIVES

Sec. 11A-1. Short Title.

This Chapter shall be known and cited as the "Punta Gorda Affordable Housing Impact Fee Incentives."

Sec. 11A-2. Findings.

The City Council of Punta Gorda, Florida (hereinafter "Council") hereby finds and declares that:

- (a) Punta Gorda, Florida, (hereinafter "City") has adopted updated impact fees established in Chapter 11, Punta Gorda Development Impact Fee Ordinance, to require new development to pay a proportionate share of the average public facility costs related to the provision of capital facilities needed to accommodate the demand for such facilities generated by new development.
- (b) The Comprehensive Plan for Punta Gorda, as adopted and amended by the Council and census and population studies predict that growth will continue and will create significant demands for public facilities needed to accommodate new development.
- (c) The Comprehensive Plan for Punta Gorda, as adopted and amended by the Council, identifies the need for additional units of affordable housing within the City, including both owner-occupied and rental units.
- (d) In balancing the need for new development to contribute to funding public facilities needed to accommodate new development and the need for additional affordable housing in the City, the City Council has determined that it is in the public interest to encourage the provision of affordable housing by providing the affordable housing incentives established herein.
- (e) The City is providing for the deferral of the payment of City imposed impact fees for qualifying owner-occupied affordable housing. This program provides only for the deferred payment of the impact fees due, not for the reduction or waiver of City imposed impact fees.
- (f) The City is providing for payment of impact fees due on Rental Affordable Housing Units on an installment basis over a specified number of years. This program provides only for installment payment of the impact fees due, not for the reduction or waiver of City-imposed impact fees.
- (g) The City is providing for the creation of an Impact Fee Transfer when the existing demand for capital facility capacity generated by development on one site is permanently reduced. Such Impact Fee Transfer units may be applied against the City imposed impact fees due on new affordable housing units developed on other property in the City.

(Ord. 1558-08, <sec> 2, 9-3-08; Ord. No. 1678-11, <sec> 4, 4-20-11)

Sec. 11A-3. Intent.

This Chapter is intended to encourage the provision of new units of owner-occupied affordable housing within the City of Punta Gorda by providing for deferral of payment of City imposed fees on qualifying units of Affordable Housing and for Impact Fee Transfers that may be used in payment of City imposed impact fees for new units of Affordable Housing where the demand for capital facilities generated by previously existing development has been permanently reduced on another site. These programs are intended to further the affordable housing goals and objectives in the Housing Element of the City's Comprehensive Plan.

Sec. 11A-4. Authority.

In the creation of the Impact Fee Deferral Program, the Impact Fee Transfer Program and the Rental Impact Fee Installment Payment Program, the Council is exercising its Charter home rule powers and its local authority, including police powers, pursuant to Article VII, Sections 1(f), 1(g) and 2(b) of the Florida Constitution; the Municipal Home Rule Powers Act, ch. 166, F.S., as amended; and Section 163.3161 et seq., F.S., as amended. The provisions of this Chapter shall not be construed to limit the scope of the City's power necessary to accomplish these purposes.

(Ord. No. 1558-08, <sec> 3, 9-3-08)

Sec. 11A-5. Definitions.

As applied in this Chapter, the following words and terms shall have the following meaning, unless another meaning is clearly intended:

Affordable Housing shall mean newly constructed, owner-occupied dwelling units that are intended to be and are owned and occupied by families meeting federal guidelines for moderate income families, low income families or very low income families. The provisions of Sections 11A-7 and 11A-8 of this Chapter 11A shall apply only to Affordable Housing dwelling units fulfilling these criteria and on which City imposed Impact Fees are due.

City Imposed Impact Fees shall mean the impact fees imposed by the City of Punta Gorda pursuant to Chapter 11 of the City Code. Water and Sewer impact fees, connection fees or capacity fees imposed by the City are excluded from the Affordable Housing Incentives Programs.

Impact Fee Transfer Receiving Site or Receiving Site shall mean the property on which Affordable Housing is being provided and on which an Impact Fee Transfer created by the permanent reduction of demand for capital facilities on a Sending Site is applied pursuant to this Chapter.

Impact Fee Transfer Sending Site or Sending Site shall mean the property on which demand for capital facilities is permanently reduced as a result of demolition, redevelopment or other activity which permanently reduces or eliminated the demand for capital facilities which was previously generated by development on the site. The Impact Fee Transfers created by this reduction in capital facility demand may be

permanently transferred and applied against the City imposed impact fees due on new Affordable Housing provided on an Impact Fee Receiving Site. Impact Fee Transfers may not be created from demolition or redevelopment of non-conforming uses on an Impact Fee Sending Site.

Impact Fee Transfer(s) shall mean the Impact Fee Transfer credit created by a permanent reduction in demand for capital facilities, by type of development and associated facility demand, on an Impact Fee Sending Site. Impact Fee Transfers by facility type may be applied against the City imposed impact fees by facility type due on new Affordable Housing units provided on an Impact Fee Transfer Receiving Site. Impact Fee Transfers shall be calculated based on the reduction in facility capacity demand by facility type as determined by the currently applicable City impact fee schedule.

Low Income Families shall mean families whose incomes are more than 50 percent but do not exceed 80 percent of the median income for the area as determined by the Secretary of the U.S. Department of Housing and Urban Development.

Moderate Income Families means families whose incomes are more than 80 percent but do not exceed 120 percent of the median income for the area as determined by the Secretary of the U.S. Department of Housing and Urban Development.

Rental Affordable Housing shall mean newly constructed single-family or multi-family family residential dwelling units on which City-imposed Impact Fees are due that are leased to and occupied by a low income family or very low income family that fulfills and maintains the relevant criteria established in this Chapter 11A at the commencement of the leasehold and during the duration of the leasehold.

Very Low Income Families shall mean families whose incomes do not exceed 50 percent of the median income for the area as determined by the Secretary of the U.S. Department of Housing and Urban Development.

(Ord. No. 1558-08, <sec> 4, 9-3-08)

Sec. 11A-6. Applicability.

The provisions of this Chapter 11A shall be applicable to the development of Affordable Housing on which City imposed impact fees are collected after the effective date of this Chapter. Where a building permit was issued after February 1, 2007 and prior to the effective date of this Chapter, an executed Deferral Agreement or Impact Fee Transfer Agreement(s), whichever are applicable, shall be accepted by the City as the basis for determination of the amount of City imposed impact fees due.

Sec. 11A-7. Affordable Housing Impact Fee Deferral Program.

- (a) Pursuant to the requirements established in this Section and Chapter 11A, the City shall defer the payment of impact fees due for any new owner-occupied dwelling unit which qualifies as Affordable Housing under this Chapter and which fulfills all other requirements of this Section.

- (b) Any person seeking an Affordable Housing Impact Fee Deferral for proposed residential development shall file with the City Manager an application for deferral prior to receiving a building permit for the proposed development, except as provided in Section 11A-6. The City shall provide application forms to be used by applicants. The application shall, at a minimum, include the following:
 - (1) Name and address of the applicant;
 - (2) An up-to-date, complete legal description of the site on which the proposed development is to be located, including the parcel identification number and the street address, if available; and
 - (3) The maximum income level of the applicant owner, or if the applicant owner is the developer or builder, the income level of the household to which the dwelling unit is to be sold.
- (c) If the proposed development meets the requirements for the Affordable Housing Impact Fee Deferral as set forth in this Section, the City Manager shall enter into an Impact Fee Deferral Agreement and is hereby authorized by the Council to execute such Deferral Agreement along with any associated tri-party agreement further defining the repayment obligations of the owner, applicant, builder and/or developer, as applicable. The recorded Impact Fee Deferral Agreement shall be accepted by the City in lieu of payment of the impact fees due pursuant to Chapter 11 of the City Code.
- (d) To qualify for Affordable Housing Impact Fee Deferral, the owner-occupied dwelling unit and owner(s) must fulfill all of the following criteria:
 - (1) The dwelling unit must be the homestead of the owner(s) under Section 4, Article X of the State Constitution. The qualifying owner(s) must be the first occupants and the first owner(s), other than the developer, of the newly constructed dwelling unit.
 - (2) The owner(s) or anticipated owner(s) of the dwelling unit must qualify as a very low income family, a low income family or a moderate income family as defined in Section 11A-5 at the time of execution of a Deferral Agreement by the owner(s).
 - (3) The monthly mortgage payment, including taxes and insurance, must not exceed 30 percent of that amount which represents the percentage of median annual gross income for the applicable household category defined in Section 11A-5. If the first institutional mortgage lender is satisfied that the owner(s)/household can afford the mortgage payments in excess of the 30 percent benchmark, the dwelling unit shall be deemed affordable even if the monthly mortgage payment, including taxes and insurance exceeds the 30 percent benchmark.
 - (4) If the application is submitted by a developer prior to construction of the dwelling unit and prior to purchase by a qualified purchaser, the

following additional requirements must be fulfilled:

- a. A written affirmation from the developer/builder to the City must guarantee to the City that the identified Affordable Housing unit(s) will be constructed and will be sold in compliance with the requirements of this Chapter. The affirmation must be in effect no later than the time of application for deferral and continue in effect for at least one year after issuance of a certificate of occupancy, and
- b. The qualifying purchasers must take ownership of the dwelling unit no later than one year after issuance of a certificate of occupancy and must be the initial occupants and owners, other than the developer, of the dwelling unit. If qualifying purchasers fail to take ownership of the dwelling unit no later than one year after issuance of a certificate of occupancy, the full amount of impact fees that were deferred on the unit shall immediately become due and payable with interest.

(5) Without Council approval, no more than 10 outstanding Deferral Agreements are permitted with an individual developer or for any developments that are under common ownership. For purposes of this Subsection, common ownership shall include ownership by the same person, corporation, firm, entity, partnership or unincorporated association, or ownership by different corporations, firms, partnerships, entities or unincorporated associations in which a stockbroker, partner or associate or a member of his family owns an interest in such corporation, firm, partnership, entity or unincorporated association.

(e) Impact Fee Deferral Agreements.

- (1) The owner of a dwelling unit on which impact fees are deferred under this Chapter shall execute an Impact Fee Deferral Agreement with the City. A separate Impact Fee Deferral Agreement shall be executed for each dwelling unit. Applicants are required to enter into a Deferral Agreement to qualify for impact fee deferral. The Deferral Agreement shall be recorded in the real property records of the County at no cost to the City and shall run with the land. The Deferral Agreement shall include such provisions as are necessary to effectuate the purposes of this Chapter and Section and shall provide for, at a minimum, the following:
 - a. Legal description of the property and the dwelling unit, including the parcel tax identification number and street address.
 - b. The amount of the City imposed impact fees deferred and the obligation that the total amount of deferred impact fees shall be paid in full upon the sale of the unit, upon any breach of the Deferral Agreement by the owner or upon the failure of the owner to continue to qualify under the

provisions of this Section.

- c. The rights and obligations under a Deferral Agreement, including the deferred impact fees, may not be assigned, transferred, credited, devised or otherwise conveyed separate and apart from the subject Affordable Housing dwelling unit and property.
- d. Deferred impact fees shall be a lien on the property which lien shall be recorded. The lien may be foreclosed upon in the event of noncompliance with the requirements of this Section and Chapter or in the event of a breach of the Deferral Agreement by owner. The lien shall terminate upon the recording of a release or satisfaction of lien in the public records of the County. Such release or satisfaction shall be recorded by the City upon payment in full of the deferred impact fees.
- e. In the event of a default of the Agreement by the owner and the default is not cured within 30 days after written notice is provided to the owner, the City may, at its sole option, collect the deferred impact fees in default as provided in this Section or bring a civil action to enforce the agreement or declare that the deferred impact fees are in default and are immediately due and payable. The City shall be entitled to recover all costs and fees, including attorney's fees and costs, incurred by the City in enforcing the Deferral Agreement, plus interest at the maximum statutory rate for judgments calculated on a calendar day basis until paid in full.

(f) Owner Reporting Obligations.

- (1) The impact fees deferred on a dwelling unit shall be a lien on the property until all requirements under this Chapter and the terms of all Deferral Agreements related to that dwelling have been satisfied in full.
- (2) The owner of a dwelling unit on which impact fees have been deferred shall annually submit an affidavit of continued compliance with the requirements of this Chapter and the terms of the applicable Deferral Agreement. The affidavit must be filed no later than 30 days after the anniversary of the date of issuance of the certificate of occupancy on the dwelling unit. A late fee of \$50.00 shall be paid to the City by the owner if the affidavit is not timely filed. If the owner fails to file the affidavit within four months after the anniversary date of issuance of the certificate of occupancy on the dwelling unit, the impact fees deferred shall become immediately due and payable in full and the City may immediately proceed to collect the impact fees due.

(g) Repayment.

- (1) All impact fees deferred at the time of building permit issuance for an owner-occupied dwelling unit shall become due and payable and shall be immediately paid in full to the City upon the occurrence of any of the following events:
 - a. Sale of the dwelling unit; or
 - b. Refinancing of the purchase mortgage or loans secured by senior real property security instruments; or
 - c. Loss of the homestead exemption under Section 4, Article X of the State Constitution; or
 - d. The first occurrence of any sale or transfer of any part of or interest in the affected real property; or
 - e. The failure of the owner to maintain compliance with the requirements of this Chapter and the terms of the applicable Deferral Agreement. However, the noncompliance of the owner with the terms of this Chapter and/or the applicable Deferral Agreement due solely to an increase in the household income over the standards established in this Chapter shall not trigger repayment obligations under this Chapter; or
 - f. The failure of an anticipated purchaser to complete the purchase of a dwelling unit for which a developer affirmation has been accepted by the City.
- (2) Repayment of deferred impact fees shall include any accrued interest. Interest on owner-occupied deferrals shall be computed at the rate of five percent per annum, but in no event shall the total accrued interest exceed 25 percent of the total impact fees deferred on the dwelling unit. Interest on developer deferrals qualified under Section 11A-7(d)(4) shall be computed at the rate of five percent per annum if the developer fails to transfer the dwelling unit to a qualified purchaser within one year of the date of issuance of the certificate of occupancy on the dwelling unit.

(Ord. No. 1558-08, <sec> 5, 9-3-08)

Sec. 11A-8. Affordable Housing Impact Fee Transfer Program.

- (a) Pursuant to the requirements of this Section and Chapter 11A, the City shall allow approved Impact Fee Transfers to be used as payment against City imposed impact fees due on new, owner-occupied dwelling units which qualify as Affordable Housing under this Chapter and which fulfill all other requirements of this section.
- (b) Impact Fee Transfers may be created by permanent reduction of demand for capital facility capacity through the demolition or redevelopment of existing development, excluding non-conforming uses, on one site (hereinafter "Impact Fee Transfer Sending Site" or "Sending Site"). Such Impact Fee

Transfers may be used as payment for City imposed impact fees due on Affordable Housing dwelling units on another site in the City (hereinafter "Impact Fee Transfer Receiving Site" or "Receiving Site").

- (c) Reduction in demand for facility capacity on the Sending Site shall be determined by calculating the capital facility demand generated by previously existing development on the Sending Site, using the type and number of dwelling units or amount and type of development and associated facility demand based on the currently applicable City impact fee schedules, less the facility demand generated by the development proposed for or constructed on the Sending Site, based on the currently applicable City impact fee schedules. The reduction in demand for facility capacity on the Sending Site shall be calculated separately for each type of facility or impact fee imposed by the City. The Applicant for participation in the Impact Fee Transfer Program shall bear the burden of providing adequate documentation needed for the City to determine any reduction in the demand for facility capacity of a Sending Site and any other information needed by the City in relation to this Program.
- (d) Notice of Impact Fee Transfer approved for a Sending Site shall be recorded in the real property records of the County by recording the executed Impact Fee Transfer Agreement(s) applicable to the Site. Any Impact Fee Transfer so recorded shall not be available for use on the Sending Site and may be used only for payment of impact fees due on Affordable Housing on a Receiving Site approved under this program. Any subsequent increase in demand for facility capacity on the Sending Site will require payment of applicable City imposed impact fees.
- (e) The Impact Fee Transfers from multiple Sending Sites may be aggregated for use in the provision of Affordable Housing on one or more Receiving Sites.
- (f) Applications for participation in the Impact Fee Transfer Program shall contain the following information submitted to the City Manager or his designee:
 - (1) A letter expressing intent to enter into Impact Fee Transfer agreements on the Sending Site(s) and the Receiving Site(s) to be recorded in the property records of the County;
 - (2) Legal Descriptions, including the parcel tax identification number and street address and proof of ownership of the Sending Site(s) and the Receiving Site(s) by the Applicant or Co-applicant(s);
 - (3) Documentation of the type and gross square footage of nonresidential development or number of dwelling units by type that previously existed on the Sending Site;
 - (4) Documentation of the proposed or existing development on the Sending Site that results in a reduced demand for public facilities compared to the previously existing development;
 - (5) Documentation of the number of Affordable Housing dwelling units to be constructed on the Receiving Site(s), including all data needed to

verify that the proposed units qualify as Affordable Housing under this Chapter; and

- (6) Any additional information needed by the City to adequately confirm and calculate the reduction in demand for facilities, identify the Sending and Receiving Sites, verify ownership and any other issues related to the Impact Fee Transfer Program.
- (e) Upon verification that the proposed housing units qualify as Affordable Housing under this Chapter and determination by the City of the amount of Impact Fee Transfer available from the Sending Site(s), the City and Applicant(s) shall enter into an Impact Fee Transfer Agreement for each Sending Site and each Receiving Site. All Impact Fee Transfer Agreements shall be approved by the City Council and executed by the City, the Applicant and the owner(s) of the Sites, if different from the Applicant. Executed Impact Fee Transfer Agreements shall be recorded in the property records of the County and a copy of each such Agreement shall be kept on file in the City as part of the administration records for the City's impact fees.
- (f) Failure of the Applicant(s) to fulfill the conditions and requirements of this Section and all provisions of the applicable Impact Fee Transfer Agreements, whether for the Sending or Receiving Sites, shall cause all City imposed impact fees otherwise due to become immediately due and payable in full.

Sec. 11A-9. Rental Affordable Housing Impact Fee Installment Payment Program.

- (a) Pursuant to the requirements established in this Section and Chapter 11A, the City shall defer the payment of impact fees due for any new rental dwelling unit which qualifies as Rental Affordable Housing under this Chapter and which fulfills all other requirements of this Section. The Council shall by Resolution establish a Rental Affordable Housing Impact Fee Installment Payment schedule, including the portion of impact fees to be paid at the time of building permit issuance, at the time of issuance of certificate of occupancy and remaining payments, including accrued interest, over a period of five (5) years from the date of issuance of certificate of occupancy.
- (b) Any person seeking Rental Affordable Housing Impact Fee Installment Payment under this Section for proposed residential development shall file with the City Manager an application for Rental Affordable Housing Installment Payment prior to receiving a building permit for the proposed development, except as provided by Section 11A-6. The City shall provide application forms to be used by applicants. The application shall, at a minimum, include the following:
 - (1) Name and address of the applicant and owner/lessor;
 - (2) An up-to-date, complete legal description of the site on which the proposed development is to be located, including the parcel

identification number and the street address, if available; and

- (3) The rental limits to be imposed on the Rental Affordable Housing Unit(s) which shall not exceed the rental limits established by the Florida Housing Finance Corporation for rents adjusted to bedroom size in projects assisted by the Florida Housing Finance Corporation or any other local, state or federal agency, based on unit size.
- (c) If the proposed development meets the requirements for the Rental Affordable Housing Impact Fee Installment Payment as set forth in this Section, the City Manager shall enter into an Impact Fee Installment Payment Agreement for each qualifying building and is hereby authorized by the Council to execute such Installment Payment Agreements along with any associated tri-party agreement further defining the repayment obligations of the owner/lessor, applicant, builder and/or developer, as applicable. The recorded Impact Fee Installment Payment Agreement shall be accepted by the City in lieu of payment of the total impact fees due at the time of building permit issuance pursuant to Chapter 11 of the City Code.
 - (d) To qualify for Rental Affordable Housing Impact Fee Installment Payment, the Rental Affordable Housing unit(s) and lessee(s) must fulfill all of the following criteria:
 - (1) The household renting/leasing the rental unit, including both single-family and multi-family units, must have a low or very low income level, at the commencement of the leasehold and during the duration thereof, as those terms are defined in this Chapter.
 - (2) The rental unit must be and must remain the household's permanent residence. The head of the household must be at least 18 years of age and must be either a citizen of the United States or a legal alien who permanently resides in the United States.
 - (3) In no instance shall rental limits exceed the rental limits established by the Florida Housing Finance Corporation for rents adjusted to bedroom size in projects assisted by the Florida Housing Finance Corporation, or any other local, state or federal agency, based on unit size.
 - (4) Without Council approval, no more than 20 outstanding Installment Payment Agreements are permitted with an individual owner/lessor or for any Rental Affordable Housing that is under common ownership. For purposes of this subsection, common ownership shall include ownership by the same person, corporation, firm, entity, partnership or unincorporated association, or ownership by different corporations, firms, partnerships, entities or unincorporated associations in which a stockbroker, partner or associate or a member of his family owns an interest in such corporation, firm, partnership, entity or unincorporated association.

(e) Impact Fee Installment Payment Agreements.

- (1) The owner/lessor of Rental Affordable Housing Unit(s) on which impact fees qualify for installment payments under this Chapter shall execute an Impact Fee Installment Payment Agreement with the City. A separate Impact Fee Installment Payment Agreement shall be executed for each building. Applicants are required to enter into an Installment Payment Agreement to qualify for installment payments of the impact fees due. The installment Payment Agreement shall be recorded in the real property records of the County at no cost to the City and shall run with the land. The Installment Payment Agreement shall include such provisions as are necessary to effectuate the purposes of this Chapter and Section and shall provide for, at a minimum, the following:
- a. Legal description of the property and the dwelling unit, including the parcel tax identification number and street address.
 - b. The amount of the City-imposed impact fees due on the building, the installment payment schedule and the obligation that the total amount of unpaid impact fees shall be paid in full upon any breach of the Installment Payment Agreement by the owner/lessor or upon the failure of the owner/lessor to continue to qualify under the provisions of this Section.
 - c. The rights and obligations under an Installment Payment Agreement may not be assigned, transferred, credited, devised or otherwise conveyed separate and apart from the subject Rental Affordable Housing units and property.
 - d. Unpaid impact fees under an Installment Payment Agreement shall be a lien on the property which lien shall be recorded. The lien may be foreclosed upon in the event of noncompliance with the requirements of this Section and Chapter or in the event of a breach of the Installment Payment Agreement by owner. The lien shall terminate upon the recording of a release or satisfaction of lien in the public records of the County. Such release or satisfaction shall be recorded by the City upon payment in full of the deferred impact fees.
 - e. In the event of a default of the Agreement by the owner and the default is not cured within 30 days after written notice is provided to the owner, the City may, at its sole option, collect the deferred impact fees in default as provided in this Section or bring a civil action to enforce the agreement or declare that the deferred impact fees are in default and are immediately due and payable. The City shall be entitled to recover all costs and fees, including attorney's fees and costs, incurred by the City in enforcing the Installment Payment Agreement, plus interest at the maximum statutory rate for judgments

calculated on a calendar day basis until paid in full.

(f) Owner Obligations.

- (1) The impact fees due on Rental Affordable Housing units under an Installment Payment Plan shall be a lien on the property until all requirements under this Chapter and the terms of the Installment Payment Agreement(s) related to that qualifying building have been satisfied in full.
- (2) The owner/lessor of Rental Affordable Housing unit(s) on which impact fees have qualified for installment payment shall annually submit an affidavit of continued compliance with the requirements of this Chapter and the terms of the applicable Installment Payment Agreement. The affidavit must be filed no later than 30 days after the anniversary of the date of issuance of the certificate of occupancy on the building containing the Rental Affordable Housing unit(s). A late fee of \$50.00 shall be paid to the City by the owner if the affidavit is not timely filed. If the owner fails to file the affidavit within four months after the anniversary date of issuance of the certificate of occupancy on the building containing the Rental Affordable Housing unit(s), all unpaid impact fees shall become immediately due and payable in full and the City may immediately proceed to collect the remaining impact fees due.

(g) Repayment.

- (1) All unpaid impact fees at the time of building permit issuance for a Rental Affordable Housing Unit shall become due and payable and shall be immediately paid in full to the City upon the occurrence of any of the failure of the owner to maintain compliance with the requirements of this Chapter and the terms of the applicable Installment Payment Agreement.
- (2) Payment of impact fees on an installment payment schedule shall include any accrued interest. Interest on installment payments shall be computed at the rate of five percent per annum, but in no event shall the total accrued interest exceed 25 percent of the total impact fees due on the Rental Housing Units(s).

(Ord. No. 1558-08, <sec> 6, 9-3-08; Ord. No. 1678-11, <sec> 5, 4-20-11)

Sec. 11A-10. Collection of Impact Fees in the Event of Default under this Chapter.

Whenever the City determines that there is a default under an Impact Fee Deferral Agreement, an Impact Fee Installment Payment Agreement, or an Impact Fee Transfer Agreement or the occurrence of any other condition causing impact fees to be due and payable under this Chapter, the impact fees due shall be deemed to be delinquent. The City shall proceed to collect the delinquent impact fees due as follows:

- (a) The City shall serve, by certified mail, return receipt requested or by any other then lawful means of delivery, a “notice of impact fees due statement” upon the applicant at the property address set forth in the relevant Agreement and to the owner at such address appearing on the most recent records maintained by the property appraiser of the County. Service shall be deemed effective on the date the return receipt indicates the notice was received by either the applicant or the owner or by any other evidence of the date that the “notice” was received by the addressee. The “notice of impact fees due statement” shall contain a description of the property, the conditions giving rise to the impact fees being due and shall advise the applicant and the owner as follows:
- (1) The amounts due including the impact fees and any accrued interest pursuant to an Impact Fee Deferral Agreement or an Impact Fee Installment Payment Agreement;
 - (2) The date that the impact fees became due and that as of date the unpaid impact fees became subject to a delinquency fee and that penalty interest began to accrue on that date and that such penalty interest will continue to accrue thereafter until all amounts due are paid in full;
 - (3) That in the event the impact fee and the delinquency fee are paid in full within 30 days after receipt of the “notice”, the delinquency fee and all penalty interest that would have otherwise accrued will be waived; however, interest accrued under an Impact Fee Deferral Agreement or under an Impact Fee Installment Payment Agreement will not be waived;
 - (4) That in the event the impact fees are not paid in full within 30 days after receipt of the “notice”, a lien against the property for which the building permit was secured may be recorded in the official records book of the County for all amounts then due after approval by City Council.
- (b) Upon becoming delinquent, a delinquency fee equal to ten percent of the total impact fees due, including interest accrued pursuant to an Impact Fee Deferral Agreement or an Impact Fee Installment Payment Agreement shall be assessed. Once delinquent, the total impact fees due, plus the delinquency fee, shall bear interest at the then applicable statutory rate for final judgments calculated on a calendar day basis, until paid in full.
- (c) Should the impact fee not be paid promptly, the City shall serve, by certified mail return receipt requested or by any other then lawful means of delivery a “Notice of lien” upon the delinquent applicant, if the building is under construction at the address indicated in the application for the building permit and upon the delinquent owner at the address appearing on the most recent records maintained by the property appraiser of the County. The notice of lien shall notify the delinquent applicant and delinquent owner that due to their failure to pay the impact fee, the City may file a claim of lien with the Clerk of the Circuit Court.
- (d) In the event the recipient of a notice of delinquency or claim of lien disputes any material aspect of either notice, the applicant, upon paying the impact fee

amounts set forth in the respective notice, may file a written appeal petition with the Council not later than 30 days after receipt of such notice. In reviewing the decision, the Council shall use the standards established herein. The appeal petition must advise the Council of all disputed issues regarding the amount due and shall explain the precise basis the applicant asserts that the notice is incorrect.

- (e) If the total impact fees due have not been received by the City within 30 days of receipt of the notice by the owner, the City Attorney may then, regardless of the filing of any appeal petition, request the Council to approve, at a regularly scheduled public meeting, the filing of a claim of lien with the Clerk of the Circuit Court and recording same in the official records of the County. The recorded claim of lien shall contain the legal description of the property, the amount of the delinquent impact fee, plus the delinquency fee and interest and the date the impact fee became due. Once recorded, the claim of lien shall constitute a lien against the property described therein. The City Attorney may proceed expeditiously to collect, foreclose or otherwise enforce said lien.
- (f) After the expiration of the 30 days from the date of recording of the claim of lien, as provided herein, a suit may be filed to foreclose said lien. Such foreclosure proceedings shall be instituted, conducted and enforced in conformity with the procedures for the foreclosure of municipal special assessment liens, as set forth in F.S. ch. 173, as amended, which provisions are hereby incorporated herein in their entirety to the same extent as if such provisions were set forth herein verbatim.
- (g) The liens for delinquent impact fees imposed hereunder shall remain liens, coequal with the lien of all State, County, district and municipal taxes, superior in dignity to all other filed liens and claims, until paid as provided herein.
- (h) The foregoing paragraphs of this Section notwithstanding, all impact fees not paid to the City in full when due shall automatically become "delinquent". Moreover, when any impact fees become delinquent anywhere throughout the unified whole of a respective development, the City is authorized to withhold every then unissued building permit(s) or other City approvals applied for by, or on behalf of, the landowner or the developer and in addition apply any and all of the civil penalties and remedies set forth in the enforcement division of the City land development code until all such delinquent impact fees have been paid to the City in full.
- (i) The collection and enforcement procedures set forth in this Section shall be cumulative with, supplemental to and in addition to, all other applicable procedures provided in any other ordinances or administrative regulations of the City or any applicable law or administrative regulation of the State of Florida. Failure of the City to follow the procedure set forth in this Section shall not constitute a waiver of its rights to proceed under any other ordinances or administrative regulations of the City or any applicable law or administrative regulation of the State of Florida.

(Ord. No. 1558-08, <sec> 7, 9-3-08)

Sec. 11A-11. Reporting on and suspension of Affordable Housing Impact Fee Incentives.

Information on the number of Affordable Housing Impact Fee Deferrals Agreements, the number of Impact Fee Installment Payment Agreements and the number and amount of Impact Fee Transfers approved each year shall be included in the Annual Report on the City's impact fees required in Chapter 11. Any additional information on the programs that will assist the Council in evaluating the effectiveness of the affordable housing incentives established in this Chapter and the effect, if any, on the provision of capital facilities should be included in the Annual Report. Should the Council determine that the Affordable Housing Incentives Program is significantly reducing the City's impact fee revenue and impairing the provision of capital facilities under the City's capital improvements program, the Council may, by resolution, suspend one or both of the Affordable Housing Incentive Programs. The suspension shall become effective ninety days after adoption of such resolution. Applications submitted prior to or on the date of suspension of the program(s) will be processed by the City. Applications submitted after the suspension date will not be accepted by the City.

(Ord. No. 1558-08, <sec> 8, 9-3-08)

APPENDIX D
DISCRIMINATION COMPLAINT POLICY

Federal & State Compliance Policies

Title VI

Notice To The Public

The City of Punta Gorda, Florida, hereby gives public notice that is the policy of the City of Punta Gorda to assure full compliance with Title VI of the Civil Rights Act of 1964, and other applicable statues and regulations in the operation of all programs and services without regard to race, color, national origin, sex, age, disability, religion, income or family status. Any person who believes they have been aggrieved by any unlawful discriminatory practice under Title VI has the right to file a formal complaint with the City of Punta Gorda, Florida. Any such complaint must be filed in writing or in person with the City's Title VI Coordinator. For more information on the City of Punta Gorda, Florida civil rights program, and the procedures to file a civil rights complaint:

Phone 941-575-3308
TTY 941-575-5013)
E-mail: humres@pgorda.us;
Physical & Mailing Address -
326 W. Marion Avenue, Punta Gorda, Florida, 33950.

The City of Punta Gorda works to ensure that all persons regardless of their proficiency in English have access to the benefits of all of the City's programs and services. If you need documents translated or an interpreter to have access to a program or service you should contact the City's Title VI Coordinator at 941-575-3308.

<u>Title VI Policy and Plan</u>
<u>Title VI Assurance Statement</u>
<u>Title VI and You ... (English)</u>
<u>Title VI and You ... (Spanish)</u>
<u>Language Access Plan</u>
<u>Title VI Complaint Form</u> <u>(English)</u>
<u>Title VI Complaint Form</u> <u>(Spanish)</u>

Overview

The purpose of Title VI of the Civil Rights Act of 1964 is to prohibit programs that receive federal funds from discriminating against participants on the basis of race, color, national origin, sex, age, disability, religion, income or family status. Title VI of the Civil Rights Act of 1964, as codified in 42 U.S.C. 2000d, states:

No person in the United States shall, on the ground of race, color, or national origin, be excluded from participation in, be denied the benefits of, or be subjected to discrimination under any program or activity receiving Federal financial assistance.

The intent of the law is to ensure that all persons, regardless of race, color, national origin, sex, age, disability, religion, income or family status, are allowed to participate in federally funded programs and services. To ensure that the City meets its compliance responsibility, procedures have been established to provide for monitoring of Title VI compliance, activities and complaint processing

At the August 13, 2014, the City Council of Punta Gorda adopted a Title VI Non-Discrimination Policy. The purpose of this policy is to state the City of Punta Gorda's commitment to fully comply with all Non-Discrimination provisions pursuant to Title VI of the Civil rights Act of 1964 and other applicable statutes and regulations related.

APPENDIX E
HOUSING MARKET DATA



Port Charlotte - Punta Gorda - North Port Association of Realtors®
Monthly Sales Trend Indicator
2014

Sales by Price Range - Single Family Homes & Villa's

Price Range	Jan-14	Feb-14	Mar-14	Apr-14	May-14	Jun-14	Jul-14	Aug-14	Sep-14	Oct-14	Nov-14	Dec-14	YTD Total	Curr Month	YTD
\$1 - 49,999	18	30	28	27	32	27	23	21					206	6.29%	7.30%
\$50,000 - 59,999	24	14	18	19	14	13	7	13					122	3.89%	4.32%
\$60,000 - 69,999	13	17	17	29	13	24	13	18					144	5.39%	5.10%
\$70,000 - 79,999	14	19	21	22	23	19	29	13					160	3.89%	5.67%
\$80,000 - 89,999	10	18	20	29	23	25	22	11					158	3.29%	5.60%
\$90,000 - 99,999	18	8	12	15	17	12	9	9					100	2.69%	3.54%
\$100,000 - 119,999	21	23	34	40	31	31	26	26					232	7.78%	8.22%
\$120,000 - 139,999	21	36	44	48	49	47	41	50					336	14.97%	11.90%
\$140,000 - 159,999	29	36	34	41	32	37	34	43					286	12.87%	10.13%
\$160,000 - 179,999	17	16	33	33	32	35	31	29					226	8.68%	8.01%
\$180,000 - 199,999	19	17	18	24	25	19	15	22					159	6.59%	5.63%
\$200,000 - 249,999	14	33	31	34	32	42	36	33					255	9.88%	9.03%
\$250,000 - 299,999	16	15	15	26	22	19	20	18					151	5.39%	5.35%
\$300,000 - 349,999	8	12	4	16	11	11	11	10					83	2.99%	2.94%
\$350,000 - 399,999	10	7	14	13	11	11	8	5					79	1.50%	2.80%
\$400,000 - 499,999	8	2	6	12	12	11	14	8					73	2.40%	2.59%
\$500,000 - 599,999	3	3	1	1	5	4	5	2					24	0.60%	0.85%
\$600,000 - 699,999	2	1	0	1	2	0	3	2					11	0.60%	0.39%
\$700,000 - 799,999	0	1	2	0	0	1	1	1					6	0.30%	0.21%
\$800,000 - 899,999	2	1	1	1	2	0	0	0					7	0.00%	0.25%
\$900,000 - 999,999	1	0	0	0	0	0	0	0					1	0.00%	0.04%
\$1,000,000 - and over	0	0	0	2	2	0	0	0					4	0.00%	0.14%
Current Year	268	309	353	433	390	388	348	334					2,823		
Previous Year	264	281	340	345	372	339	330	305					2,576		
Change from last month		15.30%	14.24%	22.66%	-9.93%	-0.51%	-10.31%	-4.02%							
Change from last year	1.52%	9.96%	3.82%	25.51%	4.84%	14.45%	5.45%	9.51%							
Current YTD	268	577	930	1,363	1,753	2,141	2,489	2,823							
Previous YTD	264	545	885	1,230	1,602	1,941	2,271	2,576							
% Change YTD	1.52%	5.87%	5.08%	10.81%	9.43%	10.30%	9.60%	9.59%							



**Port Charlotte - Punta Gorda - North Port Association of Realtors®
 Monthly Sales Trend Indicator
 2014**

Sales by Price Range - Condominiums, Townhouses and Co-Op's

Price Range	Jan-14	Feb-14	Mar-14	Apr-14	May-14	Jun-14	Jul-14	Aug-14	Sep-14	Oct-14	Nov-14	Dec-14	YTD Total	Curr Month	YTD
\$1 - 49,999	10	9	14	9	10	11	9	8					80	14.81%	14.04%
\$50,000 - 59,999	2	9	8	5	4	6	1	4					39	7.41%	6.84%
\$60,000 - 69,999	8	6	9	9	8	6	6	7					59	12.96%	10.35%
\$70,000 - 79,999	4	3	8	5	6	4	5	3					38	5.56%	6.67%
\$80,000 - 89,999	8	3	5	6	6	2	3	3					36	5.56%	6.32%
\$90,000 - 99,999	4	3	4	8	6	3	6	2					36	3.70%	6.32%
\$100,000 - 119,999	7	5	5	12	5	6	6	5					51	9.26%	8.95%
\$120,000 - 139,999	6	3	9	10	11	5	5	5					54	9.26%	9.47%
\$140,000 - 159,999	4	4	6	5	1	3	3	1					27	1.85%	4.74%
\$160,000 - 179,999	2	3	7	3	5	1	3	0					24	0.00%	4.21%
\$180,000 - 199,999	2	1	3	4	3	2	4	3					22	5.56%	3.86%
\$200,000 - 249,999	5	1	6	10	5	3	3	4					37	7.41%	6.49%
\$250,000 - 299,999	5	2	4	5	3	6	2	1					28	1.85%	4.91%
\$300,000 - 349,999	0	0	2	4	3	1	3	2					15	3.70%	2.63%
\$350,000 - 399,999	1	2	4	1	1	1	1	4					15	7.41%	2.63%
\$400,000 - 499,999	0	0	1	3	0	2	0	2					8	3.70%	1.40%
\$500,000 - 599,999	0	1	0	0	0	0	0	0					1	0.00%	0.18%
\$600,000 - 699,999	0	0	0	0	0	0	0	0					0	0.00%	0.00%
\$700,000 - 799,999	0	0	0	0	0	0	0	0					0	0.00%	0.00%
\$800,000 - 899,999	0	0	0	0	0	0	0	0					0	0.00%	0.00%
\$900,000 - 999,999	0	0	0	0	0	0	0	0					0	0.00%	0.00%
\$1,000,000 - and over	0	0	0	0	0	0	0	0					0	0.00%	0.00%
Current Year	68	55	95	99	77	62	60	54					570		
Previous Year	40	58	71	95	69	65	65	58					521		
Change from last month		-19.12%	72.73%	4.21%	-22.22%	-19.48%	-3.23%	-10.00%							
Change from last year	70.00%	-5.17%	33.80%	4.21%	11.59%	-4.62%	-7.69%	-6.90%							
Current YTD	68	123	218	317	394	456	516	570							
Previous YTD	40	98	169	264	333	398	463	521							
% Change YTD	70.00%	25.51%	28.99%	20.08%	18.32%	14.57%	11.45%	9.40%							



Port Charlotte - Punta Gorda - North Port Association of Realtors®
Monthly Sales Trend Indicator
2014
Sales by Price Range - Overall

Price Range	Jan-14	Feb-14	Mar-14	Apr-14	May-14	Jun-14	Jul-14	Aug-14	Sep-14	Oct-14	Nov-14	Dec-14	YTD Total	Curr Month	YTD
\$1 - 49,999	33	54	58	45	48	47	40	34					359	8.33%	9.88%
\$50,000 - 59,999	30	27	31	32	20	19	10	20					189	4.90%	5.20%
\$60,000 - 69,999	24	25	31	43	23	31	20	27					224	6.62%	6.16%
\$70,000 - 79,999	18	28	36	37	32	23	39	18					231	4.41%	6.35%
\$80,000 - 89,999	20	22	28	46	35	28	28	15					222	3.68%	6.11%
\$90,000 - 99,999	25	12	18	27	24	16	15	11					148	2.70%	4.07%
\$100,000 - 119,999	30	30	41	54	37	37	35	34					298	8.33%	8.20%
\$120,000 - 139,999	30	40	55	60	62	53	46	56					402	13.73%	11.06%
\$140,000 - 159,999	34	41	43	50	33	40	37	46					324	11.27%	8.91%
\$160,000 - 179,999	19	19	41	37	37	36	34	29					252	7.11%	6.93%
\$180,000 - 199,999	22	18	21	28	28	21	20	25					183	6.13%	5.03%
\$200,000 - 249,999	19	35	37	44	37	45	39	37					293	9.07%	8.06%
\$250,000 - 299,999	21	17	19	31	25	25	22	19					179	4.66%	4.92%
\$300,000 - 349,999	8	12	6	20	14	12	14	12					98	2.94%	2.70%
\$350,000 - 399,999	11	9	18	14	12	12	9	9					94	2.21%	2.59%
\$400,000 - 499,999	8	2	7	15	13	14	14	10					83	2.45%	2.28%
\$500,000 - 599,999	3	4	1	1	5	4	5	3					26	0.74%	0.72%
\$600,000 - 699,999	2	1	0	1	2	1	3	2					12	0.49%	0.33%
\$700,000 - 799,999	0	1	2	0	0	1	1	1					6	0.25%	0.17%
\$800,000 - 899,999	2	1	1	1	2	0	0	0					7	0.00%	0.19%
\$900,000 - 999,999	1	0	0	0	0	0	0	0					1	0.00%	0.03%
\$1,000,000 - and over	0	0	0	2	2	0	0	0					4	0.00%	0.11%
Current Year	360	398	494	588	491	465	431	408					3,635		
Previous Year	317	364	449	482	465	417	409	375					3,278		
Change from last month		10.56%	24.12%	19.03%	-16.50%	-5.30%	-7.31%	-5.34%							
Change from last year		9.34%	10.02%	21.99%	5.59%	11.51%	5.38%	8.80%							
Current YTD	360	758	1,252	1,840	2,331	2,796	3,227	3,635							
Previous YTD	317	681	1,130	1,612	2,077	2,494	2,903	3,278							
% Change YTD	13.56%	11.31%	10.80%	14.14%	12.23%	12.11%	11.16%	10.89%							



**Port Charlotte - Punta Gorda - North Port Association of Realtors®
 Monthly Sales Trend Indicator
 2014**

Sales by Bedroom Count

Bedrooms	Jan-14	Feb-14	Mar-14	Apr-14	May-14	Jun-14	Jul-14	Aug-14	Sep-14	Oct-14	Nov-14	Dec-14	YTD Total	Curr Month	YTD
0	0	0	0	0	0	0	0	0	0	0	0	0	0	0.00%	0.00%
1	7	5	9	6	6	9	4	4	0	0	0	0	50	0.98%	1.38%
2	147	152	212	225	175	141	146	128	0	0	0	0	1,326	31.37%	36.48%
3	180	208	251	316	280	280	243	241	0	0	0	0	1,999	59.07%	54.99%
4	20	27	20	39	26	31	38	30	0	0	0	0	231	7.35%	6.35%
5	4	6	1	2	4	3	0	2	0	0	0	0	22	0.49%	0.61%
6+	2	0	1	0	0	1	0	3	0	0	0	0	7	0.74%	0.19%
Total	360	398	494	588	491	465	431	408	0	0	0	0	3,635	100.00%	100.00%

Sales by Bathroom Count

Bathrooms	Jan-14	Feb-14	Mar-14	Apr-14	May-14	Jun-14	Jul-14	Aug-14	Sep-14	Oct-14	Nov-14	Dec-14	YTD Total	Curr Month	YTD
1	32	35	49	39	41	53	33	30	0	0	0	0	312	7.35%	8.58%
2	296	335	419	510	424	384	370	349	0	0	0	0	3,087	85.54%	84.92%
3	26	26	22	37	22	24	26	24	0	0	0	0	207	5.88%	5.69%
4	3	2	4	2	3	3	1	4	0	0	0	0	22	0.98%	0.61%
5	1	0	0	0	1	1	1	0	0	0	0	0	4	0.00%	0.11%
6+	2	0	0	0	0	0	0	1	0	0	0	0	3	0.25%	0.08%
Total	360	398	494	588	491	465	431	408	0	0	0	0	3,635	100.00%	100.00%



Port Charlotte - Punta Gorda - North Port Association of Realtors®
Monthly Sales Trend Indicator
2014
Sales by Housing Style

Style	Jan-14	Feb-14	Mar-14	Apr-14	May-14	Jun-14	Jul-14	Aug-14	Sep-14	Oct-14	Nov-14	Dec-14	YTD Total	Curr Month	YTD
Single Family Home	255	291	332	414	374	372	331	321	0	0	0	0	2,690	78.68%	74.00%
Condominium	66	54	89	93	72	58	55	51	0	0	0	0	538	12.50%	14.80%
Manufactured/Mobile Home	23	31	45	55	22	12	21	18	0	0	0	0	227	4.41%	6.24%
Villa	13	18	21	19	16	16	17	13	0	0	0	0	133	3.19%	3.66%
Townhouse	2	1	6	6	5	4	5	3	0	0	0	0	32	0.74%	0.88%
Modular	0	2	1	1	1	0	2	1	0	0	0	0	8	0.25%	0.22%
Half Duplex	1	1	0	0	1	3	0	1	0	0	0	0	7	0.25%	0.19%
Total	360	398	494	588	491	465	431	408	0	0	0	0	3,635	100.00%	100.00%



Port Charlotte - Punta Gorda - North Port Association of Realtors®
Multiple Listing One Month Sales and Inventory Report - August 1 to August 31, 2014

Price Range	Sold Units	Market Share	Average List Price	Average Sale Price	% List to Sell	Avg DOM	Inventory on Market	Months Supply
\$1 - 49,999	34	8.33%	43,650	39,580	91.00%	111	80	2.4
\$50,000 - 59,999	20	4.90%	60,705	54,569	90.00%	115	47	2.4
\$60,000 - 69,999	27	6.62%	68,951	65,114	94.00%	96	70	2.6
\$70,000 - 79,999	18	4.41%	78,306	73,253	94.00%	109	61	3.4
\$80,000 - 89,999	15	3.68%	91,177	84,517	93.00%	69	62	4.1
\$90,000 - 99,999	11	2.70%	99,731	95,607	96.00%	118	45	4.1
\$100,000 - 119,999	34	8.33%	112,779	110,426	98.00%	91	103	3.0
\$120,000 - 139,999	56	13.73%	136,131	129,173	95.00%	72	140	2.5
\$140,000 - 159,999	46	11.27%	154,420	149,651	97.00%	79	123	2.7
\$160,000 - 179,999	29	7.11%	172,345	167,792	97.00%	75	122	4.2
\$180,000 - 199,999	25	6.13%	194,404	186,752	96.00%	95	106	4.2
\$200,000 - 249,999	37	9.07%	235,257	223,703	95.00%	84	186	5.0
\$250,000 - 299,999	19	4.66%	291,676	275,059	94.00%	98	161	8.5
\$300,000 - 349,999	12	2.94%	334,150	319,929	96.00%	74	100	8.3
\$350,000 - 399,999	9	2.21%	391,278	370,944	95.00%	221	88	9.8
\$400,000 - 499,999	10	2.45%	465,879	445,289	96.00%	107	89	8.9
\$500,000 - 599,999	3	0.74%	585,592	554,000	95.00%	234	48	16.0
\$600,000 - 699,999	2	0.49%	709,500	661,000	93.00%	301	31	15.5
\$700,000 - 799,999	1	0.25%	739,000	715,000	97.00%	29	23	23.0
\$800,000 - 899,999	0	0.00%	0	0	0.00%		12	
\$900,000 - 999,999	0	0.00%	0	0	0.00%		13	
\$1,000,000 - and over	0	0.00%	0	0	0.00%		31	
Totals	408	100.00%	164,717	157,041	95.00%	95	1,741	4.3

This data represents all residential sales. Reported sales are dependent upon timeliness of sales and totality of information Reported by participants.

The data reflects only The sales published through My Florida Regional MLS and does not include all sales in The Reported areas.

Neither The Association/Board nor The MFRMLS is in any way responsible for its accuracy.



Port Charlotte - Punta Gorda - North Port Association of Realtors®
Multiple Listing YTD Sales and Inventory Report - January 1 to August 31, 2014

Price Range	Sold Units	Market Share	Average List Price	Average Sale Price	% List to Sell	Avg DOM	Inventory on Market	Months Supply
\$1 - 49,999	359	9.88%	41,338	36,998	90.00%	99	80	1.8
\$50,000 - 59,999	189	5.20%	59,668	54,656	92.00%	104	47	2.0
\$60,000 - 69,999	224	6.16%	69,406	64,788	93.00%	86	70	2.5
\$70,000 - 79,999	231	6.35%	78,939	74,149	94.00%	91	61	2.1
\$80,000 - 89,999	222	6.11%	88,957	84,367	95.00%	88	62	2.2
\$90,000 - 99,999	148	4.07%	100,579	94,261	94.00%	105	45	2.4
\$100,000 - 119,999	298	8.20%	115,831	110,535	95.00%	90	103	2.8
\$120,000 - 139,999	402	11.06%	134,956	129,846	96.00%	81	140	2.8
\$140,000 - 159,999	324	8.91%	155,126	149,057	96.00%	84	123	3.0
\$160,000 - 179,999	252	6.93%	175,452	169,035	96.00%	90	122	3.9
\$180,000 - 199,999	183	5.03%	196,628	188,961	96.00%	106	106	4.6
\$200,000 - 249,999	293	8.06%	233,757	222,096	95.00%	110	186	5.1
\$250,000 - 299,999	179	4.92%	284,519	270,597	95.00%	105	161	7.2
\$300,000 - 349,999	98	2.70%	337,300	322,865	96.00%	115	100	8.2
\$350,000 - 399,999	94	2.59%	391,282	372,166	95.00%	144	88	7.5
\$400,000 - 499,999	83	2.28%	461,220	440,882	96.00%	104	89	8.6
\$500,000 - 599,999	26	0.72%	573,714	544,030	95.00%	135	48	14.8
\$600,000 - 699,999	12	0.33%	689,567	648,708	94.00%	146	31	20.7
\$700,000 - 799,999	6	0.17%	777,817	732,500	94.00%	296	23	30.7
\$800,000 - 899,999	7	0.19%	885,850	838,214	95.00%	197	12	13.7
\$900,000 - 999,999	1	0.03%	999,000	950,000	95.00%	281	13	104.0
\$1,000,000 - and over	4	0.11%	1,664,975	1,493,750	90.00%	89	31	62.0
Totals	3,635	100.00%	160,390	152,513	95.00%	97	1,741	3.8

This data represents all residential sales. Reported sales are dependent upon timeliness of sales and totality of information Reported by participants.
The data reflects only The sales published through My Florida Regional MLS and does not include all sales in The Reported areas.
Neither The Association/Board nor The MFRMLS is in any way responsible for its accuracy.

Port Charlotte - Punta Gorda - North Port Association of Realtors®



Four Year Sales and Inventory History 2010 - 2014 Compiled from Monthly Sales and Inventory Reports

Month	Monthly Sales	Average List Price	Average Sale Price	% Diff Sell/List	Avg DOM	Current Inventory	Months Inventory
01-SEP-10	293	118,613	110,402	93%	97	4,212	14.4
01-OCT-10	273	135,995	125,066	92%	103	4,227	15.5
01-NOV-10	270	128,524	119,172	93%	107	4,262	15.8
01-DEC-10	336	126,679	117,987	93%	113	4,242	12.6
01-JAN-11	310	115,200	107,167	93%	137	4,167	13.4
01-FEB-11	353	121,037	113,008	93%	122	4,042	11.5
01-MAR-11	488	116,683	108,346	93%	119	3,862	7.9
01-APR-11	431	128,350	119,355	93%	138	3,673	8.5
01-MAY-11	395	128,600	119,946	93%	127	3,459	8.8
01-JUN-11	352	141,813	131,543	93%	129	3,337	9.5
01-JUL-11	298	137,983	129,284	94%	133	3,183	10.7
01-AUG-11	327	125,745	118,372	94%	129	3,138	9.6
01-SEP-11	279	120,896	113,123	94%	146	3,114	11.2
01-OCT-11	290	114,945	107,275	93%	131	3,148	10.9
01-NOV-11	292	121,563	114,021	94%	123	3,229	11.1
01-DEC-11	323	126,472	118,814	94%	117	3,196	9.9
01-JAN-12	331	124,698	116,124	93%	138	3,134	9.5
01-FEB-12	357	127,279	118,311	93%	120	3,094	8.7
01-MAR-12	446	138,347	129,763	94%	119	3,022	6.8
01-APR-12	464	140,470	131,645	94%	123	2,943	6.3
01-MAY-12	410	147,779	138,835	94%	118	2,742	6.7
01-JUN-12	395	148,157	139,307	94%	112	2,643	6.7
01-JUL-12	362	143,982	136,571	95%	106	2,551	7.0
01-AUG-12	368	145,799	138,162	95%	107	2,492	6.8
01-SEP-12	302	135,109	127,750	95%	101	2,481	8.2
01-OCT-12	339	133,119	125,519	94%	101	2,571	7.6
01-NOV-12	320	139,625	133,259	95%	111	2,692	8.4
01-DEC-12	349	148,724	140,083	94%	92	2,733	7.8
01-JAN-13	317	137,545	128,692	94%	86	2,761	8.7
01-FEB-13	364	146,961	138,195	94%	95	2,841	7.8
01-MAR-13	449	149,414	141,236	95%	106	2,739	6.1
01-APR-13	482	153,293	145,264	95%	105	2,690	5.6
01-MAY-13	465	162,463	153,811	95%	114	2,512	5.4
01-JUN-13	417	154,781	147,444	95%	99	2,493	6.0
01-JUL-13	409	183,862	174,187	95%	98	2,504	6.1
01-AUG-13	375	150,236	143,918	96%	89	2,512	6.7
01-SEP-13	353	161,707	154,489	96%	90	2,553	7.2
01-OCT-13	394	144,047	137,483	95%	93	2,687	6.8
01-NOV-13	334	147,184	138,308	94%	80	2,776	8.3
01-DEC-13	415	173,896	165,471	95%	83	2,867	6.9
01-JAN-14	360	161,492	153,532	95%	105	2,830	7.9
01-FEB-14	398	148,275	140,782	95%	100	2,849	7.2
01-MAR-14	494	147,767	140,257	95%	94	2,662	5.4
01-APR-14	588	159,926	151,460	95%	94	2,484	4.2
01-MAY-14	491	169,574	161,121	95%	94	2,159	4.4
01-JUN-14	465	164,303	156,040	95%	96	1,998	4.3
01-JUL-14	431	166,975	160,085	96%	103	1,855	4.3
01-AUG-14	408	164,717	157,041	95%	95	1,741	4.3

Appendix #2 - Charlotte County School Facilities Map Series

SCH APPENDIX I – FUTURE SCHOOL FACILITIES MAP SERIES, “SFAM Series”

INDEX OF MAPS

[Map 1: Elementary School Boundary](#)

[Map 2: Middle School Boundary](#)

[Map 3: High School Boundary](#)

[Map 4: Ancillary Facilities Location](#)

[Map 5: Future Schools Locations](#)

[Map 6: Elementary School Concurrency Service Areas](#)

[Map 7: Middle School Concurrency Service Areas](#)

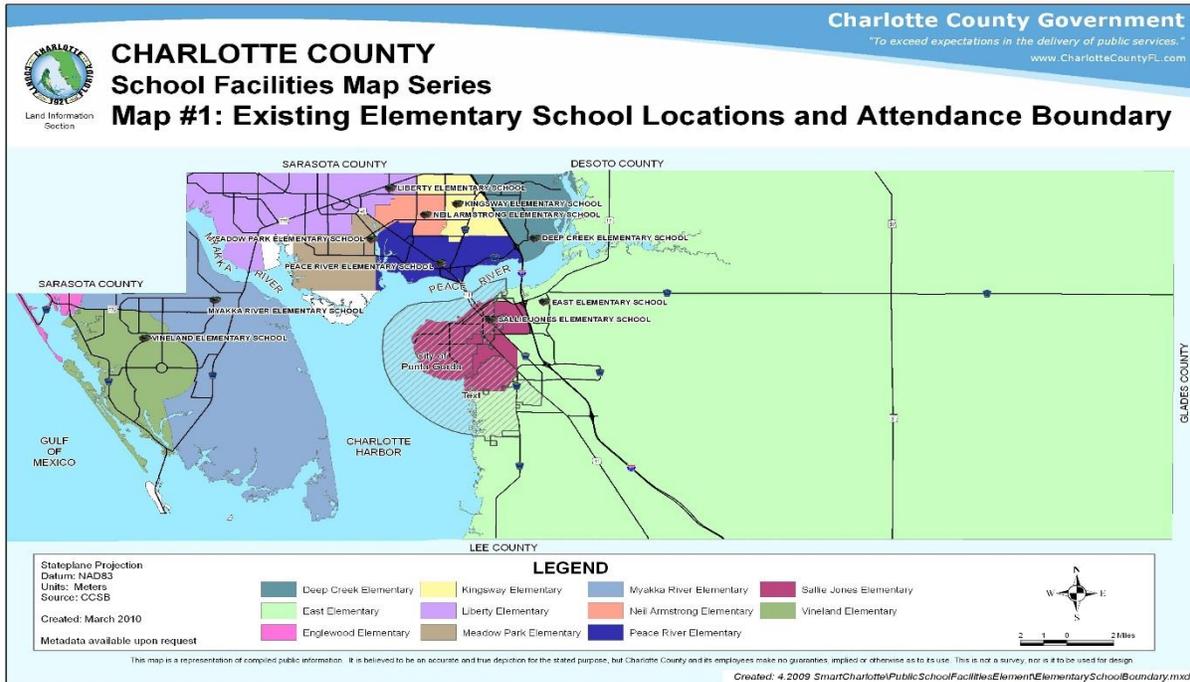
[Map 8: High School Concurrency Service Areas](#)

[Map 9: Co-Location Opportunities](#)

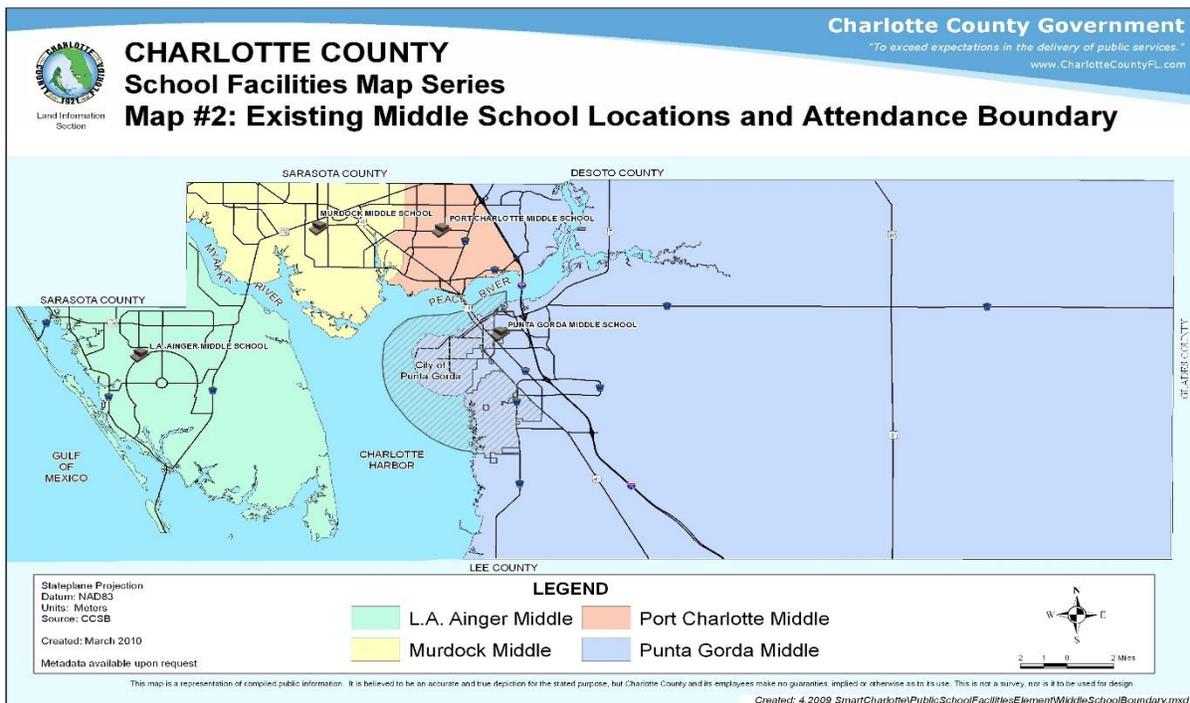
Printable versions of these maps can be found on the following webpage:

<http://www.charlottecountyfl.gov/services/planningzoning/Pages/CompPlan-Public-School-Facilities.aspx>

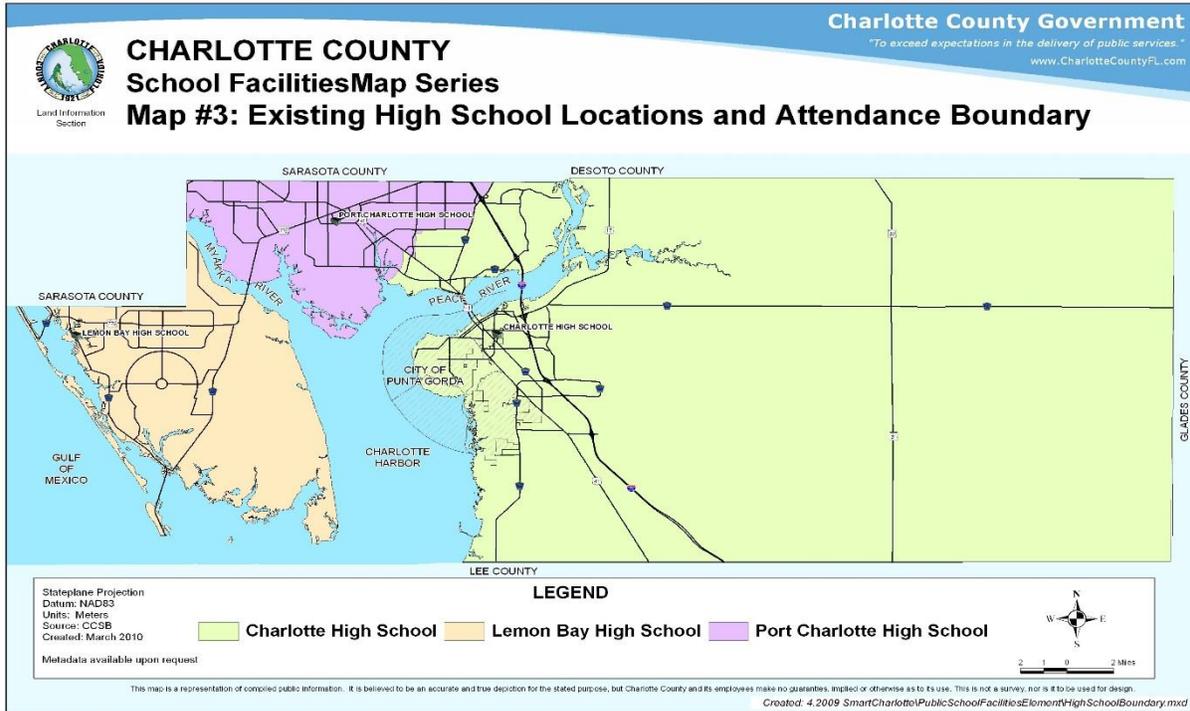
MAP 1: Elementary School Boundary



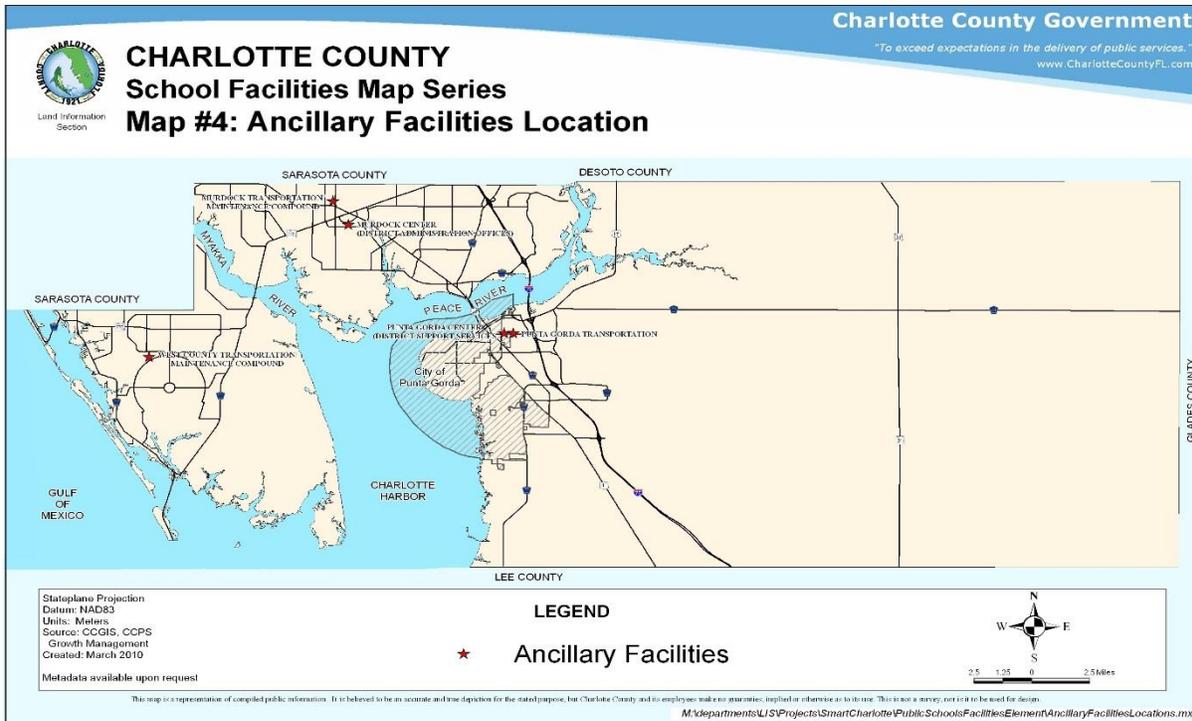
MAP 2: Middle School Boundary



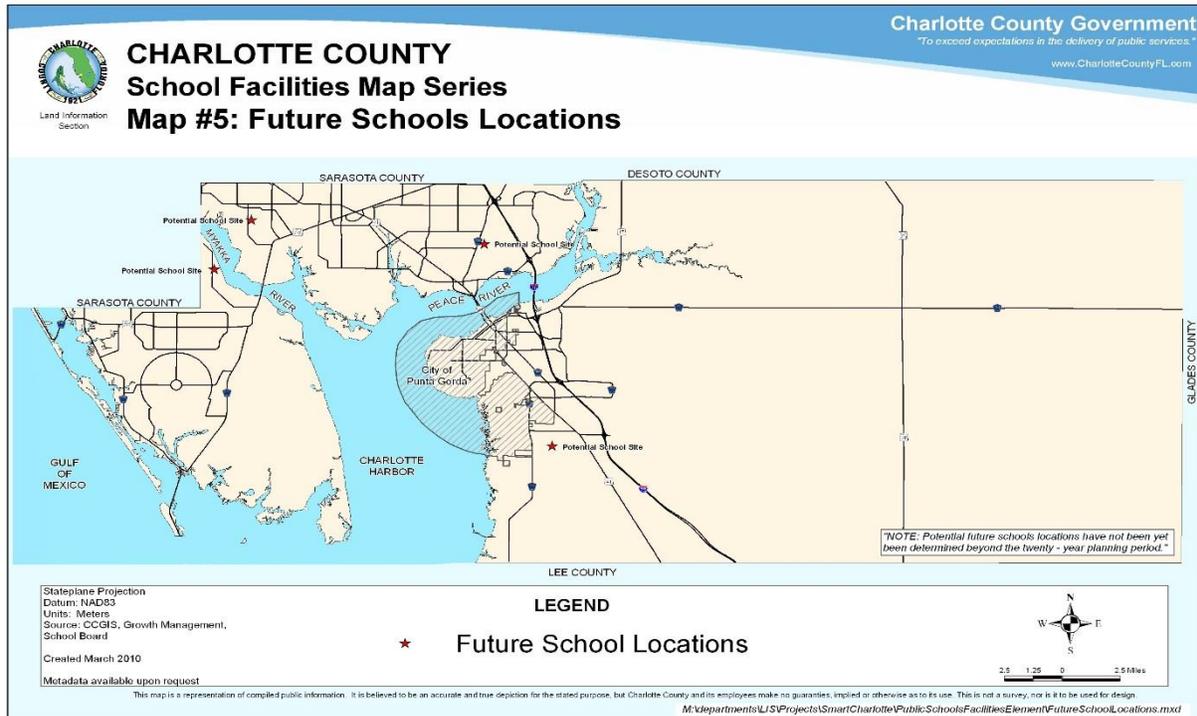
MAP 3: High School Boundary



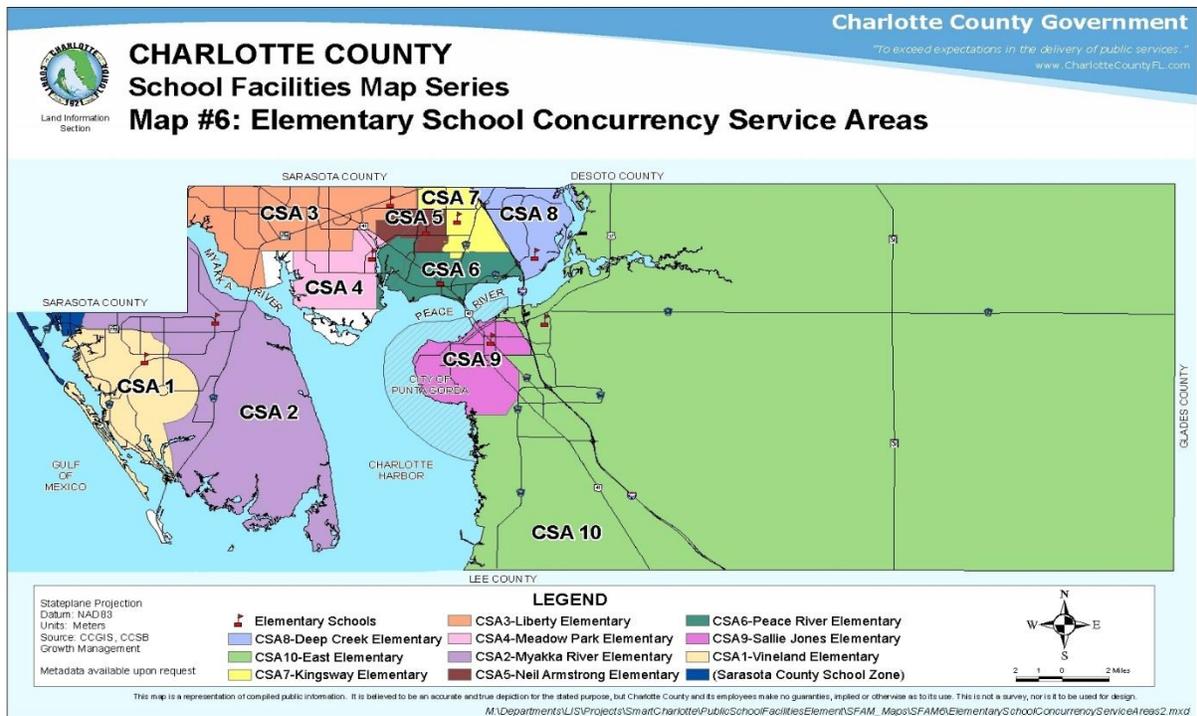
MAP 4: Ancillary Facilities Locations



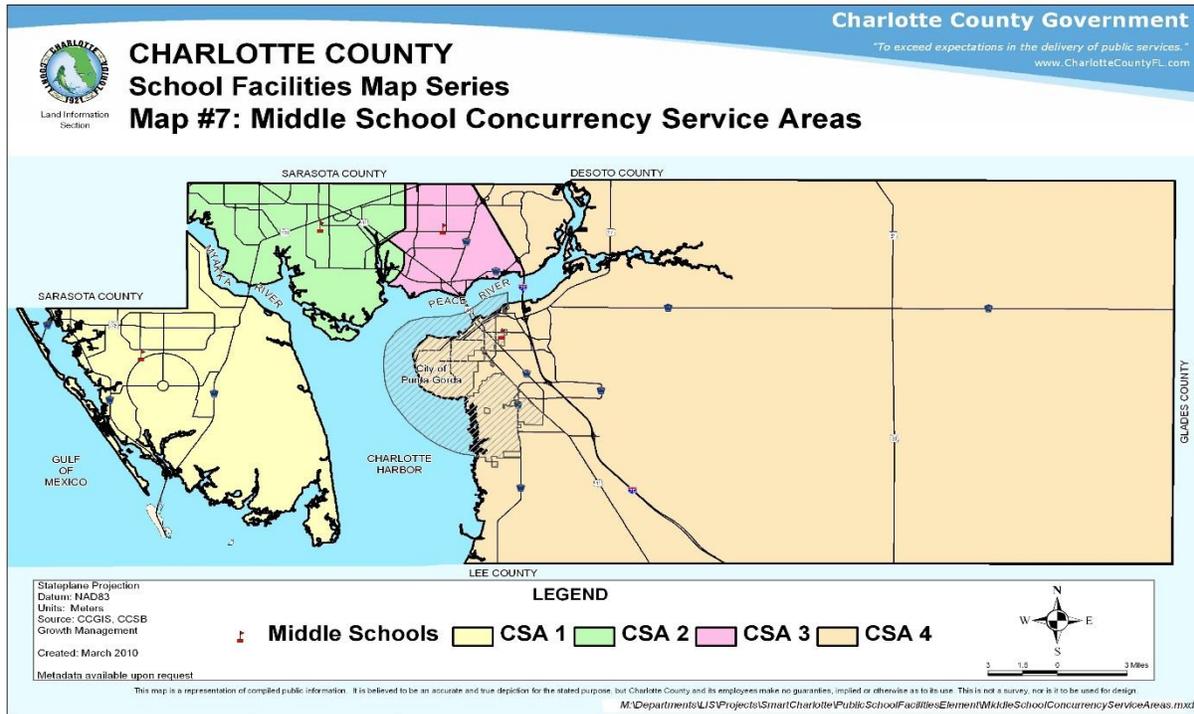
MAP 5: Future School Locations



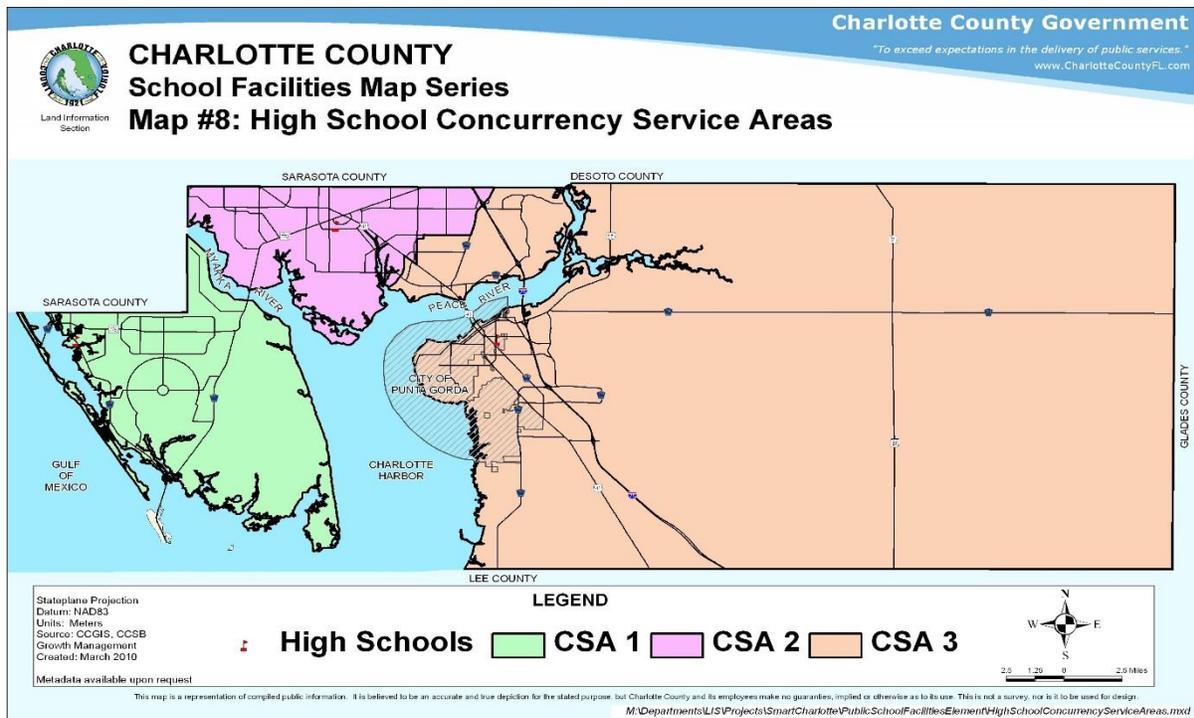
MAP 6: Elementary School Concurrency Service Areas



