



Marion County

Board of County Commissioners

Workshop

Meeting Agenda

Wednesday, March 12, 2025

9:00 AM

Southeastern Livestock Pavilion

Joint Meeting of Marion County Public School, Municipalities and Marion County Board of County Commissioners

INTRODUCTION OF WORKSHOP BY CHAIR LORI CONRAD, MARION COUNTY SCHOOL BOARD

**INVOCATION AND PLEDGE OF ALLEGIANCE BY REVEREND ERIC CUMMINGS,
MARION COUNTY SCHOOL BOARD**

ROLL CALL

MINUTES

1. [March 27, 2024 - Minutes from the Joint Planning Workshop Agenda](#)

WORKSHOP PRESENTATION

1. [Welcome and Opening Comments, Chair Lori Conrad, Marion County School Board](#)
2. [Update, Dr. Diane Gullett, Ed.D., Superintendent of Schools, Marion County Public Schools](#)
3. [Overview, Chair Tracy Straub, Technical Working Group, Assistant County Administrator, Marion County Board of County Commissioners](#)
4. ["Tentative Education Facilities Plan Update" Project Update, Vice Chair Stephen Ayres, Technical Working Group, Director of Student Assignment and Records, Marion County Public Schools](#)

PUBLIC COMMENT

BOARD DISCUSSION AND CLOSING REMARKS



Marion County

Board of County Commissioners Workshop

Agenda Item

File No.: 2025-18410

Agenda Date: 3/12/2025

Agenda No.: 1.

SUBJECT:

March 27, 2024 - Minutes from the Joint Planning Workshop Agenda

RECOMMENDED ACTION:

See attached.

**Official Minutes of
MARION COUNTY
BOARD OF COUNTY COMMISSIONERS**

March 27, 2024

CALL TO ORDER:

The Marion County Board of County Commissioners (BCC) met in a workshop session at 9:15 a.m. on Wednesday, March 27, 2024 at the Southeastern Livestock Pavilion (SELP) located at 2232 NE Jacksonville Road in Ocala, Florida.

INTRODUCTION OF WORKSHOP BY CHAIRMAN MICHELLE STONE

Chairman Stone advised that the joint workshop is scheduled this morning with the Marion County School Board (MCSB).

PLEDGE OF ALLEGIANCE

The meeting opened with invocation by Commissioner McClain and the Pledge of Allegiance to the Flag of our Country.

ROLL CALL

Upon roll call the following members were present: Chairman Michelle Stone, District 5; Vice-Chairman Kathy Bryant, District 2; Commissioner Craig Curry, District 1; Commissioner Matthew McClain, District 3; and Commissioner Carl Zalak, III, District 4. Also present were Chief Assistant County Attorney Dana Olesky; County Administrator Mounir Bouyounes; Assistant County Administrator (ACA) Angel Roussel; ACA Tracy Straub; and ACA Amanda Tart.

The following members of the MCSB were present: Chairman Nancy Thrower, District 4; Vice-Chairman Lori Conrad, District 2; Board Member Allison Campbell, District 1; Board Member Eric Cummings, District 3; and Board Member Sarah James, District 5. Also present were Superintendent of Marion County Schools Dr. Diane Gullett and School Board Attorney Jeremy Powers.

It was noted that members of the various municipalities were present.

The Deputy Clerk was in receipt of a 43 page Agenda packet to follow along with the PowerPoint presentations.

WORKSHOP PRESENTATION

1. Opening Remarks - Mounir Bouyounes, County Administrator
County Administrator Mounir Bouyounes advised that this is the first Joint Workshop since the approval of the Interlocal Agreement (ILA) on February 7, 2023. He stated staff are encountering situations that may require clarification, updating or changes. Mr. Bouyounes advised that he is relying on the Technical Working Group (TWG) to convene and review those concerns, prior to bringing back recommendations to the BCC, MSCB, and municipality Boards/Councils in the future. He commented on the importance of coordinating the siting and construction of new schools moving forward, noting coordination needs to be transparent and executed in concert with all the different staff involved in the discussions.

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2. Overview - Chuck Varadin, Director of Growth Services, Marion County
Director Chuck Varadin, Growth Services, presented a PowerPoint presentation, as seen on the overhead screens. He advised that the Public Schools Planning Officials (PSPO) Joint Planning Workshop provides opportunities for the PSPO to discuss policy, set direction, reach understanding on issues of mutual concern, and coordinate land use and school facilities planning. Mr. Varadin provided an overview of the progress summary leading up to today's workshop.

Chairman Nancy Thrower, MCSB, noted the new ILA was not fully executed by all parties until March 15, 2023.

3. City of Ocala Presentation - Jeff Shrum, Growth Management Director
Growth Management Director Jeff Shrum, City of Ocala, advised that the City is currently working on its 2050 vision, which is the update to the 2035 vision. He commented on population projections, noting Florida Clearinghouse Data (Schimberg) Population Estimates provides estimates for the cities and not just the County overall. Mr. Shrum provided an overview of population estimate data ranging from 2021 to 2050. He commented on an overview of the development approval process and referred to a slide relating to various projects within the City of Ocala.

In response to Commissioner Bryant, Mr. Shrum stated a breakdown of single family residential (SFR) versus (vs.) multi-family residential (MFR) can be provided.

Mr. Shrum provided an overview of the 2023 calendar year (CY) site plan and subdivision approvals throughout the City of Ocala, noting there were approximately 2,500 units. He commented on projects that are still under review (CY 2023), totaling roughly 2,200 units.

Mr. Shrum addressed road construction projects, noting most of the focus has been on SW/NW 44th Avenue. He advised that the goal of the projects is to open a north/south facility parallel to Interstate 75 (I-75) that provides connectivity from State Road (SR) 200 all the way up to Highway 326 to the north. Mr. Shrum stated most of surplus properties in the City of Ocala are smaller lots typically used for SFR. He advised that the City is in the process of developing an application (app) to identify surplus property citywide, noting the City is trying to get those lots incentivized for affordable housing. Mr. Shrum commented on the TWG's ability to better define opportunities on surplus and underutilized properties as the MCSB may be looking at school sites.

Ms. Thrower commented on the slide referencing the Winding Oaks project, noting it is her understanding there will be approximately 2,000 homes on that tract.

In response to Ms. Thrower, Mr. Shrum advised that some of the housing in West Oak will be affordable housing units. He stated for 2023, building permits and certificates of occupancy (CO) are much lower than approved units (roughly 300). There is a timing lag relating to building in addition to some projects going away completely.

Chairman Stone advised that when the TWG reconvenes, they will drill down the figures and bring that data back next year when this entire Board is present for the joint workshop. School Board Member Dr. Sarah James stated the Marion County School Superintendent Dr. Diane Gullet, her staff and others will be working this fall on rezoning lines to accommodate 2 new elementary schools. She noted the importance of obtaining data relating to the number of housing units that may come online to avoid the need to redraw zoning and boundary lines again in a couple of years.

Commissioner Zalak commented on the density relating to the SW 49th Avenue Road corridor, noting in addition to a new school being built, there is other infrastructure like fire stations and trying to build the appropriate road capacity. He addressed the need for

conversation regarding road capacities and how to work together to ensure roadways are still traversable during school hours. Commissioner Zalak commented on issues relating to traffic at Westport High School.

Commissioner Curry questioned the remaining buildout within the City of Ocala. Mr. Shrum advised that the City is currently reviewing data relating to all vacant and underdeveloped properties.

In response to Commissioner Curry, Mr. Shrum advised the City of Ocala is approximately 50 square miles in size.

Ms. Thrower commented on 2 placeholder dates for the TWG to meet, noting they are September 13, and November 6, 2024.

4. Marion County Data Presentation - Chuck Varadin, Director of Growth Services, Marion County

Mr. Varadin stated there was an Administrative Subcommittee to the TWG that met to discuss the data/variables to provide. He referred to a slide showing a list of data, the timeframe the data covers, and the format in which the data was provided. He commented on a map showing the Urban Growth Boundary (UGB) and the Farmland Preservation Area (FPA). Mr. Varadin advised that the County is going through its Evaluation Appraisal Report (EAR) process for the Comprehensive Plan and does not anticipate any changes to the UGB. He referred to a population density base map, noting the animation reflects changes in population from 2015 through 2045. Mr. Varadin commented on increases in the UGB, southwest corridor, Marion Oaks and the City of Ocala. He advised that the population heat map (utilizing the same data) shows that by 2045 the most densely populated area shifts from the City of Ocala to SR 200 by SW 80th Avenue. The map data includes all ages. Mr. Varadin referenced a map displaying residential development by quadrant from January 2016 through December 2023, which indicates the southwest corridor has the greatest number of approved units and building permits.

In response to Commissioner Bryant, Mr. Varadin stated the units have mostly been approved over the past 5 years and are mainly Planned Unit Developments (PUDs) and the building permitting relates to units ready to build.

Mr. Varadin addressed the current year (2023) approved units, noting in this instance, approved means the project has been through the Development Review Committee (DRC). The current year pending units relate to projects pending the DRC process. He stated the residential development map covers the 8 year timeframe from 2016 through 2023 and indicates the southwest corridor is where a lot of the development is occurring. In response to School Board Member Dr. Allison Campbell, Mr. Varadin stated Marion Oaks and Silver Springs Shores (SSS) continue to see growth on the heat map, yet they remain outside of the UGB. He stated as the County goes through the EAR process it will look at Planned Service Areas (PSAs) to possibly help provide some planning and development to those areas.

Commissioner Bryant advised that due to when and how those subdivisions were platted, they have never been part of the UGB, noting it is just how that development came along rather than the intent of the Board.

Mr. Varadin referred to a map of the 5 year Capital Improvement Plan (CIP) roadway improvement projects, which shows a lot of the capacity improvement projects in the general southwest corridor area. He advised of a quick response (QR) code linked to a residential development web map showing the number of units, the unit by type, and the status of the development/project.

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In response to Dr. James, Deputy Director Ken Weyrauch, Growth Services, stated the green dots on the map indicate the projects have building permits, noting some of those are larger developments that will be built in phases; therefore, not all units are in the permitting stage. He advised that the data does not provide a perfect picture of possible impact fees that could be in the pipeline, noting his team is working to better manage and visualize that through the maps and tables.

Commissioner Curry commented on the impacts of the Great Recession and the COVID-19 pandemic on both building and impact fees. He stated the Ocala Metro Chamber and Economic Partnership (CEP) has indicated the County is between 4,000 and 5,000 units short of what is needed based on growth projections, noting there are approximately 269 new residents that move to the County on a weekly basis. He questioned if Mr. Varadin concurred with that figure.

Mr. Varadin stated based on the figures from the Bureau of Economic and Business Research (BEBR), the prediction could be roughly 10,000 new residents annually.

Commissioner Bryant stated a good way to identify if there is a housing shortage is to start with the Marion County Association of Realtors to determine how much inventory is available.

In response to Commissioner Bryant, Councilmember Valerie Hanchar, City of Dunnellon, stated there is an approximate 3 month inventory, noting anything that lists today should take 3 months from list to close. She stated a lot of people are testing the waters trying to get the price they want, and it depends on where the listing is located. Ms. Hanchar stated properties priced between \$200,000.00 and \$350,000.00 are the median, noting she would not consider that affordable.

Commissioner Bryant stated based on the multi-family units being constructed throughout the County she questions whether the County is short on units.

Commissioner Curry commented on data he was provided by realtors relating to a decline in sales due to the increase in interest rates.

Mr. Varadin advised that staff is going to continue working to refine the data.

Chairman Stone stated by the time the TWG comes back together, she hopes the figures will be more specific relating to multi-family units coming online and what is in the pipeline for the benefit of the MCSB's ability to budget.

5. Proposed Table of Contents for the Future Report to the Public-School Planning Officials (PSPO) members - Chuck Varadin and David Herlihy

Mr. Varadin provided a brief overview relating to the proposed table of contents for the future report to the PSPO.

Planning and Governmental Relations Manager David Herlihy, Marion County Public Schools (MCPS), advised that he previously met with Mr. Varadin and some of his staff to discuss the content included in the ILA and the list Mr. Varadin presented earlier. He commented on the supply and demand approach utilized in addition to the related cost and budget data. Mr. Herlihy addressed the likelihood of limitations relating to what the data will enable the parties to do, as well as Mr. Bouyounes' comments relating to changes needed in the ILA itself.

Mr. Varadin clarified that the municipalities provide data, the data is filtered and provided to the MCSB to perform analysis prior to providing the information to the TWG for feedback and vetting purposes before that information is then submitted to the PSPO by the November 30, 2024 deadline.

Chairman Stone advised that the November 30, 2024 deadline provides the PSPO

adequate time to review the information prior to the next meeting sometime during the first quarter of 2025.

6. Marion County Public Schools (MCPS) April 2024 Update: Diane Gullett, Ed.D., Superintendent; Margarete Talbert-Irving, Deputy Superintendent of Curriculum & Instruction; David Herlihy, AICP -- Planning & Governmental Relations Manager; Barbara Dobbins -- Sr. Executive Director of Operations; Theresa Boston-Ellis, Chief Financial Officer

Superintendent Dr. Diane Gullett, MSPS, advised that there are 45,000 students in Marion County that she has the privilege to serve, noting her commitment to ensure everything is being done for students to be successful. She referred to a slide, as seen on the overhead screens, which provides a snapshot of the MCPS 5-Year Strategic Plan. Dr. Gullett stated the MCPS vision statement is "Helping every student succeed". She commented on the different needs students have and meeting those students where they are to ensure they have a choice in the future and that they can be successful in the choices they want for their future. Dr. Gullett addressed the foundations for success and the MCPS goals, noting goal 1 is student success. She stated goals 2 through 5 (safe and positive learning and working environment, talent management, fiscal and operational efficiency, and community engagement and communications) support goal 1. Commissioner Zalak out at 10:11 a.m.

