



Marion County

Board of County Commissioners

Workshop

Meeting Agenda

Wednesday, April 1, 2026

9:00 AM

Southeastern Livestock Pavilion

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

INTRODUCTION OF WORKSHOP BY CHAIRMAN CARL ZALAK III

INVOCATION

PLEDGE OF ALLEGIANCE BY MARION COUNTY PUBLIC SCHOOLS

ROLL CALL

MINUTES

[Minutes from the March 12, 2025 Joint Planning Workshop](#)

WORKSHOP PRESENTATION

1. [Overview, Tracy Straub, Technical Working Group Chair, Assistant County Administrator, Marion County Board of County Commissioners](#)
2. [Marion County Public Schools Update, Dr. Danielle Brewer, Ed.D., Superintendent of Schools, Marion County Public Schools](#)
3. ["Tentative Education Facilities Plan" Update, Including the Interlocal Agreement, Vice Chair Stephen Ayres, Technical Working Group, Director of Student Assignment and Records, Marion County Public Schools](#)

BOARD DISCUSSION AND CLOSING COMMENTS



Marion County

Board of County Commissioners Workshop

Agenda Item

File No.: 2026-22420

Agenda Date: 4/1/2026

Agenda No.:

SUBJECT:

Minutes from the March 12, 2025 Joint Planning Workshop

DESCRIPTION/BACKGROUND:

For information purposes only; no action required. These Minutes were previously presented and adopted by the Board of County Commissioners during their regular meeting on July 15, 2025.

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

March 12, 2025

CALL TO ORDER:

The Marion County Board of County Commissioners (BCC) met in a workshop session at 9:15 a.m. on Wednesday, March 12, 2025 at the Southeastern Livestock Pavilion (SELP) located at 2232 NE Jacksonville Road in Ocala, Florida.

INTRODUCTION OF WORKSHOP BY CHAIRMAN LORI CONRAD

Chairman Conrad advised that the joint workshop is scheduled this morning between Marion County Public Schools, Municipalities and Marion County Board of County Commissioners.

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

The meeting opened with invocation by Reverend Eric Cummings and the Pledge of Allegiance to the Flag of our Country.

ROLL CALL

Upon roll call the following members were present: Chairman Kathy Bryant, District 2; Vice-Chairman Commissioner Carl Zalak, III, District 4; Commissioner Craig Curry, District 1; Commissioner Matthew McClain, District 3; and Commissioner Michelle Stone, District 5. 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 Lori Conrad, District 2; Vice-Chairman Eric Cummings, District 3; Board Member Allison Campbell, District 1; Board Member Nancy Thrower, District 4; and Board Member Sarah James, District 5. Also present were Superintendent of Marion County Public Schools Dr. Diane Gullett and School Board Attorney Jeremy Powers.

Also present were Commissioner Robert Smith, Seat 4, City of Belleview; Mayor Walter Green, City of Dunnellon; Councilmember Valerie Hanchar, Seat 5, City of Dunnellon; Mayor Ben Marciano, City of Ocala; Council President Kristen Dreyer, District 4, City of Ocala; Councilmember Barry Mansfield, District 1, City of Ocala; and Councilmember James Hilty, District 5, City of Ocala. It was noted that there was no representation from the Town of McIntosh or the Town of Reddick.

The Deputy Clerk was in receipt of a 60 page Agenda packet to follow along with the PowerPoint presentations.

MINUTES

1. March 27, 2024 - Minutes from the Joint Planning Workshop Agenda
MCSB Chairman Lori Conrad advised that the Minutes from the March 27, 2024 Joint Planning Workshop were previously approved by the Marion County Board of County Commissioners. She questioned whether anyone in attendance has questions or

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concerns to bring forward relating to the Minutes. It was noted for the record that there were no questions or concerns raised.

WORKSHOP PRESENTATION

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

Chairman Conrad welcomed everyone to the Joint Workshop. She expressed appreciation for the opportunity to gather in collaboration. Chairman Conrad stated the MCSB, and the BCC continue to come together in the spirit of cooperation to address community issues that ensure Marion County Public Schools (MCPS) are adequate and meet the need of the growing student population. She advised that the path forward may involve differing perspectives; however, this task requires remaining focused on the shared goal, the success of Marion County, its students and its citizens.

Chairman Bryant expressed appreciation to the MCSB members, the Superintendent, and the other municipalities that are present today. She stated taking care of the County's students is an upmost concern. Chairman Bryant noted that Commissioner Stone is the BCC member that has been a part of the Technical Working Group (TWG) and turned the floor over to her for comments.

Commissioner Stone expressed appreciation for the opportunity to continue to work together. She stated it is great to have an Interlocal Agreement (ILA). Commissioner Stone stated the Boards and municipalities last met in March, 2024, and the ILA was signed in March, 2023, which speaks volumes of the commitment from everyone in the room to honor what the parties said they would do including getting together and sharing information that would be most pertinent to moving Marion County forward in the most proper way. She advised that the TWG has met 3 times since September of 2024 (September 13 and November 6, 2024, and January 24, 2025). Commissioner Stone stated the TWG Subcommittee that continues to really do so much of the work are the individuals on each Board, noting they have been meeting practically monthly. She opined that the effort has been cooperative, and the parties are consistently working well exchanging the information that needs to be changed.

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

Superintendent of Schools, Dr. Diane Gullett, Ed.D., MCPS, stated she is responsible for hosting the TWG on behalf of MCPS, noting she has seen progress in the way the committee is working together. She commended the members for their hard work. Dr. Gullett commented on the great outcomes the TWG has delivered, which benefits students and the community. She advised that this is likely her last joint workshop, noting she is resigning at the end of the school year.

Chief Financial Officer (CFO) Theresa Boston-Ellis, MCPS, expressed appreciation for the opportunity to collaborate and do what is best for the students of Marion County. She stated School Impact Fee collections were effective July 1, 2024 with distributions occurring on a quarterly basis. Ms. Boston-Ellis advised that so far MCPS has received \$73,219.00 from the City of Ocala; as of February 7, 2025, and from the BCC, MCPS received one installment on October 21, 2024 in the amount of \$502,240.00; and then on January 10, 2025, \$1,795,129.00 for a total of \$2,370,588.00. She stated the Impact Fees will be used to offset the debt incurred in Capital expenditures for the Certificate of Participation in the building of Elementary W and Elementary X, High School CCC, the

Osceola School gym, Liberty Middle School wing, and the new Middle School DD. Ms. Boston-Ellis advised that the Sales Tax estimated collection over 10 years will be \$335,000,000.00, which is an estimate of roughly \$33,500,000.00 annually. She stated MCPS has not received any new collection to date and looks forward to receiving the quarterly installment in a couple weeks. Ms. Boston-Ellis commented on staff presentations to the Board relating to the use of Sales Tax, which is fluid and continues to change daily, noting she spoke to Chairman Conrad on Monday when they looked at the list that was presented in December. She advised that this list has since changed and the funds will be for classroom wings, replacement schools, a new K-8, and enhancements to some of the older schools in terms of windows and doors.

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

Chairman Conrad expressed appreciation towards Tracy Straub for her work and preparation relating to today's meeting.

ACA/TWG Chairman Tracy Straub stated the ILA for Public School Facility Planning was updated and resigned by the all of the agencies in March, 2023, noting from there it has specific items outlined in it that the agencies will continue to do and work on routinely. She advised that Florida Statute (FS), Chapters 163 and 1013 require counties, municipalities and school districts to coordinate and share information regarding community growth and development, which are being adhered to by the parties resulting in semi-annual TWG meetings and this Joint Planning Workshop at least on an annual basis. Ms. Straub stated the reason the parties come together is to ensure everybody is aware of the growth and development that is occurring in Marion County, how it affects the school system, and how the agencies and municipalities are responding to that growth. She commented on the cooperation and coordination that took place relating to the 3 schools that are underway.

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

Director of Student Assignment and Records, MCPS/TWG Vice Chairman Stephen Ayres, advised that the TWG Subcommittee has been meeting regularly. He stated the Subcommittee is working to develop an effective process to accurately present an Educational Facilities Plan. Mr. Ayres advised that the TWG Subcommittee consists of all agencies. He stated they collaboratively developed the presentation The presentation will inform the parties of the progress made and set the stage for continued development of the baseline, consistent, and vetted development data that will establish the foundation for the future educational capacity needs of MCPS.

Director of Planning Kathie Ebaugh, JBPro, NW 43rd Street, Gainesville, provided an overview relating to her qualifications. She stated today she will share the first step towards a stronger baseline of data that will move the County forward and provide the tools needed to properly plan for MCPS and provide an excellent education for students. Ms. Ebaugh advised that she looks forward to feedback and input relating to the process being undertaken. She expressed appreciation for the support her team has received from colleagues across the County.

Project Manager Nick Hill, JBPro, NW 43rd Street, Gainesville, advised of 3 Items on his agenda this morning: project status, looking forward/next steps, and confirmation and

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discussion. He stated the purpose is to collaborate with local governments to perform a database school capacity growth assessment and plan. Mr. Hill commented on the need to understand the capacity needs of the district moving forward and ensuring improvement of school planning processes. He stated through this process; he hopes to understand annual school priorities. Mr. Hill advised that the school district is fortunate to have jurisdictions working with the consultant in a very collaborative manner, noting JBPro is working with each of the jurisdictions in Marion County. He stated JBPro has been working with several committees (Public School Planning Officials (PSPO), TWG, TWG Subcommittee, and the Public School Advisory Council). Mr. Hill advised that none of this is possible without the ILA. He commented on 2 items they hope to resolve through this process that would set the County up for future success: 1.) data (standardization of development data); and 2.) ILA (opportunities to clarify the process of the ILA and further refine the roles and responsibilities of each agency).

Ms. Ebaugh stated the first thing her organization started to work on back in October was collecting data from all the local jurisdictions, noting they began to compile the data into a system to understand how many developable units are in Marion County and how growth associated with those units coming online will impact school capacity. She advised that some jurisdictions were classifying data differently. Ms. Ebaugh stated when looking within data sets, in order to be able to provide and project out how the growth of those development units would come online over the next 5, 10, 15 and 20 years, it was realized that there was not a good understanding of an absorption rate, there were not consistent phasing plans, and the more the data was reviewed with the TWG Subcommittee the more questions they asked. She advised that the more questions they asked, the more it was realized that they understood what they needed to know, but they also understood that they did not know the answers today and would not know the answers for this meeting. Ms. Ebaugh stated the organization pivoted away from sharing the Educational Facility Plan and moved towards establishing, learning and sharing their process to better understand the data, how it reflects the growth of Marion County, and therefore understand how the County's growth would impact the ability for the MCPS to provide for the needs of future students. She provided a timeline relating to the work plan for the data. Ms. Ebaugh commented on the lack of understanding relating to how the layers of data communicate with each other, noting now they are going through the process of verifying this data with each jurisdiction and asking them to confirm that the data they are looking for and at is consistent to ensure the number of platted, buildable lots in Marion County is known. She advised that the request includes existing units and recently approved new developments relating to whether they are single family, multi-family or mobile homes, as well as any phasing plans from developers with estimates of the number of units they project will be built in a given year. Ms. Ebaugh commented on the units in the County, noting there is not a phasing plan in place for and questioned how to ascertain an absorption rate to determine how many units the County can expect will be built on an annual basis. She stated the process that began in January includes consolidation of development data, refining the data, and verifying and normalizing the jurisdiction data. Ms. Ebaugh advised that as they review the individual components with each jurisdiction, the organization will then be able to establish a baseline of data. She stated they will work with Benesch, noting they are experts at understanding absorption rates. Ms. Ebaugh advised that the absorption rate will tell how many units the County can expect to be built in a given year. She stated once that data is available JBPro will be able to project out for the 5, 10, and 20 year periods how much growth and development

will occur in the County. Ms. Ebaugh advised that they will be able to apply that to the student generation rate so they can project the number of students to expect. She commented on the State Legislature, noting there is more choice in the State and County than ever before and understanding how those choices will impact the school district will be reviewed through this process to ensure every student has access to the best education possible. Ms. Ebaugh referred to a slide seen on the overhead screens, which depicts an overview of the work plan in a Gantt chart form. She stated the goal is to bring this back to the BCC, MSCB and municipalities in the September/October time frame with a full report and understanding of how growth and development is impacting Marion County today and in the long-term. Ms. Ebaugh commented on the difficulty associated with this process, noting the detailed, in-depth nature. She advised that the TWG Subcommittee is confident this effort is valuable long-term not just for MCPS but for all jurisdictions, which will allow for better planning relating to infrastructure.

Ms. Ebaugh commented on data relating to the current student enrollment and capacity. She stated the dots on the maps (shown on the overhead screens), are the development data as it is shown today, noting they are getting an understanding of where the majority of growth and development is happening. Ms. Ebaugh advised that in general, the areas with the most growth and development in the County correspond with where there is the least amount of capacity. She stated the red areas on the map depict the areas with less capacity, while those in green have lots of capacity. Ms. Ebaugh commented on the dots on the map, noting the larger the dot, the greater the number of units being built in that area/development. She advised that this year the elementary enrollment is 20,577, which is a district-wide capacity of 90%. Ms. Ebaugh stated in school planning 90% to 95% is full capacity; however, in order to get permission from the State to build a new school, the County has to be over capacity (105% to 110% capacity). She advised that middle school enrollment is 10,452 with an overall capacity of 91%. Ms. Ebaugh stated the high school enrollment this year is 13,249 with a capacity of 101%. She stated when looking at the overall capacities between 90% and 101%, depending on grade and school level, it means there is school capacity as a whole in the district. Ms. Ebaugh addressed the possible need for adjustments at the local level. She commented on the absorption rate data and the ability to determine the 5, 10, and 20 year projections, noting specific recommendations for growth and capacity can be brought forward once the data is provided. Ms. Ebaugh advised that there will be a better understanding relating to how school choice is impacting the County's schools.

Planner Eryn Mertens, JBPro, commented on her review of the ILA, noting some areas that were identified warrant further discussion and clarity for the purposes of educational facility planning. She stated the items were brought to the TWG in January, noting JBPro is present to discuss the ILA and seek direction relating to specific areas of focus. Ms. Mertens advised that the next steps include providing amendments for detailed discussion at the September meeting. She stated JBPro has begun to identify issues and discuss them with the TWG. Ms. Mertens provided a timeline of the work plan relating to the ILA. She commented on items to address including a confirmation of an annual schedule. Ms. Mertens advised that earlier iterations of the document included that and offered clarity relating to who is responsible for what and when. She opined that this iteration of the amendment could use some clarity, noting it is proposed to bring that component back to the agreement. Ms. Mertens stated there are 2 components to the annual schedule; the meetings component (PSPO, TWG, and TWG Subcommittee), as well as a data and information sharing component to the ILA that outlines roles and

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responsibilities and an annual vs. an ongoing conversation between the jurisdictions.

Ms. Mertens commented on a slide that outlines a suggested structure for an amended ILA including: 1) table of contents; 2) roles and responsibilities; and 3) Procedure (A. joint meetings, B. information sharing coordination (a. formatting of data and b. uniformity of data tracked), C. student enrollment and population projections, and D. school location and site selection). She addressed the addition of an appendix containing: A. annual schedule; B. student generation multiplier; C. sample agendas; and D. glossary.

Mr. Hill commented on the range of topics covered, noting the PSPO is requesting feedback relating to opportunities for improvement in the ILA such as the annual schedule, proposed work plans for future adjustments in the development data and the ILA, as well as any items to address as part of this process that would help improve school facility planning within the District. He stated there will be a request to reconvene the TWG in August, prior to the next PSPO meeting in September to provide the TWG an opportunity to review, discuss and help refine the Educational Facilities Report before it is brought back.

Commissioner Stone advised that it would be appropriate to allow the TWG Subcommittee to go back and work to provide clarity to some of the areas that have been identified and bring an amendment back to the TWG to comb through prior to providing it to each individual Board.

Commissioner Zalak stated he is happy to meet again in September; however, he hopes the data will be a whole lot better. He expressed concern relating to the lack of information provided today.

Ms. Conrad opined that is the overall feeling, noting the MCSB thought there would be more data coming forward. She commented on challenges relating to aligning the data.

In response to Ms. Conrad, Growth Management Director Jeff Shrum, City of Ocala, advised that staff had the same concern relating to the release of data that was not uniform. He commented on the desire to establish a good working baseline. Mr. Shrum expressed appreciation for the time the TWG Subcommittee put in, noting they plan to put in as much time as needed to get to the point of having good data for the next meeting. He stated moving forward this process should be much easier, noting the group plans to meet regularly to review the absorption rate and provide good data.

Chairman Bryant commented on a chart that staff presented to her yesterday, which has been provided to the consultants.

Council Member Barry Mansfield, City of Ocala, questioned how the assumptions are made relating to growth and development and how the related data is derived. Mr. Shrum advised that the group is tracking 55-plus units, mobile homes and even collecting data based on the number of bedrooms in an effort to get consistent information from all jurisdictions. He commented on the importance of identifying where growth is happening now, noting they are using daily permitting data from the County and municipalities. Mr. Shrum stated it is important to track that data on a regular basis to identify trends. He advised that moving forward he anticipates the group will revisit the data quarterly to true it up.

In response to Mr. Mansfield, Mr. Shrum stated the information will always be a little in arrears due to the lag in the planning process, to getting a permit and a structure built on a property, that property being occupied and there being an impact on a school. He commented on developments that may not build out all the units that are platted, noting the need to track it as it is built. Mr. Shrum reiterated that the projections will be updated at least on a quarterly basis.

Mr. Bouyounes requested confirmation from this Board relating to whether they wish to meet again in September. Ms. Ebaugh stated September/October is the right timeframe and would set the baseline for next year. She stated they are looking to do this on a regular basis, noting they want to start right for the next school year. Ms. Ebaugh advised that the data used as a baseline for every annual review is the 40-day count from the school district. She commented on the desire to align the 40-day count (enrollment data) with the development data that is happening from the local jurisdictions, which would be reviewed during that same September/October timeframe.

In response to Dr. Sarah James, MSCB, Ms. Ebaugh stated the consultant prefers a September meeting, noting they would rather look backwards, then use next year as a baseline for the 40-day count. She clarified that this year's report will contain all the data that has been collected through the 2024/25 school year and next year would be the beginning of next year's cycle. Ms. Ebaugh advised that the consultant would be looking at next year's cycle with the 40-day count and the development data that happened from this calendar year.

Dr. James questioned why the 120 day count would not be used, noting it is the most accurate student enrollment number. Ms. Ebaugh stated the Best Management Practice (BMP) for school districts is to always use the 40-day count as their snapshot in time, noting she is aware that school enrollment changes on a daily basis. She advised that the 40-day count is the count that is reported to the State for enrollment and is also the count used for funding purposes. Ms. Ebaugh stated the 40-day count stays static and is always the number the school district is being paid based upon. She advised that if she looked at the 40-day count one year and then compared the growth projections the next year to February counts or another month's count, then the number is consistently changing. Ms. Ebaugh clarified that if she always uses the 40-day count, every year she can compare the numbers from one year to another and know that she is consistently looking at the same set of data in the same period. She stated the current ILA calls for the development data to be provided to the school district in the spring, but the enrollment numbers being used are from the fall and are not consistent with each other.