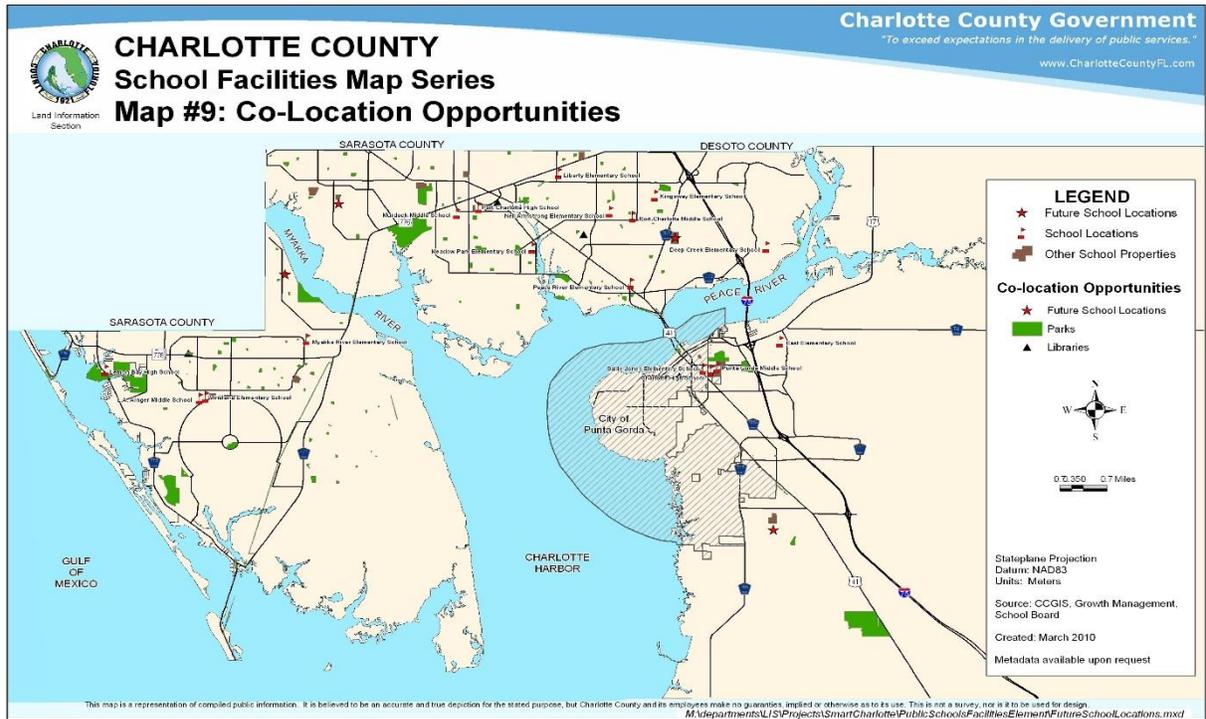
MAP 7: Middle School Concurrency Service Areas



MAP 8: High School Concurrency Service Areas



MAP 9: Co-Location Opportunities



Appendix #3 - Charlotte County Educational Facilities Five-Year Plant Survey

EDUCATIONAL PLANT FIVE YEAR SURVEY REPORT

District: CHARLOTTE COUNTY SCHOOL DISTRICT
Survey: Number 6 - Version 1
Survey Status: Active Approved

EDUCATIONAL PLANT FIVE YEAR SURVEY REPORT

District:

8-CHARLOTTE COUNTY SCHOOL DISTRICT

Survey:

Survey: 6 - Version: 1

Status:

Active Approved

Section 1: Survey

EDUCATIONAL PLANT FIVE YEAR SURVEY REPORT

District: 8-CHARLOTTE COUNTY SCHOOL DISTRICT **Survey:** Survey: 6 - Version: 1 **Status:** Active Approved

District: CHARLOTTE COUNTY SCHOOL DISTRICT
Survey: Number 6 - Version 1
Description: 2023 Educational Plant Survey
Survey Open Date: 12/16/2022 11:34:15 AM
Board Approval Date: 5/9/2023 4:00:00 AM
Survey Expiration Date: 6/30/2028
DVE768 Approval Date: 3/7/2023 5:00:00 AM
Contact Name: Billy Williams
Contact Phone Number: 9416283324
Contact Email: billy.williams@yourcharlotteschools.net
Survey Notes:

Survey Status	Status Time	User
Active Approved	5/23/2023 10:02:30 AM	Fran Pickett

EDUCATIONAL PLANT FIVE YEAR SURVEY REPORT

District:

8-CHARLOTTE COUNTY SCHOOL DISTRICT

Survey:

Survey: 6 - Version: 1

Status:

Active Approved

PREFACE

Report of an educational plant survey, hereinafter also referenced as “survey,” conducted in accordance with the requirements of, and pursuant to specifications in, Article IX and Article XII of the Florida Constitution; Chapters 1001, 1011, and 1013, Florida Statutes (F.S.); State Requirements for Educational Facilities (SREF); and the Florida Building Code (FBC). This survey report describes the current educational plants and the estimated capital outlay needs resulting from a systematic study of present educational and ancillary plants. This study also addresses the future needs, including long range planning, to provide an appropriate educational program and services for each student based on projected capital outlay FTE’s (COFTE) approved or authorized for use by the Department of Education.

NOTE: All educational plant surveys are valid for five full years and expire on June 30 of the fifth full year from the beginning date of the survey. For example, a survey approved in October will be valid through the remaining fiscal year and for five full years beginning on the following July 1; effectively, this makes the survey approved in October valid for five years and eight months. By the same scenario, a survey approved in May will be valid through the remaining fiscal year and for five full years beginning on the following July 1; effectively, this makes the survey approved in May valid for five years and one month.

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District:

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Survey:

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Status:

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INTRODUCTION TO THE EDUCATIONAL PLANT SURVEY

Definition of an Educational Plant Survey

The educational plant survey is a systematic study of present educational and ancillary plants and the determination of future needs. The survey is not directly concerned with the instructional program but the relationship of educational plants to the instructional program is such that judgments regarding the instructional program are necessarily a part of an educational plant survey.

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Status:

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Purpose of an Educational Plant Survey

The construction of new educational facilities is a major undertaking even in school systems where such construction is a continuous process. If a 50-year capital investment is to be protected, the location, size, type of materials, arrangement of spaces, and other considerations, regarding each new facility or addition to an existing facility must be determined on the basis of reliable, factual data. To do otherwise would violate the trust of present and future generations of children and of taxpayers.

The purpose of an educational plant survey is to aid in formulating plans for housing the educational activities of students and staff of the school district for the next several years and the survey must consider the local comprehensive plan in its forecast strategies. The development of this plan must be based on a careful study of all available data regarding the current status of educational and ancillary facilities in relation to capital outlay full-time equivalency (COFTE) student membership and the projected changes in COFTE student membership. The intent of a regular, formal educational plant survey is to encourage the thoughtful, orderly development of a program for providing educational and ancillary plants to adequately house the educational and academic support activities of the district.

A formal educational plant survey is required by §1013.31, F.S., to be conducted every five years, but may be conducted as often as necessary. It is sometimes necessary to make changes to the survey recommendations in the interim. Local school administrators are responsible for a regular auditing of survey recommendations and for the initiation of the request for any necessary changes.

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Legal Basis for Educational Plant Surveys

When the Florida School Code of 1939 was developed, the importance of having a valid basis for a school building program was recognized by inclusion of the requirement that district school boards have periodic school plant surveys of building needs in the districts. The 1939 Code directed the district school superintendent to "recommend plans and procedures for having a survey made" and instructed the district boards to "approve and adopt a district-wide school building program...based on the recommendations of the survey."

The provisions in the 1939 Code for periodic school plant surveys were, for the most part, ineffective. No state financing program for school plants was in effect at that time. Further, the coming of World War II, and the resulting cessation of school plant construction, made any statutory provision relating to school plants meaningless.

When the Minimum Foundation Program law was enacted in 1947, the requirement for periodic school plant surveys was included. The law established that a Capital Outlay and Debt Service (CO&DS) annual allotment of \$400 per instruction unit had to be expended in accordance with a planned building program based on a school plant survey. It was at this point that Florida's school plant survey program became a meaningful and established operation.

In 1952, the Florida Constitution §9(d), Article XII, was amended to authorize the issuance of State Board of Education (SBE) bonds guaranteed by the Minimum Foundation Program CO&DS allocation. The SBE bond program led to major school construction activities and further strengthened the school plant survey program by requiring that bond proceeds be expended in accordance with survey recommendations.

In 1957, the Florida Legislature established the School Construction Fund which annually authorized an increase of \$200 per student in average daily attendance, subject to matching by local funds. School Construction Fund monies also had to be expended in accordance with the recommendations of a school plant survey. The program was continued with modifications by subsequent legislatures until 1972.

The 1972 Legislature enacted the School District Supplemental Capital Outlay Act as an interim measure pending the outcome of the proposed amendment to §9, Article XII of the Constitution. The amendment, which was ratified in the November 1972 general election, increased the CO&DS annual allotment from \$400 to \$600 per instruction unit in the school districts for the school fiscal year 1967-1968 plus \$800 for each "growth unit" since 1967-1968.

The 1973 Legislature established the Florida Educational Finance Act which provided funds for comprehensive school construction and debt service. The amount allocated to each school district was determined by formulas prescribed by the Legislature.

In 1974, the Florida Constitution, §9(a) (2), Article XII, was amended to authorize the issuance of state bonds guaranteed by revenues derived from gross receipts utility taxes for the state system of public education, including, but not limited to, institutions of higher learning, junior colleges, vocational-technical schools, and public schools, as defined by law.

Since 1974, regular changes have been made to statutory provisions and the Florida Constitution in regards to educational facilities, including the establishment of a state lottery where funding is specifically earmarked for education as a supplement to other state funding, and the capping of class sizes. The continual changes to educational laws and funding mechanisms are due, in part, to Florida's unrelenting effort to maintain and provide state-of-the art facilities to meet the demands of change for our schools programs and the expectations of our citizenry.

EDUCATIONAL PLANT FIVE YEAR SURVEY REPORT

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Method For Making Educational Plant Surveys

The board must arrange for an educational plant survey to be conducted either by district staff, through contractual agreement, or a combination of district staff and private vendors. A survey conducted by the Office of Educational Facilities is a cooperative process with staff from the Office of Educational Facilities and staff from school districts outside of the district being surveyed. Typically, the survey process will include, as a minimum:

- * Spot or grid maps showing the residence of all elementary, middle or junior high, and senior high school students, the school attended by each student, and the location of each school.
- * COFTE student membership trends of each school center for the past five years.
- * A floor plan for each building at each educational plant identifying each building and each room (space) by number as they appear in the Florida Inventory of School Houses (FISH).
- * A list of the construction projects under contract.
- * A statement of the policies of the board with respect to grade organization and the types and sizes of facilities to be provided for new elementary, middle or junior high, and senior high schools (facilities lists).
- * Other information that may affect building costs, population trends, and other related matters that may influence the district educational facilities building needs program.
- * The survey team members visit and evaluate each educational plant; student capacities are carefully evaluated at each school center.
- * The districtwide projection of students is distributed among the various existing school centers and any new school centers are recommended on the basis of past trends and the best judgment of both the District and the County Growth Management Office as to where growth is most likely to occur.
- * The survey team should make logical recommendations based on all relevant information available.

The survey is limited to the study of educational and ancillary plants owned or under long-term lease agreement by the school board. No comprehensive study is made of the instructional program and recommendations made for the improvement of the educational and ancillary plants of the district are not an evaluation of the instructional program. Recommendations, however, must be clearly associated with the relationship between educational facilities and instructional programs.

State-level Requirements

The survey report must include a recommended pattern for housing the student projection for a five-year period, including changes in utilization of existing school centers, phasing out of unsatisfactory facilities and/or school centers, additions at existing school centers, and construction of new school centers. Ancillary facilities should also be considered in the recommendations.

The broad, general state-level conditions that give directions to a survey are established as guidelines only insofar as feasible for application within a given district.

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-
- * School Size: Any school that is not large enough to justify a full-time principal, a media specialist, food service staff, and special instructional and clerical staff are economically inefficient and restrictive in program offering; simply stated, minimally sized schools are too expensive to operate if a district lacks sufficient financial resources to make such facilities a viable option. Generally, new school centers are not recommended for fewer than 400 students in elementary schools or 100 students per grade level in secondary schools. Where practical, existing schools that are below these sizes should be consolidated.
 - * Wooden Buildings: Generally, all wooden exterior buildings (other than relocatables) are considered unsatisfactory and are not assigned student capacity.
 - * Unsatisfactory Space: Generally, all wooden exterior buildings (other than relocatables) are considered unsatisfactory and are not assigned student capacity.

NOTE: Unsatisfactory space is typically designated as such due to compromising effects on the structural integrity, safety, or excessive physical deterioration of a building. Space condition should be the same, either satisfactory or unsatisfactory, for all rooms in a building with the exception of rooms reported in relocatable buildings that represent individual units. A space may be structurally unsound (unsatisfactory) and still be adequate in size.

- * Inadequate Space: Generally means that the size of space is not appropriate, sufficient, suitable, or lacks ability to meet the fitting requirements for instruction or instructional support, such as small classrooms or insufficient acreage for a school site. Inadequacy may be a condition brought on by changing standards, or increased enrollment causing overuse thereby resulting in undersized or unsuitable circumstances.

NOTE: Inadequate space is typically designated as such by the capital outlay classifications (COC) C-3 and C-7. Inadequate is a designation for an entire facility, not just a building or room. A space or building may be structurally sound (satisfactory) and still be inadequate.

- * Relocatable Building: Facilities designed and built to be moved from one school to another are recognized as providing valuable flexibility.
- * Student Station: A student station is the area necessary for a student to engage with a teacher in appropriate subject matter educational (learning) activities. The size of this area will vary with the particular type of activity and by grade level. A laboratory or shop in which the student must move about requires more area per student than a regular classroom where the student remains seated at a desk. The total student stations at a school center are used to determine the capacity of the school.
- * Student Capacity: The maximum number of students that should be housed in a facility. In an elementary school, students are typically assigned to one classroom throughout the day and student capacity for elementary schools equals the student stations. However, in middle and secondary schools, students usually move from classroom to classroom to participate in different instructional subject matter, which interjects scheduling as a factor in calculating capacity. Experience has shown that the number of students in a secondary school is a major factor for determining the efficiency of space utilization that may be expected at a school.

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* Utilization Factor: Used to determine “capacity” which is the number of students that may be housed in a facility at any given time based on a utilization percentage of the total number of existing satisfactory student stations:

Type School	Utilization Factor Percentage x	Satisfactory Student Stations
Elementary	100%	all
Middle & Junior High	90%	all
Senior High	70%	300 or less
	75%	301-600
	80%	601-900
	85%	901-1200
	90%	1201-1500
	95%	1501 - and above
Combination Schools	90%	all
Exceptional Student Centers	100%	all
Alternative Education Centers	100%	all
Designated Area Vocational Centers	120%	all
Designated Adult Centers	150%	all

* Initial and Ultimate Student Capacity: In the recommendations for building a new school center, the initial capacity assigned is the capacity necessary to house the students anticipated to enroll at the school by the end of the survey projection period. The ultimate capacity is usually the maximum capacity school of that type based on applicable district policies (facilities lists). The establishment of an ultimate desirable capacity makes it possible to plan the initial construction within the framework of the ultimate size school—meaning, building core facilities such as media, cafeteria, administration, circulation, and other auxiliary spaces to the full school size and then adding classrooms as the student population projections increase to a level that warrants additional classroom space.

NOTE: Educational plant survey COFTE student projections are determined by the Office of Economic and Demographic Research (EDR). Each five-year survey is based on COFTE projections that are five (5) full years from the official beginning of the survey period, which is July 1 of the first full year of the survey.

* Use of State and Local Funds for Recommended Facilities: The recommendations made in the survey report are intended, in total, to provide adequate facilities for all of the students projected to be enrolled within the 5-year survey period. The priority systems established in statutes and rules define the eligibility for the expenditure of funds.

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NOTE: Educational plant survey costs for student stations are determined by the Office of Economic and Demographic Research (EDR). Each five-year survey is based on cost factors that are 31 months (January, the midway point of the five-year survey period) from the official beginning of the survey period, which is July 1 of the first full year of the survey. All new capacity construction uses the appropriate grade level student station cost factors; the cost per square foot for new construction, remodeling, and renovation is based on actual statewide average construction cost data with the EDR cost index increase applied to use the same 31 months mid-point of the survey costs for planning purposes. This cost estimate process is applied uniformly to all surveys in all districts so that consistent estimates can be made. Actual costs are reported yearly in the 5-year district facilities work program annual budget.

District School Board Policies and Prerogatives

State funds alone usually are not enough to complete the recommended school plant construction program that will be identified in an educational plant survey. To ensure that all capital outlay funds are used for the best and most efficient purposes, the educational plant survey team should collaborate with the professional and instructional staff of the district on a plan for meeting the projected school plant needs for the next several years.

Some of the specific local board policies and prerogatives that generally apply to the survey report are:

- * Actual assignment of students to school centers in the county as authorized and directed by §1003.02, F.S.;
- * Facilities comprising a standard school plant for each grade grouping;
- * Square footage and special features of each instructional component (state minimums must be met);
- * Special facilities at a school center;
- * Level of custodial service;
- * Level of maintenance service;
- * Level of service indicators for local comprehensive planning;
- * Type of climatic control.

Guide to Capital Outlay Classification (COC)

Educational plants are identified by recommended type of facility for capital outlay expenditures. The COC of educational plants determines the extent to which certain funds may be used for capital improvements, subject to applicable Florida Statutes and SREF standards dealing with budgeting and in some cases priority ratings. The COC of an educational plant can only be assigned or changed by an educational plant survey recommendation made in compliance with all applicable laws, rules, and policies.

The COC is grouped into categories with applicable standards to guide the assignment of the appropriate classification:

C-1: An educational plant that is recommended for continued use. Generally, this includes:

- * Adequate site,
- * Satisfactory building(s),
- * Projected membership within desired size range for the type of school,
- * Recommended new educational plant.

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C-2: An educational plant that is in a period of transition with evidence insufficient to recommend replacement or consolidation, and typically new construction is not recommended for this COC. Generally, this includes:

- * Inadequate site and/or inadequate building(s),
- * Declining or static enrollment,
- * An educational plant that probably would be recommended for consolidation if not for excessive distance required for student transportation.

C-3: An educational plant that is substandard in one or more major aspects. Generally, this includes:

- * Inadequate site and/or unsatisfactory building(s),
- * Declining or static enrollment to a level indicating that the needs of students can better and more economically be served at other educational plants,
- * Abandoned educational plants not currently housing students.

NOTE: Educational plants assigned a C-3 COC and used to house students should be closed when adequate facilities are available elsewhere. Facilities assigned a C-3 COC do not generate PECO maintenance funds even when the facility contains satisfactory space.

C-6: Ancillary facility recommended for continued use. Generally, this includes:

- * Adequate site,
- * Satisfactory building(s),
- * Recommended new site and/or facilities.

C-7: Ancillary facility is substandard. Generally, this includes:

- * Inadequate site and/or unsatisfactory building(s),
- * Abandoned facilities not currently being used.

NOTE: Facilities assigned a C-7 COC that are in current use should be closed when adequate facilities are available elsewhere. Facilities assigned a C-7 COC do not generate PECO maintenance funds even when the facility contains satisfactory space.

C-9: Any district owned facility leased to an entity for use by the lessee for any purpose, including educational, but is not used by the district during the normal school hours of operation.

NOTE 1: Facilities assigned a C-9 COC do not generate PECO maintenance funds.

NOTE 2: Facilities assigned a C-9 COC are to be counted in the district's inventory of available space and may be considered in the determination of new construction needs.

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School centers are usually classified by standard grade groupings (K-5, 6-8, and 9-12), even though a school may have only one or two of the grades present. A school center may be classified as a combination school and recommended to house more than one grade grouping, e.g. grade group K-8, grade group 6-12, or grade group K-12.

Whenever it is feasible, the survey should contain recommendations to upgrade and/or remodel/renovate existing educational plants that are classified as C-1 to meet the district's educational facilities standards for spaces and school size based on the districts adopted facilities lists for each grade grouping.

GUIDELINES FOR SCHOOL PLANT DEVELOPMENT

School Plant Planning

Planning a school plant, either a complete new school or an addition to an existing school, is a long and complex process when properly done. Remodeling and renovation of existing space can also be very time consuming to plan when all potential options for upgrading or replacement considerations are made. Suggestions made in this section are intended to provide useful, basic information and are not an exhaustive description of all available options for planning or meeting the facilities needs of a district school board.

School Size

Generally, new school centers are not recommended for fewer than 400 students in elementary schools or 100 students per grade level in secondary schools. Any school that is not large enough to justify a full-time principal, a media specialist, food service staff, and special instructional and clerical staff are economically inefficient and restrictive in program offerings. Schools that are minimally sized are very expensive to operate.

The number of students in a school is a major factor in determining the efficiency of space utilization; schools that are too small do not offer optimal instructional standards or provide economically advantageous structures. Just like small schools are not economical, very large schools are not frugal to build, maintain, or staff. The logistics of managing and maintaining an overly large school can outweigh the reasons for building mega structures (such as more extensive program offerings in science or performing arts—these functions may be offered through magnet schools, thereby meeting a districtwide or area need without the burden of managing an overly large school reconfigured to offer such services).

Optimally, elementary schools should be planned for about 800 students, middle schools should be planned for about 1,200 students, and senior high schools should be planned for about 2,000 students. Flexibility and program offerings that allow schools to offer a more educationally diverse program or structural configurations that can provide significant economic rewards should always be considered when planning new schools. However, experience has shown that by modifying elementary schools sizes by more than 25% above or below the 800 student mark is not usually cost effective nor educationally practical. Secondary schools can sometimes be subjected to 25% to 50% modifications from the recommended median point and still be practical and efficient for both educational offerings and cost savings. Neither small or large schools provide cost saving benefits for construction nor for day-to-day operations; therefore, limiting the size of schools to near average size is usually preferable and more practical.

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Educational Facilities Planning

The basic concept behind educational facilities planning is a simple one. A school building is primarily a school and secondarily a building. If the “school” is not planned in terms of its purposes, its scope, and its programs, the resulting structure will almost certainly just be a “building.” No architect, regardless of talent or experience in school plant design, can plan a school without guidance from the educators who will use it.

The educational facilities planning process is slow and difficult; planning that does not consider school needs beyond the immediate future places an undue burden on the present and future generations of students and taxpayers. Equally as important as long-range planning, no board should commit local and state revenues for a new educational plant that has not been planned by educators. Although the detailed procedures for educational facilities planning will vary considerably from school to school, the ultimate responsibility for the future rests with those professionals who plan today.

School Plant Design

An architect is responsible for designing the building to house the school program developed through the educational facilities planning process. Usually, the architect participates in that process so that educational planning and design do not constitute separate and distinct steps.

The architect uses other specialists in designing the building and the system(s) it will contain; for example, structural engineers, heating and cooling specialists, electrical engineers, and environmental specialists should be involved in the total process. Some broad guidelines appropriate to school building design are:

- * A site (plot) plan should be developed to show the most effective use of the site for present needs and to guide future expansion. The site design and orientation should show awareness of the principles of “Crime Prevention Through Environmental Design” (CPTED) including natural access control, natural surveillance, and territorial reinforcement;
- * A building should be functional in design; it should meet the needs of and facilitate the attainment of the designed or planned program of the school;
- * The building must be made safe and healthful for all students and school staff personnel by observing all safety and sanitary regulations appropriate to school plants;
- * A balance should be achieved between quality and economy in construction and the anticipated maintenance and operation of the plant;
- * A building should be designed to permit economical expansion both in terms of additional classrooms and special facilities which will eventually serve the ultimate capacity of the school; e.g., media centers, cafeterias, circulation, sanitation, utilities, and administration should be built to their ultimate maximum sizes if additional classrooms are going to be needed for future expansion;
- * Adequate lighting, natural and artificial, should be provided for all instructional spaces;
- * A building should be designed to control the transient noise level; the objective in sonic design of instructional spaces is to secure the best hearing and speaking conditions without adversely affecting the surrounding or adjacent instructional programs;
- * Thermal conditioning of school spaces should be provided by economically designed systems that also render long-term cost savings in maintenance and operations.

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Florida Inventory of School Houses (FISH)

The district's educational plant survey extracts facilities data from FISH; therefore, if FISH is not current and accurate, the educational plant survey cannot be a valid assessment of needs. The district's facilities inventory may be corrected at any time when new additions or remodeling occurs, during a validation study conducted by the district or OEF, or as the result of an educational plant survey. FISH is the official inventory of the district's educational facilities. It is the responsibility of the district to maintain an updated inventory. Changes to FISH are subject to review by OEF for compliance with statutory and rule provisions as well as compliance with educational plant survey recommendations.

NOTE: FISH data is imported into the educational plant survey as it exists the moment the survey is created. When a complete new survey is started, the FISH data is imported and does not change even if FISH changes are subsequently made. When a supplemental/spot survey is created, FISH data is imported into the spot survey as it exists for only the selected facilities as of the moment the spot survey is created; this process allows districts to update FISH and then do an updated survey using current FISH data.

School Sites

Before a site is purchased or funds are encumbered for a site, it must meet the criteria established by §1013.36, F.S. Notably, the law requires a school board to coordinate site planning and selection with affected county and city governments to ensure consistency with local land-use plans. This coordination process is detailed in the interlocal agreement between the school board and the general-purpose local governments pursuant to §1013.33(2), F.S.

The choice of sites for new schools is critical to the overall development of a school plant program. In general, new sites should:

- * Provide adequate space for school buildings;
- * Provide adequate off-street parking and off-street loading/unloading;
- * Provide adequate playground area.

In addition, new sites should generally be located to:

- * Minimize transportation costs and provide safe access from neighborhoods to the school;
- * Avoid sites where adjacent land uses may allow the location of undesirable commercial enterprises or industrial activities near the school;
- * Prevent the location of a site adjacent to, or near, high voltage power transmission lines or in an airport approach flight path;
- * Maximize proximity to residential areas and seek to collocate district educational facilities with other public facilities, such as parks, libraries, and community centers.

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Section 2: Facility Lists

EDUCATIONAL PLANT FIVE YEAR SURVEY REPORT

District:

8-CHARLOTTE COUNTY SCHOOL DISTRICT

Survey:

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Status:

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FACILITIES LISTS

Minimum Space Requirements

The Facility Lists component identifies the standard schools programs by grouping and listing the classrooms and support spaces that districts normally consider the most ideal for meeting the districts needs. These lists usually are a combination of elementary, middle, senior high, ancillary, and other special school centers such as exceptional students, alternative, and various types of combination schools, e.g. K-8, K-12, 6-12, etc.

All board approved and adopted facilities lists must conform to standards established in SREF. The facilities lists in EFIS are based on net square footage per space; the gross square footage in a facilities list for new construction is determined by adding a standardized percentage of the net square footage for all auxiliary and support spaces. Elementary schools have 27 percent added for net-to-gross conversions; middle schools have 32 percent added for net-to-gross conversions; and high schools have 34 percent added for net-to-gross conversions. An additional 6 percent is added to each type school for mechanical spaces.

Educational plant survey costs for student stations are determined by the Office of Economic and Demographic Research (EDR). Each five-year survey is based on cost factors that are 31 months (January, the midway point of the five-year survey period) from the official beginning of the survey period, which is July 1 of the first full year of the survey. All new capacity construction uses the appropriate grade level student station cost factors; the cost per square foot for new construction, remodeling, and renovation is based on actual statewide average construction cost data with the EDR cost index increase applied to use the same 31 months mid-point of the survey costs for planning purposes. This cost estimate process is applied uniformly to all surveys in all districts so that consistent estimates can be made. Actual costs are reported yearly in the 5-year district facilities work program annual budget.

Costs for remodeling recommendations are typically based on one-half the cost of new construction, but may vary significantly based on the type of remodeling. Costs for renovation recommendations are typically based on one-third the cost of new construction, and like remodeling costs, may vary significantly based on the renovation project. All cost estimates are best judgment approximations and may vary significantly between projects. Before entering into the planning phase on projects, the district should have a professional review of the estimated cost and assure that the current Uniform Building Code standards are applied when the cost estimates are made.

Cost estimates and recommendations for maintenance and operations of educational plants safety and sanitation deficiencies are not included in this survey. Boards should follow the requirements of §1013.12, F.S., to meet the needs in these areas.

Facilities recommended in accordance with the approved facilities lists at existing or recommended new schools may need to be changed as programs change.

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8-CHARLOTTE COUNTY SCHOOL DISTRICT

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Building New Schools Or Additions To Existing Schools Relative To Approved Facility Lists

All facility lists are developed and approved by a district school board to establish the district's standard schools by type and for the ideal size of schools. These lists, once approved by the board and by the Department, are used in the educational plant survey process to identify the space needs of existing schools (comparing FISH and COFTE to the facility lists) and for building new schools. Any new schools constructed or the expansion of existing schools must be relative to the approved facility list and the classroom capacity must not exceed the projected COFTE for that/those schools. When building a new school center or adding classroom capacity to an existing school, the capacity of the instructional spaces (classrooms) for the school may not exceed the projected COFTE planned for the school in the out-year of the survey even though the facility list may be for a larger number of students. The school's core facilities should be built to the full size of the facility list if it is reasonably anticipated that the school will eventually serve the number of students in the facility list; however, the classrooms must initially only be built to serve the projected COFTE; to do otherwise would violate the public trust and abuse tax-payer money.

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Level:	ELEMENTARY (PK - 05)	Gross Sq. Feet:	125,235
Target Number of Stations:	868	Utilization:	1.000
Total Stations:	868	Acres Required:	11
Total Capacity:	868		

Spaces	Design	Grades	Description	NSF / Space	Total NSF	Cap. / Space	Total Stns.	Total GSF
29	1	PK - 03	PRIMARY CLASSROOM (K-3)	882	25,578	18	522	32,484
13	2	04 - 08	INTERMEDIATE/MIDDLE CLASSROOM (4-8)	858	11,154	22	286	14,165
3	10	PK - 03	PRIMARY SKILLS LAB (K-3)	882	2,646	18	0	3,360
1	13	PK - 05	ELEMENTARY P E STORAGE	315	315	1	0	400
1	14	PK - 05	ELEMENTARY COVERED PLAY AREA	3,096	3,096	86	0	3,931
6	40	PK - 12	RESOURCE ROOM	290	1,740	10	0	2,209
2	50	PK - 05	ART - ELEMENTARY	1,000	2,000	22	0	2,540
2	55	PK - 05	MUSIC - ELEMENTARY	1,000	2,000	22	0	2,540
2	60	PK - PK	E S E PRE-K	475	950	5	10	1,206
2	61	PK - 12	E S E PART-TIME	975	1,950	15	30	2,476
2	62	PK - 12	E S E FULL-TIME	950	1,900	10	20	2,413
3	65	PK - 12	E S E RESOURCE	380	1,140	4	0	1,447
2	66	PK - 12	E S E SUPPLEMENTARY INSTRUCTION	50	100	2	0	127
1	300	PK - VE	PRINCIPAL/DIRECTOR OFFICE	250	250	0	0	317
8	301	PK - VE	ASSISTANT PRINCIPAL/OTHER OFFICE	175	1,400	0	0	1,778
1	302	PK - VE	BOOKKEEPING OFFICE	125	125	0	0	158
2	303	PK - VE	SECRETARIAL SPACE	158	316	0	0	401
1	304	PK - VE	RECEPTION AREA	731	731	43	0	928
1	305	PK - VE	PRODUCTION WORKROOM	344	344	43	0	436
1	306	PK - VE	CONFERENCE ROOM	602	602	43	0	764
1	307	PK - VE	CLINIC	258	258	43	0	327
1	308	PK - VE	GENERAL SCHOOL STORAGE	430	430	43	0	546
1	309	PK - VE	VAULT/STUDENT RECORDS	258	258	43	0	327
1	310	PK - VE	SCHOOL STORE	86	86	43	0	109
1	311	PK - VE	STUDENT ACTIVITIES	430	430	43	0	546
1	312	PK - VE	COMPUTER AREA	129	129	43	0	163
2	313	PK - VE	CAREERS ROOM	258	516	43	0	655
3	314	PK - VE	ITINERANT OFFICE	125	375	0	0	476
1	315	PK - VE	TEACHER PLANNING OFFICE	1,720	1,720	86	0	2,184

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Spaces	Design	Grades	Description	NSF / Space	Total NSF	Cap. / Space	Total Stns.	Total GSF
1	316	PK - VE	TEACHER LOUNGE/DINING	344	344	86	0	436
1	330	PK - VE	CUSTODIAL RECEIVING	1,290	1,290	86	0	1,638
1	333	PK - VE	FLAMMABLE STORAGE	155	155	0	0	196
1	334	PK - VE	CUSTODIAL EQUIPMENT STORAGE	500	500	0	0	635
1	340	PK - VE	DINING AREA	3,440	3,440	86	0	4,368
1	341	PK - VE	KITCHEN & SERVING AREA	3,784	3,784	86	0	4,805
1	349	PK - VE	KITCHEN CHAIR STORAGE	172	172	43	0	218
1	361	PK - VE	MULTIPURPOSE ROOM (DINING)	2,666	2,666	86	0	3,385
1	362	PK - VE	MULTIPURPOSE ROOM CHAIR STORAGE	172	172	86	0	218
1	363	PK - VE	STAGE	990	990	1	0	1,257
1	364	PK - VE	STAGE STORAGE	430	430	86	0	546
1	365	PK - VE	STAGE DRESSING ROOM (MALE)	215	215	43	0	273
1	366	PK - VE	STAGE DRESSING ROOM (FEMALE)	215	215	43	0	273
1	367	PK - VE	CONTROL BOOTH/PROJECTION ROOM	100	100	1	0	127
1	368	PK - VE	TEXTBOOK STORAGE	301	301	43	0	382
1	380	PK - VE	LIBRARY (READING ROOM/STACKS)	3,182	3,182	86	0	4,041
1	381	PK - VE	MEDIA TECHNICAL PROCESSING	344	344	86	0	436
1	382	PK - VE	PROFESSIONAL LIBRARY	344	344	86	0	436
1	383	PK - VE	AUDIO VISUAL STORAGE	516	516	86	0	655
1	384	PK - VE	PERIODICAL STORAGE	172	172	86	0	218
1	385	PK - VE	CLOSED CIRCUIT TV LAB	602	602	86	0	764
1	386	PK - VE	CLOSED CIRCUIT STORAGE	430	430	86	0	546
1	387	PK - VE	MEDIA PRODUCTION LAB	430	430	86	0	546
1	388	PK - VE	MEDIA COPYING ROOM	172	172	86	0	218
1	389	PK - VE	MEDIA SMALL GROUP ROOM	86	86	43	0	109
1	390	PK - VE	MEDIA GROUP PROJECTS/INSTRUCTION	430	430	86	0	546
1	391	PK - VE	MEDIA MAINTENANCE/REPAIR	86	86	43	0	109
	806		REFERENCE	100	200	0	0	254
	808		MATERIAL STORAGE	100	200	0	0	254
	808		MATERIAL STORAGE	100	600	0	0	762
	808		MATERIAL STORAGE	100	300	0	0	381
	808		MATERIAL STORAGE	100	1,300	0	0	1,651
	808		MATERIAL STORAGE	100	2,900	0	0	3,683
	808		MATERIAL STORAGE	100	200	0	0	254

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	808		MATERIAL STORAGE	100	300	0	0	381
	808		MATERIAL STORAGE	100	200	0	0	254
	808		MATERIAL STORAGE	100	200	0	0	254
	808		MATERIAL STORAGE	100	200	0	0	254
	808		MATERIAL STORAGE	100	200	0	0	254
	811		OUTSIDE STORAGE	50	1,450	0	0	1,841
	811		OUTSIDE STORAGE	50	650	0	0	825
	812		PROJECT STORAGE	150	300	0	0	381
	813		STUDENT STORAGE	40	120	0	0	152
	813		STUDENT STORAGE	40	80	0	0	101
	813		STUDENT STORAGE	40	80	0	0	101
	813		STUDENT STORAGE	40	80	0	0	101
	813		STUDENT STORAGE	40	1,160	0	0	1,473
	813		STUDENT STORAGE	40	120	0	0	152
	814		STUDENT RESTROOM (BOTH SEXES)	60	180	0	0	228
	814		STUDENT RESTROOM (BOTH SEXES)	60	1,740	0	0	2,209
	815		STUDENT RESTROOM (MALE)	35	455	0	0	577
	815		STUDENT RESTROOM (MALE)	35	70	0	0	88
	815		STUDENT RESTROOM (MALE)	35	70	0	0	88
	816		STUDENT RESTROOM (FEMALE)	35	70	0	0	88
	816		STUDENT RESTROOM (FEMALE)	35	70	0	0	88
	816		STUDENT RESTROOM (FEMALE)	35	455	0	0	577
	817		STUDENT RESTROOM & BATH	110	220	0	0	279
	817		STUDENT RESTROOM & BATH	110	220	0	0	279
	831		MUSIC PRACTICE ROOM	70	140	0	0	177

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Level: MIDDLE (06 - 08)

Gross Sq. Feet: 156,570

Target Number of Stations: 1,021

Utilization: 0.900

Total Stations: 1,029

Acres Required: 13

Total Capacity: 926

Spaces	Design	Grades	Description	NSF / Space	Total NSF	Cap. / Space	Total Stns.	Total GSF
27	2	04 - 08	INTERMEDIATE/MIDDLE CLASSROOM (4-8)	858	23,166	22	594	30,579
1	11	04 - 08	INTERMEDIATE/MIDDLE SKILLS LAB (4-8)	858	858	22	22	1,132
3	20	04 - 08	INTERMEDIATE/MIDDLE SCIENCE DEMO (4-8)	814	2,442	22	66	3,223
3	21	04 - 08	INTERMEDIATE/MIDDLE SCIENCE LAB (4-8)	1,122	3,366	22	66	4,443
4	40	PK - 12	RESOURCE ROOM	290	1,160	10	0	1,531
1	51	04 - 08	ART - MIDDLE	1,260	1,260	30	30	1,663
2	61	PK - 12	E S E PART-TIME	975	1,950	15	30	2,574
2	62	PK - 12	E S E FULL-TIME	950	1,900	10	20	2,508
1	63	PK - 12	E S E VOCATIONAL	1,140	1,140	12	12	1,504
1	64	PK - 12	E S E PT/OT LAB	475	475	5	0	627
3	65	PK - 12	E S E RESOURCE	380	1,140	4	0	1,504
2	66	PK - 12	E S E SUPPLEMENTARY INSTRUCTION	100	200	2	0	264
3	70	PK - 12	E S E ITINERANT	200	600	4	0	792
1	75	06 - 12	VOCAL MUSIC CLASS (MIDDLE-SR HIGH)	1,425	1,425	25	25	1,881
1	76	06 - 12	BAND CLASS (MIDDLE-SR HIGH)	2,000	2,000	40	40	2,640
1	81	06 - 12	RECORDING ROOM	225	225	5	0	297
1	90	06 - 12	P E DRESSING ROOM (MALE)	552	552	46	0	728
1	91	06 - 12	P E DRESSING ROOM (FEMALE)	552	552	46	0	728
1	92	06 - 12	P E LOCKER ROOM (MALE)	92	92	46	0	121
1	93	06 - 12	P E LOCKER ROOM (FEMALE)	92	92	46	0	121
1	94	06 - 12	P E SHOWER (MALE)	92	92	46	0	121
1	95	06 - 12	P E SHOWER (FEMALE)	92	92	46	0	121
1	96	06 - 12	P E DRYING AREA (MALE)	92	92	46	0	121
1	97	06 - 12	P E DRYING AREA (FEMALE)	92	92	46	0	121
1	98	06 - 12	P E STORAGE (MIDDLE-SR HIGH)	414	414	46	0	546
1	99	06 - 12	P E TEACHERS SHOWER (MALE)	22	22	1	0	29
1	100	06 - 12	P E TEACHERS SHOWER (FEMALE)	22	22	1	0	29
1	110	06 - 12	P E MULTIPURPOSE ROOM (MIDDLE-SR HIGH)	1,050	1,050	1	0	1,386
1	111	06 - 09	JR HIGH GYMNASIUM	5,800	5,800	80	80	7,656

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Spaces	Design	Grades	Description	NSF / Space	Total NSF	Cap. / Space	Total Stns.	Total GSF
1	113	06 - 12	GYMNASIUM SEATING	2,944	2,944	92	0	3,886
1	114	06 - 12	P E LAUNDRY	92	92	46	0	121
1	115	06 - 12	P E FIRST AID	92	92	46	0	121
1	116	06 - 12	P E TRAINING ROOM	250	250	1	0	330
1	117	06 - 12	P E WEIGHT ROOM	1,000	1,000	1	0	1,320
1	118	06 - 12	P E WRESTLING ROOM	1,680	1,680	1	0	2,217
1	120	06 - 12	GYMNASIUM STORAGE	138	138	46	0	182
1	210	06 - 09	BUSINESS EXPLORATION LAB	1,210	1,210	22	22	1,597
1	240	06 - 09	TECHNOLOGY/INDUSTRY EXPLORATION LAB	2,090	2,090	22	22	2,758
1	300	PK - VE	PRINCIPAL/DIRECTOR OFFICE	250	250	0	0	330
10	301	PK - VE	ASSISTANT PRINCIPAL/OTHER OFFICE	175	1,750	0	0	2,310
1	302	PK - VE	BOOKKEEPING OFFICE	125	125	0	0	165
3	303	PK - VE	SECRETARIAL SPACE	158	474	0	0	625
1	304	PK - VE	RECEPTION AREA	782	782	46	0	1,032
1	305	PK - VE	PRODUCTION WORKROOM	368	368	46	0	485
1	306	PK - VE	CONFERENCE ROOM	644	644	46	0	850
1	307	PK - VE	CLINIC	276	276	46	0	364
1	308	PK - VE	GENERAL SCHOOL STORAGE	460	460	46	0	607
1	309	PK - VE	VAULT/STUDENT RECORDS	276	276	46	0	364
1	310	PK - VE	SCHOOL STORE	92	92	46	0	121
1	311	PK - VE	STUDENT ACTIVITIES	460	460	46	0	607
1	312	PK - VE	COMPUTER AREA	138	138	46	0	182
1	313	PK - VE	CAREERS ROOM	276	276	46	0	364
3	314	PK - VE	ITINERANT OFFICE	125	375	0	0	495
1	315	PK - VE	TEACHER PLANNING OFFICE	1,840	1,840	92	0	2,428
1	316	PK - VE	TEACHER LOUNGE/DINING	368	368	92	0	485
1	330	PK - VE	CUSTODIAL RECEIVING	1,380	1,380	92	0	1,821
1	333	PK - VE	FLAMMABLE STORAGE	155	155	0	0	204
1	334	PK - VE	CUSTODIAL EQUIPMENT STORAGE	500	500	0	0	660
1	340	PK - VE	DINING AREA	3,680	3,680	92	0	4,857
1	341	PK - VE	KITCHEN & SERVING AREA	4,048	4,048	92	0	5,343
1	349	PK - VE	KITCHEN CHAIR STORAGE	184	184	46	0	242
1	351	06 - 12	MIDDLE/SR HIGH COVERED PATIO	3,312	3,312	92	0	4,371
1	361	PK - VE	MULTIPURPOSE ROOM (DINING)	2,852	2,852	92	0	3,764

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1	362	PK - VE	MULTIPURPOSE ROOM CHAIR STORAGE	184	184	92	0	242
1	363	PK - VE	STAGE	990	990	1	0	1,306
1	364	PK - VE	STAGE STORAGE	460	460	92	0	607
1	365	PK - VE	STAGE DRESSING ROOM (MALE)	230	230	46	0	303
1	366	PK - VE	STAGE DRESSING ROOM (FEMALE)	230	230	46	0	303
1	367	PK - VE	CONTROL BOOTH/PROJECTION ROOM	100	100	1	0	132
1	368	PK - VE	TEXTBOOK STORAGE	322	322	46	0	425
1	369	06 - VE	STUDENT PERSONAL STORAGE	460	460	92	0	607
1	370	06 - VE	LOBBY	460	460	46	0	607
1	371	06 - VE	CONCESSIONS	200	200	1	0	264
1	372	06 - VE	TICKET BOOTH	30	30	1	0	39
1	380	PK - VE	LIBRARY (READING ROOM/STACKS)	3,404	3,404	92	0	4,493
1	381	PK - VE	MEDIA TECHNICAL PROCESSING	368	368	92	0	485
1	382	PK - VE	PROFESSIONAL LIBRARY	368	368	92	0	485
1	383	PK - VE	AUDIO VISUAL STORAGE	552	552	92	0	728
1	384	PK - VE	PERIODICAL STORAGE	184	184	92	0	242
1	385	PK - VE	CLOSED CIRCUIT TV LAB	644	644	92	0	850
1	386	PK - VE	CLOSED CIRCUIT STORAGE	460	460	92	0	607
1	387	PK - VE	MEDIA PRODUCTION LAB	460	460	92	0	607
1	388	PK - VE	MEDIA COPYING ROOM	184	184	92	0	242
1	389	PK - VE	MEDIA SMALL GROUP ROOM	92	92	46	0	121
1	390	PK - VE	MEDIA GROUP PROJECTS/INSTRUCTION	460	460	92	0	607
1	391	PK - VE	MEDIA MAINTENANCE/REPAIR	92	92	46	0	121
	803		INSTRUCTIONAL DARKROOM	100	100	0	0	132
	805		KILN	60	60	0	0	79
	806		REFERENCE	100	100	0	0	132
	808		MATERIAL STORAGE	100	2,700	0	0	3,564
	811		OUTSIDE STORAGE	50	1,350	0	0	1,782
	812		PROJECT STORAGE	150	450	0	0	594
	813		STUDENT STORAGE	40	80	0	0	105
	815		STUDENT RESTROOM (MALE)	35	945	0	0	1,247
	816		STUDENT RESTROOM (FEMALE)	35	945	0	0	1,247
	817		STUDENT RESTROOM & BATH	110	220	0	0	290
	830		MUSIC ENSEMBLE	300	300	0	0	396

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Spaces	Design	Grades	Description	NSF / Space	Total NSF	Cap. / Space	Total Stns.	Total GSF
	831		MUSIC PRACTICE ROOM	70	70	0	0	92
	832		INSTRUMENT STORAGE	600	600	0	0	792
	833		ROBE STORAGE	150	150	0	0	198
	834		UNIFORM STORAGE	300	300	0	0	396
	835		MUSIC STUDIO	180	180	0	0	237
	836		SHEET MUSIC STORAGE	150	150	0	0	198
	837		MUSIC EQUIPMENT STORAGE	400	400	0	0	528
	849		VOCATIONAL PROJECT STORAGE	310	310	0	0	409
	851		VOCATIONAL TOOL STORAGE (LARGE)	310	310	0	0	409
	808		MATERIAL STORAGE	100	100	0	0	132
	815		STUDENT RESTROOM (MALE)	35	35	0	0	46
	816		STUDENT RESTROOM (FEMALE)	35	35	0	0	46
	808		MATERIAL STORAGE	100	300	0	0	396
	808		MATERIAL STORAGE	100	300	0	0	396
	812		PROJECT STORAGE	150	450	0	0	594
	808		MATERIAL STORAGE	100	400	0	0	528
	808		MATERIAL STORAGE	100	100	0	0	132
	812		PROJECT STORAGE	150	150	0	0	198
	808		MATERIAL STORAGE	100	200	0	0	264
	815		STUDENT RESTROOM (MALE)	35	70	0	0	92
	816		STUDENT RESTROOM (FEMALE)	35	70	0	0	92
	808		MATERIAL STORAGE	100	200	0	0	264
	813		STUDENT STORAGE	40	80	0	0	105
	815		STUDENT RESTROOM (MALE)	35	70	0	0	92
	816		STUDENT RESTROOM (FEMALE)	35	70	0	0	92
	808		MATERIAL STORAGE	100	100	0	0	132
	815		STUDENT RESTROOM (MALE)	35	35	0	0	46
	816		STUDENT RESTROOM (FEMALE)	35	35	0	0	46
	808		MATERIAL STORAGE	100	100	0	0	132
	813		STUDENT STORAGE	40	40	0	0	52
	817		STUDENT RESTROOM & BATH	110	110	0	0	145
	808		MATERIAL STORAGE	100	300	0	0	396
	813		STUDENT STORAGE	40	120	0	0	158
	808		MATERIAL STORAGE	100	200	0	0	264

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Status:

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Spaces	Design	Grades	Description	NSF / Space	Total NSF	Cap. / Space	Total Stns.	Total GSF
	808		MATERIAL STORAGE	100	300	0	0	396
	808		MATERIAL STORAGE	100	100	0	0	132
	806		REFERENCE	100	100	0	0	132
	808		MATERIAL STORAGE	100	100	0	0	132
	830		MUSIC ENSEMBLE	300	300	0	0	396
	831		MUSIC PRACTICE ROOM	70	70	0	0	92
	836		SHEET MUSIC STORAGE	150	150	0	0	198
	837		MUSIC EQUIPMENT STORAGE	400	400	0	0	528
	808		MATERIAL STORAGE	100	100	0	0	132
	808		MATERIAL STORAGE	100	100	0	0	132
	852		VOCATIONAL TECHNOLOGY RESOURCE CENTER	800	800	0	0	1,056
27	815	06 - 12	STUDENT RESTROOM (MALE)	92	2,484	46	0	3,278
27	816	06 - 12	STUDENT RESTROOM (FEMALE)	92	2,484	46	0	3,278

EDUCATIONAL PLANT FIVE YEAR SURVEY REPORT

District:

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Survey:

Survey: 6 - Version: 1

Status:

Active Approved

Level:	SENIOR HIGH (09 - 12)	Gross Sq. Feet:	334,508
Target Number of Stations:	1,999	Utilization:	1.000
Total Stations:	1,999	Acres Required:	30
Total Capacity:	1,899		

Spaces	Design	Grades	Description	NSF / Space	Total NSF	Cap. / Space	Total Stns.	Total GSF
34	3	09 - 12	SENIOR HIGH CLASSROOM (9-12)	800	27,200	25	850	36,448
4	12	09 - 12	SENIOR HIGH SKILLS LAB (9-12)	800	3,200	25	100	4,288
4	22	09 - 12	SENIOR HIGH SCIENCE DEMO (9-12)	925	3,700	25	100	4,958
6	23	09 - 12	SENIOR HIGH SCIENCE LAB (9-12)	1,275	7,650	25	150	10,251
8	40	PK - 12	RESOURCE ROOM	290	2,320	10	0	3,108
2	52	09 - 12	ART - SENIOR HIGH	1,590	3,180	30	60	4,261
4	61	PK - 12	E S E PART-TIME	975	3,900	15	60	5,226
4	62	PK - 12	E S E FULL-TIME	950	3,800	10	40	5,092
2	63	PK - 12	E S E VOCATIONAL	1,140	2,280	12	24	3,055
6	65	PK - 12	E S E RESOURCE	380	2,280	4	0	3,055
4	66	PK - 12	E S E SUPPLEMENTARY INSTRUCTION	100	400	2	0	536
1	75	06 - 12	VOCAL MUSIC CLASS (MIDDLE-SR HIGH)	1,425	1,425	25	25	1,909
1	76	06 - 12	BAND CLASS (MIDDLE-SR HIGH)	2,000	2,000	50	50	2,680
1	81	06 - 12	RECORDING ROOM	225	225	5	0	301
1	82	06 - 12	INSTRUMENT REPAIR	0	0	0	0	0
1	90	06 - 12	P E DRESSING ROOM (MALE)	1,128	1,128	94	0	1,511
1	91	06 - 12	P E DRESSING ROOM (FEMALE)	1,128	1,128	94	0	1,511
2	92	06 - 12	P E LOCKER ROOM (MALE)	188	376	94	0	503
2	93	06 - 12	P E LOCKER ROOM (FEMALE)	188	376	94	0	503
2	94	06 - 12	P E SHOWER (MALE)	188	376	94	0	503
2	95	06 - 12	P E SHOWER (FEMALE)	188	376	94	0	503
1	96	06 - 12	P E DRYING AREA (MALE)	188	188	94	0	251
1	97	06 - 12	P E DRYING AREA (FEMALE)	188	188	94	0	251
1	98	06 - 12	P E STORAGE (MIDDLE-SR HIGH)	846	846	94	0	1,133
1	99	06 - 12	P E TEACHERS SHOWER (MALE)	22	22	1	0	29
1	100	06 - 12	P E TEACHERS SHOWER (FEMALE)	22	22	1	0	29
1	110	06 - 12	P E MULTIPURPOSE ROOM (MIDDLE-SR HIGH)	1,050	1,050	1	0	1,407
1	112	09 - 12	SR HIGH GYMNASIUM	6,500	6,500	70	70	8,710
1	113	06 - 12	GYMNASIUM SEATING	6,048	6,048	189	0	8,104

EDUCATIONAL PLANT FIVE YEAR SURVEY REPORT

District:

Survey:

Status:

8-CHARLOTTE COUNTY SCHOOL DISTRICT

Survey: 6 - Version: 1

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Spaces	Design	Grades	Description	NSF / Space	Total NSF	Cap. / Space	Total Stns.	Total GSF
1	114	06 - 12	P E LAUNDRY	188	188	94	0	251
1	115	06 - 12	P E FIRST AID	188	188	94	0	251
1	116	06 - 12	P E TRAINING ROOM	250	250	1	0	335
1	117	06 - 12	P E WEIGHT ROOM	1,000	1,000	1	0	1,340
1	118	06 - 12	P E WRESTLING ROOM	1,680	1,680	1	0	2,251
1	119	06 - 12	P E GYMNASTICS & DANCE	1,050	1,050	1	0	1,407
1	120	06 - 12	GYMNASIUM STORAGE	282	282	94	0	377
1	201	09 - 12	PRACTICAL AGRICULTURE LAB	1,250	1,250	25	25	1,675
1	203	09 - VE	MEDIUM AGRICULTURE LAB	1,600	1,600	20	20	2,144
2	204	09 - VE	LARGE AGRICULTURE LAB	2,560	5,120	20	40	6,860
3	211	09 - 12	PRACTICAL BUSINESS LAB	1,550	4,650	25	75	6,231
2	212	09 - VE	BUSINESS EDUCATION LAB	1,460	2,920	20	40	3,912
1	232	09 - VE	SMALL HOME ECONOMICS LAB	1,100	1,100	20	20	1,474
1	233	09 - VE	MEDIUM HOME ECONOMICS LAB	1,380	1,380	20	20	1,849
1	241	09 - 12	SMALL TECHNOLOGY LAB	1,625	1,625	25	25	2,177
1	242	09 - 12	MEDIUM TECHNOLOGY LAB	2,375	2,375	25	25	3,182
1	243	09 - 12	LARGE TECHNOLOGY LAB	3,375	3,375	25	25	4,522
1	245	09 - VE	MEDIUM INDUSTRIAL LAB	1,800	1,800	20	20	2,412
1	246	09 - VE	LARGE INDUSTRIAL LAB	4,000	4,000	20	20	5,360
1	251	09 - 12	PRACTICAL HEALTH LAB	1,400	1,400	25	25	1,876
1	253	09 - VE	MEDIUM HEALTH LAB	2,200	2,200	20	20	2,948
1	263	09 - VE	MEDIUM PUBLIC SERVICE LAB	1,300	1,300	20	20	1,742
1	270	09 - VE	WORK EVALUATION LAB	1,110	1,110	15	0	1,487
1	271	09 - VE	VPI LAB	705	705	15	0	944
1	300	PK - VE	PRINCIPAL/DIRECTOR OFFICE	250	250	0	0	335
13	301	PK - VE	ASSISTANT PRINCIPAL/OTHER OFFICE	175	2,275	0	0	3,048
1	302	PK - VE	BOOKKEEPING OFFICE	125	125	0	0	167
2	303	PK - VE	SECRETARIAL SPACE	158	316	0	0	423
1	304	PK - VE	RECEPTION AREA	1,598	1,598	94	0	2,141
2	305	PK - VE	PRODUCTION WORKROOM	752	1,504	94	0	2,015
1	306	PK - VE	CONFERENCE ROOM	1,316	1,316	94	0	1,763
1	307	PK - VE	CLINIC	564	564	94	0	755
1	308	PK - VE	GENERAL SCHOOL STORAGE	940	940	94	0	1,259
1	309	PK - VE	VAULT/STUDENT RECORDS	564	564	94	0	755

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District:

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Survey: 6 - Version: 1

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Spaces	Design	Grades	Description	NSF / Space	Total NSF	Cap. / Space	Total Stns.	Total GSF
1	310	PK - VE	SCHOOL STORE	188	188	94	0	251
1	311	PK - VE	STUDENT ACTIVITIES	940	940	94	0	1,259
1	312	PK - VE	COMPUTER AREA	282	282	94	0	377
1	313	PK - VE	CAREERS ROOM	564	564	94	0	755
5	314	PK - VE	ITINERANT OFFICE	125	625	0	0	837
1	315	PK - VE	TEACHER PLANNING OFFICE	3,780	3,780	189	0	5,065
1	316	PK - VE	TEACHER LOUNGE/DINING	756	756	189	0	1,013
1	330	PK - VE	CUSTODIAL RECEIVING	2,835	2,835	189	0	3,798
1	333	PK - VE	FLAMMABLE STORAGE	155	155	0	0	207
1	334	PK - VE	CUSTODIAL EQUIPMENT STORAGE	500	500	0	0	670
1	340	PK - VE	DINING AREA	7,560	7,560	189	0	10,130
1	341	PK - VE	KITCHEN & SERVING AREA	8,316	8,316	189	0	11,143
1	349	PK - VE	KITCHEN CHAIR STORAGE	376	376	94	0	503
1	351	06 - 12	MIDDLE/SR HIGH COVERED PATIO	6,804	6,804	189	0	9,117
1	360	06 - VE	AUDITORIUM	5,670	5,670	189	0	7,597
1	363	PK - VE	STAGE	990	990	1	0	1,326
1	364	PK - VE	STAGE STORAGE	945	945	189	0	1,266
1	365	PK - VE	STAGE DRESSING ROOM (MALE)	470	470	94	0	629
1	366	PK - VE	STAGE DRESSING ROOM (FEMALE)	470	470	94	0	629
1	367	PK - VE	CONTROL BOOTH/PROJECTION ROOM	100	100	1	0	134
1	368	PK - VE	TEXTBOOK STORAGE	658	658	94	0	881
1	369	06 - VE	STUDENT PERSONAL STORAGE	945	945	189	0	1,266
2	370	06 - VE	LOBBY	940	1,880	94	0	2,519
3	371	06 - VE	CONCESSIONS	200	600	1	0	804
2	372	06 - VE	TICKET BOOTH	30	60	1	0	80
1	380	PK - VE	LIBRARY (READING ROOM/STACKS)	6,993	6,993	189	0	9,370
1	381	PK - VE	MEDIA TECHNICAL PROCESSING	756	756	189	0	1,013
1	382	PK - VE	PROFESSIONAL LIBRARY	756	756	189	0	1,013
1	383	PK - VE	AUDIO VISUAL STORAGE	1,134	1,134	189	0	1,519
1	384	PK - VE	PERIODICAL STORAGE	378	378	189	0	506
1	385	PK - VE	CLOSED CIRCUIT TV LAB	1,323	1,323	189	0	1,772
1	386	PK - VE	CLOSED CIRCUIT STORAGE	945	945	189	0	1,266
1	387	PK - VE	MEDIA PRODUCTION LAB	945	945	189	0	1,266
1	388	PK - VE	MEDIA COPYING ROOM	378	378	189	0	506

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Spaces	Design	Grades	Description	NSF / Space	Total NSF	Cap. / Space	Total Stns.	Total GSF
1	389	PK - VE	MEDIA SMALL GROUP ROOM	188	188	94	0	251
1	390	PK - VE	MEDIA GROUP PROJECTS/INSTRUCTION	945	945	189	0	1,266
1	391	PK - VE	MEDIA MAINTENANCE/REPAIR	188	188	94	0	251
2	708	09 - 12	JROTC	1,050	2,100	25	50	2,814
	800		ARMS ROOM	150	300	0	0	402
	801		FIRING RANGE (INDOOR)	2,400	4,800	0	0	6,432
	802		INSTRUCTIONAL CONFERENCE ROOM	225	450	0	0	603
	802		INSTRUCTIONAL CONFERENCE ROOM	225	225	0	0	301
	803		INSTRUCTIONAL DARKROOM	100	200	0	0	268
	804		DISPENSARY	135	135	0	0	180
	805		KILN	60	120	0	0	160
	806		REFERENCE	100	100	0	0	134
	806		REFERENCE	100	100	0	0	134
	806		REFERENCE	100	200	0	0	268
	806		REFERENCE	100	100	0	0	134
	806		REFERENCE	100	100	0	0	134
	806		REFERENCE	100	100	0	0	134
	806		REFERENCE	100	100	0	0	134
	808		MATERIAL STORAGE	100	100	0	0	134
	808		MATERIAL STORAGE	100	200	0	0	268
	808		MATERIAL STORAGE	100	100	0	0	134
	808		MATERIAL STORAGE	100	100	0	0	134
	808		MATERIAL STORAGE	100	100	0	0	134
	808		MATERIAL STORAGE	100	100	0	0	134
	808		MATERIAL STORAGE	100	100	0	0	134
	808		MATERIAL STORAGE	100	100	0	0	134
	808		MATERIAL STORAGE	100	100	0	0	134
	808		MATERIAL STORAGE	100	200	0	0	268
	808		MATERIAL STORAGE	100	300	0	0	402
	808		MATERIAL STORAGE	100	100	0	0	134
	808		MATERIAL STORAGE	100	400	0	0	536
	808		MATERIAL STORAGE	100	100	0	0	134
	808		MATERIAL STORAGE	100	200	0	0	268
	808		MATERIAL STORAGE	100	400	0	0	536
	808		MATERIAL STORAGE	100	600	0	0	804

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Spaces	Design	Grades	Description	NSF / Space	Total NSF	Cap. / Space	Total Stns.	Total GSF
	808		MATERIAL STORAGE	100	400	0	0	536
	808		MATERIAL STORAGE	100	400	0	0	536
	808		MATERIAL STORAGE	100	3,400	0	0	4,556
	808		MATERIAL STORAGE	100	600	0	0	804
	808		MATERIAL STORAGE	100	800	0	0	1,072
	808		MATERIAL STORAGE	100	200	0	0	268
	808		MATERIAL STORAGE	100	400	0	0	536
	810		MATERIAL STORAGE (LARGE)	395	395	0	0	529
	810		MATERIAL STORAGE (LARGE)	395	790	0	0	1,058
	810		MATERIAL STORAGE (LARGE)	395	395	0	0	529
	810		MATERIAL STORAGE (LARGE)	395	395	0	0	529
	810		MATERIAL STORAGE (LARGE)	395	395	0	0	529
	810		MATERIAL STORAGE (LARGE)	395	395	0	0	529
	810		MATERIAL STORAGE (LARGE)	395	395	0	0	529
	810		MATERIAL STORAGE (LARGE)	395	395	0	0	529
	810		MATERIAL STORAGE (LARGE)	395	395	0	0	529
	810		MATERIAL STORAGE (LARGE)	395	395	0	0	529
	810		MATERIAL STORAGE (LARGE)	395	395	0	0	529
	812		PROJECT STORAGE	150	150	0	0	201
	812		PROJECT STORAGE	150	150	0	0	201
	812		PROJECT STORAGE	150	600	0	0	804
	812		PROJECT STORAGE	150	900	0	0	1,206
	812		PROJECT STORAGE	150	300	0	0	402
	813		STUDENT STORAGE	40	160	0	0	214
	813		STUDENT STORAGE	40	160	0	0	214
	813		STUDENT STORAGE	40	240	0	0	321
	815		STUDENT RESTROOM (MALE)	35	140	0	0	187
	815		STUDENT RESTROOM (MALE)	35	70	0	0	93
	815		STUDENT RESTROOM (MALE)	35	140	0	0	187
4	815	06 - 12	STUDENT RESTROOM (MALE)	188	752	94	0	1,007
4	816	06 - 12	STUDENT RESTROOM (FEMALE)	188	752	94	0	1,007
	816		STUDENT RESTROOM (FEMALE)	35	140	0	0	187
	816		STUDENT RESTROOM (FEMALE)	35	70	0	0	93
	816		STUDENT RESTROOM (FEMALE)	35	140	0	0	187
	817		STUDENT RESTROOM & BATH	110	440	0	0	589