Dr. Gullett provided an overview of MCPS District highlights relating to partnerships, programs, awards, appropriations, grants, coursework and outcomes. She addressed goal 1, noting the MCPS District grade improved to a "B" this year.

Commissioner Zalak back at 10:16 a.m.

Dr. Gullett stated the goal is to move the MCPS District from the bottom third to the top third of the State. She advised that kindergarten readiness increased from 66th to 37th in the State because 2 years ago prekindergarten (Pre-K) was added at every elementary school. Middle school acceleration increased from 34th to 28th in the State and College and Career Acceleration increased from 34th to 29th statewide. The MCPS District experienced a 57% pass rate on Advanced Placement (AP) exams, which is the highest ever. Dr. Gullett commented on goal 2 relating to a safe and positive environment. She advised of a request to accelerate school hardening, noting 96% of those related tasks have been completed. Dr. Gullett addressed the commitment to making sure students are in classrooms, emphasizing the importance of attendance. She expressed appreciation towards various community leaders and members who volunteer, mentor and provide health education as a preventive measure. Goal 3 is talent management. Dr. Gullett commented on partnerships with local universities to provide tuition, fees and books, in addition to paid internships for aspiring educators to complete their college degrees. Goal 4 related to fiscal and operational efficiency. She commented on the use of Elementary and Secondary School Emergency Relief Fund (ESSER) dollars to provide upgrades to classrooms including interactive flat panels, and a grant that made it possible to distribute over 12,000 Chromebooks. Dr. Gullett stated through partnerships, Fitness and Nutrition in Schools (FANS), and the Marion County Hospital District (MCHD), students are growing products that are now being sold and purchased by the Food and Nutrition Services Department. She reiterated the importance of on time delivery to school, noting a 3% increase relating to this measurement. There is an annual savings of \$5,800,000.00 relating to health insurance (due to self-insured status). Goal 5 relates to community engagement. Dr. Gullett advised that there have been 8 career fairs and 3 career expos

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with the CEP/CareerSource. There are 35 community members who participated in Leadership MCPS, and 131 more families participated in Family Focus events.

Mr. Herlihy advised that the PSPO Joint Planning Workshop is an opportunity to review a report prepared by the TWG and consider its recommendations; discuss policy; set direction and reach understandings concerning issues of mutual concern regarding public education and coordination of land use and school facilities planning. He noted that includes, but is not limited to, population and student growth, development trends, school needs, off-site improvements, school capacity, school funding options to reduce the need for additional permanent student stations (to provide for additional permanent student stations), roadway improvements, joint use opportunities, the District Facilities Work Program, and Educational Plant Survey.

Mr. Herlihy stated the MCPS District Facilities Work Program, and Educational Plant Survey are somewhat analogous to the County's Comprehensive Plan and upcoming EAR. He advised that the MCPS District performs its Educational Plant Survey every 5 years, which is an entire inventory including a combination of walkthroughs of the buildings/facilities and review of the databases and other materials. That information is utilized to develop an assessment of facility needs for the next 5 years worth of the 5 year work plans.

Director of Student Assignment and Records Stephen Ayres, MCPS, stated the capacity numbers he will share are based off the 120 enrollment count. He referred to a map depicting elementary school capacity, noting the areas in red are at 90% capacity or higher, the yellow areas are at 80% to 90% capacity and those areas in green are below 80% capacity. Mr. Ayres commented on a map showing middle school capacity (same color coding as the previous map), which shows most of the red area is located in the southwest corridor. The map for high school capacity illustrates the areas over 90% are located in the southwest portion of the County. He advised that the capacity numbers are done every 20 days, and they are posted on the MCPS District website.

Mr. Herlihy referred to a graph representing enrollment history from 2013 to 2024. He stated there was a fairly steady growth rate until COVID-19 hit, noting a dip at that time prior to recovery the following year and significant increases since.

Sr. Executive Director of Operations Barbara Dobbins, MCPS, advised of 4 critical areas impacting school facilities; 1.) growth; 2.) aging buildings; 3.) aging portables; and 4.) deferred maintenance. She stated there has been a 9% growth in enrollment in the past 10 years with rapid growth occurring during the last several years. Ms. Dobbins commented on the Benesch MCPS Long Range School Plan Study, noting it provides an overview of permitting from 1990 through 2021. Permitting has spiked over the last several years and from those, there are 2 averages considered to determine enrollment projections. She stated growth is occurring in high density areas such as the southwest corridor, noting the dark purple color on the map depicts a projection of possibly up to 40,000 new residents in the next 20 years based on the Benesch Long Range School Plan Study. Due to this projected growth, Benesch consultants recommend between 6 to 10 new schools will need to be built in the next 15 years to keep up with enrollment increases related to population growth. Ms. Dobbins advised that this recommendation is based on a range of 2,800 to 3,500 permits averaged per year and a low and high scenario based on the number of portables to be utilized to offset the need for construction. She stated MCPS is taking a conservative approach and recommending a total of 5 new schools and 9 additional classroom wings in the next 15 years. There will be continual reassessment to make appropriate, timely recommendations for future

growth needs as they are forecasted to develop. In the next 4 years 3 new schools will be completed in addition to 4 classroom wings in the high density growth areas of the southwest. The first 2 new schools will be elementary schools; School "W" will be located on the northwest side of Marion Oaks and begin with a capacity of 860 students with a predetermined and plotted expansion area for future classroom development. Ms. Dobbins advised that this school is designed to accommodate just under 1 mile of car rider line space along with plenty of bus drive to keep cars and bus lines off the public roadways. It is anticipated to open in August 2025. School "X" is in the southwest portion of the County in the Winding Oaks area and will also begin with a capacity of 860 students. She stated the school will also have a predetermined and plotted expansion area for future classroom expansion and follow the same layout as the previous elementary school relating to bus and car line space. It is also anticipated that this school will open in August of 2025. To address the high density growth in the southwest area at the middle school level, a new classroom wing is being added at Liberty Middle School, which will provide an additional 352 seats to the current capacity, bringing the total capacity for that school to 1,555. Ms. Dobbins noted this wing is being enhanced to shelter standards and will add approximately 400 spaces for evacuated community members in the case of an emergency that requires sheltering. The wing is on track to open in February 2025. The third new school to be built "CCC" is a high school located on the southeast side of the Marion Oaks area and will begin with a capacity of over 2,000 students. There is a third floor expansion shell and a predetermined and plotted expansion area for future classroom building. This will allow for a future capacity of over 3,000 students. She advised that the project is in the design phase and will include plenty of driving area to minimize car and bus traffic impacts to public roadways. The construction will be enhanced to emergency shelter standards and this facility will serve as the 15th public school to be utilized as an emergency shelter, providing roughly 3,000 spaces for evacuees. Ms. Dobbins stated it is anticipated this school will open in August 2026. There will be a new middle school classroom wing constructed at Horizon Academy of Marion Oaks adding another 352 student seats and bringing total capacity to 1,526. This new wing will be open in August 2027 and is also being built to shelter standards, providing an additional 400 spaces in case of an emergency. She advised that an additional classroom wing will be built at Marion Oaks Elementary School providing 288 to 352 new seats, increasing capacity to roughly 1,300 students. This new wing is anticipated to open in August 2028. Ms. Dobbins stated an additional classroom wing will be constructed at Hammett Bowen Elementary School, increasing capacity to approximately 1,300 students. This wing is also slated to open in August 2028. She advised that Phase 1 of construction spans from the current year through 2028, noting the total estimated cost exceeds \$256,000,000.00. Prior to the start of Phase 2, spanning from 2029 to 2033, MCPS will reevaluate its needs based on updated data projections for that time frame. Based on the Benesch Study, it is anticipated at this time a minimum of 9 new classroom wing additions will be needed at a cost of \$95,850,000.00. Ms. Dobbins addressed Phase 3 of new construction ranging from 2034 through 2038, noting 1 new elementary school and 1 new middle school are anticipated in the southwest area of the County. The estimated cost for those 2 schools is \$147,125,000.00. In total, as of today new construction based on the Benesch Study for high density growth is estimated at roughly \$500,000,000.00. MCPS will adjust accordingly as trends and data are reviewed and reassessed.

Ms. Dobbins stated it is anticipated that Certificate of Participation Funds will be utilized

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for a majority of new construction relating to Phase 1.

School Board Member Lori Conrad questioned the additional requirements relating to schools that also serve as shelters. Ms. Dobbins stated MCPS works directly with Director Preston Bowlin, Emergency Management, Marion County Sheriff's Office, (MCSO), and considers his recommendations for the area as he works with the State. It requires extra funding for the hardening of the buildings (particularly with the windows and projectile resistant coverings, etc.). She stated the inclusion of a generator is the choice of the MCPS, noting they are used to provide emergency lighting, ventilation (fans but not air conditioning (AC)), select receptacles for electricity, in addition to the refrigeration and freezers in the cafeteria used to feed evacuees.

In response to Ms. Conrad, Ms. Dobbins advised that there are 2 special needs shelters as of today, (Lake Weir High School and Westport High School) noting those shelters are for those community members that need continuous access to electricity for medical equipment and so forth. She stated that Emergency Management and the Department of Health (DOH) in Marion County work directly with MCPS. Those shelters require an upgraded generator to ensure there is electricity in addition to extra receptacles to plug in medical equipment. Ms. Dobbins commented on the level of coordination required between the County and MCPS because transportation is provided for the community utilizing buses to deliver individuals to the shelters.

Ms. Conrad stated instructional time was lost last year because schools were shut down a day in advance due to preparations.

School Board Member Eric Cummings advised that in the past, individuals have needed to remain in shelters longer than anticipated, noting other Counties have had partnerships with the municipalities to create a joint shelter (Pasco County), to get evacuees out of school shelters, allowing them to reopen for students.

Commissioner Bryant stated that has occurred 1 time, noting she is in favor of a County Shelter if the funding can be obtained.

Commissioner Zalak stated a better backup plan is a good idea due to issues other than weather that can prevent schools from reopening all the way. He commented on churches and other places that volunteer time or space as possible alternatives.

Chairman Stone stated it is her belief that there is a contract with Central Christian Church now.

School Board Member Allison Campbell commented on the cost of a transfer switch, which was an issue relating to Central Christian Church being used as a shelter option. She stated funding is an issue but there is room for conversation.

Dr. James questioned if there can be a conversation relating to the County and municipalities constructing their new buildings to shelter standards and/or a special needs shelter.

Chairman Stone stated she is unaware of any Marion County building plans, but in the next 20 years that may become a conversation.

Commissioner McClain advised that the Pasco County shelter was funded mostly through the State appropriations process, noting it will take coordination from all parties to push for that type of shelter.

Mr. Cummings commented on evacuees coming inland to Marion County accentuating the need for this type of shelter.

Commissioner Bryant commented on a previous conversation relating to this matter. Mr. Bouyounes advised that the County has been involved in this discussion for over 3 years, noting staff visited the Pasco County shelter and reviewed the funding process relating to

that shelter. He stated it was a coalition between the County, municipalities and the State with the majority of funding coming from the State. Mr. Bouyounes advised that the County is performing some analysis to determine the best location for a multi-use facility that can be converted to a shelter when there is a need. He stated there will be a request for funding from the State.

Ms. Thrower advised that when she toured the Pasco County shelter, it was stated they used that facility for a lot of emergency services training and the building did not sit idle.

Mr. Bouyounes advised that more details will be forthcoming this year relating to the possible site.

Ms. Dobbins commented on the impact of aging facilities relating to academic performance, teacher performance, health and safety. She advised that numerous studies have pointed out that students in deteriorating school buildings score between 5 to 11 percent (%) lower on standardized achievement tests. Some experts believe that the negative impact of substandard school buildings may be cumulative and continue to increase the longer the student attends an older, deteriorating school. Further studies report higher absenteeism due to poor air quality from aging, outdated ventilation systems, and appropriate updated lighting conditions can increase student performance up to 23%. A study regarding acoustics found that third grade students in noisy, old buildings were behind in reading and math compared to students in quieter, newer schools. Ms. Dobbins stated deteriorating schools impact student morale, noting the students are more positive when they move to a new school or renovated building. She advised that research finds poor work conditions relate to poor performance, higher absenteeism, low morale and reduces job satisfaction relating to teachers. Ms. Dobbins provided an overview regarding the ages of MCPS buildings, noting of the 50 schools in the MCPS District the oldest school in operation is 110 years old and was built in 1914, with the newest being 11 years old. She addressed the conditions relating to ancillary buildings and the need to build a new technology center due to the closure of the former District Office.

Ms. Dobbins provided a brief overview of building replacement costs for Phases 1 through 3. She stated there MCPS owns 332 portables and leases 19, noting 246 are used for instructional purposes. This translates to between 4,428 and 6,150 students in a portable at any given point of the school day. Ms. Dobbins advised that portables are intended for temporary purposes, not long-term use. The U.S. Department of Education (ED) defines long-term as anything over 4 years and recommends the replacement of portables older than 20 years. She stated MCPS is currently utilizing portables built as early as 1964 and in June of 2025, all 332 portables owned will be over 20 years old. Ms. Dobbins commented on the impacts of portables including lower attendance, lost time to utilize restrooms in the main building, no covered walks, relocating to hallways during tornado watches or warnings resulting in more lost time. She advised that by placing more portables on campuses, the cafeterias are not adequately sized to handle the increased enrollment with lunch hours spanning from 10:30 a.m. to 1:00 p.m. Ms. Dobbins stated portables are not a financially reasonable investment.

Ms. Dobbins provided an overview of statistics relating to the impacts of deferred maintenance, noting every \$1.00 of deferred preventative maintenance results in \$4.00 of expenditures to repair or replace those building systems.

Ms. Dobbins presented a video relating to the aging facilities throughout the MCPS District. She commented on a portion of the video relating to 44 days without A/C or heat at Ward-Highlands Elementary School because the system was so old, parts were difficult

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to obtain.

Ms. Dobbins provided an overview of the MCPS Facility Plan 2023 through 2038 and a breakdown relating to funding.