In response to Dr. James, Mr. Ayres advised that the changes in enrollment relating to the 40-day count from the 2023/24 school year to the 2025/26 increased by roughly 1,000 students.

Dr. James expressed concern in regard to scheduling a meeting in September and using last year's data, noting the parties will be a year behind. She questioned why the parties cannot meet in late October, utilize the 40-day count, and have up to date information to allow forward planning as to how to address it collectively as an organization.

Mr. Ayres stated when the State sends capacity enrollment reports from the Florida Department of Education (FLDOE), they are all based on that 40 day count, because the full time equivalency funding happens 3 times a year, but during the school year, it's twice. It occurs in October and in February, so with school planning, the 40 day count is the number that is used.

Dr. James advised that she does not disagree with using the 40-day count; however, she disagrees with the timeframe for the meeting. She stated she wants to use the timeliest data for the meeting.

Dr. Allison Campbell, MCSB, commented on the amount of data collection and analysis; as it relates to the timeframe for the next meeting. She advised that the reason there is not accurate data right now is because the planning data from the Counties and municipalities does not align. Dr. Campbell stated MCPS can plan to the best of its

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abilities based on where they know students are right now, but they are unaware of what is being approved without sitting in on the City Planning and Zoning Commission once a month.

Commissioner Stone clarified that the data has been shared, but the entities track things differently. She advised that she does not want the public to believe the County and municipalities were not tracking and providing the data. She noted that the data is tracked appropriately.

Chairman Bryant opined that Dr. Campbell's comments were completely off track from the discussion, noting the parties are trying to determine when to meet again. She stated it was noted at the beginning of the meeting that all the data was not complete; however, the important thing to establish is when to meet again. Chairman Bryant advised that the real question is should the report be given before the 40-day count or after. She opined that the MCSB should decide what information is best for them and provide the most up to date data for its future planning purposes.

School Board Chairman Conrad stated she has only heard wonderful things about the work going on between the TWG and the TWG Subcommittee relating to the efforts to analyze the data. She advised that she has not heard any negative discussion from any entity other than it is tedious work that is taking longer than anticipated. Chairman Conrad expressed gratitude for the work performed to date.

Chairman Bryant stated the date does not have to be determined today, noting the parties understand they will reconvene in the fall for the updated presentation.

Ms. Ebaugh stated the data set being used right now is based off development data from the fall of 2024, and the enrollment data from the fall of 2024. She advised that the data the consultant has now is the benchmark data. Ms. Ebaugh stated moving forward, the fall data (development and school data) will be the benchmark that the report is based upon. She advised that if there were a meeting in October with the new enrollment data, in order to update the report it would be necessary to update the development and enrollment data and have time to analyze how those 2 new pieces of data, which we don't have today, would be added to the information. Ms. Ebaugh commented on concerns relating to the timeframe and reporting on data that is a year old, She stated a compromise could be continuing as things are today, using the development and enrollment data from fall 2024 and at the meeting, if waiting until after October, the consultant could update and provide a section relating to current student enrollment. Ms. Ebaugh clarified that the updated enrollment data would not be part of the study data, it would just be a benchmark so the entities would know what the enrollment data shows.

In response to Commissioner Curry, Ms. Ebaugh advised that the data is looked at in buckets, noting there is a bucket of data that is received from the Property Appraisers Office (PAO) that provides the number of units that are currently built in the County. She stated the consultant also looks at Certificate of Occupancy (CO) data from each jurisdiction, which helps to fill the gap in the PAO lag. Ms. Ebaugh advised that the next bucket of data relates to understanding long-term capacity, which is looking at Future Land Use (FLU) categories and how much potential development exists within them. She stated the next bucket of data contains buildable, platted lots including, antiquated subdivisions, vested lots, approved development orders and other platted lots that only need to go to permitting prior to being constructed. Ms. Ebaugh advised that the next bucket relates to permitted data, which shows how many units are being permitted and are currently under construction usually for a 2 to 3 year period. She stated finally they look at the certificate of occupancy data to understand how many of those permits have

been constructed and which ones should be removed. Ms. Ebaugh advised that she looks at each bucket in their entirety, independently, but also looks at them to correspond and communicate with each other. She commented on the challenges associated with bringing data from multiple jurisdictions into those buckets, when they may all count that data in different ways. Ms. Ebaugh stated because student generations are different for single family, multi-family and mobile homes, they are divided into those different types of units and the buckets are reviewed 3 times. She advised that this process is not easy; however, in the end it creates an information source that can be utilized moving forward provided it is updated as described by Mr. Shrum. Ms. Ebaugh commented on the cooperation from the jurisdictions, noting now they know what the challenges are and understand what questions need to be answered, now they just need time to finish the study to provide really good data.

In response to Commissioner Stone, Dr. Campbell questioned if the TWG thinks the proposed timeline is appropriate to look over amendments to the ILA and reconvene this group to have a conversation.

Ms. Ebaugh stated while the data revisions are being conducted, the consultant will also be re-vetting the changes to the ILA with each jurisdiction, noting those 2 things are happening concurrently.

Mr. Ayres advised that there may be a need for 2 meetings of the TWG: one to receive data from the TWG Subcommittee and discuss the information and a second meeting to come back and finalize. He stated this may need to occur prior to the fall PSPO meeting. Chairman Bryant advised that the entities should perform the necessary work and when an appropriate date is known, it can be scheduled for the parties can reconvene.

Mr. Ayres commented on the huge amount of cooperation from the County and municipalities, noting the TWG Subcommittee is getting not only the baseline data, but also the ongoing data. He stated he is receiving emails relating to new developments.

Commissioner Stone advised that there are different units that are approved based on zoning whether it is urban or rural and it will never be precise; however, the data will be provided to the best of the County's ability to assist with planning.

Mayor Walter Green, City of Dunnellon, stated citizens there want to hear more about the 5,10,15 and 20 year projections. He opined that the public is more interested in the information to base projections on, rather than when meetings are held. He commented on the explosive growth in the southwest portion of the County. Mayor Green expressed appreciation for the work being performed.

PUBLIC COMMENT

Chairman Conrad opened the floor to public comment.

There being none, School Board Chairman Conrad advised that public comment is now closed.

BOARD DISCUSSION AND CLOSING REMARKS

Mr. Mansfield expressed appreciation for the TWG for their hard work.

Commissioner Stone advised that this has been a very cooperative opportunity and wants to ensure this meeting does not make it seem as if it has not. She commented on the time and effort involved, noting she looks forward to what will be brought back in the fall.

Commissioner Curry expressed appreciation towards MCPS Superintendent Dr. Diane Gullett for the personal working relationship they have had for years.

Chairman Bryant expressed appreciation towards Commissioner Stone for her work on

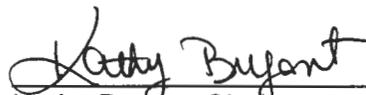
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the TWG.

School Board member Nancy Thrower concurred, noting serving on the TWG is not for the faint of heart. She stated in her experience of being on the TWG from the beginning with Commissioner Stone has been a refreshing and new direction for all parties. Ms. Thrower advised that the group has evolved and commented on the critical nature of rapid sharing of information. She stated things are happening fast and commented on having the opportunity to have access to each other's information in ways that all agree are as accurate as possible, so the parties can continue to plan for one of the greatest places in the world to live, work and play.

School Board Chairman Conrad expressed appreciation towards the BCC and County staff, the TWG and the Subcommittee, noting she looks forward to meeting again in the fall.

There being no further business to come before the Board, the meeting thereupon adjourned at 11:35 a.m.


Kathy Bryant, Chairman

Attest:


Gregory C. Harrell, Clerk



Marion County

Board of County Commissioners Workshop

Agenda Item

File No.: 2026-22428

Agenda Date: 4/1/2026

Agenda No.: 1.

SUBJECT:

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

DESCRIPTION/BACKGROUND:

Today's meeting convenes the Marion County School Board, the City of Ocala, the City of Belleview, the City of Dunnellon, the Town of Reddick, the Town of McIntosh, and the Marion County Board of County Commissioners. This collaboration is conducted in accordance with the Marion County Third Amended and Restated Interlocal Agreement for Public School Facility Planning (ILA), adopted in 2023, and is pursuant to Sections 163.31777 and 1013.33(2), Florida Statutes. Florida Statutes requires each county and its municipalities must enter into an ILA with the district school board to formally establish how local government planning processes and school district planning will be coordinated.

The ILA further requires these governing bodies to meet at least annually, and that one elected official from each governing body and staff meet more frequently as a Technical Working Group (TWG). A TWG subcommittee composed of the technical staff from each agency has been routinely meeting, sharing and reviewing development data to assist the school district with their immediate and long-range planning efforts.



Marion County

Board of County Commissioners Workshop

Agenda Item

File No.: 2026-22424

Agenda Date: 4/1/2026

Agenda No.: 2.

SUBJECT:

**Marion County Public Schools Update, Dr. Danielle Brewer, Ed.D., Superintendent of Schools,
Marion County Public Schools**

Marion County Public Schools Update

Dr. Danielle Brewer

Marion County Board of County
Commissioners Workshop
April 1, 2026

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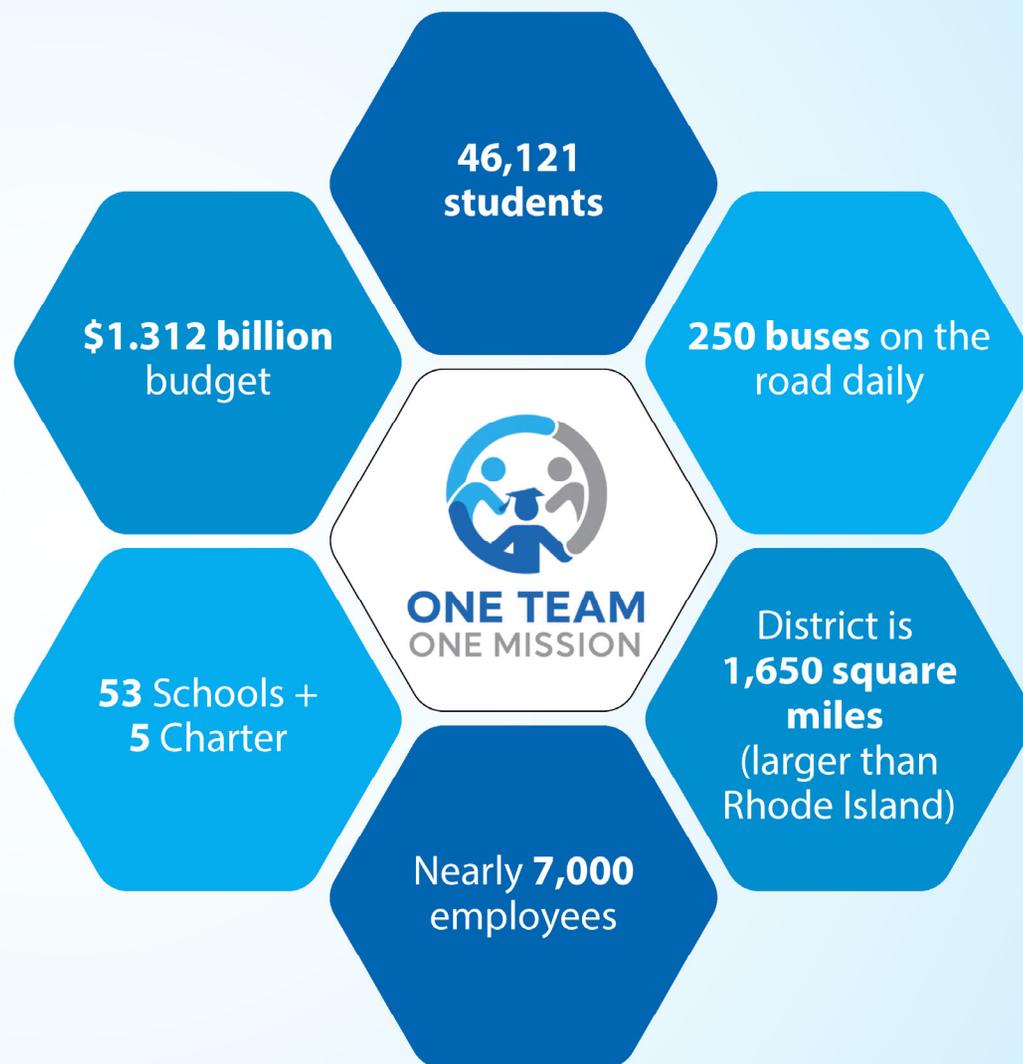


MCPS

MARION COUNTY PUBLIC SCHOOLS

"Helping Every Student Succeed"

About MCPS



Slide 1

School Board Priorities

August 2026: South Marion High School

- First new high school in 26 years (West Port High)
- Opening capacity of 2,011 students

August 2027: Lake Weir Middle School Replacement

- Original school constructed in 1954

August 2028: Belleview Elementary/Belleview Santos Combined School

- Belleview Elementary students will move to Lake Weir Middle for one year

TBD: Consolidation of north end elementary campuses

- Community meetings were held and input being gathered on the website





Email me with any questions!



Scan me!

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An Equal Opportunity School District

Slide 3



Marion County

Board of County Commissioners Workshop

Agenda Item

File No.: 2026-22426

Agenda Date: 4/1/2026

Agenda No.: 3.

SUBJECT:

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

DESCRIPTION/BACKGROUND:

See attached.

UPDATED 03/31/2026
(slides 18, 20, 21, 22, 23,
and 47 were revised)

Tentative Education Facilities Plan

April 1, 2026

Public Schools Planning Officials



*in partnership
with*



*Proposed
ILA
Revisions*



01

*Project
Recap*



02

*Development
Data
Update*



03

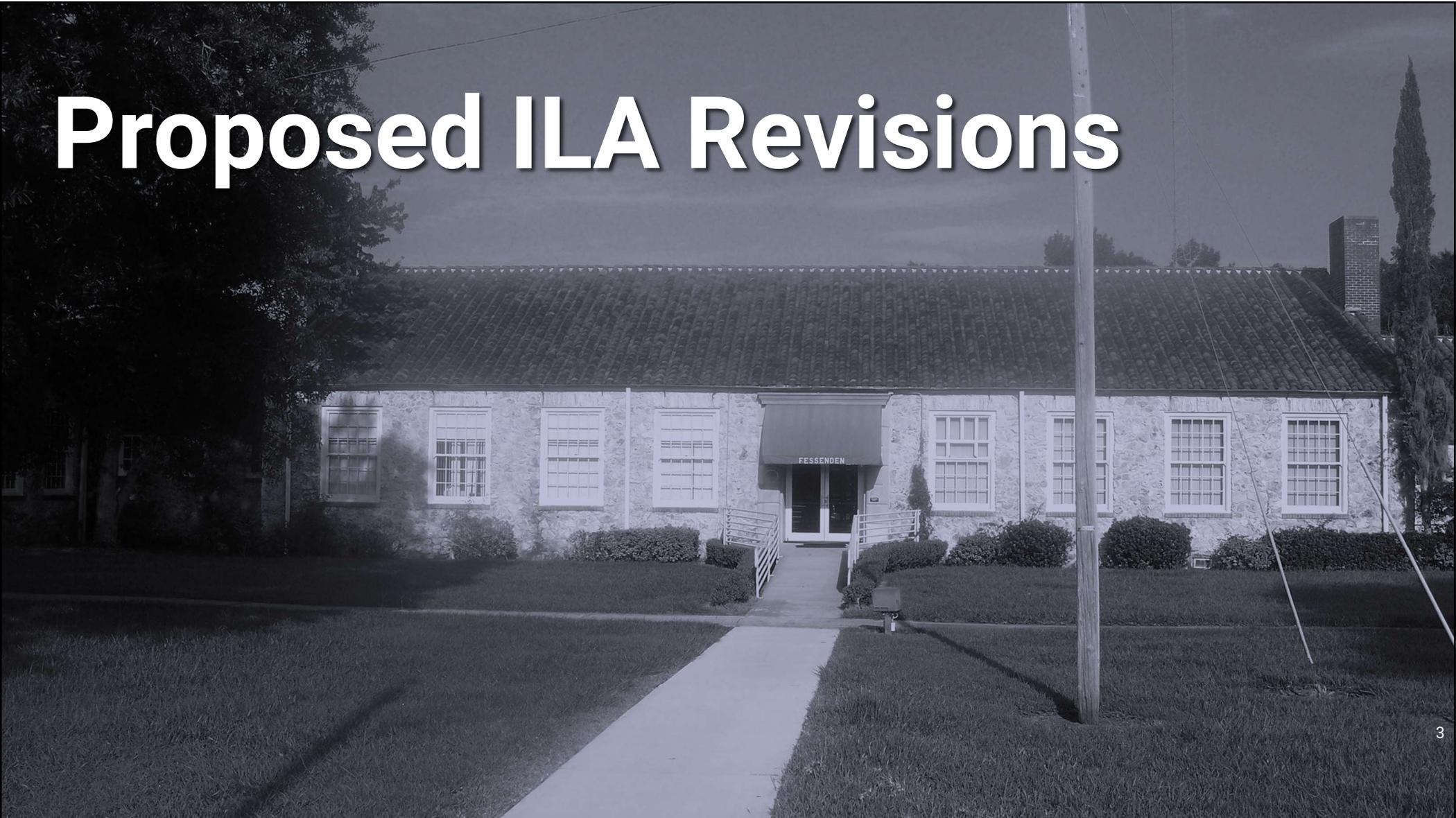
*Data
Assessment
Methodology*



04

AGENDA

Proposed ILA Revisions





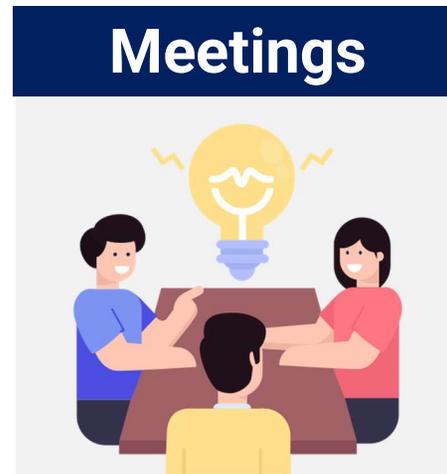
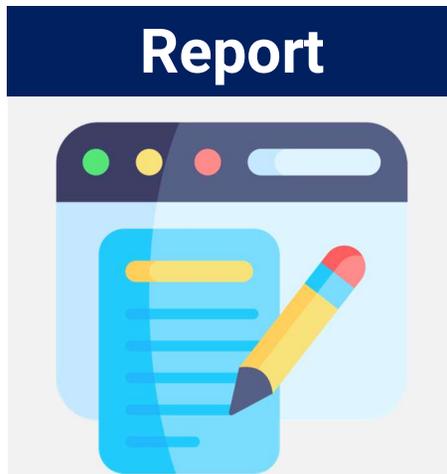
Proposed ILA Revisions

Amendments Overview

Focus of changes.

Institutionalize improved processes for future planning efforts.

Clarified issues.