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District:

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Spaces	Design	Grades	Description	NSF / Space	Total NSF	Cap. / Space	Total Stns.	Total GSF
	818		LOCKERS/RESTROOM/SHOWER (ESE/VOC ED)	225	450	0	0	603
	818		LOCKERS/RESTROOM/SHOWER (ESE/VOC ED)	225	225	0	0	301
	830		MUSIC ENSEMBLE	300	300	0	0	402
	830		MUSIC ENSEMBLE	300	300	0	0	402
	831		MUSIC PRACTICE ROOM	70	70	0	0	93
	831		MUSIC PRACTICE ROOM	70	70	0	0	93
	832		INSTRUMENT STORAGE	600	600	0	0	804
	833		ROBE STORAGE	150	150	0	0	201
	834		UNIFORM STORAGE	300	300	0	0	402
	835		MUSIC STUDIO	180	180	0	0	241
	836		SHEET MUSIC STORAGE	150	150	0	0	201
	836		SHEET MUSIC STORAGE	150	150	0	0	201
	837		MUSIC EQUIPMENT STORAGE	400	400	0	0	536
	837		MUSIC EQUIPMENT STORAGE	400	400	0	0	536
	840		VOCATIONAL RELATED CLASSROOM	680	680	20	0	911
	840		VOCATIONAL RELATED CLASSROOM	680	1,360	20	0	1,822
	840		VOCATIONAL RELATED CLASSROOM	680	680	20	0	911
	840		VOCATIONAL RELATED CLASSROOM	680	680	20	0	911
	840		VOCATIONAL RELATED CLASSROOM	680	680	20	0	911
	840		VOCATIONAL RELATED CLASSROOM	680	680	20	0	911
	840		VOCATIONAL RELATED CLASSROOM	680	680	20	0	911
	840		VOCATIONAL RELATED CLASSROOM	680	680	20	0	911
	840		VOCATIONAL RELATED CLASSROOM	680	680	20	0	911
	840		VOCATIONAL RELATED CLASSROOM	680	680	20	0	911
	841		GREENHOUSE	800	800	0	0	1,072
	841		GREENHOUSE	800	1,600	0	0	2,144
	841		GREENHOUSE	800	800	0	0	1,072
	842		KITCHEN (HOME ECONOMICS)	125	125	0	0	167
	843		LAUNDRY (HOME ECONOMICS)	50	50	0	0	67
	846		RECEPTION (VOC ED INSTRUCTION)	90	90	0	0	120
	847		VOCATIONAL FLAMMABLE STORAGE	125	125	0	0	167
	847		VOCATIONAL FLAMMABLE STORAGE	125	125	0	0	167
	847		VOCATIONAL FLAMMABLE STORAGE	125	125	0	0	167
	847		VOCATIONAL FLAMMABLE STORAGE	125	250	0	0	335
	848		VOCATIONAL MACHINERY STORAGE	1,100	2,200	0	0	2,948
	848		VOCATIONAL MACHINERY STORAGE	1,100	1,100	0	0	1,474

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District:
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Survey:
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Status:
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Spaces	Design	Grades	Description	NSF / Space	Total NSF	Cap. / Space	Total Stns.	Total GSF
	848		VOCATIONAL MACHINERY STORAGE	1,100	1,100	0	0	1,474
	849		VOCATIONAL PROJECT STORAGE	310	310	0	0	415
	849		VOCATIONAL PROJECT STORAGE	310	310	0	0	415
	849		VOCATIONAL PROJECT STORAGE	310	310	0	0	415
	849		VOCATIONAL PROJECT STORAGE	310	310	0	0	415
	850		VOCATIONAL TOOL STORAGE (SMALL)	195	195	0	0	261
	850		VOCATIONAL TOOL STORAGE (SMALL)	195	195	0	0	261
	850		VOCATIONAL TOOL STORAGE (SMALL)	195	195	0	0	261
	851		VOCATIONAL TOOL STORAGE (LARGE)	310	310	0	0	415
	851		VOCATIONAL TOOL STORAGE (LARGE)	310	620	0	0	830
	851		VOCATIONAL TOOL STORAGE (LARGE)	310	310	0	0	415
	852		VOCATIONAL TECHNOLOGY RESOURCE CENTER	800	800	0	0	1,072
	852		VOCATIONAL TECHNOLOGY RESOURCE CENTER	800	800	0	0	1,072
	852		VOCATIONAL TECHNOLOGY RESOURCE CENTER	800	800	0	0	1,072
	852		VOCATIONAL TECHNOLOGY RESOURCE CENTER	800	800	0	0	1,072
	852		VOCATIONAL TECHNOLOGY RESOURCE CENTER	800	800	0	0	1,072
	853		VOCATIONAL TESTING	250	250	0	0	335
	853		VOCATIONAL TESTING	250	250	0	0	335

EDUCATIONAL PLANT FIVE YEAR SURVEY REPORT

District:

8-CHARLOTTE COUNTY SCHOOL DISTRICT

Survey:

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Status:

Active Approved

Level:	COUNTY ADMINISTRATION (CA - CA)	Gross Sq. Feet:	50,931
Target Number of Stations:	0	Utilization:	0.000
Total Stations:	0	Acres Required:	7
Total Capacity:	0		

Spaces	Design	Grades	Description	NSF / Space	Total NSF	Cap. / Space	Total Stns.	Total GSF
1	400	CA - DS	SUPERINTENDENTS OFFICE	0	0	0	0	0
6	401	CA - DS	ANCILLARY CONFERENCE ROOM	0	0	0	0	0
1	402	CA - DS	SUPERINTENDENTS SECRETARY	0	0	0	0	0
6	403	CA - DS	ANCILLARY SECRETARIAL/CLERICAL OFFICE	0	0	0	0	0
6	404	CA - DS	ANCILLARY RECEPTION AREA	0	0	0	0	0
2	405	CA - DS	VAULT	0	0	0	0	0
4	406	CA - DS	ASSISTANT SUPERINTENDENTS OFFICE	0	0	0	0	0
20	407	CA - DS	ANCILLARY ADMINISTRATIVE OFFICE	0	0	0	0	0
1	408	CA - DS	BUSINESS OPERATIONS WORK AREA	0	0	0	0	0
2	409	CA - DS	BUSINESS OPERATIONS STORAGE	0	0	0	0	0
1	410	CA - DS	SCHOOL PLANT PLANNING	0	0	0	0	0
1	411	CA - DS	WORD PROCESSING CENTER	0	0	0	0	0
1	412	CA - DS	PERSONNEL SERVICES	0	0	0	0	0
1	413	CA - DS	CENTRAL REPRODUCTION & COPY	0	0	0	0	0
1	414	CA - DS	CENTRAL ADMINISTRATIVE SUPPLY	0	0	0	0	0
1	415	CA - DS	MAIL ROOM	0	0	0	0	0
1	416	CA - DS	ANCILLARY CUSTODIAL SERVICES	0	0	0	0	0
1	417	CA - DS	CENTRAL SECURITY OFFICE	0	0	0	0	0
6	418	CA - DS	ANCILLARY ADMINISTRATIVE STORAGE	0	0	0	0	0
2	419	CA - DS	ANCILLARY FLAMMABLE STORAGE	0	0	0	0	0
1	420	CA - DS	SCHOOL BOARD MEETING ROOM	0	0	0	0	0
2	421	CA - DS	ANCILLARY STAFF LOUNGE	0	0	0	0	0
1	422	CA - DS	MAIN LOBBY & SWITCHBOARD	0	0	0	0	0
8	424	CA - DS	DIRECTORS OFFICE	0	0	0	0	0
8	425	CA - DS	ASSISTANT DIRECTORS OFFICE	0	0	0	0	0
12	426	CA - DS	GENERAL ANCILLARY OFFICE	0	0	0	0	0
2	427	CA - DS	STAFF DEVELOPMENT/INSTRUCTION	0	0	0	0	0
10	428	CA - DS	OTHER ANCILLARY ADMINISTRATIVE SUPPORT	0	0	0	0	0
1	500	CA - DS	PROGRAMMER ROOM	0	0	0	0	0

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Spaces	Design	Grades	Description	NSF / Space	Total NSF	Cap. / Space	Total Stns.	Total GSF
1	501	CA - DS	DATA PROCESSING TECHNICAL AREA	0	0	0	0	0
1	502	CA - DS	DATA PROCESSING EQUIPMENT	0	0	0	0	0
1	503	CA - DS	COMPUTER ROOM (RAISED FLOOR)	0	0	0	0	0
1	504	CA - DS	OFF-LINE EQUIPMENT	0	0	0	0	0
2	505	CA - DS	ANCILLARY COMPUTER STORAGE	0	0	0	0	0
4	506	CA - DS	OTHER CENTRAL EQUIPMENT SUPPORT	0	0	0	0	0
4	824	CA - DS	ANCILLARY RESTROOM (MALE)	0	0	0	0	0
4	825	CA - DS	ANCILLARY RESTROOM (FEMALE)	0	0	0	0	0

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District:

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Survey:

Survey: 6 - Version: 1

Status:

Active Approved

Level: TRANSPORTATION (DS - DS)

Gross Sq. Feet: 22,283

Target Number of Stations: 0

Utilization: 0.000

Total Stations: 0

Acres Required: 7

Total Capacity: 0

Spaces	Design	Grades	Description	NSF / Space	Total NSF	Cap. / Space	Total Stns.	Total GSF
7	426	CA - DS	GENERAL ANCILLARY OFFICE	0	0	0	0	0
3	585	CA - DS	SCHOOL BUS PARTS ROOM	0	0	0	0	0
2	586	CA - DS	SCHOOL BUS MACHINE SHOP	0	0	0	0	0
1	587	CA - DS	SCHOOL BUS GLASS/UPHOLSTERY SHOP	0	0	0	0	0
2	588	CA - DS	SCHOOL BUS BODY SHOP	0	0	0	0	0
3	589	CA - DS	SCHOOL BUS PAINT/FLAMMABLE STORAGE	0	0	0	0	0
1	590	CA - DS	SCHOOL BUS PAINT BAY	0	0	0	0	0
3	591	CA - DS	SCHOOL BUS TIRE STORAGE & MOUNTING	0	0	0	0	0
8	592	CA - DS	SCHOOL BUS WORK BAY	0	0	0	0	0
1	593	CA - DS	SCHOOL BUS DRIVERS CLASSROOM	0	0	0	0	0
4	594	CA - DS	ANCILLARY SUPPORT STORAGE	0	0	0	0	0
4	824	CA - DS	ANCILLARY RESTROOM (MALE)	0	0	0	0	0
4	825	CA - DS	ANCILLARY RESTROOM (FEMALE)	0	0	0	0	0

EDUCATIONAL PLANT FIVE YEAR SURVEY REPORT

District:

8-CHARLOTTE COUNTY SCHOOL DISTRICT

Survey:

Survey: 6 - Version: 1

Status:

Active Approved

Level:	MULTIPLE USE SUPPORT (DS - DS)	Gross Sq. Feet:	63,665
Target Number of Stations:	0	Utilization:	0.000
Total Stations:	0	Acres Required:	7
Total Capacity:	0		

Spaces	Design	Grades	Description	NSF / Space	Total NSF	Cap. / Space	Total Stns.	Total GSF
1	413	CA - DS	CENTRAL REPRODUCTION & COPY	0	0	0	0	0
1	510	CA - DS	WAREHOUSE STORAGE	0	0	0	0	0
1	520	CA - DS	CARPENTRY SHOP	0	0	0	0	0
1	525	CA - DS	GLAZING SHOP	0	0	0	0	0
1	530	CA - DS	MASONRY SHOP	0	0	0	0	0
1	535	CA - DS	SMALL ENGINE SHOP	0	0	0	0	0
1	540	CA - DS	ELECTRONICS SHOP	0	0	0	0	0
1	545	CA - DS	ELECTRICAL SHOP	0	0	0	0	0
1	550	CA - DS	MACHINE SHOP	0	0	0	0	0
1	555	CA - DS	PLUMBING SHOP	0	0	0	0	0
1	560	CA - DS	PAINT SHOP	0	0	0	0	0
1	565	CA - DS	WELDING SHOP	0	0	0	0	0
1	570	CA - DS	AIR CONDITIONING SHOP	0	0	0	0	0
1	575	CA - DS	CARPET SHOP	0	0	0	0	0
1	580	CA - DS	LOCKSMITH SHOP	0	0	0	0	0
1	585	CA - DS	SCHOOL BUS PARTS ROOM	0	0	0	0	0
1	586	CA - DS	SCHOOL BUS MACHINE SHOP	0	0	0	0	0
1	587	CA - DS	SCHOOL BUS GLASS/UPHOLSTERY SHOP	0	0	0	0	0
1	588	CA - DS	SCHOOL BUS BODY SHOP	0	0	0	0	0
1	589	CA - DS	SCHOOL BUS PAINT/FLAMMABLE STORAGE	0	0	0	0	0
1	590	CA - DS	SCHOOL BUS PAINT BAY	0	0	0	0	0
1	591	CA - DS	SCHOOL BUS TIRE STORAGE & MOUNTING	0	0	0	0	0
1	592	CA - DS	SCHOOL BUS WORK BAY	0	0	0	0	0
1	593	CA - DS	SCHOOL BUS DRIVERS CLASSROOM	0	0	0	0	0
1	594	CA - DS	ANCILLARY SUPPORT STORAGE	0	0	0	0	0
2	824	CA - DS	ANCILLARY RESTROOM (MALE)	0	0	0	0	0
2	825	CA - DS	ANCILLARY RESTROOM (FEMALE)	0	0	0	0	0

EDUCATIONAL PLANT FIVE YEAR SURVEY REPORT

District:

8-CHARLOTTE COUNTY SCHOOL DISTRICT

Survey:

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Status:

Active Approved

Level:	PRE-K E S E (PK - PK)	Gross Sq. Feet:	41,605
Target Number of Stations:	115	Utilization:	1.000
Total Stations:	115	Acres Required:	4
Total Capacity:	115		

Spaces	Design	Grades	Description	NSF / Space	Total NSF	Cap. / Space	Total Stns.	Total GSF
1	10	PK - 03	PRIMARY SKILLS LAB (K-3)	882	882	18	0	1,181
1	14	PK - 05	ELEMENTARY COVERED PLAY AREA	396	396	11	0	530
1	40	PK - 12	RESOURCE ROOM	290	290	10	0	388
1	50	PK - 05	ART - ELEMENTARY	1,000	1,000	22	0	1,340
1	55	PK - 05	MUSIC - ELEMENTARY	1,000	1,000	22	0	1,340
18	60	PK - PK	E S E PRE-K	475	8,550	5	90	11,457
1	61	PK - 12	E S E PART-TIME	975	975	15	15	1,306
1	62	PK - 12	E S E FULL-TIME	950	950	10	10	1,273
1	64	PK - 12	E S E PT/OT LAB	475	475	5	0	636
1	65	PK - 12	E S E RESOURCE	380	380	4	0	509
1	66	PK - 12	E S E SUPPLEMENTARY INSTRUCTION	50	50	2	0	67
1	69	PK - 12	E S E AUDIOLOGY LAB	250	250	0	0	335
3	70	PK - 12	E S E ITINERANT	200	600	4	0	804
1	300	PK - VE	PRINCIPAL/DIRECTOR OFFICE	250	250	0	0	335
25	301	PK - VE	ASSISTANT PRINCIPAL/OTHER OFFICE	175	4,375	0	0	5,862
1	304	PK - VE	RECEPTION AREA	85	85	5	0	113
1	305	PK - VE	PRODUCTION WORKROOM	40	40	5	0	53
4	306	PK - VE	CONFERENCE ROOM	70	280	5	0	375
1	307	PK - VE	CLINIC	30	30	5	0	40
1	308	PK - VE	GENERAL SCHOOL STORAGE	50	50	5	0	67
1	309	PK - VE	VAULT/STUDENT RECORDS	30	30	5	0	40
1	311	PK - VE	STUDENT ACTIVITIES	50	50	5	0	67
1	312	PK - VE	COMPUTER AREA	15	15	5	0	20
1	314	PK - VE	ITINERANT OFFICE	125	125	0	0	167
3	315	PK - VE	TEACHER PLANNING OFFICE	220	660	11	0	884
1	316	PK - VE	TEACHER LOUNGE/DINING	44	44	11	0	58
1	330	PK - VE	CUSTODIAL RECEIVING	165	165	11	0	221
1	341	PK - VE	KITCHEN & SERVING AREA	484	484	11	0	648
2	349	PK - VE	KITCHEN CHAIR STORAGE	20	40	5	0	53

EDUCATIONAL PLANT FIVE YEAR SURVEY REPORT

District:

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Spaces	Design	Grades	Description	NSF / Space	Total NSF	Cap. / Space	Total Stns.	Total GSF
1	361	PK - VE	MULTIPURPOSE ROOM (DINING)	341	341	11	0	456
1	363	PK - VE	STAGE	990	990	1	0	1,326
1	380	PK - VE	LIBRARY (READING ROOM/STACKS)	407	407	11	0	545
1	382	PK - VE	PROFESSIONAL LIBRARY	44	44	11	0	58
1	384	PK - VE	PERIODICAL STORAGE	22	22	11	0	29
	806		REFERENCE	100	100	0	0	134
	808		MATERIAL STORAGE	100	100	0	0	134
	808		MATERIAL STORAGE	100	100	0	0	134
	808		MATERIAL STORAGE	100	100	0	0	134
	808		MATERIAL STORAGE	100	100	0	0	134
	808		MATERIAL STORAGE	100	100	0	0	134
	808		MATERIAL STORAGE	100	1,800	0	0	2,412
	808		MATERIAL STORAGE	100	300	0	0	402
	808		MATERIAL STORAGE	100	100	0	0	134
	808		MATERIAL STORAGE	100	100	0	0	134
	808		MATERIAL STORAGE	100	100	0	0	134
	808		MATERIAL STORAGE	100	100	0	0	134
	808		MATERIAL STORAGE	100	100	0	0	134
	808		MATERIAL STORAGE	100	100	0	0	134
	812		PROJECT STORAGE	150	150	0	0	201
	813		STUDENT STORAGE	40	40	0	0	53
	813		STUDENT STORAGE	40	40	0	0	53
	813		STUDENT STORAGE	40	40	0	0	53
	813		STUDENT STORAGE	40	720	0	0	964
	813		STUDENT STORAGE	40	40	0	0	53
	813		STUDENT STORAGE	40	40	0	0	53
	814		STUDENT RESTROOM (BOTH SEXES)	60	60	0	0	80
	815		STUDENT RESTROOM (MALE)	35	35	0	0	46
	815		STUDENT RESTROOM (MALE)	35	35	0	0	46
	816		STUDENT RESTROOM (FEMALE)	35	35	0	0	46
	816		STUDENT RESTROOM (FEMALE)	35	35	0	0	46
	817		STUDENT RESTROOM & BATH	110	110	0	0	147
	817		STUDENT RESTROOM & BATH	110	1,980	0	0	2,653
	817		STUDENT RESTROOM & BATH	110	110	0	0	147
	831		MUSIC PRACTICE ROOM	70	70	0	0	93

EDUCATIONAL PLANT FIVE YEAR SURVEY REPORT

District:

8-CHARLOTTE COUNTY SCHOOL DISTRICT

Survey:

Survey: 6 - Version: 1

Status:

Active Approved

EDUCATIONAL PLANT FIVE YEAR SURVEY REPORT

District:

8-CHARLOTTE COUNTY SCHOOL DISTRICT

Survey:

Survey: 6 - Version: 1

Status:

Active Approved

Level:	ALTERNATIVE EDUCATION (06 - 12)	Gross Sq. Feet:	28,323
Target Number of Stations:	191	Utilization:	1.000
Total Stations:	191	Acres Required:	7
Total Capacity:	191		

Spaces	Design	Grades	Description	NSF / Space	Total NSF	Cap. / Space	Total Stns.	Total GSF
2	11	04 - 08	INTERMEDIATE/MIDDLE SKILLS LAB (4-8)	858	1,716	22	44	2,299
3	12	09 - 12	SENIOR HIGH SKILLS LAB (9-12)	800	2,400	25	75	3,216
1	20	04 - 08	INTERMEDIATE/MIDDLE SCIENCE DEMO (4-8)	814	814	22	22	1,090
1	23	09 - 12	SENIOR HIGH SCIENCE LAB (9-12)	1,275	1,275	25	25	1,708
1	40	PK - 12	RESOURCE ROOM	290	290	10	0	388
1	61	PK - 12	E S E PART-TIME	975	975	15	15	1,306
1	62	PK - 12	E S E FULL-TIME	950	950	10	10	1,273
1	65	PK - 12	E S E RESOURCE	380	380	4	0	509
1	66	PK - 12	E S E SUPPLEMENTARY INSTRUCTION	50	50	2	0	67
1	70	PK - 12	E S E ITINERANT	200	200	4	0	268
1	98	06 - 12	P E STORAGE (MIDDLE-SR HIGH)	81	81	9	0	108
1	110	06 - 12	P E MULTIPURPOSE ROOM (MIDDLE-SR HIGH)	1,050	1,050	1	0	1,407
1	270	09 - VE	WORK EVALUATION LAB	1,110	1,110	15	0	1,487
1	271	09 - VE	VPI LAB	705	705	15	0	944
1	300	PK - VE	PRINCIPAL/DIRECTOR OFFICE	250	250	0	0	335
3	301	PK - VE	ASSISTANT PRINCIPAL/OTHER OFFICE	175	525	0	0	703
1	302	PK - VE	BOOKKEEPING OFFICE	125	125	0	0	167
1	303	PK - VE	SECRETARIAL SPACE	158	158	0	0	211
1	304	PK - VE	RECEPTION AREA	153	153	9	0	205
1	305	PK - VE	PRODUCTION WORKROOM	72	72	9	0	96
1	306	PK - VE	CONFERENCE ROOM	126	126	9	0	168
1	307	PK - VE	CLINIC	54	54	9	0	72
1	308	PK - VE	GENERAL SCHOOL STORAGE	90	90	9	0	120
1	309	PK - VE	VAULT/STUDENT RECORDS	54	54	9	0	72
1	314	PK - VE	ITINERANT OFFICE	125	125	0	0	167
1	315	PK - VE	TEACHER PLANNING OFFICE	380	380	19	0	509
1	330	PK - VE	CUSTODIAL RECEIVING	285	285	19	0	381
1	334	PK - VE	CUSTODIAL EQUIPMENT STORAGE	500	500	0	0	670
1	361	PK - VE	MULTIPURPOSE ROOM (DINING)	589	589	19	0	789

EDUCATIONAL PLANT FIVE YEAR SURVEY REPORT

District:

Survey:

Status:

8-CHARLOTTE COUNTY SCHOOL DISTRICT

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Spaces	Design	Grades	Description	NSF / Space	Total NSF	Cap. / Space	Total Stns.	Total GSF
1	368	PK - VE	TEXTBOOK STORAGE	63	63	9	0	84
1	369	06 - VE	STUDENT PERSONAL STORAGE	95	95	19	0	127
1	371	06 - VE	CONCESSIONS	200	200	1	0	268
1	380	PK - VE	LIBRARY (READING ROOM/STACKS)	703	703	19	0	942
1	381	PK - VE	MEDIA TECHNICAL PROCESSING	76	76	19	0	101
1	382	PK - VE	PROFESSIONAL LIBRARY	76	76	19	0	101
1	383	PK - VE	AUDIO VISUAL STORAGE	114	114	19	0	152
1	384	PK - VE	PERIODICAL STORAGE	38	38	19	0	50
1	387	PK - VE	MEDIA PRODUCTION LAB	95	95	19	0	127
1	390	PK - VE	MEDIA GROUP PROJECTS/INSTRUCTION	95	95	19	0	127
1	391	PK - VE	MEDIA MAINTENANCE/REPAIR	18	18	9	0	24
	802		INSTRUCTIONAL CONFERENCE ROOM	225	225	0	0	301
	808		MATERIAL STORAGE	100	100	0	0	134
	808		MATERIAL STORAGE	100	100	0	0	134
	808		MATERIAL STORAGE	100	100	0	0	134
	808		MATERIAL STORAGE	100	100	0	0	134
	808		MATERIAL STORAGE	100	100	0	0	134
	808		MATERIAL STORAGE	100	100	0	0	134
	808		MATERIAL STORAGE	100	100	0	0	134
	808		MATERIAL STORAGE	100	300	0	0	402
	808		MATERIAL STORAGE	100	200	0	0	268
	808		MATERIAL STORAGE	100	100	0	0	134
	810		MATERIAL STORAGE (LARGE)	395	395	0	0	529
	812		PROJECT STORAGE	150	150	0	0	201
	812		PROJECT STORAGE	150	150	0	0	201
	813		STUDENT STORAGE	40	40	0	0	53
	813		STUDENT STORAGE	40	40	0	0	53
	813		STUDENT STORAGE	40	40	0	0	53
	815		STUDENT RESTROOM (MALE)	35	35	0	0	46
	815		STUDENT RESTROOM (MALE)	35	35	0	0	46
	815		STUDENT RESTROOM (MALE)	35	70	0	0	93
	816		STUDENT RESTROOM (FEMALE)	35	70	0	0	93
	816		STUDENT RESTROOM (FEMALE)	35	35	0	0	46

EDUCATIONAL PLANT FIVE YEAR SURVEY REPORT

District:

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Survey:

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Status:

Active Approved

Spaces	Design	Grades	Description	NSF / Space	Total NSF	Cap. / Space	Total Stns.	Total GSF
	816		STUDENT RESTROOM (FEMALE)	35	35	0	0	46
	817		STUDENT RESTROOM & BATH	110	110	0	0	147
	840		VOCATIONAL RELATED CLASSROOM	680	680	20	0	911
	846		RECEPTION (VOC ED INSTRUCTION)	90	90	0	0	120
	853		VOCATIONAL TESTING	250	250	0	0	335
	853		VOCATIONAL TESTING	250	250	0	0	335

EDUCATIONAL PLANT FIVE YEAR SURVEY REPORT

District:
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Survey:
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Status:
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Level:	EXCEPTIONAL STUDENT (KG - 12)	Gross Sq. Feet:	67,272
Target Number of Stations:	333	Utilization:	1.000
Total Stations:	333	Acres Required:	8
Total Capacity:	333		

Spaces	Design	Grades	Description	NSF / Space	Total NSF	Cap. / Space	Total Stns.	Total GSF
7	61	PK - 12	E S E PART-TIME	975	6,825	15	105	9,145
18	62	PK - 12	E S E FULL-TIME	950	17,100	10	180	22,914
4	63	PK - 12	E S E VOCATIONAL	1,140	4,560	12	48	6,110
1	64	PK - 12	E S E PT/OT LAB	475	475	5	0	636
3	65	PK - 12	E S E RESOURCE	380	1,140	4	0	1,527
4	66	PK - 12	E S E SUPPLEMENTARY INSTRUCTION	50	200	2	0	268
2	67	PK - 12	E S E OBSERVATION BOOTH	150	300	0	0	402
2	68	PK - 12	E S E TIME-OUT ROOM	40	80	0	0	107
1	69	PK - 12	E S E AUDIOLOGY LAB	250	250	0	0	335
1	300	PK - VE	PRINCIPAL/DIRECTOR OFFICE	250	250	0	0	335
5	301	PK - VE	ASSISTANT PRINCIPAL/OTHER OFFICE	175	875	0	0	1,172
1	302	PK - VE	BOOKKEEPING OFFICE	125	125	0	0	167
2	303	PK - VE	SECRETARIAL SPACE	158	316	0	0	423
1	304	PK - VE	RECEPTION AREA	272	272	16	0	364
1	305	PK - VE	PRODUCTION WORKROOM	128	128	16	0	171
1	306	PK - VE	CONFERENCE ROOM	224	224	16	0	300
1	307	PK - VE	CLINIC	96	96	16	0	128
1	308	PK - VE	GENERAL SCHOOL STORAGE	160	160	16	0	214
1	309	PK - VE	VAULT/STUDENT RECORDS	96	96	16	0	128
1	312	PK - VE	COMPUTER AREA	48	48	16	0	64
1	314	PK - VE	ITINERANT OFFICE	125	125	0	0	167
1	315	PK - VE	TEACHER PLANNING OFFICE	660	660	33	0	884
1	316	PK - VE	TEACHER LOUNGE/DINING	132	132	33	0	176
1	330	PK - VE	CUSTODIAL RECEIVING	495	495	33	0	663
1	333	PK - VE	FLAMMABLE STORAGE	155	155	0	0	207
1	334	PK - VE	CUSTODIAL EQUIPMENT STORAGE	500	500	0	0	670
1	340	PK - VE	DINING AREA	1,320	1,320	33	0	1,768
1	341	PK - VE	KITCHEN & SERVING AREA	1,452	1,452	33	0	1,945
1	349	PK - VE	KITCHEN CHAIR STORAGE	64	64	16	0	85

EDUCATIONAL PLANT FIVE YEAR SURVEY REPORT

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Spaces	Design	Grades	Description	NSF / Space	Total NSF	Cap. / Space	Total Stns.	Total GSF
1	368	PK - VE	TEXTBOOK STORAGE	112	112	16	0	150
1	380	PK - VE	LIBRARY (READING ROOM/STACKS)	1,221	1,221	33	0	1,636
1	381	PK - VE	MEDIA TECHNICAL PROCESSING	132	132	33	0	176
1	382	PK - VE	PROFESSIONAL LIBRARY	132	132	33	0	176
1	383	PK - VE	AUDIO VISUAL STORAGE	198	198	33	0	265
1	384	PK - VE	PERIODICAL STORAGE	66	66	33	0	88
1	385	PK - VE	CLOSED CIRCUIT TV LAB	231	231	33	0	309
1	386	PK - VE	CLOSED CIRCUIT STORAGE	165	165	33	0	221
1	387	PK - VE	MEDIA PRODUCTION LAB	165	165	33	0	221
1	388	PK - VE	MEDIA COPYING ROOM	66	66	33	0	88
1	389	PK - VE	MEDIA SMALL GROUP ROOM	32	32	16	0	42
1	390	PK - VE	MEDIA GROUP PROJECTS/INSTRUCTION	165	165	33	0	221
1	391	PK - VE	MEDIA MAINTENANCE/REPAIR	32	32	16	0	42
	808		MATERIAL STORAGE	100	700	0	0	938
	808		MATERIAL STORAGE	100	400	0	0	536
	808		MATERIAL STORAGE	100	300	0	0	402
	808		MATERIAL STORAGE	100	100	0	0	134
	808		MATERIAL STORAGE	100	400	0	0	536
	808		MATERIAL STORAGE	100	1,800	0	0	2,412
	808		MATERIAL STORAGE	100	100	0	0	134
	813		STUDENT STORAGE	40	280	0	0	375
	813		STUDENT STORAGE	40	720	0	0	964
	813		STUDENT STORAGE	40	40	0	0	53
	813		STUDENT STORAGE	40	120	0	0	160
	815		STUDENT RESTROOM (MALE)	35	630	0	0	844
	815		STUDENT RESTROOM (MALE)	35	140	0	0	187
	815		STUDENT RESTROOM (MALE)	35	245	0	0	328
	816		STUDENT RESTROOM (FEMALE)	35	245	0	0	328
	816		STUDENT RESTROOM (FEMALE)	35	140	0	0	187
	816		STUDENT RESTROOM (FEMALE)	35	630	0	0	844
	817		STUDENT RESTROOM & BATH	110	1,980	0	0	2,653
	817		STUDENT RESTROOM & BATH	110	110	0	0	147

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District:

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Status:

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Level:	VOCATIONAL TECHNICAL (VE - VE)	Gross Sq. Feet:	327,985
Target Number of Stations:	1,375	Utilization:	1.000
Total Stations:	1,375	Acres Required:	37
Total Capacity:	1,650		

Spaces	Design	Grades	Description	NSF / Space	Total NSF	Cap. / Space	Total Stns.	Total GSF
1	202	09 - VE	SMALL AGRICULTURE LAB	1,100	1,100	20	20	1,474
1	204	09 - VE	LARGE AGRICULTURE LAB	2,560	2,560	20	20	3,430
12	212	09 - VE	BUSINESS EDUCATION LAB	1,460	17,520	20	240	23,476
4	222	09 - VE	SMALL DISTRIBUTIVE/DIVERSIFIED LAB	1,100	4,400	20	80	5,896
3	232	09 - VE	SMALL HOME ECONOMICS LAB	1,100	3,300	20	60	4,422
2	233	09 - VE	MEDIUM HOME ECONOMICS LAB	1,380	2,760	20	40	3,698
3	234	09 - VE	LARGE HOME ECONOMICS LAB	2,250	6,750	25	75	9,045
5	244	09 - VE	SMALL INDUSTRIAL LAB	1,100	5,500	20	100	7,370
4	245	09 - VE	MEDIUM INDUSTRIAL LAB	1,800	7,200	20	80	9,648
3	246	09 - VE	LARGE INDUSTRIAL LAB	4,000	12,000	20	60	16,080
14	252	09 - VE	SMALL HEALTH LAB	1,200	16,800	20	280	22,512
6	253	09 - VE	MEDIUM HEALTH LAB	2,200	13,200	20	120	17,688
6	254	09 - VE	LARGE HEALTH LAB	3,300	19,800	20	120	26,532
4	262	09 - VE	SMALL PUBLIC SERVICE LAB	800	3,200	20	80	4,288
1	270	09 - VE	WORK EVALUATION LAB	1,110	1,110	15	0	1,487
1	271	09 - VE	VPI LAB	705	705	15	0	944
1	300	PK - VE	PRINCIPAL/DIRECTOR OFFICE	250	250	0	0	335
2	301	PK - VE	ASSISTANT PRINCIPAL/OTHER OFFICE	175	350	0	0	469
1	302	PK - VE	BOOKKEEPING OFFICE	125	125	0	0	167
1	303	PK - VE	SECRETARIAL SPACE	158	158	0	0	211
1	304	PK - VE	RECEPTION AREA	1,394	1,394	82	0	1,867
1	305	PK - VE	PRODUCTION WORKROOM	656	656	82	0	879
1	306	PK - VE	CONFERENCE ROOM	1,148	1,148	82	0	1,538
1	307	PK - VE	CLINIC	492	492	82	0	659
1	308	PK - VE	GENERAL SCHOOL STORAGE	820	820	82	0	1,098
1	309	PK - VE	VAULT/STUDENT RECORDS	492	492	82	0	659
1	310	PK - VE	SCHOOL STORE	164	164	82	0	219
1	311	PK - VE	STUDENT ACTIVITIES	820	820	82	0	1,098
1	312	PK - VE	COMPUTER AREA	246	246	82	0	329

EDUCATIONAL PLANT FIVE YEAR SURVEY REPORT

District:

Survey:

Status:

8-CHARLOTTE COUNTY SCHOOL DISTRICT

Survey: 6 - Version: 1

Active Approved

Spaces	Design	Grades	Description	NSF / Space	Total NSF	Cap. / Space	Total Stns.	Total GSF
1	313	PK - VE	CAREERS ROOM	492	492	82	0	659
4	314	PK - VE	ITINERANT OFFICE	125	500	0	0	670
1	315	PK - VE	TEACHER PLANNING OFFICE	3,300	3,300	165	0	4,422
1	316	PK - VE	TEACHER LOUNGE/DINING	660	660	165	0	884
1	330	PK - VE	CUSTODIAL RECEIVING	2,475	2,475	165	0	3,316
1	333	PK - VE	FLAMMABLE STORAGE	155	155	0	0	207
1	334	PK - VE	CUSTODIAL EQUIPMENT STORAGE	500	500	0	0	670
1	340	PK - VE	DINING AREA	6,600	6,600	165	0	8,844
1	341	PK - VE	KITCHEN & SERVING AREA	7,260	7,260	165	0	9,728
1	349	PK - VE	KITCHEN CHAIR STORAGE	328	328	82	0	439
1	360	06 - VE	AUDITORIUM	4,950	4,950	165	0	6,633
1	362	PK - VE	MULTIPURPOSE ROOM CHAIR STORAGE	330	330	165	0	442
1	363	PK - VE	STAGE	990	990	1	0	1,326
1	364	PK - VE	STAGE STORAGE	825	825	165	0	1,105
1	367	PK - VE	CONTROL BOOTH/PROJECTION ROOM	100	100	1	0	134
1	368	PK - VE	TEXTBOOK STORAGE	574	574	82	0	769
1	369	06 - VE	STUDENT PERSONAL STORAGE	825	825	165	0	1,105
1	380	PK - VE	LIBRARY (READING ROOM/STACKS)	6,105	6,105	165	0	8,180
1	381	PK - VE	MEDIA TECHNICAL PROCESSING	660	660	165	0	884
1	382	PK - VE	PROFESSIONAL LIBRARY	660	660	165	0	884
1	383	PK - VE	AUDIO VISUAL STORAGE	990	990	165	0	1,326
1	384	PK - VE	PERIODICAL STORAGE	330	330	165	0	442
1	385	PK - VE	CLOSED CIRCUIT TV LAB	1,155	1,155	165	0	1,547
1	386	PK - VE	CLOSED CIRCUIT STORAGE	825	825	165	0	1,105
1	387	PK - VE	MEDIA PRODUCTION LAB	825	825	165	0	1,105
1	388	PK - VE	MEDIA COPYING ROOM	330	330	165	0	442
1	389	PK - VE	MEDIA SMALL GROUP ROOM	164	164	82	0	219
1	390	PK - VE	MEDIA GROUP PROJECTS/INSTRUCTION	825	825	165	0	1,105
1	391	PK - VE	MEDIA MAINTENANCE/REPAIR	164	164	82	0	219
	802		INSTRUCTIONAL CONFERENCE ROOM	225	225	0	0	301
	804		DISPENSARY	135	810	0	0	1,085
	804		DISPENSARY	135	1,890	0	0	2,532
	804		DISPENSARY	135	810	0	0	1,085
	806		REFERENCE	100	600	0	0	804

EDUCATIONAL PLANT FIVE YEAR SURVEY REPORT

District:

Survey:

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8-CHARLOTTE COUNTY SCHOOL DISTRICT

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Spaces	Design	Grades	Description	NSF / Space	Total NSF	Cap. / Space	Total Stns.	Total GSF
	806		REFERENCE	100	100	0	0	134
	806		REFERENCE	100	100	0	0	134
	806		REFERENCE	100	600	0	0	804
	808		MATERIAL STORAGE	100	1,400	0	0	1,876
	808		MATERIAL STORAGE	100	400	0	0	536
	808		MATERIAL STORAGE	100	100	0	0	134
	808		MATERIAL STORAGE	100	1,200	0	0	1,608
	808		MATERIAL STORAGE	100	600	0	0	804
	808		MATERIAL STORAGE	100	300	0	0	402
	808		MATERIAL STORAGE	100	400	0	0	536
	808		MATERIAL STORAGE	100	500	0	0	670
	808		MATERIAL STORAGE	100	200	0	0	268
	810		MATERIAL STORAGE (LARGE)	395	1,580	0	0	2,117
	810		MATERIAL STORAGE (LARGE)	395	1,185	0	0	1,587
	810		MATERIAL STORAGE (LARGE)	395	2,370	0	0	3,175
	810		MATERIAL STORAGE (LARGE)	395	395	0	0	529
	810		MATERIAL STORAGE (LARGE)	395	395	0	0	529
	810		MATERIAL STORAGE (LARGE)	395	395	0	0	529
	810		MATERIAL STORAGE (LARGE)	395	2,370	0	0	3,175
	812		PROJECT STORAGE	150	2,100	0	0	2,814
	812		PROJECT STORAGE	150	600	0	0	804
	812		PROJECT STORAGE	150	900	0	0	1,206
	812		PROJECT STORAGE	150	450	0	0	603
	812		PROJECT STORAGE	150	450	0	0	603
	818		LOCKERS/RESTROOM/SHOWER (ESE/VOC ED)	225	225	0	0	301
	818		LOCKERS/RESTROOM/SHOWER (ESE/VOC ED)	225	225	0	0	301
	818		LOCKERS/RESTROOM/SHOWER (ESE/VOC ED)	225	1,350	0	0	1,809
	840		VOCATIONAL RELATED CLASSROOM	680	4,080	20	0	5,467
	840		VOCATIONAL RELATED CLASSROOM	680	9,520	20	0	12,756
	840		VOCATIONAL RELATED CLASSROOM	680	680	20	0	911
	840		VOCATIONAL RELATED CLASSROOM	680	680	20	0	911
	840		VOCATIONAL RELATED CLASSROOM	680	680	20	0	911
	840		VOCATIONAL RELATED CLASSROOM	680	2,720	20	0	3,644
	840		VOCATIONAL RELATED CLASSROOM	680	3,400	20	0	4,556

EDUCATIONAL PLANT FIVE YEAR SURVEY REPORT

District:

Survey:

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8-CHARLOTTE COUNTY SCHOOL DISTRICT

Survey: 6 - Version: 1

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Spaces	Design	Grades	Description	NSF / Space	Total NSF	Cap. / Space	Total Stns.	Total GSF
	840		VOCATIONAL RELATED CLASSROOM	680	4,080	20	0	5,467
	840		VOCATIONAL RELATED CLASSROOM	680	2,040	20	0	2,733
	840		VOCATIONAL RELATED CLASSROOM	680	2,720	20	0	3,644
	841		GREENHOUSE	800	800	0	0	1,072
	841		GREENHOUSE	800	800	0	0	1,072
	842		KITCHEN (HOME ECONOMICS)	125	250	0	0	335
	842		KITCHEN (HOME ECONOMICS)	125	375	0	0	502
	843		LAUNDRY (HOME ECONOMICS)	50	150	0	0	201
	843		LAUNDRY (HOME ECONOMICS)	50	100	0	0	134
	846		RECEPTION (VOC ED INSTRUCTION)	90	90	0	0	120
	847		VOCATIONAL FLAMMABLE STORAGE	125	375	0	0	502
	847		VOCATIONAL FLAMMABLE STORAGE	125	125	0	0	167
	847		VOCATIONAL FLAMMABLE STORAGE	125	125	0	0	167
	848		VOCATIONAL MACHINERY STORAGE	1,100	1,100	0	0	1,474
	848		VOCATIONAL MACHINERY STORAGE	1,100	1,100	0	0	1,474
	849		VOCATIONAL PROJECT STORAGE	310	930	0	0	1,246
	849		VOCATIONAL PROJECT STORAGE	310	1,240	0	0	1,661
	849		VOCATIONAL PROJECT STORAGE	310	1,860	0	0	2,492
	849		VOCATIONAL PROJECT STORAGE	310	1,860	0	0	2,492
	850		VOCATIONAL TOOL STORAGE (SMALL)	195	780	0	0	1,045
	850		VOCATIONAL TOOL STORAGE (SMALL)	195	585	0	0	783
	850		VOCATIONAL TOOL STORAGE (SMALL)	195	195	0	0	261
	851		VOCATIONAL TOOL STORAGE (LARGE)	310	310	0	0	415
	852		VOCATIONAL TECHNOLOGY RESOURCE CENTER	800	1,600	0	0	2,144
	852		VOCATIONAL TECHNOLOGY RESOURCE CENTER	800	2,400	0	0	3,216
	852		VOCATIONAL TECHNOLOGY RESOURCE CENTER	800	2,400	0	0	3,216
	853		VOCATIONAL TESTING	250	250	0	0	335
	853		VOCATIONAL TESTING	250	250	0	0	335

EDUCATIONAL PLANT FIVE YEAR SURVEY REPORT

District:
8-CHARLOTTE COUNTY SCHOOL DISTRICT

Survey:
Survey: 6 - Version: 1

Status:
Active Approved

Level:	COMBINATION (06 - 12)	Gross Sq. Feet:	76,045
Target Number of Stations:	424	Utilization:	1.000
Total Stations:	424	Acres Required:	9
Total Capacity:	381		

Spaces	Design	Grades	Description	NSF / Space	Total NSF	Cap. / Space	Total Stns.	Total GSF
2	2	04 - 08	INTERMEDIATE/MIDDLE CLASSROOM (4-8)	858	1,716	22	44	2,299
2	3	09 - 12	SENIOR HIGH CLASSROOM (9-12)	800	1,600	25	50	2,144
2	40	PK - 12	RESOURCE ROOM	290	580	10	0	777
1	61	PK - 12	E S E PART-TIME	975	975	15	15	1,306
1	62	PK - 12	E S E FULL-TIME	950	950	10	10	1,273
2	65	PK - 12	E S E RESOURCE	380	760	4	0	1,018
1	66	PK - 12	E S E SUPPLEMENTARY INSTRUCTION	100	100	2	0	134
1	202	09 - VE	SMALL AGRICULTURE LAB	1,100	1,100	20	20	1,474
7	212	09 - VE	BUSINESS EDUCATION LAB	1,460	10,220	20	140	13,694
1	241	09 - 12	SMALL TECHNOLOGY LAB	1,625	1,625	25	25	2,177
2	244	09 - VE	SMALL INDUSTRIAL LAB	1,100	2,200	20	40	2,948
1	245	09 - VE	MEDIUM INDUSTRIAL LAB	1,800	1,800	20	20	2,412
2	252	09 - VE	SMALL HEALTH LAB	1,200	2,400	20	40	3,216
1	253	09 - VE	MEDIUM HEALTH LAB	2,200	2,200	20	20	2,948
1	270	09 - VE	WORK EVALUATION LAB	1,110	1,110	15	0	1,487
1	271	09 - VE	VPI LAB	705	705	15	0	944
1	300	PK - VE	PRINCIPAL/DIRECTOR OFFICE	250	250	0	0	335
6	301	PK - VE	ASSISTANT PRINCIPAL/OTHER OFFICE	175	1,050	0	0	1,407
3	303	PK - VE	SECRETARIAL SPACE	158	474	0	0	635
2	304	PK - VE	RECEPTION AREA	323	646	19	0	865
1	305	PK - VE	PRODUCTION WORKROOM	152	152	19	0	203
1	306	PK - VE	CONFERENCE ROOM	266	266	19	0	356
3	308	PK - VE	GENERAL SCHOOL STORAGE	190	570	19	0	763
1	309	PK - VE	VAULT/STUDENT RECORDS	114	114	19	0	152
1	311	PK - VE	STUDENT ACTIVITIES	190	190	19	0	254
1	314	PK - VE	ITINERANT OFFICE	125	125	0	0	167
1	330	PK - VE	CUSTODIAL RECEIVING	570	570	38	0	763
1	341	PK - VE	KITCHEN & SERVING AREA	1,672	1,672	38	0	2,240
1	349	PK - VE	KITCHEN CHAIR STORAGE	76	76	19	0	101

EDUCATIONAL PLANT FIVE YEAR SURVEY REPORT

District:

Survey:

Status:

8-CHARLOTTE COUNTY SCHOOL DISTRICT

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Spaces	Design	Grades	Description	NSF / Space	Total NSF	Cap. / Space	Total Stns.	Total GSF
1	351	06 - 12	MIDDLE/SR HIGH COVERED PATIO	1,368	1,368	38	0	1,833
1	361	PK - VE	MULTIPURPOSE ROOM (DINING)	1,178	1,178	38	0	1,578
1	362	PK - VE	MULTIPURPOSE ROOM CHAIR STORAGE	76	76	38	0	101
1	363	PK - VE	STAGE	990	990	1	0	1,326
1	364	PK - VE	STAGE STORAGE	190	190	38	0	254
1	365	PK - VE	STAGE DRESSING ROOM (MALE)	95	95	19	0	127
1	366	PK - VE	STAGE DRESSING ROOM (FEMALE)	95	95	19	0	127
1	367	PK - VE	CONTROL BOOTH/PROJECTION ROOM	100	100	1	0	134
1	368	PK - VE	TEXTBOOK STORAGE	133	133	19	0	178
	802		INSTRUCTIONAL CONFERENCE ROOM	225	225	0	0	301
	804		DISPENSARY	135	135	0	0	180
	804		DISPENSARY	135	270	0	0	361
	806		REFERENCE	100	100	0	0	134
	806		REFERENCE	100	100	0	0	134
	808		MATERIAL STORAGE	100	100	0	0	134
	808		MATERIAL STORAGE	100	200	0	0	268
	808		MATERIAL STORAGE	100	100	0	0	134
	808		MATERIAL STORAGE	100	200	0	0	268
	808		MATERIAL STORAGE	100	100	0	0	134
	808		MATERIAL STORAGE	100	700	0	0	938
	808		MATERIAL STORAGE	100	100	0	0	134
	808		MATERIAL STORAGE	100	200	0	0	268
	808		MATERIAL STORAGE	100	200	0	0	268
	808		MATERIAL STORAGE	100	100	0	0	134
	808		MATERIAL STORAGE	100	100	0	0	134
	808		MATERIAL STORAGE	100	200	0	0	268
	808		MATERIAL STORAGE	100	200	0	0	268
	808		MATERIAL STORAGE	100	100	0	0	134
	808		MATERIAL STORAGE	100	100	0	0	134
	808		MATERIAL STORAGE	100	200	0	0	268
	808		MATERIAL STORAGE	100	200	0	0	268
	808		MATERIAL STORAGE	100	100	0	0	134
	810		MATERIAL STORAGE (LARGE)	395	395	0	0	529
	810		MATERIAL STORAGE (LARGE)	395	395	0	0	529
	810		MATERIAL STORAGE (LARGE)	395	395	0	0	529
	810		MATERIAL STORAGE (LARGE)	395	395	0	0	529
	811		OUTSIDE STORAGE	50	100	0	0	134
	812		PROJECT STORAGE	150	150	0	0	201

EDUCATIONAL PLANT FIVE YEAR SURVEY REPORT

District:

Survey:

Status:

8-CHARLOTTE COUNTY SCHOOL DISTRICT

Survey: 6 - Version: 1

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Spaces	Design	Grades	Description	NSF / Space	Total NSF	Cap. / Space	Total Stns.	Total GSF
	812		PROJECT STORAGE	150	300	0	0	402
	813		STUDENT STORAGE	40	40	0	0	53
	813		STUDENT STORAGE	40	40	0	0	53
	813		STUDENT STORAGE	40	80	0	0	107
	815		STUDENT RESTROOM (MALE)	35	35	0	0	46
	815		STUDENT RESTROOM (MALE)	35	35	0	0	46
	815		STUDENT RESTROOM (MALE)	35	70	0	0	93
2	815	06 - 12	STUDENT RESTROOM (MALE)	38	76	19	0	101
2	816	06 - 12	STUDENT RESTROOM (FEMALE)	38	76	19	0	101
	816		STUDENT RESTROOM (FEMALE)	35	70	0	0	93
	816		STUDENT RESTROOM (FEMALE)	35	35	0	0	46
	816		STUDENT RESTROOM (FEMALE)	35	35	0	0	46
	817		STUDENT RESTROOM & BATH	110	110	0	0	147
	818		LOCKERS/RESTROOM/SHOWER (ESE/VOC ED)	225	225	0	0	301
	840		VOCATIONAL RELATED CLASSROOM	680	680	20	0	911
	840		VOCATIONAL RELATED CLASSROOM	680	1,360	20	0	1,822
	840		VOCATIONAL RELATED CLASSROOM	680	680	20	0	911
	840		VOCATIONAL RELATED CLASSROOM	680	680	20	0	911
	840		VOCATIONAL RELATED CLASSROOM	680	1,360	20	0	1,822
	840		VOCATIONAL RELATED CLASSROOM	680	680	20	0	911
	841		GREENHOUSE	800	800	0	0	1,072
	846		RECEPTION (VOC ED INSTRUCTION)	90	90	0	0	120
	847		VOCATIONAL FLAMMABLE STORAGE	125	125	0	0	167
	848		VOCATIONAL MACHINERY STORAGE	1,100	1,100	0	0	1,474
	849		VOCATIONAL PROJECT STORAGE	310	310	0	0	415
	849		VOCATIONAL PROJECT STORAGE	310	310	0	0	415
	850		VOCATIONAL TOOL STORAGE (SMALL)	195	195	0	0	261
	850		VOCATIONAL TOOL STORAGE (SMALL)	195	195	0	0	261
	852		VOCATIONAL TECHNOLOGY RESOURCE CENTER	800	800	0	0	1,072
	853		VOCATIONAL TESTING	250	250	0	0	335
	853		VOCATIONAL TESTING	250	250	0	0	335

EDUCATIONAL PLANT FIVE YEAR SURVEY REPORT

District:

8-CHARLOTTE COUNTY SCHOOL DISTRICT

Survey:

Survey: 6 - Version: 1

Status:

Active Approved

Section 3: Recommendations

EDUCATIONAL PLANT FIVE YEAR SURVEY REPORT

District:
8-CHARLOTTE COUNTY SCHOOL DISTRICT

Survey:
Survey: 6 - Version: 1

Status:
Active Approved

District Name: CHARLOTTE COUNTY SCHOOL DISTRICT

Survey: Number 6 - Version 1

Facility Name: BENJAMIN J BAKER ELEMENTARY

Address: 311 E CHARLOTTE AVENUE, PUNTA GORDA

	Existing	Recommended
Capital Outlay Classification	1 - SCHOOL RECOMMENDED FOR CONTINUED USE	1 - SCHOOL RECOMMENDED FOR CONTINUED USE
Facility Use	PRE-K E S E	PRE-K E S E
Low Grade	PRE-K E S E	PRE-K E S E
High Grade	PRE-K E S E	PRE-K E S E
Comments		

	Existing	Student Stations Added/Reduced(+ or -)	Recommended
Perm. Stations	324	0	324
Reloc. Stations	0	0	0
Mod. Stations	0	0	0
Total Stations	324	0	324
Utilization Factor	100%		100%
School Capacity	324		324
COFTE Student Membership	59		59
Survey Annotation			

New Site Cost	Site Expansion	Site Development	Site Improvement	Remodeling Cost	Renovation Cost	New Construction Cost
\$0	\$0	\$0	\$0	\$0	\$0	\$0
			Estimated Total Project Cost		\$0	

BENJAMIN J BAKER ELEMENTARY	Parcel	Building	Description	Total NSF	Change In Station Count	Calculated Cost	Cost Per NSF	Cost Per Station

EDUCATIONAL PLANT FIVE YEAR SURVEY REPORT

District: 8-CHARLOTTE COUNTY SCHOOL DISTRICT **Survey:** Survey: 6 - Version: 1 **Status:** Active Approved

District Name: CHARLOTTE COUNTY SCHOOL DISTRICT
Survey: Number 6 - Version 1
Facility Name: CHARLOTTE HARBOR SCHOOL
Address: 22450 NW HANCOCK AVENUE, CHARLOTTE HARBOR

	Existing	Recommended
Capital Outlay Classification	1 - SCHOOL RECOMMENDED FOR CONTINUED USE	1 - SCHOOL RECOMMENDED FOR CONTINUED USE
Facility Use	EXCEPTIONAL STUDENT	EXCEPTIONAL STUDENT
Low Grade	KINDERGARTEN	KINDERGARTEN
High Grade	GRADE 12	GRADE 12
Comments		

	Existing	Student Stations Added/Reduced(+ or -)	Recommended
Perm. Stations	172	30	202
Reloc. Stations	90	-90	0
Mod. Stations	0	0	0
Total Stations	262	-60	202
Utilization Factor	100%		100%
School Capacity	262		202
COFTE Student Membership	112		105
Survey Annotation	Return leased relocatables.		

New Site Cost	Site Expansion	Site Development	Site Improvement	Remodeling Cost	Renovation Cost	New Construction Cost
\$0	\$0	\$0	\$0	\$1,153,248	\$0	\$0
			Estimated Total Project Cost		\$1,153,248	

EDUCATIONAL PLANT FIVE YEAR SURVEY REPORT

District:

8-CHARLOTTE COUNTY SCHOOL DISTRICT

Survey:

Survey: 6 - Version: 1

Status:

Active Approved

CHARLOTTE HARBOR SCHOOL	Parcel	Building	Description	Total NSF	Change In Station Count	Calculated Cost	Cost Per NSF	Cost Per Station
Remodeling 2028	4	0	Removed NSF (4775), Added NSF (0), Difference NSF (4775), Percent (100%), Removed Stations (90), Added Stations (0) Remodeling: Adding and Removing Room P341 (800 NSF), Room P361 (740 NSF), Room P361A (55 NSF), Room P369 (740 NSF), Room P369A (55 NSF), Room P370 (740 NSF), Room P370A (55 NSF), Room P371 (740 NSF), Room P371A (55 NSF), Room P372 (740 NSF), Room P372A (55 NSF)	-4,775	-90	\$60,000	\$13	\$0
Remodeling 2028	4	1	Removed NSF (4992), Added NSF (4992), Difference NSF (0), Percent (0%), Removed Stations (60), Added Stations (90) Remodeling: Adding 6 units of E S E PART-TIME (832 NSF) and Removing Room 004 (751 NSF), Room 005 (801 NSF), Room 011 (831 NSF), Room 014 (728 NSF), Room 016 (1019 NSF), Room 020 (862 NSF)	4,992	30	\$1,093,248	\$219	\$0

EDUCATIONAL PLANT FIVE YEAR SURVEY REPORT

District: 8-CHARLOTTE COUNTY SCHOOL DISTRICT **Survey:** Survey: 6 - Version: 1 **Status:** Active Approved

District Name: CHARLOTTE COUNTY SCHOOL DISTRICT
Survey: Number 6 - Version 1
Facility Name: CHARLOTTE SENIOR HIGH
Address: 1250 COOPER STREET, PUNTA GORDA

	Existing	Recommended
Capital Outlay Classification	1 - SCHOOL RECOMMENDED FOR CONTINUED USE	1 - SCHOOL RECOMMENDED FOR CONTINUED USE
Facility Use	SENIOR HIGH	SENIOR HIGH
Low Grade	GRADE 9	GRADE 9
High Grade	GRADE 12	GRADE 12
Comments		

	Existing	Student Stations Added/Reduced(+ or -)	Recommended
Perm. Stations	1,853	0	1853
Reloc. Stations	0	0	0
Mod. Stations	0	0	0
Total Stations	1,853	0	1853
Utilization Factor	95%		95%
School Capacity	1,760		1760
COFTE Student Membership	1,781		1,680
Survey Annotation			

New Site Cost	Site Expansion	Site Development	Site Improvement	Remodeling Cost	Renovation Cost	New Construction Cost
\$0	\$0	\$0	\$0	\$0	\$0	\$0
			Estimated Total Project Cost		\$0	

CHARLOTTE SENIOR HIGH	Parcel	Building	Description	Total NSF	Change In Station Count	Calculated Cost	Cost Per NSF	Cost Per Station

EDUCATIONAL PLANT FIVE YEAR SURVEY REPORT

District:
8-CHARLOTTE COUNTY SCHOOL DISTRICT

Survey:
Survey: 6 - Version: 1

Status:
Active Approved

District Name: CHARLOTTE COUNTY SCHOOL DISTRICT

Survey: Number 6 - Version 1

Facility Name: CHARLOTTE TECHNICAL COLLEGE

Address: 18150 MURDOCK CIRCLE, PORT CHARLOTTE

	Existing	Recommended
Capital Outlay Classification	1 - SCHOOL RECOMMENDED FOR CONTINUED USE	1 - SCHOOL RECOMMENDED FOR CONTINUED USE
Facility Use	VOCATIONAL TECHNICAL	VOCATIONAL TECHNICAL
Low Grade	VOCATIONAL EDUCATION	VOCATIONAL EDUCATION
High Grade	VOCATIONAL EDUCATION	VOCATIONAL EDUCATION
Comments		

	Existing	Student Stations Added/Reduced(+ or -)	Recommended
Perm. Stations	789	0	789
Reloc. Stations	0	0	0
Mod. Stations	0	0	0
Total Stations	789	0	789
Utilization Factor	120%		120%
School Capacity	946		946
COFTE Student Membership	203		175
Survey Annotation			

New Site Cost	Site Expansion	Site Development	Site Improvement	Remodeling Cost	Renovation Cost	New Construction Cost
\$0	\$0	\$0	\$0	\$0	\$0	\$0
			Estimated Total Project Cost		\$0	

CHARLOTTE TECHNICAL COLLEGE	Parcel	Building	Description	Total NSF	Change In Station Count	Calculated Cost	Cost Per NSF	Cost Per Station

EDUCATIONAL PLANT FIVE YEAR SURVEY REPORT

District:
8-CHARLOTTE COUNTY SCHOOL DISTRICT

Survey:
Survey: 6 - Version: 1

Status:
Active Approved

District Name: CHARLOTTE COUNTY SCHOOL DISTRICT

Survey: Number 6 - Version 1

Facility Name: DEEP CREEK ELEMENTARY

Address: 26900 HARBORVIEW ROAD, PUNTA GORDA

	Existing	Recommended
Capital Outlay Classification	1 - SCHOOL RECOMMENDED FOR CONTINUED USE	1 - SCHOOL RECOMMENDED FOR CONTINUED USE
Facility Use	ELEMENTARY	ELEMENTARY
Low Grade	PRE-K E S E	PRE-K E S E
High Grade	GRADE 5	GRADE 5
Comments		

	Existing	Student Stations Added/Reduced(+ or -)	Recommended
Perm. Stations	671	0	671
Reloc. Stations	213	0	213
Mod. Stations	0	0	0
Total Stations	884	0	884
Utilization Factor	100%		100%
School Capacity	884		884
COFTE Student Membership	811		812
Survey Annotation	When the Survey was opened, there were relocatables at this site. However, they were destroyed by Hurricane Ian and have been removed.		

New Site Cost	Site Expansion	Site Development	Site Improvement	Remodeling Cost	Renovation Cost	New Construction Cost
\$0	\$0	\$0	\$0	\$0	\$0	\$0
			Estimated Total Project Cost		\$0	

DEEP CREEK ELEMENTARY	Parcel	Building	Description	Total NSF	Change In Station Count	Calculated Cost	Cost Per NSF	Cost Per Station

EDUCATIONAL PLANT FIVE YEAR SURVEY REPORT

District:
8-CHARLOTTE COUNTY SCHOOL DISTRICT

Survey:
Survey: 6 - Version: 1

Status:
Active Approved

District Name: CHARLOTTE COUNTY SCHOOL DISTRICT

Survey: Number 6 - Version 1

Facility Name: EAST ELEMENTARY

Address: 27050 N FAIRWAY, PUNTA GORDA

	Existing	Recommended
Capital Outlay Classification	1 - SCHOOL RECOMMENDED FOR CONTINUED USE	1 - SCHOOL RECOMMENDED FOR CONTINUED USE
Facility Use	ELEMENTARY	ELEMENTARY
Low Grade	PRE-K E S E	PRE-K E S E
High Grade	GRADE 5	GRADE 5
Comments		

	Existing	Student Stations Added/Reduced(+ or -)	Recommended
Perm. Stations	861	0	861
Reloc. Stations	0	0	0
Mod. Stations	0	0	0
Total Stations	861	0	861
Utilization Factor	100%		100%
School Capacity	861		861
COFTE Student Membership	665		670
Survey Annotation			

New Site Cost	Site Expansion	Site Development	Site Improvement	Remodeling Cost	Renovation Cost	New Construction Cost
\$0	\$0	\$0	\$0	\$0	\$0	\$0
			Estimated Total Project Cost		\$0	

EAST ELEMENTARY	Parcel	Building	Description	Total NSF	Change In Station Count	Calculated Cost	Cost Per NSF	Cost Per Station

EDUCATIONAL PLANT FIVE YEAR SURVEY REPORT

District:
8-CHARLOTTE COUNTY SCHOOL DISTRICT

Survey:
Survey: 6 - Version: 1

Status:
Active Approved

District Name: CHARLOTTE COUNTY SCHOOL DISTRICT

Survey: Number 6 - Version 1

Facility Name: KINGSWAY ELEMENTARY

Address: 23300 QUASAR BOULEVARD, PORT CHARLOTTE

	Existing	Recommended
Capital Outlay Classification	1 - SCHOOL RECOMMENDED FOR CONTINUED USE	1 - SCHOOL RECOMMENDED FOR CONTINUED USE
Facility Use	ELEMENTARY	ELEMENTARY
Low Grade	PRE-K E S E	PRE-K E S E
High Grade	GRADE 5	GRADE 5
Comments		

	Existing	Student Stations Added/Reduced(+ or -)	Recommended
Perm. Stations	732	0	732
Reloc. Stations	0	0	0
Mod. Stations	0	0	0
Total Stations	732	0	732
Utilization Factor	100%		100%
School Capacity	732		732
COFTE Student Membership	593		602
Survey Annotation			

New Site Cost	Site Expansion	Site Development	Site Improvement	Remodeling Cost	Renovation Cost	New Construction Cost
\$0	\$0	\$0	\$0	\$0	\$0	\$0
			Estimated Total Project Cost		\$0	

KINGSWAY ELEMENTARY	Parcel	Building	Description	Total NSF	Change In Station Count	Calculated Cost	Cost Per NSF	Cost Per Station

EDUCATIONAL PLANT FIVE YEAR SURVEY REPORT

District: 8-CHARLOTTE COUNTY SCHOOL DISTRICT **Survey:** Survey: 6 - Version: 1 **Status:** Active Approved

District Name: CHARLOTTE COUNTY SCHOOL DISTRICT
Survey: Number 6 - Version 1
Facility Name: L A AINGER MIDDLE
Address: 245 COUGAR WAY, ROTONDA WEST

	Existing	Recommended
Capital Outlay Classification	1 - SCHOOL RECOMMENDED FOR CONTINUED USE	1 - SCHOOL RECOMMENDED FOR CONTINUED USE
Facility Use	MIDDLE	MIDDLE
Low Grade	GRADE 6	GRADE 6
High Grade	GRADE 8	GRADE 8
Comments		

	Existing	Student Stations Added/Reduced(+ or -)	Recommended
Perm. Stations	1,076	0	1076
Reloc. Stations	0	0	0
Mod. Stations	0	0	0
Total Stations	1,076	0	1076
Utilization Factor	90%		90%
School Capacity	968		968
COFTE Student Membership	704		750
Survey Annotation			

New Site Cost	Site Expansion	Site Development	Site Improvement	Remodeling Cost	Renovation Cost	New Construction Cost
\$0	\$0	\$0	\$0	\$0	\$0	\$0
Estimated Total Project Cost					\$0	

L A AINGER MIDDLE	Parcel	Building	Description	Total NSF	Change In Station Count	Calculated Cost	Cost Per NSF	Cost Per Station

EDUCATIONAL PLANT FIVE YEAR SURVEY REPORT

District:

8-CHARLOTTE COUNTY SCHOOL DISTRICT

Survey:

Survey: 6 - Version: 1

Status:

Active Approved

District Name: CHARLOTTE COUNTY SCHOOL DISTRICT

Survey: Number 6 - Version 1

Facility Name: LEMON BAY SENIOR HIGH

Address: 2201 PLACIDA ROAD, ENGLEWOOD

	Existing	Recommended
Capital Outlay Classification	1 - SCHOOL RECOMMENDED FOR CONTINUED USE	1 - SCHOOL RECOMMENDED FOR CONTINUED USE
Facility Use	SENIOR HIGH	SENIOR HIGH
Low Grade	GRADE 9	GRADE 9
High Grade	GRADE 12	GRADE 12
Comments		

	Existing	Student Stations Added/Reduced(+ or -)	Recommended
Perm. Stations	1,428	0	1428
Reloc. Stations	0	0	0
Mod. Stations	0	0	0
Total Stations	1,428	0	1428
Utilization Factor	90%		90%
School Capacity	1,285		1285
COFTE Student Membership	1,170		1,075
Survey Annotation			

New Site Cost	Site Expansion	Site Development	Site Improvement	Remodeling Cost	Renovation Cost	New Construction Cost
\$0	\$0	\$0	\$0	\$0	\$0	\$0
			Estimated Total Project Cost		\$0	

LEMON BAY SENIOR HIGH	Parcel	Building	Description	Total NSF	Change In Station Count	Calculated Cost	Cost Per NSF	Cost Per Station

EDUCATIONAL PLANT FIVE YEAR SURVEY REPORT

District:

8-CHARLOTTE COUNTY SCHOOL DISTRICT

Survey:

Survey: 6 - Version: 1

Status:

Active Approved

District Name: CHARLOTTE COUNTY SCHOOL DISTRICT

Survey: Number 6 - Version 1

Facility Name: LIBERTY ELEMENTARY

Address: 370 ATWATER STREET, PORT CHARLOTTE

	Existing	Recommended
Capital Outlay Classification	1 - SCHOOL RECOMMENDED FOR CONTINUED USE	1 - SCHOOL RECOMMENDED FOR CONTINUED USE
Facility Use	ELEMENTARY	ELEMENTARY
Low Grade	PRE-K E S E	PRE-K E S E
High Grade	GRADE 5	GRADE 5
Comments		

	Existing	Student Stations Added/Reduced(+ or -)	Recommended
Perm. Stations	655	0	655
Reloc. Stations	0	0	0
Mod. Stations	0	0	0
Total Stations	655	0	655
Utilization Factor	100%		100%
School Capacity	655		655
COFTE Student Membership	551		555
Survey Annotation			

New Site Cost	Site Expansion	Site Development	Site Improvement	Remodeling Cost	Renovation Cost	New Construction Cost
\$0	\$0	\$0	\$0	\$0	\$0	\$0
			Estimated Total Project Cost		\$0	

LIBERTY ELEMENTARY	Parcel	Building	Description	Total NSF	Change In Station Count	Calculated Cost	Cost Per NSF	Cost Per Station

EDUCATIONAL PLANT FIVE YEAR SURVEY REPORT

District:
8-CHARLOTTE COUNTY SCHOOL DISTRICT

Survey:
Survey: 6 - Version: 1

Status:
Active Approved

District Name: CHARLOTTE COUNTY SCHOOL DISTRICT

Survey: Number 6 - Version 1

Facility Name: MEADOW PARK ELEMENTARY

Address: 750 ESSEX AVENUE, PORT CHARLOTTE

	Existing	Recommended
Capital Outlay Classification	1 - SCHOOL RECOMMENDED FOR CONTINUED USE	1 - SCHOOL RECOMMENDED FOR CONTINUED USE
Facility Use	ELEMENTARY	ELEMENTARY
Low Grade	PRE-K E S E	PRE-K E S E
High Grade	GRADE 5	GRADE 5
Comments		

	Existing	Student Stations Added/Reduced(+ or -)	Recommended
Perm. Stations	865	0	865
Reloc. Stations	0	0	0
Mod. Stations	0	0	0
Total Stations	865	0	865
Utilization Factor	100%		100%
School Capacity	865		865
COFTE Student Membership	700		714
Survey Annotation			

New Site Cost	Site Expansion	Site Development	Site Improvement	Remodeling Cost	Renovation Cost	New Construction Cost
\$0	\$0	\$0	\$0	\$0	\$0	\$0
			Estimated Total Project Cost		\$0	

MEADOW PARK ELEMENTARY	Parcel	Building	Description	Total NSF	Change In Station Count	Calculated Cost	Cost Per NSF	Cost Per Station

EDUCATIONAL PLANT FIVE YEAR SURVEY REPORT

District:
8-CHARLOTTE COUNTY SCHOOL DISTRICT

Survey:
Survey: 6 - Version: 1

Status:
Active Approved

District Name: CHARLOTTE COUNTY SCHOOL DISTRICT

Survey: Number 6 - Version 1

Facility Name: MURDOCK CENTER

Address: 1445 EDUCATION WAY, PORT CHARLOTTE

	Existing	Recommended
Capital Outlay Classification	6 - ANCILLARY RECOMMENDED FOR CONTINUED USE	6 - ANCILLARY RECOMMENDED FOR CONTINUED USE
Facility Use	MULTIPLE USE SUPPORT	MULTIPLE USE SUPPORT
Low Grade	DISTRICT SERVICES	DISTRICT SERVICES
High Grade	DISTRICT SERVICES	DISTRICT SERVICES
Comments		

	Existing	Student Stations Added/Reduced(+ or -)	Recommended
Perm. Stations	0	0	0
Reloc. Stations	0	0	0
Mod. Stations	0	0	0
Total Stations	0	0	0
Utilization Factor	0%		0%
School Capacity	0		0
COFTE Student Membership	0		0
Survey Annotation	Remove leased relocatable and relocatables > 20 years old when funds permit.		