Chief Financial Officer (CFO) Theresa Boston-Ellis, MCPS, advised that based on its previous credit rating and the fact that the debt levels are coming down, the MCPS District has determined it can borrow up to \$330,000,000.00 with a Certificate of Participation. She stated the process is occurring now, and MCPS plans to close on the Certificate of Participation in April 2024. Ms. Boston-Ellis advised that in the meantime \$92,000,000.00 has been borrowed, noting building has started relating to the 2 new elementary schools previously discussed. She commented on impact fees relating to debt. Ms. Boston-Ellis stated the financial advisors have estimated that the MCPS District could potentially collect \$37,000,000.00 annually, but they could bond a portion of that in the beginning in order to continue with the buildout after the 5 schools and wings have been addressed. She provided a breakdown of the Certificate of Participation projects and associated costs.

In response to Commissioner Curry, Ms. Boston-Ellis advised that the term of the bond will be 20 years.

Dr. Gullett referred to the overhead screens, noting this picture hangs in her office and is a self-portrait created by a special needs student. She stated the picture represents all students in Marion County.

Councilmember Tim Inskeep, Dunnellon City Council, questioned where the MCPS District is relating to the use of the current technology for remote learning. He commented on the cost of brick and mortar schools, noting there could be a savings relating to 10% to 20% of the student population engaging in remote learning.

Dr. Gullett advised that there is a virtual learning program, Florida Virtual School has a program and MCPS has a partnership with them and currently offers a virtual learning option.

In response to Commissioner Curry, Dr. Gullett advised that a number of existing staff will move to the new buildings, and as students are rezoned into the new buildings, there will be an opportunity to choose to move to the new facilities. She stated hiring will be increased as the County continues to grow, noting retention and hiring will continue to be a priority.

Commissioner Zalak commented on the previous working relationship between the MSCB and the BCC. He expressed concern over stacking lanes and traffic impacts relating to schools. Commissioner Zalak stated citizens are pulling off on the side of 2 lane roads in some areas. He advised that the new elementary school being constructed on SW 49th Avenue is going to slow down traffic in an area that is designed to keep it moving. Commissioner Zalak opined that both Boards should work together for a better community. He commented on staff from both sides being appointed to sit down together and discuss how to make things work. Commissioner Zalak stated the area designated for a high school in Marion Oaks is the same area where the County is trying to possibly locate a flyover. He opined that although there is some stacking inside the schools, it does not solve the problem out in front of the schools during certain times.

Chairman Stone advised that the ILA has provisions relating to this, but has not been followed. She stated the TWG should be hammering out these details before schools are sited. If there is a Comprehensive Plan Amendment changed, those items should come before the BCC, but that has not occurred. Chairman Stone advised that Dr. Gullett has put together the next 2 dates for the TWG to convene, noting she expects that the MSCB

would honor the ILA and follow the processes that have been agreed upon. She stated if changes are needed, she would like to have the latitude to bring them back to the combined Board next year and make changes as necessary.

School Board Attorney Jeremy Powers, MCSB, advised that he will review anything that has not been followed. He stated he believes everything outlined by Commissioner Zalak is accurate, and as the TWG continues to meet, he expects those challenges will resolve. Mr. Powell opined that from the MCSB perspective there is nothing to indicate that the City of Ocala or the County has not followed the ILA, nor could he say either entity could say the MCSB has not followed the ILA. He advised that the ILA should be followed and if there is any disagreement relating to the language or interpretations, the parties will continue to work together to reach an agreement.

Chairman Stone stated there were concerns relating to Section 5 of the ILA.

Mr. Cummings advised that the BCC, MCSB and all municipalities must have great communication and some flexibility.

Commissioner Bryant commented on traffic issues, noting the parties can do better than what was done in the past.

Dr. James stated she is on the Facilities Committee for MCPS, noting the selected sites were identified and planning began prior to the enactment of the ILA. She requested clarification relating to the timeline of events.

Chairman Stone advised that the ILA has been in place since its inception, noting this is the Third Amendment to the ILA. She stated those pieces relating to working together on school sites and identifying the supporting infrastructure necessary have been in place from the beginning.

In response to Dr. James, Chairman Stone advised that the TWG had not been convened by the Superintendent for a very long time and the group was pulled back together and some pieces were amended. She clarified that the pieces being referenced now have always been in place, noting the County has consistently provided data to the MCPS to make decisions relating to selecting sites for schools and planning for growth. Chairman Stone stated if there are desired changes that are allowed by State Statute, they should be brought back when the TWG meets again.

Commissioner Bryant clarified that it was previous Superintendents who did not convene the TWG.

Dr. James opined that this MCSB has been a part of getting the TWG back together and proper planning.

Chairman Stone noted the MCSB has staff that have been in place for longer periods and could make sure the ILA is followed.

Commissioner Zalak commented on the importance of ensuring the experts for both Boards agree that there are adequate turn lanes and stacking capacity for the schools. He stated where there are failures today, the parties should work together to acquire the property or build the necessary turn lanes. Commissioner Zalak advised that the interchange at SW Highway 484 fails, noting the relief factor is the site for the future high school. He stated if traffic is slowed down there, it will create an immense problem for the total community in southwest Marion County. Commissioner Zalak commented on the need for discussion relating to service roads or whatever is needed to mitigate a possible disaster for the community. He stated there is a need for a flyover in the area.

Ms. Campbell stated it is her understanding that staff members for both MCSB and the BCC are having that conversation.

Commissioner Bryant out at 11:45 a.m.

March 27, 2024

Commissioner Zalak advised that if both Boards give collective guidance to staff relating to the vision, the teams will get it done.

PUBLIC COMMENT

Chairman Stone opened the floor to public comment.

There being none, Chairman Stone advised that public comment is now closed.

BOARD/COUNCIL DISCUSSION AND CLOSING COMMENTS

Ms. Hanchar expressed appreciation towards those in attendance. She expressed concern relating to traffic.

Mayor Christine Dobkowski, City of Belleview, expressed appreciation for the hard work put into today's meeting, noting she looks forward to getting new schools built and improvements to existing facilities.

Mr. Cummings commented on the need for this meeting.

Commissioner Bryant returned at 11:48 a.m.

Mr. Cummings stated the BCC and MCSB are on the right page so that the conversations being had will be productive. He expressed appreciation for those in attendance.

Commissioner Zalak stated he looks forward to more groundbreaking ceremonies and commented on the change in direction the MCSB has made through the policies that have been set. He advised that he is excited for kids and the community.

Commissioner Curry commented on the good working relationship between the Boards.

Chairman Stone noted there are issues to address within the ILA and questioned if the TWG can make those changes and come back before the BCC and MCSB without going through the formal process.

Mr. Powell stated at this point it would be difficult. He advised that the BCC, MCSB, and City of Ocala staff have been working to identify issues and come to some agreement as to a resolution. He opined that there is no need for a joint meeting of this body to alter or amend the ILA, noting the language can be drafted and sent to all parties.

In response to Chairman Stone, Mr. Powell advised that if the BCC, MCSB, and the municipalities all agreed to a change, the amendment could be made without anyone convening.

Chairman Stone requested the TWG members review the ILA and be prepared to discuss any adjustments when they reconvene at the first meeting on September 13, 2024.

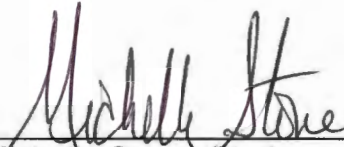
Commissioner Bryant addressed the County's upcoming EAR process and the need to have a conversation relating to school concurrency, noting the recent growth in the County.

Chairman Stone noted that discussion will occur when the County reviews its Comprehensive Plan, which will be occurring over the next 12 to 18 months.

Ms. Thrower advised that concurrency was deemed optional, and it was made clear while working on the ILA that concurrency was not desired. She opined that a lack of concurrency played a role in getting to where the community is now. Ms. Thrower stated there have been no schools built in the last 15 years, but there has been a lot of other construction impacting roads and those who travel them. She advised that if concurrency had been in place and meetings had occurred over the last 11 years, there would be no need for atonement. Ms. Thrower commented on the great working relationship between the various Board and municipality staff.

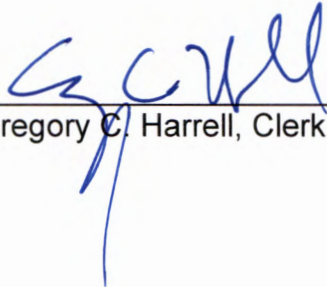
March 27, 2024

There being no further business to come before the Board, the meeting thereupon adjourned at 11:58 a.m.



Michelle Stone, Chairman

Attest:



Gregory C. Harrell, Clerk

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Marion County

Board of County Commissioners Workshop

Agenda Item

File No.: 2025-18408

Agenda Date: 3/12/2025

Agenda No.: 1.

SUBJECT:

Welcome and Opening Comments, Chair Lori Conrad, Marion County School Board



Marion County

Board of County Commissioners Workshop

Agenda Item

File No.: 2025-18409

Agenda Date: 3/12/2025

Agenda No.: 2.

SUBJECT:

Update, Dr. Diane Gullett, Ed.D., Superintendent of Schools, Marion County Public Schools



Marion County

Board of County Commissioners Workshop

Agenda Item

File No.: 2025-18384

Agenda Date: 3/12/2025

Agenda No.: 3.

SUBJECT:

**Overview, Chair Tracy Straub, Technical Working Group, Assistant County Administrator,
Marion County Board of County Commissioners**

RECOMMENDED ACTION:

See attached.

INTERLOCAL AGREEMENT FOR PUBLIC SCHOOL FACILITY PLANNING



Schools



Belleview



Dunnellon



Ocala



McIntosh



Reddick



County

- Florida Statute, Chapters 163 and 1013 require counties, municipalities and school districts to coordinate and share information regarding community growth and development.
- Semi-annual Technical Working Group meetings
- Annual Joint Planning Workshop

**MARION COUNTY THIRD AMENDED AND RESTATED
INTERLOCAL AGREEMENT FOR PUBLIC SCHOOL
FACILITY PLANNING**

This Agreement is entered into between Marion County, Florida; the City of Ocala, the City of Belleview, the City of Dunnellon, the Town of Reddick, and the Town of McIntosh (hereinafter referred to as "Local Governments"), and the School Board of Marion County, Florida (hereinafter referred to as "School Board"). The Local Governments and School Board shall hereinafter be collectively referred to as "The Parties."

WHEREAS, Section 163.31777, Florida Statutes (F.S.), requires each county and its municipalities to enter into an interlocal agreement with the district school board to establish jointly the specific ways in which the plans and processes of the district school board and the local governments are to be coordinated; and

WHEREAS, Section 163.3180, Florida Statutes, addresses optional concurrency provisions and recognizes the School Board may request the Local Governments to exercise such optional provisions; and

WHEREAS, Section 1013.33, F.S., requires the coordination of planning between the Parties, including the integration of the 5-year District Facilities Work Program and applicable policies and procedures of the School Board with the local Comprehensive Plan and land development regulations of the Local Governments; and

WHEREAS, between September and November 2003, The Parties entered into an Interlocal Agreement for public school facility planning as was required by Section 163.31777, F.S.; and

WHEREAS, Chapter 2005-290, Laws of Florida, mandated that public schools be added to the list of public facilities subject to the statewide concurrency system in Chapter 163, Part II of the Florida Statutes, and required that the Public Schools Interlocal Agreement be amended to address the public-school concurrency requirement; and

WHEREAS, on May 1st, 2008, the Marion County Amended and Restated Interlocal Agreement for Public School Facility Planning and School Concurrency executed by Marion County, the School Board and the City of Dunnellon became effective; and

WHEREAS, on September 30th, 2008, the Marion County Second Amended and Restated Interlocal Agreement for Public School Facility Planning and School Concurrency executed among The Parties became effective; and

WHEREAS, subsequent to the execution of the Marion County Second Amended and Restated Interlocal Agreement, the Florida Legislature via Chapter 2011-139, Laws of Florida, repealed the requirements for public-school concurrency and the Public Schools Facility Element, thereby making it optional; and

**MARION COUNTY THIRD AMENDED AND RESTATED
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WHEREAS, in 2011, the Local Governments and the School Board had a general consensus to allow the Local Governments to remove from their Comprehensive Plans the public-school concurrency and Public Schools Facility Element requirements;

WHEREAS, in March 2022, the Parties reconvened the Technical Working Group to propose amendments to the Marion County Second Amended and Restated Interlocal Agreement for Public School Facility Planning in order to comply with Florida Statutes; and

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

WHEREAS, The Parties recognize that by more closely coordinating their comprehensive land use and school facilities planning programs, benefits will flow to citizens and students, by facilitating the following: (1) planning for the construction and opening of public educational facilities is facilitated and coordinated – in time and place - with plans for Residential Development, (2) greater fiscal and operational efficiency for The Parties by siting schools in a manner to take advantage of existing and planned roads, water, sewer, and parks, (3) improved student safety and access by coordinating road and sidewalk construction programs, of the Local Governments, with the construction of new and expanded schools, (4) improved urban form through the siting and designing of schools to serve as community focal points, (5) greater efficiency and convenience by co-locating schools with parks, ballfields, libraries, and other community facilities to take advantage of joint use opportunities, and (6) support of existing neighborhoods through school renovation, expansion of existing schools (in judicious consideration of a school's core capacities and district established maximum capacities) and objectively siting new schools based on sound planning criteria; and

WHEREAS, Sections 163.3177(6)(h) 1 and 2, F.S., require each Local Government to adopt an Intergovernmental Coordination Element (ICE) as part of its Comprehensive Plan. The ICE states principles and guidelines to be used to accomplish coordination of the adopted Comprehensive Plan with the plans of the school boards, and it describes the processes for collaborative planning and decision making on population projections and public-school siting; and

WHEREAS, The Parties enter into this Third Amended and Restated Interlocal Agreement for Public School Facility Planning in fulfillment of statutory requirements and in recognition of the benefits accruing to their citizens and students described above.