Data



Report



Meetings



~~1.3. Capital Outlay, Full-Time Equivalent (COFTE) Projections (deleted)~~

1.40 Student Generation Rate (added)

2.1 Technical Working Group (TWG) Meetings (revised)

2.2 Public Schools Planning Officials (PSP0) Joint Planning Workshop (revised)

3.2 Student Projections (revised)

4.5 Data Compilation (revised)

Data

4.6 Report Date (revised)

[Appendix B: Data Request Summary \(added\)](#)

[Appendix A: Timeline \(added\)](#)

Report



Meetings



SECTION 01

Project Recap





Project Recap

Purpose



SCHOOL COLLABORATION WITH LOCAL GOVERNMENTS

**DATA-BASED SCHOOL
CAPACITY & GROWTH**



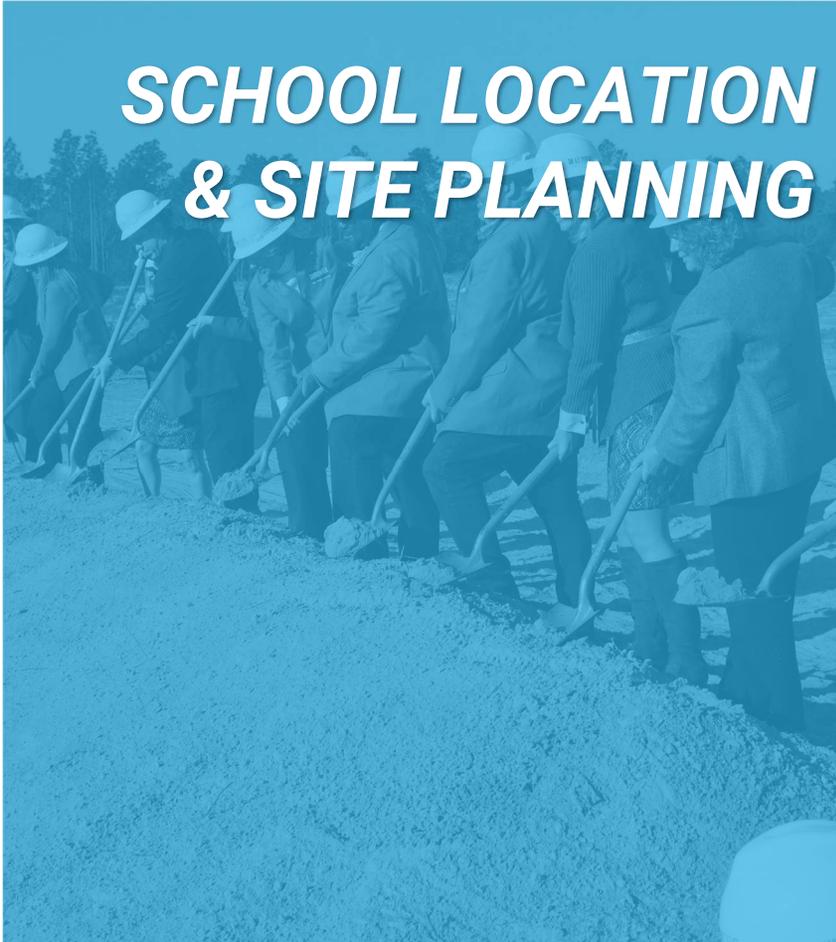
8



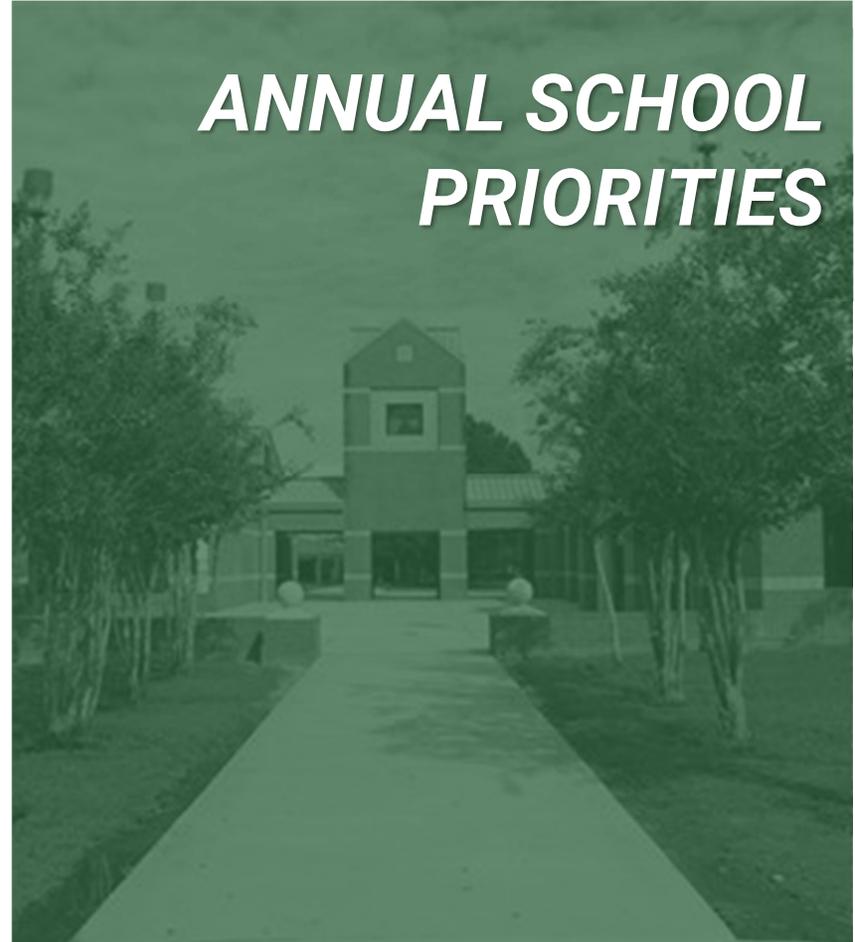
Project Recap

Objectives

SCHOOL LOCATION & SITE PLANNING



ANNUAL SCHOOL PRIORITIES





Project Recap

Partnerships

JURISDICTIONS



COMMITTEES

Public School Planning Officials

Technical Working Group

Technical Working Group
Subcommittee



Project Recap

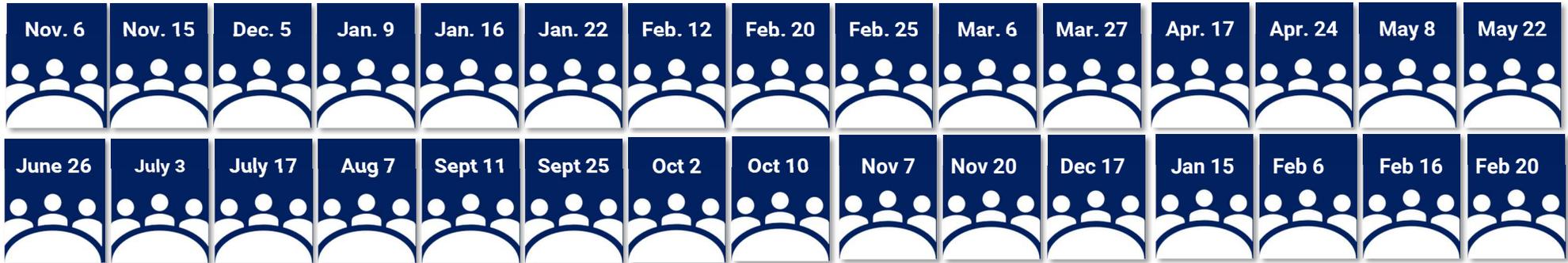
Prior Meetings

TWG COMMITTEE

PSPPO



TWG SUBCOMMITTEE



SECTION 02

Development Data Update



12



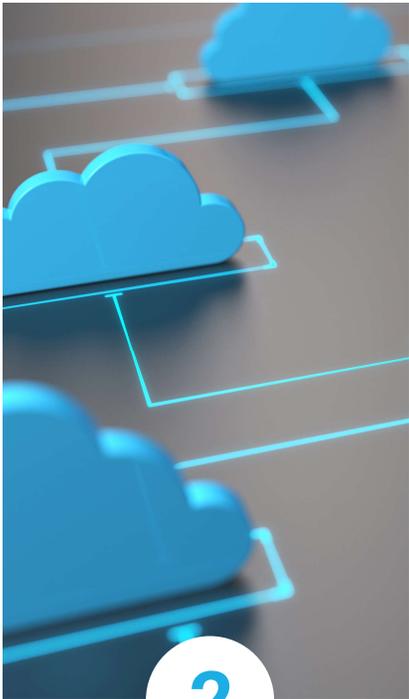
Development Data Update

Process



1

RESEARCH



2

REQUEST



3

VERIFY



4

ANALYZE



5

PLAN



Development Data Update

Levels of Analysis

Future Land Use

identifies where and how many units are possible in the future

Development Approval

indicates where and how many units could possibly develop now

Permitting

shows units under construction and imminent enrollment increases

What it is.

- Policy-based buildout ceiling from adopted Future Land Use (FLU) on vacant land

Why it matters.

- Sets the maximum development potential
- Guides long-term growth decisions

What's considered.

- All vacant lands within a jurisdiction that allows residential development by future land use designation

Method

- Gather and vet Florida Department of Revenue (FDOR) land use codes.
- FDOR land use codes identify vacant parcels that allow residential development.
- Calculate maximum dwelling units using FLU density limits.
- Multiply vacant acreage by the maximum density allowed in the FLU category.

Outcome

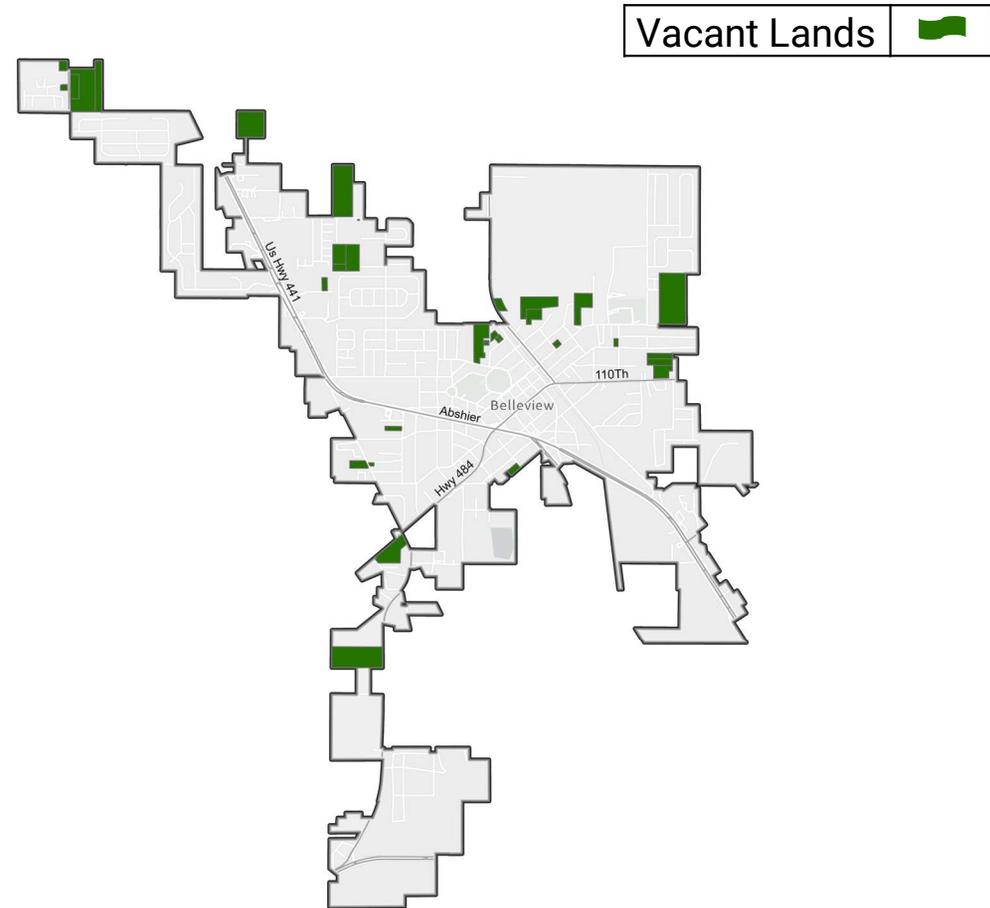
- Establish the policy-based ceiling for residential growth.
- Identify where housing growth could occur over the long term.
- Provide the outer boundary for potential future enrollment growth.



Future Land Use

Bellevue

FLU	Parcels	Vacant Acreage	Max DU per AC	Total Units Possible (DU)
A	3	23.2	0.333	8
NR	3	11.1	4	44
LDR	15	45.8	6	275
MDR	10	30.4	8	243
HDR	2	21.6	11	238
Total	33	132.1	--	808



Data as of September 2025



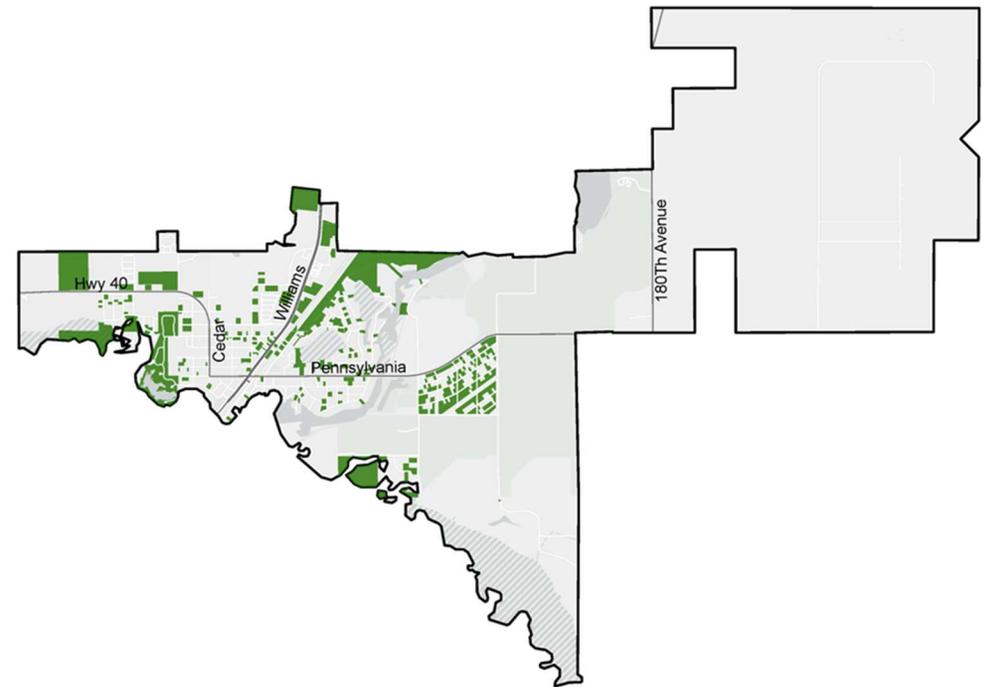
Future Land Use

REVISED 03/31/2026

Dunnellon

Vacant Lands 

FLU	Parcels	Vacant Acreage	Max DU per AC	Total Units Possible (DU)
AG	1	0.08	0.1	0
LDR	69	94.2	2.5	236
MDR	209	91.4	5	457
HDR	12	2.3	12	28
TN-8	33	12.6	8	101
TN-12	9	5.0	12	60
MU	1	29.1	12	349
Total	334	234.68	--	1,231



Data as of September 2025

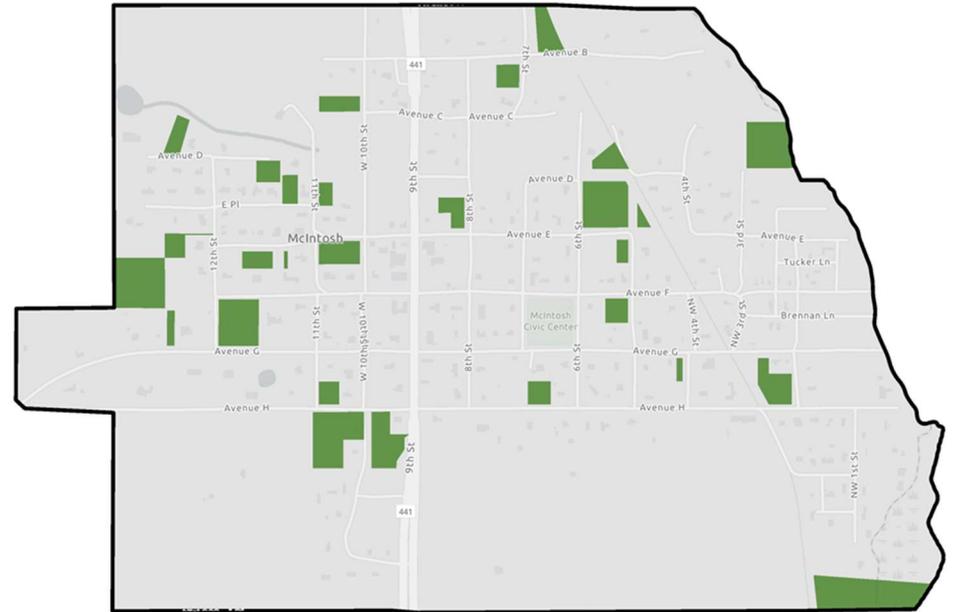


Future Land Use

McIntosh

Vacant Lands 

FLU	Parcels	Vacant Acreage	Max DU per AC	Total Units Possible (DU)
A	0	0	0.1	-
LDR	27	17	2	34
LFR	1	3	2	7
HDR	0	0	6	-
Total	28	20	--	41



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Data as of September 2025



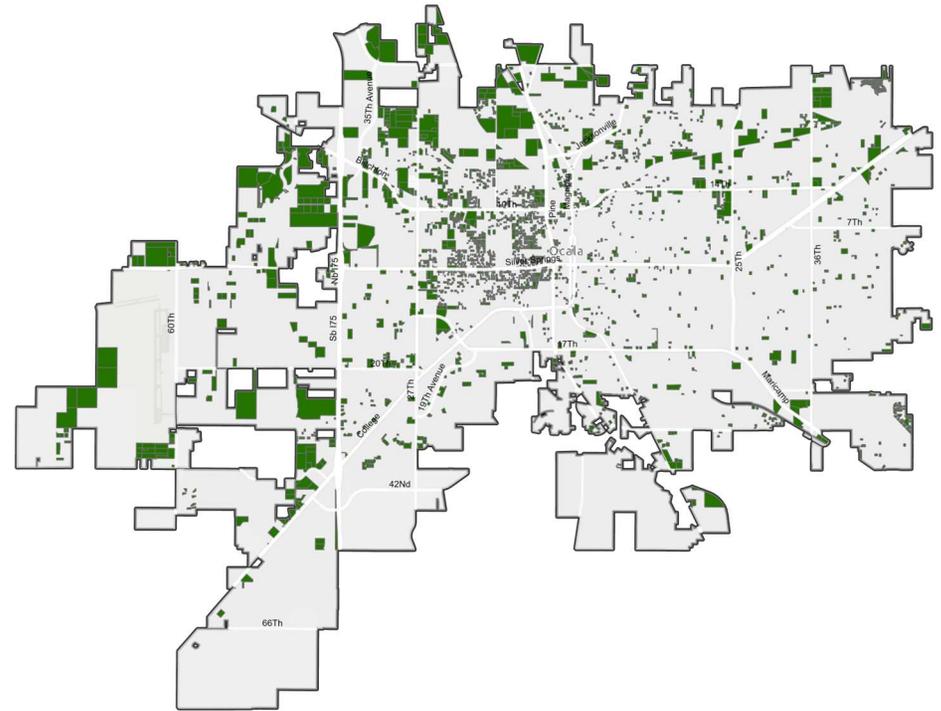
Future Land Use

REVISED 03/31/2026

Ocala

Vacant Lands 

FLU	Parcels	Vacant Acreage	Max DU per AC	Total Units Possible (DU)
HI/CC	177	46	60	2,760
MI/SD	146	454	30	13,620
LI	570	903	18	16,254
NHOOD	1,864	951	12	11,412
EC	211	1,098	24	26,352
PUB	3	38	0	0
Total	2,971	3,490	--	70,398



20

Data as of September 2025



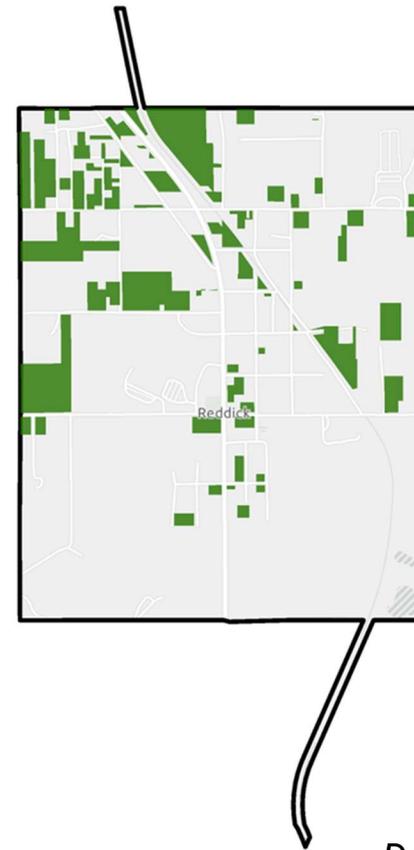
Future Land Use

REVISED 03/31/2026

Reddick

Vacant Lands 

FLU	Parcels	Vacant Acreage	Max DU per AC	Total Units Possible (DU)
RES-1	28	51	1	47
RES-2	95	45	4	114
Total	123	96	--	161



Data as of September 2025



Future Land Use

Summary

	Bellevue	Dunnellon	McIntosh	Ocala	Reddick	Unincorp.	Total
<i>Vacant Acreage</i>	132.1	234.68	20	3490	96	40,477.9	44,450.68
<i>Maximum Units Possible</i>	808	1,231	41	70,398	161	71,347	143,986

What it is.