New Site Cost	Site Expansion	Site Development	Site Improvement	Remodeling Cost	Renovation Cost	New Construction Cost
\$0	\$0	\$0	\$0	\$30,000	\$0	\$0
			Estimated Total Project Cost		\$30,000	

MURDOCK CENTER	Parcel	Building	Description	Total NSF	Change In Station Count	Calculated Cost	Cost Per NSF	Cost Per Station
Remodeling 2024	20	0	Removed NSF (840), Added NSF (0), Difference NSF (840), Percent (100%), Removed Stations (0), Added Stations (0) Remodeling: Adding and Removing Room 380 (840 NSF)	-840	0	\$10,000	\$12	\$0

EDUCATIONAL PLANT FIVE YEAR SURVEY REPORT

District:

8-CHARLOTTE COUNTY SCHOOL DISTRICT

Survey:

Survey: 6 - Version: 1

Status:

Active Approved

MURDOCK CENTER	Parcel	Building	Description	Total NSF	Change In Station Count	Calculated Cost	Cost Per NSF	Cost Per Station
Remodeling 2023	20	99	Removed NSF (816), Added NSF (0), Difference NSF (816), Percent (100%), Removed Stations (0), Added Stations (0) Remodeling: Adding and Removing Room 107 (408 NSF), Room 108 (408 NSF)	-816	0	\$20,000	\$25	\$0

EDUCATIONAL PLANT FIVE YEAR SURVEY REPORT

District:
8-CHARLOTTE COUNTY SCHOOL DISTRICT

Survey:
Survey: 6 - Version: 1

Status:
Active Approved

District Name: CHARLOTTE COUNTY SCHOOL DISTRICT

Survey: Number 6 - Version 1

Facility Name: MURDOCK MIDDLE

Address: 17325 MARINER WAY, PORT CHARLOTTE

	Existing	Recommended
Capital Outlay Classification	1 - SCHOOL RECOMMENDED FOR CONTINUED USE	1 - SCHOOL RECOMMENDED FOR CONTINUED USE
Facility Use	MIDDLE	MIDDLE
Low Grade	GRADE 6	GRADE 6
High Grade	GRADE 8	GRADE 8
Comments		

	Existing	Student Stations Added/Reduced(+ or -)	Recommended
Perm. Stations	954	0	954
Reloc. Stations	0	0	0
Mod. Stations	0	0	0
Total Stations	954	0	954
Utilization Factor	90%		90%
School Capacity	858		858
COFTE Student Membership	633		650
Survey Annotation			

New Site Cost	Site Expansion	Site Development	Site Improvement	Remodeling Cost	Renovation Cost	New Construction Cost
\$0	\$0	\$0	\$0	\$0	\$0	\$0
			Estimated Total Project Cost		\$0	

MURDOCK MIDDLE	Parcel	Building	Description	Total NSF	Change In Station Count	Calculated Cost	Cost Per NSF	Cost Per Station

EDUCATIONAL PLANT FIVE YEAR SURVEY REPORT

District: 8-CHARLOTTE COUNTY SCHOOL DISTRICT **Survey:** Survey: 6 - Version: 1 **Status:** Active Approved

District Name: CHARLOTTE COUNTY SCHOOL DISTRICT

Survey: Number 6 - Version 1

Facility Name: MURDOCK TRANSPORTATION

Address: 17490 ABBOTT AVENUE, PORT CHARLOTTE

	Existing	Recommended
Capital Outlay Classification	6 - ANCILLARY RECOMMENDED FOR CONTINUED USE	6 - ANCILLARY RECOMMENDED FOR CONTINUED USE
Facility Use	TRANSPORTATION	TRANSPORTATION
Low Grade	DISTRICT SERVICES	DISTRICT SERVICES
High Grade	DISTRICT SERVICES	DISTRICT SERVICES
Comments		

	Existing	Student Stations Added/Reduced(+ or -)	Recommended
Perm. Stations	0	0	0
Reloc. Stations	0	0	0
Mod. Stations	0	0	0
Total Stations	0	0	0
Utilization Factor	0%		0%
School Capacity	0		0
COFTE Student Membership	0		0
Survey Annotation			

New Site Cost	Site Expansion	Site Development	Site Improvement	Remodeling Cost	Renovation Cost	New Construction Cost
\$0	\$0	\$0	\$0	\$0	\$0	\$0
			Estimated Total Project Cost		\$0	

MURDOCK TRANSPORTATION	Parcel	Building	Description	Total NSF	Change In Station Count	Calculated Cost	Cost Per NSF	Cost Per Station

EDUCATIONAL PLANT FIVE YEAR SURVEY REPORT

District:
8-CHARLOTTE COUNTY SCHOOL DISTRICT

Survey:
Survey: 6 - Version: 1

Status:
Active Approved

District Name: CHARLOTTE COUNTY SCHOOL DISTRICT

Survey: Number 6 - Version 1

Facility Name: MYAKKA RIVER ELEMENTARY

Address: 12650 WILMINGTON BLVD., PORT CHARLOTTE

	Existing	Recommended
Capital Outlay Classification	1 - SCHOOL RECOMMENDED FOR CONTINUED USE	1 - SCHOOL RECOMMENDED FOR CONTINUED USE
Facility Use	ELEMENTARY	ELEMENTARY
Low Grade	PRE-K E S E	PRE-K E S E
High Grade	GRADE 5	GRADE 5
Comments		

	Existing	Student Stations Added/Reduced(+ or -)	Recommended
Perm. Stations	667	0	667
Reloc. Stations	0	0	0
Mod. Stations	0	0	0
Total Stations	667	0	667
Utilization Factor	100%		100%
School Capacity	667		667
COFTE Student Membership	577		582
Survey Annotation			

New Site Cost	Site Expansion	Site Development	Site Improvement	Remodeling Cost	Renovation Cost	New Construction Cost
\$0	\$0	\$0	\$0	\$0	\$0	\$0
			Estimated Total Project Cost		\$0	

MYAKKA RIVER ELEMENTARY	Parcel	Building	Description	Total NSF	Change In Station Count	Calculated Cost	Cost Per NSF	Cost Per Station

EDUCATIONAL PLANT FIVE YEAR SURVEY REPORT

District:

8-CHARLOTTE COUNTY SCHOOL DISTRICT

Survey:

Survey: 6 - Version: 1

Status:

Active Approved

District Name: CHARLOTTE COUNTY SCHOOL DISTRICT

Survey: Number 6 - Version 1

Facility Name: NEIL ARMSTRONG ELEMENTARY

Address: 22100 BREEZESWEPT AVENUE, PORT CHARLOTTE

	Existing	Recommended
Capital Outlay Classification	1 - SCHOOL RECOMMENDED FOR CONTINUED USE	1 - SCHOOL RECOMMENDED FOR CONTINUED USE
Facility Use	ELEMENTARY	ELEMENTARY
Low Grade	PRE-K E S E	PRE-K E S E
High Grade	GRADE 5	GRADE 5
Comments		

	Existing	Student Stations Added/Reduced(+ or -)	Recommended
Perm. Stations	861	0	861
Reloc. Stations	0	0	0
Mod. Stations	0	0	0
Total Stations	861	0	861
Utilization Factor	100%		100%
School Capacity	861		861
COFTE Student Membership	730		720
Survey Annotation			

New Site Cost	Site Expansion	Site Development	Site Improvement	Remodeling Cost	Renovation Cost	New Construction Cost
\$0	\$0	\$0	\$0	\$0	\$0	\$0
			Estimated Total Project Cost		\$0	

NEIL ARMSTRONG ELEMENTARY	Parcel	Building	Description	Total NSF	Change In Station Count	Calculated Cost	Cost Per NSF	Cost Per Station

EDUCATIONAL PLANT FIVE YEAR SURVEY REPORT

District: 8-CHARLOTTE COUNTY SCHOOL DISTRICT **Survey:** Survey: 6 - Version: 1 **Status:** Active Approved

District Name: CHARLOTTE COUNTY SCHOOL DISTRICT
Survey: Number 6 - Version 1
Facility Name: PEACE RIVER ELEMENTARY
Address: 4070 Beaver Lane, PORT CHARLOTTE

	Existing	Recommended
Capital Outlay Classification	1 - SCHOOL RECOMMENDED FOR CONTINUED USE	1 - SCHOOL RECOMMENDED FOR CONTINUED USE
Facility Use	ELEMENTARY	ELEMENTARY
Low Grade	PRE-K E S E	PRE-K E S E
High Grade	GRADE 5	GRADE 5
Comments		

	Existing	Student Stations Added/Reduced(+ or -)	Recommended
Perm. Stations	861	0	861
Reloc. Stations	0	0	0
Mod. Stations	0	0	0
Total Stations	861	0	861
Utilization Factor	100%		100%
School Capacity	861		861
COFTE Student Membership	569		583
Survey Annotation			

New Site Cost	Site Expansion	Site Development	Site Improvement	Remodeling Cost	Renovation Cost	New Construction Cost
\$0	\$0	\$0	\$0	\$0	\$0	\$0
			Estimated Total Project Cost		\$0	

PEACE RIVER ELEMENTARY	Parcel	Building	Description	Total NSF	Change In Station Count	Calculated Cost	Cost Per NSF	Cost Per Station

EDUCATIONAL PLANT FIVE YEAR SURVEY REPORT

District: 8-CHARLOTTE COUNTY SCHOOL DISTRICT **Survey:** Survey: 6 - Version: 1 **Status:** Active Approved

District Name: CHARLOTTE COUNTY SCHOOL DISTRICT
Survey: Number 6 - Version 1
Facility Name: PORT CHARLOTTE MIDDLE
Address: 23000 MIDWAY BOULEVARD NE, PORT CHARLOTTE

	Existing	Recommended
Capital Outlay Classification	1 - SCHOOL RECOMMENDED FOR CONTINUED USE	1 - SCHOOL RECOMMENDED FOR CONTINUED USE
Facility Use	MIDDLE	MIDDLE
Low Grade	GRADE 6	GRADE 6
High Grade	GRADE 8	GRADE 8
Comments		

	Existing	Student Stations Added/Reduced(+ or -)	Recommended
Perm. Stations	1,166	-142	1024
Reloc. Stations	0	0	0
Mod. Stations	0	0	0
Total Stations	1,166	-142	1024
Utilization Factor	90%		90%
School Capacity	1,049		921
COFTE Student Membership	847		875
Survey Annotation	Building 1 is to be demolished per Castaldi approved by DOE on November 22, 2011. Re-build will be with local \$.		

New Site Cost	Site Expansion	Site Development	Site Improvement	Remodeling Cost	Renovation Cost	New Construction Cost
\$0	\$0	\$100,000	\$0	\$1,000,000	\$0	\$29,883,437
Estimated Total Project Cost					\$30,983,437	

PORT CHARLOTTE MIDDLE	Parcel	Building	Description	Total NSF	Change In Station Count	Calculated Cost	Cost Per NSF	Cost Per Station
New Construction 2025			New Construction: Adding 1 unit of E S E PT/OT LAB (475 NSF)	725	0	\$273,325	\$377	\$0

EDUCATIONAL PLANT FIVE YEAR SURVEY REPORT

District:

Survey:

Status:

8-CHARLOTTE COUNTY SCHOOL DISTRICT

Survey: 6 - Version: 1

Active Approved

PORT CHARLOTTE MIDDLE	Parcel	Building	Description	Total NSF	Change In Station Count	Calculated Cost	Cost Per NSF	Cost Per Station
New Construction 2025			New Construction: Adding 1 unit of E S E RESOURCE (380 NSF), 3 units of E S E ITINERANT (289 NSF), 2 units of INTERMEDIATE/MIDDLE SCIENCE DEMO (4-8) (814 NSF), 3 units of INTERMEDIATE/MIDDLE SCIENCE LAB (4-8) (1122 NSF), 20 units of INTERMEDIATE/MIDDLE CLASSROOM (4-8) (858 NSF), 1 unit of E S E FULL-TIME (950 NSF)	30,761	560	\$16,112,880	\$524	\$28,773
New Construction 2025			New Construction: Adding 1 unit of JR HIGH GYMNASIUM (5800 NSF), 1 unit of LOBBY (461 NSF), 1 unit of TICKET BOOTH (30 NSF), 1 unit of PUBLIC USE RESTROOM (MALE) (100 NSF), 1 unit of PUBLIC USE RESTROOM (FEMALE) (100 NSF), 1 unit of GYMNASIUM SEATING (8749 NSF), 1 unit of P E DRYING AREA (MALE) (92 NSF), 1 unit of P E DRYING AREA (FEMALE) (92 NSF), 1 unit of P E TEACHERS SHOWER (MALE) (82 NSF), 1 unit of P E TEACHERS SHOWER (FEMALE) (82 NSF), 1 unit of P E DRESSING ROOM (MALE) (553 NSF), 1 unit of P E DRESSING ROOM (FEMALE) (553 NSF), 1 unit of P E LOCKER ROOM (MALE) (92 NSF), 1 unit of P E LOCKER ROOM (FEMALE) (92 NSF), 1 unit of P E SHOWER (MALE) (92 NSF), 1 unit of P E SHOWER (FEMALE) (92 NSF), 1 unit of P E LAUNDRY (92 NSF), 1 unit of P E FIRST AID (92 NSF), 1 unit of P E MULTIPURPOSE ROOM (MIDDLE-SR HIGH) (1050 NSF), 1 unit of P E STORAGE (MIDDLE-SR HIGH) (415 NSF), 1 unit of P E WEIGHT ROOM (1000 NSF), 1 unit of GYMNASIUM STORAGE (138 NSF)	19,849	80	\$2,301,840	\$116	\$28,773

EDUCATIONAL PLANT FIVE YEAR SURVEY REPORT

District:

Survey:

Status:

8-CHARLOTTE COUNTY SCHOOL DISTRICT

Survey: 6 - Version: 1

Active Approved

PORT CHARLOTTE MIDDLE	Parcel	Building	Description	Total NSF	Change In Station Count	Calculated Cost	Cost Per NSF	Cost Per Station
New Construction 2025			New Construction: Adding 9 units of ASSISTANT PRINCIPAL/OTHER OFFICE (175 NSF), 1 unit of BOOKKEEPING OFFICE (125 NSF), 2 units of SECRETARIAL SPACE (158 NSF), 1 unit of VAULT/STUDENT RECORDS (276 NSF), 1 unit of RECEPTION AREA (783 NSF), 1 unit of PRODUCTION WORKROOM (369 NSF), 1 unit of CONFERENCE ROOM (645 NSF), 1 unit of CLINIC (276 NSF), 1 unit of GENERAL SCHOOL STORAGE (461 NSF), 1 unit of SCHOOL STORE (76 NSF), 1 unit of STUDENT ACTIVITIES (380 NSF), 1 unit of COMPUTER AREA (138 NSF), 1 unit of CAREERS ROOM (276 NSF), 2 units of ITINERANT OFFICE (125 NSF), 1 unit of TEACHER LOUNGE/DINING (369 NSF), 1 unit of STAFF RESTROOM (MALE) (60 NSF), 1 unit of STAFF RESTROOM (FEMALE) (60 NSF), 1 unit of STUDENT RESTROOM (MALE) (60 NSF), 1 unit of STUDENT RESTROOM (FEMALE) (60 NSF), 1 unit of STUDENT RESTROOM & BATH (110 NSF), 1 unit of PUBLIC USE RESTROOM (MALE) (60 NSF), 1 unit of PUBLIC USE RESTROOM (FEMALE) (60 NSF)	6,785	0	\$2,557,945	\$377	\$0
New Construction 2025			New Construction: Adding 1 unit of FLAMMABLE STORAGE (155 NSF), 1 unit of CUSTODIAL RECEIVING (1382 NSF), 1 unit of CUSTODIAL EQUIPMENT STORAGE (500 NSF), 1 unit of STAFF RESTROOM (BOTH SEXES) (100 NSF), 1 unit of DINING AREA (3686 NSF), 1 unit of KITCHEN & SERVING AREA (4055 NSF), 1 unit of KITCHEN CHAIR STORAGE (92 NSF), 1 unit of MULTIPURPOSE ROOM (DINING) (2857 NSF), 1 unit of MULTIPURPOSE ROOM CHAIR STORAGE (92 NSF), 1 unit of STAGE (990 NSF), 1 unit of STAGE STORAGE (461 NSF), 1 unit of STAGE DRESSING ROOM (MALE) (230 NSF), 1 unit of STAGE DRESSING ROOM (FEMALE) (230 NSF), 1 unit of CONTROL BOOTH/PROJECTION ROOM (100 NSF), 1 unit of STAFF RESTROOM (MALE) (60 NSF), 1 unit of STAFF RESTROOM (FEMALE) (60 NSF), 1 unit of STUDENT RESTROOM (MALE) (200 NSF), 1 unit of STUDENT RESTROOM (FEMALE) (200 NSF)	15,450	0	\$5,824,650	\$377	\$0

EDUCATIONAL PLANT FIVE YEAR SURVEY REPORT

District:

Survey:

Status:

8-CHARLOTTE COUNTY SCHOOL DISTRICT

Survey: 6 - Version: 1

Active Approved

PORT CHARLOTTE MIDDLE	Parcel	Building	Description	Total NSF	Change In Station Count	Calculated Cost	Cost Per NSF	Cost Per Station
New Construction 2025			New Construction: Adding 1 unit of LIBRARY (READING ROOM/STACKS) (3410 NSF), 1 unit of MEDIA TECHNICAL PROCESSING (369 NSF), 1 unit of PROFESSIONAL LIBRARY (369 NSF), 1 unit of AUDIO VISUAL STORAGE (553 NSF), 1 unit of PERIODICAL STORAGE (184 NSF), 1 unit of CLOSED CIRCUIT TV LAB (645 NSF), 1 unit of CLOSED CIRCUIT STORAGE (461 NSF), 1 unit of MEDIA PRODUCTION LAB (461 NSF), 1 unit of MEDIA COPYING ROOM (184 NSF), 1 unit of MEDIA SMALL GROUP ROOM (92 NSF), 1 unit of MEDIA GROUP PROJECTS/INSTRUCTION (461 NSF), 1 unit of MEDIA MAINTENANCE/REPAIR (92 NSF), 1 unit of STAFF RESTROOM (BOTH SEXES) (60 NSF), 1 unit of STUDENT RESTROOM (MALE) (60 NSF), 1 unit of STUDENT RESTROOM (FEMALE) (60 NSF)	7,461	0	\$2,812,797	\$377	\$0
Remodeling 2025	10	1	Removed NSF (85685), Added NSF (0), Difference NSF (85685), Percent (100%), Removed Stations (782), Added Stations (0) Remodeling: Adding and Removing Room 001 (752 NSF), Room 001A (33 NSF), Room 001B (75 NSF), Room 005 (70 NSF), Room 005A (46 NSF), Room 005B (46 NSF), Room 005C (159 NSF), Room 007 (752 NSF), Room 007A (33 NSF), Room 007B (75 NSF), Room 011 (780 NSF), Room 011A (33 NSF), Room 011B (75 NSF), Room 015 (70 NSF), Room 015A (46 NSF), Room 015B (46 NSF), Room 015C (159 NSF), Room 017 (778 NSF), Room 017A (33 NSF), Room 017B (75 NSF), Room 100 (391 NSF), Room 100A (171 NSF), Room 102 (494 NSF), Room 103 (130 NSF), Room 104 (120 NSF), Room 105 (120 NSF), Room 106 (120 NSF), Room 107 (122 NSF), Room 110 (85 NSF), Room 110A (129 NSF), Room 110B (33 NSF), Room 110C (63 NSF), Room 112 (131 NSF), Room 112A (33 NSF), Room 114 (210 NSF), Room 115 (190 NSF), Room 116 (165 NSF), Room 117 (23 NSF), Room 118 (23 NSF), Room 119 (155 NSF), Room 119A (53 NSF), Room 120 (189 NSF), Room 121 (160 NSF), Room 122 (64 NSF), Room 123 (69 NSF), Room 124 (236 NSF), Room 125 (1112 NSF), Room 126 (770 NSF), Room 127 (764 NSF), Room 128 (759 NSF), Room 129 (315 NSF), Room 130 (755 NSF), Room 131	-85,685	-782	\$1,000,000	\$12	\$0

EDUCATIONAL PLANT FIVE YEAR SURVEY REPORT

District:

8-CHARLOTTE COUNTY SCHOOL DISTRICT

Survey:

Survey: 6 - Version: 1

Status:

Active Approved

		(765 NSF), Room 132 (768 NSF), Room 133 (1202 NSF), Room 134 (1029 NSF), Room 135 (1116 NSF), Room 136 (5216 NSF), Room 136A (119 NSF), Room 137 (119 NSF), Room 138 (200 NSF), Room 139 (280 NSF), Room 141 (240 NSF), Room 143 (288 NSF), Room 144 (70 NSF), Room 145 (87 NSF), Room 146 (314 NSF), Room 147 (1116 NSF), Room 148 (772 NSF), Room 149 (764 NSF), Room 150 (756 NSF), Room 151 (300 NSF), Room 152 (755 NSF), Room 153 (764 NSF), Room 154 (773 NSF), Room 155 (1028 NSF), Room 156 (1196 NSF), Room 157 (1111 NSF), Room 158 (4020 NSF), Room 159 (1455 NSF), Room 160 (1251 NSF), Room 161 (770 NSF), Room 161A (589 NSF), Room 162 (53 NSF), Room 165 (1434 NSF), Room 165A (189 NSF), Room 165B (136 NSF), Room 165C (25 NSF), Room 165D (132 NSF), Room 165E (147 NSF), Room 165F (101 NSF), Room 165G (98 NSF), Room 167 (88 NSF), Room 168 (67 NSF), Room 170 (40 NSF), Room 171 (88 NSF), Room 172 (2892 NSF), Room 172A (116 NSF), Room 172B (119 NSF), Room 172C (2892 NSF), Room 172D (187 NSF), Room 173 (80 NSF), Room 174 (79 NSF), Room 175 (199 NSF), Room 176 (80 NSF), Room 177 (189 NSF), Room 178 (91 NSF), Room 179 (120 NSF), Room 180 (239 NSF), Room 181 (35 NSF), Room 182 (303 NSF), Room 183 (1438 NSF), Room 184 (1133 NSF), Room 184A (225 NSF), Room 185 (171 NSF), Room 185A (110 NSF), Room 186 (232 NSF), Room 187 (312 NSF), Room 188 (8544 NSF), Room 189 (49 NSF), Room 190 (178 NSF), Room 191 (179 NSF), Room 192 (48 NSF), Room 193 (91 NSF), Room 194 (71 NSF), Room 195 (71 NSF), Room 196 (133 NSF), Room 197 (1479 NSF), Room 198 (25 NSF), Room 199 (229 NSF), Room 200 (25 NSF), Room 201 (152 NSF), Room 202 (71 NSF), Room 203 (151 NSF), Room 204 (48 NSF), Room 205 (178 NSF), Room 206 (49 NSF), Room 207 (178 NSF), Room 208 (1480 NSF), Room 209 (161 NSF), Room 210 (1088 NSF), Room 210A (1405 NSF), Room 211 (107 NSF), Room 214 (40 NSF), Room 215 (764 NSF), Room 216 (755 NSF), Room 217 (764 NSF), Room 218 (1112 NSF), Room 219 (764 NSF), Room 220 (755 NSF), Room 221 (756 NSF), Room 222 (1115 NSF), Room 223 (302 NSF), Room 224 (158 NSF), Room 225 (124 NSF), Room 226 (19 NSF), Room 227 (1111 NSF), Room 228 (53 NSF), Room 900W (5540 NSF)				
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EDUCATIONAL PLANT FIVE YEAR SURVEY REPORT

District:

8-CHARLOTTE COUNTY SCHOOL DISTRICT

Survey:

Survey: 6 - Version: 1

Status:

Active Approved

EDUCATIONAL PLANT FIVE YEAR SURVEY REPORT

District: 8-CHARLOTTE COUNTY SCHOOL DISTRICT **Survey:** Survey: 6 - Version: 1 **Status:** Active Approved

District Name: CHARLOTTE COUNTY SCHOOL DISTRICT
Survey: Number 6 - Version 1
Facility Name: PORT CHARLOTTE SENIOR HIGH
Address: 18200 COCHRAN BLVD., PORT CHARLOTTE

	Existing	Recommended
Capital Outlay Classification	1 - SCHOOL RECOMMENDED FOR CONTINUED USE	1 - SCHOOL RECOMMENDED FOR CONTINUED USE
Facility Use	SENIOR HIGH	SENIOR HIGH
Low Grade	GRADE 9	GRADE 9
High Grade	GRADE 12	GRADE 12
Comments		

	Existing	Student Stations Added/Reduced(+ or -)	Recommended
Perm. Stations	1,937	0	1937
Reloc. Stations	0	0	0
Mod. Stations	0	0	0
Total Stations	1,937	0	1937
Utilization Factor	95%		95%
School Capacity	1,840		1840
COFTE Student Membership	1,434		1,300
Survey Annotation			

New Site Cost	Site Expansion	Site Development	Site Improvement	Remodeling Cost	Renovation Cost	New Construction Cost
\$0	\$0	\$0	\$0	\$0	\$0	\$0
			Estimated Total Project Cost		\$0	

PORT CHARLOTTE SENIOR HIGH	Parcel	Building	Description	Total NSF	Change In Station Count	Calculated Cost	Cost Per NSF	Cost Per Station

EDUCATIONAL PLANT FIVE YEAR SURVEY REPORT

District: 8-CHARLOTTE COUNTY SCHOOL DISTRICT **Survey:** Survey: 6 - Version: 1 **Status:** Active Approved

District Name: CHARLOTTE COUNTY SCHOOL DISTRICT
Survey: Number 6 - Version 1
Facility Name: PUNTA GORDA CENTER
Address: 1016 EDUCATION AVENUE, PUNTA GORDA

	Existing	Recommended
Capital Outlay Classification	6 - ANCILLARY RECOMMENDED FOR CONTINUED USE	6 - ANCILLARY RECOMMENDED FOR CONTINUED USE
Facility Use	MULTIPLE USE SUPPORT	MULTIPLE USE SUPPORT
Low Grade	DISTRICT SERVICES	DISTRICT SERVICES
High Grade	DISTRICT SERVICES	DISTRICT SERVICES
Comments		

	Existing	Student Stations Added/Reduced(+ or -)	Recommended
Perm. Stations	0	0	0
Reloc. Stations	0	0	0
Mod. Stations	0	0	0
Total Stations	0	0	0
Utilization Factor	0%		0%
School Capacity	0		0
COFTE Student Membership	0		0
Survey Annotation			

New Site Cost	Site Expansion	Site Development	Site Improvement	Remodeling Cost	Renovation Cost	New Construction Cost
\$0	\$0	\$0	\$0	\$0	\$0	\$0
			Estimated Total Project Cost		\$0	

PUNTA GORDA CENTER	Parcel	Building	Description	Total NSF	Change In Station Count	Calculated Cost	Cost Per NSF	Cost Per Station

EDUCATIONAL PLANT FIVE YEAR SURVEY REPORT

District:
8-CHARLOTTE COUNTY SCHOOL DISTRICT

Survey:
Survey: 6 - Version: 1

Status:
Active Approved

District Name: CHARLOTTE COUNTY SCHOOL DISTRICT

Survey: Number 6 - Version 1

Facility Name: PUNTA GORDA MIDDLE

Address: 1001 EDUCATION AVENUE, PUNTA GORDA

	Existing	Recommended
Capital Outlay Classification	1 - SCHOOL RECOMMENDED FOR CONTINUED USE	1 - SCHOOL RECOMMENDED FOR CONTINUED USE
Facility Use	MIDDLE	MIDDLE
Low Grade	GRADE 6	GRADE 6
High Grade	GRADE 8	GRADE 8
Comments		

	Existing	Student Stations Added/Reduced(+ or -)	Recommended
Perm. Stations	1,401	0	1401
Reloc. Stations	0	0	0
Mod. Stations	0	0	0
Total Stations	1,401	0	1401
Utilization Factor	90%		90%
School Capacity	1,260		1260
COFTE Student Membership	1,204		1,225
Survey Annotation			

New Site Cost	Site Expansion	Site Development	Site Improvement	Remodeling Cost	Renovation Cost	New Construction Cost
\$0	\$0	\$0	\$0	\$0	\$0	\$0
			Estimated Total Project Cost		\$0	

PUNTA GORDA MIDDLE	Parcel	Building	Description	Total NSF	Change In Station Count	Calculated Cost	Cost Per NSF	Cost Per Station

EDUCATIONAL PLANT FIVE YEAR SURVEY REPORT

District:

8-CHARLOTTE COUNTY SCHOOL DISTRICT

Survey:

Survey: 6 - Version: 1

Status:

Active Approved

District Name: CHARLOTTE COUNTY SCHOOL DISTRICT

Survey: Number 6 - Version 1

Facility Name: SALLIE JONES ELEMENTARY

Address: 1230 NARRANJA STREET, PUNTA GORDA

	Existing	Recommended
Capital Outlay Classification	1 - SCHOOL RECOMMENDED FOR CONTINUED USE	1 - SCHOOL RECOMMENDED FOR CONTINUED USE
Facility Use	ELEMENTARY	ELEMENTARY
Low Grade	PRE-K E S E	PRE-K E S E
High Grade	GRADE 5	GRADE 5
Comments		

	Existing	Student Stations Added/Reduced(+ or -)	Recommended
Perm. Stations	717	0	717
Reloc. Stations	0	0	0
Mod. Stations	0	0	0
Total Stations	717	0	717
Utilization Factor	100%		100%
School Capacity	717		717
COFTE Student Membership	668		670
Survey Annotation			

New Site Cost	Site Expansion	Site Development	Site Improvement	Remodeling Cost	Renovation Cost	New Construction Cost
\$0	\$0	\$0	\$0	\$0	\$0	\$0
			Estimated Total Project Cost		\$0	

SALLIE JONES ELEMENTARY	Parcel	Building	Description	Total NSF	Change In Station Count	Calculated Cost	Cost Per NSF	Cost Per Station

EDUCATIONAL PLANT FIVE YEAR SURVEY REPORT

District: 8-CHARLOTTE COUNTY SCHOOL DISTRICT **Survey:** Survey: 6 - Version: 1 **Status:** Active Approved

District Name: CHARLOTTE COUNTY SCHOOL DISTRICT
Survey: Number 6 - Version 1
Facility Name: THE ACADEMY
Address: 18300 Cochran Blvd, Port Charlotte

	Existing	Recommended
Capital Outlay Classification	1 - SCHOOL RECOMMENDED FOR CONTINUED USE	1 - SCHOOL RECOMMENDED FOR CONTINUED USE
Facility Use	COMBINATION	COMBINATION
Low Grade	GRADE 6	GRADE 6
High Grade	GRADE 12	GRADE 12
Comments		

	Existing	Student Stations Added/Reduced(+ or -)	Recommended
Perm. Stations	275	0	275
Reloc. Stations	0	0	0
Mod. Stations	0	0	0
Total Stations	275	0	275
Utilization Factor	90%		90%
School Capacity	247		247
COFTE Student Membership	191		168
Survey Annotation	Remove relocatable > 20 years old when funds permit.		

New Site Cost	Site Expansion	Site Development	Site Improvement	Remodeling Cost	Renovation Cost	New Construction Cost
\$0	\$0	\$0	\$0	\$10,000	\$0	\$0
			Estimated Total Project Cost		\$10,000	

THE ACADEMY	Parcel	Building	Description	Total NSF	Change In Station Count	Calculated Cost	Cost Per NSF	Cost Per Station
Remodeling 2023	37	99	Removed NSF (663), Added NSF (0), Difference NSF (663), Percent (100%), Removed Stations (0), Added Stations (0) Remodeling: Adding and Removing Room P086 (230 NSF), Room P086A (100 NSF), Room P086B (130 NSF), Room P086C (110 NSF), Room P086D (77 NSF), Room P086E (16 NSF)	-663	0	\$10,000	\$15	\$0

EDUCATIONAL PLANT FIVE YEAR SURVEY REPORT

District:

8-CHARLOTTE COUNTY SCHOOL DISTRICT

Survey:

Survey: 6 - Version: 1

Status:

Active Approved

EDUCATIONAL PLANT FIVE YEAR SURVEY REPORT

District:
8-CHARLOTTE COUNTY SCHOOL DISTRICT

Survey:
Survey: 6 - Version: 1

Status:
Active Approved

District Name: CHARLOTTE COUNTY SCHOOL DISTRICT
Survey: Number 6 - Version 1
Facility Name: VINELAND ELEMENTARY
Address: 467 BOUNDARY BOULEVARD, ROTONDA WEST

	Existing	Recommended
Capital Outlay Classification	1 - SCHOOL RECOMMENDED FOR CONTINUED USE	1 - SCHOOL RECOMMENDED FOR CONTINUED USE
Facility Use	ELEMENTARY	ELEMENTARY
Low Grade	PRE-K E S E	PRE-K E S E
High Grade	GRADE 5	GRADE 5
Comments		

	Existing	Student Stations Added/Reduced(+ or -)	Recommended
Perm. Stations	648	0	648
Reloc. Stations	232	-232	0
Mod. Stations	0	0	0
Total Stations	880	-232	648
Utilization Factor	100%		100%
School Capacity	880		648
COFTE Student Membership	600		601
Survey Annotation	Relocatables >20 years old to be removed. When the Survey was opened, there were relocatables at this site. However, they were destroyed by Hurricane Ian and have been removed.		

New Site Cost	Site Expansion	Site Development	Site Improvement	Remodeling Cost	Renovation Cost	New Construction Cost
\$0	\$0	\$0	\$0	\$120,000	\$0	\$0
			Estimated Total Project Cost		\$120,000	

EDUCATIONAL PLANT FIVE YEAR SURVEY REPORT

District:

Survey:

Status:

8-CHARLOTTE COUNTY SCHOOL DISTRICT

Survey: 6 - Version: 1

Active Approved

VINELAND ELEMENTARY	Parcel	Building	Description	Total NSF	Change In Station Count	Calculated Cost	Cost Per NSF	Cost Per Station
Remodeling 2028	15	99	Removed NSF (10608), Added NSF (0), Difference NSF (10608), Percent (100%), Removed Stations (232), Added Stations (0) Remodeling: Adding and Removing Room 100 (1488 NSF), Room 101 (668 NSF), Room 101A (49 NSF), Room 101B (43 NSF), Room 102 (668 NSF), Room 102A (49 NSF), Room 102B (43 NSF), Room 103 (668 NSF), Room 103A (49 NSF), Room 103B (43 NSF), Room 104 (668 NSF), Room 104A (49 NSF), Room 104B (43 NSF), Room 105 (668 NSF), Room 105A (49 NSF), Room 105B (43 NSF), Room 106 (668 NSF), Room 106A (49 NSF), Room 106B (43 NSF), Room 107 (668 NSF), Room 107A (49 NSF), Room 107B (43 NSF), Room 108 (668 NSF), Room 108A (49 NSF), Room 108B (43 NSF), Room 109 (668 NSF), Room 109A (49 NSF), Room 109B (43 NSF), Room 110 (668 NSF), Room 110A (49 NSF), Room 110B (43 NSF), Room 111 (668 NSF), Room 111A (49 NSF), Room 111B (43 NSF), Room 112 (668 NSF), Room 112A (49 NSF), Room 112B (43 NSF)	-10,608	-232	\$120,000	\$11	\$0

EDUCATIONAL PLANT FIVE YEAR SURVEY REPORT

District: 8-CHARLOTTE COUNTY SCHOOL DISTRICT **Survey:** Survey: 6 - Version: 1 **Status:** Active Approved

District Name: CHARLOTTE COUNTY SCHOOL DISTRICT
Survey: Number 6 - Version 1
Facility Name: WEST COUNTY TRANSPORTATION AND MAINTENANCE
Address: 255 COUGAR WAY, ROTONDA WEST

	Existing	Recommended
Capital Outlay Classification	6 - ANCILLARY RECOMMENDED FOR CONTINUED USE	6 - ANCILLARY RECOMMENDED FOR CONTINUED USE
Facility Use	TRANSPORTATION	TRANSPORTATION
Low Grade	DISTRICT SERVICES	DISTRICT SERVICES
High Grade	DISTRICT SERVICES	DISTRICT SERVICES
Comments		

	Existing	Student Stations Added/Reduced(+ or -)	Recommended
Perm. Stations	0	0	0
Reloc. Stations	0	0	0
Mod. Stations	0	0	0
Total Stations	0	0	0
Utilization Factor	0%		0%
School Capacity	0		0
COFTE Student Membership	0		0
Survey Annotation	Remove relocatable > 20 years old when funds permit.		

New Site Cost	Site Expansion	Site Development	Site Improvement	Remodeling Cost	Renovation Cost	New Construction Cost
\$0	\$0	\$0	\$0	\$10,000	\$0	\$0
			Estimated Total Project Cost		\$10,000	

WEST COUNTY TRANSPORTATION AND MAINTENANCE	Parcel	Building	Description	Total NSF	Change In Station Count	Calculated Cost	Cost Per NSF	Cost Per Station
Remodeling 2023	22	99	Removed NSF (1290), Added NSF (0), Difference NSF (1290), Percent (100%), Removed Stations (0), Added Stations (0) Remodeling: Adding and Removing Room 070 (120 NSF), Room 070A (24 NSF), Room 070B (209 NSF), Room 070C (897 NSF), Room 070E (40 NSF)	-1,290	0	\$10,000	\$8	\$0

EDUCATIONAL PLANT FIVE YEAR SURVEY REPORT

District:

8-CHARLOTTE COUNTY SCHOOL DISTRICT

Survey:

Survey: 6 - Version: 1

Status:

Active Approved

DISTRICTWIDE RECOMMENDATIONS

The following recommendations are made on a districtwide basis and include each school or facility where applicable.

1. Correct deficiencies relating to safety to life, health, and sanitation as identified in the comprehensive Safety Inspection Report pursuant to §4.4(1), §5(1), and §5(13), SREF 2014.
2. Necessary modifications for the physically disabled in existing buildings recommended for continued use as provided for in §255.21, F.S.
3. Additional, or replacement of, equipment for existing school buildings recommended for continued use as provided in §2.1(9)(e), SREF 2014.
4. Replacement of roofs at existing facilities as provided in §1.2(55) and §4.1(1)(c), SREF 2014.
5. Provide storage, custodial spaces, and sanitation facilities to serve students, staff, and the general public as provided in §6.1, SREF 2014, and §423.20, FBC.
6. Provide paved auto parking areas pursuant to §5.2(f)10, SREF 2014, and §423.10.2.7, FBC.
7. Purchase sites for educational and ancillary facilities for future use beyond the projection period of this survey pursuant to §1.4, SREF 2014.
8. Retrofit existing schools for technology, which may include the creation, or improvement of, cable distribution points (closets in telephone parlance). Provide “clean power” and convenient access to video, data, and voice signal wiring, the built-in equipment involved in distributing video, data, and voice signals pursuant to §5, SREF 2014. This recommendation does not include new construction, remodeling, or terminal equipment (workstations, terminals, receiving equipment, and similar items).

The cost estimates for these districtwide recommendations are not included in the section on Financing the Proposed Program.

EDUCATIONAL PLANT FIVE YEAR SURVEY REPORT

District:

8-CHARLOTTE COUNTY SCHOOL DISTRICT

Survey:

Survey: 6 - Version: 1

Status:

Active Approved

Section 4: COFTE

EDUCATIONAL PLANT FIVE YEAR SURVEY REPORT

District:

8-CHARLOTTE COUNTY SCHOOL DISTRICT

Survey:

Survey: 6 - Version: 1

Status:

Active Approved

ANALYSIS OF STUDENT POPULATIONS

Technique for Predicting COFTE Student Membership Trends

The projection of future student population change is based on empirical evidence of historical trends in the student population; annually, the Office of Economic and Demographic Research (EDR) prepares COFTE enrollment projections. The projections do not include summer school, regular pre-kindergarten, hospital/homebound, or area vocational school adults attending basic and high school classes. The projections are most accurate in counties where growth and migration occur at a reasonably constant and predictable rate and, conversely, are least accurate if major changes in the economy and development of the county occur during the projection period.

Even though the out-year COFTE projections used for a 5-year survey period may be less (or more) than the district anticipates, the annual recalculation of COFTE projections assures that current, accurate data can be inserted into a new survey to guarantee that the most reliable projections are used for facilities planning purposes.

EDUCATIONAL PLANT FIVE YEAR SURVEY REPORT

District:

8-CHARLOTTE COUNTY SCHOOL DISTRICT

Survey:

Survey: 6 - Version: 1

Status:

Active Approved

ORGANIZATION: 8-CHARLOTTE COUNTY SCHOOL DISTRICT

SURVEY: Number 6 - Version 1

HISTORY

Year	PK-3	4-8	9-12	PK-12
2023 - 2024	4,509	5,498	4,819	14,827

PROJECTED

Year	PK-3	4-8	9-12	PK-12
2027 - 2028	4,418	5,749	4,405	14,572

ANALYSIS OF CHANGE PROJECTED

PK-3	4-8	9-12	PK-12
-91	250	-414	-255

EDUCATIONAL PLANT FIVE YEAR SURVEY REPORT

District:

8-CHARLOTTE COUNTY SCHOOL DISTRICT

Survey:

Survey: 6 - Version: 1

Status:

Active Approved

Section 5: Student Membership

EDUCATIONAL PLANT FIVE YEAR SURVEY REPORT

District:

Survey:

Status:

8-CHARLOTTE COUNTY SCHOOL DISTRICT

Survey: 6 - Version: 1

Active Approved

FACILITY NAME	PK-3 Memb. Proj.	4-8 Memb. Proj.	9-12 Memb. Proj.	PK-3 Memb. In	4-8 Memb. In	9-12 Memb. In	PK-3 Memb. Out	4-8 Memb. Out	9-12 Memb. Out	PK-3 Memb. Reco.	4-8 Memb. Reco.	9-12 Memb. Reco.	Total COFTE	Exist. Satis. Stud. Stat.	Pos. Remo. Sta.	Neg. Remo. Sta.	New Const. Sta.	Total Sta.	Util. Factor	Reco. Capac.	Year-Round Capac.
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Elementary

BENJAMIN J BAKER	59	0	0	0	0	0	0	0	0	59	0	0	59	324	0	0	0	324	1.00	324	388
DEEP CREEK ELEMENTARY	544	268	0	0	0	0	0	0	0	544	268	0	812	884	0	0	0	884	1.00	884	1,060
EAST ELEMENTARY	460	210	0	0	0	0	0	0	0	460	210	0	670	861	0	0	0	861	1.00	861	1,033
KINGSWAY ELEMENTARY	402	200	0	0	0	0	0	0	0	402	200	0	602	732	0	0	0	732	1.00	732	878
LIBERTY ELEMENTARY	355	200	0	0	0	0	0	0	0	355	200	0	555	655	0	0	0	655	1.00	655	786
MEADOW PARK ELEMENTARY	454	260	0	0	0	0	0	0	0	454	260	0	714	865	0	0	0	865	1.00	865	1,038
MYAKKA RIVER ELEMENTARY	382	200	0	0	0	0	0	0	0	382	200	0	582	667	0	0	0	667	1.00	667	800
NEIL ARMSTRONG	490	230	0	0	0	0	0	0	0	490	230	0	720	861	0	0	0	861	1.00	861	1,033
PEACE RIVER ELEMENTARY	383	200	0	0	0	0	0	0	0	383	200	0	583	861	0	0	0	861	1.00	861	1,033
SALLIE JONES ELEMENTARY	460	210	0	0	0	0	0	0	0	460	210	0	670	717	0	0	0	717	1.00	717	860
VINELAND ELEMENTARY	406	195	0	0	0	0	0	0	0	406	195	0	601	880	0	-232	0	648	1.00	648	777

Middle & Junior High

L A ANGER MIDDLE	0	750	0	0	0	0	0	0	0	0	750	0	750	1,076	0	0	0	1,076	0.90	968	1,291
MURDOCK MIDDLE	0	650	0	0	0	0	0	0	0	0	650	0	650	954	0	0	0	954	0.90	858	1,144
PORT CHARLOTTE	0	875	0	0	0	0	0	0	0	0	875	0	875	1,166	0	-782	640	1,024	0.90	921	1,228
PUNTA GORDA MIDDLE	0	1,225	0	0	0	0	0	0	0	0	1,225	0	1,225	1,401	0	0	0	1,401	0.90	1,260	1,681

Senior High

CHARLOTTE SENIOR HIGH	0	0	1,680	0	0	0	0	0	0	0	0	1,680	1,680	1,853	0	0	0	1,853	0.95	1,760	2,223
LEMON BAY SENIOR HIGH	0	0	1,075	0	0	0	0	0	0	0	0	1,075	1,075	1,428	0	0	0	1,428	0.90	1,285	1,713
PORT CHARLOTTE	0	0	1,300	0	0	0	0	0	0	0	0	1,300	1,300	1,937	0	0	0	1,937	0.95	1,840	2,324

Combination

THE ACADEMY	0	28	140	0	0	0	0	0	0	0	28	140	168	275	0	0	0	275	0.90	247	330
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ESE/Alternative

CHARLOTTE HARBOR	23	47	35	0	0	0	0	0	0	23	47	35	105	262	30	-90	0	202	1.00	202	242
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EDUCATIONAL PLANT FIVE YEAR SURVEY REPORT

District:

Survey:

Status:

8-CHARLOTTE COUNTY SCHOOL DISTRICT

Survey: 6 - Version: 1

Active Approved

FACILITY NAME	PK-3 Memb. Proj.	4-8 Memb. Proj.	9-12 Memb. Proj.	PK-3 Memb. In	4-8 Memb. In	9-12 Memb. In	PK-3 Memb. Out	4-8 Memb. Out	9-12 Memb. Out	PK-3 Memb. Reco.	4-8 Memb. Reco.	9-12 Memb. Reco.	Total COFTE	Exist. Satis. Stud. Stat.	Pos. Remo. Sta.	Neg. Remo. Sta.	New Const. Sta.	Total Sta.	Util. Fact or	Reco. Capac.	Year- Round Capac.
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Vocational/Adult

CHARLOTTE TECHNICAL	0	0	175	0	0	0	0	0	0	0	0	0	175	175	789	0	0	0	789	1.20	946	946
------------------------	---	---	-----	---	---	---	---	---	---	---	---	---	-----	-----	-----	---	---	---	-----	------	-----	-----

Ancillary

MURDOCK CENTER	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0.00	0	0
MURDOCK TRANSPORTATI	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0.00	0	0
PUNTA GORDA CENTER	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0.00	0	0
WEST COUNTY TRANSPORTATI	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0.00	0	0

	4,418	5,748	4,405	0	0	0	0	0	0	4,418	5,748	4,405	14,571	19,448	30	-1,104	640	19,014		18,362	22,808
	out of	out of	out of																		
	4,418	5,748	4,405																		

EDUCATIONAL PLANT FIVE YEAR SURVEY REPORT

District:

8-CHARLOTTE COUNTY SCHOOL DISTRICT

Survey:

Survey: 6 - Version: 1

Status:

Active Approved

Section 6: Financial Summary

EDUCATIONAL PLANT FIVE YEAR SURVEY REPORT

District:

Survey:

Status:

8-CHARLOTTE COUNTY SCHOOL DISTRICT

Survey: 6 - Version: 1

Active Approved

Facility	Site Expansion Cost	Total Site Development Cost	Total Site Improvement Cost	Total Remodeling Cost	Total Renovation Cost	Total New Construction Cost	Overall Totals	Estimated Cost If Year Round School
Elementary								
BENJAMIN J BAKER ELEMENTARY	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0
DEEP CREEK ELEMENTARY	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0
EAST ELEMENTARY	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0
KINGSWAY ELEMENTARY	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0
LIBERTY ELEMENTARY	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0
MEADOW PARK ELEMENTARY	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0
MYAKKA RIVER ELEMENTARY	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0
NEIL ARMSTRONG ELEMENTARY	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0
PEACE RIVER ELEMENTARY	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0
SALLIE JONES ELEMENTARY	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0
VINELAND ELEMENTARY	\$0	\$0	\$0	\$120,000	\$0	\$0	\$120,000	

Middle & Junior High								
L A AINGER MIDDLE	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0
MURDOCK MIDDLE	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0
PORT CHARLOTTE MIDDLE	\$0	\$100,000	\$0	\$1,000,000	\$0	\$29,883,437	\$30,983,437	\$23,906,750
PUNTA GORDA MIDDLE	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0

Senior High								
CHARLOTTE SENIOR HIGH	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0
LEMON BAY SENIOR HIGH	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0
PORT CHARLOTTE SENIOR HIGH	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0

Combination								
THE ACADEMY	\$0	\$0	\$0	\$10,000	\$0	\$0	\$10,000	

ESE/Alternative								
CHARLOTTE HARBOR SCHOOL	\$0	\$0	\$0	\$1,153,248	\$0	\$0	\$1,153,248	

Vocational/Adult								
CHARLOTTE TECHNICAL COLLEGE	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0

EDUCATIONAL PLANT FIVE YEAR SURVEY REPORT

District:

Survey:

Status:

8-CHARLOTTE COUNTY SCHOOL DISTRICT

Survey: 6 - Version: 1

Active Approved

Facility	Site Expansion Cost	Total Site Development Cost	Total Site Improvement Cost	Total Remodeling Cost	Total Renovation Cost	Total New Construction Cost	Overall Totals	Estimated Cost If Year Round School
Ancillary								
MURDOCK CENTER	\$0	\$0	\$0	\$30,000	\$0	\$0	\$30,000	
MURDOCK TRANSPORTATION	\$0	\$0	\$0	\$0	\$0	\$0	\$0	
PUNTA GORDA CENTER	\$0	\$0	\$0	\$0	\$0	\$0	\$0	
WEST COUNTY TRANSPORTATION AND M	\$0	\$0	\$0	\$10,000	\$0	\$0	\$10,000	
Total	\$0	\$100,000	\$0	\$2,323,248	\$0	\$29,883,437	\$32,306,685	\$23,906,750

EDUCATIONAL PLANT FIVE YEAR SURVEY REPORT

District:

8-CHARLOTTE COUNTY SCHOOL DISTRICT

Survey:

Survey: 6 - Version: 1

Status:

Active Approved

EDUCATIONAL PLANT FIVE YEAR SURVEY REPORT

District:

8-CHARLOTTE COUNTY SCHOOL DISTRICT

Survey:

Survey: 6 - Version: 1

Status:

Active Approved

Section 7: Long Range Planning Summary

EDUCATIONAL PLANT FIVE YEAR SURVEY REPORT

District:

8-CHARLOTTE COUNTY SCHOOL DISTRICT

Survey:

Survey: 6 - Version: 1

Status:

Active Approved

Five Year Survey - Ten Year Capacity

CHARLOTTE COUNTY SCHOOL DISTRICT

6/7/2023

Schedule of capital outlay projects projected to ensure the availability of satisfactory student stations for the projected student enrollment in K - 12 programs for the future 5 years beyond the 5-year district facilities work program.

No items meet the criteria.

Five Year Survey - Ten Year Infrastructure

CHARLOTTE COUNTY SCHOOL DISTRICT

6/7/2023

Proposed Location of Planned New, Remodeled, or New Additions to Facilities in 6 thru 10 out years (Section 28).

No items meet the criteria.

Plans for closure of any school, including plans for disposition of the facility or usage of facility space, and anticipated revenues in the 6 thru 10 out years (Section 29).

No items meet the criteria.

EDUCATIONAL PLANT FIVE YEAR SURVEY REPORT

District:

8-CHARLOTTE COUNTY SCHOOL DISTRICT

Survey:

Survey: 6 - Version: 1

Status:

Active Approved

Five Year Survey - Ten Year Maintenance

CHARLOTTE COUNTY SCHOOL DISTRICT

6/7/2023

District projects and locations regarding the projected need for major renovation, repair, and maintenance projects within the district in years 6 - 10 beyond the projects plans detailed in the five years covered by the work plan.

No items match the criteria.

Five Year Survey - Ten Year Utilization

CHARLOTTE COUNTY SCHOOL DISTRICT

6/7/2023

Schedule of planned capital outlay projects identifying the standard grade groupings, capacities, and planned utilization rates of future educational facilities of the district for both permanent and relocatable facilities.

Grade Level Projections	FISH Student Stations	Actual FISH Capacity	Actual COFTE	Actual Utilization	Actual new Student Capacity to be added/removed	Projected COFTE	Projected Utilization
Elementary - District Totals	8,307	8,307	6,523.28	78.53 %	0	0	0.00 %
Middle - District Totals	4,872	4,382	3,578.93	81.67 %	0	0	0.00 %
High - District Totals	5,218	4,885	4,385.04	89.77 %	0	0	0.00 %
Other - ESE, etc	1,051	1,208	314.72	26.05 %	0	0	0.00 %
	19,448	18,782	14,801.97	78.81 %	0	0	0.00 %

Combination schools are included with the middle schools for student stations, capacity, COFTE and utilization purposes because these facilities all have a 90% utilization factor. Use this space to explain or define the grade groupings for combination schools.

No comments to report.

EDUCATIONAL PLANT FIVE YEAR SURVEY REPORT

District:

8-CHARLOTTE COUNTY SCHOOL DISTRICT

Survey:

Survey: 6 - Version: 1

Status:

Active Approved

Five Year Survey - Twenty Year Capacity

CHARLOTTE COUNTY SCHOOL DISTRICT

6/7/2023

Schedule of capital outlay projects projected to ensure the availability of satisfactory student stations for the projected student enrollment in K - 12 programs for the future 11 - 20 years beyond the 5-year district facilities work program.

No items match the criteria.

Five Year Survey - Twenty Year Infrastructure

CHARLOTTE COUNTY SCHOOL DISTRICT

6/7/2023

Proposed Location of Planned New, Remodeled, or New Additions to Facilities in the 11 through 20 out years (Section 28).

No items meet the criteria.

Plans for closure of any school, including plans for disposition of the facility or usage of facility space, and anticipated revenues in the 11 through 20 out years (Section 29).

No items meet the criteria.

EDUCATIONAL PLANT FIVE YEAR SURVEY REPORT

District:

8-CHARLOTTE COUNTY SCHOOL DISTRICT

Survey:

Survey: 6 - Version: 1

Status:

Active Approved

Five Year Survey - Twenty Year Maintenance

CHARLOTTE COUNTY SCHOOL DISTRICT

6/7/2023

District projects and locations regarding the projected need for major renovation, repair, and maintenance projects within the district in years 11 - 20 beyond the projects plans detailed in the five years covered by the work plan.

No items match the criteria.

Five Year Survey - Twenty Year Utilization

CHARLOTTE COUNTY SCHOOL DISTRICT

6/7/2023

Schedule of planned capital outlay projects identifying the standard grade groupings, capacities, and planned utilization rates of future educational facilities of the district for both permanent and relocatable facilities.

Grade Level Projections	FISH Student Stations	Actual FISH Capacity	Actual COFTE	Actual Utilization	Actual new Student Capacity to be added/removed	Projected COFTE	Projected Utilization
Elementary - District Totals	8,307	8,307	6,523.28	78.53 %	0	0	0.00 %
Middle - District Totals	4,872	4,382	3,578.93	81.67 %	0	0	0.00 %
High - District Totals	5,218	4,885	4,385.04	89.77 %	0	0	0.00 %
Other - ESE, etc	1,051	1,208	314.72	26.05 %	0	0	0.00 %
	19,448	18,782	14,801.97	78.81 %	0	0	0.00 %

Combination schools are included with the middle schools for student stations, capacity, COFTE and utilization purposes because these facilities all have a 90% utilization factor. Use this space to explain or define the grade groupings for combination schools.

No comments to report.

Appendix #4 - Charlotte County Interlocal Agreement for Coordination Planning and School Concurrency

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CHARLOTTE COUNTY CLERK OF CIRCUIT COURT
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Interlocal Agreement for Coordinated Planning and School Concurrency

May, 2016

Prepared By



**Charlotte County
City of Punta Gorda
School Board of Charlotte County**

46
MIN

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Acronyms

AICP	American Institute of Certified Planners
CIE	Capital Improvements Element
COC	Certificate of Concurrency
CSA	Concurrency Service Area
DEO	Department of Economic Opportunity
DRI	Development of Regional Impact
DRT	Development Review Table
FDOE	Florida Department of Education
FISH	Florida Inventory of School Houses
FTE	Full-Time Equivalent
ICE	Intergovernmental Coordination Element
LDR	Land Development Regulations
LOS	Level of Service
LPA	Local Planning Agency
PSFE	Public Schools Facilities Element
PSFPC	Public Schools Facility Planning Committee
SCADL	School Capacity Availability Determination Letter
SGR	Student Generation Rate
SIA	School Impact Analysis
SWG	Staff Working Group
ILA	Interlocal Agreement

INTERLOCAL AGREEMENT FOR PUBLIC SCHOOL FACILITY PLANNING AND SCHOOL CONCURRENCY

This Interlocal Agreement (hereinafter referred to as "Agreement") is entered into between the Charlotte County Board of County Commissioners (hereinafter referred to as "the County"), the City Council of the City of Punta Gorda (hereinafter referred to as "the City") (the County and the City may be referred to hereinafter, severally or jointly, as "the Local Governments," as indicated by context and application), and the School Board of Charlotte County (hereinafter referred to as "the School Board"). The County, the City and the School Board are hereinafter referred to collectively as the "Parties."

WHEREAS, the Parties recognize their mutual obligation and responsibility for the education, nurturing and general well-being of the children within their community; and

WHEREAS, the Parties are authorized to enter into this Agreement pursuant to Section 163.01, Section 163.3177(6)(h)(2) and (3) and Section 1013.33, Florida Statutes (F.S.); and

WHEREAS, the Parties recognize the benefits that will flow to the citizens and students of their communities by more closely coordinating their comprehensive land use and school facilities planning programs: namely (1) better coordination of new schools in time and place with land development, (2) greater efficiency for the School Board and Local Governments by reducing student travel times and placing 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 collocating schools with parks, ball fields, libraries, and other community facilities to take advantage of joint use opportunities, and (6) reduction of pressures contributing to urban sprawl and support of existing neighborhoods by appropriately locating new schools and expanding and renovating existing schools; and

WHEREAS, the Parties have determined that it is necessary and appropriate to cooperate with each other to provide adequate public school facilities in a timely manner and at appropriate locations, to eliminate any deficit of permanent student stations and to provide capacity for projected new growth; and

WHEREAS, Section 1013.33, F.S., requires that the location of public educational facilities must be consistent with the comprehensive plan and implementing land development regulations of the appropriate local governing body; and

WHEREAS, Section 163.3177(6)(h), F.S., requires each Local Government to adopt an intergovernmental coordination element as part of their comprehensive plan that states principles and guidelines to be used in the accomplishment of coordination of the adopted comprehensive

plan with the plans of the School Board, and describes the processes for collaborative planning and decision making on population projections and public school siting; and

WHEREAS, the Local Governments are entering into this Agreement in reliance on the School Board's obligation to prepare, adopt and implement a financially feasible capital facilities program to achieve public schools operating at the adopted level of service standard consistent with the timing specified in the School Board's 5-Year District Facilities Work Program and the School Board's further commitment to update and adopt the plan annually in coordination with the Local Governments; and

WHEREAS, the School Board, is entering into this Agreement in reliance on the Local Governments' policy to adopt amendments to their local comprehensive plans to maintain school concurrency; and

WHEREAS, the County has jurisdiction for land use and growth management decisions within its unincorporated boundaries, including the authority to approve or deny comprehensive plan amendments, rezonings, and other development orders that generate students and impact the public school system, and the City has similar jurisdiction within its boundaries; and

WHEREAS, the School Board has the statutory and constitutional responsibility to provide a uniform system of free and adequate public schools on a countywide basis; and

WHEREAS, the Parties enter into this Agreement in fulfillment of those statutory requirements and in recognition of the benefits accruing to their citizens and students described above as fully satisfying Sections 1013.33 and 163.31777 F.S., and 163.3180 F.S. requirements for cooperative planning for all Parties involved, both individually and collectively.

NOW THEREFORE, be it mutually agreed between the School Board of Charlotte County, the Board of County Commissioners of Charlotte County and the City Council of the City of Punta Gorda that the following procedures will be followed in coordinating land use and public school facilities planning and school concurrency:

Section 1. Recitals

The foregoing recitals are adopted and incorporated by reference as if set forth fully herein. The following definitions and procedures will be used to coordinate public facilities planning, land use planning and school concurrency:

Section 2. Definitions

Adjacent Concurrency Service Areas (Adjacent CSA): Concurrency Service Areas which are contiguous and touch along one side of their outside geographic boundary.

Ancillary Facilities: The building, site and site improvements necessary to provide support services to a School Board's educational program including, but not limited to, vehicle storage, maintenance, warehouses, or administrative buildings.

Applicant: For the purposes of school concurrency, any person or entity undertaking a residential development.

Attendance Boundary: The geographic area which is established to identify the public school assignment of students residing within that area.

Available Capacity: Existing school capacity which is available within a Concurrency Service Area including any new school capacity that will be in place or under actual construction.

Certificate of Concurrency (COC): A final local development order or certificate issued at final site plan or final plat approval, which has verified public facility capacity is available to service a development.

Charter School: An alternative public school authorized pursuant to Section 1002.33, F.S. and built to meet the State Requirements for Educational Facilities standards when used as a Proportionate Share Mitigation Option.

Class Size Reduction: As provided in Article IX, Section 1, of the Florida Constitution, as amended, a provision to ensure that after the 2010 school year there are a sufficient number of classrooms in a public school so that:

1. The maximum number of students who are assigned to each core teacher who is teaching in public school classrooms for pre-kindergarten through grade 3 does not exceed 18 students; and
2. The maximum number of students who are assigned to each core teacher who is teaching in public school classrooms for grades 4 through 8 does not exceed 22 students; and
3. The maximum number of students who are assigned to each core teacher who is teaching in public school classrooms for grades 9 through 12 does not exceed 25 students.

Comprehensive Plan: As provided by Section 163.3164(4), F.S., as amended, a plan that meets the requirements of Chapter 163, F.S.

Concurrency: As agreed to by the Parties, the necessary public facilities and services to maintain the adopted level of service standards are available when the impacts of development occur.

Concurrency Service Area (CSA): A geographic area in which the level of service for a school of each type is measured when an application for residential development is reviewed for school concurrency purposes.

Consistency: As provided by Section 163.3194, F.S.

Core Facilities: The areas within an educational facility that are used to support the classrooms. These spaces include, but are not limited to: the media center, cafeteria, gymnasium, multi-purpose space, and administration.

Developer: As provided by Section 163.3164(13) F.S., as amended.

Development: As provided by Sections 163.3164(14) and 380.04, F.S., as amended.

Development Order: As provided by Section 163.3164(15), F.S., as amended.

Development Permit: As provided by Section 163.3164(16), F.S.

Development Review Table: A table used by the School Board to compare the projected students from proposed residential developments to the CSAs available capacity.

Educational Facility: The buildings and equipment, structures and special educational use areas that are built, installed, or established to serve educational purposes.

Educational Plant Survey: A systematic study of schools conducted at least every five years and submitted to the FDOE for review and validation. The survey includes an inventory of existing educational and ancillary plants, and recommendations for future needs.

Florida Inventory of School Houses (FISH) – Permanent Capacity: The report of the permanent capacity of existing public school facilities. The FISH capacity is the number of students that may be housed in a facility (school) at any given time based on a percentage of the total number of existing student stations and a designated size for each program.

Full-Time Equivalent (FTE) Student Count – Fall Semester: A fall semester count of all “full-time equivalent” students, pursuant to Section 1011.62, F.S.

Governing Body: The Board of County Commissioners of Charlotte County, the City Council of Punta Gorda, or any other chief governing body of a unit of local government, however designated, or any combination of such bodies as provided by Section 163.3164(20) F.S.

Governmental Agency: As provided by Section 163.3164 (21), F.S.

Level of Service (LOS) Standard: An indicator of the extent or degree of service provided by, or proposed to be provided by, a facility based on and related to the operational characteristics of the facility.

Local Government: Charlotte County and/or the Cities located within its boundary pursuant to Section 163.3164 (29), F.S.

Maximum School Utilization: The use of student capacity in each CSA to the greatest extent possible, based on the adopted level of service and the total number of permanent student stations according to the FISH, taking into account special considerations such as, core capacity, special programs, transportation costs, geographic impediments, court ordered desegregation, and class size reduction requirements to prevent disparate enrollment levels between schools of the same type (elementary, middle, high) and provide an equitable distribution of student enrollment district-wide.

Permanent Classroom: An area within a school that is not moveable and that provides instructional space for the maximum number of students who are assigned to a teacher, based on FDOE standards.

Permanent Student Station: The floor area in a permanent classroom required to house a student in an instructional program, as determined by the FDOE.

Program Capacity: The capacity of a school once the space needs are met for programs including, but not limited to, English Language Learner (ELL), programs for students with disabilities and programs for gifted students have been addressed.

Proportionate Share Mitigation: An Applicant improvement or contribution identified in a binding and enforceable agreement between the Applicant, the School Board and the Local Government with jurisdiction over the approval of the site plan, subdivision plan, plat or functional equivalent providing compensation for the additional demand on public school facilities caused by the residential development of the property.

Proposed New Residential Development: Any application for new residential development, or any amendment to a previously approved residential development which could result in student population impacts.

Residential Development: Any development that is comprised of dwelling units, in whole or in part, for human habitation.

School Board: The governing body of the School District, a political subdivision of the State of Florida and a body corporate pursuant to Section 1001.40, F.S.

School District of Charlotte County: The School District created and existing pursuant to Section 4, Article IX of the State of Florida Constitution.

School Capacity Availability Determination Letter (SCADL): Based upon a School Impact Analysis (SIA), a letter prepared by School Board staff, identifying if school capacity is available to serve a residential project, if capacity exists for each school type, and whether the proposed development is conceptually approved or vested.

School Board's 5-Year District Facilities Work Program: School Board's annual comprehensive capital planning document, that includes long range planning for facility needs over a five-year, ten-year and twenty-year planning horizon. The adopted School Board's 5-Year District Facilities Work Program and Capital Budget as authorized by Section 1013.35 F.S.

School Impact Analysis (SIA): A detailed report which evaluates a development plan for a proposed residential development and identifies the anticipated student impact from the development on the level of service standard within the Concurrency Service Area for each school type.

Significant Renovation: For purposes of this Agreement, "significant renovations" or "significant renovations to existing schools" shall mean (a) constructing an addition to the facility, or (b) the facility's replacement with a new facility, or (c) such other renovation which may affect public infrastructure such as roads, drainage or park land.

Student Generation Rate (SGR): A rate used to calculate the number of students by school type (elementary, middle, high) that can be anticipated from a new residential development.

Temporary Classroom: A movable classroom facility, not considered permanent capacity by the School Board, including but not limited to portable classrooms.

Temporary FISH Capacity: The temporary capacity at an existing public school facility based on the number of students that may be housed in temporary classrooms at the school facility.

Total FISH Capacity: The combination of temporary and permanent capacity at an existing public school facility.

Type of School: Schools providing the same level of education, i.e. elementary, middle, high school, or other combination of grade levels.

Utilization: A ratio showing the comparison of the total number of students for each school type enrolled to the overall capacity of a public school facility within a Concurrency Service Area (CSA).

Section 3. Joint Workshop Meetings

- 3.1 **Staff Working Group (SWG).** A staff working group consisting of representatives from the staffs of the County, the School Board, and the City will meet as needed, but no less often than annually, to discuss issues and formulate recommendations regarding coordination of land use and school facilities planning, including such issues as population and student projections, development trends, school needs, collocation and joint use opportunities, and ancillary infrastructure improvements needed to support the school and ensure safe student access. The SWG will prepare any information for presentation for the joint workshop sessions referred to in Section 3.2. The SWG will be responsible for setting the dates of the SWG meetings and for setting the dates of the joint workshop sessions.
- 3.2 **Meeting of Elected Officials.** One or more members of the governing bodies of the County, the School Board and the City will meet as needed, but no less often than annually, in a joint workshop session. These joint workshop sessions will be opportunities for the County, the City, and the School Board to hear reports, 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 presentation of the above information will be prepared by the SWG. If necessary, at the end of a joint workshop session, the County, the School Board and the City will set the date(s) for any additional joint workshop sessions.

Section 4. Student Enrollment and Population Projections

- 4.1 **Projection Coordination.** In fulfillment of their respective planning duties, the County, the City, and the School Board agree to coordinate and base their plans upon consistent projections of the amount, type, and distribution of population growth and student enrollment. Countywide five-year population and student enrollment projections shall be revised annually and provided to the SWG.
- 4.2 **Student Enrollment Projections.** The School Board shall utilize student population projections based on information produced by the demographic, revenue, and education estimating conferences pursuant to Section 216.136, F.S., where available, as modified by the School Board based on development data and agreement with the local governments and the Office of Educational Facilities. The School Board may request adjustment to the estimating conference projections to reflect actual enrollment and development trends. In formulating such a request, the School Board will coordinate with the City and County regarding development trends and future population projections.
- 4.3 **Student Enrollment Allocation.** The School Board, working with the County and the City, will use the information described in Section 5.3 of this Agreement to allocate projected student enrollment by grade level and school/facility so that the district-wide projections are not exceeded. The County and the City agree that the School Board shall have the authority to determine the school district attendance boundary lines based on the

assessment of student population. The allocation of projected student enrollment will be presented by the School Board to the SWG.