NOW, THEREFORE, be it mutually agreed among The Parties that the following procedures will be followed in coordinating land use and public-school facilities planning:

**MARION COUNTY THIRD AMENDED AND RESTATED
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SECTION 1: DEFINITIONS.

- 1.1. Attendance Zone:** The geographic area in which all resident students are assigned to a specific school or region school.
- 1.2. Building Permit:** An approval by a Local Government authorizing residential construction on a specific property.
- 1.3. Capital Outlay, Full-Time Equivalent (COFTE) Projections:** Florida Department of Education (FDOE) COHORT student Enrollment projections for Florida public school districts, issued annually and based on information produced by the demographic, revenue, and education estimating conferences pursuant to s. 216.136 and s. 1013.64(3) F.S, as adjusted by the FDOE Office of Educational Facilities.
- 1.4. Charter School:** A public school that operates under a performance contract, or a "charter" which frees them from many regulations created for traditional public schools while holding them accountable for academic and financial results.
- 1.5. Combination School:** A school that includes any other combination of grades not specified in the Elementary, Middle, and Secondary/high categories, including K-12 schools.
- 1.6. Combination School Capacity:** The estimated number of students (in full-time equivalency) that can be satisfactorily housed in a Combination School at any given time based upon a percentage of the total number of satisfactory Student Stations.
- 1.7. Comprehensive Plan:** A plan that meets the requirements of Section 163.3177 F.S.
- 1.8. Comprehensive Plan Amendment:** Any action of a Local Government which has the effect of amending, adding to, deleting from or changing an adopted Comprehensive Plan element or map or map series, including an action affecting a prior plan or plan amendment adoption ordinance.
- 1.9. Consistent:** A development order, land development regulation or the siting of an Educational Facility shall be consistent with the comprehensive plan if the land uses, densities or intensities, and other aspects of development permitted by such order, regulation or siting are compatible with and further the objectives, policies, land uses, and densities or intensities in the comprehensive plan and if it meets all other criteria enumerated by the local government. A development approved or undertaken by a local government shall be consistent with the comprehensive plan if the land uses, densities or intensities, capacity or size, timing, and other aspects

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of the development are compatible with and further the objectives, policies, land uses, and densities or intensities in the comprehensive plan and if it meets all other criteria enumerated by the local government.

- 1.10. Development Approval:** An approval of a site plan, final subdivision, or functional equivalent issued by a Local Government.
- 1.11. District Facilities Work Program:** The 5-year listing of capital outlay projects adopted by the School Board as provided in Sections 1013.35(2)(a)2. and 1013.35(2)(b), F.S. as part of the Educational Facilities Plan.
- 1.12. Educational Facilities Plan:** The School Board's annual capital planning document for needs over 5-year, 10-year, and 20-year periods.
 - 1.12.1.** Adopted Educational Facilities Plan (AEFP): The comprehensive planning document that is adopted annually by the school board as provided in Sec. 1013.35(2) and that contains the educational plant survey.
 - 1.12.2.** Tentative Educational Facilities Plan (TEFP): The comprehensive planning document prepared annually by the School Board and submitted to the Office of Educational Facilities and the Technical Working Group.
- 1.13. Educational Facility:** The buildings, equipment, structures, ancillary, site improvements, and particular educational use areas built, installed, or established to serve primarily the public educational purposes and secondarily the social and recreational purposes of the community and which may lawfully be used as authorized by the Florida Statutes and approved by boards.
- 1.14. Educational Plant Survey (EPS):** A systematic study approved by the Florida Department of Education (FDOE) of present educational and ancillary plants and the determination of future needs to provide an appropriate educational program and services for each student based on projected capital outlay FTE (COFTE) counts prepared and issued by the FDOE. The EPS report shall include at least an inventory of existing educational and ancillary plants, including safe access facilities; recommendations for existing educational and ancillary plants; recommendations for new educational or ancillary plants, including the general location of each in coordination with the land use plan and safe access facilities; the utilization of school plants based on an extended school day or year-round operation; and such other information as may be required by the Department of Education. The EPS must be submitted as part of the Adopted Educational Facilities Plan.
- 1.15. Elementary School:** A school that offers more of kindergarten through grade 4 than grades 5 through 8 and no grades 9 through 12.

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- 1.16. Enrollment or Membership:** The number of students (Pre-K to 12) enrolled in the Florida public school system based on the 120th instructional day.
- 1.17. Five-Year Capital Facilities Program:** (also Educational Facilities Work Program or Work Program or Five-Year Plan or District Educational Facilities Plan): The financially feasible listing of capital outlay projects for a 5-year period that is adopted by the school board as part of the educational facilities plan. The work program must include a schedule of major repair and renovation projects necessary to maintain educational and ancillary facilities and a schedule of capital outlay projects necessary to ensure availability of satisfactory Student Stations for the projected student Enrollment in K-12 programs.
- 1.18. Five-Year Capital Improvement Plan:** The School Board's annually adopted financially feasible, five-year list of capital improvements that address Student Capacity to achieve and maintain the adopted level of service.
- 1.19. Florida Inventory of School Houses (FISH):** A data, inventory, and numbering system used by the Florida Department of Education, Office of Educational Facilities for parcels of land, buildings, and rooms in public educational facilities to include permanent and portable Student Stations (hereinafter referred to as "FISH").
- 1.20. FISH Permanent Capacity:** The number of students that can be housed in the permanent portion of a school as determined by the design criteria defined in the State Requirements for Educational Facilities (SREF). The criteria is based on the square footage of classroom space divided by the allocated square footage per Student Station and takes into account the 18/22/25 students per classroom requirement of the class size amendment.
- 1.21. FISH Total Capacity:** The number of students that may be housed in a facility (school) at any given time based on using a percentage of the number of existing satisfactory Student Stations and a designated size for each program.
- 1.22. High School:** A school that offers more of grades 9 through 12 than grades 5 through 8 and no kindergarten through grade 4.
- 1.23. Joint Planning Workshop (JPW):** The annual meeting held by the Public-School Planning Officials (PSPO) to review the report issued by the TWG and make recommendations to the School Board 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.

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- 1.24. Local Governments:** Marion County and its Municipalities.
- 1.25. Middle School:** A school that offers more of grades 5 through 8 than higher or lower grades but does not offer both kindergarten through grade 4 and grades 9 through 12.
- 1.26. Municipalities:** All cities and towns in Marion County.
- 1.27. Permanent Student Station:** A designated space within a permanent building or structure that can accommodate a student for an instructional program and is designated satisfactory in FISH data. The total number of Permanent Student Stations at an Educational Facility is determined by the sum of individual Permanent Student Stations. Permanent buildings or structure types are designated by the School Board and include permanently constructed buildings with a life expectancy of 50 years or more and modular buildings, as identified in FISH, with a life expectancy exceeding 35- 49 years.
- 1.28. Program Capacity:** The true number of students that can be housed in the permanent portion of a school. This measurement considers the effects of the class size amendment, the school's ability to utilize space, and the assignment of special programs that require smaller class sizes.
- 1.29. Public School Advisory Committee (PSAC):** A standing committee comprised of at least one staff member appointed by each Local Government and any other persons appointed by the School Superintendent or Designee that will meet on an as needed basis per the School Superintendent's discretion.
- 1.30. Public School Planning Officials (PSPO):** The PSPO members are comprised of the Local Government elected officials from Marion County, the Municipalities, and the Marion County School Board. The PSPO is responsible for the approval and oversight of the interlocal agreement and is required to hold a Joint Planning Workshop at least once a year.
- 1.31. Residential Development:** Any development comprised of dwelling units, in whole or in part, for permanent human habitation.
- 1.32. Redistricting:** Any change to an Attendance Zone boundary.
- 1.33. Satisfactory Permanent Student Stations:** The number of student stations in permanent structures (buildings) identified as being satisfactory in the FDOE FISH Inventory.
- 1.34. School:** An organization of students for instructional purposes on an elementary, middle or junior high school, secondary or high school, or other public-school level

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authorized under rules of the State Board of Education. A school does not include a Charter School.

- 1.35. School Board:** The governing body established under Article IX, Section 4, Florida Constitution.
- 1.36. School Capacity:** The calculation which determines the number of students that can be served within a school building. There are five different calculations for School Capacity:
- 1.36.1.** Satisfactory Permanent Student Stations;
 - 1.36.2.** FISH Permanent Capacity;
 - 1.36.3.** FISH Total Capacity;
 - 1.36.4.** Program Capacity; and
 - 1.36.5.** Combination School Capacity.
- 1.37. School District:** The School District of Marion County is created pursuant to Article IX, Section 4 of the Florida Constitution.
- 1.38. Student Capacity:** For planning purposes, the estimated number of students (in full-time equivalency) that can be satisfactorily housed in a facility at any given time based upon a percentage of the total number of satisfactory Student Stations. Note that Student Capacity is only a measure of Student Stations not of Enrollment.
- 1.39. Student Station:** A satisfactory space within a building or structure designated in FISH can accommodate a student for an instructional program.
- 1.40. School Type:** There are five (5) types of school:
- 1.40.1.** Elementary School;
 - 1.40.2.** Middle School;
 - 1.40.3.** High School;
 - 1.40.4.** Combination School; and
 - 1.40.5.** Other schools.
- 1.41. Superintendent:** The District School Superintendent of Marion County.
- 1.42. Superintendent or Designee:** That person(s) responsible for dispatching responsibilities identified in the Interlocal Agreement which have been attributed to the Superintendent or the Superintendent's Designee.
- 1.43. Technical Working Group (TWG):** A group consisting of staff appointed by the Administrative or Elected Officials of the respective Parties plus one elected official from each governing body. The Superintendent, City/Town Managers, County Administrator (or their designees), Regional Planning Council (RPG), and the Marion County Transportation Planning Organization will also be invited to attend.

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1.44. Temporary Classroom: Also referred to as a relocatable or portable classroom. A room designated in FISH within an Educational Facility that contains Student Stations and where students receive instruction and which, the life expectancy of the structure, also as defined in FISH, is less than 25 years. Temporary Classrooms generally consist of mobile trailer structures or transportable wood frame type structures.

SECTION 2: COLLEGIAL BODIES.

2.1. Technical Working Group (TWG) Meetings. During the first quarter of each calendar year, the Superintendent shall prepare a schedule of semi-annual TWG meetings, provide notice of the meeting dates and location(s) to members of the TWG, invitees and the public, and take the meeting minutes. Each Party shall be responsible for selecting the individual(s) providing representation on behalf of such Party. Any Party to this Agreement may request additional meetings as needed by providing a written request to the Superintendent who shall then provide notification of the requested meetings as set forth above. The TWG shall serve as an advisory group to the PSPO. A standard TWG agenda is included as Exhibit A.

The TWG shall be responsible for preparing a report for consideration by the PSPO. Such report may include a countywide and by Local Government summary of data pertaining to residential housing activity; Development Approvals and trends; population projections; vacant land; underutilized land; and student projections and Enrollment. The report also may evaluate and make recommendations regarding such issues as the location and need for new educational facilities, significant renovation or expansion of existing educational facilities, and closures of educational facilities; ancillary infrastructure improvements needed to support educational facilities and ensure safe access; the consistency of such plans with the local government Comprehensive Plan; and legislative changes.

Prior to convening the first TWG, each Local Government shall provide to the School Superintendent, to the extent possible, a summary of data including but not limited to residential housing activity; Development Approvals and trends; five-year population projections; vacant and underutilized lands; and a list of roadway improvements identified in the Capital Improvements Element (CIE). The Local Government data summary shall be provided by location and, to the maximum extent possible, by Traffic Analysis Zone (TAZ). Subsequent to receipt of the Local Government data summary, the School Superintendent shall transmit to the TWG a compilation of this Local Government data along with School Capacity and Enrollment data for each existing school and by Attendance Zone, planned public school facilities and their School Capacity, School Capacity

**MARION COUNTY THIRD AMENDED AND RESTATED
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increases due to renovations or expansions, and lost School Capacity due to closures.

At the first meeting of each calendar year, the TWG shall select a non-elected official as the chair and vice-chair of the TWG. The chair shall announce the date, time, and location of each meeting. The School Superintendent shall provide all public notices and meeting minutes. The chair shall submit the TWG's final report to the PSPO by November 30 of that year.

An administrative subcommittee of the TWG, consisting of staff, assigned to the TWG and additional Parties' supporting staff as appropriate, shall be engaged throughout the year coordinating and sharing the information as described in Section 4. The TWG administrative subcommittee shall develop a repository, methodology and format for data sharing at their first meeting. This administrative subcommittee shall not be required to provide public notice of meetings.

- 2.2. Public Schools Planning Officials (PSPO) Joint Planning Workshop.** The Joint Planning Workshop with the PSPO shall be held in the first quarter of each calendar year. The Marion County Clerk of Court shall provide public notice and take the meeting minutes. The County Administrator shall provide the date, time, and location of the workshop and set the agenda with the assistance of the TWG. The chair and vice-chair of the PSPO will rotate between the Marion County Board chair and the School Board chair. After the adoption of the interlocal agreement, the first workshop chair will be the Marion County Board chair. The Parties shall select the TWG members (staff and elected officials) within one month after the JPW or at the adoption of the interlocal agreement. A standard JPW agenda is included as Exhibit B.

The Joint Planning Workshop shall provide opportunities for the PSPO to review the TWG report and consider any recommendations, to discuss policy, set direction and reach understandings concerning issues of mutual concern regarding public education, and coordination of land use and school facilities planning, including but not limited to, population and student growth, development trends, school needs, off-site improvements, School Capacity, school funding options to reduce the need for additional Permanent Student Stations, roadway improvements, joint use opportunities, the District Facilities Work Program, and Educational Plant Survey.

- 2.3. Public School Advisory Committee (PSAC).** The School Board will establish a PSAC for the purpose of reviewing potential sites for new schools, proposals for significant renovation or expansion, potential closure of existing schools and joint use opportunities. The Superintendent shall provide public notice to all Parties and take the meeting minutes. Based on information gathered during the review, the PSAC will issue comments to the Superintendent or Designee about

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the merits of the sites. The Local Government can opt out of participating if the geographic area of interest is not within or adjacent to their geographic or service area boundary.