- Approvals to advance to the permitting stage

Why it matters.

- Represents committed investment
- Indicator of approved future growth

Method

- Compile approved development orders, plats, and site plans from each jurisdiction.
- Confirm approvals remain active and have not expired or been withdrawn.
- Remove nonresidential projects and completed developments.
- Identify remaining units by subtracting built units from total approved units.

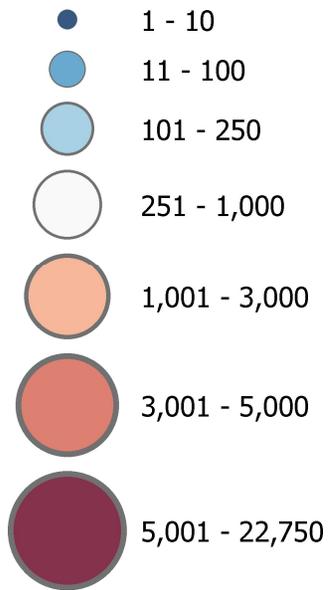
Outcome

- Identify projects currently in the development pipeline.
- Estimate near-term housing growth that will generate new students.
- Provide the intermediate stage between long-range potential and active construction.

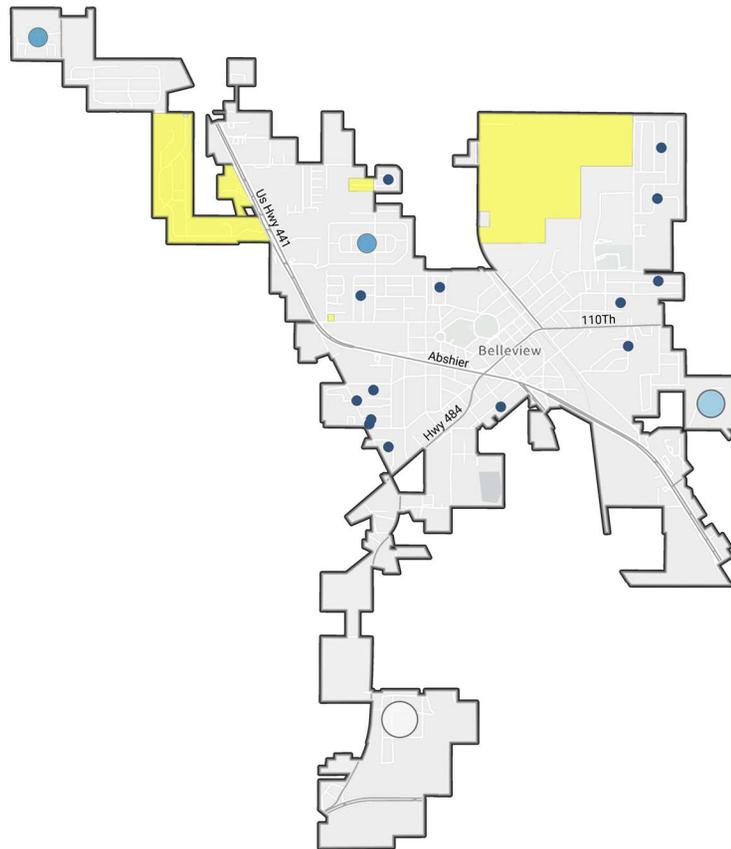
Development Approval

Bellevue

Remaining Units



PUDs 





Development Approval

Bellevue: 1,579 Units

Development Information			Approved Units				Developed Units				Remaining Units			
Name	Review Status	Source	Total	SFR	MH	MFR	Total	SFR	MH	MFR	Total	SFR	MH	MFR
Autumn Glen Phase 1	Active	Jurisdiction	164	164	0	0	163	163	0	0	1	1	0	0
Autumn Glen Phase 2	Active	Jurisdiction	145	145	0	0	44	44	0	0	101	101	0	0
Bellehaven	Active	Jurisdiction	1,024	714	0	310	0	0	0	0	1,024	714	0	310
Bellevue Highlands	Active	Jurisdiction	34	34	0	0	33	33	0	0	1	1	0	0
Bennah Oaks Phase 1	Active	Jurisdiction	162	162	0	0	106	106	0	0	56	56	0	0
Briar Patch MHP	Active	Jurisdiction	49	0	49	0	0	0	0	0	49	0	49	0
Cobblestone	Active	Jurisdiction	75	75	0	0	71	71	0	0	4	0	0	0
Coral Gables	Active	Jurisdiction	85	0	0	85	24	0	0	24	66	0	0	66
Coral Ridge	Active	Jurisdiction	211	211	0	0	193	193	0	0	18	18	0	0
Coral Ridge 1st Addition	Active	Jurisdiction	75	75	0	0	73	73	0	0	2	2	0	0
Coral Ridge North	Active	Jurisdiction	34	34	0	0	31	31	0	0	3	3	0	0
Diamond Ridge Unit 1	Active	Jurisdiction	73	73	0	0	70	70	0	0	3	3	0	0
Diamond Ridge Unit 2	Active	Jurisdiction	130	130	0	0	120	120	0	0	10	10	0	0
Fern Meadows	Active	Jurisdiction	35	35	0	0	33	33	0	0	2	2	0	0
Kreb's Corner	Active	Jurisdiction	20	20	0	0	12	12	0	0	8	8	0	0
Legacy City Plat	Active	Jurisdiction	1	1	0	0	0	0	0	0	1	1	0	0
Legacy City Plat	Active	Jurisdiction	1	1	0	0	0	0	0	0	1	1	0	0
Legacy City Plat	Active	Jurisdiction	1	1	0	0	0	0	0	0	1	1	0	0
Legacy City Plat	Active	Jurisdiction	1	1	0	0	0	0	0	0	1	1	0	0
Legacy City Plat	Active	Jurisdiction	1	1	0	0	0	0	0	0	1	1	0	0
Villas of Bellevue	Active	Jurisdiction	131	131	0	0	131	131	0	0	0	0	0	0
Wonderland	Active	Jurisdiction	38	38	0	0	34	34	0	0	4	4	0	0
Wooded Acres Unit 2	Active	Jurisdiction	12	0	12	0	11	0	11	0	1	0	1	0

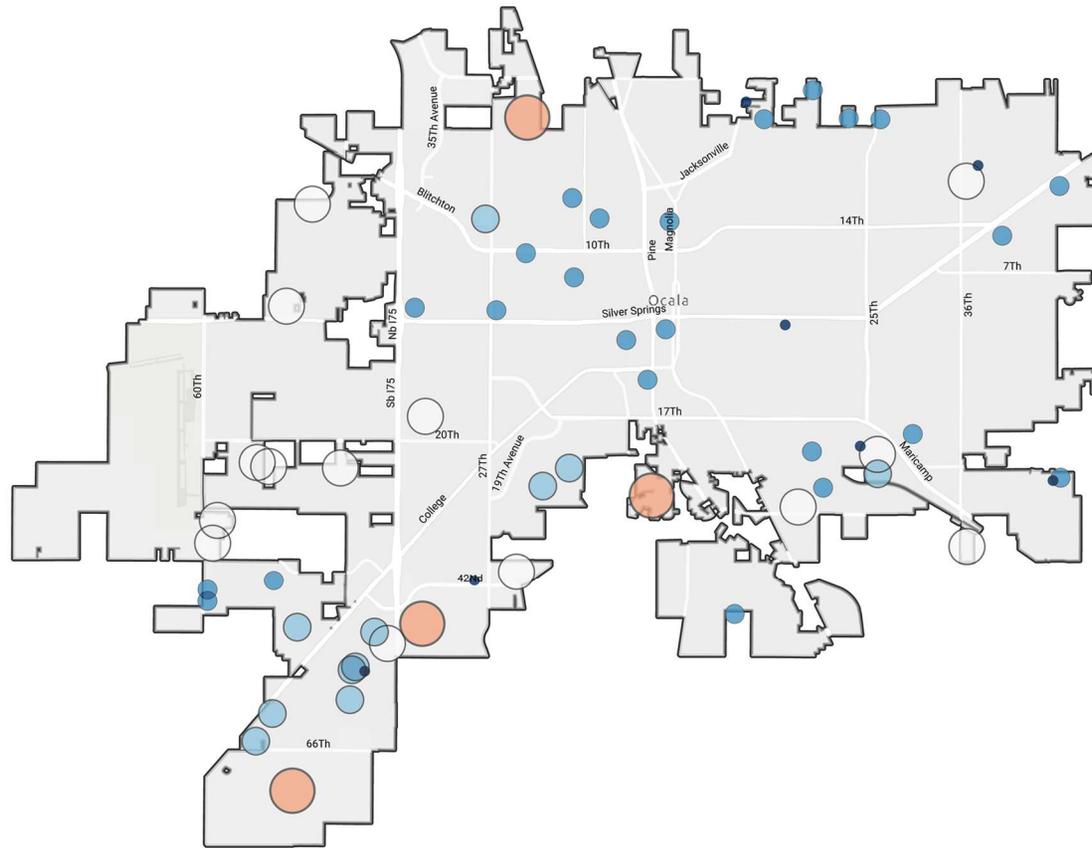
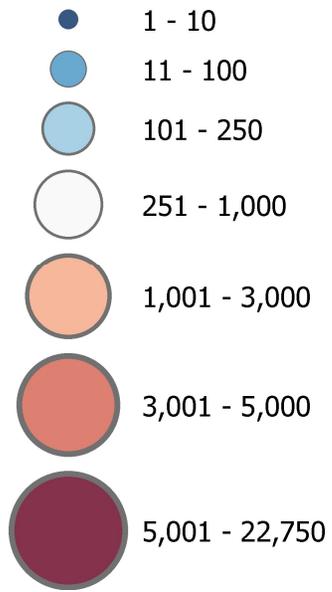
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Data as of September 2025

Development Approval

Ocala

Remaining Units



Development Approval

Ocala: 16,790 Units

Development Information			Approved Units		Developed Units		Remaining Units		Age Restricted From Count	
Name	Review Status	Source	Total	SFR	MFR	SFR	MFR	Total		
42nd Street Flower LLC	Expired, under Heatbrook		0	0	0	0	0	0		
501 NE SANCHEZ	APPROVED		4	0	4	0	4	0		
705 Broadway Townhomes	APPROVED		3	3	0	3	0	0		
Avalon Bldgs 100 & 200	CONDITIONAL APPROVAL		20	0	20	0	20	0		
Bel Cantio Ocala West Apts	APPROVED		272	0	272	0	272	0		
Bellechase PUD			390	390	0	343	0	47	0	47
BIRGE AND HELD OCALA	CONDITIONAL APPROVAL		264	0	264	0	0	264	264	
BLITCHTON TOWNHOMES	CONDITIONAL APPROVAL		11	11	0	0	0	11	0	11
Cala Hills			250	250	0	132	0	118	0	118
CAMPALTO FINAL PLAT	RECORDED		4	4	0	4	0	0	0	0
CHI OCALA RANCHO			468	0	468	0	0	468	468	
COLLEGE PARK TOWNHOMES; COLLEGE PARK TOWNHOMES FINAL PLAT	APPROVED; RECORDED		21	21	0	21	0	0	0	0
Coso-Ocala (Anna Jo Partnership)	Active		459	0	459	0	42	0	0	0
County Green			900	0	900	0	0	900	900	No
Crystal Park Apartments	APPROVED		144	0	144	0	144	144	144	
DEERWOOD (Built)			328	0	328	0	328	0	0	0
Emerson Pointe			72	0	72	0	0	72	72	
EMERSON POINTE PHASE 1 FINAL PLAT	RECORDED		0	0	0	0	45	0	0	0
Enclave at Cala Hills Final Plat	UNDER REVIEW		104	104	0	0	0	104	0	104
ETHAN'S GLEN (Built)			178	0	178	0	178	0	0	0
ELIUS ENTERPRISES	CONDITIONAL APPROVAL		16	0	16	0	16	16	16	
Evergreen Village			0	0	0	0	0	0	0	0
Fore Ranch PUD - Brighton Townhomes, Cimarron, Saddle Creek Phase, Lakeview Village, White Oak Village, Wynchase			1,940	1,940	0	1,908	0	32	0	32
FORT KING TOWNHOMES	APPROVED		8	0	8	0	0	8	8	
GEHL PD			0	0	0	0	0	0	0	0
GEHL PD			0	0	0	0	0	0	0	0
GEHL PD			0	0	0	0	0	0	0	0
GEHL PD			0	0	0	0	0	0	0	0
Gilliams Sub			0	0	0	0	0	0	0	0
GREEN MULTI FAMILY DEVELOPMENT	APPROVED		9	0	9	0	0	9	9	
Greenway Preserve (Green Family Trust PD)			55	55	0	0	55	0	55	
HAMMOCK PARK	CONDITIONAL APPROVAL		34	0	34	0	0	34	34	
Haselden PD	PD		310	0	310	0	0	310	310	
Heath Brook PUD			1,250	1,250	0	799	228	223	0	223
HEATH PRESERVE PHASE 1 & 2 FINAL PLAT; Heath Preserve Phase 3 Final Plat	RECORDED/UNDER REVIEW		414	414	0	62	0	352	0	352
HEATHBROOK APARTMENTS	APPROVED		160	0	160	0	0	160	160	
Heather Trace Ph I/II			52	52	0	47	0	5	0	5
Hidden Village/18th Avenue Medical Park			0	0	0	0	0	0	0	0
Hidden Village/18th Avenue Medical Park			0	0	0	0	0	0	0	0
HILLPOINTE SE 31ST STREET	UNDER REVIEW		324	0	324	0	0	324	324	
HILLPOINTE SW 40TH AVE	APPROVED		240	0	240	0	0	240	240	
Hilltop Manor	SUBMITTED		4	0	4	0	4	0	0	0
Impact Development, SE 31st Street at SE 18th Ave			260	0	260	0	260	260	260	
KAS OCALA			0	0	0	0	0	0	0	0
Keys at Heath Brook			146	0	146	0	0	146	146	
La Jolla 200			50	50	0	50	0	0	0	0
LAKE LOUISE APARTMENTS			1,596	0	1,596	0	324	0	1,272	1,272
LAMPLIGHTER LEGACY	APPROVED		102	0	102	0	102	0	0	0
LIVINGSTON PARK			39	39	0	6	0	33	0	33