Section 5. Coordinating and Sharing of Information

5.1 The School Board's 5-Year District Facilities Work Program. On or before September 1st of each year, the School Board staff shall submit to the representatives of the SWG from the County and the City a draft of the Tentative School Board's 5-Year District Facilities Work Program or an addendum of the previous plan prior to adoption by the School Board. The plan will be consistent with the requirements of Section 1013.35, F.S., and will include projected geographically apportioned student populations, an inventory of existing school facilities, projections of facility space needs, information on relocatables/portables, general locations of new schools for the five-year, ten-year, and twenty-year time periods, and options to reduce the need for additional permanent student stations. The plan will also include a financially feasible School Board 5-Year District Facilities Work Program. The City and the County staff shall review the plan and comment to the School Board staff within fifteen (15) days on the consistency of the plan with the local government comprehensive plan, whether a comprehensive plan amendment will be necessary for any proposed educational facility, and whether the local government supports a necessary comprehensive plan amendment. If the local government does not support a comprehensive plan amendment, the matter shall be resolved pursuant to Section 8 of this agreement.

5.2 Educational Plant Survey. The Educational Plant Survey update will be completed every five years, and a copy will be provided to the SWG within ten (10) days after receipt of such update by the School Board staff. The Educational Plant Survey shall be consistent with the requirements of Section 1013.31, F.S., and include at least an inventory of existing educational facilities, recommendations for new and existing facilities, and the general location of each in coordination with the land use plan.

The SWG shall review the Educational Plant Survey update and provide comments as necessary to the School Board staff within ten (10) days after receipt of such update. The SWG shall also provide comments as necessary to the School Board regarding the preparation of the next Educational Plant Survey update to assist the School Board in the preparation of that update.

5.3 Growth and Development Trends. On or before March 1st of each year, the SWG representatives from the County and the City each will provide the School Board SWG representatives with a report on growth and development trends within their respective jurisdictions. These reports will include the following:

- a. The type, number, and location of residential units which have received final site plan approval;
- b. Information regarding future land use map amendments which may have an impact on school facilities;

- c. All building or development permits issued for the preceding year that may affect student population and their location. This information will identify the various categories of building or development permits and the total number of permits issued in each category during the preceding year. Additionally, this information may be a GIS-generated map of the County/City showing location of issued building or development permits; or a “scattergram” whenever such graphic can be generated by County/City staff;
- d. Information regarding the conversion or redevelopment of housing or other structures into residential units which are likely to generate new students; and
- e. The identification of any development orders issued, which contain a requirement for the provision of a school site as a condition of development approval.

Section 6. School Site Selection, Significant Renovations to Existing Schools, Replacements, and Potential School Closures

- 6.1 Public Schools Facility Planning Committee (PSFPC). The School Board will establish a Public Schools Facility Planning Committee for the purpose of reviewing potential sites for new schools and proposals for significant renovation and potential closure of existing schools. Based on information gathered during the review, the PSFPC will submit recommendations to the Superintendent for the School Board. The PSFPC will be a standing committee and will meet on an as needed basis; it is understood membership of this committee will fluctuate. In addition to appropriate members of the School Board, the PSFPC will include at least one staff member representative appointed by the County and at least one staff member representative appointed by the City.
- 6.2 School Site Selection and School Remodeling. When the need for a new school is identified in the School Board’s 5-Year District Facilities Work Program, the PSFPC will review potential site(s) in the area of need. The potential site(s) for new school(s), and the list of schools identified in the School Board’s 5-Year District Facilities Work Program for replacement, significant renovation, or potential closure will be submitted to the local government with jurisdiction for an informal assessment regarding consistency with the local government comprehensive plan. The assessment will include, as applicable, environmental suitability, transportation and pedestrian access, availability of infrastructure and services, safety concerns, land use compatibility, consistency with community vision, and other relevant issues. In addition, the issues identified in Section 6.4 of this agreement will be considered by both the local government and PSFPC as each site or school is evaluated. Based on the information gathered during this review, the PSFPC will make a recommendation to the Superintendent for the School Board or designee, of one or more sites for new schools in order of preference. The PSFPC will also make recommendations to the Superintendent or designee of one or more sites recommended for replacement, significant renovation, or potential closure.

- 6.3 Location of Potential School Sites. A list of potential school sites shall be developed pursuant to Section 6.2 of this Agreement. A map which identifies the location of the potential school sites shall be created and updated annually. Additions to the list shall be discussed by the SWG, and presented at the joint workshop sessions as referred to in Section 3.2 of this Agreement.
- 6.4 School Site Review Process. The following issues will be considered by the PSFPC, the School Board, and the local government with jurisdiction when evaluating new school sites, significant renovations of existing schools, replacements and potential closures of existing schools:
- a. The selection of schools proximate to urban residential development and contiguous to existing school sites, and which provide logical focal points for community activities and serve as the cornerstone for innovative urban design, including opportunities for shared use and collocation with other community facilities;
 - b. The location of elementary schools proximate to and within walking distance of the residential neighborhoods served;
 - c. The location of high schools on the periphery of residential neighborhoods, with access to major roads;
 - d. Compatibility of the school site with present and projected uses of adjacent property;
 - e. Whether existing schools can be expanded or renovated to support community redevelopment and revitalization, efficient use of existing infrastructure, and the discouragement of urban sprawl;
 - f. Site acquisition and development costs;
 - g. Safe access to and from the school site by pedestrians and vehicles;
 - h. Existing or planned availability of adequate public facilities and services to support the school;
 - i. Environmental constraints that would either preclude, or render new development or significant renovation of a public school on the site cost prohibitive;
 - j. Adverse impacts on archaeological or historic sites listed in the National Register of Historic Places or designated by the affected local government as a locally significant historic or archaeological resource;
 - k. A well-drained site and soils suitable for development or are adaptable for development and outdoor educational purposes with drainage improvements;

- l. No conflict with the proposed location, the local government comprehensive plan(s), stormwater management plans, or watershed management plans;
 - m. The proposed location not within a velocity flood zone, a floodway, or the Coastal High Hazard Area, as delineated in the applicable comprehensive plan(s);
 - n. The proposed site accommodates the required parking, circulation and queuing of vehicles;
 - o. The proposed location lies outside the area regulated by Section 333.03, F.S., regarding the construction of public educational facilities in the vicinity of an airport; and
 - p. Any additional concerns regarding safety of the site and its suitability to be utilized as a school.
- 6.5 Timing. At least sixty (60) days prior to acquiring or leasing property that may be used for a new public educational facility, the School Board staff shall provide written notice to the local government with jurisdiction over the use of the land. The local government, upon receipt of this notice, shall notify the School Board within forty-five (45) days if the proposed new school site is consistent with the land use categories and policies of the local government's comprehensive plan. This preliminary notice does not constitute the local government's determination of consistency pursuant to Section 1013.33(6), F.S.
- 6.6 Consistency. In accordance with Section 1013.33(6), F.S., if a school site is consistent with the future land use policies and land use category that allow public schools, the local government may not deny the site plan application but may impose reasonable development standards and conditions in accordance with Chapter 1013, F.S. The local government may consider the adequacy of the site plan as it relates to environmental concerns, health, safety and welfare, and effects on adjacent property.
- 6.7 Existing School Board Property. The parties to this Agreement recognize that the School Board has purchased various properties for specific uses prior to the effective date of this Agreement. The School Board has sought special exceptions or other review by the City or County as appropriate in each case. Properties purchased by the School Board prior to this Agreement shall not be subject to review under this Agreement but the School Board shall notify the respective local government when a development schedule is prepared so that infrastructure and joint use needs can be coordinated.

Section 7. Supporting Infrastructure

- 7.1 On-Site and Off-Site Infrastructure Improvements. In accordance with Sections 1013.33(3)(d) and 163.31777(2)(d) F.S., the School Board and affected Local Governments will jointly determine the need for and timing of on-site and off-site improvements necessary to support a new school or changes to an existing school facility that may affect public

infrastructure. The School Board and the Local Governments agree that the primary responsibility for constructing, operating and maintaining required infrastructure improvements shall be divided as follows:

- a. The School Board is responsible for
 1. On-site infrastructure improvements necessary to support the school;
 2. Right-of-way dedications necessary to accommodate off-site infrastructure (turn lanes, sidewalks, etc.) adjacent to the school property; and
 3. Extension of water and sewer lines required to serve the educational or ancillary facility. This provision is not intended to require the School Board to dedicate property or pay for improvements or construction of facilities of a general district-wide or regional nature which exceeds the School Board's proportionate share of the cost. By virtue of this subsection, the School Board is not waiving any local governmental responsibility for reimbursement per Chapter 1013, F.S.

- b. The Local Government is responsible for
 1. Acceleration/deceleration/by-pass lanes on roads contiguous to the school site;
 2. School cross-walk pavement striping;
 3. School zone flashing lights;
 4. Traffic signals that are required on public roads;
 5. Sidewalks needed within the two mile walk zone of a school;
 6. Reduced speed limit zones and signage; and
 7. Fire hydrant main extension.

7.2 Expenditure of Funds. The Parties and other governmental agencies and boards of the state may expend funds, separately or collectively, by contract or agreement, for the placement, paving, or maintaining of any road, byway, or sidewalk if the road, byway, or sidewalk is contiguous to or runs through the property of any educational plant, or for the maintenance or improvement of the property of any educational plant or of any facility on such property. Expenditures may also be made for sanitary sewer, water, stormwater, and utility improvements upon, or contiguous to, any existing or proposed educational plant.

7.3 Proportionate Share. In accordance with 1013.51(1)(b)F.S., the School Board may pay its proportionate share of the cost of on-site and off-site system improvements necessitated by the educational facility development, but the School District is not required to pay for or install any improvements that exceed those required to meet the on-

site and off-site needs of a new public educational facility or an expanded site, nor address existing facility or service backlogs or deficits.

Section 8. Local Planning Agency, Comprehensive Plan Amendments, Rezonings, and Developments of Regional Impact that Increase Residential Density and Community Development Projects

- 8.1 School Board Representation on the Local Planning Agency. The County and the City will each appoint a nonvoting representative nominated by the School Board on their respective Local Planning Agencies (LPA), to attend those meetings at which the respective LPA considers an application for a comprehensive plan amendment or rezoning or Development of Regional Impact (DRI) that would, if approved, increase residential density on the property that is the subject of the application. The City and the County may, in their separate discretion, grant voting status to the School Board member of their respective LPA. Nothing shall preclude the School Board member of an LPA from requesting attendance of additional School Board staff members at a particular LPA meeting when specialized opinions are needed to comment on any application.
- 8.2 School Board Representative Appointment. The School Board will appoint a representative or representatives to review and provide comments to the County for use in its staff reports for any application for comprehensive plan amendment, rezoning, or DRI, if any of such applications could have an impact on student enrollment, enrollment projections, or school facilities. The School Board will appoint a representative or representatives to review and provide comments to the City for use in its staff reports for any application for comprehensive plan amendment or rezoning, if any of such applications could have an impact on student enrollment, enrollment projections, or school facilities.
- 8.3 Notification of Potential Impacts. The County and the City agree to give the School Board notification of any plan amendment, rezoning or DRI application pending before them or their respective LPA that may affect student enrollment, enrollment projections, or school facilities. Such notice will be sent to the School Board staff at the same time the application is distributed to the applicable local government staff for comment, which in any case shall be at least thirty (30) days prior to the presentation of the application to the applicable LPA for a recommendation to the applicable local government governing body for decision. This notice requirement applies to applications for amendments to the applicable local government comprehensive plan, the applicable local government comprehensive plan's future land use map, rezonings, and developments of regional impact. The School Board staff shall provide written comments back to the County or the City staff, whichever is applicable, to be attached to the applicable staff report.
- 8.4 School Board Response. After notification by the Local Government, and prior to application approval, the School Board staff shall advise the Local Government of the school enrollment impacts anticipated to result from the proposed comprehensive plan amendment, rezoning or DRI, and whether sufficient capacity exists or is planned. Comments must be received by the City or County staff at least twenty (20) days prior to

the presentation of the application to the applicable LPA for recommendation to the applicable local government governing body for decision.

- 8.5 Insufficient Capacity. Based on the adopted level of service standard for schools, if sufficient school capacity is not available or planned to serve a development at the time of impact, the School Board staff shall advise the applicable Local Government of the capacity deficiencies.

If sufficient capacity is not available or planned to serve the development at the projected time of impact, the Local Government shall advise the developer that the School Board staff has identified there may be insufficient capacity to serve the development at the time of projected impact. The Local Government shall then advise the developer that they may choose to explore with the School Board and Local Government to provide mitigation for the anticipated impact at the time of review of the final site plan, final plat, or the functional equivalent.

If the developer chooses to utilize the options identified in Section 11.5 of this Agreement, the developer shall enter into an enforceable and binding agreement with the School Board and Local Government. It is required that an enforceable and binding agreement be executed by the School Board prior to the Local Government's public hearing for approval of the final site plan, final plat, or the functional equivalent. When the agreement is approved by the School Board, the agreement will then be presented for approval to the Local Government at the public hearing for the final site plan, final plat, or the functional equivalent.

If the developer chooses not to utilize this option, the developer shall acknowledge in writing to the School Board that they understand that they shall be required to address those anticipated deficits prior to final site plan, final plat or the functional equivalent.

The review by the School Board staff regarding comprehensive plan amendments, rezonings and DRIs containing residential units shall be classified as a Planning Level Review. The Planning Level Review does not constitute school concurrency review. This Section shall not be construed to obligate a Local Government to deny an application should the School Board fail to identify options to meet anticipated demand or should the collaborative process described in this Section fail to yield a means to ensure sufficient capacity.

- 8.6 Review Criteria. In reviewing and making decisions regarding applications for comprehensive plan amendments, rezonings, and DRIs the County and the City will consider the following issues:
- a. School Board staff comments on:

1. Available school capacity or planned improvements to increase school capacity;
 2. The provision of school sites and facilities within planned neighborhoods;
 3. The inclusion of school bus stops and turnarounds; and
 4. Compatibility of land uses adjacent to existing schools and reserved school sites;
- b. The collocation of parks, recreation and neighborhood facilities with school sites;
 - c. The linkage of schools, parks, libraries and other public facilities with bikeways, trails, and sidewalks for safe access;
 - d. Traffic circulation plans, which serve schools and the surrounding neighborhood; and
 - e. The provision of off-site signalization, signage, access improvements, and sidewalks to serve schools.

8.7 Community Development. In formulating community development plans and programs, the County and the City will consider the following issues:

- a. Giving priority to scheduling capital improvements that are coordinated with and meet the capital needs identified in the School Board's 5-Year District Facilities Work Program;
- b. Providing incentives to the private sector to identify and implement creative solutions to developing adequate school facilities for residential developments;
- c. Targeting community development improvements in older and distressed neighborhoods near schools; and
- d. Working to address and resolve multi-jurisdictional public school issues.

Section 9. Collocation and Shared Use

9.1 Collocation and Shared Use. Collocation and shared use of facilities are important to the School Board, the City and the County. During planning and design of construction, the School Board will look for opportunities to collocate and share use of school facilities and civic facilities when preparing the School Board's 5-Year District Facilities Work Program. Likewise, collocation and shared use opportunities will be considered by the City and the County when preparing updates to their respective comprehensive plans' schedule of capital improvements and when planning and designing new, or renovating

existing, community facilities. For example, opportunities for collocation and shared use with public schools will be considered for libraries, parks, recreation facilities, community centers, auditoriums, learning centers, museums, performing arts centers, pools, stadiums, and other similar facilities. In addition, collocation and shared use of school and governmental facilities for health care and social services will be considered.

- 9.2 Collocation and Shared Use Agreements. Separate agreements between the School Board and the City and between the School Board and the County will be developed to address issues of collocation and shared use of facilities which address legal liability, operating and maintenance costs, scheduling of use, and facility supervision or any other issues that may arise from collocation or shared use.

Section 10. Requirements for the School Concurrency Program

- 10.1 School Concurrency Established. This Agreement establishes a Public School Concurrency program consistent with the requirements of Sections 163.3177, 163.31777 and 163.3180, F.S.

- a. The Parties agree that the timely delivery of adequate public school facilities at adopted levels of service standards requires close coordination among the Parties at the level of land use planning, development approval, and school facility planning. Further, the Parties agree that new school facilities should be planned for and provided proximate to those areas planned for residential development or redevelopment. Further, School Board staff shall review and provide a determination on all residential applications for final site plan approval, subdivision approval, plat approval or the functional equivalent which will have an impact on school capacity and the School Board's 5-Year District Facilities Work Program.
- b. The Parties agree that approval of residential final site plans, subdivision plans, plats or the functional equivalent may be issued only if school capacity within a CSA is available in public school facilities at the level of service standard (LOS) specified in this Agreement, or if an Applicant chooses to mitigate for its impacts through a proportionate share payment in accordance with Section 11.5 of this Agreement.
- c. The Applicant shall provide a School Impact Analysis (SIA) form to the School District for a determination of whether school capacity is available to serve the residential development at the adopted LOS. This determination shall be in the form of a School Capacity Availability Determination Letter (SCADL) and based upon the criteria established in the applicable Local Government's Public School Facilities Element (PSFE).

- 10.2 Level of Service (LOS) Standard. To ensure the capacity of schools is sufficient to support student growth in the community, the Parties shall adopt LOS standards based on Total FISH Capacity (Total FISH Capacity = Permanent FISH Capacity + Temporary FISH Capacity) by school type. The Parties hereby agree that the adopted

LOS standard shall be 100% of total FISH capacity for high schools, 100% of total FISH capacity for middle schools, and 95% of total FISH capacity, which includes program capacity for elementary schools.

- a. Temporary classrooms shall not be accepted as a means of proportionate share mitigation. It is the policy of the School Board to reduce the number of relocatable classrooms over time until they are no longer needed. Public school facilities which achieve the adopted LOS should, to the greatest extent possible, discontinue the use of temporary classrooms, except when used as an operational solution.
- b. Temporary classrooms may be used as an operational solution during replacement, renovation, remodeling or expansion of a public school facility. In the event of a disaster or emergency, temporary classrooms may be used to satisfy the need for additional student stations.

10.3 Concurrency Service Area (CSA) Boundaries. The Parties hereby agree that the LOS standard for each school type shall be measured and applied using geographic areas known as a CSA. The mapping of the CSAs by school type shall be included in the data and analysis of the PSFE and are provided for information purposes only in Appendix A of this Agreement.

- a. The Local Governments shall adopt the standards for modification of the CSA boundary maps as defined here into the PSFE of their Comprehensive Plan.
 1. The Parties shall apply school concurrency on a less than district-wide basis, using individual school boundaries or a combination thereof to establish CSAs.
 2. Specialized schools shall not be included in the CSAs identified above for the purposes of school concurrency. Specialized schools are open to students residing within the district and students are generally accepted through application approval. These special public schools vary in size, and may target a specific type of student and can limit the age groups or grade levels.
- b. Any Party may propose a change to the CSA boundaries. Prior to adopting any change, the School Board must verify the following that as a result of the change:
 1. The adopted LOS standards will be achieved and maintained by the end of the School Board's 5-Year District Facilities Work Program planning period; and
 2. The utilization of school capacity will be maximized to the greatest extent possible, taking into account transportation costs and other relevant factors.

- c. The Parties shall observe the following process for modifying CSA boundary maps:
 - 1. The School Board, in coordination with Local Governments shall review the proposed CSA boundaries and the data and analysis used to support the changes, and determine whether or not a change is appropriate considering the above standards.
 - 2. If the proposed changes to the CSA boundaries are acceptable, the School Board shall transmit the changes with the supporting data and analysis to the Local Governments for review and comment. Comments from the Local Governments must be provided within forty-five (45) days of receipt.
 - 3. The change to a CSA boundary shall become effective upon final approval of the new CSA boundary map by the School Board. New CSA boundary maps shall also be included as data and analysis in support of the Local Governments' PSFE.

10.4 Specific Responsibilities of the School Board. By entering into this Agreement, the School Board agrees to do the following subject to the provision that none of the following shall exceed the requirements of the Florida Statutes:

- a. Prepare and annually update, in coordination with Local Governments, the financially feasible School Board's 5-Year District Facilities Work Program containing enough capacity each year to meet the demand for student stations identified by the population projections so that no CSA exceeds the adopted LOS standard.
- b. Maximize utilization of school capacity in order to ensure that all the schools of each type (elementary, middle, high) in each CSA operate at or below the adopted level of service standard for the school type, consistent with the requirements of this Agreement.
- c. Construct the capacity enhancing and modernization projects which, when completed, will add sufficient capacity to achieve and maintain the adopted LOS standard for all CSAs based on the projected enrollment; provide for required modernizations; and satisfy the School Board's constitutional obligation to provide a uniform system of free public schools on a county-wide basis.
- d. Consider utilizing charter schools built in conformance with School Board standards and with Section 423 of Florida Building Code [State Requirements for Educational Facilities (SREF)], to the extent the enrollment can be controlled by the School Board, to expand capacity of the public school system and mitigate the educational impact created by the development of new residential dwelling units.
- e. Provide the Local Governments with the required data and analysis updated

annually to support the comprehensive plan elements and any amendments relating to school concurrency.

- f. Review proposed new residential developments for compliance with concurrency standards, consistent with the requirements of this Agreement.
- g. Review proportionate share mitigation options for new residential development consistent with the requirements of this Agreement.
- h. Provide necessary staff and material support for the Implementation Review Workshops required for the oversight and monitoring of the implementation of this Agreement, as identified in Section 12 of this Agreement.
- i. Provide information to the Local Governments regarding potential school and ancillary facility locations, and infrastructure necessary to support public school facilities, which may necessitate amendments to Future Land Use Plan and Capital Improvements Plan Elements of the Local Governments' comprehensive plans, consistent with the requirements of this Agreement.

10.5 School Board's 5-Year District Facilities Work Program. The School Board's 5-Year District Facilities Work Program shall be used by the School Board to identify school capacity projects necessary to achieve and maintain the adopted LOS standard for CSAs of each school type and to verify its ability to fund the capital improvement projects for the five-year planning period, as amended annually.

- a. Participation. The School Board shall include the Local Governments in the annual preparation of their School Board's 5-Year District Facilities Work Program as provided in Section 1013.33(3)(f), F.S.
- b. Timing. The School Board shall update and adopt the School Board's 5-Year District Facilities Work Program for public schools in Charlotte County on or before September 30th of each year. The School Board's 5-Year District Facilities Work Program shall include the following:
 - 1. Specify all new construction, remodeling or renovation projects which will add permanent capacity or modernize existing facilities.
 - 2. Include a description of each school project, a listing of funds to be spent in each fiscal year, including proportionate share mitigation funding, for the planning, preparation, land acquisition, construction or extension of public facilities needed to support the school project, and actual construction and renovation of each school project which adds capacity or modernizes existing facilities; and the amount of capacity added.
 - 3. Identify the projected enrollment, capacity and utilization percentage of all schools.

4. Update the CSA boundaries, as necessary.
 5. Update the public school LOS standards, as necessary.
- c. Transmittal. Commencing after the effective date of this Agreement, the School Board shall transmit the tentative final draft of the School Board's 5-Year District Facilities Work Program to the Local Governments and the SWG on or before September 1st of each year.
 - d. Adoption. Unless the adoption is delayed by mediation or a lawful challenge, the School Board shall adopt the School Board's 5-Year District Facilities Work Program no later than September 30th and it shall become effective no later than October 1st of each year.
 - e. Additions. The School Board may amend the School Board's 5-Year District Facilities Work Program at anytime to add necessary capacity projects to satisfy the provisions of this Agreement. For additions to the School Board's 5-Year District Facilities Work Program, the School Board must demonstrate its ability to maintain the financial feasibility of the School Board's 5-Year District Facilities Work Program for the current 5-year planning period.
- 10.6 Specific Responsibilities of the County and City. When the Comprehensive Plan amendments adopted in accordance with this Agreement become effective, the Local Governments shall do the following:
- a. Withhold, phase or defer the approval of any site plan, subdivision plan, plat or functional equivalent for new residential units not exempted under Section 11.1(c) of this Agreement, until the School Board staff has issued a SCADL determining that there is school capacity available to serve the development or a development agreement with the School Board has been executed with the applicant and approved consistent with the requirements of this Agreement.
 - b. Share information with the School Board regarding population projections, projections of development and redevelopment for the coming year, infrastructure required to support public school facilities, and amendments to future land use plan elements consistent with the requirements of this Agreement.
 - c. Maintain data for residential development which shall be provided to the School Board annually at the Joint Workshop.
- 10.7 Required Comprehensive Plan Amendments. The County and the City agree to adopt the following Comprehensive Plan amendments no later than December 1st of each year, as necessary. The amendments shall be consistent with this Agreement, and those adopted by the other local government as required by Section 163.3180, F.S.

- a. Development, Adoption and Amendment of the Capital Improvements Element (CIE). An annual update or any amendment to the School Board's 5-Year District Facilities Work Program shall be transmitted to the Local Governments for review and comment no less than 30 days prior to adoption by the School Board. The County and the City shall adopt the School Board's 5-Year District Facilities Work Program into the Capital Improvements Elements of their Comprehensive Plans, provided such adoption does not affect the Local Governments' ability to maintain a financially feasible CIE for the current five-year planning period. The School Board's annually adopted 5-Year District Facilities Work Program shall be included in the next available comprehensive plan amendment round, but no later than December 1st of each year. This will ensure that the CIE uniformly sets forth a financially feasible public school capital facilities plan, consistent with the adopted LOS standards for public schools.
1. Corrections or modifications to the School Board's 5-Year District Facilities Work Program concerning costs, revenue sources, or acceptance of facilities pursuant to dedications, may be accomplished by ordinance, and shall not be deemed an amendment to the comprehensive plan. A copy of the ordinance shall be provided to the State of Florida Department of Economic Opportunity (DEO).
 2. The Local Governments, by adopting the School Board's 5-Year District Facilities Work Program into the CIE of the Local Government's Comprehensive Plan, shall have neither the obligation nor the responsibility for funding the School Board's 5-Year District Facilities Work Program.
- b. Development, Adoption and Amendment of the Public School Facilities Element (PSFE). The County and the City shall maintain and update a Public School Facilities Element which is consistent with those adopted by the other Local Governments within the County. The PSFE and this Agreement must be consistent with each other.

In the event that it becomes necessary to amend the PSFE, the Local Government wishing to initiate an amendment shall request review through the SWG prior to transmitting the amendment to the DEO. The SWG shall be responsible for distributing the amendment to all Parties to this Agreement for review and comment.

1. To achieve required consistency, the County and the City shall adopt the amendment in accordance with the statutory procedures for amending comprehensive plans.
2. If any Local Government objects to the amendment and the dispute cannot be resolved between or among the Parties, the dispute shall be resolved in accordance with the provisions set forth in this Agreement. In such a case,

the Parties agree not to adopt the amendment until the dispute has been resolved.

Any local issues not specifically required by law in the PSFE may be included or modified in the Local Government PSFE by following the normal Comprehensive Plan amendment process and that all such changes must maintain the financial feasibility of the School Board's 5-Year District Facilities Work Program and must not have a cost implication, or create additional coordination for the School Board.

- c. Development, Adoption and Amendment of the Intergovernmental Coordination Element (ICE). The amendment of the ICE in conformance with Section 163.3180(13)(6)(h), F.S., shall be in accordance with that process set forth in Section 163.3184, F.S.

10.8 Continuance of School Concurrency. Unless delayed by mediation or a lawful challenge, the School Concurrency Program described in the Agreement shall remain in force following execution by all Parties.

Section 11. Uniform School Concurrency Process

11.1 General Provisions. The County, the City and the School Board shall ensure that the LOS Standard established for each school type is achieved and maintained.

- a. No final site plan, subdivision plan, plat or the functional equivalent for a new residential development may be approved by the County or City, unless the application is exempt from these requirements as provided in Section 11.1(c) of this Agreement, or until a SCADL has been issued by School Board staff to the Local Government indicating that adequate school capacity exists within a CSA for each school type.
- b. A Local Government may condition the approval of the application to ensure that necessary school facilities are in place, in order to validate or render effective the approval. This shall not limit the authority of a Local Government to deny a site plan, subdivision plan, plat or the functional equivalent, pursuant to its home rule regulatory powers.
- c. The following residential uses shall be considered exempt from the requirements of school concurrency:
 1. All single family lots of record in existence prior to the effective date of school concurrency.
 2. Any residential development that has a site plan, subdivision plan, preliminary or final plat approval or the functional equivalent for a site specific development order approved prior to the effective date of school

concurrency.

3. Any age-restricted community with no permanent residents under the age of eighteen (18). Exemption of an age-restricted community must be subject to a restrictive covenant limiting the age of residents to 18 years and older.
 4. All new residential developments or amendments to previously approved residential developments, which are calculated to generate less than one student.
 5. All new residential plats and site plans (or functional equivalent), or amendments to previously approved residential development orders, which are calculated to generate less than one student.
 6. Development that has been authorized as a DRI pursuant to Chapter 380, F.S., as of July 1, 2005, except that any Notice of Proposed Change, or application of an exchange (equivalency matrix) that increases residential density shall be subject to review for school concurrency at the time of the Notice of Proposed Change.
- d. Upon request by an Applicant submitting any land development application with a residential component, School Board staff shall issue a determination as to whether or not a development, lot or unit is exempt from the requirements of school concurrency.

11.2 School Concurrency Application Review. Any Applicant submitting an application for a site plan, subdivision plan, plat or functional equivalent with a residential component that is not exempt under Section 11.1(c) of this Agreement is subject to school concurrency and must prepare and submit a School Impact Analysis (SIA) form to the Local Government, for review by the School Board staff.

The SIA must indicate the location of the development, number of dwelling units, a phasing schedule (if applicable), and age-restrictions for occupancy (if any). The Local Government shall initiate the review by determining that the application is sufficient for processing. Once deemed sufficient, the Local Government shall transmit the application and the SIA to School Board staff for review. A flow chart outlining the school concurrency review process is included as Appendix C. The process is as follows:

- a. An application for residential development is submitted to the Local Government initiating a sufficiency review. Once deemed sufficient, the Local Government will time and date stamp the application and the SIA, and transmit both to School Board staff for review. The School Board shall charge the Applicant a non-refundable application fee to meet the cost of concurrency review. A receipt for payment from the School District shall be included with the SIA upon submittal to the Local Government.

- b. The School District representative shall review the Applicant's SIA for a residential development which has been submitted and deemed sufficient for processing by the applicable Local Government.
- c. The School District representative shall review each SIA in the order in which it is received and verify whether sufficient student stations for each school type are available or not available in the proposed development's CSA to support the Applicant's proposed development.
 - 1. To determine a proposed development's projected students, the projected number of residential units shall be converted into projected students for all schools of each type within the specific CSA using the Student Generation Rates.
 - 2. New school capacity within a CSA, which is in place or under actual construction at the time of application, will be added to the capacity shown in the CSA.
- d. If the projected student growth from an Applicant's proposed residential development causes the adopted LOS for any school type to be exceeded in the CSA, an adjacent CSA will be reviewed for available capacity.
 - 1. In conducting the adjacency review for available capacity, School Board staff shall consider adjacent CSA capacity to accommodate projected enrollment and, if necessary, shall review each adjacent CSA until all adjacent CSAs have been evaluated for available capacity to satisfy space required to accommodate the projected enrollment. If capacity is identified to accommodate the projected enrollment, School Board staff shall issue a SCADL indicating that capacity is available.
 - 2. If a proposed development causes the LOS in the CSA in which it is located to exceed the adopted LOS standard for any school type, and there is available capacity in an adjacent CSA, the actual development impacts shall be shifted to an adjacent CSA having available capacity. This shift may be accomplished through attendance boundary changes or by assigning the impacts of the development to an adjacent CSA for the school type(s) impacted.
- e. In the event that there is not adequate capacity available to support the adopted LOS standard within the CSA in which the proposed development is located, or in an adjacent CSA to support the development impacts, School Board staff will issue a SCADL within twenty (20) working days of receipt of the SIA detailing why the development is not in compliance, and offer the applicant the opportunity to provide proportionate share mitigation through the mitigation process described below in Section 11.5 of this Agreement, revise the application, or withdraw the

application. If the applicant pursues the mitigation option and the proposed mitigation is accepted, the School Board shall enter into an enforceable and binding agreement with the affected Local Government and the Applicant pursuant to Section 11.5 of this Agreement.

- f. When capacity has been determined to be available, School Board staff shall issue a SCADL verifying available capacity to the applicant and the affected Local Government.
- g. The Local Government shall be responsible for notifying School Board staff when a residential development has received a Certificate of Concurrency (COC) and when the COC for the residential development is modified or is revoked.

11.3 School Concurrency Approval. Issuance of a SCADL by School Board staff identifying that capacity exists within the adopted LOS indicates only that school facilities are currently available. Capacity will not be reserved for the Applicant's proposed residential development until the Local Government issues a COC.

- a. A Local Government shall not issue a COC for a residential development until receiving confirmation of available school capacity within the adopted level of service for each school type, in the form of a SCADL from School Board staff, or an enforceable and binding agreement has been approved.
- b. Once the Local Government has issued a COC, school concurrency for the residential development shall be valid for the life of the COC. Extension or modification of a COC for a residential development shall require a new review for adequate school capacity to be performed by the School District. This review requires issuance of a new SCADL and, if necessary, modification or creation of a binding and enforceable agreement.
- c. Local Governments shall notify School Board staff within ten (10) working days of any official change in the validity (status) of a COC for a residential development.
- d. The Local Government shall not issue a building or development permit or its functional equivalent for a non-exempt residential development without confirming that the development received a COC prior to final site plan, subdivision plan, plat approval or functional equivalent, and the COC is still valid.

11.4 Development Review Table. School Board staff shall create and maintain a Development Review Table (DRT) to measure available capacity at the adopted LOS within the CSAs for each school type. The DRT will be used to compare the projected students from proposed residential developments to the CSAs available capacity.

- a. Student enrollment projections shall be based on the most recently adopted

School Board's 5-Year District Facilities Work Program and the DRT shall be updated to reflect these projections. Available capacity shall be derived using the following formula:

$$\text{Available Capacity} = \text{CSA Capacity}^1 - (\text{Enrollment}^2 + \text{Reserved Capacity}^3)$$

Where:

¹ CSA Capacity = Total FISH Capacity of all schools adjusted by LOS standards and planned portable reductions within the applicable CSA for each school type

² Enrollment = Total CSA Student enrollment as counted at the February FTE

³ Reserved Capacity = Students generated from residential developments exempt from school concurrency and students generated from residential developments approved after the implementation of school concurrency.

- b. Using the February FTE, the reserved student capacity on the DRT for the CSA will be reduced by the number of students for each school type represented by the residential units that received certificates of concurrency within the previous twelve-month (12) period.

11.5 Proportionate Share Mitigation. In the event there is not sufficient school capacity available within the adopted LOS to support an Applicant's development, the School District in coordination with the applicable Local Government(s) may offer the applicant the opportunity to consider proportionate share mitigation options. If an option is accepted by the Applicant, the Applicant, the School Board, and the Local Government shall enter into an enforceable and binding agreement to mitigate the impact from the development through the creation of additional school capacity.

- a. When the student impacts from a proposed development cause a failure to meet the adopted LOS standard, the Applicant's proportionate share will be based on the number of additional student stations necessary to meet the established LOS standard for the affected school type(s). The amount to be paid will be calculated by the total cost per student station for elementary, middle, and high school types, which includes land acquisition, construction and infrastructure expenditures for school sites.
- b. The methodology used to calculate an Applicant's proportionate share mitigation shall be as follows:

$$\text{Proportionate Share} = ({}^1\text{Development students} - \text{Available Capacity}) \times {}^2\text{Total Cost per student station}$$

Where the following definitions apply:

¹Development students = Students generated by residential development that are assigned to that CSA for the affected school type(s).

²Total Cost = The cost per student station by school type, which includes land acquisition, construction and infrastructure expenditures for school sites as determined by the School District.

- c. The Applicant may be allowed to enter a negotiation period with the School Board in an effort to mitigate the impact from the development through the creation of additional capacity. Upon identification, and acceptance of the mitigation option by the School Board and the applicable Local Government, the Applicant shall enter into a binding and enforceable agreement.
 1. A mitigation contribution provided by an Applicant to offset the impact of a residential development must be directed by the School Board toward a school capacity project for the impacted school type(s), and identified in the School Board's 5-Year District Facilities Work Program. The Applicant may pay his proportionate share to mitigate the proposed development impacts in accordance with the formula provided in Section 11.5 (b) of this Agreement.
 2. If a capacity project does not exist in the School Board's 5-Year District Facilities Work Program, the School Board may add a capacity project to the School Board's 5-Year District Facilities Work Program to satisfy the impact from a proposed residential development, if it is funded through the Applicant's proportionate share mitigation contributions or some other specified funding source. Mitigation options may include, but are not limited to the following:
 - (a) Contribution of land or payment for land acquisition in conjunction with the provision of additional school capacity; or
 - (b) Mitigation banking based on the construction of a public school facility in exchange for the right to sell capacity credits; or
 - (c) Provision of additional student stations through the donation of buildings for use as a primary or alternative learning facility; or
 - (d) Provision of additional student stations through the renovation of existing buildings for use as learning facilities; or
 - (e) Construction or expansion of permanent student stations or core capacity; or
 - (f) Construction of a public school facility in advance of the time set forth in the School Board's 5-Year District Facilities Work

Program; or

- (g) Construction of a charter school facility in advance of the time set forth in the School Board's 5-Year District Facilities Work Program, providing that it is built according to State Requirements for Educational Facilities (SREF) standards.
3. For mitigation measures approved by the School Board, the estimated cost to construct the mitigating capacity will reflect the estimated future construction costs at the time of the anticipated construction.
 4. Improvements contributed by the Applicant shall receive school impact fee credit if applicable. The Applicant shall receive an impact fee credit for that portion of the Applicant's educational impact used to fund the improvements on which the proportionate share mitigation is calculated.
 5. If the proportionate share mitigation required is greater than the impact fees generated by the development, the difference between the Applicant's proportionate share and the impact fee credit shall be the responsibility of the Applicant.
 6. Any proportionate share mitigation must be directed by the School Board toward a school capacity improvement identified in the School Board's 5-Year District Facilities Work Program.
 7. Upon conclusion of the negotiation period, a second SCADL shall be issued.
 - (a) If mitigation is agreed to, School Board staff shall issue a new SCADL approving the Applicant's development subject to those mitigation measures agreed to by the Local Government(s), Applicant and the School Board. Final site plan, subdivision plan, plat approval or the functional equivalent, shall not be approved until the mitigation measures are memorialized in an enforceable and binding agreement with the Local Government(s), the School Board and the Applicant that specifically details mitigation provisions to be paid for by the Applicant and includes all relevant terms and conditions.
 - (b) If mitigation is not agreed to, the SCADL shall detail why any mitigation proposals were rejected and why the development is not in compliance with school concurrency requirements. A SCADL indicating either that adequate capacity is available, or that there is no available capacity following the negotiation period as described in Section 11.5(c) of this Agreement, constitutes final agency action by the School Board for purposes of Chapter 120, F.S.

- 11.6 Appeal Process. A person may appeal a determination made as a part of the school concurrency process.
- a. A person substantially affected by the School Board's adequate capacity determination made as a part of the school concurrency process may appeal such determination through the process provided in Chapter 120, F.S.
 - b. A person substantially affected by a Local Government decision made as a part of the school concurrency process may appeal such decision using the process identified in the Local Government's regulations for appeal of development orders. This shall not apply to any decision subject to section (a) above.

Section 12. Oversight Process

- 12.1 Implementation Review. The School Board, the County and the City shall conduct workshops, at least annually, to discuss the implementation of this Agreement. The implementation review workshops shall be open to the public and provide for public comment on the implementation of this Agreement. The implementation review workshops may be either separate workshops conducted by the separate parties to this Agreement, or joint workshops providing for the participation of more than one party to this Agreement. In any event, each of the parties to this Agreement shall be required to participate in at least one implementation review workshop annually. The SWG shall prepare the agendas for the implementation review workshops, which shall include a report on the activities involved in the implementation of the Agreement since the execution of this Agreement, or since the last implementation review workshop, whichever is applicable.

Section 13. Special Provisions

- 13.1 School Board Requirements. The Parties acknowledge and agree that the School Board is or may be subject to the requirements of the Florida and United States Constitutions and other state or federal statutes regarding the operation of the public school system. Accordingly, the Parties agree that this Agreement is not intended, and will not be construed, to interfere with, hinder, or obstruct in any manner, the School Board's constitutional and statutory obligation to provide a uniform system of free public schools on a county-wide basis or to require the School Board to confer with, or obtain the consent of, the Local Governments, as to whether that obligation has been satisfied. Further, the Parties agree that this Agreement is not intended and will not be construed to impose any duty or obligation on the Local Governments for the School Board's performance of its constitutional or statutory obligation.
- 13.2 Land Use Authority. The Parties specifically acknowledge that the County and the City are responsible for approving or denying comprehensive plan amendments and development orders within their own jurisdictions. Nothing herein represents or authorizes a transfer of this authority to any other party.

Section 14. 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 Chapter 164 and Chapter 186, F.S. In the event of any conflict between the dispute resolution procedures contained in Chapter 164 and Chapter 186, the provisions of Chapter 164 shall govern.

Section 15. General

Whenever the terms City, County or School Board are used herein, the applicable term may refer to the governing board of the applicable Local Government or the School Board, or it may refer to the staff of the applicable Local Government or School Board, whichever the context indicates.

Section 16. Amendment of the Agreement

This Agreement may only be amended by written consent of all parties to this Agreement, so long as the amended Agreement remains in compliance with all statutory provisions.

Section 17. Execution of the Agreement

This Agreement may be executed in any number of counterparts, each of which will be deemed an original, but all of which together will constitute one and the same instrument and be the Agreement between the parties.

Section 18. Termination of the Agreement

18.1 Termination. No party to this Agreement may terminate its participation in the agreement, except as follows:

- a. By providing a sixty (60) day written notice to all other parties; or
- b. Another agreement is adopted between that party and the School Board meeting all requirements of law that is consistent with the requirements of this Agreement.

Section 19. Entire Agreement

This Agreement sets forth the entire agreement among the parties relating to the subject matter of this Agreement. This Agreement supersedes all prior and contemporaneous negotiations, understandings and Agreements, written or oral, among the parties.

Section 20. Effective Date

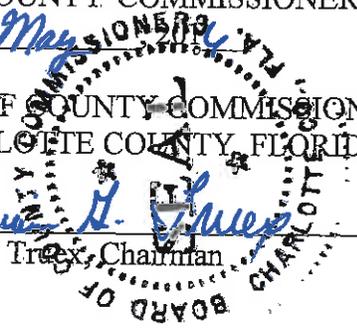
This Agreement becomes effective immediately following the signatures of all Parties to the Agreement.

IN WITNESS WHEREOF, this Interlocal Agreement has been executed by the Parties by their duly authorized officials on the date set forth below.

DULY PASSED AND ADOPTED BY THE BOARD OF COUNTY COMMISSIONERS OF CHARLOTTE COUNTY, THIS 10th Day of May

BOARD OF COUNTY COMMISSIONERS
OF CHARLOTTE COUNTY, FLORIDA

By William G. Trex
William G. Trex, Chairman



ATTEST:
Barbara T. Scott, Clerk of Circuit
Court and Ex-Officio Clerk to the
Board of County Commissioners

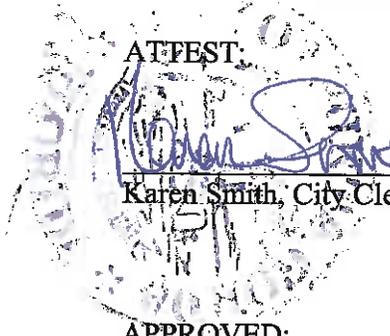
By Michelle D. Beards
Deputy Clerk Apr 2016-022

APPROVED AS TO FORM
AND LEGAL SUFFICIENCY:

Janette S. Knowlton
Janette S. Knowlton, County Attorney
LR 16-0142

DULY PASSED AND ADOPTED BY THE CITY COUNCIL OF THE CITY OF PUNTA GORDA, THIS 18 Day of May, 2016.

ATTEST:





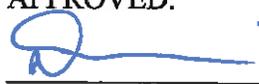
Karen Smith, City Clerk

CITY OF PUNTA GORDA, a Florida
Municipal Corporation



Rachel Keesling, Mayor

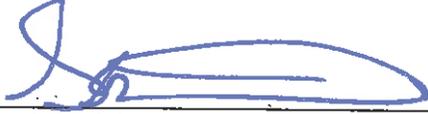
APPROVED:



David Levin, City Attorney

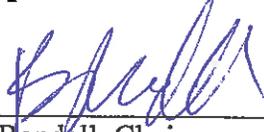
DULY PASSED AND ADOPTED BY THE SCHOOL BOARD OF CHARLOTTE COUNTY,
THIS 10 Day of May, 2016.

ATTEST:



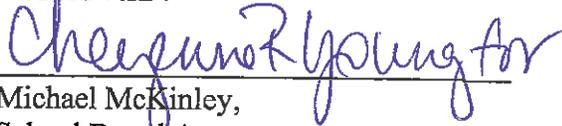
Steve Dionisio, Superintendent

SCHOOL BOARD OF CHARLOTTE
COUNTY



Barbara Rendell, Chairman

APPROVED:



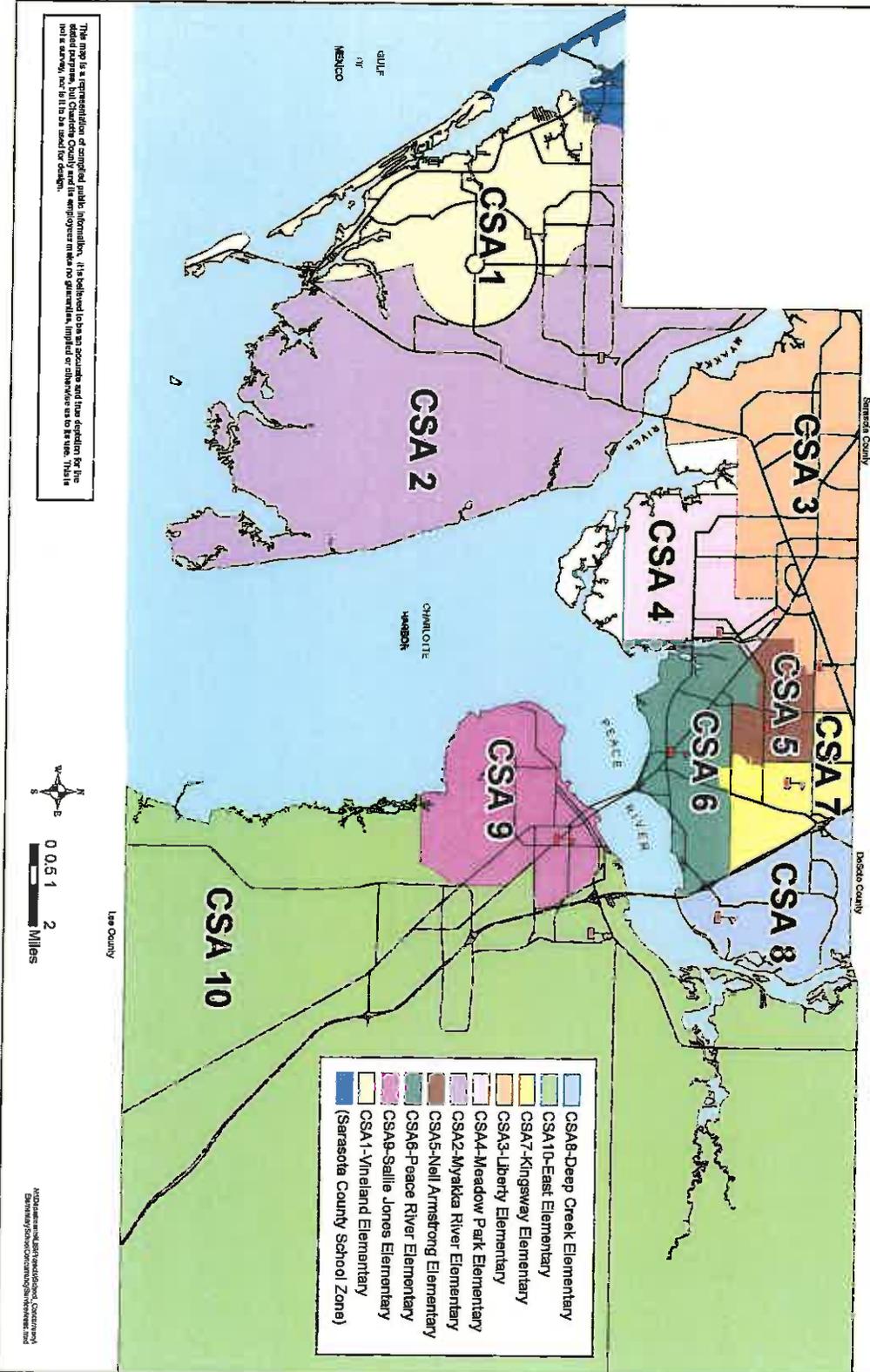
Michael McKinley,
School Board Attorney

APPENDIX A
Concurrency Service Area Map Series



Charlotte County Adopted Elementary School Concurrency Service Areas

Charlotte County Government
 10000 Highway 100, Suite 100
 Charlotte, NC 28226
 (704) 366-2222



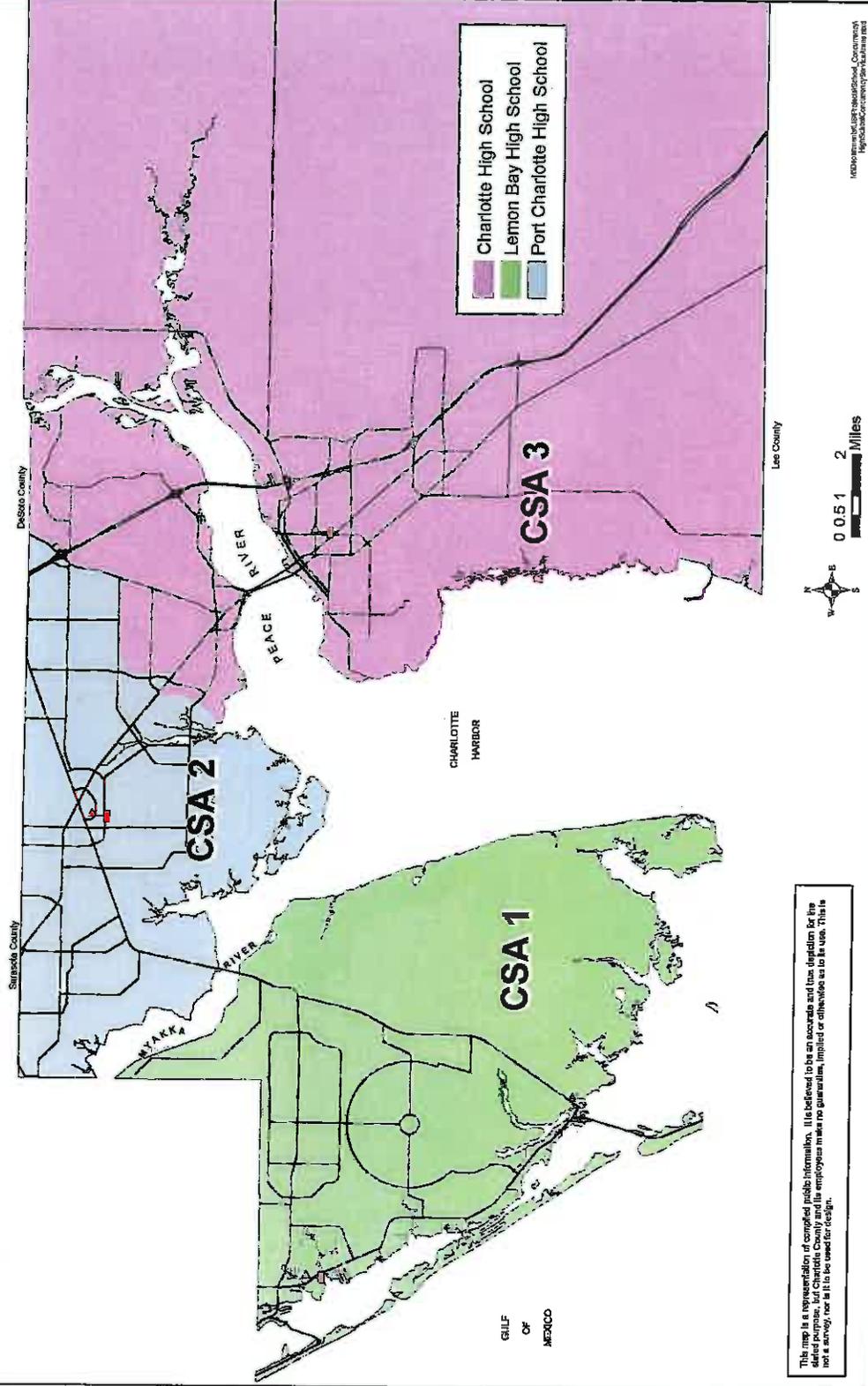
This map is a representation of compiled public information. It is believed to be as accurate and true as the original papers, but Charlotte County and its employees make no guarantee, implied or otherwise as to its use. This is not a survey, nor is it to be used for design.



Lead Information Section

Charlotte County Adopted High School Concurrency Service Areas

Charlotte County Government
To serve and sustain the history of public works
www.charlottecountyfl.gov



APPENDIX B

School District Student Generation Multiplier

Determining the number of students generated from new residential developments is necessary to accurately assess a new residential development's impact on public schools. This student generation rate allows the School District to calculate the number of new students that can be expected from a residential development, based on the number and type of residential units proposed. With the projected number of students defined, the impact of the residential development on available school capacity can be determined. The current student generation multipliers are based on actual students residing in a variety of housing types.

Two data sets were used to calculate the student generation multipliers. These datasets were the 2009 Geographic Information Systems (GIS) property parcel file from the Charlotte County Land Information Office and October 2009 enrollment data from the School District. The student address data were geo-coded to property unit data and street centerline data to create a GIS point file with the spatial location of each student based on their school type and home address. Similar to the previous study, the updated analysis used over 95 percent of the total student population and the volume of data was large enough to offset occasional assignment errors. The total student population used in the multiplier analysis was 16,447. Students with address errors or post office box addresses were not matched to an address by geo-coding. Additionally, home-schooled students and those attending non-traditional schools were not included in the analysis.

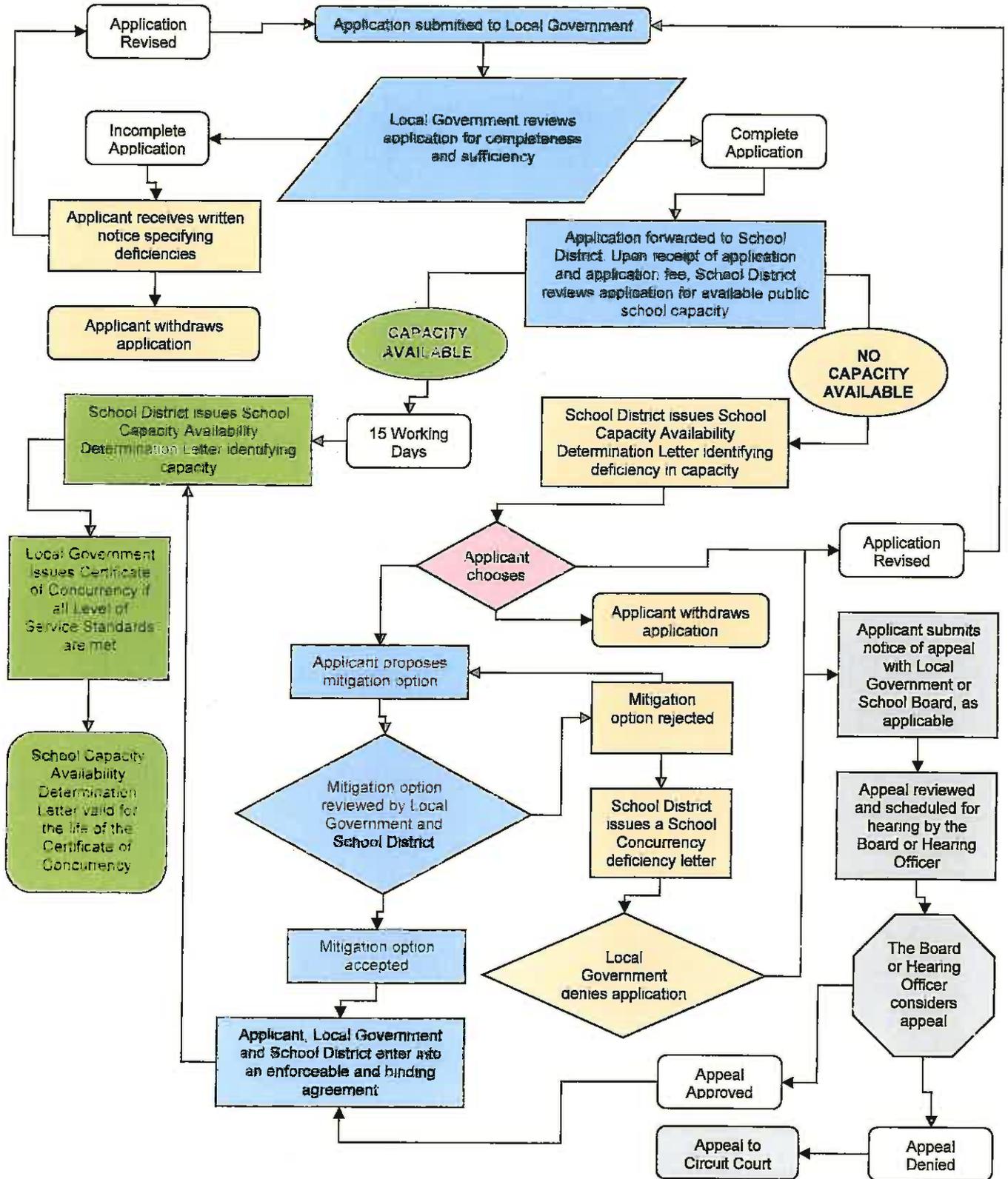
A comparative analysis was conducted to gain an understanding of how Charlotte County's student generation multipliers compare to those prepared by other counties. Based on the analyses, CCPS has adopted a county-wide blended student generation multiplier found below. The blended multiplier is a simple calculation of occupied dwelling units to students by grade level and provides an accurate student generator for new development. The multipliers will be reviewed on a periodic basis. As new and updated information becomes available, the multipliers will be kept current and as accurate as possible while keeping in step with changes in the residential housing market in the county.

County-wide Blended Student Generation Multiplier

<i>Units</i>	<i>Elementary</i>	<i>Middle</i>	<i>High</i>	<i>K-12 Total</i>
108,447	0.065	0.036	0.051	0.152

APPENDIX C

School Concurrency Process Flow Chart



Appendix #5 - City of Punta Gorda Capital Improvement Program, Debt Service Obligations, & Project Total Expenditures

City of Punta Gorda
Capital Improvement & Capital Outlay Programs
FY 2022 to FY 2026

INDEX	Page
Capital Improvement Programs:	
Utilities Construction Fund	1
General Construction Fund	35
1% Sales Tax Fund	66
Additional Five Cent Gas Tax Fund (Paving Program)	88
Capital Outlay Program Summaries:	
General Fund	90
PGI Canal Maintenance Fund	91
BSI Canal Maintenance Fund	92
Utilities OM&R Fund	93
Sanitation Fund	94
Building Fund	95
Information Technology Fund	96

UTILITIES
CAPITAL IMPROVEMENTS PROGRAM
FY 2022 - 2026
 (All figures in thousands of dollars)

PROJECT IDENTIFICATION	Page #	TOTAL PROJECT COST	Prior Years' Funding	FY 2022	FY 2023	FY 2024	FY 2025	FY 2026
FUNDING SOURCE: Utilities Fund current revenue of \$1.12M per policy for R&R Projects								
Water System Utility Relocation Misc. Projects	2	100	Annual	20	20	20	20	20
Watermain Renewal/Replacement Projects	3	500	Annual	100	100	100	100	100
Watermain Valve Projects	4	500	Annual	100	100	100	100	100
Wastewater Gravity Sewer Replacement Projects	5	750	Annual	150	150	150	150	150
Wastewater Lift Station Renewal/Replacement Projects	6	1,000	Annual	200	200	200	200	200
Wastewater Inflow Abatement - Rehabilitation Structures	7	1,000	Annual	200	200	200	200	200
Wastewater Force Main Renewal/Replacement Projects	8	1,750	Annual	350	350	350	350	350
R&R Projects Total		5,600	0	1,120	1,120	1,120	1,120	1,120
FUNDING SOURCE: Utilities Fund current revenues and Reserves, Grants, Impact Fees, and Financing								
Administration								
Septic to Sewer (Areas 1)	9	14,336	300	1,000	13,036	0	0	0
Septic to Sewer (Areas 2)	10	12,938	0	0	0	0	300	12,638
Wastewater Projects								
Wastewater Treatment Plant Tank Coating	11	1,930	530	600	0	0	0	800
Wastewater Treatment Plant Permit Renewal (FDEP)	12	85	0	0	85	0	0	0
Wastewater Deep Injection Well Mechanical Integrity Test (MIT)	13	85	0	0	0	85	0	0
Wastewater Deep Injection Well Permit Renewal	14	85	0	0	0	0	85	0
Wastewater Treatment Plant Improvement	15	40,008	4,008	20,000	16,000	0	0	0
Wastewater Master Pump Facility Upgrade	16	600	0	600	0	0	0	0
Wastewater Henry St 20" Force Main Replacement crossing at I-75	17	2,250	1,150	0	1,100	0	0	0
Henry St 14" Force Main Replacement	18	1,200	1,200	0	0	0	0	0
Riverside Dr Force Main Extension	19	1,100	1,100	0	0	0	0	0
Wastewater Projects Total		74,617	8,288	22,200	30,221	85	385	13,438
Water Projects								
WTP - Hendrickson Dam Inspection Program & Maintenance	20	90	90	0	0	0	0	0
WTP - R.O Water Use Permit	21	432	232	0	0	0	0	200
WTP - Evaluation/Rehabilitation (Filters, SCU & ALUM Tank)	22	23,123	2,323	3,500	17,300	0	0	0
WTP - MFL Evaluation and Recovery Plan	23	700	200	100	100	100	100	100
WTP - Burnt Store Rd Booster Station	24	3,300	0	0	0	3,300	0	0
WTP - RO Brine Disposal Well / Mechanical Integrity Test (MIT)	25	215	65	0	0	0	150	0
WTP - RO Brine Disposal Well (DIW) / Permit Renewal	26	145	60	0	0	0	85	0
WTP - Water Hydrobiological Monitoring Plan (HBMP)	27	100	0	0	0	0	100	0
WTP - Carbon Slurry System Replacement	28	1,100	0	0	0	0	1,100	0
WTP - Dewatering Sludge Press	29	600	0	600	0	0	0	0
WTP - 2 MG Storage Tank Baffle Curtain Replacement	30	500	0	500	0	0	0	0
Water - Taylor Rd Watermain Replacement Upgrade (10" to 12")	31	3,250	3,250	0	0	0	0	0
Water - Solona Watermain Replacement Upgrade	32	3,200	200	0	0	3,000	0	0
Water Tee and Green Water Main Extension	33	250	50	200	0	0	0	0
Water - Bal Harbor Water Main Replacement	34	600	0	0	0	0	0	600
Water Projects Total		37,605	6,470	4,900	17,400	6,400	1,535	900
UTILITIES CONSTRUCTION FUND TOTAL		117,822	14,758	28,220	48,741	7,605	3,040	15,458

Dept/Div:	Utilities Administration	
Contact:	Chuck Pavlos	
Project Title:	Utility Relocation Project To Be Determined	
Project Code:	TBD	
Account #:	411-8423-533-63-09	
Description/Justification:	<p>FY 2022 – 2026</p> <p>Annual funds programmed to relocate water and wastewater lines to accommodate non-programmed projects and/or work performed by FDOT, Charlotte County Public Works and Punta Gorda Public Works.</p> <p>FDOT programs roadway improvements in a 5 year CIP and also performs non-programmed projects. Charlotte County Public Works and Punta Gorda Public Works also perform non-programmed projects on an as needed basis. Funds in TBD are for non-programmed projects, once a project is identified a project code and cost will be identified.</p>	
Priority:	Infrastructure Sustainability	
Goal:	<p>Maintain and enhance the City's infrastructure to ensure efficient service delivery and quality aesthetic appeal.</p> <p>Apply best management practices and systems in infrastructure maintenance.</p>	

Financial Information							
5 Year Plan	Total	Prior	FY 2022	FY 2023	FY 2024	FY 2025	FY 2026
Project Costs							
Planning							
Design	\$20,000	\$0	\$4,000	\$4,000	\$4,000	\$4,000	\$4,000
Construction	\$80,000	\$0	\$16,000	\$16,000	\$16,000	\$16,000	\$16,000
Equipment							
Total	\$100,000	\$0	\$20,000	\$20,000	\$20,000	\$20,000	\$20,000
Funding Sources							
Local - UF	\$100,000	\$0	\$20,000	\$20,000	\$20,000	\$20,000	\$20,000
Impacts on Operations (negative entry indicates operating reduction)							
Personnel							
Contractual							
Equipment							
Other							

Dept/Div:	Utilities Administration	
Contact:	Chuck Pavlos	
Project Title:	Water Main Renewal/Replacement Project To Be Determined	
Project Code:	TBD	
Account #:	411-8423-533-63-21	
Description/Justification:	<p>FY 2022 – 2026</p> <p>TBD funds provide renewal and replacement of existing water mains on an as needed basis. The end of life to water mains cannot be predicted with certainty. Replacement Projects are based on water main breaks and Public Works projects. Annual projects are determined by operations staff to meet immediate needs. Funds unused are released at end of year. Major water main projects are programmed individually.</p> <p>TBD projects may result from immediate need to maintain level of service to customers or to reduce costs responding to multiple repairs. Once a project is identified a project code will be created and funds will be transferred from TBD to the identified project.</p>	
Priority:	Infrastructure Sustainability	
Goal:	<p>Maintain and enhance the City's infrastructure to ensure efficient service delivery and quality aesthetic appeal.</p> <p>Apply best management practices and systems in infrastructure maintenance.</p>	

Financial Information							
5 Year Plan	Total	Prior	FY 2022	FY 2023	FY 2024	FY 2025	FY 2026
Project Costs							
Planning							
Design	\$200,000	\$0	\$40,000	\$40,000	\$40,000	\$40,000	\$40,000
Construction	\$300,000	\$0	\$60,000	\$60,000	\$60,000	\$60,000	\$60,000
Equipment							
Total	\$500,000	\$0	\$100,000	\$100,000	\$100,000	\$100,000	\$100,000
Funding Sources							
Local - UF	\$500,000	\$0	\$100,000	\$100,000	\$100,000	\$100,000	\$100,000
Impacts on Operations (negative entry indicates operating reduction)							
Personnel							
Contractual							
Equipment							
Other							

Dept/Div:	Utilities Administration	
Contact:	Chuck Pavlos	
Project Title:	Watermain Valve Installation	
Project Code:	WMVALV	
Account #:	411-8423-533-63-21	
Description/ Justification:	<p>FY 2022 - 2026</p> <p>Project will install EZ valves on existing water main to assist in isolation of shut off during a main break and limit amount of customers affected.</p> <p>During a water main break water shut off is needed to make repairs. Installation of Insert-a-valve will limit the amount of customers affected by isolating only the area needed for repair. Valves installed will list location and size to identify.</p>	
Priority:	Infrastructure Sustainability	
Goal:	<p>Maintain and enhance the City's infrastructure to ensure efficient service delivery and quality aesthetic appeal.</p> <p>Apply best management practices and systems in infrastructure maintenance.</p>	

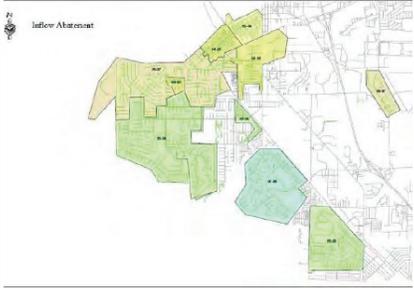
Financial Information							
5 Year Plan	Total	Prior	FY 2022	FY 2023	FY 2024	FY 2025	FY 2026
Project Costs							
Planning							
Design							
Construction							
Equipment	\$500,000	\$0	\$100,000	\$100,000	\$100,000	\$100,000	\$100,000
Total	\$500,000	\$0	\$100,000	\$100,000	\$100,000	\$100,000	\$100,000
Funding Sources							
Local - UF	\$500,000	\$0	\$100,000	\$100,000	\$100,000	\$100,000	\$100,000
Impacts on Operations (negative entry indicates operating reduction)							
Personnel							
Contractual							
Equipment							
Other							

Dept/Div:	Utilities Administration	
Contact:	Chuck Pavlos	
Project Title:	Gravity Sewer Renewal/Replacement Project TBD	
Project Code:	TBD	
Account #:	411-8536-535-63-28	
Description/ Justification:	<p>FY 2022 - 2026</p> <p>Funds in TBD provide renewal and replacement of existing gravity sewer lines and restore asphalt pavement associated with sewer replacement. Old clay pipe gravity lines are candidate projects for replacement with PVC sewer pipe. Gravity Sewer relocation is also coordinated with Public Works resurfacing and paving projects.</p> <p>Renewal and/or replacement of gravity sewer is performed to maintain system capacity by reducing storm water infiltration. Clay pipe gravity sewer lines commonly contribute to storm water infiltration. Public Works projects are typically related to street reconstructions. Once a project is identified a project code will be created and funds will be transferred from TBD to the identified project.</p>	
Priority:	Infrastructure Sustainability	
Goal:	<p>Maintain and enhance the City's infrastructure to ensure efficient service delivery and quality aesthetic appeal.</p> <p>Apply best management practices and systems in infrastructure maintenance.</p>	

Financial Information							
5 Year Plan	Total	Prior	FY 2022	FY 2023	FY 2024	FY 2025	FY 2026
Project Costs							
Planning							
Design	\$150,000	\$0	\$30,000	\$30,000	\$30,000	\$30,000	\$30,000
Construction	\$600,000	\$0	\$120,000	\$120,000	\$120,000	\$120,000	\$120,000
Equipment							
Total	\$750,000	\$0	\$150,000	\$150,000	\$150,000	\$150,000	\$150,000
Funding Sources							
Local - UF	\$750,000	\$0	\$150,000	\$150,000	\$150,000	\$150,000	\$150,000
Impacts on Operations (negative entry indicates operating reduction)							
Personnel							
Contractual							
Equipment							
Other							

Dept/Div:	Utilities Administration	
Contact:	Chuck Pavlos	
Project Title:	Lift Station Renewal/Replacement Project To Be Determined	
Project Code:	TBD	
Account #:	411-8536-535-63-29	
Description/Justification:	<p>FY 2022 – 2026: Annual project funds will design and construct wastewater lift station rehabilitation or improvements on an as needed basis to maintain level of service.</p> <p>The City operates 118 Lift Stations. Funds are programmed to provide improved wastewater transmission capacity identified by wastewater master plan or other studies. Projects may result from immediate need to maintain level of service to customer or reduce cost responding to multiple repairs. Renewal/Replacement of equipment to lift station is performed by staff on an as needed basis with available funding typically for components rather than complete rehabilitation/replacement of an individual lift station. Once a project is identified a project code will be created and funds will be transferred from TBD to the identified project.</p>	
Priority:	Infrastructure Sustainability	
Goal:	<p>Maintain and enhance the City's infrastructure to ensure efficient service delivery and quality aesthetic appeal.</p> <p>Apply best management practices and systems in infrastructure maintenance.</p>	