SECTION 3: STUDENT ENROLLMENT AND POPULATION PROJECTIONS.

- 3.1 Population and Student Enrollment Projections.** In fulfilling their respective planning duties, the Parties agree to coordinate and base their plans upon uniform projections of the amount, type, and distribution of population growth and student Enrollment. Five (5)-year population projections on a countywide and Local Government basis and student Enrollment data shall be reviewed annually by the TWG pursuant to Subsection 2.1.
- 3.2 Student Projections.** The Parties agree to use student population projections based on Capital Outlay Full Time Equivalent (COFTE) cohort projections issued by FDOE in the first quarter of each school year. These projections may be modified by the School Board based on local growth and development trends data and projections.
- 3.3 Enrollment projections.** Enrollment projections, and their allocation to each school and to each school Attendance Zone will be annually updated by the School Board and provided to the Local Governments each year as specified in Section 4 of this Agreement.
- 3.4 Impact fees.** The School Board may procure an Educational Facilities Impact Fee Study as needed and recommend such impact fees be adopted by the Local Governments after consideration in good faith.

SECTION 4: COORDINATING AND SHARING OF INFORMATION.

- 4.1.** The Local Governments shall provide Future Land Use Map (FLUM) amendments applications that increase residential density to the School Board within 10 working days of receipt of such complete FLUM amendments applications pursuant to Sec. 125.022, F.S., and Sec. 166.033 F.S. and, if adopted, within 40 days of adoption. The Local Governments also shall provide to one another and the School Board any updates to the Capital Improvements Element Schedule of Capital Improvements or amendments to the Transportation Element that reduce roadway capacity at least 10 working days prior to the Local Planning Agency public hearing and, if adopted, within 40 days of adoption.
- 4.2.** Tentative Educational Facilities Plan (TEFP). Annually and in conformance with Section 1013.35(2)(a), (b), and (3) F.S., prior to the adoption of the school budget, the School Board shall prepare a TEFP that includes long-range planning for facility needs over 5-year, 10-year, and 20-year periods. The School Board shall

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submit the TEFP to, and schedule a public meeting with, the TWG. The TWG shall review the TEFP and comment to the School Board on:

- 4.2.1. Consistency of the TEFP with the applicable Local Government comprehensive plan;
- 4.2.2. Whether a comprehensive plan amendment will be necessary for any proposed educational facility, and
- 4.2.3. Whether the applicable Local Government supports a necessary plan amendment.

If the Local Government does not support the comprehensive plan amendment for a proposed educational facility, the matter shall be resolved pursuant to Section 10 of this Interlocal Agreement.

- 4.3. Adopted Educational Facilities Plan (ADEF). Annually and in conformance with Section 1013.35(4), F.S., the School Board shall consider and adopt the TEFP. Upon giving proper notice to the public and Local Governments and opportunity for public comment, the School Board may amend the TEFP to revise the priority of projects, to add or delete projects, to reflect the impact of change orders, or to reflect the approval of new revenue sources which may become available. The School Board shall make available to the Local Governments the AEFP within 30 calendar days after adoption.
- 4.4. The Local Governments shall provide to the School Board any increases in residential density that exceed the maximum density allowed under the applicable Future Land Use Map (FLUM) designation and which are not required to undergo a FLUM amendment within 10 working days of receipt of a development order or permit application. These density increases include, but are not limited to:
 - 4.4.1. Incentives for graywater technologies under Section 403.892, F.S.;
 - 4.4.2. Ten percent (10%) affordable housing incentive under Section 125.01055(6) and 166.04151(6), F.S.; and
 - 4.4.3. Any affordable housing density bonus exempted under the Local Government's Comprehensive Plan.
- 4.5. By February 1 of each year, Local Governments will provide the School Board with a report on growth and development trends within their jurisdiction. This report will include information on issues that may have an impact on school facilities and student Enrollment such as:
 - 4.5.1. future land use map amendments and rezonings which increase residential densities;
 - 4.5.2. residential Building Permits by number of bedrooms issued during the preceding year and their location; and
 - 4.5.3. approved subdivision plats and multi-family residential site plans.

**MARION COUNTY THIRD AMENDED AND RESTATED
INTERLOCAL AGREEMENT FOR PUBLIC SCHOOL
FACILITY PLANNING**

- 4.6. No later than November 1 of each year, the School Board shall make available on its website, and provide to the other Parties, the adopted Educational Facilities Plan.
- 4.7. The Parties shall work together to develop and maintain a mechanism for tracking students generated by existing, approved and vested development and to forecast future student demand from long-term growth through the Comprehensive Plan horizon. The Parties shall consider coordinating the Comprehensive Plan and the Adopted Educational Facilities Plan horizons with the Marion County Transportation Planning Organization's Long-Range Transportation Plan horizon.

SECTION 5: SITE SELECTION, SCHOOL CLOSURES AND REDISTRICTING.

- 5.1. When the need for a new school is identified in the district educational facilities plan or by the PSPO, the School Board staff will develop a list of potential sites in the area of need and submit that list to the PSAC. The list of potential sites for new schools and the list of schools identified in the district educational facilities plan for significant renovation and potential closure also will be submitted to the Local Government with jurisdiction for an informal assessment regarding consistency with the Local Government Comprehensive Plan, including, as applicable: environmental suitability, transportation and pedestrian access, availability of infrastructure and services, safety concerns, land use compatibility and other relevant issues, based on the best available data. In addition, the issues identified in Subsection 5.2 of this Agreement will be considered by both the Local Government and PSAC as each site or school is evaluated. Based on the information gathered during this review, for new schools, the PSAC will issue comments to the Superintendent about the merits of the sites. For significant renovations and potential closures, the PSAC will make appropriate recommendations.
- 5.2. An analysis of the following will be presented by the School District Staff and will be considered by the PSAC, the School Board, and the Local Governments when evaluating new school sites and significant renovations and potential closure of existing schools:
 - 5.2.1. The location of schools proximate to urban Residential Development and contiguous to existing school sites, 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;
 - 5.2.2. The location of Elementary Schools proximate to and within walking distance of the residential neighborhoods served;
 - 5.2.3. **The location of Middle Schools proximate to and within bicycling distance of the residential neighborhoods served;**
 - 5.2.4. The location of High Schools on the periphery of residential

**MARION COUNTY THIRD AMENDED AND RESTATED
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- neighborhoods, with access to major roads;
- 5.2.5.** Compatibility of the school site with present and projected uses of adjacent property;
 - 5.2.6.** 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;
 - 5.2.7.** Site acquisition and development costs;
 - 5.2.8.** Safe access to and from the school site by pedestrians and vehicles;
 - 5.2.9.** Existing, planned availability of, or cost to provide, adequate public facilities and services to support the school including water and sewer service, and transportation facilities;
 - 5.2.10.** Environmental constraints that would either preclude or render cost infeasible for the development or significant renovation of a public school on the site;
 - 5.2.11.** 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;
 - 5.2.12.** The site is well drained and the soils are suitable for development or are adaptable for development and outdoor educational purposes with drainage improvements;
 - 5.2.13.** The proposed location is not in conflict with the Local Government Comprehensive Plan, storm water management plans, or watershed management plans;
 - 5.2.14.** The proposed location is not within a velocity flood zone or floodway, as delineated in the applicable Comprehensive Plan;
 - 5.2.15.** The proposed site can accommodate the required parking, circulation and queuing of vehicles; and
 - 5.2.16.** 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.
- 5.3.** At least 60 days prior to acquiring or leasing property that may be used for a new public Educational Facility, the School Board 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 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 Sections 1013.33(9) and (10), F.S.
- 5.4.** In the event it is determined, by the Local Government with jurisdiction over the use of the land, that a new school site, significant renovations or the potential closure of an existing school site would be inconsistent with the local Comprehensive Plan, the School Board may make application to amend the future land use map or propose appropriate text amendments to address the

**MARION COUNTY THIRD AMENDED AND RESTATED
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inconsistency. If such application is made by the School Board, the Local Government with jurisdiction over the use of the land shall waive application fees, and shall process such application(s) for land use and/or text amendments, and associated rezoning or special use permits, in an expedited manner in the Local Government's next applicable application cycle.

SECTION 6: LOCAL PLANNING AGENCIES (LPA), COMPREHENSIVE PLAN AMENDMENTS, REZONING\$ AND DEVELOPMENT APPROVALS

- 6.1. The Local Governments will include an advisory representative appointed by the School Board on the local planning agencies or equivalent agencies, to attend and provide comments at those meetings at which the agencies consider Comprehensive Plan Amendments, rezonings, and Development Approvals that would, if approved, increase residential density on the property that is the subject of the application. The Local Governments may, at their discretion, grant voting status to the School Board member.
- 6.2. Pursuant to Section 1013.33(7), F.S., local governments may impose reasonable development standards and conditions in accordance with Section 1013.51(1), F.S., and may consider the site plan and its adequacy as it relates to environmental concerns, health, safety and welfare, and effects on adjacent property. Standards and conditions may not be imposed which conflict with those established in Chapter 1013, F.S., or the Florida Building Code, unless mutually agreed and consistent with the interlocal agreement required by Section 163.31777, F.S.

SECTION 7: CO-LOCATION AND SHARED USE.

- 7.1. Co-location and shared use of facilities are important to both the School Board and Local Governments. The School Board and Local Governments will work together, via the TWG, to look for opportunities to co-locate or share use of school facilities and civic facilities when preparing the District Facilities Work Program. Likewise, co-location and shared use opportunities will be considered by the Local Governments when preparing the annual update to the Comprehensive Plan's schedule of capital improvements and when planning and designing new, or renovating existing, community facilities. For example, potential opportunities for co-location and shared use with public schools will be considered where compatible for existing or planned libraries, parks, recreation facilities, community centers, auditoriums, learning centers, museums, performing arts centers, and stadiums. In addition, the potential for co-location or shared use of school and governmental facilities for joint use by the community will also be considered.
- 7.2. A separate agreement or an amendment to a master agreement between the School Board and the appropriate Local Government will be developed for each instance of co-location or shared use, which addresses legal liability, operating and maintenance

**MARION COUNTY THIRD AMENDED AND RESTATED
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costs, scheduling of use, and facility supervision or any other issues that may arise from co-location or shared use.

- 7.3. All co-location projects shall comply with Section 1012.465, Florida Statutes, concerning background screening requirements for certain non-instructional school district employees and contractors (to satisfy the Jessica Lunsford Act constraints).

SECTION 8: SUPPORTING INFRASTRUCTURE.

- 8.1. 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 each new school or the proposed significant expansion of an existing school, in those instances where School Capacity is being added to accommodate new student populations.
- 8.1.1. Significant expansion shall include construction improvements that result in a greater than five (5) percent increase in Student Capacity, the location of relocatables, or additions to existing buildings for High Schools with a School Capacity of more than 2,000 students.
- 8.1.2. For significant expansions to High Schools with a School Capacity of less than 2,000 and for Middle Schools, the applicable percentage shall be ten (10) percent, and for significant expansions to Elementary Schools (including K-8 centers), the applicable percentage shall be fifteen (15) percent.

The School Board and affected Local Government will enter into a letter of agreement as to the timing, location, and the Party or Parties responsible for constructing, operating and maintaining the required on-site and off-site improvements related to the expansions and new schools referenced above, respectively.

- 8.2. This section shall not be construed to require the affected local unit of government to bear any costs of infrastructure improvements related to school improvements.
- 8.3. In the construction of educational facilities and infrastructure, standards and conditions may not be imposed which conflict with the Florida Building Code (FBC). The School Board, pursuant to Section 1013.64(5)(a), F.S., is exempt from local government landscape ordinances, but must comply with FBC landscape requirements for educational facilities. The foregoing statute affords the School Board the option of complying with local government landscaping ordinances if it would be less costly than complying with the FBC.

SECTION 9: AMENDMENT PROCEDURES.

- 9.1. The procedure set forth in Subsection 9.3 of this Agreement shall apply in the event that a Party desires to Amend this Agreement.
- 9.2. The procedure set forth herein shall apply when adopting or amending the Adopted

**MARION COUNTY THIRD AMENDED AND RESTATED
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Educational Facilities Plan described in Section 4.3 of this Agreement, other than the annual or semi-annual update, to the extent that the adoption or amendment affects School Capacity under this Agreement; provided, however, in the event of a catastrophic event, the School Board may amend the Adopted Educational Facilities Plan on its own to the extent necessary to adequately address the conditions caused by such event. This Subsection shall not subject the School Board to amendment procedures for Work Program scheduling, changes to maintenance, repair, renovation and capital outlay projects that do not add School Capacity.

- 9.3.** The procedures for amending this Agreement are as follows:
- 9.3.1.** The Party wishing to adopt or amend (collectively, an "amendment") one of the above-listed items shall be the "Initiating Party". The Initiating Party may be a Local Government or the School Board.
 - 9.3.2.** The Party reviewing and commenting on a proposed amendment shall be the "Reviewing Parties".
 - 9.3.3.** Before officially considering an amendment to one of the sections or subsections herein, the Initiating Party shall transmit to the Reviewing Parties a memorandum outlining the proposed amendment, and a statement regarding the impact of the proposed amendment on the Local Governments' Comprehensive Plans addressed by this Agreement. The memorandum also must include all data and analysis supporting the proposed amendment.
 - 9.3.4.** Within sixty (60) days of its receipt of a proposed amendment from the Initiating Party, the Reviewing Parties shall provide any written comments or objections to all other Parties to this Agreement. The Reviewing Parties shall indicate whether it consents to the proposed amendment or, if it does not, the reasons for withholding its consent. Representatives of the Parties may meet prior to the Reviewing Parties' submission of written comments in order to attempt to resolve any objections to the proposed amendment.
 - 9.3.5.** If the Reviewing Party is unable to consent to the proposed amendment, the matter will be resolved pursuant to the dispute resolution process set forth in Section 10 of this Agreement.
 - 9.3.6.** The Parties agree that no proposed amendment will be implemented without the consent of the Reviewing Parties or, where the consent of all Reviewing Parties is not obtained, that no proposed amendment will be implemented unless it is determined to be appropriate through the dispute resolution process set forth in Section 10 of this Agreement.
 - 9.3.7.** The Parties agree that, once a proposed amendment has the consent of each of the Reviewing Parties, or is determined to be appropriate through dispute resolution, each Party will undertake Adopted Educational Facilities Plan, Comprehensive Plan, and regulatory changes necessary to effectuate the amendment.