LONGBRANCH OCALA	APPROVED		225	0	225	0	0	0	225	225	
MAGNOLIA VILLAS EAST			53	53	0	30	0	23	0	23	
MAGNOLIA VILLAS WEST			38	38	0	37	0	1	0	1	
NORTH MAGNOLIA RESIDENTIAL PLAT	UNDER REVIEW		20	20	0	0	0	20	0	20	
DAK VALLEY PD			196	0	0	0	0	0	0	0	Yes
Dakcrest Park Conceptual Sub	UNDER REVIEW		85	85	0	0	0	85	0	85	
Ocala 42nd Street Residential (Grand Oaks)			528	528	0	0	0	528	0	528	
Ocala Landings (Fox View at Hunt Club)			44	44	0	0	0	44	0	44	
Ocala Landings (Fox View at Hunt Club)			44	44	0	0	0	44	0	44	
Old Blitchton Road Multi Family	APPROVED		14	0	14	0	0	0	14	14	
ONE FORT KING SUBDIVISION FINAL PLAT	RECORDED		24	24	0	0	0	24	0	24	
PADDOCK RIDGE EAST			0	0	0	0	0	0	0	0	
PADDOCK RIDGE EAST			0	0	0	0	0	0	0	0	
PADDOCK RIDGE EAST			0	0	0	0	0	0	0	0	
PADDOCK RIDGE EAST			0	0	0	0	0	0	0	0	
PADDOCK RIDGE EAST			0	0	0	0	0	0	0	0	
Paddock Villas			91	91	0	91	0	0	0	0	
PARK VIEW AT MARICAMP	CONDITIONAL APPROVAL		224	0	224	0	0	0	224	224	
PHOENIX PLACE / PHOENIX HEIGHTS			73	73	0	35	0	38	0	38	
Pine Oaks Preserve			88	88	0	0	88	0	88	88	
Pointe Grand on SW 20th Street			360	0	360	0	0	0	360	360	
Puravida			100	100	0	0	0	100	0	100	
Red Oak			2,360	700	1,660	0	0	700	1,660	3,660	
RIDGE AT HEATH BROOK PH 1 FINAL PLAT; RIDGE AT HEATH BROOK CONCEPTUAL; Ridge at HB PH 2 & 4 Imp Plan	RECORDED/APPROVED/UNDER REVIEW		99	99	0	87	0	8	0	8	
RIDGE AT HEATH BROOK PH 2 FINAL PLAT	RECORDED		170	170	0	0	0	170	0	170	
Ridge at Heath Brooke PH 3 Final Plat	UNDER REVIEW		122	122	0	0	0	122	0	122	
RIVENDELL			27	0	27	0	25	0	2	2	
SADDELEWOOD VILLAS	APPROVED		60	60	0	60	0	0	0	0	
Saving Mercy- MERCY VILLAGE APARTMENTS	APPROVED		144	0	59	0	59	0	85	85	
Shady Hollow Apartments			50	0	50	0	50	0	0	0	
Silver Springs PD			47	0	0	0	0	47	0	47	
Southern Hills LTD			0	0	0	0	0	0	0	0	
STONEWOOD VILLAS			131	0	131	0	131	0	0	0	
SW 38TH AVENUE APARTMENTS	APPROVED		432	0	432	0	432	0	0	0	
TBMJ at SW 60th Ave and SW 38th Street			375	0	375	0	0	0	375	375	
TBMJ at SW 60th Ave and SW 38th Street			375	375	0	0	0	375	0	375	
VASQUEZ APARTMENTS	APPROVED		14	0	14	0	0	0	14	14	
Vasquez Apartments Ocala	APPROVED		13	0	13	0	0	0	13	13	
VILLAGE WEST			76	76	0	76	0	0	0	760	
Villas of Stoneidge			48	48	0	28	0	20	0	20	
WATERMARK OCALA	APPROVED		320	0	320	0	320	0	0	0	
WATULA SOUTH FINAL PLAT	RECORDED		9	9	0	7	0	2	0	2	
West Oak PD			2,028	100	1,928	37	80	63	1,848	1,911	
Winding Oaks (Excl Ph 2-4 & Apt Site Plan)			1,948	1,140	808	0	0	1,140	780	1,948	
Wintergreen			685	0	685	0	0	0	685	685	
WOODFIELD CROSSING			137	137	0	86	0	51	0	51	
WOODFIELD OFFICE PD			0	0	0	0	0	0	0	0	
WOODLAND PLACE APARTMENTS	APPROVED		6	0	6	0	6	0	0	0	
WOODLAND VILLAGES			294	0	294	0	292	0	2	2	
Worldwide Apartments PUD			0	0	0	0	0	0	0	0	

Data as of September 2025

Development Approval

Unincorporated Marion County: 47,583

Data as of September 2025

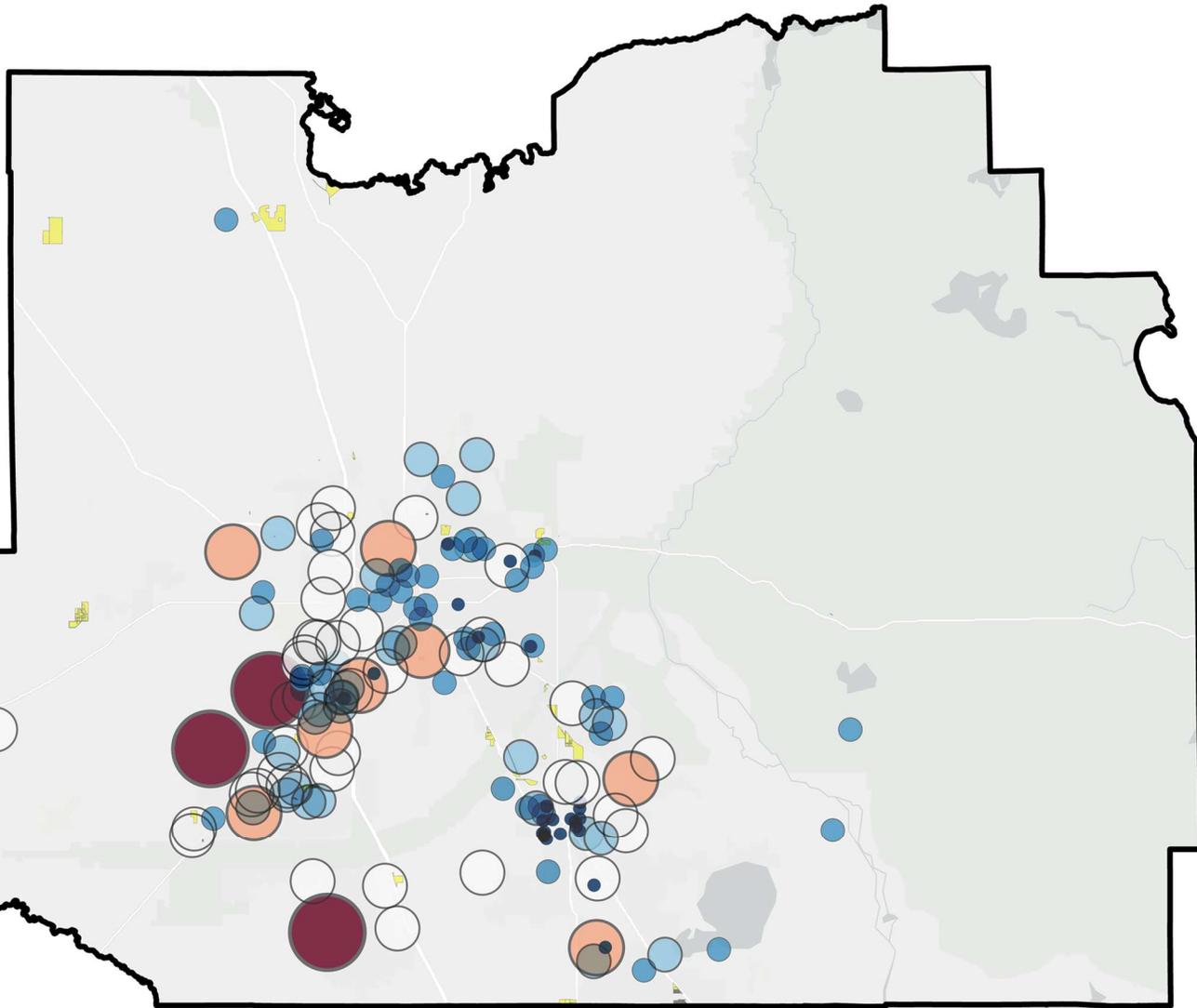
Development Information			Approved Units			Developed Units		Remaining Units			Age Restricted
Name	Review Status	Source	Total	SFR	MFR	SFR	MFR	SFR	MFR	Total	Removed From Count
Canopy Oaks			0	0	0	0	0	0	0	0	
Stonebrook Commons	APPROVED		258	0	258	0	0	0	258	258	
Cheung & Wong MF	APPROVED		59	0	59	0	0	0	59	59	
Ocala 85	APPROVED		337	337	0	0	0	337	0	337	
NE 36th Ave	APPROVED		157	0	0	0	0	0	0	0	
SW 100th Street - East PUD	APPROVED		180	180	0	0	0	180	0	180	
Luxury Leased Homes	APPROVED		314	0	314	0	0	0	314	314	
NJH	APPROVED		387	101	286	0	0	101	286	387	
Sabal Crossing	APPROVED		293	0	0	0	0	0	0	0	
Sabana Farms	APPROVED		270	270	0	0	0	270	0	270	
Landfair North	APPROVED		184	0	0	0	0	0	0	184	
Quail Preserve	APPROVED		54	54	0	0	0	54	0	54	
Emerald Village	APPROVED		1,200	0	1,200	0	0	0	1,200	1,200	
Golden Oak	APPROVED		895	502	393	0	0	502	393	895	
Martingale	APPROVED		190	0	0	0	0	0	0	190	
1103rd Street	APPROVED		249	0	249	0	0	0	249	249	
Maro 200	APPROVED	PUD Master Plan AR 31051	499	177	322	0	0	177	322	499	
SW 100th Street- West PUD	APPROVED		210	210	0	0	0	210	0	210	
WEC Jockey Club	APPROVED		93	93	0	0	0	93	0	93	
West Point	APPROVED		513	0	513	0	0	0	513	513	
Woodridge Place	APPROVED		240	240	0	0	0	240	0	240	
SWS	APPROVED		370	0	0	0	0	0	0	370	
Scalio Lake Weir	APPROVED		14	14	0	0	0	14	0	14	
Grand Oaks	APPROVED		107	107	0	0	0	107	0	107	
Prosperity	APPROVED		151	151	0	0	0	151	0	151	
Maro at SW 20th	APPROVED		801	801	0	0	0	801	0	801	
Berlitz PUD	APPROVED		40	0	40	0	0	0	40	40	
Carissa Oaks North	APPROVED	Major Site Plan ARN 28414	640	0	640	0	288	0	352	352	
Carissa Oaks South	APPROVED		10	10	0	0	0	10	0	10	
Ocala South Townhomes	APPROVED		360	0	360	0	0	0	360	360	
Harrison PUD	APPROVED		97	97	0	0	0	97	0	97	
Hillpointe 484	APPROVED		161	0	0	0	0	0	0	0	
Foxwood Commons	APPROVED		396	0	396	0	0	0	396	396	
Hillpointe SR 200	APPROVED	Major Site Plan AR 32462	324	0	324	0	228	0	96	96	
The 103 Invest	APPROVED		165	0	165	0	0	0	165	1,656	
Renaissance	APPROVED		64	0	0	0	0	0	0	0	
Sandy Clay	APPROVED		452	344	108	0	0	344	108	452	
Corta Commons	APPROVED	Major Site Plan Revised ARN31416, 32368	30	0	30	0	30	0	0	0	
Base Dev Land Trust	APPROVED		260	260	0	0	0	260	0	260	
Silver Springs Shores East	APPROVED		54	0	0	0	0	0	0	54	
Homestead Villas	APPROVED		50	50	0	0	0	50	0	50	
110th Street PUD	APPROVED		480	0	480	0	0	0	480	480	
On Top of the World	BUILDING PERMITTING		32,400	0	0	9,151	0	23,249	0	22,750	
Vale and Glen Townhomes	BUILDING PERMITTING		307	0	307	0	98	0	209	209	
Freedom Crossing Phase 2	BUILDING PERMITTING		185	185	0	185	0	0	0	0	
Gaekwad Village	BUILDING PERMITTING	Major Site Plan ARN 29644/31680	1,514	774	770	0	34	774	736	1,510	
Sunset Hills	BUILDING PERMITTING		350	350	0	115	0	235	0	235	
Aurora Oaks	BUILDING PERMITTING	Improvement Plan ARN 32090	1,250	108	1,142	41	197	67	1,012	973	
Pioneer Ranch	BUILDING PERMITTING		1,080	810	270	252	0	558	270	828	
Lake Diamond	BUILDING PERMITTING		411	411	58	411	58	0	0	0	
Juliette Falls	BUILDING PERMITTING		542	542	0	151	0	391	0	391	
Evergreen	BUILDING PERMITTING		437	437	0	177	0	260	0	260	

Name	Review Status	Source	Total	SFR	MFR	SFR	MFR	Total	Age Restricted	
Adena	BUILDING PERMITTING	Improvement Plan ARN 30495/309602	240	196	40	0	0	196	40	240
Falls of Ocala	BUILDING PERMITTING		289	0	0	115	0	174	0	174
Cherrywood Preserve	BUILDING PERMITTING		235	235	0	0	0	161	0	161
Ocala Crossings South	BUILDING PERMITTING		1,145	1,145	0	447	0	698	0	698
Calasa	BUILDING PERMITTING		5,000	3,282	3,600	941	54	2,341	3,546	5,887
Golden Ocala	BUILDING PERMITTING		2,399	0	0	249	0	2,648	0	2,648
Lake Diamond North	BUILDING PERMITTING		463	463	0	451	0	12	0	12
Freedom Commons	BUILDING PERMITTING		1,302	427	875	232	24	195	851	892
Ocala Preserve	BUILDING PERMITTING		1,800	1,800	0	1,302	0	498	0	498
Lake Bessola	BUILDING PERMITTING		13	13	0	0	0	13	0	13
Emerson Pointe	BUILDING PERMITTING		251	251	0	92	0	159	0	159
Marion Oaks (All)	BUILDING PERMITTING		28,861	0	0	12,051	135	0	0	16,675
Cedar Villas	BUILDING PERMITTING		34	0	34	0	0	0	34	34
Spruce Creek Preserve	COMPLETE		675	669	6	669	6	0	0	0
Westshire Phase 1	COMPLETE		230	0	230	0	230	0	0	0
WEC MHP	COMPLETE		41	41	0	41	0	0	0	0
Dak Hammock Preserve	COMPLETE		168	0	168	0	168	0	0	0
Point Grand Ocala South	COMPLETE	Major Site Plan Revision	576	0	600	0	584	0	0	0
Millwood Estates	COMPLETE		320	320	0	320	0	0	0	0
Summercrest	COMPLETE		700	0	0	700	0	0	0	0
Deer Path North Phase 2	COMPLETE		128	128	0	128	0	0	0	0
Spruce Creed Golf and Countryclub	COMPLETE		3,265	0	0	3,265	0	0	0	0
Stonecrest	COMPLETE		2,500	0	0	0	0	0	0	0
Dak Run	COMPLETE		3,488	3,488	0	0	0	0	0	0
St. James Park	COMPLETE		169	0	0	146	0	0	0	0
Ocala Palms	COMPLETE		1,218	0	0	1,218	0	0	0	0
Liberty Village	COMPLETE		251	251	0	251	0	0	0	0
WEC MPH 2	COMPLETE		27	27	0	27	0	0	0	0
Deeppath North	COMPLETE		120	120	0	120	0	0	0	0
SummerGlen	COMPLETE		985	0	0	985	0	0	0	0
Westshire Phase 2	COMPLETE		186	0	186	0	186	0	0	0
Graystone Hills	COMPLETE		248	248	0	248	0	0	0	0
Spines PUD	COMPLETE		300	0	300	0	300	0	0	0
Villages of Marion	COMPLETE		5,200	5,200	0	6,176	0	0	0	0
9494 Summerfield	DEVELOPMENT REVIEW		86	86	0	0	0	86	0	86
Florida Crossroads Commerce Park North	DEVELOPMENT REVIEW		800	400	400	0	0	400	400	800
Arden	DEVELOPMENT REVIEW		648	0	648	0	0	0	648	648
Whisper Woods	DEVELOPMENT REVIEW		82	82	0	0	0	82	0	82
C-25 Group	DEVELOPMENT REVIEW		174	174	0	0	0	174	0	174
Heritage Oaks	DEVELOPMENT REVIEW		159	159	0	0	0	159	0	159
Cypress Point	DEVELOPMENT REVIEW		621	0	0	0	0	621	0	621
Marco Polo	DEVELOPMENT REVIEW		320	0	0	0	0	320	0	320
Camilla Estates	DEVELOPMENT REVIEW		269	267	220	0	0	267	220	267
Villa Verde	DEVELOPMENT REVIEW		72	72	0	0	0	72	0	72
Bahia Villas	DEVELOPMENT REVIEW		192	0	192	0	0	0	192	192
Pointe at Silver Spring Townhomes		Major Site Plan ARN 29072	18	18	0	0	0	18	0	18
Midway Terrace Lot 17/18		Major Site Plan ARN 30147/30183	220	0	220	0	12	0	208	208
Patzwald Subdivision		Final Plat AR 28544	0	0	0	0	0	0	0	0
Mencia Residence, A Hamlet Subdivision		Final Plat ARN 30906	0	0	0	0	0	0	0	0
CHRON RESIDENCE HAMLET SUBDIVISION		Final Plat ARN 31910	0	0	0	0	0	0	0	0
HARMONY ESTATES		Final Plat ARN 32085	6	6	0	0	0	6	0	6
GREENWAY ESTATES		Improvement Plan ARN 31022	12	12	0	12	0	0	0	0
Marion Triplex		Minor Site Plan AR 31087	3	0	3	0	0	0	3	3
Saddlewood Oaks		Improvement Plan ARN 30179	44	44	0	0	0	44	0	44

**Maximum Units
Possible**

Bellevue	Dunnellon	McIntosh	Ocala	Reddick	Unincorp.	Total
1,579	<i>See Unic.</i>	<i>See Unic.</i>	16,790	<i>See Unic.</i>	47,583	65,952

COUNTYWIDE Approved Development



Remaining Units

- 1 - 10
- 11 - 100
- 101 - 250
- 251 - 1,000
- 1,001 - 3,000
- 3,001 - 5,000
- 5,001 - 22,750

PUDs

What it is.

- Residential units with an issued/active building permit

Why it matters.

- Best indicator of imminent growth and near-term enrollment pressure

What's considered.

- Issued and active residential building permits
- Exclude inactive, withdrawn, completed, nonresidential

How it's analyzed.

- Collect active residential building permits from each jurisdiction.
- Include only permits that remain active and have not received a certificate of occupancy.
- Exclude withdrawn, expired, or completed permits.
- Categorize permits by housing type.

Why it's done.

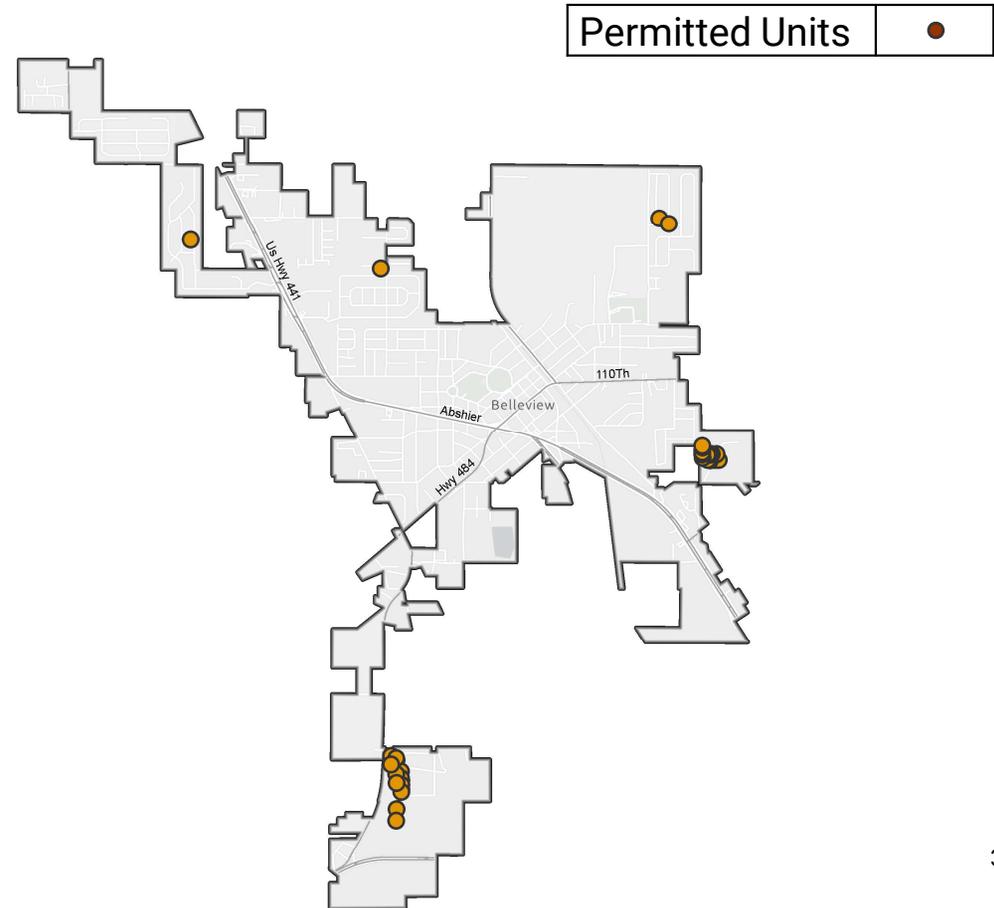
- Identify units expected to deliver in the short term.
- Provide the strongest indicator of imminent residential growth.
- Identify locations where near-term enrollment increases are likely.