Financial Information							
5 Year Plan	Total	Prior	FY 2022	FY 2023	FY 2024	FY 2025	FY 2026
Project Costs							
Planning							
Design	\$200,000	\$0	\$40,000	\$40,000	\$40,000	\$40,000	\$40,000
Construction	\$800,000	\$0	\$160,000	\$160,000	\$160,000	\$160,000	\$160,000
Equipment							
Total	\$1,000,000	\$0	\$200,000	\$200,000	\$200,000	\$200,000	\$200,000
Funding Sources							
Local - UF	\$1,000,000	\$0	\$200,000	\$200,000	\$200,000	\$200,000	\$200,000
Impacts on Operations (negative entry indicates operating reduction)							
Personnel							
Contractual							
Equipment							
Other							

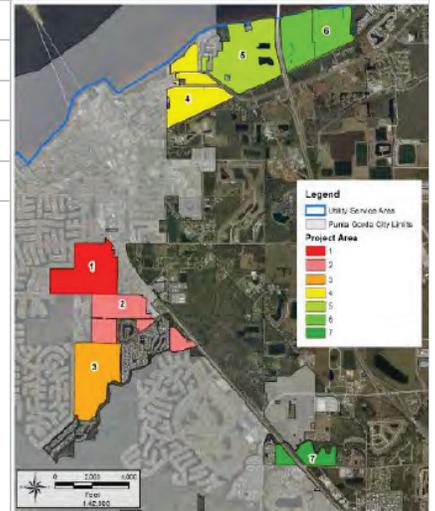
Dept/Div:	Utilities Administration	
Contact:	Chuck Pavlos	
Project Title:	Inflow Abatement Rehab Structures - To Be Determined	
Project Code:	TBD	
Account #:	411-8536-535-63-56	
Description/Justification:	<p>FY 2022 - 2026</p> <p>Annual funds programmed for rehabilitation/ replacement includes interior coating of manholes and wet wells, installation of manhole inflow protectors, smoke testing, grouting and lining sewer lines of the City's wastewater collection system elements throughout the City's service area. Project implements strategies for reducing storm water infiltration.</p> <p>Inspection, replacement and renewal of the City's collection system will reduce infiltration and inflow, reduce collection system defects, maintain capacity, and reduce wet weather overflows. Rehabilitation work extends useful life which reduces replacement needs. Once a project is identified a project code will be created and funds will be transferred from TBD to the identified project.</p>	
Priority:	Infrastructure Sustainability	
Goal:	<p>Maintain and enhance the City's infrastructure to ensure efficient service delivery and quality aesthetic appeal.</p> <p>Apply best management practices and systems in infrastructure maintenance.</p>	

Financial Information							
5 Year Plan	Total	Prior	FY 2022	FY 2023	FY 2024	FY 2025	FY 2026
Project Costs							
Planning							
Design	\$200,000	\$0	\$40,000	\$40,000	\$40,000	\$40,000	\$40,000
Construction	\$800,000	\$0	\$160,000	\$160,000	\$160,000	\$160,000	\$160,000
Equipment							
Total	\$1,000,000		\$200,000	\$200,000	\$200,000	\$200,000	\$200,000
Funding Sources							
Local - UF	\$1,000,000		\$200,000	\$200,000	\$200,000	\$200,000	\$200,000
Impacts on Operations (negative entry indicates operating reduction)							
Personnel							
Contractual							
Equipment							
Other							

Dept/Div:	Utilities Administration	
Contact:	Chuck Pavlos	
Project Title:	Force Main Renewal/Replacement Project To Be Determined	
Project Code:	TBD	
Account #:	411-8536-535-63-67	
Description/ Justification:	<p>FY 2022 - 2026</p> <p>Annual projects may be determined by Operation staff to meet immediate needs. Projects will replace existing Ductile Iron Pipe (DIP) with PVC Pipe.</p> <p>Rehabilitation and improvements to existing facilities are needed as a result of end of service life and changes to the utilities system for growth or other capital projects. Force Main breaks cannot be predicted with certainty. Once a project is identified a project code will be created and funds will be transferred from TBD to the identified project.</p>	
Priority:	Infrastructure Sustainability	
Goal:	<p>Maintain and enhance the City's infrastructure to ensure efficient service delivery and quality aesthetic appeal.</p> <p>Apply best management practices and systems in infrastructure maintenance.</p>	

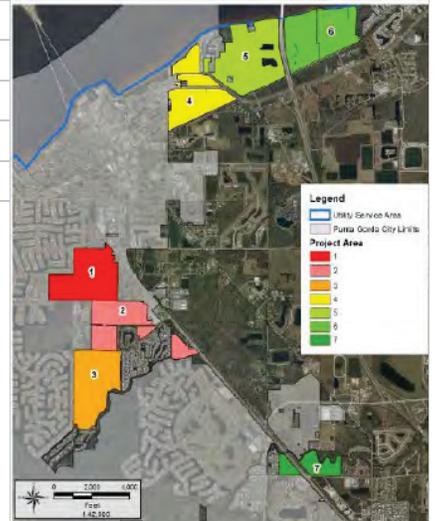
Financial Information							
5 Year Plan	Total	Prior	FY 2022	FY 2023	FY 2024	FY 2025	FY 2026
Project Costs							
Planning							
Design	\$350,000	\$0	\$70,000	\$70,000	\$70,000	\$70,000	\$70,000
Construction	\$1,400,000	\$0	\$280,000	\$280,000	\$280,000	\$280,000	\$280,000
Equipment							
Total	\$1,750,000	\$0	\$350,000	\$350,000	\$350,000	\$350,000	\$350,000
Funding Sources							
Local - UF	\$1,750,000	\$0	\$350,000	\$350,000	\$350,000	\$350,000	\$350,000
Impacts on Operations (negative entry indicates operating reduction)							
Personnel							
Contractual							
Equipment							
Other							

Dept/Div:	Utilities Administration
Contact:	Chuck Pavlos
Project Title:	Septic to Sewer (Area 1)
Project Code:	S2SA1
Account #:	411-8536-535-65-03
Description/Justification:	<p>Jones Edmunds completed a Septic to Sewer Master Plan June 2018. Possible funding plan was developed for gravity sewer system. Preliminary Design Report for Area 1 to evaluate alternative sewer systems and complete PDR for preferred method was issued in FY21.</p> <p>FY 2022-2024 – Construction Breakdown of project cost: Collection system = \$11,028,000 Transmission System = \$3,308,400</p> <p>Project will need to be financed and estimates grant revenue of 25% of collection system.</p> <p>Funding Sources to be used to repay debt: Wastewater Impact Fees, Assessments of all lots in Area 1, Portion of wastewater revenues from Area 1 customers.</p> <p>Charlotte County BCC has adopted a 10 year plan to extend central sewer to properties utilizing on-site septic tanks for wastewater disposal. Punta Gorda is seeking to work in cooperation with BCC to study and construct central sewers.</p>
Priority:	Infrastructure Sustainability
Goal:	<p>Maintain and enhance the City's infrastructure to ensure efficient service delivery and quality aesthetic appeal.</p> <p>Maximize use of new technology in applicable areas through capital budgeting procedures and investment in learning opportunities for staff.</p>



Financial Information							
5 Year Plan	Total	Prior	FY 2022	FY 2023	FY 2024	FY 2025	FY 2026
Project Costs							
Design/Eng.	\$2,867,280	\$300,000	\$1,000,000	\$1,567,280	\$0	\$0	\$0
Construction	\$11,469,120	\$0	\$0	\$11,469,120	\$0	\$0	\$0
Total	\$14,336,400	\$300,000	\$1,000,000	\$13,036,400	\$0	\$0	\$0
Funding Sources							
Grants (est.)-G	\$2,750,000	\$0	\$0	\$2,750,000	\$0	\$0	\$0
Finance (est.)-RF	\$11,286,400	\$0	\$1,000,000	\$10,286,400	\$0	\$0	\$0
Local-(est.)-UF	\$300,000	\$300,000	\$0	\$0	\$0	\$0	\$0
Impacts on Operations (negative entry indicates operating reduction)							
Electric, R&M	\$120,000	\$0	\$0	\$0	\$40,000	\$40,000	\$40,000
Impacts on Revenues (negative entry indicates revenue reduction)							
Assessments	\$1,072,000	\$0	\$0	\$268,000	\$268,000	\$268,000	\$268,000
WW Impacts	\$328,000	\$0	\$0	\$82,000	\$82,000	\$82,000	\$82,000
WW Revenue	\$483,000	\$0	\$0	\$0	\$161,000	\$161,000	\$161,000

Dept/Div:	Utilities Administration
Contact:	Chuck Pavlos
Project Title:	Septic to Sewer (Area 2)
Project Code:	S2SA2
Account #:	411-8536-535-65-03
Description/Justification:	<p>Jones Edmunds completed a Septic to Sewer Master Plan June 2018. Possible funding plan was developed for gravity sewer system. Preliminary Design Report for Area 1 to evaluate alternative sewer systems and complete PDR for preferred method was issued in FY21.</p> <p>FY 2025-2026 – Design, engineering and construction. Breakdown of project cost: Collection system = \$9,952,000 Transmission system = \$2,985,600</p> <p>Project will need to be financed and estimates grant revenue of 25% of collection system.</p> <p>Funding sources to be used to repay debt: Wastewater Impact Fees, Assessments of all lots in Area 2, Portion of wastewater revenues from Area 2 customers.</p> <p>Charlotte County BCC has adopted a 10 year plan to extend central sewer to properties utilizing on-site septic tanks for wastewater disposal. Punta Gorda is seeking to work in cooperation with BCC to study and construct central sewers.</p>
Priority:	Infrastructure Sustainability
Goal:	<p>Maintain and enhance the City's infrastructure to ensure efficient service delivery and quality aesthetic appeal.</p> <p>Maximize use of new technology in applicable areas through capital budgeting procedures and investment in learning opportunities for staff.</p>



Financial Information							
5 Year Plan	Total	Prior	FY 2022	FY 2023	FY 2024	FY 2025	FY 2026
Project Costs							
Design	\$2,587,520	\$0	\$0	\$0	\$0	\$60,000	\$2,527,520
Construction	\$10,350,080	\$0	\$0	\$0	\$0	\$240,000	\$10,110,080
Total	\$12,937,600	\$0	\$0	\$0	\$0	\$300,000	\$12,637,600
Funding Sources							
Grants (est.)-G	\$2,492,500	\$0	\$0	\$0	\$0	\$0	\$2,492,500
Finance (est.)-RF	\$10,445,100	\$0	\$0	\$0	\$0	\$300,000	\$10,145,100
Local-(est.)-UF	\$0	\$0	\$0	\$0	\$0	\$0	\$0
Impacts on Operations (negative entry indicates operating reduction)							
Electric, R&M	\$0	\$0	\$0	\$0	\$0	\$0	\$0
Impacts on Operations (negative entry indicates operating reduction)							
Assessments	\$245,800	\$0	\$0	\$0	\$0	\$0	\$245,800
WW Impacts	\$42,000	\$0	\$0	\$0	\$0	\$0	\$42,000
WW Revenue	\$0	\$0	\$0	\$0	\$0	\$0	\$0

Dept/Div:	Utilities Administration	
Contact:	Chuck Pavlos	
Project Title:	Wastewater Treatment Plant Tank Coating	
Project Code:	WWP-TC	
Account #:	411-8711-535-63-31	
Description/Justification:	<p>Replace interior coating system in our wastewater equalization tank. There are two tanks at the MPF and two tanks at the BPF. Coating replacement is on a rotational schedule based on need every 5 years.</p> <p>FY 2022 - Coat 2 tanks at BPF FY 2026 - Coat 2 tanks at MPF</p> <p>Coating system is needed to protect concrete surfaces from wastewater. Interior tank coating system has a warranty of 5 years. Annual inspection will be performed. When a coating failure is detected outside of the warranty period, the coating system will be replaced.</p>	
Priority:	Infrastructure Sustainability	
Goal:	Apply best management practices and systems in infrastructure maintenance.	

Financial Information							
5 Year Plan	Total	Prior	FY 2022	FY 2023	FY 2024	FY 2025	FY 2026
Project Costs							
Planning							
Design							
Improvement	\$1,400,000	\$0	\$600,000	\$0	\$0	\$0	\$800,000
Equipment							
Total	\$1,400,000	\$0	\$600,000	\$0	\$0	\$0	\$800,000
Funding Sources							
Local - UF	\$1,400,000	\$0	\$600,000	\$0	\$0	\$0	\$800,000
Impacts on Operations (negative entry indicates operating reduction)							
Personnel							
Contractual							
Equipment							
Other							

Dept/Div:	Utilities Administration	
Contact:	Chuck Pavlos	
Project Title:	Wastewater Treatment Plant Operating Permit Renewal (FDEP)	
Project Code:	WWPERM	
Account #:	411-8711-535-31-14	
Description/ Justification:	<p>FY 2023</p> <p>Funds are needed for engineering services to prepare permit application materials for the renewal of the WWTP Operating Permit required and issued by Florida Department of Environmental Protection.</p> <p>Florida Department of Environmental Protection requires the WWTP to acquire an operating permit. Current operating permit (FLA118371) is valid from September 22, 2019 - September 21, 2024. Renewal of operating permit is required in 5 year intervals. Next permit renewal is due September 21, 2024.</p>	
Priority:	Infrastructure Sustainability	
Goal:	Apply best management practices and systems in infrastructure maintenance.	

Financial Information							
5 Year Plan	Total	Prior	FY 2022	FY 2023	FY 2024	FY 2025	FY 2026
Project Costs							
Planning							
Engineering	\$85,000	\$0	\$0	\$85,000	\$0	\$0	\$0
Construction							
Equipment							
Total	\$85,000	\$0	\$0	\$85,000	\$0	\$0	\$0
Funding Sources							
Local - UF	\$85,000	\$0	\$0	\$85,000	\$0	\$0	\$0
Impacts on Operations (negative entry indicates operating reduction)							
Personnel							
Contractual							
Equipment							
Other							

Dept/Div:	Utilities Administration	
Contact:	Chuck Pavlos	
Project Title:	Wastewater Treatment Plant - Deep Injection Well Mechanical Integrity Testing (MIT)	
Project Code:	DWMIT	
Account #:	411-8711-535-31-14	
Description/ Justification:	<p>FY 2024</p> <p>The WWTP effluent disposal well is regulated by an Underground Injection Control (UIC) permit. Permit compliance requires Mechanical Integrity Testing (MIT) at 5 year intervals. Project will perform MIT for the required period. MIT must be performed by May 2025 prior to DIW permit renewal.</p> <p>MIT is required by UIC permit on or before May 27, 2025.</p>	
Priority:	Partnerships, Communication and Collaboration	
Goal:	Emphasize transparency in City operations, reporting, and activities.	

Financial Information							
5 Year Plan	Total	Prior	FY 2022	FY 2023	FY 2024	FY 2025	FY 2026
Project Costs							
Planning							
Engineering	\$85,000	\$0	\$0	\$0	\$85,000	\$0	\$0
Construction							
Equipment							
Total	\$85,000	\$0	\$0	\$0	\$85,000	\$0	\$0
Funding Sources							
Local - UF	\$85,000	\$0	\$0	\$0	\$85,000	\$0	\$0
Impacts on Operations (negative entry indicates operating reduction)							
Personnel							
Contractual							
Equipment							
Other							

Dept/Div:	Utilities Administration	
Contact:	Chuck Pavlos	
Project Title:	Wastewater Treatment Plant - Deep Injection Well (DIW) Permit Renewal (FDEP)	
Project Code:	DWPERM	
Account #:	411-8711-535-31-14	
Description/Justification:	<p>FY 2025</p> <p>Funds are needed for engineering services to prepare permit application materials for the renewal of the Wastewater Treatment Plant Deep Injection Well (DIW) regulated by Underground Injection Control (UIC) permit required and issued by Florida Department of Environmental Protection (FDEP). UIC/DIW permit was issued January 7, 2021 and is due to expire January 7, 2026.</p> <p>FDEP requires the Wastewater Treatment Plant to renew its UIC permit for DIW; the next permit renewal is due prior to January 7, 2026.</p>	
Priority:	Partnerships, Communication and Collaboration	
Goal:	Emphasize transparency in City operations, reporting, and activities.	

Financial Information							
5 Year Plan	Total	Prior	FY 2022	FY 2023	FY 2024	FY 2025	FY 2026
Project Costs							
Planning							
Design	\$85,000	\$0	\$0	\$0	\$0	\$85,000	\$0
Construction							
Equipment							
Total	\$85,000	\$0	\$0	\$0	\$0	\$85,000	\$0
Funding Sources							
Local - UF	\$85,000	\$0	\$0	\$0	\$0	\$85,000	\$0
Impacts on Operations (negative entry indicates operating reduction)							
Personnel							
Contractual							
Equipment							
Other							

Dept/Div:	Utilities Administration	
Contact:	Chuck Pavlos	
Project Title:	Wastewater Treatment Plant Improvement/Expansion	
Project Code:	WWPEXP	
Account #:	411-8711-535-63-31	
Description/Justification:	<p>FY 2020: The City completed an evaluation and recommendation for WWTP Improvements.</p> <p>FY 2021: Negotiate FWC lease and complete engineering design and permitting.</p> <p>FY 2022 - 2026: Construct Improvements.</p> <p>Funding sources will include wastewater impact fees and financing. Debt service will be repaid through wastewater impact fees and user fees.</p> <p>A planned approach for WWTP capacity and expansion is required by DEP rule when the capacity of the WWTP reaches 75% of permitted capacity.</p>	
Priority:	Infrastructure Sustainability	
Goal:	Maintain and enhance the City's infrastructure to ensure efficient and effective service delivery and quality aesthetic appeal. Apply best management practices and systems in infrastructure maintenance.	

Financial Information							
5 Year Plan	Total	Prior	FY 2022	FY 2023	FY 2024	FY 2025	FY 2026
Project Costs							
Planning							
Design	\$7,200,000	\$4,008,000	\$3,192,000	\$0	\$0	\$0	\$0
Construction	\$32,808,000	\$0	\$16,808,000	\$16,000,000	\$0	\$0	\$0
Equipment							
Total	\$40,008,000	\$4,008,000	\$20,000,000	\$16,000,000	\$0	\$0	\$0
Funding Sources							
Finance (est.)-RF	\$35,000,000	\$0	\$19,500,000	\$15,500,000	\$0	\$0	\$0
WW Impacts-UIF	\$1,200,000	\$200,000	\$500,000	\$500,000	\$0	\$0	\$0
Local – UF	\$3,808,000	\$3,808,000	\$0	\$0	\$0	\$0	\$0
Impacts on Operations (negative entry indicates operating reduction)							
Personnel							
Land Lease	(\$28,000)	\$0	\$0	\$0	\$0	(\$14,000)	(\$14,000)
Equipment							
Other							

Dept/Div:	Utilities Administration	
Contact:	Chuck Pavlos	
Project Title:	Wastewater Treatment Plant - Master Pump Facility Upgrade	
Project Code:	MPFUPG	
Account #:	411-8711-535-63-33	
Description/ Justification:	<p>FY 2022</p> <p>Upgrade and replace three wastewater pumps, piping, and electrical VFD and motor controls at the Master Pump Facility (MPF) located at 900 Henry Street.</p> <p>The existing pumps and controls were installed in 2000 and have reached end of service life. Newer pump designs will provide improved reliability and performance.</p>	
Priority:	Infrastructure Sustainability	
Goal:	Maintain and enhance the City's infrastructure to ensure efficient and effective service delivery and quality aesthetic appeal. Apply best management practices and systems in infrastructure maintenance.	

Financial Information							
5 Year Plan	Total	Prior	FY 2022	FY 2023	FY 2024	FY 2025	FY 2026
Project Costs							
Planning							
Design	\$120,000	\$0	\$120,000	\$0	\$0	\$0	\$0
Construction	\$480,000	\$0	\$480,000	\$0	\$0	\$0	\$0
Equipment							
Total	\$600,000	\$0	\$600,000	\$0	\$0	\$0	\$0
Funding Sources							
Local - UF	\$600,000	\$0	\$600,000	\$0	\$0	\$0	\$0
Impacts on Operations (negative entry indicates operating reduction)							
Personnel							
Contractual							
Equipment							
Other							

Dept/Div:	Utilities Administration	
Contact:	Chuck Pavlos	
Project Title:	Henry Street 20" Force Main Replacement Crossing at I-75	
Project Code:	I75RFM	
Account #:	411-8536-535-63-67	
Description/Justification:	<p>FY 2023</p> <p>Replace a 18" DIP wastewater force main which crosses under I-75 with 20" PVC force main. The facility was constructed in 1981 as part of I-75 initial construction. The existing condition of the pipe is unknown.</p> <p>Replacing the DIP pipe with PVC pipe will improve pipe reliability.</p>	
Priority:	Infrastructure Sustainability	
Goal:	Maintain and enhance the City's infrastructure to ensure efficient and effective service delivery and quality aesthetic appeal. Apply best management practices and systems in infrastructure maintenance.	

Financial Information							
5 Year Plan	Total	Prior	FY 2022	FY 2023	FY 2024	FY 2025	FY 2026
Project Costs							
Planning							
Design	\$450,000	\$450,000	\$0	\$0	\$0	\$0	\$0
Construction	\$1,800,000	\$700,000	\$0	\$1,100,000	\$0	\$0	\$0
Equipment							
Total	\$2,250,000	\$1,150,000	\$0	\$1,100,000	\$0	\$0	\$0
Funding Sources							
Local - UF	\$2,250,000	\$1,150,000	\$0	\$1,100,000	\$0	\$0	\$0
Impacts on Operations (negative entry indicates operating reduction)							
Personnel							
R&M and processing costs due to increased capacity	\$3,000	\$0	\$0	\$0	\$1,000	\$1,000	\$1,000

Dept/Div:	Utilities Administration	
Contact:	Chuck Pavlos	
Project Title:	Henry Street 14" Force Main Replacement	
Project Code:	HS-FM	
Account #:	411-8536-535-63-67	
Description/Justification:	<p>FY 2021-2022</p> <p>Replace 1700 LF of 14" cast iron force main to PVC on Henry St and gravity manhole replacement at LS25 at Maud St.</p> <p>Existing 14" force main is cast iron and at the end of expected useful life. The manhole at LS25 is sinking and must be replaced as part of this project due the alignment of the 14" force main. Replacement update to PVC will increase reliability of wastewater transmission in the Henry St alignment. All force main on Henry/Marion alignment between Bal Harbor and Bass inlet has been upgraded to PVC.</p>	
Priority:	Infrastructure Sustainability	
Goal:	<p>Maintain and enhance the City's infrastructure to ensure efficient service delivery and quality aesthetic appeal. Maximize use of technology in applicable areas through capital budgeting procedures and investment in learning opportunities for staff.</p>	

Financial Information							
5 Year Plan	Total	Prior	FY 2022	FY 2023	FY 2024	FY 2025	FY 2026
Project Costs							
Planning							
Design	\$500,000	\$500,000	\$0	\$0	\$0	\$0	\$0
Construction	\$700,000	\$700,000	\$0	\$0	\$0	\$0	\$0
Equipment							
Total	\$1,200,000	\$1,200,000	\$0	\$0	\$0	\$0	\$0
Funding Sources							
Local - UF	\$1,200,000	\$1,200,000	\$0	\$0	\$0	\$0	\$0
Impacts on Operations (negative entry indicates operating reduction)							
Personnel							
Contractual							
Equipment							
Other							

Dept/Div:	Utilities Administration	
Contact:	Chuck Pavlos	
Project Title:	WTP Hendrickson Dam Inspection Program and Management	
Project Code:	DAMINS	
Account #:	411-8422-533-63-30	
Description/ Justification:	<p>Funds are programmed for dam inspections as needed, producing a report documenting the condition of the dam components and recommending maintenance and rehabilitation.</p> <p>Funds will be carried over from previous years.</p> <p>Hendrickson Dam impounds water from Shell Creek to provide a water supply reservoir for the WTP. The dam was constructed in 1965 and a major rehabilitation of the spillway was completed in 2010. A specialized engineering firm will be engaged to perform dam inspections and develop recommendations for maintenance and rehabilitation projects.</p>	
Priority:	Infrastructure Sustainability	
Goal:	Apply best management practices and systems in infrastructure maintenance.	

Financial Information							
5 Year Plan	Total	Prior	FY 2022	FY 2023	FY 2024	FY 2025	FY 2026
Project Costs							
Planning							
Engineering	\$90,186	\$90,186	\$0	\$0	\$0	\$0	\$0
Construction							
Equipment							
Total	\$90,186	\$90,186	\$0	\$0	\$0	\$0	\$0
Funding Sources							
Local - UF	\$90,186	\$90,186	\$0	\$0	\$0	\$0	\$0
Impacts on Operations (negative entry indicates operating reduction)							
Personnel							
Contractual							
Equipment							
Other							

Dept/Div:	Utilities Administration	
Contact:	Chuck Pavlos	
Project Title:	Water Treatment Plant Water Use Permit (SWFWMD)	
Project Code:	RO-WUP	
Account #:	411-8422-533-31-14	
Description/Justification:	<p>FY 2026</p> <p>Project will create a data review of permitting requirements and dates, close out the Aquifer Storage and Recovery (ASR) Underground Injection Control (UIC), create a ground water model, develop a Well Field Management Plan, and implement a continuous well field data monitoring program.</p> <p>WUP application renewal will be 2026.</p> <p>The City obtained a Water Use Permit (WUP) from SWFWMD as a necessary part of the RO WTP project. Permit modification was issued January 2018. Special condition 6 of the WUP requires the City to implement a Wellfield Management Plan (WMP). The WMP will require 2 years to implement. A monitoring plan will be implemented after the WMP adoption.</p>	
Priority:	Infrastructure Sustainability	
Goal:	<p>Maintain and enhance the City's infrastructure to ensure efficient service delivery and quality aesthetic appeal.</p> <p>Apply best management practices and systems in infrastructure maintenance.</p>	

Financial Information							
5 Year Plan	Total	Prior	FY 2022	FY 2023	FY 2024	FY 2025	FY 2026
Project Costs							
Planning							
Engineering	\$432,000	\$232,000	\$0	\$0	\$0	\$0	\$200,000
Construction							
Equipment							
Total	\$432,000	\$232,000	\$0	\$0	\$0	\$0	\$200,000
Funding Sources							
Local - UF	\$432,000	\$232,000	\$0	\$0	\$0	\$0	\$200,000
Impacts on Operations (negative entry indicates operating reduction)							
Personnel							
Contractual							
Equipment							
Other							

Dept/Div:	Utilities Administration	  
Contact:	Chuck Pavlos	
Project Title:	Shell Creek Water Treatment Plant Evaluation & Rehabilitation (Filters, SCU, ALUM Tanks)	
Project Code:	WTP-EV	
Account #:	411-8422-533-65-02	
Description/Justification:	<p>Engineering services to evaluate the scope of improvements and rehabilitation work necessary to restore the WTP Granular Filters, Solids Contact Units (SCUs), and Alum Tank to design standards. Prepare a preliminary design report (PDR) to identify work and equipment required, the work sequencing, prepare design sheets, and provide a construction cost estimate. Take corrective action to resolve deficiencies to restore to proper operating condition, and provide a 20 year operating life. Planning estimate for total project is \$23,123,000</p> <p>Projects combined into one: FY 2020-2021 Filter Evaluation and design \$1,823,000, FY 2021 SCU Tank Coating \$500,000, and FY 2022 ALUM Tank \$800,000.</p> <p>The Shell Creek WTP treatment process requires filtration. Issues identified include: elevated filter effluent turbidity; elevated filter headloss; low filter run times; deteriorating concrete in filters, SCU, and Alum tank coatings. This is a critical process.</p>	
Priority:	Infrastructure Sustainability	
Goal:	Maintain and enhance the City's infrastructure to ensure efficient service delivery and quality aesthetic appeal. Apply best management practices and systems in infrastructure maintenance.	

Financial Information							
5 Year Plan	Total	Prior	FY 2022	FY 2023	FY 2024	FY 2025	FY 2026
Project Costs							
Planning							
Design	\$664,600	\$664,600	\$0	\$0	\$0	\$0	\$0
Construction	\$22,458,400	\$1,658,400	\$3,500,000	\$17,300,000	\$0	\$0	\$0
Equipment							
Total	\$23,123,000	\$2,323,000	\$3,500,000	\$17,300,000	\$0	\$0	\$0
Funding Sources							
Local - UF	\$5,823,000	\$2,323,000	\$3,500,000	\$0	\$0	\$0	\$0
Finance (est.)-RF	\$17,300,000	\$0	\$0	\$17,300,000	\$0	\$0	\$0
Impacts on Operations (negative entry indicates operating reduction)							
Personnel							
Contractual							
Equipment							
TBD from PDR	TBD	\$0	\$0	\$0	TBD	TBD	TBD

Dept/Div:	Utilities Administration	
Contact:	Chuck Pavlos	
Project Title:	Shell Creek MFL Rule Evaluation and Recovery Plan	
Project Code:	MFLEVL	
Account #:	411-8423-533-31-14	
Description/Justification:	<p>SWFWMD is proposing to implement a new regulation to create minimum flow criteria to Shell Creek. This new regulation will restrict water use from Shell Creek during low flow periods. This restriction will force the City to obtain water supply from groundwater and reverse osmosis treatment or purchase water from the water supply authority.</p> <p>SWFWMD rule making is authorized by Florida Statutes. If SWFWMD implements water use restrictions, the City will need to identify and implement new water supply projects. Project identification is dependent upon rule making outcome.</p>	
Priority:	Infrastructure Sustainability	
Goal:	<p>Maintain and enhance the City's infrastructure to ensure efficient service delivery and quality aesthetic appeal.</p> <p>Apply best management practices and systems in infrastructure maintenance.</p>	

Financial Information							
5 Year Plan	Total	Prior	FY 2022	FY 2023	FY 2024	FY 2025	FY 2026
Project Costs							
Planning							
Design	\$700,000	\$200,000	\$100,000	\$100,000	\$100,000	\$100,000	\$100,000
Construction							
Equipment							
Total	\$700,000	\$200,000	\$100,000	\$100,000	\$100,000	\$100,000	\$100,000
Funding Sources							
Local - UF	\$700,000	\$200,000	\$100,000	\$100,000	\$100,000	\$100,000	\$100,000
Impacts on Operations (negative entry indicates operating reduction)							
Personnel							
Contractual							
Equipment							
Other							

Dept/Div:	Utilities Administration	
Contact:	Chuck Pavlos	
Project Title:	Water Treatment Plant Booster Station (Burnt Store Rd)	
Project Code:	BOOST	
Account #:	411-8422-533-65-06	
Description/Justification:	FY 2024 Add high service pump station to Burnt Store Road elevated tank. Improve water storage and pressure to water distribution lines in Burnt Store zone.	
Priority:	Infrastructure Sustainability	
Goal:	Maintain and enhance the City's infrastructure to ensure efficient service delivery and quality aesthetic appeal. Apply best management practices and systems in infrastructure maintenance.	

Financial Information							
5 Year Plan	Total	Prior	FY 2022	FY 2023	FY 2024	FY 2025	FY 2026
Project Costs							
Planning							
Design	\$600,000	\$0	\$0	\$0	\$600,000	\$0	\$0
Construction	\$2,700,000	\$0	\$0	\$0	\$2,700,000	\$0	\$0
Equipment							
Total	\$3,300,000	\$0	\$0	\$0	\$3,300,000	\$0	\$0
Funding Sources							
Local - UIF	\$1,650,000	\$0	\$0	\$0	\$1,650,000	\$0	\$0
Local - UF	\$1,650,000	\$0	\$0	\$0	\$1,650,000	\$0	\$0
Impacts on Operations (negative entry indicates operating reduction)							
Personnel							
Contractual							
Equipment							
Electric and maintenance	\$6,000	\$0	\$0	\$0	\$0	\$3,000	\$3,000

Dept/Div:	Utilities Administration	
Contact:	Chuck Pavlos	
Project Title:	Water Treatment Plant - RO Brine Disposal Well Mechanical Integrity Testing (MIT)	
Project Code:	WP-MIT	
Account #:	411-8422-533-31-14	
Description/Justification:	<p>FY 2025</p> <p>Project will perform Mechanical Integrity Testing (MIT) for the required period regulated by an Underground Injection Control (UIC) permit.</p> <p>The WTP RO brine disposal well is regulated by an Underground Injection Control (UIC) permit. Permit compliance requires Mechanical Integrity Testing (MIT) at 5 year intervals.</p>	
Priority:	Partnerships, Communication & Collaboration	
Goal:	Emphasize transparency in City operations, reporting and activities.	

Financial Information							
5 Year Plan	Total	Prior	FY 2022	FY 2023	FY 2024	FY 2025	FY 2026
Project Costs							
Planning							
Engineering	\$215,000	\$65,000	\$0	\$0	\$0	\$150,000	\$0
Construction							
Equipment							
Total	\$215,000	\$65,000	\$0	\$0	\$0	\$150,000	\$0
Funding Sources							
Local - UF	\$215,000	\$65,000	\$0	\$0	\$0	\$150,000	\$0
Impacts on Operations (negative entry indicates operating reduction)							
Personnel							
Contractual							
Equipment							
Other							

Dept/Div:	Utilities Administration	
Contact:	Chuck Pavlos	
Project Title:	Water Treatment Plant RO - Brine Disposal Well (DIW) Permit Renewal	
Project Code:	WPDIWP	
Account #:	411-8422-533-31-14	
Description/Justification:	<p>FY 2025</p> <p>Engineering services to prepare and submit permit application materials for the renewal of Water Treatment Plant RO Brine Disposal Well (DIW) Permit regulated by Underground Injection Control (UIC) permit required by Florida Department of Environmental Protection (FDEP) prior to expiration.</p> <p>FDEP requires the Water Treatment Plant to renew its Underground Injection Control (UIC) permit for Deep Injection Well (DIW) every 5 years. City applied for operating permit October 2021. Next permit renewal is due October 2026.</p>	
Priority:	Partnerships, Communication and Collaboration	
Goal:	Emphasize transparency in City operations, reporting, and activities.	

Financial Information							
5 Year Plan	Total	Prior	FY 2022	FY 2023	FY 2024	FY 2025	FY 2026
Project Costs							
Planning							
Design	\$145,000	\$60,000	\$0	\$0	\$0	\$85,000	\$0
Construction							
Equipment							
Total	\$145,000	\$60,000	\$0	\$0	\$0	\$85,000	\$0
Funding Sources							
Local - UF	\$145,000	\$60,000	\$0	\$0	\$0	\$85,000	\$0
Impacts on Operations (negative entry indicates operating reduction)							
Personnel							
Contractual							
Equipment							
Other							

Dept/Div:	Utilities Administration	
Contact:	Chuck Pavlos	
Project Title:	Water Treatment Plant - Hydro Biological Monitoring Plan (HBMP)	
Project Code:	WPHBMP	
Account #:	411-8422-533-31-14	
Description/Justification:	<p>FY 2025</p> <p>SWFWMD water use permit requires a sampling and testing plan to document biological conditions of Shell Creek. Testing and sampling is required on a monthly basis each year and a summary report is required on a 5 year cycle. The cost of the summary report is budgeted on a 5 year recurring cycle. Last report was completed in 2020 and the next is due in FY 2025.</p> <p>The City Water Treatment Plant (WTP) obtains source water from Shell Creek, authorized by a Water Use Permit (WUP) issued by SWFWMD. The WUP requires the City to perform water quality testing, complete data, and furnish a technical report to demonstrate permitted water use complies with the regulatory standards of SWFWMD’s water use permit. The composite activities consisting of water sampling, testing, data analysis, and preparation of a 5 year technical summary report are assigned the term Hydro Biological Monitoring Plan (HBMP).</p>	
Priority:	Quality of Life	
Goal:	Meet all water quality standards (primary and secondary).	

Financial Information							
5 Year Plan	Total	Prior	FY 2022	FY 2023	FY 2024	FY 2025	FY 2026
Project Costs							
Planning							
Engineering	\$100,000	\$0	\$0	\$0	\$0	\$100,000	\$0
Construction							
Equipment							
Total	\$100,000	\$0	\$0	\$0	\$0	\$100,000	\$0
Funding Sources							
Local - UF	\$100,000	\$0	\$0	\$0	\$0	\$100,000	\$0
Impacts on Operations (negative entry indicates operating reduction)							
Personnel							
Contractual							
Equipment							
Other							

Dept/Div:	Utilities Administration	
Contact:	Chuck Pavlos	
Project Title:	Water Treatment Plant - Carbon Slurry System Replacement	
Project Code:	CARBON	
Account #:	411-8422-533-63-04	
Description/ Justification:	<p>FY 2025</p> <p>Design and construct replacement for existing Carbon Silo Tank for Powder Activated Carbon (PAC). A new tank is proposed as an improved method of storing and feeding PAC.</p> <p>The existing carbon silo system is programmed for replacement with an improved system.</p>	
Priority:	Infrastructure Sustainability	
Goal:	<p>Maintain and enhance the City's infrastructure to ensure efficient service delivery and quality aesthetic appeal.</p> <p>Apply best management practices and systems in infrastructure maintenance.</p>	

Financial Information							
5 Year Plan	Total	Prior	FY 2022	FY 2023	FY 2024	FY 2025	FY 2026
Project Costs							
Planning							
Design							
Construction							
Equipment							
Total	\$1,100,000	\$0	\$0	\$0	\$0	\$1,100,000	\$0
Funding Sources							
Local - UF	\$1,100,000	\$0	\$0	\$0	\$0	\$1,100,000	\$0
Impacts on Operations (negative entry indicates operating reduction)							
Personnel							
Contractual							
Equipment							
Other							

Dept/Div:	Utilities Administration	
Contact:	Chuck Pavlos	
Project Title:	Water Treatment Plant - Dewatering Sludge Press Replacement	
Project Code:	WPSLPR	
Account #:	411-8422-533-64-30	
Description/ Justification:	<p>FY 2022</p> <p>Project will consist of replacement of the existing sludge press.</p> <p>WTP purchased a refurbished 1989 Ashbrook 2.2 meter press in September, 2003. The de-watering sludge press is at its life expectancy and is programmed to be replaced.</p>	
Priority:	Infrastructure Sustainability	
Goal:	<p>Maintain and enhance the City's infrastructure to ensure efficient service delivery and quality aesthetic appeal.</p> <p>Apply best management practices and systems in infrastructure maintenance.</p>	

Financial Information							
5 Year Plan	Total	Prior	FY 2022	FY 2023	FY 2024	FY 2025	FY 2026
Project Costs							
Planning							
Design							
Construction							
Equipment	\$600,000	\$0	\$600,000	\$0	\$0	\$0	\$0
Total	\$600,000	\$0	\$600,000	\$0	\$0	\$0	\$0
Funding Sources							
Local - UF	\$600,000	\$0	\$600,000	\$0	\$0	\$0	\$0
Impacts on Operations (negative entry indicates operating reduction)							
Personnel							
Contractual							
Equipment							
Other							

Dept/Div:	Utilities Administration	
Contact:	Chuck Pavlos	
Project Title:	Water Treatment Plant – 2 MG Storage Tank Baffle Curtain Replacement	
Project Code:	WP2MGT	
Account #:	411-8422-533-65-02	
Description/ Justification:	<p>FY 2022</p> <p>Replace 3 baffle curtains due to deterioration and age.</p> <p>The 2 MG storage tank was placed into service in January 1996. Regulatory inspection of the tanks is performed every 5 years. Inspection of storage tank completed 8/5/20 identified 1 of the 3 baffle curtains to be in bad shape and the other 2 baffle curtains are approaching end of life.</p>	
Priority:	Infrastructure Sustainability	
Goal:	<p>Maintain and enhance the City's infrastructure to ensure efficient service delivery and quality aesthetic appeal.</p> <p>Apply best management practices and systems in infrastructure maintenance.</p>	

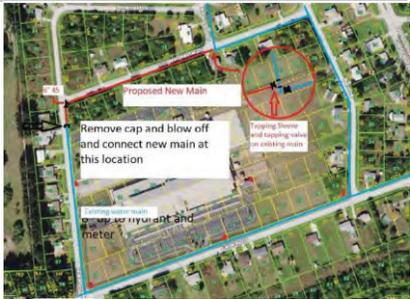
Financial Information							
5 Year Plan	Total	Prior	FY 2022	FY 2023	FY 2024	FY 2025	FY 2026
Project Costs							
Planning							
Design							
Construction							
Equipment	\$500,000	\$0	\$500,000	\$0	\$0	\$0	\$0
Total	\$500,000	\$0	\$500,000	\$0	\$0	\$0	\$0
Funding Sources							
Local - UF	\$500,000	\$0	\$500,000	\$0	\$0	\$0	\$0
Impacts on Operations (negative entry indicates operating reduction)							
Personnel							
Contractual							
Equipment							
Other							

Dept/Div:	Utilities Administration	
Contact:	Chuck Pavlos	
Project Title:	Taylor Rd 10" Water Main Replacement Upgrade	
Project Code:	TAYWMU	
Account #:	411-8423-533-63-21	
Description/Justification:	<p>FY 2021-2022</p> <p>Replace existing 10" Cast Iron water main with new 12" water main in Taylor Rd from Airport Rd to Alligator Creek Bridge.</p> <p>Wastewater impacts can be used up to 50% of project.</p> <p>The existing water main is cast iron and is over 50 years old and functionally obsolete. This line could be subject to end of life pipe condition resulting in repairs and interruption of service to customers.</p>	
Priority:	Infrastructure Sustainability	
Goal:	<p>Maintain and enhance the City's infrastructure to ensure efficient service delivery and quality aesthetic appeal.</p> <p>Apply best management practices and systems in infrastructure maintenance.</p>	

Financial Information							
5 Year Plan	Total	Prior	FY 2022	FY 2023	FY 2024	FY 2025	FY 2026
Project Costs							
Planning							
Design	\$250,000	\$250,000	\$0	\$0	\$0	\$0	\$0
Construction	\$3,000,000	\$3,000,000	\$0	\$0	\$0	\$0	\$0
Equipment							
Total	\$3,250,000	\$3,250,000	\$0	\$0	\$0	\$0	\$0
Funding Sources							
Local – UIF	\$975,000	\$975,000	\$0	\$0	\$0	\$0	\$0
Local – UF	\$2,275,000	\$2,275,000	\$0	\$0	\$0	\$0	\$0
Impacts on Operations (negative entry indicates operating reduction)							
Personnel							
Contractual							
Equipment							
Other							

Dept/Div:	Utilities Administration	
Contact:	Chuck Pavlos	
Project Title:	Solona Water Main Replacement Upgrade	
Project Code:	SOLWMMU	
Account #:	411-8423-533-63-21	
Description/Justification:	<p>FY 2024</p> <p>Replace existing 8" Cast Iron (CI) water main in Marion Avenue from Cooper Street to Florida Street.</p> <p>The existing water main is over 50 years old and is functionally obsolete. This line could be subject to end of life pipe condition resulting in repairs and interruption of service to customers.</p>	
Priority:	Infrastructure Sustainability	
Goal:	<p>Maintain and enhance the City's infrastructure to ensure efficient service delivery and quality aesthetic appeal.</p> <p>Apply best management practices and systems in infrastructure maintenance.</p>	

Financial Information							
5 Year Plan	Total	Prior	FY 2022	FY 2023	FY 2024	FY 2025	FY 2026
Project Costs							
Planning							
Design	\$200,000	\$200,000	\$0	\$0	\$0	\$0	\$0
Construction	\$3,000,000	\$0	\$0	\$0	\$3,000,000	\$0	\$0
Equipment							
Total	\$3,200,000	\$200,000	\$0	\$0	\$3,000,000	\$0	\$0
Funding Sources							
Local	\$3,200,000	\$200,000	\$0	\$0	\$3,000,000	\$0	\$0
Impacts on Operations (negative entry indicates operating reduction)							
Personnel							
Contractual							
Equipment							
Other							

Dept/Div:	Utilities Administration	
Contact:	Chuck Pavlos	
Project Title:	Water Main Extension Tee & Green	
Project Code:	WMT&G	
Account #:	411-8423-533-63-21	
Description/Justification:	<p>FY 2022</p> <p>Construct 6" water main in Tee and Green, Indian Creek Lane, Worcester Drive and Burning Tree Lane.</p> <p>Funded with Water Impacts.</p> <p>Project constructed in 1994 by City forces omitted water lines on three streets in Tee and Green. Existing homes and new construction will be able to become water customers. New water main will provide loop to 3 existing dead end lines providing growth and funding through impact fees.</p>	
Priority:	Infrastructure Sustainability	
Goal:	<p>Maintain and enhance the City's infrastructure to ensure efficient service delivery and quality aesthetic appeal.</p> <p>Apply best management practices and systems in infrastructure maintenance.</p>	

Financial Information							
5 Year Plan	Total	Prior	FY 2022	FY 2023	FY 2024	FY 2025	FY 2026
Project Costs							
Planning							
Design	\$50,000	\$50,000	\$0	\$0	\$0	\$0	\$0
Construction	\$200,000	\$0	\$200,000	\$0	\$0	\$0	\$0
Equipment							
Total	\$250,000	\$50,000	\$200,000	\$0	\$0	\$0	\$0
Funding Sources							
Local - UIF	\$250,000	\$50,000	\$200,000	\$0	\$0	\$0	\$0
Impacts on Operations (negative entry indicates operating reduction)							
Personnel							
Contractual							
Equipment							
Other- Maint	\$4,000	\$0	\$0	\$1,000	\$1,000	\$1,000	\$1,000
Impacts on Revenues (negative entry indicates revenue reduction)							
Water revenue – TBD as area is developed	TBD	\$0	\$0	TBD	TBD	TBD	TBD

Dept/Div:	Utilities Administration	
Contact:	Chuck Pavlos	
Project Title:	Bal Harbor Water Main Replacement Upgrade	
Project Code:	BALHWM	
Account #:	411-8423-533-63-21	
Description/Justification:	<p>FY 2026</p> <p>Water Distribution has investigated low pressure calls from PGI Section 12 and 14. The water main between Aquista and Albatross is 10". This line segment is causing significant pressure drop. Install a larger pipe to correct low pressure events.</p> <p>This will improve operation of water distribution facilities.</p>	
Priority:	Infrastructure Sustainability	
Goal:	<p>Maintain and enhance the City's infrastructure to ensure efficient service delivery and quality aesthetic appeal.</p> <p>Apply best management practices and systems in infrastructure maintenance.</p>	

Financial Information							
5 Year Plan	Total	Prior	FY 2022	FY 2023	FY 2024	FY 2025	FY 2026
Project Costs							
Planning							
Design	\$120,000	\$0	\$0	\$0	\$0	\$0	\$120,000
Construction	\$480,000	\$0	\$0	\$0	\$0	\$0	\$480,000
Equipment							
Total	\$600,000	\$0	\$0	\$0	\$0	\$0	\$600,000
Funding Sources							
Local - UF	\$600,000	\$0	\$0	\$0	\$0	\$0	\$600,000
Impacts on Operations (negative entry indicates operating reduction)							
Personnel							
Contractual							
Equipment							
Other							

**GENERAL CONSTRUCTION FUND
CAPITAL IMPROVEMENTS PROGRAM
FY 2022 - FY 2026
(All figures in thousands of dollars)**

PROJECT IDENTIFICATION	Page#	TOTAL PROJECT COST	Prior Years' Funding*	FY 2022	FY 2023	FY 2024	FY 2025	FY 2026
GENERAL FUNDING:								
National Pollutant Discharge Elimination System	36	180	80	20	20	20	20	20
Storm Sewer Reconstruction	37	528	153	75	75	75	75	75
Bridge Repair	38	68	18	10	10	10	10	10
Drainage Improvements	39	3,054	2,054	200	200	200	200	200
Laishley Park Playground & Interactive Fountain	40	325	50	0	0	0	0	0
Harborwalk Wooden Pathways & Pier Pilings	41	784	284	100	100	100	100	100
Channel and Basin Dredging at Boat Club Area	42	175	0	22	**	0	0	0
King Street Improvements	43	160	0	**	32	0	0	0
Railroad Crossing Rehabilitation	44	980	0	250	220	275	235	0
GENERAL FUNDING TOTAL				677	657	680	640	405
GRANT FUNDING:								
US 41 Complete Street - Airport to Carmalita (plus \$349,000 1% ST)	69	3,410	150	2,911	**	0	0	0
Drainage Improvements - Boca Grande Area	78	5,158	**	1,000	**	0	0	0
GRANT FUNDING TOTAL				3,911	0	0	0	0
PARK IMPACTS:								
Park Improvements	45	1,010	285	145	145	145	145	145
PARK IMPACTS TOTAL				145	145	145	145	145
MOBILITY IMPACTS (previously Transportation):								
Sidewalk Improvements	46	462	222	0	0	60	130	130
King Street Improvements	43	160	0	80	48	0	0	0
Complete Street - Airport Road Improvements	68	1,786	**	100	100	50	0	0
MOBILITY IMPACTS TOTAL				180	148	110	130	130
PUBLIC SAFETY IMPACTS:								
Public Safety Building Expansion	82	5,591	0	0	0	**	550	450
PUBLIC SAFETY IMPACTS TOTAL				0	0	0	550	450
SPECIAL USE FUND:								
Ponce de Leon Park Improvements	67	2,995	700	0	**	**	**	0
SPECIAL USE FUND TOTAL				0	0	0	0	0
TOTAL FUNDED PROJECTS				4,913	950	935	1,465	1,130

* Prior Years' funding is included for projects that have additional funding FY 22-26 or may not be complete at 9/30/21

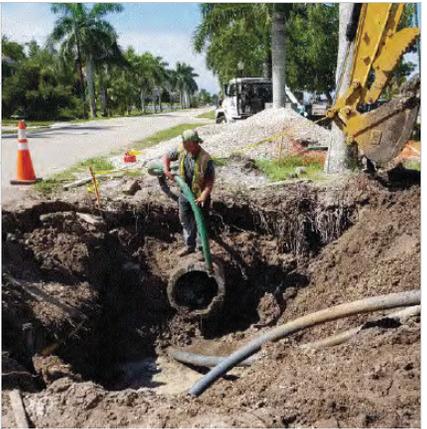
** Funding from another source - See CIP detail sheet

PROJECTS WITHIN CITY BOUNDARIES SCHEDULED BY OTHER AGENCIES

US 41 @ Carmalita St Extension

Dept/Div:	Public Works	
Contact:	Rick Keeney	
Project Title:	National Pollutant Discharge Elimination System	
Project Code:	NPDES	
Account #:	301-3004-538-6326	
Description/Justification:	<p>Requirements related to Federal Clean Water Act for Stormwater:</p> <ul style="list-style-type: none"> *Public Education, *Public Involvement, *Illicit Discharge & Connection Elimination, *Construction Site Run-Off Control, *Post Construction Stormwater Management, *Pollution Prevention, *Total Maximum Daily Loads (TMDL) <p>Carryover unspent funds.</p> <p>Federal Mandate.</p>	
Priority:	Infrastructure Sustainability, Quality of Life	
Goal:	Maintain and enhance the City’s infrastructure to ensure efficient and effective service delivery and quality aesthetic appeal. Achieve status as a waterfront destination for land and water visitors through implementing selected recommendations in the 2019 PLAN Punta Gorda Citywide Master Plan over the next five years.	

Financial Information							
5 Year Plan	Total	Prior	FY 2022	FY 2023	FY 2024	FY 2025	FY 2026
Project Costs							
Planning							
Design							
Construction	\$179,722	\$79,722	\$20,000	\$20,000	\$20,000	\$20,000	\$20,000
Equipment							
Total	\$179,722	\$79,722	\$20,000	\$20,000	\$20,000	\$20,000	\$20,000
Funding Sources							
Local-GF	\$179,722	\$79,722	\$20,000	\$20,000	\$20,000	\$20,000	\$20,000
Impacts on Additional Capital needs (negative entry indicates operating reduction)							
Contractual-Storm Sewer Reconstruction	\$528,224	\$153,224	\$75,000	\$75,000	\$75,000	\$75,000	\$75,000

Dept/Div:	Public Works	
Contact:	Rick Keeney	
Project Title:	Storm Sewer Reconstruction	
Project Code:	STSWRC	
Account #:	301-3004-538-6375	
Description/ Justification:	<p>Storm drainage pipe lining or replacement of defective pipe.</p> <p>Carryover funds unspent.</p> <p>To repair or replace pipe which has deteriorated or collapsed due to age. These pipes carry the stormwater from the streets and right-of-ways.</p>	
Priority:	Infrastructure Sustainability, Quality of Life	
Goal:	<p>Maintain and enhance the City’s infrastructure to ensure efficient and effective service delivery and quality aesthetic appeal. Apply best management practices & systems in infrastructure maintenance. Establish a five-year capital improvements program that ensures infrastructure is in place to meet projected growth demands and update the plan on an annual basis. Maintain the City's high safety rating, emergency response, and storm preparedness.</p>	

Financial Information							
5 Year Plan	Total	Prior	FY 2022	FY 2023	FY 2024	FY 2025	FY 2026
Project Costs							
Planning							
Design							
Construction	\$528,224	\$153,224	\$75,000	\$75,000	\$75,000	\$75,000	\$75,000
Equipment							
Total	\$528,224	\$153,224	\$75,000	\$75,000	\$75,000	\$75,000	\$75,000
Funding Sources							
Local-GF	\$528,224	\$153,224	\$75,000	\$75,000	\$75,000	\$75,000	\$75,000
Impacts on Operations (negative entry indicates operating reduction)							
Personnel							
Contractual							
Equipment							
Other							

Dept/Div:	Public Works	
Contact:	Rick Keeney	
Project Title:	Bridge Repair	
Project Code:	TBD	
Account #:	301-3004-541-6392	
Description/Justification:	<p>Bridge repairs resulting from FDOT bridge inspections.</p> <p>Three bridge repairs in Punta Gorda Isles.</p> <p>One bridge on Aqui Esta Drive.</p> <p>Carryover unspent funds.</p> <p>Funding provides for the repair and maintenance needed to keep City bridges in a safe and functional condition.</p>	
Priority:	Infrastructure Sustainability	
Goal:	Maintain and enhance the City's infrastructure to ensure efficient and effective service delivery and quality aesthetic appeal. Apply best management practices & systems in infrastructure maintenance.	

Financial Information							
5 Year Plan	Total	Prior	FY 2022	FY 2023	FY 2024	FY 2025	FY 2026
Project Costs							
Planning							
Design							
Construction	\$68,319	\$18,319	\$10,000	\$10,000	\$10,000	\$10,000	\$10,000
Equipment							
Total	\$68,319	\$18,319	\$10,000	\$10,000	\$10,000	\$10,000	\$10,000
Funding Sources							
Local-GF	\$68,319	\$18,319	\$10,000	\$10,000	\$10,000	\$10,000	\$10,000
Impacts on Operations (negative entry indicates operating reduction)							
Personnel							
Contractual							
Equipment							
Other							

Dept/Div:	Public Works	
Contact:	Rick Keeney	
Project Title:	Drainage Improvements	
Project Code:	DRAI22	
Account #:	301-3004-541-6320	
Description/ Justification:	<p>Construction for City-wide regrading of drainage swales, based on video observations of standing water after 72 hours. This is an on-going project.</p> <p>FY 2022 - 2026: \$1,000,000 General Fund</p> <p>Maintain defined level of service which requires that water not stand in swales more than 72 hours following last rainfall.</p>	
Priority:	Infrastructure Sustainability	
Goal:	<p>To ensure efficient and effective service delivery and quality aesthetic appeal. Apply best management practices & systems in infrastructure maintenance. Establish a five-year capital improvements program that ensures infrastructure is in place to meet projected growth demands and update the plan on an annual basis.</p>	

Financial Information							
5 Year Plan	Total	Prior	FY 2022	FY 2023	FY 2024	FY 2025	FY 2026
Project Costs							
Planning							
Design							
Construction	\$3,053,630	\$2,053,630	\$200,000	\$200,000	\$200,000	\$200,000	\$200,000
Equipment							
Total	\$3,053,630	\$2,053,630	\$200,000	\$200,000	\$200,000	\$200,000	\$200,000
Funding Sources							
Local-GF	\$3,053,630	\$2,053,630	\$200,000	\$200,000	\$200,000	\$200,000	\$200,000
Impacts on Operations (negative entry indicates operating reduction)							
Personnel							
Contractual							
Equipment							
Other							

Dept/Div:	City Manager/Urban Design/Public Works	 
Contact:	Joan LeBeau/Rick Keeney	
Project Title:	Lashley Park Playground and Interactive Fountain	
Project Code:	LPPLAY	
Account #:	301-3004-541-6377/110-3000-559-6312	
Description/Justification:	<p>FY 2021-2022: Design & install new playground equipment and surfacing; enhancements to the interactive fountain to provide additional play elements; and replacement (as necessary) of the existing fountain pump and filtration system.</p> <p>Planning Estimates – Total \$325,000: Design & Install Playground - \$100,000 Fountain Enhancements - \$75,000 Pump & Filtration System - \$150,000</p> <p>Funding: General Fund \$50,000; CRA Fund utilizing operating division funds set aside for repair & maintenance \$275,000.</p> <p>Replacement and enhancement of park amenities to provide an increased level of recreational level of service for all.</p>	
Priority:	Infrastructure Sustainability	
Goal:	Maintain and enhance the City's infrastructure to ensure efficient and effective service delivery and quality aesthetic appeal.	

Financial Information							
5 Year Plan	Total	Prior	FY 2022	FY 2023	FY 2024	FY 2025	FY 2026
Project Costs							
Planning							
Design	\$33,000	\$33,000	\$0	\$0	\$0	\$0	\$0
Construction	\$292,000	\$292,000	\$0	\$0	\$0	\$0	\$0
Equipment							
Total	\$325,000	\$325,000	\$0	\$0	\$0	\$0	\$0
Funding Sources							
Local-GF	\$50,000	\$50,000	\$0	\$0	\$0	\$0	\$0
Local-OF	\$275,000	\$275,000	\$0	\$0	\$0	\$0	\$0
Impacts on Operations (negative entry indicates operating reduction)							
Chemicals, water, electric, maintenance	\$80,000	\$0	\$0	\$20,000	\$20,000	\$20,000	\$20,000

Dept/Div:	Public Works	
Contact:	Rick Keeney	
Project Title:	Wooden Pathways and Pier Pilings	
Project Code:	PIERPJ	
Account #:	301-3004-519-6300	
Description/Justification:	<p>City's wooden boardwalks and pier pilings have deteriorated over the years and need to be replaced as needed. A contractor will install grout filled pile jackets for many of the piers.</p> <p>FY 2020-2022: \$140,000 toward Ponce Park boardwalk and pier.</p> <p>FY 2021: Replace wooden dock and handrails with composite at Gilchrist Park.</p> <p>FY 2022-2026: Replace wooden dock and handrails with composite along City waterfront areas.</p> <p>Carryover funds unspent.</p> <p>These are necessary repairs and replacements for City's infrastructure sustainability of the Harborwalk and other wooden pathways throughout our parks.</p>	
Priority:	Infrastructure Sustainability	
Goal:	Maintain and enhance the City's infrastructure to ensure efficient and effective service delivery and quality aesthetic appeal. Apply best management practices & systems in infrastructure maintenance.	

Financial Information							
5 Year Plan	Total	Prior	FY 2022	FY 2023	FY 2024	FY 2025	FY 2026
Project Costs							
Planning							
Design							
Construction	\$783,869	\$283,869	\$100,000	\$100,000	\$100,000	\$100,000	\$100,000
Equipment							
Total	\$783,869	\$283,869	\$100,000	\$100,000	\$100,000	\$100,000	\$100,000
Funding Sources							
Local-GF	\$783,869	\$283,869	\$100,000	\$100,000	\$100,000	\$100,000	\$100,000
Impacts on Operations (negative entry indicates operating reduction)							
Personnel							
Contractual							
Equipment							
Other							

Dept/Div:	Public Works	
Contact:	Rick Keeney	
Project Title:	Channel and Basin Dredging at Boat Club Area	
Project Code:	BCDRDG	
Account #:	301-3004-572-6359	
Description/Justification:	<p>Engage consultant to obtain permitting for maintenance dredging the Boat Club channel and basin. Perform dredging and repair dock.</p> <p>FY 2022: General Fund Repair Dock: \$12,000 Engineering: \$10,000</p> <p>FY 2023: UNFUNDED Construction, dredge basin and channel: \$153,000 Apply for MAC Grant funding during FY 2022</p> <p>The channel and basin have silted in which limits access to the public, boating, and sailing club. The dock is in need of repairs.</p>	
Priority:	Infrastructure Sustainability, Quality of Life	
Goal:	To ensure efficient and effective service delivery and quality aesthetic appeal. Apply best management practices and systems in infrastructure maintenance. Establish a five-year capital improvements program that ensures infrastructure is in place to meet projected growth demands and update the plan on an annual basis. Achieve status as a waterfront destination for land and water visitors through implementing selected recommendations in the 2019 Punta Gorda Citywide Master Plan over the next five years.	

Financial Information							
5 Year Plan	Total	Prior	FY 2022	FY 2023	FY 2024	FY 2025	FY 2026
Project Costs							
Planning							
Design	\$10,000	\$0	\$10,000	\$0	\$0	\$0	\$0
Construction	\$165,000	\$0	\$12,000	\$153,000	\$0	\$0	\$0
Equipment							
Total	\$175,000	\$0	\$22,000	\$153,000	\$0	\$0	\$0
Funding Sources							
Local-GF	\$22,000	\$0	\$22,000	\$0	\$0	\$0	\$0
UNFUNDED-G	TBD	\$0	\$0	TBD	\$0	\$0	\$0
Impacts on Operations (negative entry indicates operating reduction)							
Personnel							
Contractual							
Equipment							
Other							

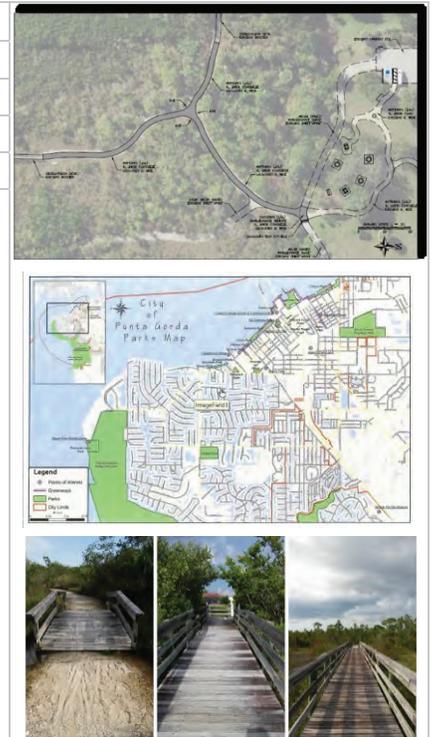
Dept/Div:	Public Works	
Contact:	Rick Keeney	
Project Title:	King Street Improvements	
Project Code:	KINGIM	
Account #:	301-3005-541-6394 / 301-3004-541-6394	
Description/ Justification:	<p>Design and construction of King Street due to growth and safety concerns.</p> <p>FY 2022-2023: Construction \$80,000 per year</p> <p>Funding: General Fund 20% - \$32,000 Mobility Impact Fees 80% - \$128,000</p> <p>Necessary repairs needed to enhance existing infrastructure including street resurfacing, drainage, lighting, and safety concerns.</p>	
Priority:	Infrastructure Sustainability, Quality of Life	
Goal:	To ensure efficient and effective service delivery and quality aesthetic appeal. Apply best management practices & systems in infrastructure maintenance. Apply best management practices and systems in infrastructure maintenance. Maintain the City's high safety rating, emergency response, and storm preparedness.	

Financial Information							
5 Year Plan	Total	Prior	FY 2022	FY 2023	FY 2024	FY 2025	FY 2026
Project Costs							
Planning							
Design							
Construction	\$160,000	\$0	\$80,000	\$80,000	\$0	\$0	\$0
Equipment							
Total	\$160,000	\$0	\$80,000	\$80,000	\$0	\$0	\$0
Funding Sources							
Local-GF	\$32,000	\$0	\$0	\$32,000	\$0	\$0	\$0
Local-FSIF	\$128,000	\$0	\$80,000	\$48,000	\$0	\$0	\$0
Impacts on Operations (negative entry indicates operating reduction)							
Personnel							
Contractual							
Equipment							
Maintenance and electric	\$3,000	\$0	\$0	\$0	\$1,000	\$1,000	\$1,000

Dept/Div:	Public Works	
Contact:	Rick Keeney	
Project Title:	Railroad Crossing Rehabilitation	
Project Code:	RRREHB	
Account #:	301-3004-541-6328	
Description/Justification:	<p>Rehabilitation improvements to maintain existing railroad crossings.</p> <p>Estimates: FY 2022: McKenzie Street crossing and sidewalk \$250,000. FY 2023: Ann Street crossing \$220,000 (no sidewalk). FY 2024: Elizabeth Street crossing and sidewalk \$275,000. FY 2025: Boca Grande crossing \$235,000 (no sidewalk).</p> <p>Note: The quotes provided by Seminole Gulf Railway, L.P. are valid until October 4, 2021. After October the rates could increase.</p> <p>Mandatory rehabilitation of the road and sidewalk crossing involved, with the participation of the City of Punta Gorda and pursuant to the General Agreement with Seminole Gulf Railway, L.P. dated November 15, 2020.</p>	
Priority:	Infrastructure Sustainability, Quality of Life	
Goal:	To ensure efficient and effective service delivery and quality aesthetic appeal. Apply best management practices & systems in infrastructure maintenance. Maintain the City's high safety rating, emergency response and storm preparedness.	

Financial Information							
5 Year Plan	Total	Prior	FY 2022	FY 2023	FY 2024	FY 2025	FY 2026
Project Costs							
Planning							
Design							
Construction	\$980,000	\$0	\$250,000	\$220,000	\$275,000	\$235,000	\$0
Equipment							
Total	\$980,000	\$0	\$250,000	\$220,000	\$275,000	\$235,000	\$0
Funding Sources							
Local-GF	\$980,000	\$0	\$250,000	\$220,000	\$275,000	\$235,000	\$0
Impacts on Operations (negative entry indicates operating reduction)							
Personnel							
Contractual							
Equipment							
Other							

Dept/Div:	City Manager/Urban Design
Contact:	Joan LeBeau
Project Title:	Park Improvements - Citywide
Project Code:	Various
Account #:	301-3004-572-6332
Description/Justification:	<p>FY 2021-2022: Nature Park – Phase I and II Engineering being completed with CityWide ADA Transition Plan.</p> <p>FY 2022-2023: Construction Phase I - Nature Park Trail Improve and repair nature trail including fish pier, boardwalk, drainage and ADA - Planning Estimate: \$350,000</p> <p>FY 2023-2024: Construction Phase II- Nature Park Trail Improve and repair nature trail including fish pier, drainage, and ADA - Planning Estimate: \$350,000</p> <p>FY 2024-2026: Future improvements to be determined by park need(s). Projects could include Nature Park Phase II, Henry St property improvements, Ponce de Leon additional facilities, Trabue Park improvements, Veterans Park improvements, Laishley Park improvements, or other growth related park improvements.</p> <p>Funding – Park Impact Fees.</p> <p>Park improvements funded for growth related improvements.</p>
Priority:	Infrastructure Sustainability, Quality of Life
Goal:	Maintain and enhance the City's infrastructure to ensure efficient and effective service delivery and quality aesthetic appeal. Apply best management practices and systems in infrastructure maintenance. Establish a long-range plan that ensures infrastructure is in place to meet projected growth demands. Support, promote and maintain the City's historic character.



Financial Information							
5 Year Plan	Total	Prior	FY 2022	FY 2023	FY 2024	FY 2025	FY 2026
Project Costs							
Design							
Construction	\$1,009,806	\$284,806	\$145,000	\$145,000	\$145,000	\$145,000	\$145,000
Equipment							
Total	\$1,009,806	\$284,806	\$145,000	\$145,000	\$145,000	\$145,000	\$145,000
Funding Sources							
Local-FSIF	\$1,009,806	\$284,806	\$145,000	\$145,000	\$145,000	\$145,000	\$145,000
Impacts on Operations (negative entry indicates operating reduction)							
Personnel							
Contractual							
Equipment							
Repair and maintenance	\$12,500	\$0	\$0	\$0	\$2,500	\$5,000	\$5,000

Dept/Div:	Public Works	
Contact:	Rick Keeney	
Project Title:	Sidewalk Improvements	
Project Code:	TBD	
Account #:	301-3004-541-6319	
Description/Justification:	<p>Construction of additional sidewalks throughout the City, providing for safe pedestrian traffic. City staff has completed a survey of all sidewalks within the City and is making arrangements to include necessary ADA improvements. Staff is proposing to use the funding each year to make connections between existing discontinuous sidewalk facilities.</p> <p>Projects may also include: King Street improvements, West Henry Street improvements or connections, Historic District infrastructure, Various Complete Street Improvements (Airport Rd, Cooper St, Shreve St, Virginia Ave), Harborwalk US 41 NB Bridger Underpass, Harborwalk East Phase II, Alligator Creek US 41NB Pedestrian Bridge II or other priority growth related mobility projects.</p> <p>To provide a safe access for pedestrians and school children along heavily used routes, in conjunction with state policies and the City's Comprehensive Plan. To provide assistance with growth of King Street, West Henry Street and Airport Rd.</p>	
Priority:	Infrastructure Sustainability & Quality of Life	
Goal:	Maintain and enhance the City's infrastructure to ensure efficient and effective service delivery and quality aesthetic appeal. Apply best management practices & systems in infrastructure maintenance. Establish a five-year capital improvements program that ensures infrastructure is in place to meet projected growth demands. Support and promote a pedestrian and bicycle friendly community.	