**MARION COUNTY THIRD AMENDED AND RESTATED
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SECTION 10: RESOLUTION OF DISPUTES.

10.1. If the Parties to this Interlocal Agreement are unable to resolve any issue in which they may disagree covered in this Interlocal Agreement, the applicable Parties to the dispute will employ dispute resolution procedures pursuant to Chapter 164 or Chapter 186, F.S., as amended from time to time, or any other mutually acceptable means of alternative dispute resolution. Each party shall bear their own attorney's fees and costs.

SECTION 11: OVERSIGHT PROCESS.

11.1. The PSAC as described in Subsection 2.3 shall be responsible for preparing and transmitting to the School Board an annual report. The report will be made available to the public and presented at a meeting with the date and time to be designated by the Superintendent.

SECTION 12: TERMINATION OF AGREEMENT.

12.1. Any Party to this Agreement may terminate its participation in this Agreement by providing a sixty (60) day written notice to all other Parties and to the Florida Department of Economic Opportunity, Community Planning, Development and Services.

12.2. If the Florida Statutes as they pertain to school planning coordination or an Interlocal Agreement are repealed, this Agreement may be terminated, in part or in full, by written consent of all Parties of this Agreement.

SECTION 13: MISCELLANEOUS.

13.1. Any reference herein to a Party or other person or entity will also be deemed to refer to the designee of such Party, person or entity.

SECTION 14: SEVERABILITY.

14.1. It is declared to be the intent of The Parties that if any section, subsection, sentence, clause, phrase or portion of this Interlocal Agreement is for any reason held or declared to be unconstitutional, inoperative or void, such holding or invalidity shall not affect the remaining portions of this Interlocal Agreement, and it shall be construed to have been the legislative intent to pass this Interlocal Agreement without such unconstitutional, invalid or inoperative part therein, and the remainder of this Interlocal Agreement after the exclusion of such part or parts shall be deemed and held to be valid as if such part or parts had not been included herein. If this Interlocal Agreement or any provision thereof shall be held inapplicable to any person, group of persons, property or kind of property, or

**MARION COUNTY THIRD AMENDED AND RESTATED
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circumstances or set of circumstances, such holding shall not affect the applicability hereof to any other person, property or circumstance.

SECTION 15: NOTICE.

15.1. All notices which may be given pursuant to this Interlocal Agreement, except notices for meetings provided for elsewhere herein, must be in writing and addressed to the Parties indicated below or as the same may be changed in writing from time to time.

15.1. Marion County
Marion County Administrator
601 SE 25th Avenue
Ocala, Florida 34471

15.2. Marion County School Board
Superintendent of Schools
1614 E. Fort King Street
Ocala, Florida 34471

15.3. City of Belleview
City Administrator
5343 SE Abshier Boulevard
Belleview, Florida 34420

15.4. City of Dunnellon
City Clerk
20750 River Drive
Dunnellon, Florida 34431

15.5. City of Ocala
City Manager
110 SE Watula Avenue
Ocala, Florida 34471

15.6. Town of McIntosh
Town Clerk
Post Office Box 165
McIntosh, Florida 32664

15.7. Town of Reddick
Town Clerk
Post Office Box 99
Reddick, Florida 32686


**MARION COUNTY THIRD AMENDED AND RESTATED
INTERLOCAL AGREEMENT FOR PUBLIC SCHOOL
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SECTION 16: EFFECTIVE DATE.

16.1. The effective date of this Agreement shall be February 7, 2023.

IN WITNESS WHEREOF, this Interlocal Agreement has been executed by the Board of County Commissioners of Marion County, Florida this 7th day of February, 2023.

ATTEST:



Gregory C. Harrell,
Clerk of Court

BOARD OF COUNTY COMMISSIONERS,
MARION COUNTY, FLORIDA



Craig Curry, Chairman

Approved as to Form
and Legal Sufficiency



Marion County Attorney

MARION COUNTY THIRD AMENDED AND RESTATED
INTERLOCAL AGREEMENT FOR PUBLIC SCHOOL
FACILITY PLANNING

SECTION 16: EFFECTIVE DATE.

The effective date of this Agreement shall be February 21, 2023.

IN WITNESS WHEREOF, this Interlocal Agreement has been executed by the City Council of Ocala, Florida this 21 day of February, 2023.

ATTEST: Angel B. Jacobs CITY OF OCALA
Angel B. Jacobs By: James P. Hilty Sr.
City Clerk James P. Hilty Sr.
President, Ocala City Council

Approved as to form and legality:
By: William E. Sexton
William E. Sexton
City Attorney



ACCEPTED BY CITY COUNCIL
February 22, 2023
DATE


OFFICE OF THE CITY CLERK

MARION COUNTY THIRD AMENDED AND RESTATED
INTERLOCAL AGREEMENT FOR PUBLIC SCHOOL
FACILITY PLANNING

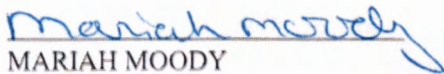
SECTION 16: EFFECTIVE DATE.

16.1. The effective date of this Agreement shall be March 7th, 2023.

IN WITNESS WHEREOF, this Interlocal Agreement has been executed by the
City of Belleview Commissioners, this 7th day of March, 2023.


CHRISTINE K. DOBKOWSKI
Mayor-Commissioner

Attest:


MARIAH MOODY
City Clerk



Approved as to Form and Legal Sufficiency
for the use and Benefit of the City of Belleview Only:

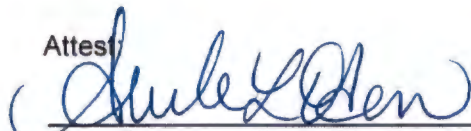

FREDERICK E. LANDT, III
City Attorney


**MARION COUNTY THIRD AMENDED AND RESTATED
INTERLOCAL AGREEMENT FOR PUBLIC SCHOOL
FACILITY PLANNING**

SECTION 16: EFFECTIVE DATE.

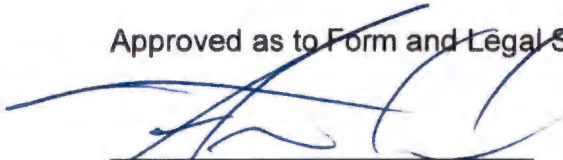
16.1. The effective date of this Agreement shall be March 15, 2023.

IN WITNESS WHEREOF, this Interlocal Agreement has been executed by the City of Dunnellon, City Council this 15th day of March, 2023.

Attest:

Amanda Odom, CMC, City Clerk

City of Dunnellon, Florida

Wallace Dunn, II, Vice-Mayor

Approved as to Form and Legal Sufficiency:


City of Dunnellon Attorney

**MARION COUNTY THIRD AMENDED AND RESTATED
INTERLOCAL AGREEMENT FOR PUBLIC SCHOOL
FACILITY PLANNING**

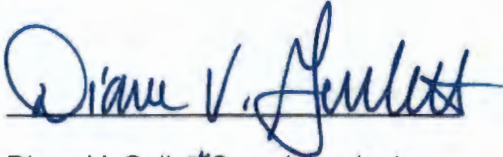
SECTION 16: EFFECTIVE DATE.

16.1 . The effective date of this Agreement shall be _____, 2023.

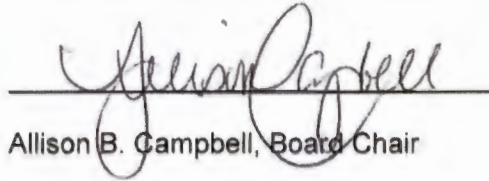
IN WITNESS WHEREOF, this Interlocal Agreement has been executed by The School Board of Marion County, Florida this _____ day of _____, 2023.

ATTEST:

THE SCHOOL BOARD OF MARION COUNTY,
FLORIDA

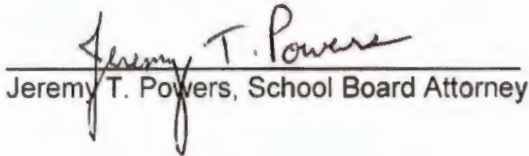


Diane V. Gullett, Superintendent



Allison B. Campbell, Board Chair

Approved as to Form
and Legal Sufficiency



Jeremy T. Powers, School Board Attorney

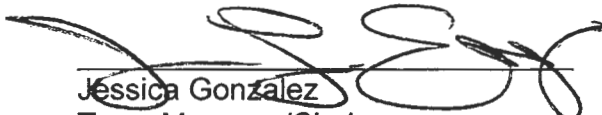
**MARION COUNTY THIRD AMENDED AND RESTATED
INTERLOCAL AGREEMENT FOR PUBLIC SCHOOL
FACILITY PLANNING**

SECTION 16: EFFECTIVE DATE.

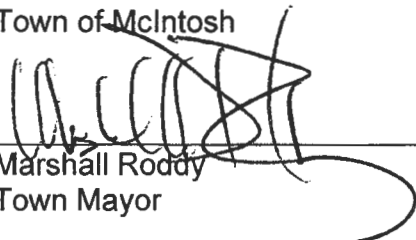
16.1. The effective date of this Agreement shall be February 7, 2023.

IN WITNESS WHEREOF, this Interlocal Agreement has been executed by the Town of McIntosh of Marion County, Florida this 13th day of April, 2023.

ATTEST:




Jessica Gonzalez
Town Manager/Clerk

Town of McIntosh


Marshall Roddy
Town Mayor

Approved as to Form a Legal Sufficiency



Stacie Corbett
McIntosh Town Attorney



Public Schools Planning Officials (PSPO) Joint Planning Workshop

McPherson Governmental Campus
601 SE 25th Avenue
Ocala, Florida 34471
Phone: 352-438-2622

EXHIBIT A

JOINT PLANNING WORKSHOP (JPW) AGENDA MONTH DAY, YEAR MEETING AT TIME LOCATION

1. ROLL CALL
2. REVIEW OF JPW MINUTES FROM PREVIOUS YEAR
3. REVIEW TECHNICAL WORKING GROUP REPORT
4. MAKE RECOMMENDATIONS
5. SCHEDULE NEXT MEETING
6. ADJOURN

EXHIBIT B

INTERLOCAL AGREEMENT (ILA) PUBLIC SCHOOL FACILITY PLANNING TECHNICAL WORKING GROUP AGENDA MONTH DAY, YEAR MEETING AT TIME LOCATION

1. ROLL CALL
2. REVIEW OF MINUTES
3. DISCUSSION ITEM 1
4. DISCUSSION ITEM 2
5. SCHEDULE NEXT MEETING
6. ADJOURN

Dr. Diane Gullett
Superintendent

Allison Campbell
District 1

Lori Conrad
District 2

Eric Cummings
District 3

Nancy Thrower
District 4

Dr. Sarah James
District 5





Marion County

Board of County Commissioners Workshop

Agenda Item

File No.: 2025-18382

Agenda Date: 3/12/2025

Agenda No.: 4.

SUBJECT:

“Tentative Education Facilities Plan Update” Project Update, Vice Chair Stephen Ayres, Technical Working Group, Director of Student Assignment and Records, Marion County Public Schools

RECOMMENDED ACTION:

See Attached.

Tentative Education Facilities Plan

PROJECT UPDATE

March 2025 PSPO Meeting

The Technical Working Group

in partnership with



AGENDA

Project Status



01

Looking Forward



02

Confirmation & Discussion



03

Project Status



Project Status

PURPOSE



SCHOOL COLLABORATION WITH LOCAL GOVERNMENTS

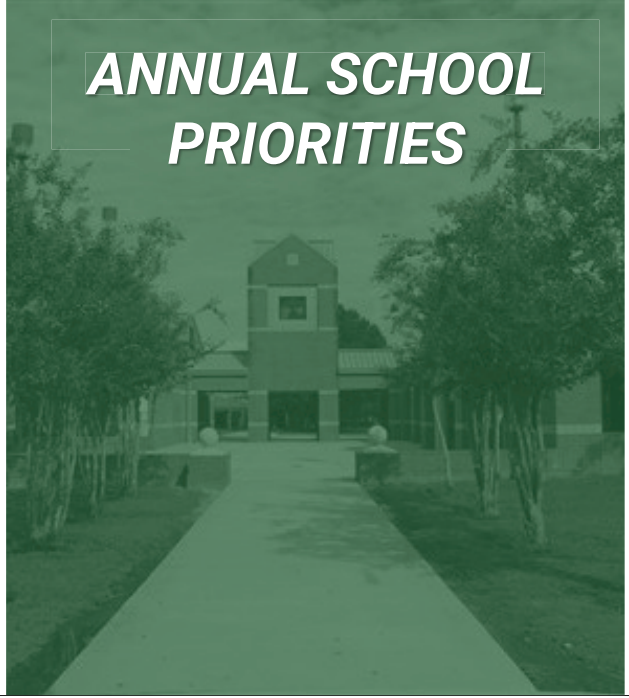
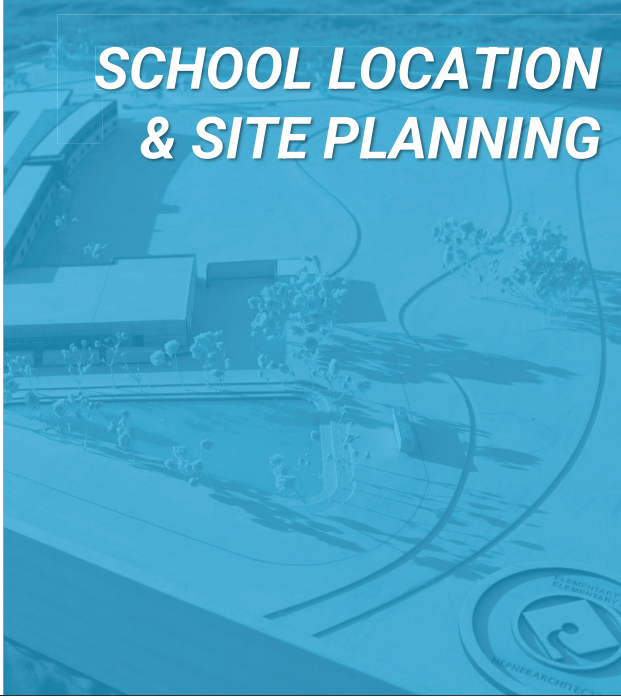
DATA-BASED SCHOOL CAPACITY & GROWTH