Active Residential Building Permits

Bellevue

Housing Type	Total Residential Bldg. Permits	Active Residential Bldg. Permits	Units to be Developed
SFR	588	35	35
MFR	5	0	0
MH	40	1	1
Total	633	36	36



Data as of September 2025

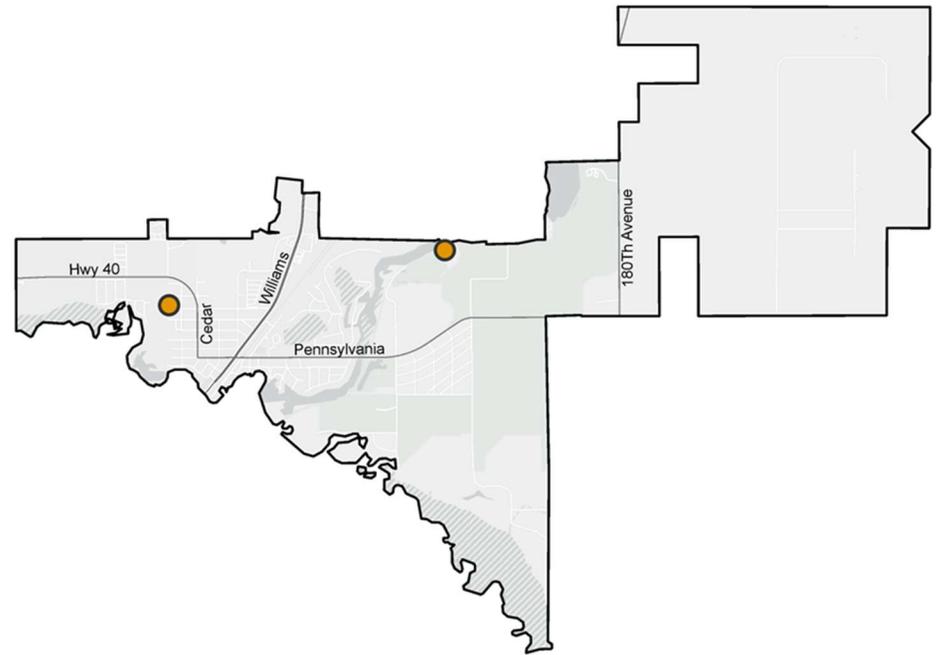


Active Residential Building Permits

Dunnellon

Permitted Units 

Housing Type	Total Residential Bldg. Permits	Active Residential Bldg. Permits	Units to be Developed
SFR	84	2	2
MFR	0	0	0
MH	3	0	0
Total	87	2	2



38

Data as of September 2025

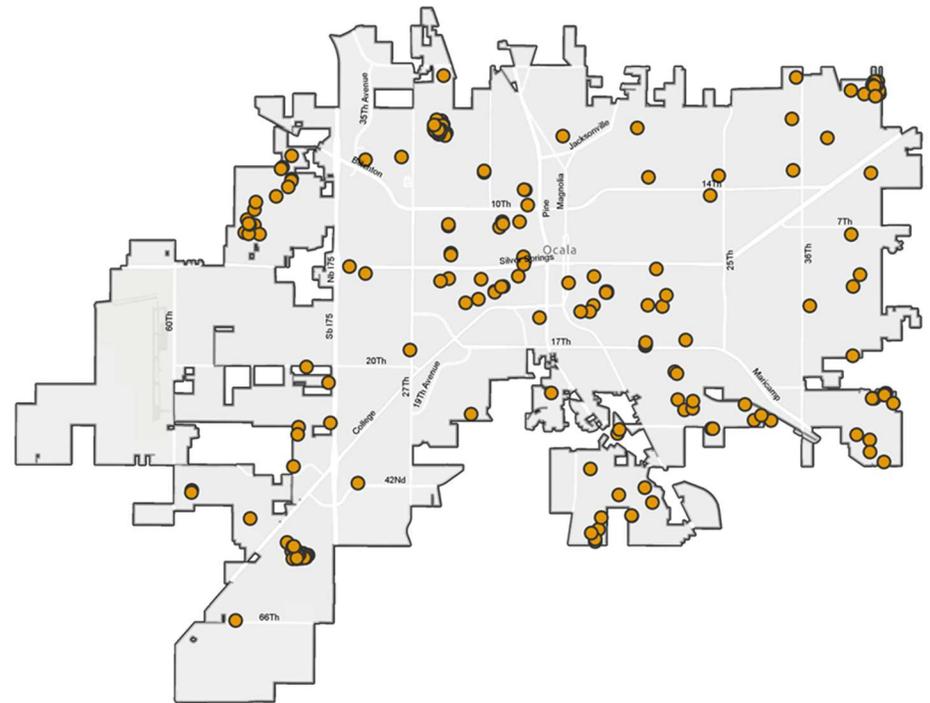


Active Residential Building Permits

Ocala

Permitted Units ●

Housing Type	Total Residential Bldg. Permits	Active Residential Bldg. Permits	Units to be Developed
SFR	2,029	223	223
MFR	204	49	1,231
MH	111	17	17
Total	2,344	289	1,471



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Data as of September 2025

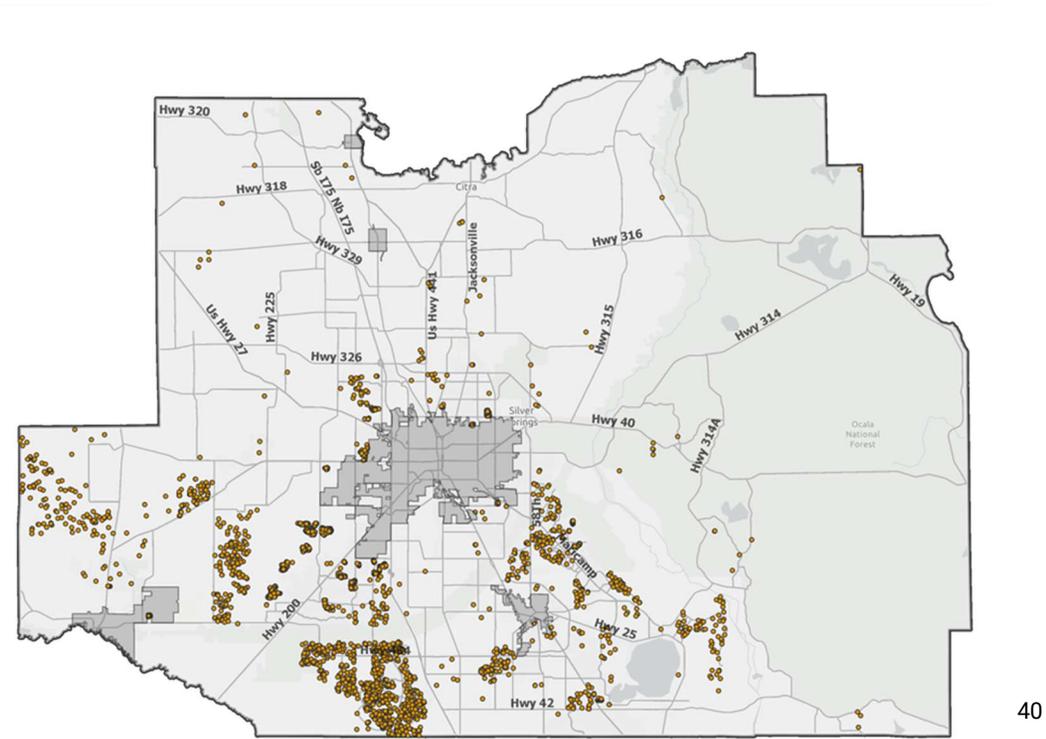


Active Residential Building Permits

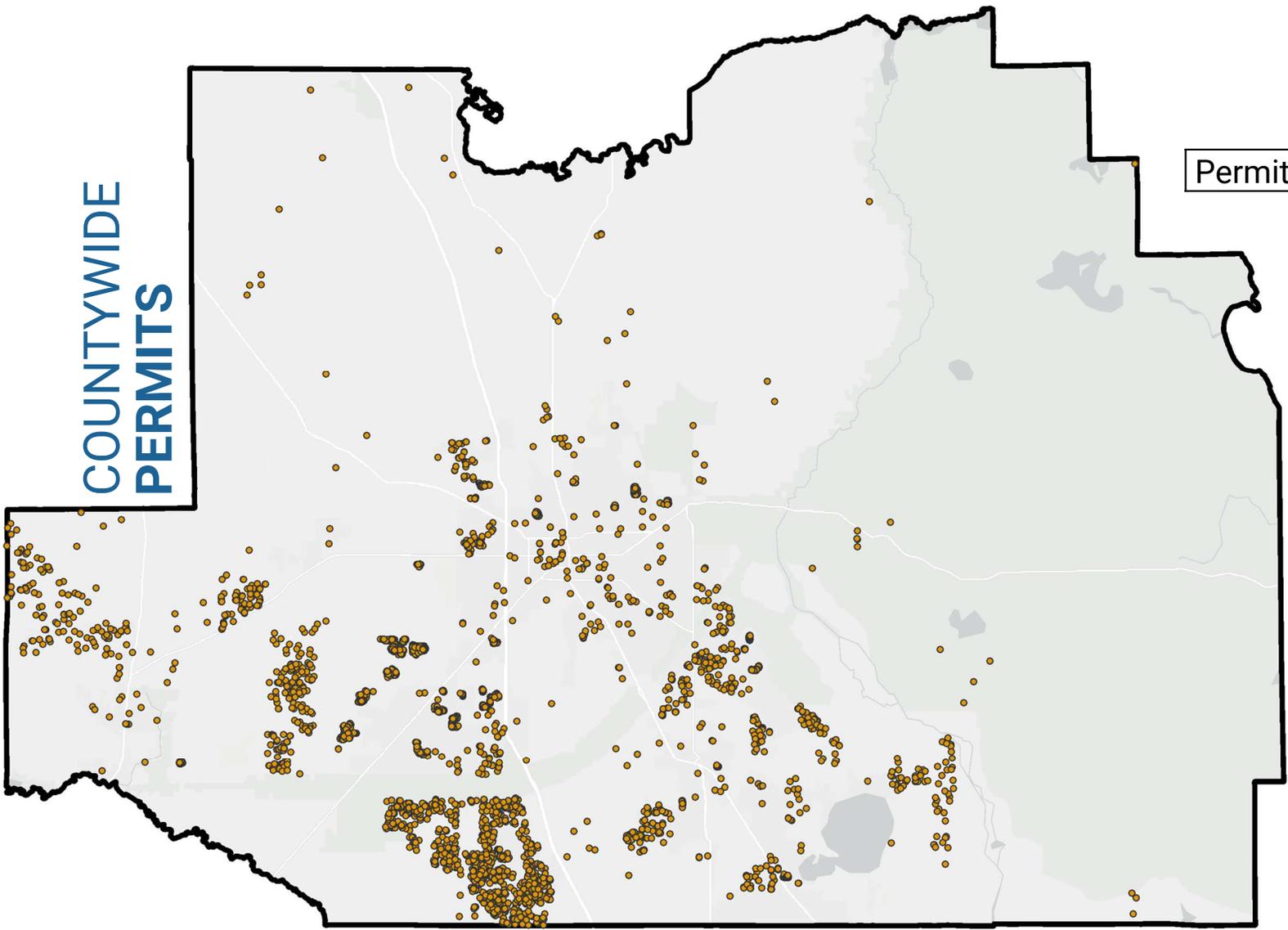
Marion County (Unincorporated)

Permitted Units ●

Housing Type	Total Residential Bldg. Permits	Active Residential Bldg. Permits	Units to be Developed
SFR	69,430	4,341	4,341
MFR	843	205	2,938
MH	8,671	19	19
Total	78,944	4,565	7,298



Data as of September 2025



**COUNTYWIDE
PERMITS**

Permitted Units ●

	Bellevue	Dunnellon	McIntosh	Ocala	Reddick	Unincorp.	Total
Active Permitted Units	36	2	<i>See Unic.</i>	1,471	<i>See Unic.</i>	7,298	8,807