Financial Information							
5 Year Plan	Total	Prior	FY 2022	FY 2023	FY 2024	FY 2025	FY 2026
Project Costs							
Planning							
Design	\$50,000	\$0	\$0	\$0	\$17,000	\$17,000	\$16,000
Construction	\$492,481	\$222,481	\$0	\$0	\$43,000	\$113,000	\$114,000
Equipment							
Total	\$542,481	\$222,481	\$0	\$0	\$60,000	\$130,000	\$130,000
Funding Sources							
Local-FSIF	\$542,481	\$222,481	\$0	\$0	\$60,000	\$130,000	\$130,000
Impacts on Operations (negative entry indicates operating reduction)							
Personnel							
Contractual							
R&M	\$2,000	\$0	\$0	\$0	\$0	\$1,000	\$1,000

**UNFUNDED PROJECTS
CAPITAL IMPROVEMENTS PROGRAM
FY 2022 - FY 2026
(All figures in thousands of dollars)**

SOURCE OF FUNDING UNIDENTIFIED PROJECT IDENTIFICATION	Page#	TOTAL REQUESTED FUNDING (UNFUNDED)	APPLY FOR GRANT
<i>Only unfunded portion for partially funded projects:</i>			
Ponce de Leon Park Improvements	67	1,850	
Complete Street - Airport Rd Improvements	68	186	
Harborwalk - US 41 Bridge Approach Lighting	72	280	
Historic City Hall Preservation and Rehabilitation	76	512	
Freeman House Preservation	74	863	Yes
Henry St Property Improvements	77	1,000	
Drainage Improvements - Boca Grande Area	78	1,006	Yes
Historic District Infrastructure	83	1,250	Yes
Bayfront Activity Center	81	104	
Complete Street - US 17 Improvements	86	2,500	Yes
Traffic Signal - Burnt Store Rd and Home Depot	87	1,100	
Complete St - Cooper Street Improvements	85	3,307	
Channel and Basin Dredging at Boat Club Area	42	153	Yes
<i>Fully unfunded projects:</i>			
Unimproved Alleyway	48	750	
Baynard/Vasco Sidewalk Improvements	49	400	
Harborwalk East - Phase II	50	1,500	
Bicycle Capital Improvement Program	51	1,200	
Sidewalk Connections W Marion: Bal Harbor to Shreve Street	52	1,500	
Harborwalk - US 41 NB Bridge Underpass Improvements	53	200	
Virginia Ave Complete St Improvements - Harvey St. to US 41	54	800	
Maud Street Angled Parking	55	275	
Royal Poinciana Improvements Complete St	56	2,500	
Tropicana & Marion Sidewalk Enhancement	57	300	
Historic District Street Lights	58	550	
Gilchrist Park - Harborwalk Improvements (Seating and Shade)	59	350	
Historic District Interpretation Markers	60	500	
Harborwalk - Laishley Park Marriage Point	61	750	
Veteran's Park Shade Structure	62	350	
Trabue Park Improvements	63	1,250	
South Punta Gorda Park (Firestation 2)	64	1,000	
Harborwalk West - Area 3	65	1,800	
PROJECT CATEGORY - UNFUNDED TOTAL		30,086	

Dept/Div:	Public Works	
Contact:	Rick Keeney	
Project Title:	Unimproved Alleyway	
Project Code:	TBD	
Account #:	TBD	
Description/ Justification:	<p>Make necessary improvements to alleyways as needed due to growth and development along unimproved alleyways.</p> <p>Requested \$150,000 per year - UNFUNDED</p> <p>Necessary repairs to provide safe access and drainage to homes.</p>	
Priority:	Infrastructure Sustainability	
Goal:	Maintain and enhance the City’s infrastructure to ensure efficient and effective service delivery and quality aesthetic appeal. Apply best management practices and systems in infrastructure maintenance.	

Financial Information							
5 Year Plan	Total	Prior	FY 2022	FY 2023	FY 2024	FY 2025	FY 2026
Project Costs							
Planning							
Design	\$150,000						
Construction	\$600,000						
Equipment							
Total	\$750,000						
Funding Sources							
UNFUNDED	TBD						
Impacts on Operations (negative entry indicates operating reduction)							
Personnel							
Contractual							
Equipment							
Other							

Dept/Div:	City Manager / Urban Design
Contact:	Joan LeBeau
Project Title:	Baynard/Vasco Sidewalk Improvements
Project Code:	BAYVAS
Account #:	TBD
Description/Justification:	<p>This is a 2 year project.</p> <p>Design and construct missing sidewalk connection at Shreve St from Pompano Road to Vasco St and along Baynard from Vasco to Aqui Esta.</p> <p>Planning Estimates – Total \$400,000: Design & Permitting - \$75,000 Construction - \$300,000 Contingency - \$25,000</p> <p>\$400,000 UNFUNDED</p> <p>This is a needed sidewalk with a portion of it completed. The completion of the missing sections will safely connect the residential community to the commercial section providing access to a variety of destination points as well as a safe route to commercial, retail, and other areas.</p>
Priority:	Infrastructure Sustainability
Goal:	Complete the 18-mile pedestrian/bicycle pathway connecting all neighborhoods through collaboration with applicable granting agencies and City investment in pathways by June 2022.



Financial Information							
5 Year Plan	Total	Prior	FY 2022	FY 2023	FY 2024	FY 2025	FY 2026
Project Costs							
Planning							
Design	\$75,000						
Construction	\$325,000						
Equipment							
Total	\$400,000						
Funding Sources							
UNFUNDED	TBD						
Impacts on Operations (negative entry indicates operating reduction)							
Mowing, maint and electric \$1,000 per year							

Dept/Div:	City Manager/Urban Design
Contact:	Joan LeBeau
Project Title:	Harborwalk East - Phase II
Project Code:	TBD
Account #:	TBD
Description/Justification:	<p>Expected two years to complete.</p> <p>Design and Engineering: includes environmental and permitting, along Harborwalk gap from Adrienne Avenue to Cooper Street to include landscape, decorative lighting and wayfinding signage; approximately 700 feet. Then construct.</p> <p>Cost estimated pending design and schedule of values – Total \$1,500,000: Design & Permitting - \$400,000 Construction - \$1,000,000 Permit/Contingency - \$100,000</p> <p>Note: City is looking for environmental grants to supplement funding.</p> <p>A critical link to complete a gap between the existing Harborwalk and the proposed Cooper Street pathway. Punta Gorda Pathways provides access to a variety of destination points as well as a safe route to commercial, medical, retail, historic, and downtown areas of Punta Gorda. Completion will contribute to the City's urban mobility, and help to create a strong viable community.</p>
Priority:	Infrastructure Sustainability
Goal:	Complete the 18-mile pedestrian/bicycle pathway connecting all neighborhoods through collaboration with applicable granting agencies and City investment in pathways by June 2022.



Financial Information							
5 Year Plan	Total	Prior	FY 2022	FY 2023	FY 2024	FY 2025	FY 2026
Project Costs							
Planning							
Design	\$400,000						
Construction	\$1,100,000						
Equipment							
Total	\$1,500,000						
Funding Sources							
UNFUNDED	TBD						
Impacts on Operations (negative entry indicates operating reduction)							
Maint, electric, irrigation \$5,000 annually							

Dept/Div:	City Manager/Urban Design
Contact:	Joan LeBeau
Project Title:	Bicycle Capital Improvement Program
Project Code:	TBD
Account #:	TBD
Description/Justification:	<p>This is a two year project that can be broken into segments.</p> <p>Project study to review the 2019 Transportation Study, 2019 Plan Punta Gorda - Citywide Master Plan, and 2020 Park and Recreation Master Plan to prepare an implementation plan for the City's Vision of creating a well-connected network of bicycle infrastructure.</p> <p>Improvements which may include, but not be limited to, signage, sharrows, pavement markings, and bicycle facilities.</p> <p>Project implements the City of Punta Gorda and the Florida Department of Transportation Complete Streets policies. It also details items identified in Transportation Element of the City's 2040 Comprehensive Plan and Plan Punta Gorda 2019 Citywide Master Plan creating a basic bicycle network that links larger City neighborhoods and commercial nodes together to spur private in key growth areas.</p>
Priority:	Infrastructure Sustainability
Goal:	Establish a five-year capital improvements program that ensures infrastructure is in place to meet projected growth demands and update the plan on an annual basis. Support and promote a pedestrian and bicycle friendly community through implementing selected recommendations in the 2019 PLAN Punta Gorda Citywide Master Plan over the next five years.



Financial Information							
5 Year Plan	Total	Prior	FY 2022	FY 2023	FY 2024	FY 2025	FY 2026
Project Costs							
Planning							
Design	\$200,000						
Construction	\$1,000,000						
Equipment							
Total	\$1,200,000						
Funding Sources							
UNFUNDED	TBD						
Impacts on Operations (negative entry indicates operating reduction)							
Routine maintenance \$3,000 annually							

Dept/Div:	City Manager/Urban Design
Contact:	Joan LeBeau
Project Title:	Sidewalk Connections W Marion: Bal Harbor to Shreve
Project Code:	TBD
Account #:	TBD
Description/Justification:	<p>This is a 2-3-year project.</p> <p>Design preliminary concept plan for a sidewalk replacement and intersection treatments along the South side of W Marion Ave, from Bal Harbor to W Henry St, and W Henry to Shreve St, followed by design engineering, permitting, and land/easement acquisition(s) and construction.</p> <p>Planning Estimates – Total \$1,500,000: Design & Permitting - \$350,000, Land/Easements- \$150,000, Construction - \$800,000, Contingency - \$200,000</p> <p>Funding: \$1,500,000 UNFUNDED</p> <p>This implements the City's Transportation Element of the 2040 Comprehensive Plan to provide a level of service for all users by enhancing pedestrian safety and connectivity. This project is intended to create better and safer connections between the Punta Gorda Isles neighborhood and the Historic District within Fishermen’s Village area.</p>
Priority:	Infrastructure Sustainability, Quality of Life
Goal:	Maintain and enhance the City’s infrastructure to ensure efficient and effective service delivery and quality aesthetic appeal. Support and promote a pedestrian and bicycle friendly community through implementing selected recommendations in the 2019 PLAN Punta Gorda Citywide Master Plan over the next five years.



Financial Information							
5 Year Plan	Total	Prior	FY 2022	FY 2023	FY 2024	FY 2025	FY 2026
Project Costs							
Land	\$150,000						
Design	\$350,000						
Construction	\$1,000,000						
Equipment							
Total	\$1,500,000						
Funding Sources							
UNFUNDED	TBD						
Impacts on Operations (negative entry indicates operating reduction)							
Maintenance, irrigation \$1,500 annually							

Dept/Div:	City Manager/Urban Design
Contact:	Joan LeBeau
Project Title:	Harborwalk - US 41 NB Bridge Underpass Improvements
Project Code:	TBD
Account #:	TBD
Description/Justification:	<p>This is a two year project.</p> <p>Design and construction of improvements to Harborwalk underpass at US 41NB (Tamiami Trail) bridge, including lighting.</p> <p>Planning Estimates – Total \$200,000: Design - \$30,000, Construction - \$150,000, Permit - \$5,000, Engineering \$5,000, Contingency - \$10,000.</p> <p>Funding: \$30,000 UNFUNDED; \$170,000 Grant UNFUNDED.</p> <p>This project will increase the level of service at this existing pinch point in the Harborwalk portion of the Punta Gorda Pathways. In addition to widening the pathway this project will also improve site lighting to enhance security and safety of the path.</p>
Priority:	Infrastructure Sustainability, Quality of Life
Goal:	Maintain and enhance the City’s infrastructure to ensure efficient and effective service delivery and quality aesthetic appeal. Support and promote a pedestrian and bicycle friendly community through implementing selected recommendations in the 2019 PLAN Punta Gorda Citywide Master Plan over the next five years.



Financial Information							
5 Year Plan	Total	Prior	FY 2022	FY 2023	FY 2024	FY 2025	FY 2026
Project Costs							
Planning							
Design	\$30,000						
Construction	\$170,000						
Equipment							
Total	\$200,000						
Funding Sources							
UNFUNDED	TBD						
Impacts on Operations (negative entry indicates operating reduction)							
Mowing, maint, electric \$1,000 annually	1,000						

Dept/Div:	City Manager/Urban Design	
Contact:	Joan LeBeau	
Project Title:	Complete Street - Virginia Avenue Improvements – Harvey St to US 41	
Project Code:	VIRCOM	
Account #:	118-3007-541-6519	
Description/Justification:	<p>This is a 2-3 year project. Design and construct Street improvements on Virginia Avenue from Harvey Street to US 41 improving existing sidewalks filling in gaps, increasing width throughout downtown, providing decorative crosswalks, parking, lighting, and trees.</p> <p>Planning Estimates – Total \$800,000: Design & Survey \$150,000, Construction - \$550,000, Permit - \$8,000, Engineering Services \$5,000, Contingency - \$87,000</p> <p>Funding: \$800,000 UNFUNDED</p> <p>This is an internal continuation of the Punta Gorda Pathway project. The addition of this section will safely connect the residential community to the commercial section providing access to a variety of destination points as well as a safe route to commercial, retail & other areas.</p>	
Priority:	Infrastructure Sustainability	
Goal:	Complete the 18-mile pedestrian/bicycle pathway connecting all neighborhoods through collaboration with applicable granting agencies and City investment in pathways by June 2022. Maintain and enhance the City’s infrastructure to ensure efficient and effective service.	

Financial Information							
5 Year Plan	Total	Prior	FY 2022	FY 2023	FY 2024	FY 2025	FY 2026
Project Costs							
Planning							
Design	\$150,000						
Construction	\$650,000						
Equipment							
Total	\$800,000						
Funding Sources							
UNFUNDED	TBD						
Impacts on Operations (negative entry indicates operating reduction)							
Maintenance and electric \$5,000 annually							

Dept/Div:	City Manager/Urban Design/Public Works
Contact:	Joan LeBeau / Rick Keeney
Project Title:	Maud Street Angled Parking
Project Code:	TBD
Account #:	TBD
Description/Justification:	<p>Maud Street, adjacent to the Visual Arts Center (VAC) and across from Fishermen's Village, offers an opportunity to provide additional parking in a concentrated business area. The project requires engineering and planning for final numbers; however, preliminary conservative observations indicate the potential for 35 or more angled brick paver parking spaces along Maud Street. This will alleviate parking congestion and promote parking safety. Continuing the City's theme of paved parking spaces is suggested. Engineered drawings and detailed cost estimates are needed; however, after a brief consultation with Urban Design, a preliminary cost estimate of \$275,000 is provided for 35 angled spaces.</p> <p>The VAC sits on City of Punta Gorda public land, is landlocked, and needs additional parking for customer safety and convenience. In addition to the current need for additional parking, anticipated VAC expansion to accommodate citizen and visitor demand for classes and free and open to the public exhibits will create the need for additional parking. The parking spaces are in a concentrated business and retail area in need of more parking and will relieve congestion and accommodate multiple businesses within the area, promoting economic development.</p>
Priority:	Infrastructure Sustainability
Goal:	To expand parking opportunities and sidewalks for customers and business patrons in the Visual Arts Center / Fishermen's Village market area along Maud St.



Financial Information							
5 Year Plan	Total	Prior	FY 2022	FY 2023	FY 2024	FY 2025	FY 2026
Project Costs							
Planning							
Design	\$15,000						
Construction	\$260,000						
Equipment							
Total	\$275,000						
Funding Sources							
UNFUNDED	TBD						
Impacts on Operations (negative entry indicates operating reduction)							
Maintenance, irrigation \$1,500 annually							

Dept/Div:	City Manager/Urban Design
Contact:	Joan LeBeau
Project Title:	Royal Poinciana Improvements Complete Street
Project Code:	TBD
Account #:	TBD
Description/ Justification:	<p>Preliminary Concept Design Completed.</p> <p>Design and Construct Complete Street Concept for Royal Poinciana between US41 S and Burnt Store Road, to include pavers and landscaping, bicycle facilities, ADA improvements, high visibility crosswalks, and decorative finish intersections where appropriate.</p> <p>Cost Estimated pending design and schedule of value – Total \$2,500,000: Design & Permitting - \$250,000 Construction - \$ 2,000,000 Contingency - \$250,000</p> <p>A continuation of the Punta Gorda Pathways, this "leg" of the project would be a connection from South Punta Gorda US 41 Multi-Use Recreational Trail (MURT) to SunTrail Network.</p>
Priority:	Infrastructure Sustainability
Goal:	Complete the 18-mile pedestrian/bicycle pathway connecting all neighborhoods through collaboration with applicable granting agencies and City investment in pathway by June 2022. Maintain and enhance the City’s infrastructure to ensure efficient and effective service delivery and quality aesthetic appeal.



Financial Information							
5 Year Plan	Total	Prior	FY 2022	FY 2023	FY 2024	FY 2025	FY 2026
Project Costs							
Planning							
Design	\$250,000						
Construction	\$2,250,000						
Equipment							
Total	\$2,500,000						
Funding Sources							
UNFUNDED	TBD						
Impacts on Operations (negative entry indicates operating reduction)							
Maint, electric, irrigation \$5,000 annually							

Dept/Div:	City Manager/Urban Design	
Contact:	Joan LeBeau	
Project Title:	Tropicana and Marion Sidewalk Enhancement	
Project Code:	TBD	
Account #:	TBD	
Description/Justification:	<p>Design preliminary concept plan for a sidewalk extension from Marion Ave to Hibiscus and enhance the appearance of the City owned lift station property.</p> <p>Preliminary estimate – Total \$300,000: Design and Permitting \$50,000 Construction \$200,000 Contingency/Permitting \$50,000</p> <p>Funding: \$300,000 UNFUNDED</p> <p>Implement the City's Transportation Element of the 2040 Comprehensive Plan to provide a level of service for all users by enhancing pedestrian safety and connectivity.</p>	
Priority:	Infrastructure Sustainability, Quality of Life	
Goal:	Maintain and enhance the City's infrastructure to ensure efficient and effective service delivery and quality aesthetic appeal. Support and promote a pedestrian/bicycle friendly community through implementing selected recommendations in the 2019 PLAN Punta Gorda Citywide Master Plan over the next five years.	

Financial Information							
5 Year Plan	Total	Prior	FY 2022	FY 2023	FY 2024	FY 2025	FY 2026
Project Costs							
Planning							
Design	\$50,000						
Construction	\$250,000						
Equipment							
Total	\$300,000						
Funding Sources							
UNFUNDED	TBD						
Impacts on Operations (negative entry indicates operating reduction)							
Maint, electric, irrigation \$2,500 annually							

Dept/Div:	City Manager/Urban Design	
Contact:	Joan LeBeau	
Project Title:	Historic District Street Lights	
Project Code:	TBD	
Account #:	TBD	
Description/Justification:	<p>This is a 2-year project. Project would consist of an engineering study to identify the missing decorative lighting connections in the Historic District; followed by engineering and construction documents and installation.</p> <p>Engineering Study - \$50,000 Design & Permitting - \$125,000 Construction - \$300,000 <u>Contingency/Permit - \$75,000</u> Total Anticipated Cost \$550,000</p> <p>Funding: \$550,000 UNFUNDED</p> <p>To enhance the safety, security, and aesthetic appeal of the Historic District. This project will also maintain the character of Historic Punta Gorda in keeping with the branding activities of the City.</p>	
Priority:	Infrastructure Sustainability, Quality of Life	
Goal:	Maintain and enhance the City’s infrastructure to ensure efficient and effective service delivery and quality aesthetic appeal. Support and promote a pedestrian/bicycle friendly community through implementing selected recommendations in the 2019 PLAN Punta Gorda Citywide Master Plan over the next five years.	

Financial Information							
5 Year Plan	Total	Prior	FY 2022	FY 2023	FY 2024	FY 2025	FY 2026
Project Costs							
Planning	\$50,000						
Design	\$125,000						
Construction	\$350,000						
Equipment							
Total	\$550,000						
Funding Sources							
UNFUNDED	TBD						
Impacts on Operations (negative entry indicates operating reduction)							
Maintenance, electric \$1,500 annually							

Dept/Div:	City Manager/Urban Design	
Contact:	Joan LeBeau	
Project Title:	Gilchrist Park - Harborwalk Improvements (Seating and Shade)	
Project Code:	TBD	
Account #:	TBD	
Description/ Justification:	<p>This is a 2-year project. Conceptual design and engineering – available options may include but not limited to pergola, shelter, shade structure, benches, seating wall, covered swing/bench, and landscaping/shade trees. Manufacturing and installation cost estimated only pending design and schedule of value.</p> <p>Design & Permitting - \$60,000 Construction - \$250,000 <u>Contingency - \$40,000</u> Total Anticipated Cost \$350,000</p> <p>Funding: \$350,000 UNFUNDED</p> <p>To enhance the usability and aesthetic appeal of Gilchrist Park and Harborwalk by providing additional comfort via additional seating and shade options.</p>	
Priority:	Infrastructure Sustainability	
Goal:	Maintain and enhance the City’s infrastructure to ensure efficient and effective service delivery and quality aesthetic appeal.	

Financial Information							
5 Year Plan	Total	Prior	FY 2022	FY 2023	FY 2024	FY 2025	FY 2026
Project Costs							
Planning							
Design	\$60,000						
Construction	\$290,000						
Equipment							
Total	\$350,000						
Funding Sources							
UNFUNDED	TBD						
Impacts on Operations (negative entry indicates operating reduction)							
Maintenance \$1,000 annually							

Dept/Div:	City Manager/Urban Design
Contact:	Joan LeBeau
Project Title:	Historic District Interpretation Markers
Project Code:	TBD
Account #:	TBD
Description/Justification:	<p>This is a 2-year project.</p> <p>Identification of historic point(s) of interest and historic significance throughout the City's Historic District.</p> <p>Design and development of historic interpretative marker (signage/wayfinding) plan that identifies the historic point of interest to create a unified message for Historic Punta Gorda while identifying the unique aspects of the historic areas.</p> <p>Manufacture and installation of markers.</p> <p>Construction: (cost estimated only pending design and schedule of value)</p> <p>Design & Permitting - \$125,000</p> <p>Construction - \$300,000</p> <p><u>Contingency/Permit - \$75,000</u></p> <p>Total Anticipated Cost \$500,000</p> <p>Funding: \$500,000 UNFUNDED</p> <p>To preserve and enhance the small town charm of the City by celebrating the unique history of our community in alignment with the City's Harborside Hometown brand.</p>
Priority:	Quality of Life
Goal:	Support, promote and maintain the City's historic character.



Financial Information							
5 Year Plan	Total	Prior	FY 2022	FY 2023	FY 2024	FY 2025	FY 2026
Project Costs							
Planning							
Design	\$125,000						
Construction	\$375,000						
Equipment							
Total	\$500,000						
Funding Sources							
UNFUNDED	TBD						
Impacts on Operations (negative entry indicates operating reduction)							
Maintenance \$1,500 annually							

Dept/Div:	City Manager/Urban Design	
Contact:	Joan LeBeau	
Project Title:	Harborwalk – Laishley Park Marriage Point	
Project Code:	TBD	
Account #:	TBD	
Description/Justification:	<p>This is a 1 to 2-year project.</p> <p>Design and Construct hardscape and landscape improvements including installation of new gazebo at Marriage Point in Laishley Park to address ADA issues outlined in the City's ADA Transition Plan.</p> <p>Construction (cost estimated only pending design and schedule of value): Design & Permitting - \$150,000 Construction - \$550,000 <u>Contingency/Permit - \$50,000</u> Total Anticipated Cost \$750,000</p> <p>Funding: \$750,000 UNFUNDED</p> <p>Marriage Point has not received any improvements in over 18 years and is in need of an update and improvements.</p>	
Priority:	Infrastructure Sustainability	
Goal:	Maintain and enhance the City's infrastructure to ensure efficient and effective service delivery and quality aesthetic appeal.	

Financial Information							
5 Year Plan	Total	Prior	FY 2022	FY 2023	FY 2024	FY 2025	FY 2026
Project Costs							
Planning							
Design	\$200,000						
Construction	\$550,000						
Equipment							
Total	\$750,000						
Funding Sources							
UNFUNDED	TBD						
Impacts on Operations (negative entry indicates operating reduction)							
Maintenance, electric \$3,000 annually							

Dept/Div:	City Manager/Urban Design	  
Contact:	Joan LeBeau	
Project Title:	Veterans Park Shade Structure(s)	
Project Code:	TBD	
Account #:	TBD	
Description/ Justification:	<p>Design, engineer, manufacture, and install shade structure(s) in Veterans Park open area by the gazebo.</p> <p>Estimated cost \$350,000.</p> <p>Funding: \$350,000 UNFUNDED</p> <p>This will enhance the usability of Veterans Park for key events by providing additional comfort to event participants via shade.</p>	
Priority:	Infrastructure Sustainability	
Goal:	Maintain and enhance the City's infrastructure to ensure efficient and effective service delivery and quality aesthetic appeal.	

Financial Information							
5 Year Plan	Total	Prior	FY 2022	FY 2023	FY 2024	FY 2025	FY 2026
Project Costs							
Planning							
Design	\$50,000						
Construction	\$300,000						
Equipment							
Total	\$350,000						
Funding Sources							
UNFUNDED	TBD						
Impacts on Operations (negative entry indicates operating reduction)							
Personnel							
Contractual							
Equipment							
Other							

Dept/Div:	City Manager/Urban Design	
Contact:	Joan LeBeau	
Project Title:	Trabue Park Improvements	
Project Code:	TBD	
Account #:	TBD	
Description/ Justification:	<p>This is a 2-year project.</p> <p>Development of conceptual design to best utilize the park property. Design Engineering & Permitting (includes design commission for public art or architectural gateway feature). Construct.</p> <p>Cost estimated only pending design and schedule of value. Design & Permitting - \$250,000, Construction - \$ 900,000, <u>Contingency - \$100,000</u> Total Anticipated Cost \$1,250,000.</p> <p>Funding: \$1,250,000 UNFUNDED</p> <p>Implementation of the City's Recreation & Open Space Element of the Comprehensive Plan to provide a recreational level of service for all users. Create a gateway feature at the eastern entry of the City, enhancing the appearance of the Medical District.</p>	
Priority:	Infrastructure Sustainability	
Goal:	Maintain and enhance the City's infrastructure to ensure efficient and effective service delivery and quality aesthetic appeal.	

Financial Information							
5 Year Plan	Total	Prior	FY 2022	FY 2023	FY 2024	FY 2025	FY 2026
Project Costs							
Planning							
Design	\$250,000						
Construction	\$1,000,000						
Equipment							
Total	\$1,250,000						
Funding Sources							
UNFUNDED	TBD						
Impacts on Operations (negative entry indicates operating reduction)							
Electric, maintenance \$10,000 annually							

Dept/Div:	City Manager/Urban Design	
Contact:	Joan LeBeau	
Project Title:	South Punta Gorda Park (Old Firestation II)	
Project Code:	TBD	
Account #:	TBD	
Description/ Justification:	<p>This is a 3-year project.</p> <p>Design preliminary concept plan for a park with amenities on a City owned property located in South Punta Gorda adjacent to Fire Station II, Acline Rd.</p> <p>Design, Engineering & Permitting, and Construction (cost estimated pending design and schedule of value) Design - \$225,000* Construction - \$ 675,000 <u>Contingency / Permit - \$100,000</u> Total Anticipated Cost \$1,000,000</p> <p>Funding: \$1,000,000 UNFUNDED</p> <p>*Possibly engineering could be done by City Engineer.</p> <p>Implementation of the City's Recreation & Open Space Element of the Comprehensive Plan to provide a recreational level of service for the South Punta Gorda Neighborhoods. Enhance the level of service of park facilities in compliance with the standards adopted in the City's Recreation and Open Space Element of the 2040 Comprehensive Plan.</p>	
Priority:	Infrastructure Sustainability	
Goal:	Maintain and enhance the City's infrastructure to ensure efficient and effective service delivery and quality aesthetic appeal.	

Financial Information							
5 Year Plan	Total	Prior	FY 2022	FY 2023	FY 2024	FY 2025	FY 2026
Project Costs							
Planning							
Design	\$225,000						
Construction	\$775,000						
Equipment							
Total	\$1,000,000						
Funding Sources							
UNFUNDED	TBD						
Impacts on Operations (negative entry indicates operating reduction)							
Mowing, maint, utilities \$5,000 annually							

Dept/Div:	City Manager/Urban Design	  
Contact:	Joan LeBeau	
Project Title:	Harborwalk West - Area 3	
Project Code:	HWALK3	
Account #:	TBD	
Description/Justification:	<p>This is a 2-year project.</p> <p>Design Harborwalk West along Retta to Linear Park to include 2 foot bridges, decorative lighting, landscaping, and on-street parking. A small portion of the lighting was completed by Public Works in FY 2021.</p> <p>Planning Estimates Only: Design & Permitting - \$300,000 Contingency - \$250,000 Construction - \$1,250,000 Total Anticipated Cost \$1,800,000.</p> <p>Funding: \$1,800,000 UNFUNDED</p> <p>A critical link in Punta Gorda Pathways, Harborwalk runs along the waterfront and extends from Cooper Street to Fisherman's Village. Punta Gorda Pathways provides access to a variety of destination points as well as a safe route to commercial, retail, historic, and downtown areas. Completion of the Pathways will contribute to the City's urban mobility and help to create a strong viable community.</p>	
Priority:	Infrastructure Sustainability	
Goal:	Complete the 18-mile pedestrian/bicycle pathway connecting all neighborhoods through collaboration with applicable granting agencies and City investment in pathways by June 2022. Maintain and enhance the City's infrastructure to ensure efficient and effective service delivery and quality aesthetic appeal.	

Financial Information							
5 Year Plan	Total	Prior	FY 2022	FY 2023	FY 2024	FY 2025	FY 2026
Project Costs							
Design	\$300,000						
Construction	\$1,500,000						
Equipment							
Total	\$1,800,000						
Funding Sources							
UNFUNDED	TBD						
Impacts on Operations (negative entry indicates operating reduction)							
Mowing, maint, electric, irrigation \$11,000 annually							

1% SALES TAX FUND
1% Sales Tax Infrastructure Projects
FY 2022 - FY 2027
(All figures in thousands of dollars)

PROJECT IDENTIFICATION	Page #	Total Project Cost	Prior Years	FY 2022	FY 2023	FY 2024	FY 2025	FY 2026	FY 2027	Total Planned	Estimated Grant Application	Estimated Impacts or Other	Unfunded Tier 2	Unidentified Funding Source
1% SALES TAX REVENUE				3,650	3,650	3,650	3,650	3,650	913	19,163				
EXPENDITURES:														
Ponce de Leon Park Improvements	67	2,995	305	0	0	0	0	0	0	305	0	840	0	1,850
Complete Street - Airport Rd Improvements	68	1,786	1,350	0	0	0	0	0	0	1,350	0	250	0	186
US 41 Complete Street - Airport to Carmalita	69	3,410	349	0	0	0	0	0	0	349	3,061	0	0	0
Virginia Ave Complete St Improv.-US 41 to Nesbit	70	950	950	0	0	0	0	0	0	950	0	0	0	0
Harborwalk - ADA US 41 SB Bridge Ramp	71	457	90	0	0	0	0	0	0	90	367	0	0	0
Harborwalk - US 41 Bridge Approach Lighting	72	400	120	0	0	0	0	0	0	120	0	0	0	280
Harborwalk West - Area 2 - Final Phase	73	2,389	2,389	0	0	0	0	0	0	2,389	0	0	0	0
Freeman House Preservation (\$32,000 from ins.)	74	1,103	208	0	0	0	0	0	0	208	500	32	0	363
Henry Street Sidewalk	75	156	156	0	0	0	0	0	0	156	0	0	0	0
Historic City Hall Preservation and Rehabilitation	76	5,500	500	4,488	0	0	0	0	0	4,988	0	0	0	512
Henry St Property Improvements	77	3,067	144	700	973	0	0	0	0	1,817	0	250	1,000	0
Drainage Improvements - Boca Grande Area	78	5,158	1,376	700	1,076	0	0	0	0	3,152	1,000	0	900	106
ADA Improvements - Citywide	79	1,462	683	130	130	130	130	130	129	1,462	0	0	0	0
Henry Street Crosswalks	80	249	0	0	249	0	0	0	0	249	0	0	0	0
Bayfront Activity Center	81	447	0	0	30	313	0	0	0	343	0	0	0	104
Public Safety Building Expansion	82	5,591	0	0	0	550	2,000	1,882	0	4,432	0	1,000	159	0
Historic District Infrastructure	83	2,788	0	0	0	275	275	275	213	1,038	0	500	1,250	0
Shreve Street Complete Street Improvements	84	355	225	0	0	0	130	0	0	355	0	0	0	0
Complete Street - Cooper Street Improvements	85	3,397	90	0	0	0	0	0	0	90	0	0	991	2,316
Complete Street - US 17 Improvements	86	3,019	0	0	0	0	0	0	519	519	2,500	0	0	0
Traffic Signal - Burnt Store Rd and Home Depot	87	1,100	0	0	0	0	0	0	0	0	0	0	345	755
1% SALES TAX FUNDING TOTAL		45,779	8,935	6,018	2,458	1,268	2,535	2,287	861	24,362	7,428	2,872	4,645	6,472
Estimated Projected Carryover - Beg				1,864	(504)	688	3,070	4,185	5,548					
Estimated Projected Carryover - End				(504)	688	3,070	4,185	5,548	5,600					
Interfund Loan from Fishermans Village Sale (Special Use Fund)				2,000	0	0	0	0	0					
Interfund Loan Repayment from 1% Sales Tax				0	0	0	(2,000)	0	0					
Estimated Projected Carryover - End with Interfund Loan				1,496	2,688	5,070	4,185	5,548	5,600					

Schedule covers through December 31, 2026

Dept/Div:	City Manager/Urban Design/Public Works
Contact:	Joan LeBeau/Rick Keeney
Project Title:	Ponce De Leon Park Improvements
Project Code:	PONCE
Account #:	301-3004-572-6332 / 118-3007-572-6332
Description/Justification:	<p>FY 2021 Repairs to existing seawall (\$320,689)</p> <p>FY 2021-2022 Design and permitting of existing boardwalk and fishing pier (\$224,327)</p> <p>FY 2022-2023 Construction and repairs to boardwalk and fishing pier (\$1,100,000)</p> <p>FY 2023-2024 Design, engineer, and construct new rest room facility, pavilion, boat & trailer parking and site furnishings (\$1,000,000)</p> <p>FY 2024-2025 Design and install new playground (\$350,000)</p> <p>Funding through 2022: \$700,000 – Proceeds from Sale of Fisherman’s Village \$140,000 – Wooden pathways and pilings project (general funds accounted for on separate CIP sheet) \$305,000 – 1% Sales Tax \$1,850,000 - Unfunded</p> <p>Park facility and amenities are in need of replacement due to their age and extensive public use.</p>
Priority:	Infrastructue Sustainability, Quality of Life
Goal:	Maintain and enhance the City infrastructure to ensure efficient and effective service delivery and quality aesthetic appeal. Support, promote, improve & maintain the City's historic character. Achieve status as a waterfront destination for land and water visitors.



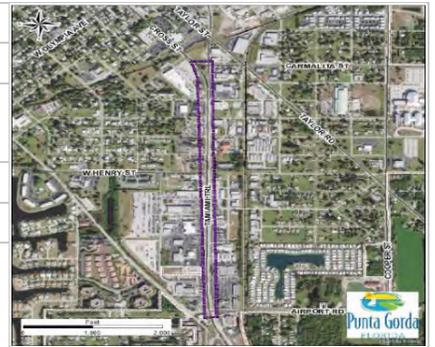
Financial Information							
5 Year Plan	Total	Prior	FY 2022	FY 2023	FY 2024	FY 2025	FY 2026
Project Costs							
Planning							
Design	\$533,000	\$224,327	\$0	\$308,673	\$0	\$0	\$0
Construction	\$2,072,000	\$920,673	\$0	\$441,327	\$750,000	\$0	\$0
Equipment	\$350,000	\$0	\$0	\$0	\$0	\$350,000	\$0
Total	\$2,955,000	\$1,145,000	\$0	\$750,000	\$750,000	\$350,000	\$0
Funding Sources							
Local-GF	\$140,000	\$140,000	\$0	\$0	\$0	\$0	\$0
Local-OF	\$700,000	\$700,000	\$0	\$0	\$0	\$0	\$0
Local-ST	\$305,000	\$305,000	\$0	\$0	\$0	\$0	\$0
UNFUNDED	TBD	\$0	\$0	TBD	TBD	TBD	\$0
Impacts on Operations (negative entry indicates operating reduction)							
Mowing, Maint, & electric	\$16,000	\$0	\$2,000	\$2,000	\$2,000	\$5,000	\$5,000

Dept/Div:	City Manager/Urban Design
Contact:	Joan Le Beau
Project Title:	Complete Street – Airport Road Improvements
Project Code:	AIRCOM
Account #:	118-3007-541-6517
Description/Justification:	<p>FY 2021-2022: Design improvements on Airport Road from US 41 to Cooper Street providing sidewalks, bicycle facilities, decorative street lights and street trees. Design \$171,000</p> <p>FY 2022-2023 - Construction</p> <p>Planning Estimates – Total \$1,786,000 Railroad Crossings - \$500,000 All other Construction - \$1,000,000 Permit - \$10,000 Engineering Services- \$5,000 Contingency - \$100,000</p> <p>Funding: \$1,350,000 - 1% Sales Tax \$250,000 - Mobility Impact fees \$186,000 Unfunded: Possible add'l Mobility Impact fees</p> <p>A continuation of Punta Gorda Pathways; this "leg" of the project would be the East Punta Gorda connection. The addition of path lighting will enhance safety and security of the pathway encouraging more utilization in the sunrise and twilight hours.</p>
Priority:	Infrastructure Sustainability
Goal:	Complete 18-mile pedestrian/bicycle pathway connecting all neighborhoods through collaboration with applicable granting agencies and City investment in pathways by June 2022.



Financial Information							
5 Year Plan	Total	Prior	FY 2022	FY 2023	FY 2024	FY 2025	FY 2026
Project Costs							
Planning							
Design	\$171,000	\$171,000	\$0	\$0	\$0	\$0	\$0
Construction	\$1,615,000	\$1,179,000	\$436,000	\$0	\$0	\$0	\$0
Equipment							
Total	\$1,786,000	\$1,350,000	\$436,000	\$0	\$0	\$0	\$0
Funding Sources							
Local-ST	\$1,350,000	\$1,350,000	\$0	\$0	\$0	\$0	\$0
Local-FSIF	\$250,000	\$0	\$250,000	\$0	\$0	\$0	\$0
UNFUNDED	TBD	\$0	TBD	\$0	\$0	\$0	\$0
Impacts on Operations (negative entry indicates operating reduction)							
Maint & electric	\$20,000	\$0	\$0	\$5,000	\$5,000	\$5,000	\$5,000

Dept/Div:	City Manager/Urban Design
Contact:	Joan LeBeau
Project Title:	Complete Street - US 41 - Airport to Carmalita Improvements
Project Code:	440268
Account #:	301-3004-541-6518/118-3007-541-6518
Description/Justification:	<p>FY 2021-2022: Design plan for US 41 from Airport Road to Carmalita. Street pavers and tree wells in utility strips, ADA improvements and high visibility crosswalks and decorative finish intersection treatments where appropriate for approximately 4,600 feet.</p> <p>FY 2022-2023: Construction</p> <p>Planning Estimates – Total \$3,410,214: Design - \$150,000 Construction - \$2,900,214 Permit - \$5,000 Engineering - \$5,000 Contingency - \$50,000 CEI Services - \$300,000</p> <p>Funding: \$3,061,214 - FDOT LAP Grant \$349,000 - 1% Sales Tax and Interest from Special Use Fund</p> <p>Note: City will be responsible for any cost above grant amount</p> <p>Project implements the Punta Gorda and the Florida Dept. of Transportation Complete Streets policies.</p>
Priority:	Infrastructure Sustainability
Goal:	Complete the 18-mile pedestrian/bicycle pathway connecting all neighborhoods through collaboration with applicable granting agencies and City investment in pathways by June 2022.



Financial Information							
5 Year Plan	Total	Prior	FY 2022	FY 2023	FY 2024	FY 2025	FY 2026
Project Costs							
Planning							
Design	\$150,000	\$150,000	\$0	\$0	\$0	\$0	\$0
Construction	\$3,260,214	\$349,000	\$2,911,214	\$0	\$0	\$0	\$0
Total	\$3,410,214	\$499,000	\$2,911,214	\$0	\$0	\$0	\$0
Funding Sources							
Local-ST/OF	\$349,000	\$349,000	\$0	\$0	\$0	\$0	\$0
State-G	\$3,061,214	\$150,000	\$2,911,214	\$0	\$0	\$0	\$0
Impacts on Operations (negative entry indicates operating reduction)							
Mowing, Maint & electric	\$20,000	\$0	\$0	\$5,000	\$5,000	\$5,000	\$5,000

Dept/Div:	City Manager/Urban Design	
Contact:	Joan LeBeau	
Project Title:	Complete Street - Virginia Avenue Improvements - US 41 to Nesbit	
Project Code:	VIRCOM	
Account #:	118-3007-541-6519	
Description/ Justification:	<p>FY 2021-2022: Design - Complete Street improvements on Virginia Avenue from US 41 to Nesbit Street improving existing sidewalks filling in gaps, increasing width throughout downtown, providing decorative crosswalks, parking, lighting, and trees.</p> <p>FY 2022-2023: Construction</p> <p>Planning Estimates – Total \$950,000 Design & Survey \$350,000 Construction - \$500,000 Permit - \$8,000 Engineering Services \$5,000 Contingency - \$84,000</p> <p>Funding: \$950,000 1% Sales Tax</p> <p>This is an internal continuation of the Punta Gorda Pathway project. The addition of this section will safely connect the residential community to the commercial section providing access to a variety of destination points as well as a safe route to commercial, retail & other areas.</p>	
Priority:	Infrastructure Sustainability	
Goal:	Complete 18-mile pedestrian/bicycle pathway connecting all neighborhoods through collaboration with applicable granting agencies and City investment in pathways by June 2022.	

Financial Information							
5 Year Plan	Total	Prior	FY 2022	FY 2023	FY 2024	FY 2025	FY 2026
Project Costs							
Planning							
Design	\$350,000	\$350,000	\$0	\$0	\$0	\$0	\$0
Construction	\$600,000	\$600,000	\$0	\$0	\$0	\$0	\$0
Equipment							
Total	\$950,000	\$950,000	\$0	\$0	\$0	\$0	\$0
Funding Sources							
Local – ST	\$950,000	\$950,000	\$0	\$0	\$0	\$0	\$0
Impacts on Operations (negative entry indicates operating reduction)							
Maint & electric	\$12,000	\$0	\$0	\$3,000	\$3,000	\$3,000	\$3,000

Dept/Div:	City Manager/Urban Design
Contact:	Joan LeBeau
Project Title:	Harborwalk - ADA US 41 SB Bridge Ramp
Project Code:	ADAHWR
Account #:	118-3007-572-6576
Description/Justification:	<p>FY 2021-2022: Design to PPM standards the Harborwalk ADA ramp at the US 41 SB Bridge. FY 2022-2023: Construction</p> <p>Planning Estimates – Total \$457,208 Design - \$90,000 Construction - \$302,208, Engineering Services \$5,000, Contingency - \$10,000, CEI Services - \$50,000</p> <p>Funding: \$90,000 1% Sales Tax \$367,208 Potential Grant Fund (FDOT LAP)</p> <p>Note: City is responsible for 100% design cost, CEI, and construction costs above grant limit</p> <p>A critical link in Punta Gorda Pathways. Harborwalk that addresses ADA connections along the waterfront and extends from Cooper Street to Fisherman's Village. The Pathways provide access to a variety of destination points as well as a safe route to commercial, retail, historic, and downtown areas. Completion of the Pathways will contribute to the City's urban mobility, and help to create a strong viable community.</p>
Priority:	Infrastructure Sustainability
Goal:	Maintain and enhance the City's infrastructure to ensure efficient and effective service delivery and quality aesthetic appeal. Complete 18-mile pedestrian/bicycle pathway connecting all neighborhoods through collaboration with applicable granting agencies and City investment in pathways by June 2022.



Financial Information							
5 Year Plan	Total	Prior	FY 2022	FY 2023	FY 2024	FY 2025	FY 2026
Project Costs							
Design	\$90,000	\$90,000	\$0	\$0	\$0	\$0	\$0
Construction	\$367,208	\$0	\$367,208	\$0	\$0	\$0	\$0
Total	\$457,208	\$90,000	\$367,208	\$0	\$0	\$0	\$0
Funding Sources							
Local-ST	\$90,000	\$90,000	\$0	\$0	\$0	\$0	\$0
State-G	TBD	\$0	TBD	\$0	\$0	\$0	\$0
Impacts on Operations (negative entry indicates operating reduction)							
Mowing, Maint & electric	\$4,000	\$0	\$0	\$1,000	\$1,000	\$1,000	\$1,000

Dept/Div:	City Manager/Urban Design	
Contact:	Joan LeBeau	
Project Title:	Harborwalk - US 41 Bridge Approach Lighting	
Project Code:	TBD	
Account #:	118-3007-541-6507	
Description/Justification:	<p>FY 2022: Install decorative lighting along US 41NB from Retta Esplanade to Peace River Bridge in conjunction with FDOT road resurfacing project (441524).</p> <p>FY2025: Install decorative lighting along US 41SB from West Retta Esplanade to Peace River Bridge in conjunction with FDOT road resurfacing project (TBD).</p> <p>Planning Estimates Only \$400,000 Anticipated to cover the cost of decorative lighting.</p> <p>Funding: \$120,000 Sales Tax \$280,000 UNFUNDED</p> <p>Lighting consistency on US 41 from Virginia Avenue to the Peace River Bridge for enhanced safety for all roadway users. This project provides enhanced aesthetic appeal to the historic downtown areas of Punta Gorda creating a strong viable community while promoting the City's Harborside Hometown feel.</p>	
Priority:	Infrastructure Sustainability, Quality of Life	
Goal:	Maintain and enhance the City's infrastructure to ensure efficient and effective service delivery, quality aesthetic appeal. Maintain the City's high safety rating, emergency response and storm preparedness.	

Financial Information							
5 Year Plan	Total	Prior	FY 2022	FY 2023	FY 2024	FY 2025	FY 2026
Project Costs							
Planning							
Design							
Construction	\$400,000	\$120,000	\$80,000	\$0	\$0	\$200,000	\$0
Equipment							
Total	\$400,000	\$120,000	\$80,000	\$0	\$0	\$200,000	\$0
Funding Sources							
Local-ST	\$120,000	\$120,000	\$0	\$0	\$0	\$0	\$0
UNFUNDED	TBD	\$0	TBD	\$0	\$0	TBD	\$0
Impacts on Operations (negative entry indicates operating reduction)							
Personnel							
Contractual							
Equipment							
Maint & electric	\$6,250	\$0	\$0	\$1,250	\$1,250	\$1,250	\$2,500

Dept/Div:	City Manager/Urban Design	
Contact:	Joan LeBeau	
Project Title:	Harborwalk West - Area 2b - Final Phase	
Project Code:	HVAR2	
Account #:	118-3007-572-6583	
Description/ Justification:	<p>FY 2021-2022: Construction</p> <p>Engineering Estimate – Total \$2,388,655 Construction - \$2,024,655 Permit - \$5,000 Contingency - \$359,000</p> <p>Following the completion of the Harborwalk from Gill St to Berry St, this project will provide park improvements to Gilchrist Park and streetscape enhancements to W Retta Esplanade. These improvements are designed to increase accessibility and functionality within the park and improve roadway safety and parking.</p>	
Priority:	Infrastructure Sustainability	
Goal:	Complete the 18-mile pedestrian/bicycle pathway connecting all neighborhoods through collaboration with applicable granting agencies and City investment in pathways by June 2022.	

Financial Information							
5 Year Plan	Total	Prior	FY 2022	FY 2023	FY 2024	FY 2025	FY 2026
Project Costs							
Planning							
Design							
Construction	\$2,388,655	\$2,388,655	\$0	\$0	\$0	\$0	\$0
Equipment							
Total	\$2,388,655	\$2,388,655	\$0	\$0	\$0	\$0	\$0
Funding Sources							
Local-ST	\$2,388,655	\$2,388,655	\$0	\$0	\$0	\$0	\$0
Impacts on Operations (negative entry indicates operating reduction)							
Personnel							
Contractual							
Equipment							
Mowing, maint & electric	\$20,000	\$0	\$0	\$5,000	\$5,000	\$5,000	\$5,000

Dept/Div:	Urban Design/Public Works	
Contact:	Joan LeBeau/Rick Keeney	
Project Title:	AC Freeman House Preservation	
Project Code:	FREEMN	
Account #:	118-3007-579-6222 / 301-3004-579-6222	
Description/Justification:	<p>FY 2021 – 2022: Comprehensive building evaluation and report, hazardous materials testing, design development documents and construction documents - \$103,000</p> <p>FY 2022-2023: Rehabilitation and construction Planning estimate – Total \$1,000,000 Project Management \$8,000 CEI Services* \$195,000 Construction \$702,000 Permit/Const. Serv/Contingency \$95,000</p> <p>Funding: \$208,000 1% Sales Tax \$32,000 Insurance proceeds \$863,000 UNFUNDED – To be appropriated if grant approved</p> <p>City is looking for potential grant funds to supplement the cost up to \$500,000.</p> <p>*If successful with grant CEI services may be required.</p> <p>Project to provide for full architectural services for the evaluation, design, construction documents, and bidding assistance to preserve the Historic AC Freeman House, listed on the National Register of Historic Places.</p>	
Priority:	Infrastructure Sustainability	
Goal:	Maintain and enhance the City's infrastructure to ensure efficient and effective service delivery and quality aesthetic appeal.	

Financial Information							
5 Year Plan	Total	Prior	FY 2022	FY 2023	FY 2024	FY 2025	FY 2026
Project Costs							
Planning							
Design	\$103,000	\$18,000	\$85,000	\$0	\$0	\$0	\$0
Construction	\$1,000,000	\$222,000	\$778,000	\$0	\$0	\$0	\$0
Equipment							
Total	\$1,103,000	\$240,000	\$863,000	\$0	\$0	\$0	\$0
Funding Sources							
Local-ST/OF	TBD	\$240,000	TBD	\$0	\$0	\$0	\$0
State-G	TBD	\$0	TBD	\$0	\$0	\$0	\$0
Impacts on Operations (negative entry indicates operating reduction)							
General maint & utilities	\$15,000	\$0	\$0	\$0	\$5,000	\$5,000	\$5,000

Dept/Div:	Public Works	
Contact:	Rick Keeney	
Project Title:	Henry Street Sidewalk	
Project Code:	HENSWK	
Account #:	118-3007-541-6319	
Description/Justification:	<p>Installation of sidewalk on Henry Street between Shreve and SR 41.</p> <p>FY 2021: 1% Sales Tax funded Construction estimate \$150,000 Project management \$6,000</p> <p>To provide a safe access for pedestrians and school children along heavily used routes, in conjunction with state policies and the City's Comprehensive Plan.</p>	
Priority:	Infrastructure Sustainability	
Goal:	Apply best management practices & systems in infrastructure maintenance; Establish a five-year capital improvements program that ensures infrastructure is in place to meet projected growth demands and update the plan on an annual basis.	

Financial Information							
5 Year Plan	Total	Prior	FY 2022	FY 2023	FY 2024	FY 2025	FY 2026
Project Costs							
Planning							
Design							
Construction	\$156,000	\$156,000	\$0	\$0	\$0	\$0	\$0
Equipment							
Total	\$156,000	\$156,000	\$0	\$0	\$0	\$0	\$0
Funding Sources							
Local-ST	\$156,000	\$156,000	\$0	\$0	\$0	\$0	\$0
Impacts on Operations (negative entry indicates operating reduction)							
Personnel							
Contractual							
Equipment							
Other							

Dept/Div:	City Manager/Urban Design
Contact:	Joan LeBeau
Project Title:	Historic City Hall Rehabilitation
Project Code:	CHPRRH
Account #:	118-3007-519-6202
Description/Justification:	<p>FY 2020: Completed Needs Assessment report- \$93,225 (not included in totals). FY 2021-2022: Design Historic rehabilitation, security, and ADA accessibility improvements as identified in Needs Assessment report. FY 2022-2023 Rehabilitation and Construction</p> <p>Cost estimate only (pending architectural design and schedule of value) – Total \$5,500,000 Architecture/Engineering \$500,000 Rehabilitation \$902,800 New Construction \$3,500,000 Permit/Contingency \$489,200 Project Management \$108,000</p> <p>Funding Source: \$4,988,000 1% Sales Tax \$512,000 UNFUNDED</p> <p>Relocation costs \$500,000 – Budgeted in General Fund</p> <p>After a comprehensive evaluation of the building’s major systems - structural, electrical, mechanical, and plumbing - there were numerous deficiencies in need of remediation in order to improve the overall condition and functionality of this building while maintaining its historic character.</p>
Priority:	Infrastructure Sustainability
Goal:	Maintain and enhance the City’s infrastructure to ensure efficient and effective service delivery and quality aesthetic appeal. Establish a five-year capital improvements program that ensures infrastructure is in place to meet projected growth demands and update the plan on an annual basis.



Financial Information							
5 Year Plan	Total	Prior	FY 2022	FY 2023	FY 2024	FY 2025	FY 2026
Project Costs							
Design	\$500,000	\$500,000	\$0	\$0	\$0	\$0	\$0
Construction	\$5,000,000	\$0	\$4,488,000	\$512,000	\$0	\$0	\$0
Equipment							
Total	\$5,500,000	\$500,000	\$4,488,000	\$512,000	\$0	\$0	\$0
Funding Sources							
Local – ST	\$4,988,000	\$500,000	\$4,488,000	\$0	\$0	\$0	\$0
UNFUNDED	TBD	\$0	\$0	TBD	\$0	\$0	\$0
Impacts on Operations (negative entry indicates operating reduction)							
Maint & utilities	\$9,000	\$0	\$0	\$0	\$3,000	\$3,000	\$3,000

Dept/Div:	City Manager/Urban Design	
Contact:	Joan LeBeau	
Project Title:	W Henry St. Property Improvements and Connecting Points of Interest	
Project Code:	HENIMP	
Account #:	118-3007-572-6512 / 301-3004-572-6332	
Description/Justification:	<p>FY 2022-2023: Design enhancements to include Hounds on Henry, Peace River Wildlife Center connectivity to History Park, Library, and Linear Park. (Rest room facilities, parking, pathway connections, landscape.) Hounds on Henry to include site furnishings, pavilion, and ADA compliance.</p> <p>FY 2023-2025: Construction</p> <p>Planning Estimate – Total \$3,067,000: Design - \$300,000 Construction - \$ 2,250,000 Permit / Contingency - \$450,000 Project management - \$67,000</p> <p>Funding: \$1,817,000 1% Sales Tax \$250,000 Park Impact Fees \$1,000,000 UNFUNDED – Tier2 Request – 1% Sales Tax</p> <p>Property improvements to this site will provide amenities to increase site usage and enhance the quality of life. May be split in phases (i.e. Hounds on Henry and ½ parking lot may be the first phase)</p>	
Priority:	Quality of Life	
Goal:	Support, promote, improve and maintain the City's historic character. Support and promote a pedestrian and bicycle friendly community through implementing selected recommendations in the 2019 PLAN Punta Gorda Citywide Master Plan over the next five years.	

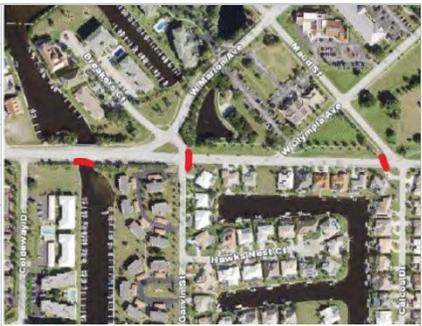
Financial Information							
5 Year Plan	Total	Prior	FY 2022	FY 2023	FY 2024	FY 2025	FY 2026
Project Costs							
Design	\$300,000	\$144,000	\$0	\$0	\$0	\$156,000	\$0
Construction	\$2,767,000	\$0	\$845,000	\$1,078,000	\$0	\$844,000	\$0
Equipment							
Total	\$3,067,000	\$144,000	\$845,000	\$1,078,000	\$0	1,000,000	\$0
Funding Sources							
Local-ST	\$1,817,000	\$144,000	\$700,000	\$973,000	\$0	\$0	\$0
Local-FSIF	\$205,000	\$0	\$145,000	\$105,000	\$0	\$0	\$0
UNFUNDED	TBD	\$0	\$0	\$0	\$0	TBD	\$0
Impacts on Operations (negative entry indicates operating reduction)							
Mowing, maint & utilities	\$35,000	\$0	\$0	\$4,000	\$8,000	\$8,000	\$15,000

Dept/Div:	Public Works	
Contact:	Rick Keeney	
Project Title:	Drainage Improvements - Boca Grande Area	
Project Code:	CABGDI	
Account #:	118-3007-541-6320/301-3004-541-6320	
Description/Justification:	<p>Previous years: Acquire property for stormwater ponds and construct drainage improvements for Boca Grande area drainage project. 90% design plans complete, awaiting verification that the City can obtain the required lots.</p> <p>Funding Requests: \$3,152,000 FY 2016-FY 2023 1% Sales Tax \$1,000,000 FY 2022 State Grant/Appropriation \$1,006,215 Unfunded - \$900,000 Tier 2 request, \$106,215 unidentified</p> <p>Costs include project management of \$76,000.</p> <p>City council approved the design alternative and is exploring various funding opportunities.</p>	
Priority:	Infrastructure Sustainability, Quality of Life	
Goal:	Maintain and enhance the City's infrastructure to ensure efficient and effective service delivery and quality aesthetic appeal. Apply best management practices & systems in infrastructure maintenance. Maintain the City's high safety rating, emergency response, and storm preparedness.	

Financial Information							
5 Year Plan	Total	Prior	FY 2022	FY 2023	FY 2024	FY 2025	FY 2026
Project Costs							
Land	\$400,000	\$400,000	\$0	\$0	\$0	\$0	\$0
Design	\$425,000	\$425,000	\$0	\$0	\$0	\$0	\$0
Construction	\$4,333,215	1,156,645	\$1,700,000	\$2,082,070	\$0	\$0	\$0
Equipment							
Total	\$5,158,215	\$1,376,145	\$1,700,000	\$2,082,070	\$0	\$0	\$0
Funding Sources							
Local – ST	\$2,076,145	\$1,376,145	\$700,000	TBD	\$0	\$0	\$0
State – G	\$1,000,000	\$0	\$1,000,000	TBD	\$0	\$0	\$0
Federal – G	TBD	\$0	\$0	TBD	\$0	\$0	\$0
Impacts on Operations (negative entry indicates operating reduction)							
Personnel							
Contractual							
Equipment							
Other							

Dept/Div:	City Manager/Urban Design	
Contact:	Joan LeBeau	
Project Title:	ADA Transition Plan Implementation	
Project Code:	Various	
Account #:	118-3007-515-6300	
Description/Justification:	<p>FY 2022 – 2027: Implementation of the City ADA Transition Plan to assure compliance with all federal, state and local regulations, standards and compliance monitoring requirements.</p> <p>Projects include but not limited to: ADA & Security Enhancements, Internal Wayfinding Signage, Laishley Park Improvements, Linear Park Improvements, City Hall Improvements, Nature Park Improvements.</p> <p>Funding Per Year - \$125,000 + \$5,000 for Project Management.</p> <p>FY 2026 includes \$129,000 for FY 2027.</p> <p>To remain eligible for federal grant funding the City is required to have in place an ADA Transition Plan that includes a schedule of implementation.</p>	
Priority:	Infrastructure Sustainability	
Goal:	Maintain and enhance the City's infrastructure to ensure efficient and effective service delivery and quality aesthetic appeal.	

Financial Information							
5 Year Plan	Total	Prior	FY 2022	FY 2023	FY 2024	FY 2025	FY 2026+
Project Costs							
Planning							
Design							
Construction	\$1,462,388	\$683,388	\$130,000	\$130,000	\$130,000	\$130,000	\$259,000
Equipment							
Total	\$1,462,388	\$683,388	\$130,000	\$130,000	\$130,000	\$130,000	\$259,000
Funding Sources							
Local-ST	\$1,462,388	\$683,388	\$130,000	\$130,000	\$130,000	\$130,000	\$259,000
Impacts on Operations (negative entry indicates operating reduction)							
Personnel							
Contractual							
Equipment							
Other							

Dept/Div:	Public Works	
Contact:	Rick Keeney	
Project Title:	Henry Street Crosswalks	
Project Code:	TBD	
Account #:	118-3007-541-6393	
Description/Justification:	<p>Install a "Hawk" signalized crosswalk from near the SE corner of Garvin and Henry connecting to the adjacent sidewalk at the NE corner of Breakers Court and Henry Street. Install a non-signalized standard crosswalk from near the SW corner of Caicos and Henry to the adjacent sidewalk at the NW corner of Henry and Maud Streets.</p> <p>Install a flashing beacon light at the top of the bridge on Marion Street before Garvin Street visible eastbound with signage, "Slow Pedestrian Crossing Ahead."</p> <p>FY 2023: Construction Cost \$240,000 + \$9,000 Project Management funded by 1% Sales Tax.</p> <p>The project will improve the safety and quality of life for residents from Henry Street side streets from Lewis Circle to Exuma Court by providing safe crossing points from the South side of Henry Street for pedestrians and cyclists to access popular dining, shopping, and recreation areas at or near Fishermen's Village. There is an absence of sidewalk and marked crosswalks on this pedestrian and cyclist-heavy area.</p>	
Priority:	Infrastructure Sustainability, Quality of Life	
Goal:	Establish a five-year capital improvements program that ensures infrastructure is in place to meet projected growth demands and update the plan on an annual basis. Maintain the City's high safety rating, emergency response and storm preparedness.	

Financial Information							
5 Year Plan	Total	Prior	FY 2022	FY 2023	FY 2024	FY 2025	FY 2026
Project Costs							
Planning							
Design							
Construction	\$249,000	\$0	\$0	\$249,000	\$0	\$0	\$0
Equipment							
Total	\$249,000	\$0	\$0	\$249,000	\$0	\$0	\$0
Funding Sources							
Local – ST	\$249,000	\$0	\$0	\$249,000	\$0	\$0	\$0
Impacts on Operations (negative entry indicates operating reduction)							
Personnel							
Contractual							
Equipment							
R&M, electric	\$1,500	\$0	\$0	\$0	\$500	\$500	\$500

Dept/Div:	Public Works	
Contact:	Rick Keeney	
Project Title:	Bayfront Activity Center	
Project Code:	TBD	
Account #:	TBD	
Description/Justification:	<p>FY 2023 – 2024:</p> <p>Estimated costs for renovations – Total \$446,681: Windows – \$120,000, Cabinets – \$34,335 Appliances – 10,400, Flooring – 77,646 Roofing – 114,400, Plumbing – 50,000 Painting – 11,700, Pergola – 13,000 Proj Mgmt – 12,000</p> <p>Funding: \$343,000 1% Sales Tax \$103,681 UNFUNDED</p> <p>Recommendation of the Gilchrist Park Waterfront Activity Study by Dover Kohl & Partners and City Council to retain and renovate the building.</p>	
Priority:	Infrastructure Sustainability	
Goal:	Apply best management practices and systems in infrastructure maintenance; establish a five-year capital improvements program that ensures infrastructure is in place to meet projected growth demands and update the plan on an annual basis.	

Financial Information							
5 Year Plan	Total	Prior	FY 2022	FY 2023	FY 2024	FY 2025	FY 2026
Project Costs							
Planning							
Design							
Construction	\$436,281	\$0	\$0	\$30,000	\$406,281	\$0	\$0
Equipment	\$10,400	\$0	\$0	\$0	\$10,400	\$0	\$0
Total	\$446,681	\$0	\$0	\$30,000	\$416,681	\$0	\$0
Funding Sources							
Local – ST	\$343,000	\$0	\$0	\$30,000	\$313,000	\$0	\$0
UNFUNDED	TBD	\$0	\$0	\$0	TBD	\$0	\$0
Impacts on Operations (negative entry indicates operating reduction)							
Personnel							
Contractual							
Equipment							
Other							

Dept/Div:	Police Department/Fire Department
Contact:	Jason Ciaschini/Ray Briggs
Project Title:	Public Safety Building Expansion
Project Code:	TBD
Account #:	118-3007-521-6216 / 301-3004-521-6216
Description/Justification:	<p>FY 2024-2027: Create additional office space to accommodate growth of police department, including a new training room. Fire department will renovate/reconfigure current living and office space to expand administrative space, utilize existing training room and add on at rear of the building for expansion and increased staffing, and designate an area that allows Emergency Management to activate a command center. Additional parking will be needed.</p> <p>Funding Requests: \$4,432,000 1% Sales Tax (includes \$163,500 for proj. mgmt) \$1,000,000 Est. Public Safety Impact Fees \$159,000 Tire 2 Request – 1% Sales Tax</p> <p>Police department needs include supporting a community engagement unit, 82+ volunteers, training room, property custodian, and administrative offices.</p> <p>Fire Station 1 requires additional office space, bunk room, locker room, day room, and kitchen to support additional administrative shift personnel.</p>
Priority:	Infrastructure Sustainability, Quality of Life
Goal:	Maintain and enhance the City’s infrastructure to ensure efficient and effective service delivery and quality aesthetic appeal. Establish a five-year capital improvements program that ensures infrastructure is in place to meet projected growth demands and update the plan on an annual basis. Maintain the City’s high safety rating, emergency response, and storm preparedness.



Financial Information							
5 Year Plan	Total	Prior	FY 2022	FY 2023	FY 2024	FY 2025	FY 2026+
Project Costs							
Design	\$391,000	\$0	\$0	\$0	\$391,000	\$0	\$0
Construction	\$5,000,000	\$0	\$0	\$0	\$159,000	\$2,500,000	\$2,341,000
Equipment	\$200,000	\$0	\$0	\$0	\$0	\$0	\$200,000
Total	\$5,591,000	\$0	\$0	\$0	\$550,000	\$2,500,000	\$2,541,000
Funding Sources							
Local-ST	\$4,432,000	\$0	\$0	\$0	\$550,000	\$2,000,000	\$1,882,000
Local-FSIF	\$1,000,000	\$0	\$0	\$0	\$0	\$500,000	\$500,000
UNFUNDED	TBD	\$0	\$0	\$0	\$0	\$0	TBD
Impacts on Operations (negative entry indicates operating reduction)							
Electric, janitorial, R&M \$4,000 per yr once completed							

Dept/Div:	City Manager/Urban Design
Contact:	Joan LeBeau
Project Title:	Historic District Infrastructure
Project Code:	TBD
Account #:	Various accounts
Description/Justification:	<p>Phased approach for design and improvements as recommended from the completed study include installing new sidewalks and missing sidewalk connections, decorative and high mass lighting, and drainage improvements.</p> <p>Planning Estimate – Total \$2,788,000: Design and Engineering - \$275,000 Project Management - \$38,000 Construction - \$2,200,000, Construction Permit - \$5,000, Contingency - \$270,000</p> <p>Funding Requests: \$1,038,000 1% Sales tax includes \$38,000 for Proj. mgmnt \$1,250,000 Tier 2 - 1% sales tax (unfunded) \$ 500,000 est. Mobility impact fees (unfunded and accounted for as part of Sidewalks funded by Mobility Impacts).</p> <p>This project will improve the infrastructure (sidewalk connections, drainage, and lighting) in the Historic District Community in the City's efforts to promote and preserve the neighborhood. It will also support and assist independent organizations of the Historic Community to improve and preserve the neighborhood.</p>
Priority:	Infrastructure Sustainability
Goal:	Maintain and enhance the City's infrastructure to ensure effective service delivery and quality aesthetic appeal. Establish a five-year capital improvements program that ensures infrastructure is in place to meet projected growth demands and update the plan on an annual basis.



Financial Information							
5 Year Plan	Total	Prior	FY 2022	FY 2023	FY 2024	FY 2025	FY 2026+
Project Costs							
Design	\$275,000	\$0	\$0	\$0	\$27,000	\$75,000	\$173,000
Construction	\$2,513,000	\$0	\$0	\$0	\$248,000	\$688,00	\$1,577,000
Equipment							
Total	\$2,788,000	\$0	\$0	\$0	\$275,000	\$763,000	\$1,750,000
Funding Sources							
Local-ST	\$1,038,000	\$0	\$0	\$0	\$275,000	\$275,000	\$488,000
Local-FSIF (UNF)	TBD	\$0	\$0	\$0	\$0	TBD	TBD
UNFUNDED	TBD	\$0	\$0	\$0	\$0	TBD	TBD
Impacts on Operations (negative entry indicates operating reduction)							
Electric, mowing, maint. \$10,000 per yr once completed	10,000						

Dept/Div:	City Manager/Urban Design	
Contact:	Joan LeBeau	
Project Title:	Shreve Street Complete Street Improvements	
Project Code:	SHVCOM	
Account #:	118-3007-541-6512	
Description/Justification:	<p>FY 2021 – 2022: Lighting on the Shreve Street Path from Airport Road/Pompano Terrace to History Park. Total Cost - \$167,000</p> <p>FY 2025: Widen the existing 5 foot wide sidewalk on Pompano Terrace from Shreve Street to US 41 to meet the link from the Shreve Street Path to the US 41 Path. Projected costs – Total \$188,000: Design - \$23,000; Project Management - \$5,000; Construction - \$160,000</p> <p>Funding: \$355,000 – 1% Sales Tax</p> <p>Shreve Street links the Linear Park path to the US 41 Path of the Punta Gorda Pathways system. The addition of path lighting will enhance safety and security of the pathway encouraging more utilization in the sunrise and twilight hours.</p>	
Priority:	Infrastructure Sustainability	
Goal:	Complete the 18-mile pedestrian/bicycle pathway connecting all neighborhoods through collaboration with applicable granting agencies and City investment in pathways.	

Financial Information							
5 Year Plan	Total	Prior	FY 2022	FY 2023	FY 2024	FY 2025	FY 2026
Project Costs							
Planning							
Design	\$28,000	\$5,000	\$0	\$0	\$0	\$23,000	\$0
Construction	\$327,000	\$220,000	\$0	\$0	\$0	\$107,000	\$0
Equipment							
Total	\$355,000	\$225,000	\$0	\$0	\$0	\$130,000	\$0
Funding Sources							
Local-ST	\$355,000	\$225,000	\$0	\$0	\$0	\$130,000	\$0
Impacts on Operations (negative entry indicates operating reduction)							
Personnel							
Contractual							
Equipment							
Electric, maint	\$26,500	\$0	\$4,500	\$4,500	\$4,500	\$4,500	\$8,500

Dept/Div:	City Manager/Urban Design
Contact:	Joan LeBeau
Project Title:	Complete Street - Cooper Street Improvements
Project Code:	COOCOM
Account #:	118-3007-541-6516
Description/Justification:	<p>Design and construct improvements to Cooper Street from Airport Road to East Marion Avenue (US 17 SB) providing sidewalks, bicycle facilities, decorative street lights, and street trees.</p> <p>Planning Estimates - Total \$3,397,000 Design - \$397,000 Railroad Crossings - \$500,000 All other Construction - \$2,100,000 Permit - \$10,000 Engineering Services - \$10,000 Contingency - \$290,000 Project Management - \$100,000</p> <p>Funding: \$ 90,000 1% Sales Tax \$991,000 Tier 2 Request UNFUNDED \$2,316,000 UNFUNDED</p> <p>A continuation of Punta Gorda Pathways, this “leg” would be the East Punta Gorda connection. The addition of path lighting will enhance safety and security of the pathway, encouraging more utilization in the sunrise and twilight hours.</p>
Priority:	Infrastructure Sustainability
Goal:	Complete the 18-mile pedestrian/bicycle pathway connecting all neighborhoods through collaboration with applicable granting agencies and City investment in pathways by June 2022.