Project Status

GOALS



Project Status

PARTICIPANTS

JURISDICTIONS



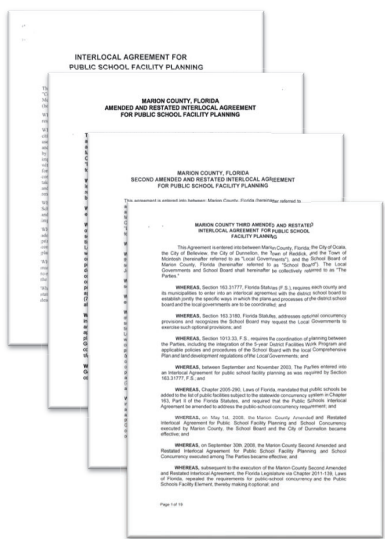
COMMITTEES

- Public School Planning Officials
- Technical Working Group
- Technical Working Group Subcommittee
- Public School Advisory Council



Project Status

TOOLS



A

interlocal agreements

B

data

C

communication



Project Status

MEETINGS

TWG COMMITTEE

PSPO

Sep. 13 Nov. 8 Jan. 24

Mar. 12



TWG SUBCOMMITTEE

Nov. 6 Nov. 15 Dec. 5 Jan. 9 Jan. 16 Jan. 22 Feb. 12 Feb. 20 Feb. 25 Mar. 6



Project Status

ITEMS TO RESOLVE

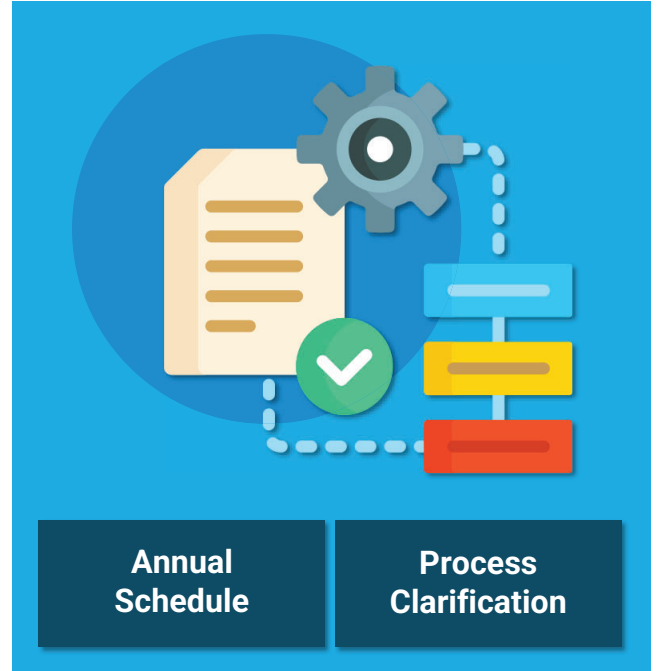
DATA



Standardization of Development Data

Impacts to School System

ILA



Annual Schedule

Process Clarification

SECTION 02


Looking Forward



Looking Forward

DATA






Looking Forward (Data)

WORK PLAN








12

DATA



Standardization of
Development Data

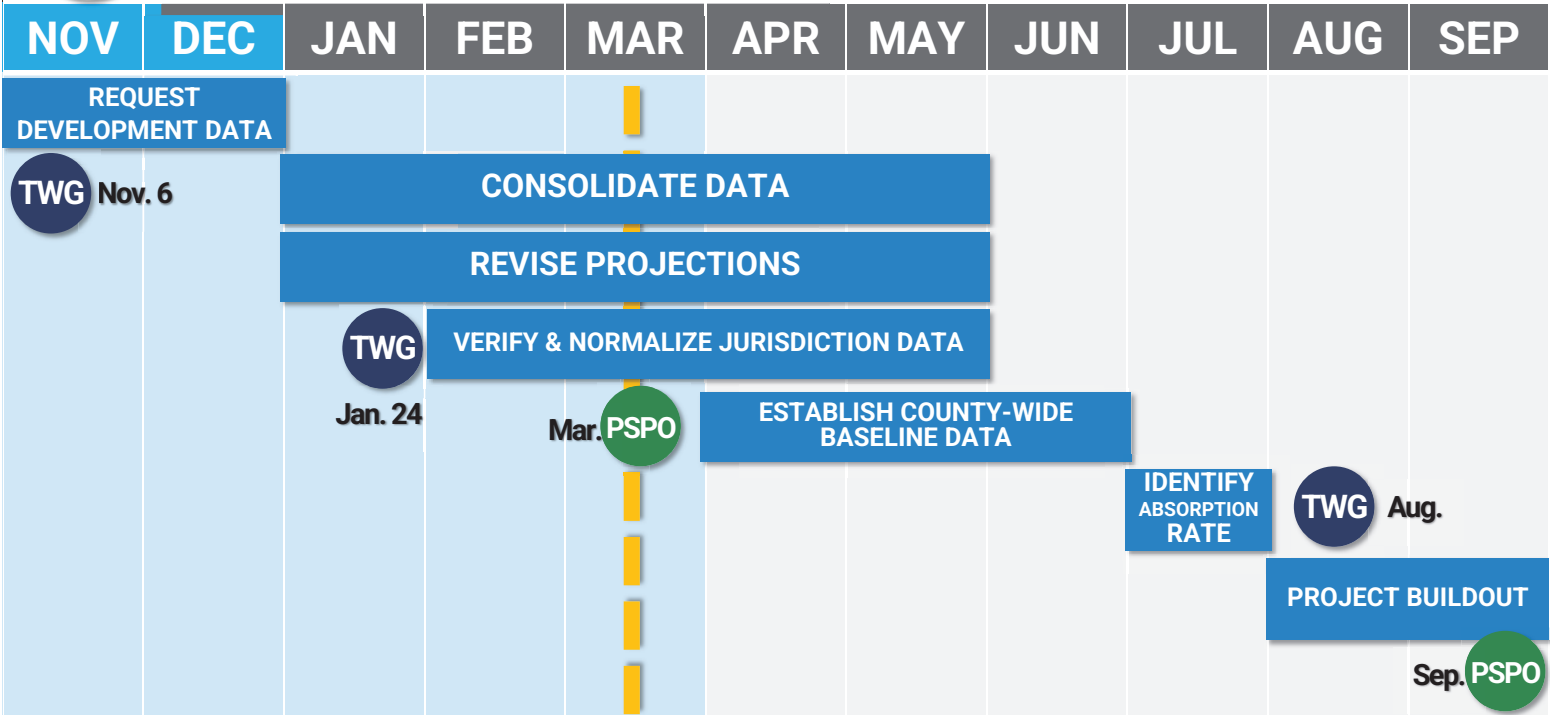
Impacts to
School System

- 
 1. Request Development & School Data
(Oct. - Dec.)
- 
 2. Consolidate Development Data
(Jan. - May)
- 
 3. Data Refinement
(Jan. - May)
- 
 4. Verify & Normalize Jurisdiction Data
(Feb. - May)
- 
 5. Establish County-wide Baseline Data
(Apr. - June)
- 
 6. Identify Absorption Rate
(July)
- 
 7. Project 5-, 10-, 20-Yr. Buildout
(Aug. - Sept.)



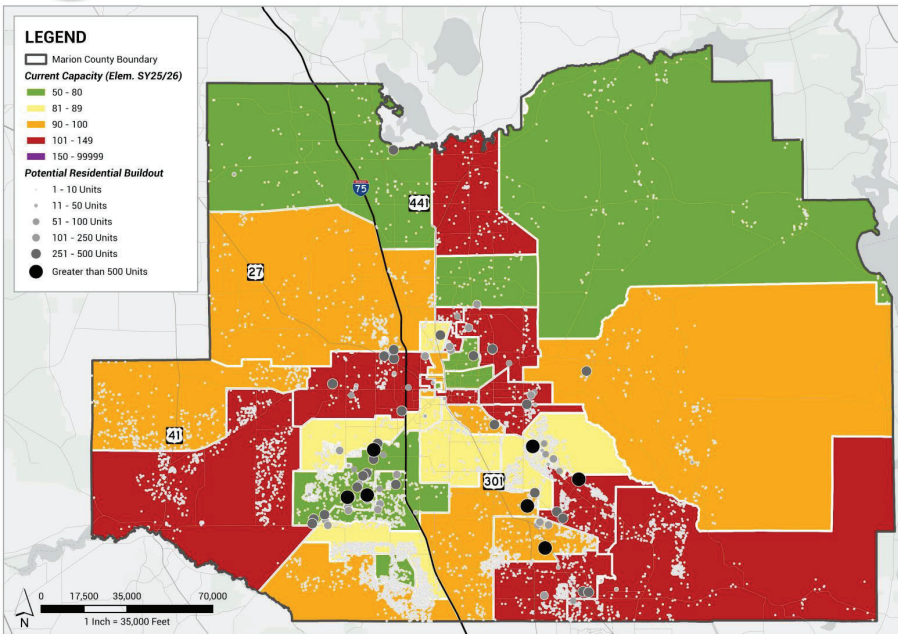
Looking Forward (Data)

WORK PLAN



Looking Forward (Data)

SY 24-25 CAPACITY & ENROLLMENT



elementary

Enrollment

20,577

Capacity

90%

Current Elementary School Capacity (SY 25/26 Zones)





Looking Forward (Data)

SY 24-25 CAPACITY & ENROLLMENT

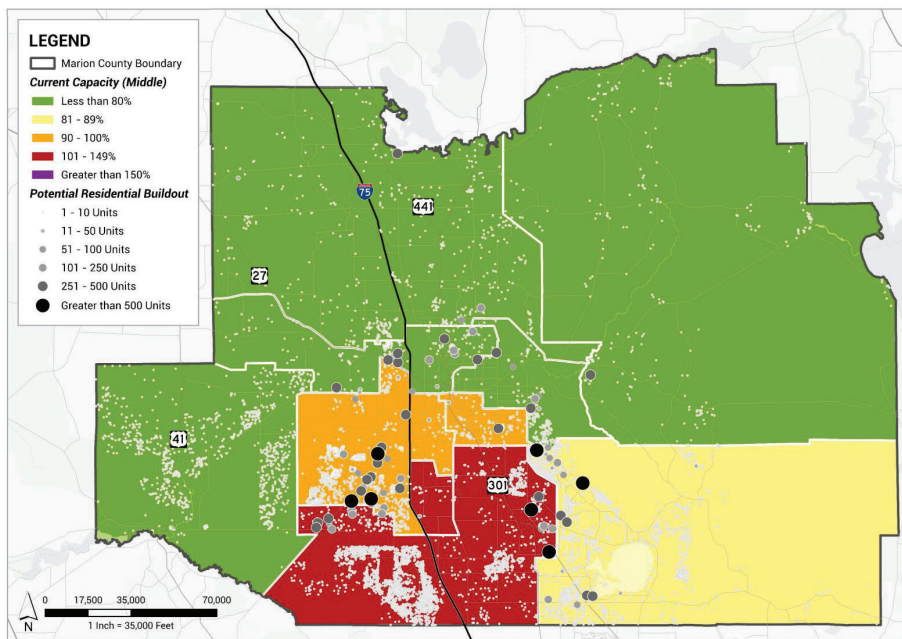
middle

Enrollment

10,452

Capacity

91%



Current Middle School Capacity



Looking Forward (Data)