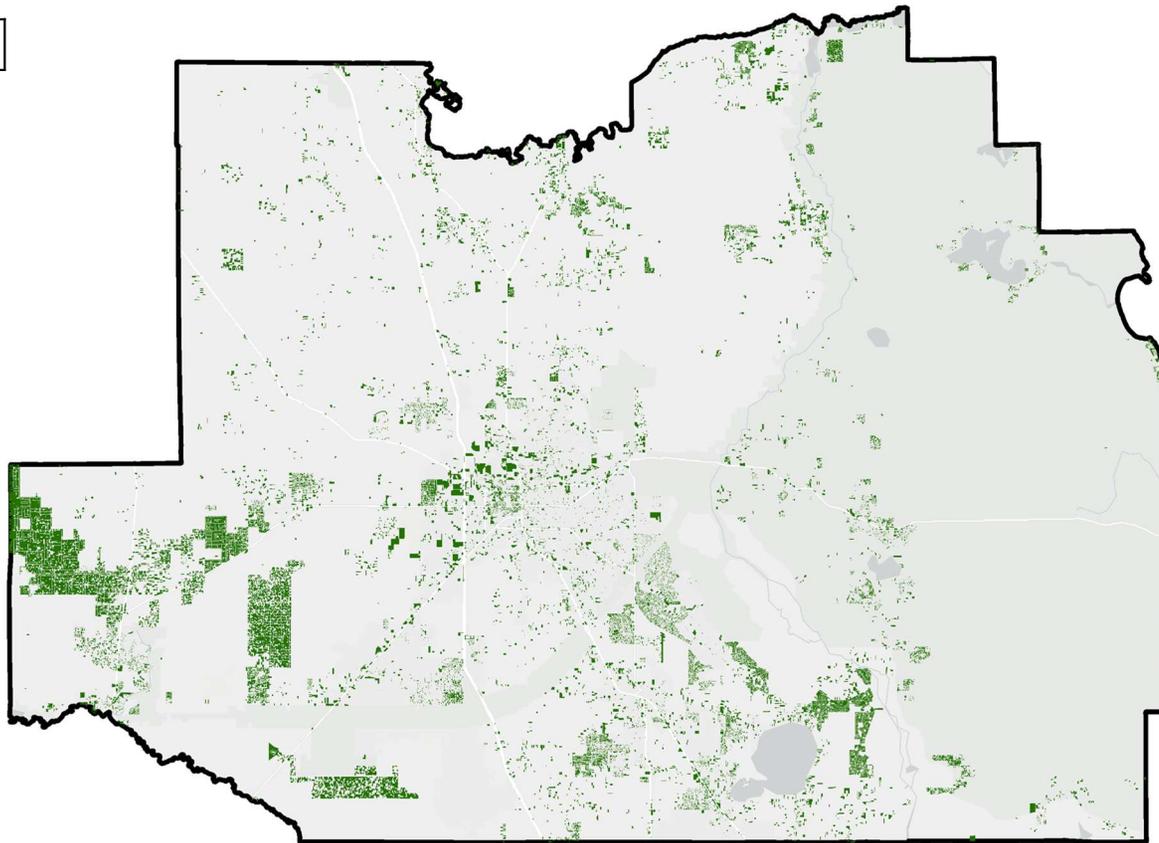
SECTION 03

Data Assessment Methodology

Base Data Application

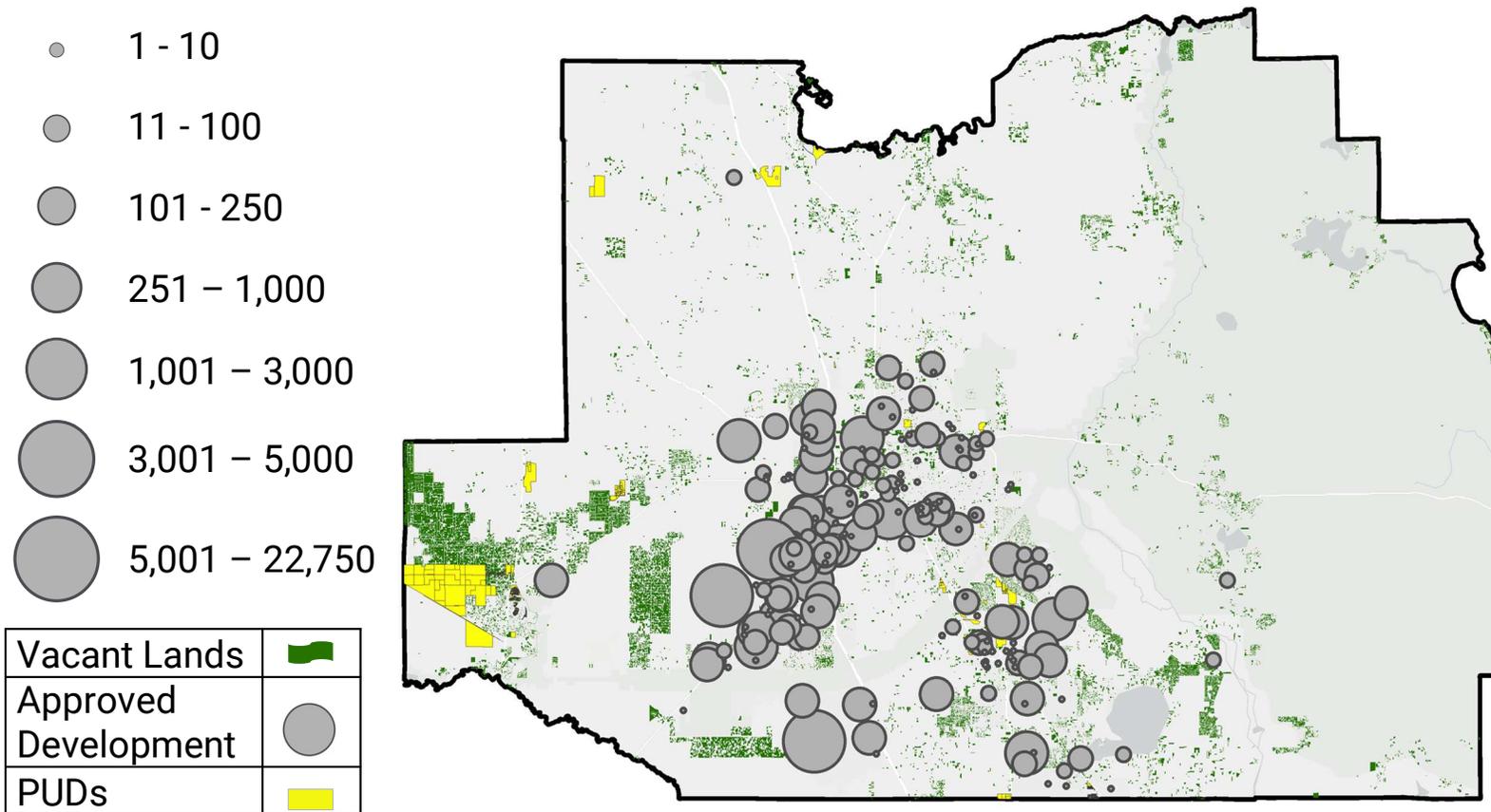
Vacant Land

Vacant Lands 



Base Data Application

Vacant Land, Approved Development, PUDs



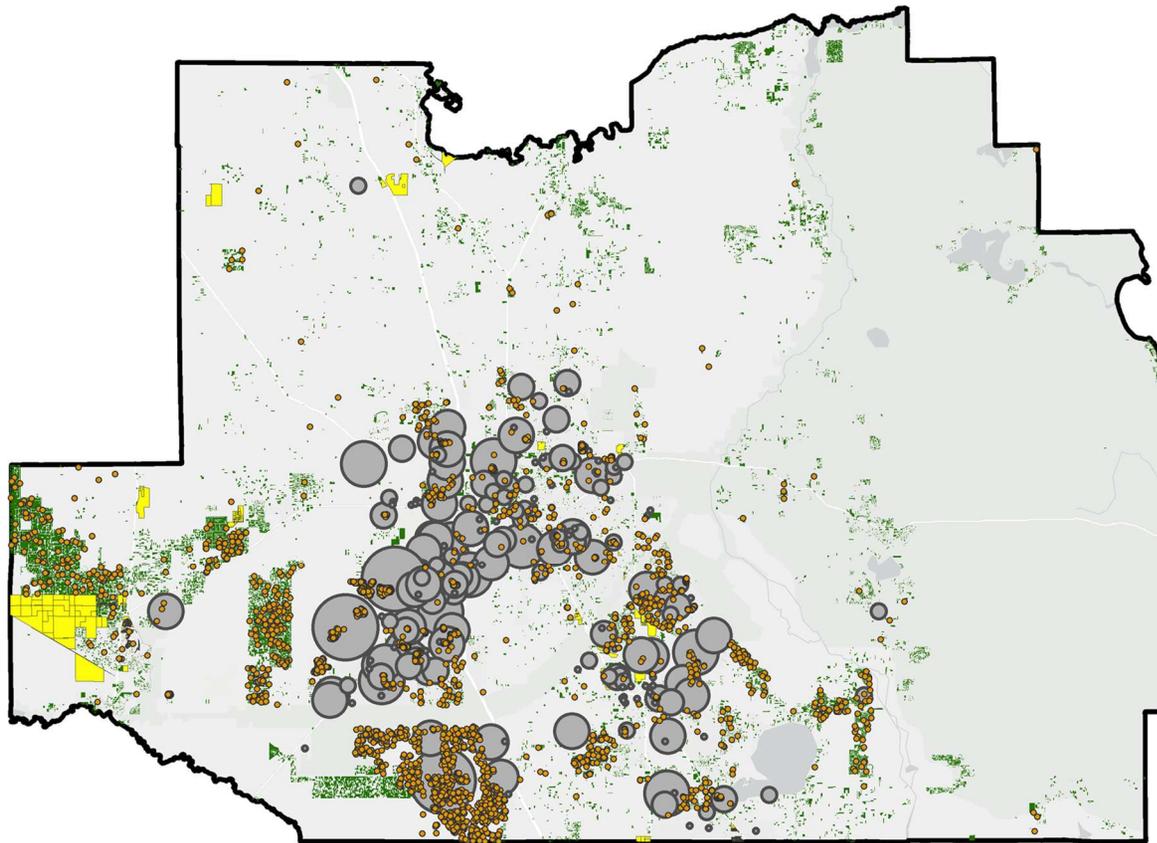


Base Data Application

Vacant Land, Approved Development, PUDs, Permits

- 1 - 10
- 11 - 100
- 101 - 250
- 251 - 1,000
- 1,001 - 3,000
- 3,001 - 5,000
- 5,001 - 22,750

Vacant Lands	
Approved Development	
Permitted Units	
PUDs	

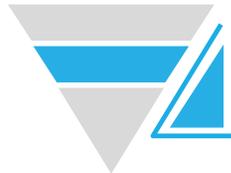




Base Data Application

Current Residential Summary

Housing Type	Current Capacity
Single Family	139,348
Multi-Family	22,058
Mobile Home	28,221
Total	189,627



Current Capacity

Current Capacity Summary

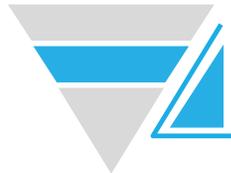
School Level	Current (SY 25/26) Enrollment	Current District Capacity	Current District Percent Capacity
Elementary	21,501	23,253	90%
Middle	9,938	11,622	82%
High	13,529	13,247	100%
Total	44,968	48,122	93%



Current Capacity

Elementary School Current Capacity

School	Current Capacity	School	Current Capacity
Anthony Elementary	74%	Emerald Shores Elementary	92%
Belleview-Santos Elementary	85%	Fessenden Elementary	98%
Belleview Elementary	94%	Fort Mccoy Elementary	73%
College Park Elementary	105%	Greenway Elementary	88%
Dr N H Jones Elementary	100%	Hammett Bowen Jr. Elementary	94%
Dunnellon Elementary	113%	Harbour View Elementary	97%
East Marion Elementary	86%	Legacy Elementary	84%
Eighth Street Elementary	97%	Maplewood Elementary	102%



Current Capacity

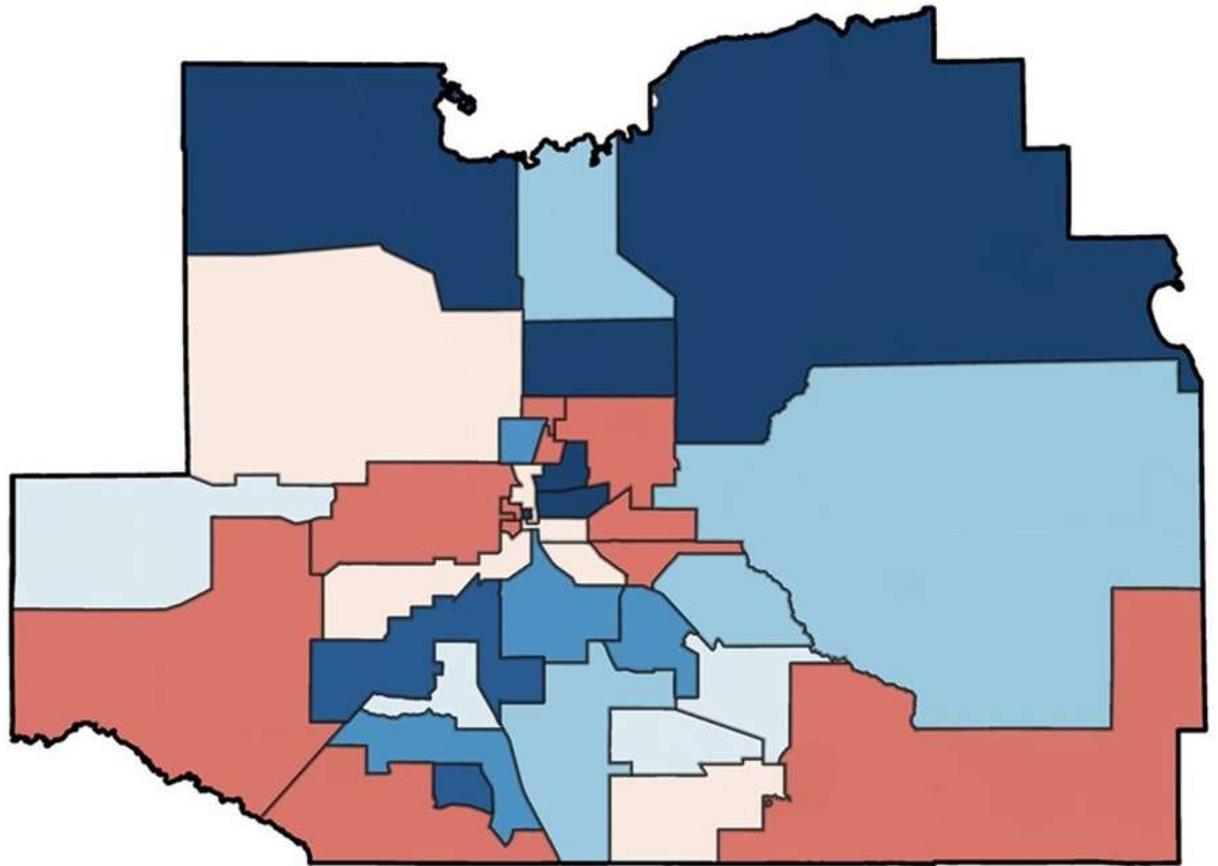
Elementary School Current Capacity (continued)

School	Current Capacity	School	Current Capacity
Marion Oaks Elementary	85%	South Ocala Elementary	95%
Oakcrest Elementary	63%	Sparr Elementary	102%
Ocala Springs Elementary	119%	Stanton-Weirsdale Elementary	102%
Reddick-Collier Elementary	48%	Sunrise Elementary	76%
Romeo Elementary	92%	Ward-Highlands Elementary	103%
Ross Prairie Elementary	103%	Winding Oaks Elementary	75%
Saddlewood Elementary	96%	Wyomina Park Elementary	73%
Shady Hill Elementary	83%	Elementary School Zone Total	90%

Current Capacity

Elementary Attendance Zones, Capacity Utilization, Current Conditions

>70%	Dark Blue
70 - 75%	Dark Blue
75 - 80%	Dark Blue
80 - 85%	Medium Blue
85 - 90%	Light Blue
90 - 95%	Very Light Blue
95 - 100%	Light Orange
100% - 125%	Red
125% - 150%	Dark Red

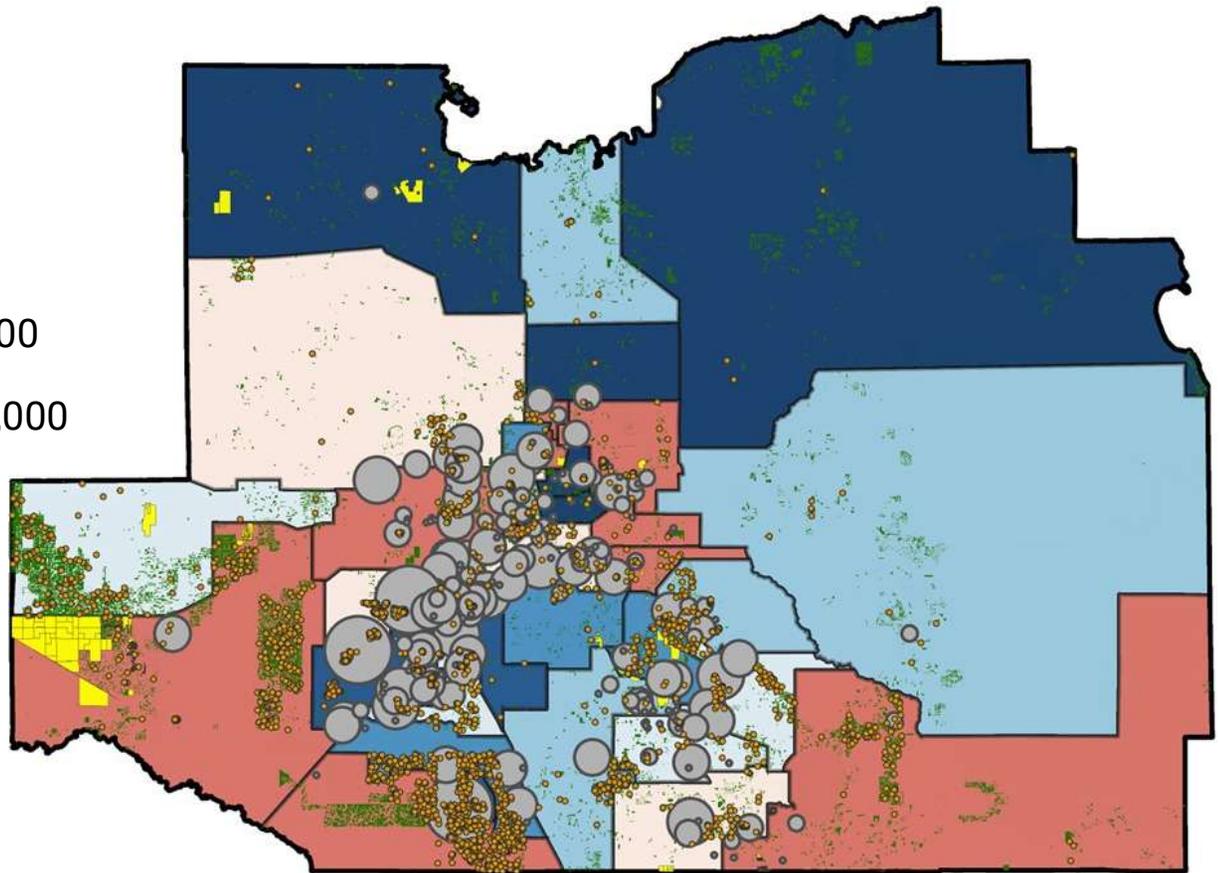


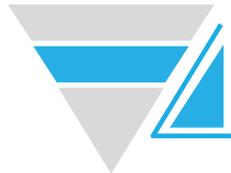
Current Capacity

Elementary Attendance Zones, Capacity Utilization with Development Pressure, Vacant + Approved + Permits + PUDs

>70%	
70 - 75%	
75 - 80%	
80 - 85%	
85 - 90%	
90 - 95%	
95 - 100%	
100% - 125%	
125% - 150%	
Vacant Lands	
Approved Development	
Permitted Units	
PUDs	

-  1 - 10
-  11 - 100
-  101 - 250
-  251 - 1,000
-  1,001 - 3,000
-  3,001 - 5,000
-  5,001 - 22,750





Current Capacity

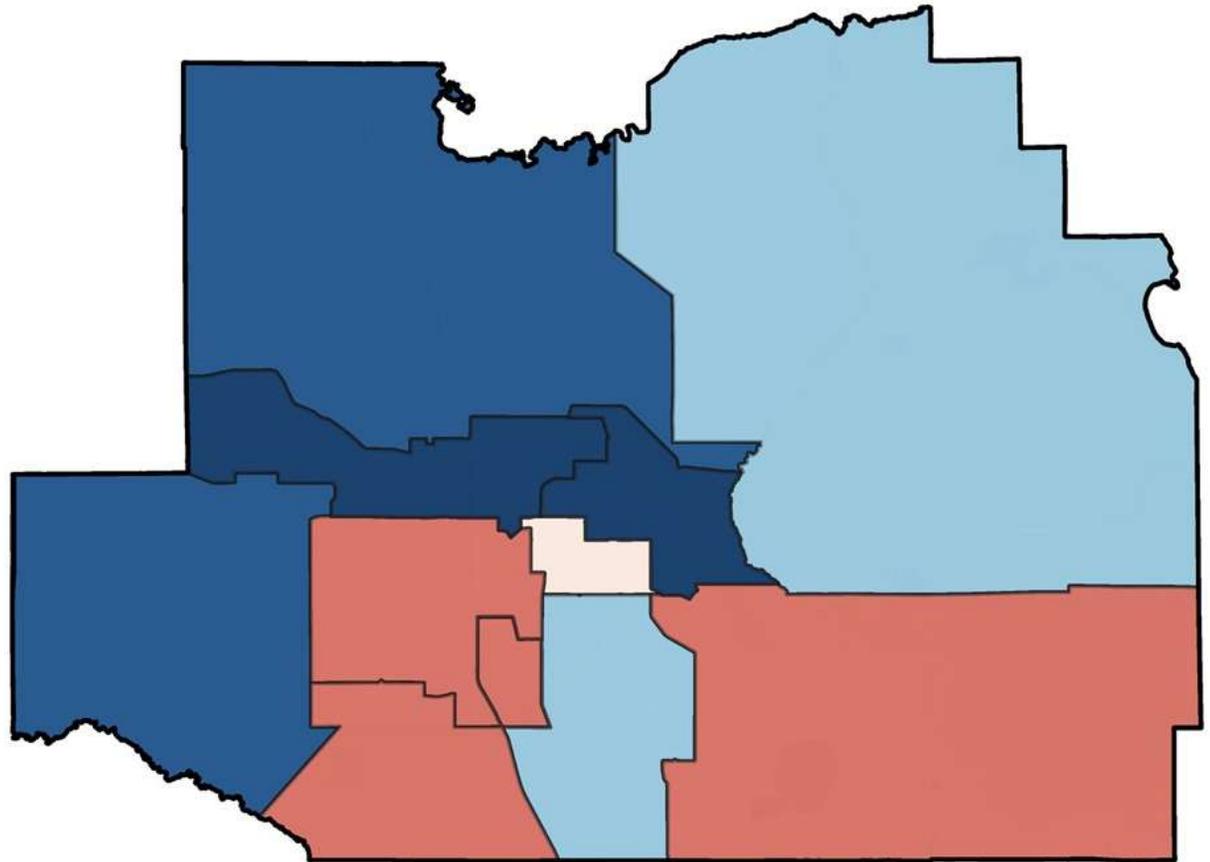
Middle School Current Capacity

School	Current Capacity	School	Current Capacity
Belleview Middle	103%	Lake Weir Middle	88%
Dunnellon Middle	71%	Liberty Middle	70%
Fort Mccoy School	60%	North Marion Middle	70%
Ft. King Middle	71%	Osceola Middle	90%
Horizon Academy At Marion Oaks	102%		
Howard Middle	79%	Middle School Zone Total	82%

Current Capacity

Middle Attendance Zones, Capacity Utilization, Current Conditions

>70%	Dark Blue
70 - 75%	Dark Blue
75 - 80%	Dark Blue
80 - 85%	Medium Blue
85 - 90%	Light Blue
90 - 95%	Very Light Blue
95 - 100%	Light Orange
100% - 125%	Red
125% - 150%	Dark Red