Financial Information							
5 Year Plan	Total	Prior	FY 2022	FY 2023	FY 2024	FY 2025	FY 2026+
Project Costs							
Planning	\$90,000	\$90,000	\$0	\$0	\$0	\$0	\$0
Design	\$307,000	\$0	\$0	\$0	\$0	\$0	\$307,000
Construction	\$3,000,000	\$0	\$0	\$0	\$0	\$0	\$3,000,000
Total	\$3,397,000	\$90,000	\$0	\$0	\$0	\$0	\$3,307,000
Funding Sources							
Local – ST	\$90,000	\$90,000	\$0	\$0	\$0	\$0	TBD
UNFUNDED	TBD	\$0	\$0	\$0	\$0	\$0	TBD
Impacts on Operations (negative entry indicates operating reduction)							
Mowing, maint. & electric \$6,000 per yr once completed	\$0	\$0	\$0	\$0	\$0	\$0	\$0

Dept/Div:	City Manager/Urban Design
Contact:	Joan LeBeau
Project Title:	Complete Street - US 17 Improvements
Project Code:	TBD
Account #:	TBD
Description/Justification:	<p>FY 2025: FDOT pre-design and environmental studies. FY 2026: Design Complete Streets along East Marion Avenue from Cooper Street to Cross St (US 41NB) and along East Olympia Ave between Cooper Street to Cross St (US 41NB). Improvements include sidewalks, street lighting, bicycle lanes, intersection treatments and enhanced crosswalks. FY 2027: Construction.</p> <p>NOTE: This project is on the MPO list for funding project development and environmental study (PD&E) in 2024-2025. It is anticipated that design & construction will be initiated by FDOT as part of its regular roadway resurfacing activities as a project in line with FDOT Complete Streets policy. Potential City obligation is estimated at \$500,000 plus \$19,000 project management.</p> <p>Funding: \$519,000 1% Sales Tax \$2,500,000 FDOT Grant Request – Unfunded</p> <p>Project implements the City of Punta Gorda and the Florida Department of Transportation (FDOT) Complete Streets policies.</p>
Priority:	Infrastructure Sustainability
Goal:	Complete 18-mile pedestrian/bicycle pathway connecting all neighborhoods through collaboration with applicable granting agencies and City investment in pathways by June 2022.



Financial Information							
5 Year Plan	Total	Prior	FY 2022	FY 2023	FY 2024	FY 2025	FY 2026+
Project Costs							
Planning	\$100,000	\$0	\$0	\$0	\$0	\$100,000	\$0
Design	\$419,000	\$0	\$0	\$0	\$0	\$419,000	\$0
Construction	\$2,500,000	\$0	\$0	\$0	\$0	\$0	\$2,500,000
Total	\$3,019,000	\$0	\$0	\$0	\$0	\$519,000	\$2,500,000
Funding Sources							
Local – ST	\$519,000	\$0	\$0	\$0	\$0	\$519,000	\$0
State - G	TBD	\$0	\$0	\$0	\$0	\$0	TBD
Impacts on Operations (negative entry indicates operating reduction)							
Maint and landscape \$5,000 per yr once completed	\$0	\$0	\$0	\$0	\$0	\$0	\$0

Dept/Div:	City Manager/Urban Design/Public Works	
Contact:	Joan LeBeau/Rick Keeney	
Project Title:	Traffic Signal - Burnt Store Rd and Home Depot	
Project Code:	TBD	
Account #:	TBD	
Description/Justification:	<p>To enhance traffic ingress and egress from the Burnt Store Isles commercial center, reducing the burden of cut-thru traffic experienced by the Burnt Store Isles residential neighborhood.</p> <p>Planning Estimates – Total \$1,100,000 Engineering and Design Services - \$345,000 Construction - \$700,000 Contingency - \$55,000</p> <p>Funding: \$345,000 - Sales Tax Tier II Unfunded \$755,000 – Unfunded.</p> <p>Note: Currently this project does not include any ROW or construction easement costs but may be funded from the contingency estimate.</p> <p>At the request of the City of Punta Gorda, Charlotte County conducted a signal warrant study at Burnt Store Rd at Home Depot. The study concluded that a signal met three of the warrant conditions. By the usual traffic engineering metric this intersection warrants the placement of a traffic signal.</p>	
Priority:	Infrastructure Sustainability	
Goal:	Maintain and enhance the City’s infrastructure to ensure efficient and effective service delivery and quality aesthetic appeal.	

Financial Information							
5 Year Plan	Total	Prior	FY 2022	FY 2023	FY 2024	FY 2025	FY 2026
Project Costs							
Planning							
Design	\$345,000	\$0	\$0	\$0	\$0	\$345,000	\$0
Construction	\$755,000	\$0	\$0	\$0	\$0	\$0	\$755,000
Equipment							
Total	\$1,100,000	\$0	\$0	\$0	\$0	\$345,000	\$755,000
Funding Sources							
UNFUNDED	TBD	\$0	\$0	\$0	\$0	TBD	TBD
Impacts on Operations (negative entry indicates operating reduction)							
Routine maint and electric \$8,000 per yr starting in FY 27	\$0	\$0	\$0	\$0	\$0	\$0	\$0

FY 2025 - \$745,000			
1	E Grace St. (Elizabeth St to Cooper St)	11	South Dr. (Boca Grande Blvd to cul-de-sac)
2	E Henry St (w of Manzana to Cooper St)	12	Great Isaac Ct.(Magdalena Dr to cul-de-sac)
3	Narranja St (Myrtle St to Palmera)	13	Freeport Ct.(Magdalena Dr to cul-de-sac)
4	Steadley Ave (Boca Grande to cul-de-sac)	14	Gorda Cay Lane (Via Tripoli to cul-de-sac)
5	Corto Andro (East Dr to Cooper St)	15	Gum Cay Lane (Freeport Ct to cul-de-sac)
6	San Carlos Dr. (Manzana Ave to South Dr)	16	Palm Isles Ct. (Magdalena Dr to cul-de-sac)
7	San Marie Dr (Manzana Ave to East Dr)	17	McKenzie (Berry St to US 41SB)
8	East Dr (Corto Andro to Taylor Rd)	18	Desquin Lane (Alley to W Grace St)
9	Manzana Ave (Henry St to Boca Grande)	19	Rejuvenation (Locations TBD)
10	Boca Grande Blvd (US 41 N to South Dr)	20	Street Re-Bricking – Chasteen (Marion to Olympia Ave)
*Subject to Boca Grande design and construction completion			
FY 2026 - \$750,000			
1	Mineo Dr.(cul-de-sac to cul-de-sac)	13	San Margerita Lane (Appian Dr to cul-de-sac)
2	Via Milanese (Tripoli to cul-de-sac)	14	Via Tunis (Appian Dr to cul-de-sac)
3	Connecta Dr. (Magdalena to Guadalupe)	14	Santana Ct (Juno Dr to cul-de-sac)
4	Roma Ct.(Tuscany Dr to cul-de-sac)	16	Juno Dr (Appian Dr to Santana Ct)
5	Tuscany Dr. (Magdalena Dr to Roma Ct)	17	Winward Ct (Juno Dr to cul-de-sac)
6	Santiago Ct.(Magdalena Dr to cul-de-sac)	18	Santa Bridgida Ct (Appian Dr to cul-de-sac)
7	Park Beach Circle (Marion Ave to Marion Ave)	19	Don Juan Ct (Appian Dr to cul-de-sac)
8	Appian Dr. (Bal Harbor Blvd to cul-de-sac)	20	Lassino Ct. (Appian Dr to cul-de-sac)
9	Napoli (Appian Dr to cul-de-sac)	21	Genoa Ct (Appian Dr to cul-de-sac)
10	Brenda Ct. (Appian Dr to cul-de-sac)	22	Rejuvenation (Locations TBD)
11	San Carlos Lane (Appian Dr to cul-de-sac)	23	Street Re-Bricking – Chasteen Dr (Olympia to Virginia)
12	Pamela Dr (Appian Dr to cul-de-sac)		
			*The Paving Program is Preliminary and subject to change

**GENERAL FUND
VEHICLE & EQUIPMENT REPLACEMENT DETAIL
FY 2022- FY 2026
(All figures in thousands of dollars)**

Capital Outlay Replacement Plan	FY 2022	FY 2023	FY 2024	FY 2025	FY 2026+
(All figures in thousands of dollars)					
Right of Way:					
1999 flatbed 3T dump truck (4409)	95	0	0	0	0
2007 dump truck (5977)	0	143	0	0	0
2007 tractor loader backhoe 4x4 (6835)	0	0	146	0	0
2000 tandem axle trailer low bed (4441)	0	0	9	0	0
2014 diesel mower (6944)	0	0	29	0	0
2016 mower (6982)	0	0	29	0	0
2002 front end articulated loader (5413)	0	0	0	256	0
1988 trailer tilt bed (2350)	0	0	0	9	0
1988 trailer flat bed (2352)	0	0	0	11	0
1989 trailer tilt bed (2396)	0	0	0	6	0
2015 vactor (6969)	0	0	0	85	0
2002 grader (5411)	0	0	0	0	203
Parks & Grounds:					
2014 super duty 4X4 3/4 ton pickup truck (6923)	0	52	0	0	0
2014 1 ton pickup truck (6924)	0	51	0	0	0
2014 1/2 ton pickup truck (6927)	0	42	0	0	0
2014 1/2 ton pickup truck (6928)	0	45	0	0	0
2001 trailer tandem axle low bed (4481)	0	0	11	0	0
1992 trailer low bed (2465)	0	0	6	0	0
2001 trencher walk behind (4473)	0	0	14	0	0
2001 loader skid steer (4480)	0	0	52	0	0
2006 trailer flat bed (5976)	0	0	8	0	0
2006 mini excavator trackhoe (6801)	0	0	52	0	0
2007 trailer flat bed tandem axle (6818)	0	0	11	0	0
2007 riding mower (6839)	0	0	21	0	0
2010 mower (6862)	0	0	21	0	0
2015 cargo van (6954)	0	0	0	52	0
2015 1/2 ton pickup truck (6960)	0	0	0	24	0
Police:					
Police Fleet Replacements (Est. 6 vehicles per year)	318	318	318	318	318
Taser Replacement Program	12	29	29	29	29
Body Camera Replacement Program	20	0	0	21	21
Patrol Rifle Program (new)	32	32	16	0	0
In Car Camera Replacement Program	31	38	46	53	0
SWAT Night Vision Program	10	5	0	0	0
High availability (HA) firewalls for network and internet	23	0	0	0	0
Audio Recording System - Interview rooms	20	0	0	0	0
Radio Enhancement Program	0	70	0	0	0
Boat Motor Replacement Program	0	0	35	0	35
Fire:					
Personal Protective Equipment	10	10	10	10	10
Suppression Equipment	15	15	15	15	15
Medical Equipment	39	16	39	16	39
2014 4 Door SUV (6930)	0	55	0	0	0
Code Compliance:					
2014 pickup truck (6926)	0	30	0	0	0
TOTAL	\$625	\$951	\$917	\$905	\$670
Revised annual level Capital Outlay reserve	840	840	840	840	840
Capital Outlay Reserve - Beg	45	260	149	72	7
Capital Outlay Reserve - End	\$260	\$149	\$72	\$7	\$177
* FY 2021- FY 2025 budgeted capital outlay plan annual level of funding was \$740					
Planned Use of Operating Reserves for equipment for planned new positions in five year plan	\$243	\$296	\$63	\$42	\$164

**PGI CANAL MAINTENANCE FUND
SPECIAL PROJECT PROGRAM
FY 2022 - FY 2026
(All figures in thousands of dollars)**

PROJECT IDENTIFICATION	TOTAL PROJECT COST	Prior Years' Funding	FY 2022	FY 2023	FY 2024	FY 2025	FY 2026
PGI Spoil Site Channel	901	126	0	100	225	225	225
PGI Ponce De Leon Inlet Widening & Dredging	On Hold						
TOTAL		126	0	100	225	225	225

**BSI CANAL MAINTENANCE FUND
SPECIAL PROJECT PROGRAM
FY 2022 - FY 2026
(All figures in thousands of dollars)**

PROJECT IDENTIFICATION	TOTAL PROJECT COST	Prior Years' Funding	FY 2022	FY 2023	FY 2024	FY 2025	FY 2026
BSI Inlet Widening/Removal of Lock	580	80	500	0	0	0	0
UNFUNDED*			(Not Appropriated)				
BSI Channel Corner Widening	725	0	0	100	100	200	325
BSI Land Acquisition for Staging	400	0	0	100	100	100	100
TOTAL		80	500	200	200	300	425

*Note: Unfunded special projects FY 2022 - FY 2026 are not approved or appropriated. Additional research and further discussion is needed.

**UTILITIES OM&R FUND
VEHICLE & EQUIPMENT REPLACEMENT DETAIL
FY 2022 - FY 2026
(All figures in thousands of dollars)**

Capital Outlay	TOTAL PROJECT COST	FY 2022	FY 2023	FY 2024	FY 2025	FY 2026
Water Treatment Plant (1621):						
(4) Portables Generators for RO Wells - new equip	30	30	0	0	0	0
Replacement A/C unit in electrical room	5	5	0	0	0	0
Replace 2001 Vactor Truck with small sport utility vehicle	28	28	0	0	0	0
Replace 2007 Mini Excavator Track	34	34	0	0	0	0
Replace 2006 6x4 Dump Truck	90	0	90	0	0	0
Replace 2006 Batwing Mower	17	0	17	0	0	0
Replace 2009 Electric Car/Golf Cart with All terrain vehicle	10	0	10	0	0	0
Replace 2012 6 x 8 Utility Trailer	14	0	14	0	0	0
Replace 2008 Conventional Cab 2 Door Dump Truck	68	0	0	0	68	0
Replace 2007 Articulated Loader	120	0	0	0	0	120
Replace 2016 4 x 4 Pickup Truck	32	0	0	0	0	32
Pumps, Motors & VFD's	501	109	100	100	92	100
Water Distribution (1626):						
New small pickup (for new AMI technician position)	28	28	0	0	0	0
Replace 2006 Sport Utility Vehicle with full size,crew cab pickup	33	33	0	0	0	0
Replace 2007 Dump Truck	80	0	95	0	0	0
Wastewater Collection (1622):						
Cable Locator & Xmitter, Lights, Load Bank Tester	15	15	0	0	0	0
Replace 2008 3/4 ton Diesel utility body Pickup Truck	65	65	0	0	0	0
Replace 2006 4x4 Diesel 3/4 ton Pickup Truck	45	0	45	0	0	0
Replace 2004 Backhoe	80	0	0	80	0	0
Replace 2007 Mini Excavator	40	0	0	0	40	0
Replace 2017 Vacuum Truck	400	0	0	0	400	0
Wastewater Treatment Plant (1625):						
Pumps, Motors, Mixers, Blowers, Effluent Pumps	522	122	100	100	100	100
Flow meter, raw sampler	15	15	0	0	0	0
Replace 2001 Batwing Mower	20	20	0	0	0	0
Replace 2006 Batwing Rotary Mower	20	20	0	0	0	0
Replace 2006 Sludge Vacuum Spreader	160	160	0	0	0	0
Replace 2005 SUV	50	0	50	0	0	0
Replace All Terrain Vehicle	16	16	0	0	0	0
Unspecified Equipment Needs	947	0	179	420	0	348
TOTAL		700	700	700	700	700

FY 2022 - Per Departmental request; FY 2023-2026 Annual funding is targeted at \$700,000;
FY 2023-2026 Pumps, motors, and various plant equipment category for plants has place holder of \$100,000
During budget process requests from divisions are reviewed for priority funding.

**SANITATION FUND
VEHICLE AND EQUIPMENT REPLACEMENT PROGRAM
FY 2022 - FY 2026
(All figures in thousands of dollars)**

PROJECT IDENTIFICATION	TOTAL PROJECT COST	FY 2022	FY 2023	FY 2024	FY 2025	FY 2026
EQUIPMENT:						
2014 Packer replacement	280	0	280	0	0	0
2014 Packer replacement	294	0	0	294	0	0
2012 Clamshell loader replacement	192	0	0	0	192	0
2008 Flat bed truck w/dump body replacement	64	0	0	0	64	0
2018 Packer replacement	324	0	0	0	0	324
TOTAL		0	280	294	256	324

**BUILDING FUND
VEHICLE AND EQUIPMENT REPLACEMENT PROGRAM
FY 2022 - FY 2026
(All figures in thousands of dollars)**

PROJECT IDENTIFICATION	TOTAL PROJECT COST	FY 2022	FY 2023	FY 2024	FY 2025	FY 2026
EQUIPMENT:						
2006 Pickup Truck, 1/4 ton (Replacement)	25	0	25	0	0	0
*Pickup Truck, 1/4 ton and equipment (for add'l position)	28	0	28	0	0	0
TOTAL		0	53	0	0	0

* This is an add to fleet and equipment for projected new position to be added in FY 2023

**INFORMATION TECHNOLOGY FUND
NEW PROJECTS AND EQUIPMENT DETAIL
FY 2022 - FY 2026
(All figures in thousands of dollars)**

Capital Outlay Replacement Plan	Project Code	TOTAL PROJECT COST	Prior Years	FY 2022	FY 2023	FY 2024	FY 2025	FY 2026
Computer Desktops, laptops, tablets replacements	ITCOMP	453	0	93	90	90	90	90
Monitor Upgrade	ITMONI	50	0	10	10	10	10	10
GIS Tools and Equipment	ITGIS	110	35	15	15	15	15	15
Virtual Host Server replacements	ITVIRT	120	0	30	30	0	30	30
Large Email Extraction Software	ITEVEX	6	0	6	0	0	0	0
Network Switch (spare)	ITNSW	5	0	5	0	0	0	0
Enterprise Security Camera Network (initial funding)	ITSECC	10	0	10	0	0	0	0
Backup and Recovery Appliance (financed over 3 years)	ITRUBK	139	47	46	46	0	0	0
New Projects - Annual Subscriptions								
ESO/Firehouse Activities Module	ITFIRE	25	0	5	5	5	5	5
Internal Affairs Tracking Software	ITIASW	27	0	9	4	4	5	5
Accreditation Software	ITAPSW	24	0	6	4	4	5	5
Virtual Server Management Software	ITVMPM	41	0	8	8	8	8	9
TOTAL			82	243	212	136	168	169

Appendix #6 - Charlotte County School Board 5-Year District Facilities Work Program

INTRODUCTION

The 5-Year District Facilities Work Program is a very important document. The Department of Education, Legislature, Governor's Office, Division of Community Planning (growth management), local governments, and others use the work program information for various needs including funding, planning, and as the authoritative source for school facilities related information.

The district's facilities work program must be a complete, balanced capital outlay plan that is financially feasible. The first year of the work program is the districts capital outlay budget. To determine if the work program is balanced and financially feasible, the "Net Available Revenue" minus the "Funded Projects Costs" should sum to zero for "Remaining Funds".

- If the "Remaining Funds" balance is zero, then the plan is both balanced and financially feasible.
- If the "Remaining Funds" balance is negative, then the plan is neither balanced nor feasible.
- If the "Remaining Funds" balance is greater than zero, the plan may be feasible, but it is not balanced.

Summary of revenue/expenditures available for new construction and remodeling projects only.

	2022 - 2023	2023 - 2024	2024 - 2025	2025 - 2026	2026 - 2027	Five Year Total
Total Revenues	\$0	\$0	\$0	\$0	\$0	\$0
Total Project Costs	\$0	\$0	\$0	\$0	\$0	\$0
Difference (Remaining Funds)	\$0	\$0	\$0	\$0	\$0	\$0

District CHARLOTTE COUNTY SCHOOL DISTRICT

Fiscal Year Range

CERTIFICATION

By submitting this electronic document, we certify that all information provided in this 5-year district facilities work program is accurate, all capital outlay resources are fully reported, and the expenditures planned represent a complete and balanced capital outlay plan for the district. The district Superintendent of Schools, Chief Financial Officer, and the School Board have approved the information contained in this 5-year district facilities work program; they certify to the Department of Education, Office of Educational Facilities, that the information contained herein is correct and accurate; they also certify that the plan has been developed in coordination with the general purpose local governments as required by §1013.35(2) F.S. We understand that any information contained in this 5-year district facilities work program is subject to audit by the Auditor General of the State of Florida.

Date of School Board Adoption 6/13/2023
Work Plan Submittal Date 6/15/2023
DISTRICT SUPERINTENDENT Stephen Dionisio
CHIEF FINANCIAL OFFICER Gregory Griner
DISTRICT POINT-OF-CONTACT PERSON Billy Williams
JOB TITLE Director of Maintenance & Operations
PHONE NUMBER 941-575-5400
E-MAIL ADDRESS billy.williams@yourcharlotteschools.net

Expenditures

Expenditure for Maintenance, Repair and Renovation from 1.50-Mills and PECO

Annually, prior to the adoption of the district school budget, each school board must prepare a tentative district facilities work program that includes a schedule of major repair and renovation projects necessary to maintain the educational and ancillary facilities of the district.

Item	2022 - 2023 Actual Budget	2023 - 2024 Projected	2024 - 2025 Projected	2025 - 2026 Projected	2026 - 2027 Projected	Total
HVAC	\$15,000,000	\$5,120,000	\$5,450,000	\$5,500,000	\$6,000,000	\$37,070,000
Locations:	BENJAMIN J BAKER ELEMENTARY, CHARLOTTE HARBOR SCHOOL, CHARLOTTE SENIOR HIGH, CHARLOTTE TECHNICAL COLLEGE, DEEP CREEK ELEMENTARY, EAST ELEMENTARY, KINGSWAY ELEMENTARY, L A AINGER MIDDLE, LEMON BAY SENIOR HIGH, LIBERTY ELEMENTARY, MEADOW PARK ELEMENTARY, MURDOCK CENTER, MURDOCK MIDDLE, MURDOCK TRANSPORTATION, MYAKKA RIVER ELEMENTARY, NEIL ARMSTRONG ELEMENTARY, PEACE RIVER ELEMENTARY, PORT CHARLOTTE MIDDLE, PORT CHARLOTTE SENIOR HIGH, PUNTA GORDA CENTER, PUNTA GORDA MIDDLE, SALLIE JONES ELEMENTARY, THE ACADEMY, VINELAND ELEMENTARY, WEST COUNTY TRANSPORTATION AND MAINTENANCE					
Flooring	\$1,718,000	\$1,600,000	\$890,000	\$650,000	\$700,000	\$5,558,000
Locations:	BENJAMIN J BAKER ELEMENTARY, CHARLOTTE HARBOR SCHOOL, CHARLOTTE SENIOR HIGH, CHARLOTTE TECHNICAL COLLEGE, DEEP CREEK ELEMENTARY, EAST ELEMENTARY, KINGSWAY ELEMENTARY, L A AINGER MIDDLE, LEMON BAY SENIOR HIGH, LIBERTY ELEMENTARY, MEADOW PARK ELEMENTARY, MURDOCK CENTER, MURDOCK MIDDLE, MURDOCK TRANSPORTATION, MYAKKA RIVER ELEMENTARY, NEIL ARMSTRONG ELEMENTARY, PEACE RIVER ELEMENTARY, PORT CHARLOTTE MIDDLE, PORT CHARLOTTE SENIOR HIGH, PUNTA GORDA CENTER, PUNTA GORDA MIDDLE, SALLIE JONES ELEMENTARY, THE ACADEMY, VINELAND ELEMENTARY, WEST COUNTY TRANSPORTATION AND MAINTENANCE					
Roofing	\$2,513,678	\$2,500,000	\$2,600,000	\$2,700,000	\$2,800,000	\$13,113,678
Locations:	BENJAMIN J BAKER ELEMENTARY, CHARLOTTE HARBOR SCHOOL, CHARLOTTE SENIOR HIGH, CHARLOTTE TECHNICAL COLLEGE, DEEP CREEK ELEMENTARY, EAST ELEMENTARY, KINGSWAY ELEMENTARY, L A AINGER MIDDLE, LEMON BAY SENIOR HIGH, LIBERTY ELEMENTARY, MEADOW PARK ELEMENTARY, MURDOCK CENTER, MURDOCK MIDDLE, MURDOCK TRANSPORTATION, MYAKKA RIVER ELEMENTARY, NEIL ARMSTRONG ELEMENTARY, PEACE RIVER ELEMENTARY, PORT CHARLOTTE MIDDLE, PORT CHARLOTTE SENIOR HIGH, PUNTA GORDA CENTER, PUNTA GORDA MIDDLE, SALLIE JONES ELEMENTARY, THE ACADEMY, VINELAND ELEMENTARY, WEST COUNTY TRANSPORTATION AND MAINTENANCE					
Safety to Life	\$0	\$0	\$0	\$0	\$0	\$0
Locations:	No Locations for this expenditure.					
Fencing	\$0	\$0	\$0	\$0	\$0	\$0
Locations:	No Locations for this expenditure.					
Parking	\$0	\$0	\$0	\$0	\$0	\$0
Locations:	No Locations for this expenditure.					
Electrical	\$0	\$0	\$0	\$0	\$0	\$0
Locations:	No Locations for this expenditure.					
Fire Alarm	\$2,340,000	\$2,000,000	\$1,000,000	\$1,000,000	\$1,000,000	\$7,340,000
Locations:	BENJAMIN J BAKER ELEMENTARY, CHARLOTTE HARBOR SCHOOL, CHARLOTTE SENIOR HIGH, CHARLOTTE TECHNICAL COLLEGE, DEEP CREEK ELEMENTARY, EAST ELEMENTARY, KINGSWAY ELEMENTARY, L A AINGER MIDDLE, LEMON BAY SENIOR HIGH, LIBERTY ELEMENTARY, MEADOW PARK ELEMENTARY, MURDOCK CENTER, MURDOCK MIDDLE, MURDOCK TRANSPORTATION, MYAKKA RIVER ELEMENTARY, NEIL ARMSTRONG ELEMENTARY, PEACE RIVER ELEMENTARY, PORT CHARLOTTE MIDDLE, PORT CHARLOTTE SENIOR HIGH, PUNTA GORDA CENTER, PUNTA GORDA MIDDLE, SALLIE JONES ELEMENTARY, THE ACADEMY, VINELAND ELEMENTARY, WEST COUNTY TRANSPORTATION AND MAINTENANCE					
Telephone/Intercom System	\$137,100	\$500,000	\$500,000	\$500,000	\$500,000	\$2,137,100
Locations:	BENJAMIN J BAKER ELEMENTARY, CHARLOTTE HARBOR SCHOOL, CHARLOTTE SENIOR HIGH, CHARLOTTE TECHNICAL COLLEGE, DEEP CREEK ELEMENTARY, EAST ELEMENTARY, KINGSWAY ELEMENTARY, L A AINGER MIDDLE, LEMON BAY SENIOR HIGH, LIBERTY ELEMENTARY, MEADOW PARK ELEMENTARY, MURDOCK CENTER, MURDOCK MIDDLE, MURDOCK TRANSPORTATION, MYAKKA RIVER ELEMENTARY, NEIL ARMSTRONG ELEMENTARY, PEACE RIVER ELEMENTARY, PORT CHARLOTTE MIDDLE, PORT CHARLOTTE SENIOR HIGH, PUNTA GORDA CENTER, PUNTA GORDA MIDDLE, SALLIE JONES ELEMENTARY, THE ACADEMY, VINELAND ELEMENTARY, WEST COUNTY TRANSPORTATION AND MAINTENANCE					

Closed Circuit Television	\$0	\$0	\$0	\$1	\$0	\$1
Locations:	BENJAMIN J BAKER ELEMENTARY, CHARLOTTE HARBOR SCHOOL, CHARLOTTE SENIOR HIGH, CHARLOTTE TECHNICAL COLLEGE, DEEP CREEK ELEMENTARY, EAST ELEMENTARY, KINGSWAY ELEMENTARY, L A AINGER MIDDLE, LEMON BAY SENIOR HIGH, LIBERTY ELEMENTARY, MEADOW PARK ELEMENTARY, MURDOCK CENTER, MURDOCK MIDDLE, MURDOCK TRANSPORTATION, MYAKKA RIVER ELEMENTARY, NEIL ARMSTRONG ELEMENTARY, PEACE RIVER ELEMENTARY, PORT CHARLOTTE MIDDLE, PORT CHARLOTTE SENIOR HIGH, PUNTA GORDA CENTER, PUNTA GORDA MIDDLE, SALLIE JONES ELEMENTARY, THE ACADEMY, VINELAND ELEMENTARY, WEST COUNTY TRANSPORTATION AND MAINTENANCE					
Paint	\$220,000	\$540,000	\$580,000	\$600,000	\$640,000	\$2,580,000
Locations:	BENJAMIN J BAKER ELEMENTARY, CHARLOTTE HARBOR SCHOOL, CHARLOTTE SENIOR HIGH, CHARLOTTE TECHNICAL COLLEGE, DEEP CREEK ELEMENTARY, EAST ELEMENTARY, KINGSWAY ELEMENTARY, L A AINGER MIDDLE, LEMON BAY SENIOR HIGH, LIBERTY ELEMENTARY, MEADOW PARK ELEMENTARY, MURDOCK CENTER, MURDOCK MIDDLE, MURDOCK TRANSPORTATION, MYAKKA RIVER ELEMENTARY, NEIL ARMSTRONG ELEMENTARY, PEACE RIVER ELEMENTARY, PORT CHARLOTTE MIDDLE, PORT CHARLOTTE SENIOR HIGH, PUNTA GORDA CENTER, PUNTA GORDA MIDDLE, SALLIE JONES ELEMENTARY, THE ACADEMY, VINELAND ELEMENTARY, WEST COUNTY TRANSPORTATION AND MAINTENANCE					
Maintenance/Repair	\$0	\$0	\$0	\$0	\$0	\$0
Locations:	No Locations for this expenditure.					
Sub Total:	\$21,928,778	\$12,260,000	\$11,020,000	\$10,950,001	\$11,640,000	\$67,798,779

PECO Maintenance Expenditures	\$0	\$0	\$0	\$0	\$0	\$0
1.50 Mill Sub Total:	\$48,469,568	\$22,425,000	\$20,595,000	\$21,275,001	\$21,590,001	\$134,354,570

Other Items	2022 - 2023 Actual Budget	2023 - 2024 Projected	2024 - 2025 Projected	2025 - 2026 Projected	2026 - 2027 Projected	Total
385-Paving	\$1,000,000	\$990,000	\$700,000	\$650,000	\$750,000	\$4,090,000
Locations	BENJAMIN J BAKER ELEMENTARY, CHARLOTTE HARBOR SCHOOL, CHARLOTTE SENIOR HIGH, CHARLOTTE TECHNICAL COLLEGE, DEEP CREEK ELEMENTARY, EAST ELEMENTARY, KINGSWAY ELEMENTARY, L A AINGER MIDDLE, LEMON BAY SENIOR HIGH, LIBERTY ELEMENTARY, MEADOW PARK ELEMENTARY, MURDOCK CENTER, MURDOCK MIDDLE, MURDOCK TRANSPORTATION, MYAKKA RIVER ELEMENTARY, NEIL ARMSTRONG ELEMENTARY, PEACE RIVER ELEMENTARY, PORT CHARLOTTE MIDDLE, PORT CHARLOTTE SENIOR HIGH, PUNTA GORDA CENTER, PUNTA GORDA MIDDLE, SALLIE JONES ELEMENTARY, THE ACADEMY, VINELAND ELEMENTARY, WEST COUNTY TRANSPORTATION AND MAINTENANCE					
383-Small Renovation Projects	\$10,529,000	\$3,600,000	\$3,300,000	\$4,200,000	\$4,000,000	\$25,629,000
Locations	BENJAMIN J BAKER ELEMENTARY, CHARLOTTE HARBOR SCHOOL, CHARLOTTE SENIOR HIGH, CHARLOTTE TECHNICAL COLLEGE, DEEP CREEK ELEMENTARY, EAST ELEMENTARY, KINGSWAY ELEMENTARY, L A AINGER MIDDLE, LEMON BAY SENIOR HIGH, LIBERTY ELEMENTARY, MEADOW PARK ELEMENTARY, MURDOCK CENTER, MURDOCK MIDDLE, MURDOCK TRANSPORTATION, MYAKKA RIVER ELEMENTARY, NEIL ARMSTRONG ELEMENTARY, PEACE RIVER ELEMENTARY, PORT CHARLOTTE MIDDLE, PORT CHARLOTTE SENIOR HIGH, PUNTA GORDA CENTER, PUNTA GORDA MIDDLE, SALLIE JONES ELEMENTARY, THE ACADEMY, VINELAND ELEMENTARY, WEST COUNTY TRANSPORTATION AND MAINTENANCE					
366-ADA	\$20,000	\$50,000	\$50,000	\$50,000	\$50,000	\$220,000
Locations	BENJAMIN J BAKER ELEMENTARY, CHARLOTTE HARBOR SCHOOL, CHARLOTTE SENIOR HIGH, CHARLOTTE TECHNICAL COLLEGE, DEEP CREEK ELEMENTARY, EAST ELEMENTARY, KINGSWAY ELEMENTARY, L A AINGER MIDDLE, LEMON BAY SENIOR HIGH, LIBERTY ELEMENTARY, MEADOW PARK ELEMENTARY, MURDOCK CENTER, MURDOCK MIDDLE, MURDOCK TRANSPORTATION, MYAKKA RIVER ELEMENTARY, NEIL ARMSTRONG ELEMENTARY, PEACE RIVER ELEMENTARY, PORT CHARLOTTE MIDDLE, PORT CHARLOTTE SENIOR HIGH, PUNTA GORDA CENTER, PUNTA GORDA MIDDLE, SALLIE JONES ELEMENTARY, THE ACADEMY, VINELAND ELEMENTARY, WEST COUNTY TRANSPORTATION AND MAINTENANCE					
376-Athletic Field Improvements	\$3,591,790	\$1,000,000	\$1,000,000	\$1,000,000	\$1,000,000	\$7,591,790
Locations	CHARLOTTE SENIOR HIGH, LEMON BAY SENIOR HIGH, PORT CHARLOTTE SENIOR HIGH					

337-Playgrounds/Bleachers		\$1,600,000	\$1,025,000	\$1,025,000	\$925,000	\$650,000	\$5,225,000
Locations	BENJAMIN J BAKER ELEMENTARY, CHARLOTTE HARBOR SCHOOL, CHARLOTTE SENIOR HIGH, CHARLOTTE TECHNICAL COLLEGE, DEEP CREEK ELEMENTARY, EAST ELEMENTARY, KINGSWAY ELEMENTARY, L A AINGER MIDDLE, LEMON BAY SENIOR HIGH, LIBERTY ELEMENTARY, MEADOW PARK ELEMENTARY, MURDOCK CENTER, MURDOCK MIDDLE, MURDOCK TRANSPORTATION, MYAKKA RIVER ELEMENTARY, NEIL ARMSTRONG ELEMENTARY, PEACE RIVER ELEMENTARY, PORT CHARLOTTE MIDDLE, PORT CHARLOTTE SENIOR HIGH, PUNTA GORDA CENTER, PUNTA GORDA MIDDLE, SALLIE JONES ELEMENTARY, THE ACADEMY, VINELAND ELEMENTARY, WEST COUNTY TRANSPORTATION AND MAINTENANCE						
337-Security Projects		\$5,100,000	\$2,500,000	\$2,500,000	\$2,500,000	\$2,500,000	\$15,100,000
Locations	BENJAMIN J BAKER ELEMENTARY, CHARLOTTE HARBOR SCHOOL, CHARLOTTE SENIOR HIGH, CHARLOTTE TECHNICAL COLLEGE, DEEP CREEK ELEMENTARY, EAST ELEMENTARY, KINGSWAY ELEMENTARY, L A AINGER MIDDLE, LEMON BAY SENIOR HIGH, LIBERTY ELEMENTARY, MEADOW PARK ELEMENTARY, MURDOCK CENTER, MURDOCK MIDDLE, MURDOCK TRANSPORTATION, MYAKKA RIVER ELEMENTARY, NEIL ARMSTRONG ELEMENTARY, PEACE RIVER ELEMENTARY, PORT CHARLOTTE MIDDLE, PORT CHARLOTTE SENIOR HIGH, PUNTA GORDA CENTER, PUNTA GORDA MIDDLE, SALLIE JONES ELEMENTARY, THE ACADEMY, VINELAND ELEMENTARY, WEST COUNTY TRANSPORTATION AND MAINTENANCE						
384-AV Equipment & Installation		\$4,700,000	\$1,000,000	\$1,000,000	\$1,000,000	\$1,000,000	\$8,700,000
Locations	BENJAMIN J BAKER ELEMENTARY, CHARLOTTE HARBOR SCHOOL, CHARLOTTE SENIOR HIGH, CHARLOTTE TECHNICAL COLLEGE, DEEP CREEK ELEMENTARY, EAST ELEMENTARY, KINGSWAY ELEMENTARY, L A AINGER MIDDLE, LEMON BAY SENIOR HIGH, LIBERTY ELEMENTARY, MEADOW PARK ELEMENTARY, MURDOCK CENTER, MURDOCK MIDDLE, MURDOCK TRANSPORTATION, MYAKKA RIVER ELEMENTARY, NEIL ARMSTRONG ELEMENTARY, PEACE RIVER ELEMENTARY, PORT CHARLOTTE MIDDLE, PORT CHARLOTTE SENIOR HIGH, PUNTA GORDA CENTER, PUNTA GORDA MIDDLE, SALLIE JONES ELEMENTARY, THE ACADEMY, VINELAND ELEMENTARY, WEST COUNTY TRANSPORTATION AND MAINTENANCE						
Ending Balance		\$0	\$0	\$0	\$0	\$1	\$1
Locations	BENJAMIN J BAKER ELEMENTARY, CHARLOTTE HARBOR SCHOOL, CHARLOTTE SENIOR HIGH, CHARLOTTE TECHNICAL COLLEGE, DEEP CREEK ELEMENTARY, EAST ELEMENTARY, KINGSWAY ELEMENTARY, L A AINGER MIDDLE, LEMON BAY SENIOR HIGH, LIBERTY ELEMENTARY, MEADOW PARK ELEMENTARY, MURDOCK CENTER, MURDOCK MIDDLE, MURDOCK TRANSPORTATION, MYAKKA RIVER ELEMENTARY, NEIL ARMSTRONG ELEMENTARY, PEACE RIVER ELEMENTARY, PORT CHARLOTTE MIDDLE, PORT CHARLOTTE SENIOR HIGH, PUNTA GORDA CENTER, PUNTA GORDA MIDDLE, SALLIE JONES ELEMENTARY, THE ACADEMY, VINELAND ELEMENTARY, WEST COUNTY TRANSPORTATION AND MAINTENANCE						
Total:		\$48,469,568	\$22,425,000	\$20,595,000	\$21,275,001	\$21,590,001	\$134,354,570

Local 1.50 Mill Expenditure For Maintenance, Repair and Renovation

Anticipated expenditures expected from local funding sources over the years covered by the current work plan.

Item	2022 - 2023 Actual Budget	2023 - 2024 Projected	2024 - 2025 Projected	2025 - 2026 Projected	2026 - 2027 Projected	Total
Remaining Maint and Repair from 1.5 Mills	\$48,469,568	\$22,425,000	\$20,595,000	\$21,275,001	\$21,590,001	\$134,354,570
Maintenance/Repair Salaries	\$4,250,000	\$4,300,000	\$4,350,000	\$4,400,000	\$4,500,000	\$21,800,000
School Bus Purchases	\$3,293,978	\$2,000,000	\$2,100,000	\$2,300,000	\$2,500,000	\$12,193,978
Other Vehicle Purchases	\$1,228,350	\$425,000	\$425,000	\$450,000	\$600,000	\$3,128,350
Capital Outlay Equipment	\$50,000	\$50,000	\$50,000	\$50,000	\$50,000	\$250,000
Rent/Lease Payments	\$0	\$0	\$0	\$0	\$0	\$0
COP Debt Service	\$0	\$0	\$0	\$0	\$0	\$0
Rent/Lease Relocatables	\$125,000	\$100,000	\$200,000	\$100,000	\$120,000	\$645,000
Environmental Problems	\$0	\$0	\$0	\$0	\$0	\$0
s.1011.14 Debt Service	\$2,000	\$0	\$0	\$0	\$0	\$2,000
Special Facilities Construction Account	\$0	\$0	\$0	\$0	\$0	\$0
Premiums for Property Casualty Insurance - 1011.71 (4a,b)	\$1,950,000	\$2,000,000	\$2,050,000	\$2,100,000	\$2,150,000	\$10,250,000
Qualified School Construction Bonds (QSCB)	\$3,975,000	\$4,000,000	\$4,000,000	\$4,000,000	\$4,000,000	\$19,975,000

Qualified Zone Academy Bonds (QZAB)	\$242,709	\$0	\$0	\$0	\$0	\$242,709
368-Vocational Equipment	\$282,188	\$140,000	\$150,000	\$200,000	\$250,000	\$1,022,188
375-High School Equipment	\$183,000	\$83,000	\$83,000	\$83,000	\$100,000	\$532,000
386-Copiers	\$172,500	\$100,000	\$150,000	\$190,000	\$350,000	\$962,500
Ending Fund Balance	\$16,676,129	\$13,950,000	\$13,950,000	\$15,000,000	\$15,080,000	\$74,656,129
364-School Radios/AED's	\$145,432	\$50,000	\$50,000	\$50,000	\$50,000	\$345,432
396-Facilities Department Staff	\$500,000	\$520,000	\$540,000	\$560,000	\$515,000	\$2,635,000
380-District-wide Furniture and Equipment	\$650,800	\$750,000	\$800,000	\$850,000	\$1,270,000	\$4,320,800
371-Middle School Equipment	\$40,000	\$40,000	\$40,000	\$40,000	\$40,000	\$200,000
379-Custodial Equipment	\$200,000	\$75,000	\$75,000	\$75,000	\$75,000	\$500,000
700-District Technology Plan	\$12,400,000	\$9,903,900	\$10,007,772	\$10,000,000	\$10,250,000	\$52,561,672
372-Elementary Equipment	\$30,000	\$30,000	\$30,000	\$30,000	\$30,000	\$150,000
314-Land	\$198,000	\$202,283	\$166,511	\$391,755	\$475,845	\$1,434,394
390-ESE Equipment	\$4,000	\$10,000	\$10,000	\$10,000	\$10,000	\$44,000
Local Expenditure Totals:	\$95,068,654	\$61,154,183	\$59,822,283	\$62,154,756	\$64,005,846	\$342,205,722

Revenue

1.50 Mill Revenue Source

Schedule of Estimated Capital Outlay Revenue from each currently approved source which is estimated to be available for expenditures on the projects included in the tentative district facilities work program. All amounts are NET after considering carryover balances, interest earned, new COP's, 1011.14 and 1011.15 loans, etc. Districts cannot use 1.5-Mill funds for salaries except for those explicitly associated with maintenance/repair projects. (1011.71 (5), F.S.)

Item	Fund	2022 - 2023 Actual Value	2023 - 2024 Projected	2024 - 2025 Projected	2025 - 2026 Projected	2026 - 2027 Projected	Total
(1) Non-exempt property assessed valuation		\$28,460,112,934	\$30,368,251,046	\$31,336,465,656	\$32,956,238,975	\$33,512,551,541	\$156,633,620,152
(2) The Millage projected for discretionary capital outlay per s.1011.71		1.50	1.50	1.50	1.50	1.50	
(3) Full value of the 1.50-Mill discretionary capital outlay per s.1011.71		\$47,812,990	\$51,018,662	\$52,645,262	\$55,366,481	\$56,301,087	\$263,144,482
(4) Value of the portion of the 1.50-Mill ACTUALLY levied	370	\$40,982,563	\$43,730,282	\$45,124,511	\$47,456,984	\$48,258,074	\$225,552,414
(5) Difference of lines (3) and (4)		\$6,830,427	\$7,288,380	\$7,520,751	\$7,909,497	\$8,043,013	\$37,592,068

PECO Revenue Source

The figure in the row designated "PECO Maintenance" will be subtracted from funds available for new construction because PECO maintenance dollars cannot be used for new construction.

Item	Fund	2022 - 2023 Actual Budget	2023 - 2024 Projected	2024 - 2025 Projected	2025 - 2026 Projected	2026 - 2027 Projected	Total
PECO New Construction	340	\$0	\$0	\$0	\$0	\$0	\$0

PECO Maintenance Expenditures		\$0	\$0	\$0	\$0	\$0	\$0
		\$0	\$0	\$0	\$0	\$0	\$0

CO & DS Revenue Source

Revenue from Capital Outlay and Debt Service funds.

Item	Fund	2022 - 2023 Actual Budget	2023 - 2024 Projected	2024 - 2025 Projected	2025 - 2026 Projected	2026 - 2027 Projected	Total
CO & DS Cash Flow-through Distributed	360	\$643,800	\$643,800	\$643,800	\$643,800	\$643,800	\$3,219,000
CO & DS Interest on Undistributed CO	360	\$3,972	\$3,972	\$3,972	\$3,972	\$3,972	\$19,860
		\$647,772	\$647,772	\$647,772	\$647,772	\$647,772	\$3,238,860

Fair Share Revenue Source

All legally binding commitments for proportionate fair-share mitigation for impacts on public school facilities must be included in the 5-year district work program.

Nothing reported for this section.

Sales Surtax Referendum

Specific information about any referendum for a 1-cent or ½-cent surtax referendum during the previous year.

Did the school district hold a surtax referendum during the past fiscal year 2021 - 2022? No

Additional Revenue Source

Any additional revenue sources

Item	2022 - 2023 Actual Value	2023 - 2024 Projected	2024 - 2025 Projected	2025 - 2026 Projected	2026 - 2027 Projected	Total
Proceeds from a s.1011.14/15 F.S. Loans	\$0	\$0	\$0	\$0	\$0	\$0
District Bonds - Voted local bond referendum proceeds per s.9, Art VII State Constitution	\$0	\$0	\$0	\$0	\$0	\$0
Proceeds from Special Act Bonds	\$0	\$0	\$0	\$0	\$0	\$0
Estimated Revenue from CO & DS Bond Sale	\$0	\$0	\$0	\$0	\$0	\$0
Proceeds from Voted Capital Improvements millage	\$0	\$0	\$0	\$0	\$0	\$0
Other Revenue for Other Capital Projects	\$52,228	\$0	\$0	\$0	\$0	\$52,228
Proceeds from 1/2 cent sales surtax authorized by school board	\$0	\$0	\$0	\$0	\$0	\$0

Proceeds from local governmental infrastructure sales surtax	\$0	\$0	\$0	\$0	\$0	\$0
Proceeds from Certificates of Participation (COP's) Sale	\$0	\$0	\$0	\$0	\$0	\$0
Classrooms First Bond proceeds amount authorized in FY 1997-98	\$0	\$0	\$0	\$0	\$0	\$0
Classrooms for Kids	\$0	\$0	\$0	\$0	\$0	\$0
District Equity Recognition	\$0	\$0	\$0	\$0	\$0	\$0
Federal Grants	\$0	\$0	\$0	\$0	\$0	\$0
Proportionate share mitigation (actual cash revenue only, not in kind donations)	\$0	\$0	\$0	\$0	\$0	\$0
Impact fees received	\$0	\$0	\$0	\$0	\$0	\$0
Private donations	\$0	\$0	\$0	\$0	\$0	\$0
Grants from local governments or not-for-profit organizations	\$0	\$0	\$0	\$0	\$0	\$0
Interest, Including Profit On Investment	\$100,000	\$100,000	\$100,000	\$100,000	\$100,000	\$500,000
Revenue from Bonds pledging proceeds from 1 cent or 1/2 cent Sales Surtax	\$0	\$0	\$0	\$0	\$0	\$0
Total Fund Balance Carried Forward	\$53,286,091	\$16,676,129	\$13,950,000	\$13,950,000	\$15,000,000	\$112,862,220
General Capital Outlay Obligated Fund Balance Carried Forward From Total Fund Balance Carried Forward	\$0	\$0	\$0	\$0	\$0	\$0
Special Facilities Construction Account	\$0	\$0	\$0	\$0	\$0	\$0
One Cent - 1/2 Cent Sales Surtax Debt Service From Total Fund Balance Carried Forward	\$0	\$0	\$0	\$0	\$0	\$0
Capital Outlay Projects Funds Balance Carried Forward From Total Fund Balance Carried Forward	\$0	\$0	\$0	\$0	\$0	\$0
Subtotal	\$53,438,319	\$16,776,129	\$14,050,000	\$14,050,000	\$15,100,000	\$113,414,448

Total Revenue Summary

Item Name	2022 - 2023 Budget	2023 - 2024 Projected	2024 - 2025 Projected	2025 - 2026 Projected	2026 - 2027 Projected	Five Year Total
Local 1.5 Mill Discretionary Capital Outlay Revenue	\$40,982,563	\$43,730,282	\$45,124,511	\$47,456,984	\$48,258,074	\$225,552,414
PECO and 1.5 Mill Maint and Other 1.5 Mill Expenditures	(\$95,068,654)	(\$61,154,183)	(\$59,822,283)	(\$62,154,756)	(\$64,005,846)	(\$342,205,722)
PECO Maintenance Revenue	\$0	\$0	\$0	\$0	\$0	\$0
Available 1.50 Mill for New Construction	(\$54,086,091)	(\$17,423,901)	(\$14,697,772)	(\$14,697,772)	(\$15,747,772)	(\$116,653,308)

Item Name	2022 - 2023 Budget	2023 - 2024 Projected	2024 - 2025 Projected	2025 - 2026 Projected	2026 - 2027 Projected	Five Year Total
CO & DS Revenue	\$647,772	\$647,772	\$647,772	\$647,772	\$647,772	\$3,238,860

PECO New Construction Revenue	\$0	\$0	\$0	\$0	\$0	\$0
Other/Additional Revenue	\$53,438,319	\$16,776,129	\$14,050,000	\$14,050,000	\$15,100,000	\$113,414,448
Total Additional Revenue	\$54,086,091	\$17,423,901	\$14,697,772	\$14,697,772	\$15,747,772	\$116,653,308
Total Available Revenue	\$0	\$0	\$0	\$0	\$0	\$0

Project Schedules

Capacity Project Schedules

A schedule of capital outlay projects necessary to ensure the availability of satisfactory classrooms for the projected student enrollment in K-12 programs.

Project Description	Location		2022 - 2023	2023 - 2024	2024 - 2025	2025 - 2026	2026 - 2027	Total	Funded
Remodel, renovate, site improvements.	CHARLOTTE HARBOR SCHOOL	Planned Cost:	\$0	\$0	\$227,500	\$0	\$0	\$227,500	No
	Student Stations:		0	0	0	0	0	0	
	Total Classrooms:		0	0	0	0	0	0	
	Gross Sq Ft:		0	0	0	0	0	0	
Remodel, renovate (Buildings 1-12) and new construction and site work	CHARLOTTE TECHNICAL COLLEGE	Planned Cost:	\$0	\$0	\$772,500	\$0	\$0	\$772,500	No
	Student Stations:		0	0	0	0	0	0	
	Total Classrooms:		0	0	0	0	0	0	
	Gross Sq Ft:		0	0	0	0	0	0	
Remodel, renovate, new construction, and site improvements	PORT CHARLOTTE SENIOR HIGH	Planned Cost:	\$0	\$0	\$1,794,500	\$0	\$0	\$1,794,500	No
	Student Stations:		0	0	0	0	0	0	
	Total Classrooms:		0	0	0	0	0	0	
	Gross Sq Ft:		0	0	0	0	0	0	
Remodel, renovate, new construction, and site improvements	PORT CHARLOTTE MIDDLE	Planned Cost:	\$0	\$0	\$26,357,780	\$0	\$0	\$26,357,780	No
	Student Stations:		0	0	0	0	0	0	
	Total Classrooms:		0	0	0	0	0	0	
	Gross Sq Ft:		0	0	0	0	0	0	

Remodel, renovate, new construction, and site improvements	THE ACADEMY	Planned Cost:	\$0	\$0	\$30,000	\$0	\$0	\$30,000	No
	Student Stations:		0	0	0	0	0	0	
	Total Classrooms:		0	0	0	0	0	0	
	Gross Sq Ft:		0	0	0	0	0	0	
Remodel and painting	KINGSWAY ELEMENTARY	Planned Cost:	\$0	\$0	\$42,750	\$0	\$0	\$42,750	No
	Student Stations:		0	0	0	0	0	0	
	Total Classrooms:		0	0	0	0	0	0	
	Gross Sq Ft:		0	0	0	0	0	0	
Remodel, painting, flooring and lighting	LIBERTY ELEMENTARY	Planned Cost:	\$0	\$0	\$332,500	\$0	\$0	\$332,500	No
	Student Stations:		0	0	0	0	0	0	
	Total Classrooms:		0	0	0	0	0	0	
	Gross Sq Ft:		0	0	0	0	0	0	
Remodel, technology, painting and lighting	MYAKKA RIVER ELEMENTARY	Planned Cost:	\$0	\$0	\$505,000	\$0	\$0	\$505,000	No
	Student Stations:		0	0	0	0	0	0	
	Total Classrooms:		0	0	0	0	0	0	
	Gross Sq Ft:		0	0	0	0	0	0	
Remodel, lighting	SALLIE JONES ELEMENTARY	Planned Cost:	\$0	\$0	\$35,000	\$0	\$0	\$35,000	No
	Student Stations:		0	0	0	0	0	0	
	Total Classrooms:		0	0	0	0	0	0	
	Gross Sq Ft:		0	0	0	0	0	0	
Remodel, HVAC	L A AINGER MIDDLE	Planned Cost:	\$0	\$0	\$565,500	\$0	\$0	\$565,500	No
	Student Stations:		0	0	0	0	0	0	
	Total Classrooms:		0	0	0	0	0	0	
	Gross Sq Ft:		0	0	0	0	0	0	
Remodel, painting, technology	CHARLOTTE SENIOR HIGH	Planned Cost:	\$0	\$0	\$58,500	\$0	\$0	\$58,500	No

	Student Stations:	0	0	0	0	0	0	0	
	Total Classrooms:	0	0	0	0	0	0	0	
	Gross Sq Ft:	0	0	0	0	0	0	0	
Remodel, bell system, HVAC	LEMON BAY SENIOR HIGH	Planned Cost:	\$0	\$0	\$802,500	\$0	\$0	\$802,500	No
	Student Stations:	0	0	0	0	0	0	0	
	Total Classrooms:	0	0	0	0	0	0	0	
	Gross Sq Ft:	0	0	0	0	0	0	0	

Planned Cost:	\$0	\$0	\$31,524,030	\$0	\$0	\$31,524,030
Student Stations:	0	0	0	0	0	0
Total Classrooms:	0	0	0	0	0	0
Gross Sq Ft:	0	0	0	0	0	0

Other Project Schedules

Major renovations, remodeling, and additions of capital outlay projects that do not add capacity to schools.

Project Description	Location	2022 - 2023 Actual Budget	2023 - 2024 Projected	2024 - 2025 Projected	2025 - 2026 Projected	2026 - 2027 Projected	Total	Funded
New construction	MURDOCK TRANSPORTATION	\$0	\$0	\$20,000	\$0	\$0	\$20,000	No
Add remodel, renovate & site improvements	PUNTA GORDA CENTER	\$0	\$0	\$325,000	\$0	\$0	\$325,000	No
Remodeling	MURDOCK CENTER	\$0	\$0	\$245,000	\$0	\$0	\$245,000	No
Remodel	WEST COUNTY TRANSPORTATION AND MAINTENANCE	\$0	\$0	\$49,500	\$0	\$0	\$49,500	No
		\$0	\$0	\$639,500	\$0	\$0	\$639,500	

Additional Project Schedules

Any projects that are not identified in the last approved educational plant survey.

Nothing reported for this section.

Non Funded Growth Management Project Schedules

Schedule indicating which projects, due to planned development, that CANNOT be funded from current revenues projected over the next five years.

Nothing reported for this section.

Tracking

Capacity Tracking

Location	2022 - 2023 Satis. Stu. Sta.	Actual 2022 - 2023 FISH Capacity	Actual 2021 - 2022 COFTE	# Class Rooms	Actual Average 2022 - 2023 Class Size	Actual 2022 - 2023 Utilization	New Stu. Capacity	New Rooms to be Added/Removed	Projected 2026 - 2027 COFTE	Projected 2026 - 2027 Utilization	Projected 2026 - 2027 Class Size
SALLIE JONES ELEMENTARY	717	717	668	38	18	93.00 %	0	0	650	91.00 %	17
CHARLOTTE SENIOR HIGH	1,853	1,760	1,781	77	23	101.00 %	0	0	1,700	97.00 %	22
PEACE RIVER ELEMENTARY	861	861	569	47	12	66.00 %	0	0	600	70.00 %	13
CHARLOTTE HARBOR SCHOOL	262	262	112	23	5	43.00 %	0	0	130	50.00 %	6
LEMON BAY SENIOR HIGH	1,428	1,285	1,170	58	20	91.00 %	0	0	1,300	101.00 %	22
BENJAMIN J BAKER ELEMENTARY	324	324	59	18	3	18.00 %	0	0	136	42.00 %	8
EAST ELEMENTARY	861	861	665	47	14	77.00 %	0	0	700	81.00 %	15
NEIL ARMSTRONG ELEMENTARY	861	861	730	47	16	85.00 %	0	0	700	81.00 %	15
PUNTA GORDA MIDDLE	1,401	1,260	1,204	60	20	96.00 %	0	0	1,000	79.00 %	17
PORT CHARLOTTE MIDDLE	1,166	1,049	847	51	17	81.00 %	0	0	800	76.00 %	16
MEADOW PARK ELEMENTARY	865	865	700	47	15	81.00 %	0	0	650	75.00 %	14
PORT CHARLOTTE SENIOR HIGH	1,937	1,840	1,434	79	18	78.00 %	0	0	1,500	82.00 %	19
CHARLOTTE TECHNICAL COLLEGE	789	946	203	43	5	21.00 %	0	0	50	5.00 %	1
L A AINGER MIDDLE	1,076	968	704	47	15	73.00 %	0	0	700	72.00 %	15
VINELAND ELEMENTARY	880	880	600	47	13	68.00 %	0	0	550	62.00 %	12
LIBERTY ELEMENTARY	655	655	551	35	16	84.00 %	0	0	600	92.00 %	17
MURDOCK MIDDLE	954	858	633	42	15	74.00 %	0	0	650	76.00 %	15
MYAKKA RIVER ELEMENTARY	667	667	577	35	16	86.00 %	0	0	600	90.00 %	17
DEEP CREEK ELEMENTARY	884	884	811	47	17	92.00 %	0	0	700	79.00 %	15
KINGSWAY ELEMENTARY	732	732	593	40	15	81.00 %	0	0	600	82.00 %	15

THE ACADEMY	275	292	191	16	12	65.00 %	0	0	250	86.00 %	16
	19,448	18,827	14,802	944	16	78.62 %	0	0	14,566	77.37 %	15

The COFTE Projected Total (14,566) for 2026 - 2027 must match the Official Forecasted COFTE Total (14,566) for 2026 - 2027 before this section can be completed. In the event that the COFTE Projected Total does not match the Official forecasted COFTE, then the Balanced Projected COFTE Table should be used to balance COFTE.

Projected COFTE for 2026 - 2027	
Elementary (PK-3)	4,436
Middle (4-8)	5,715
High (9-12)	4,415
	14,566

Grade Level Type	Balanced Projected COFTE for 2026 - 2027
Elementary (PK-3)	0
Middle (4-8)	0
High (9-12)	0
	14,566

Relocatable Replacement

Number of relocatable classrooms clearly identified and scheduled for replacement in the school board adopted financially feasible 5-year district work program.

Location	2022 - 2023	2023 - 2024	2024 - 2025	2025 - 2026	2026 - 2027	Year 5 Total
THE ACADEMY	0	1	0	0	0	1
Total Relocatable Replacements:	0	1	0	0	0	1

Charter Schools Tracking

Information regarding the use of charter schools.

Location-Type	# Relocatable units or permanent classrooms	Owner	Year Started or Scheduled	Student Stations	Students Enrolled	Years in Contract	Total Charter Students projected for 2026 - 2027
Florida Southwestern State College	11	OTHER	2009	415	342	13	400
Babcock Neighborhood	30	OTHER	2017	564	435	5	719
Babcock High School	26	OTHER	2020	150	353	2	336
	67			1,129	1,130		1,455

Special Purpose Classrooms Tracking

The number of classrooms that will be used for certain special purposes in the current year, by facility and type of classroom, that the district will, 1), not use for educational purposes, and 2), the co-teaching classrooms that are not open plan classrooms and will be used for educational purposes.

School	School Type	# of Elementary K-3 Classrooms	# of Middle 4-8 Classrooms	# of High 9-12 Classrooms	# of ESE Classrooms	# of Combo Classrooms	Total Classrooms
DEEP CREEK ELEMENTARY	Educational	2	0	0	0	0	2

KINGSWAY ELEMENTARY	Educational	7	0	0	0	0	7
PORT CHARLOTTE SENIOR HIGH	Educational	0	0	5	0	0	5
LIBERTY ELEMENTARY	Educational	1	0	0	0	0	1
BENJAMIN J BAKER ELEMENTARY	Educational	1	0	0	0	0	1
PORT CHARLOTTE MIDDLE	Educational	0	5	0	0	0	5
Total Educational Classrooms:		11	5	5	0	0	21

School	School Type	# of Elementary K-3 Classrooms	# of Middle 4-8 Classrooms	# of High 9-12 Classrooms	# of ESE Classrooms	# of Combo Classrooms	Total Classrooms
NEIL ARMSTRONG ELEMENTARY	Co-Teaching	3	5	0	0	0	8
Total Co-Teaching Classrooms:		3	5	0	0	0	8

Infrastructure Tracking

Necessary offsite infrastructure requirements resulting from expansions or new schools. This section should include infrastructure information related to capacity project schedules and other project schedules (Section 4).

Not Specified

Proposed location of planned facilities, whether those locations are consistent with the comprehensive plans of all affected local governments, and recommendations for infrastructure and other improvements to land adjacent to existing facilities. Provisions of 1013.33(12), (13) and (14) and 1013.36 must be addressed for new facilities planned within the 1st three years of the plan (Section 5).

Not Specified

Consistent with Comp Plan? No

Net New Classrooms

The number of classrooms, by grade level and type of construction, that were added during the last fiscal year.

List the net new classrooms added in the 2021 - 2022 fiscal year.					List the net new classrooms to be added in the 2022 - 2023 fiscal year.			
"Classrooms" is defined as capacity carrying classrooms that are added to increase capacity to enable the district to meet the Class Size Amendment.					Totals for fiscal year 2022 - 2023 should match totals in Section 15A.			
Location	2021 - 2022 # Permanent	2021 - 2022 # Modular	2021 - 2022 # Relocatable	2021 - 2022 Total	2022 - 2023 # Permanent	2022 - 2023 # Modular	2022 - 2023 # Relocatable	2022 - 2023 Total
Elementary (PK-3)	0	0	0	0	0	0	0	0
Middle (4-8)	0	0	0	0	0	0	0	0
High (9-12)	0	0	0	0	0	0	0	0
	0	0	0	0	0	0	0	0

Relocatable Student Stations

Number of students that will be educated in relocatable units, by school, in the current year, and the projected number of students for each of the years in the workplan.

Site	2022 - 2023	2023 - 2024	2024 - 2025	2025 - 2026	2026 - 2027	5 Year Average
PORT CHARLOTTE MIDDLE	0	0	0	0	0	0
MEADOW PARK ELEMENTARY	0	0	0	0	0	0
THE ACADEMY	0	25	25	25	25	20
SALLIE JONES ELEMENTARY	0	0	0	0	0	0
CHARLOTTE SENIOR HIGH	0	0	0	0	0	0
PEACE RIVER ELEMENTARY	0	0	0	0	0	0
CHARLOTTE HARBOR SCHOOL	90	90	90	90	0	72
LEMON BAY SENIOR HIGH	0	0	0	0	0	0
MYAKKA RIVER ELEMENTARY	0	0	0	0	0	0
DEEP CREEK ELEMENTARY	213	213	213	213	0	170
KINGSWAY ELEMENTARY	0	0	0	0	0	0
PORT CHARLOTTE SENIOR HIGH	0	0	0	0	0	0
CHARLOTTE TECHNICAL COLLEGE	0	0	0	0	0	0
L A AINGER MIDDLE	0	0	0	0	0	0
VINELAND ELEMENTARY	232	232	232	232	0	186
LIBERTY ELEMENTARY	0	0	0	0	0	0
MURDOCK MIDDLE	0	0	0	0	0	0
BENJAMIN J BAKER ELEMENTARY	0	0	0	0	0	0
EAST ELEMENTARY	0	0	0	0	0	0
NEIL ARMSTRONG ELEMENTARY	0	0	0	0	0	0
PUNTA GORDA MIDDLE	0	0	0	0	0	0

Totals for CHARLOTTE COUNTY SCHOOL DISTRICT						
Total students in relocatables by year.	535	560	560	560	25	448
Total number of COFTE students projected by year.	14,796	14,827	14,694	14,649	14,566	14,706
Percent in relocatables by year.	4 %	4 %	4 %	4 %	0 %	3 %

Leased Facilities Tracking

Existing leased facilities and plans for the acquisition of leased facilities, including the number of classrooms and student stations, as reported in the educational plant survey, that are planned in that location at the end of the five year workplan.

Location	# of Leased Classrooms 2022 - 2023	FISH Student Stations	Owner	# of Leased Classrooms 2026 - 2027	FISH Student Stations
MEADOW PARK ELEMENTARY	0	0		0	0
L A AINGER MIDDLE	0	0		0	0

VINELAND ELEMENTARY	0	0		0	0
MURDOCK MIDDLE	0	0		0	0
MYAKKA RIVER ELEMENTARY	0	0		0	0
DEEP CREEK ELEMENTARY	0	0		0	0
KINGSWAY ELEMENTARY	0	0		0	0
PORT CHARLOTTE SENIOR HIGH	0	0		0	0
LIBERTY ELEMENTARY	0	0		0	0
THE ACADEMY	0	0	Mobile Modular	1	25
CHARLOTTE TECHNICAL COLLEGE	0	0		0	0
CHARLOTTE HARBOR SCHOOL	6	90	Mobile Modular/SGroup	6	90
SALLIE JONES ELEMENTARY	0	0		0	0
CHARLOTTE SENIOR HIGH	0	0		0	0
PEACE RIVER ELEMENTARY	0	0		0	0
LEMON BAY SENIOR HIGH	0	0		0	0
BENJAMIN J BAKER ELEMENTARY	0	0		0	0
EAST ELEMENTARY	0	0		0	0
NEIL ARMSTRONG ELEMENTARY	0	0		0	0
PUNTA GORDA MIDDLE	0	0		0	0
PORT CHARLOTTE MIDDLE	0	0		0	0
	6	90		7	115

Failed Standard Relocatable Tracking

Relocatable units currently reported by school, from FISH, and the number of relocatable units identified as 'Failed Standards'.

Nothing reported for this section.

Planning

Class Size Reduction Planning

Plans approved by the school board that reduce the need for permanent student stations such as acceptable school capacity levels, redistricting, busing, year-round schools, charter schools, magnet schools, public-private partnerships, multitrack scheduling, grade level organization, block scheduling, or other alternatives.

Charlotte County Public Schools' class size reduction planning includes, but is not limited to, remodeling, renovation, new construction, year-round schools, and redistricting in our continued proactive approach to assure compliance with class size reduction requirements.

School Closure Planning

Plans for the closure of any school, including plans for disposition of the facility or usage of facility space, and anticipated revenues.

Charlotte Public Schools currently has no plans to close any schools.

Long Range Planning

Ten-Year Maintenance

District projects and locations regarding the projected need for major renovation, repair, and maintenance projects within the district in years 6-10 beyond the projects plans detailed in the five years covered by the work plan.

Nothing reported for this section.

Ten-Year Capacity

Schedule of capital outlay projects projected to ensure the availability of satisfactory student stations for the projected student enrollment in K-12 programs for the future 5 years beyond the 5-year district facilities work program.

Nothing reported for this section.

Ten-Year Planned Utilization

Schedule of planned capital outlay projects identifying the standard grade groupings, capacities, and planned utilization rates of future educational facilities of the district for both permanent and relocatable facilities.

Grade Level Projections	FISH Student Stations	Actual 2021 - 2022 FISH Capacity	Actual 2021 - 2022 COFTE	Actual 2021 - 2022 Utilization	Actual 2022 - 2023 / 2031 - 2032 new Student Capacity to be added/removed	Projected 2031 - 2032 COFTE	Projected 2031 - 2032 Utilization
Elementary - District Totals	8,307	8,307	6,523.28	78.52 %	0	0	0.00 %

Middle - District Totals	4,872	4,382	3,578.93	81.68 %	0	0	0.00 %
High - District Totals	5,218	4,885	4,385.04	89.76 %	0	0	0.00 %
Other - ESE, etc	1,051	1,208	314.72	26.08 %	0	0	0.00 %
	19,448	18,782	14,801.97	78.81 %	0	0	0.00 %

Combination schools are included with the middle schools for student stations, capacity, COFTE and utilization purposes because these facilities all have a 90% utilization factor. Use this space to explain or define the grade groupings for combination schools.

No comments to report.

Ten-Year Infrastructure Planning

Nothing reported for this section.

Twenty-Year Maintenance

District projects and locations regarding the projected need for major renovation, repair, and maintenance projects within the district in years 11-20 beyond the projects plans detailed in the five years covered by the work plan.

Nothing reported for this section.

Twenty-Year Capacity

Schedule of capital outlay projects projected to ensure the availability of satisfactory student stations for the projected student enrollment in K-12 programs for the future 11-20 years beyond the 5-year district facilities work program.

Nothing reported for this section.

Twenty-Year Planned Utilization

Schedule of planned capital outlay projects identifying the standard grade groupings, capacities, and planned utilization rates of future educational facilities of the district for both permanent and relocatable facilities.

Grade Level Projections	FISH Student Stations	Actual 2021 - 2022 FISH Capacity	Actual 2021 - 2022 COFTE	Actual 2021 - 2022 Utilization	Actual 2022 - 2023 / 2041 - 2042 new Student Capacity to be added/removed	Projected 2041 - 2042 COFTE	Projected 2041 - 2042 Utilization
Elementary - District Totals	8,307	8,307	6,523.28	78.52 %	0	0	0.00 %
Middle - District Totals	4,872	4,382	3,578.93	81.68 %	0	0	0.00 %
High - District Totals	5,218	4,885	4,385.04	89.76 %	0	0	0.00 %
Other - ESE, etc	1,051	1,208	314.72	26.08 %	0	0	0.00 %
	19,448	18,782	14,801.97	78.81 %	0	0	0.00 %

Combination schools are included with the middle schools for student stations, capacity, COFTE and utilization purposes because these facilities all have a 90% utilization factor. Use this space to explain or define the grade groupings for combination schools.

No comments to report.

Twenty-Year Infrastructure Planning

Nothing reported for this section.