SY 24-25 CAPACITY & ENROLLMENT

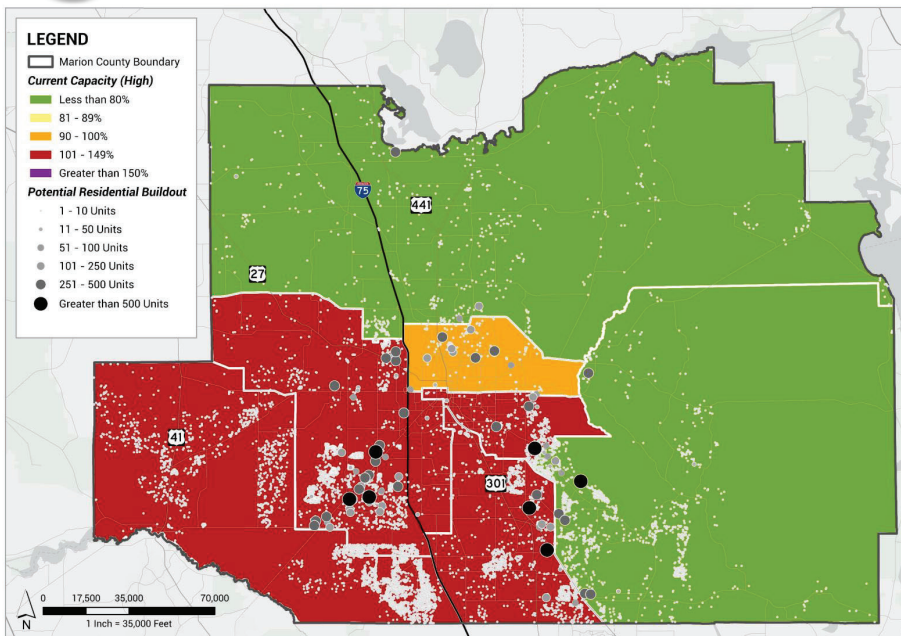
high

Enrollment

13,249

Capacity

101%



Current High School Capacity



Looking Forward

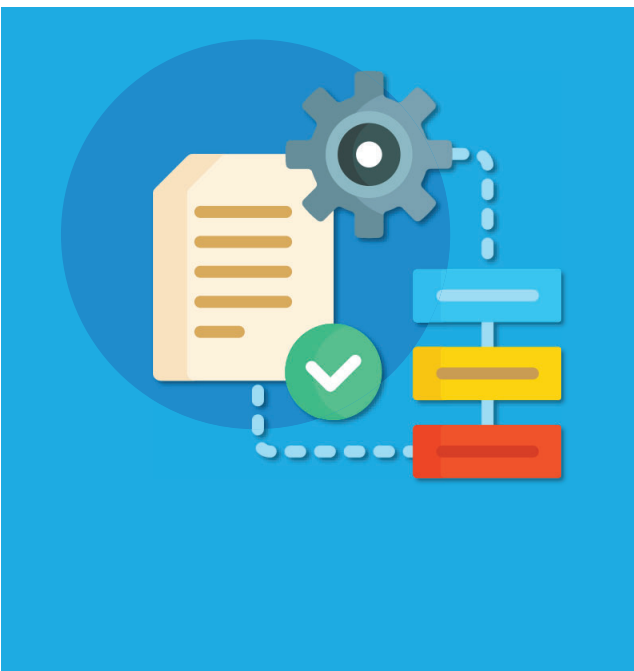
ILA










Looking Forward (ILA)

WORK PLAN

ILA



- 
1. Define Issues
(Dec. - Jan.)
- 
2. Identify Improvements
(Jan.)
- 
3. TWG Direction
(Jan. - Feb.)
- 
4. Draft Amendments
(Feb. - Jul.)
- 
5. Jurisdiction Review
(Mar. - Jul.)
- 
6. Revise Amendments
(Mar. - Aug.)
- 
7. Revise & Adopt Improved Agreement
(Sep. PSPO)

Indicates step concludes with a TWG Meeting

TWG

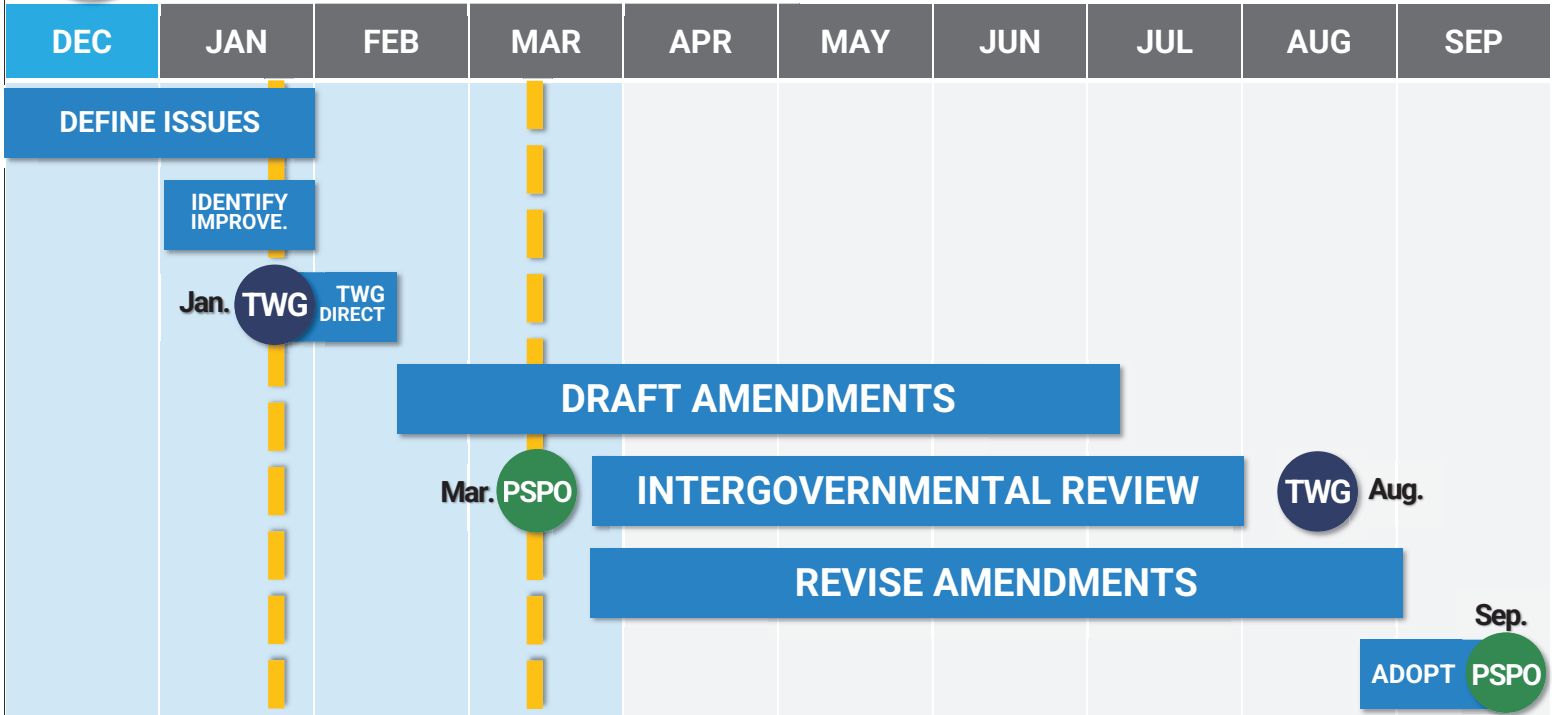
TWG

TWG



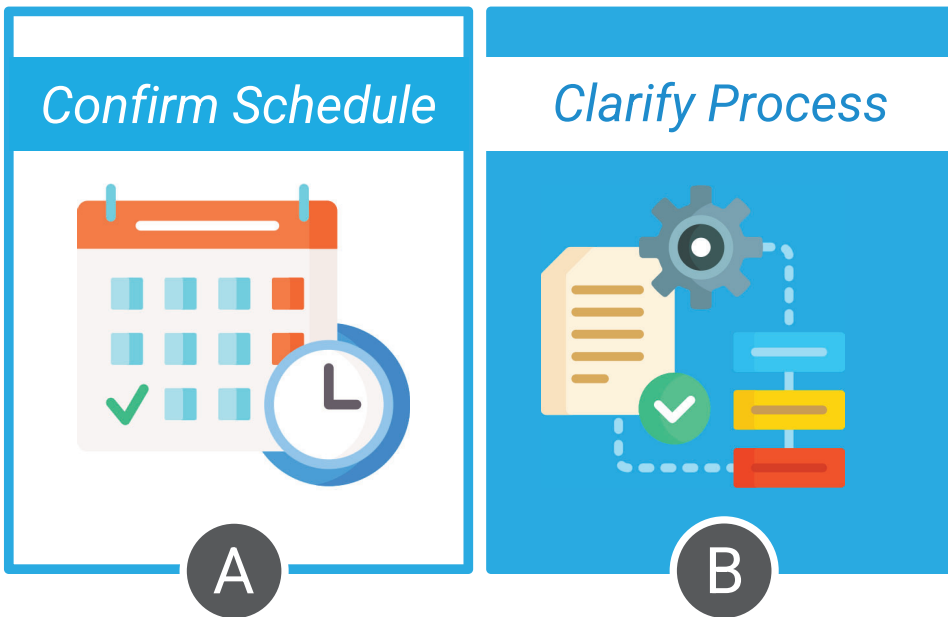
Looking Forward (ILA)

WORK PLAN



Looking Forward (ILA)

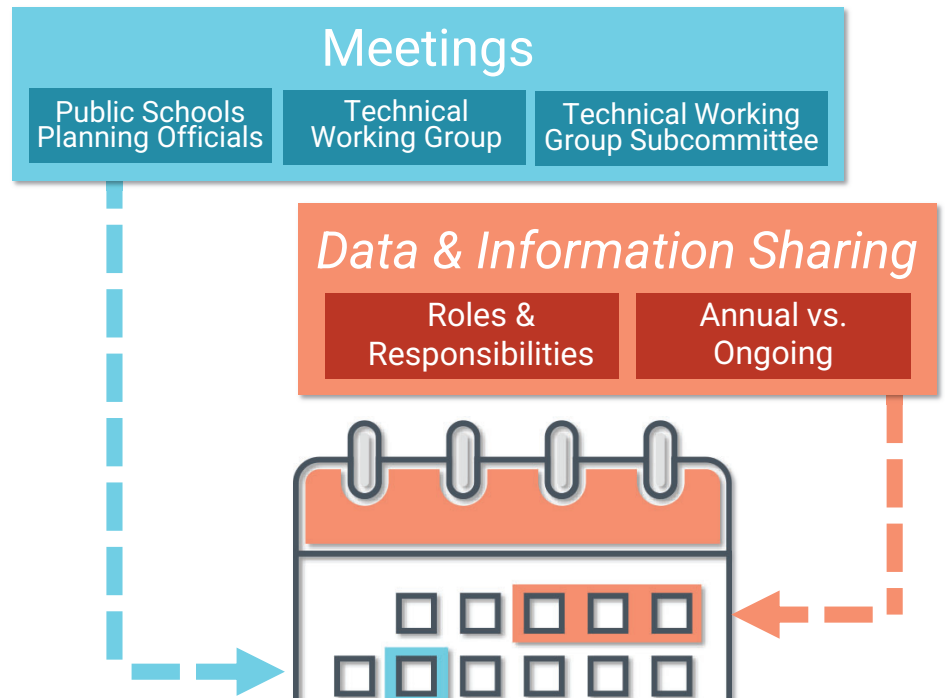
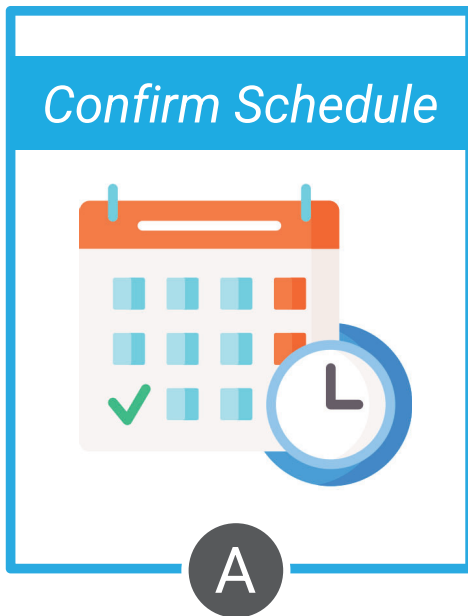
ITEMS TO ADDRESS





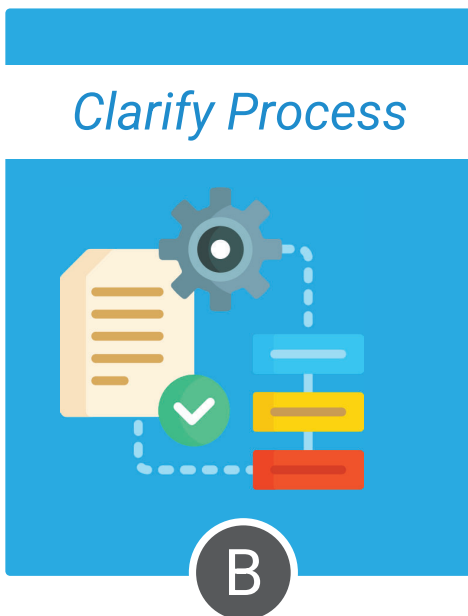
Looking Forward (ILA)

ITEMS TO ADDRESS



Looking Forward (ILA)

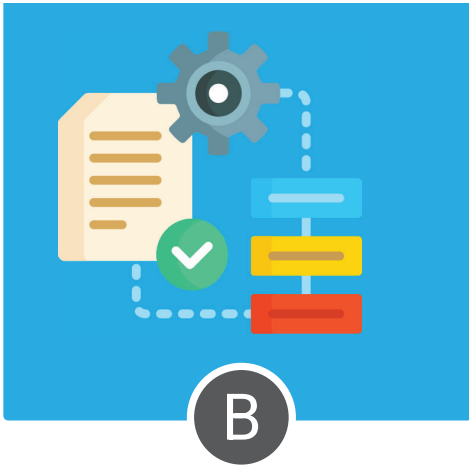
ITEMS TO ADDRESS



- I. **Table of Contents**
- II. **Roles and Responsibilities**
- III. **Procedure**
 - A. Joint Meetings
 - B. Information Sharing Coordination
 - a. Formatting of Data Shared
 - b. Uniformity of Data Tracked
 - C. Student Enrollment & Population Projections
 - D. School Location & Site Selection



Clarify Process



IV. Appendix

- A. Annual Schedule
- B. Student Generation Multiplier
- C. Sample Agendas
- D. Glossary

SECTION 03

CONFIRMATION & DISCUSSION





CONFIRMATION & DISCUSSION

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The **TWG Subcommittee** is asking the **PSPO** for guidance on these topics:

- Schedules Based on “School Year”
- Work Plan for Data Assessment
- Work Plan for ILA Amendments
- Focus for ILA Amendments
- Consideration for Further TWG Review & Meetings (Aug.)
- PSPO “JPW” Date (Sept.)

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THANK YOU

Tentative Education Facilities Plan

PROJECT UPDATE

March 2025 PSPO Meeting

*The Technical
Working Group*

in partnership with



MCPS
MARION COUNTY PUBLIC SCHOOLS
"Helping Every Student Succeed"