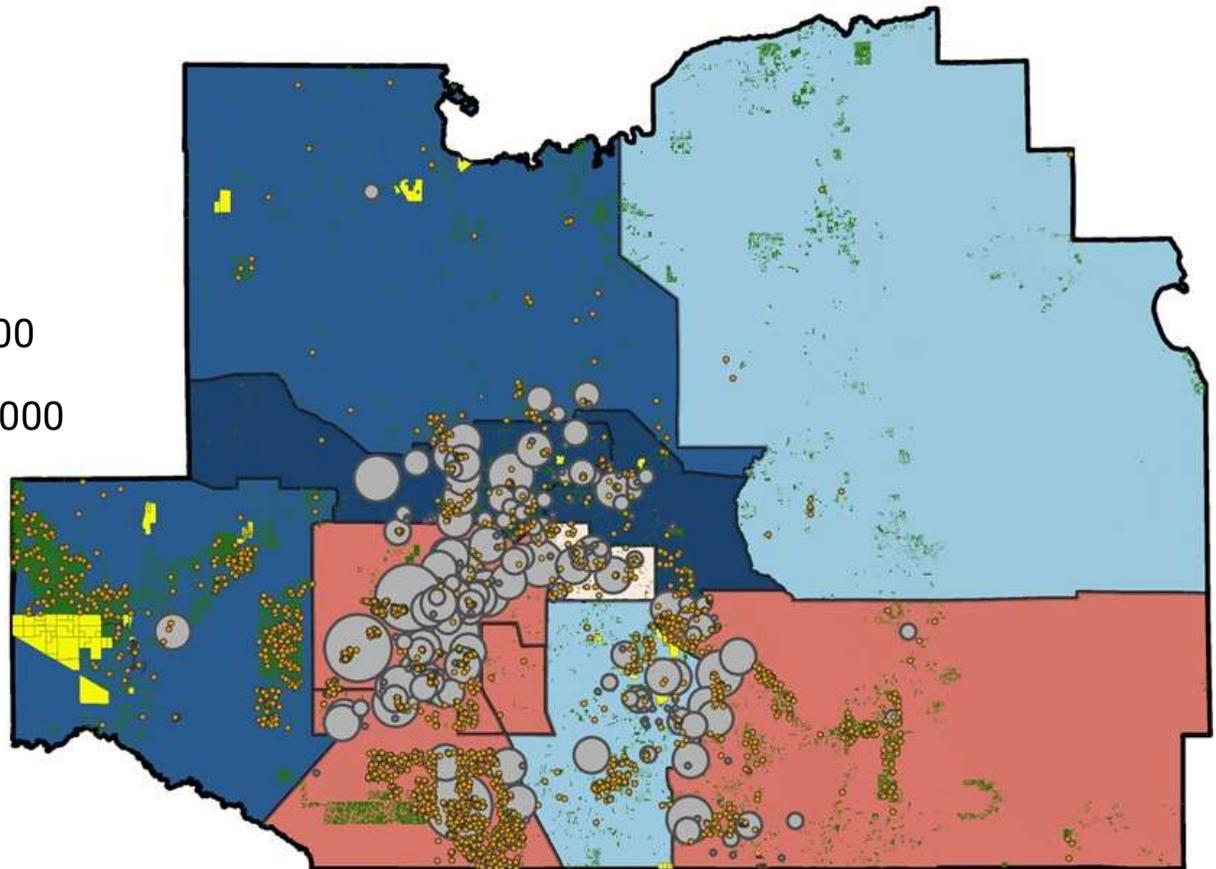


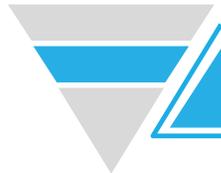
Current Capacity

Middle Attendance Zones, Capacity Utilization with Development Pressure, Vacant + Approved + Permits + PUDs

>70%	
70 - 75%	
75 - 80%	
80 - 85%	
85 - 90%	
90 - 95%	
95 - 100%	
100% - 125%	
125% - 150%	
Vacant Lands	
Approved Development	
Permitted Units	
PUDs	

-  1 - 10
-  11 - 100
-  101 - 250
-  251 - 1,000
-  1,001 - 3,000
-  3,001 - 5,000
-  5,001 - 22,750





Current Capacity

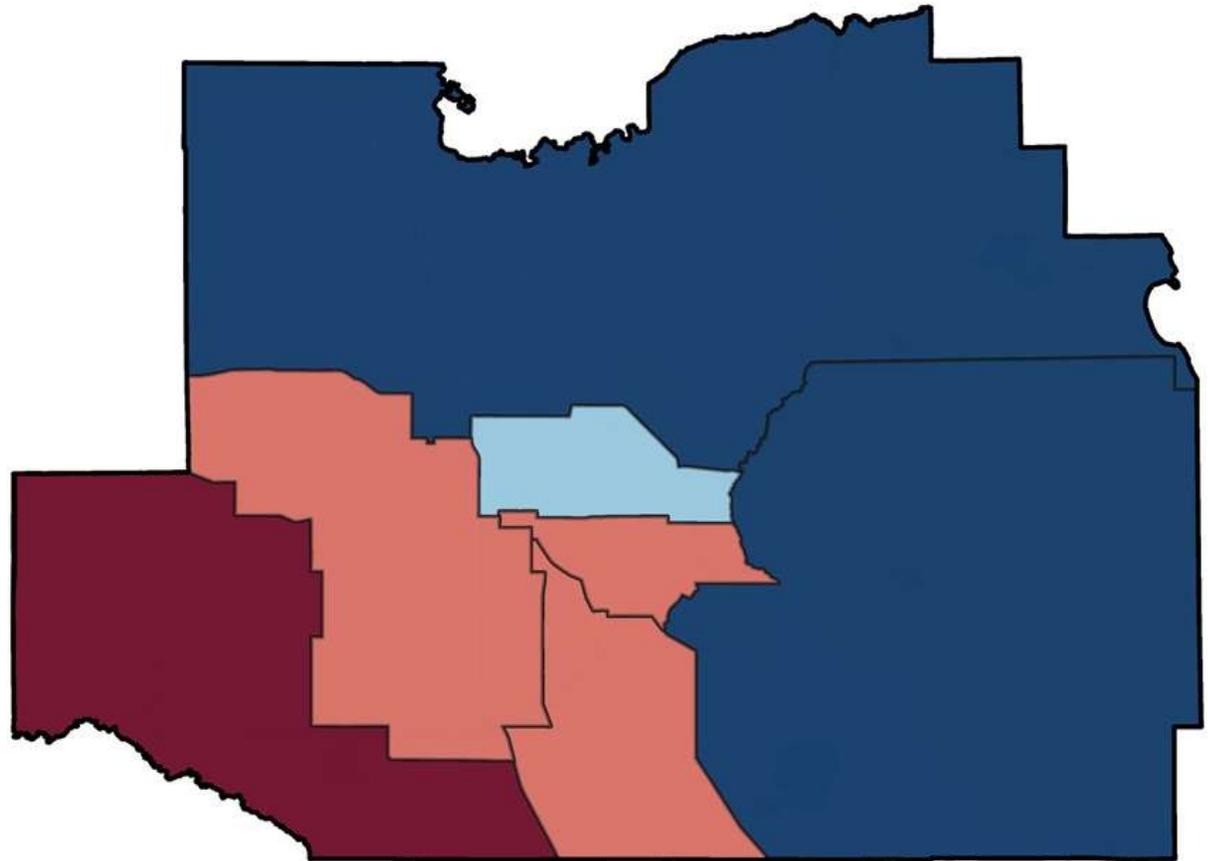
High School Current Capacity

School	Current Capacity	School	Current Capacity
Belleview High	112%	North Marion High	70%
Dunnellon High	148%	Vanguard High	88%
Forest High	102%	West Port High	120%
South Marion High	-		
Lake Weir High	73%	High School Zone Total	100%

Current Capacity

High Attendance Zones, Capacity Utilization, Current Conditions

>70%	Dark Blue
70 - 75%	Dark Blue
75 - 80%	Medium Blue
80 - 85%	Light Blue
85 - 90%	Light Blue
90 - 95%	Light Blue
95 - 100%	Light Orange
100% - 125%	Red-Orange
125% - 150%	Dark Red

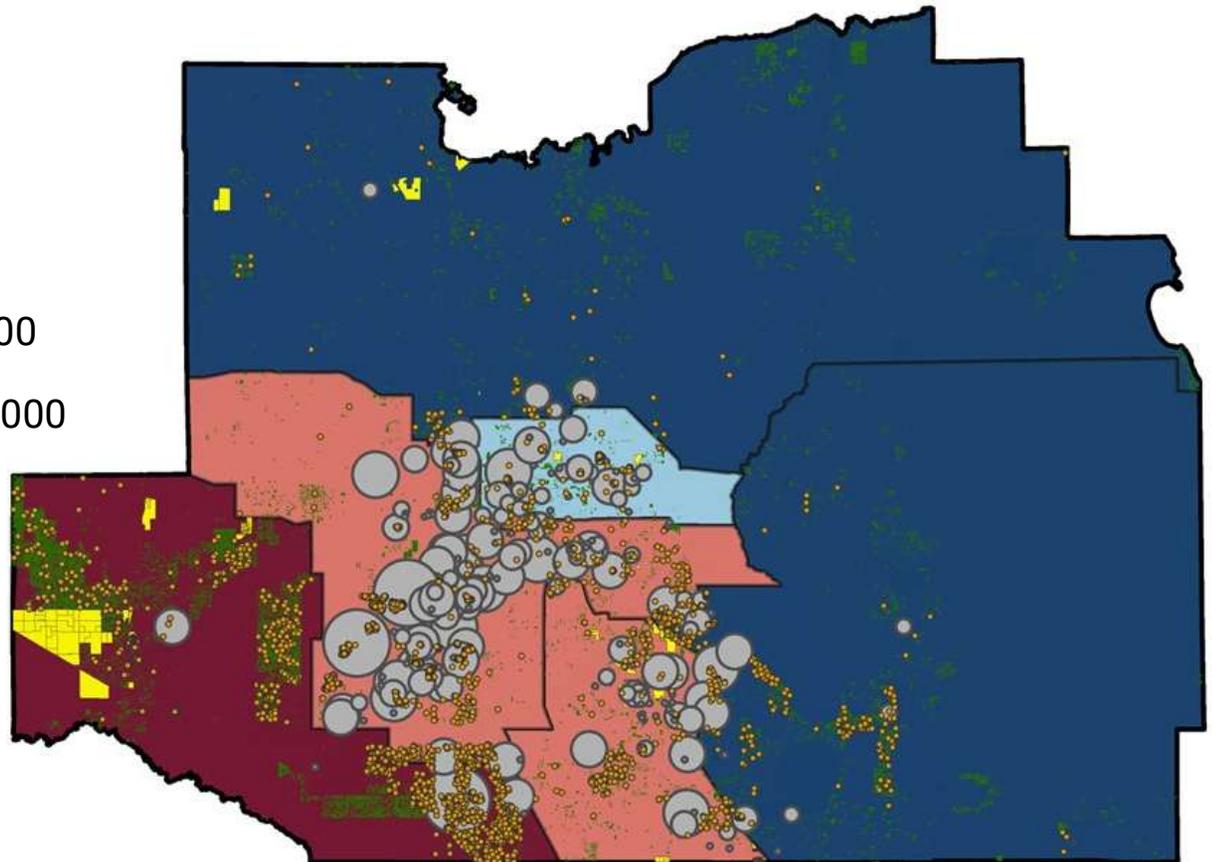


Current Capacity

High Attendance Zones, Capacity Utilization with Development Pressure, Vacant + Approved + Permits + PUDs

>70%	
70 - 75%	
75 - 80%	
80 - 85%	
85 - 90%	
90 - 95%	
95 - 100%	
100% - 125%	
125% - 150%	
Vacant Lands	
Approved Development	
Permitted Units	
PUDs	

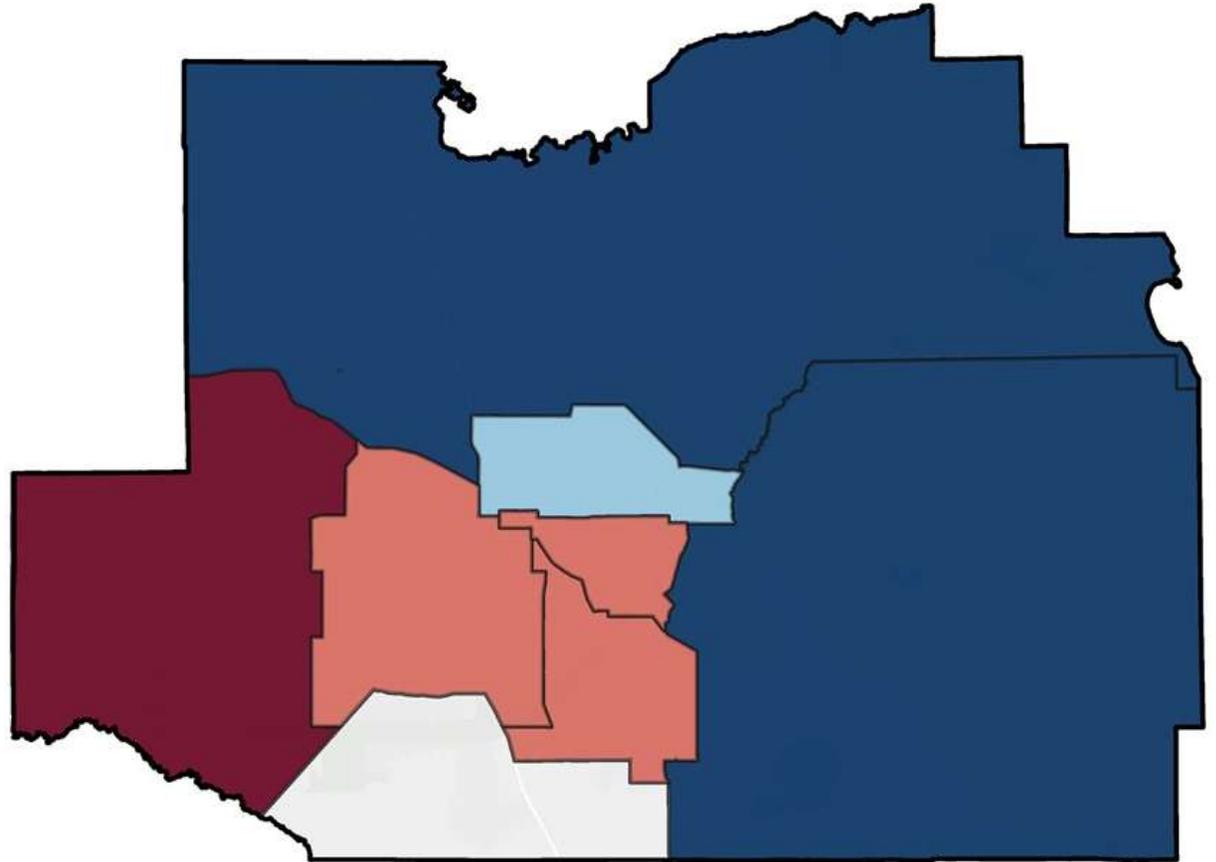
-  1 - 10
-  11 - 100
-  101 - 250
-  251 - 1,000
-  1,001 - 3,000
-  3,001 - 5,000
-  5,001 - 22,750



Current Capacity

South Marion High Attendance Zones, Capacity Utilization, Current Conditions

>70%	Dark Blue
70 - 75%	Dark Blue
75 - 80%	Dark Blue
80 - 85%	Medium Blue
85 - 90%	Light Blue
90 - 95%	Very Light Blue
95 - 100%	Light Orange
100% - 125%	Red-Orange
125% - 150%	Dark Red

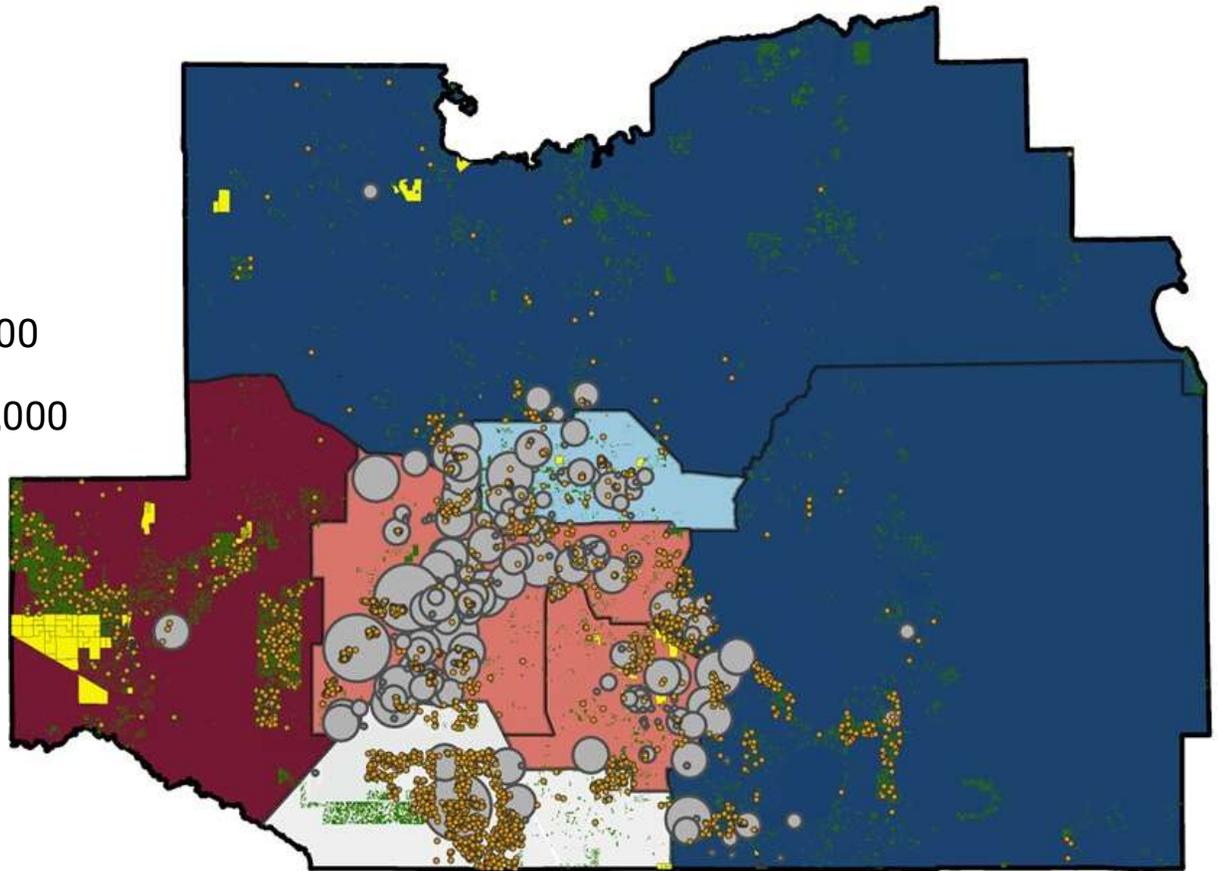


Current Capacity

South Marion High Attendance Zones, Capacity Utilization with Development Pressure, Vacant + Approved + Permits + PUDs

>70%	
70 - 75%	
75 - 80%	
80 - 85%	
85 - 90%	
90 - 95%	
95 - 100%	
100% - 125%	
125% - 150%	
Vacant Lands	
Approved Development	
Permitted Units	
PUDs	

-  1 - 10
-  11 - 100
-  101 - 250
-  251 - 1,000
-  1,001 - 3,000
-  3,001 - 5,000
-  5,001 - 22,750





School Data Assessment

Student Generation Rate

School Year 2022/23				
	Single Family	Multi-Family	Mobile Homes	All Housing
<i>Elementary School</i>	0.100	0.137	0.115	0.107
<i>Middle School</i>	0.049	0.055	0.056	0.051
<i>High School</i>	0.076	0.066	0.067	0.073
Countywide	0.225	0.258	0.238	0.231

Benesch & MCPS Long Range School Planning Study, 2023



School Data Assessment

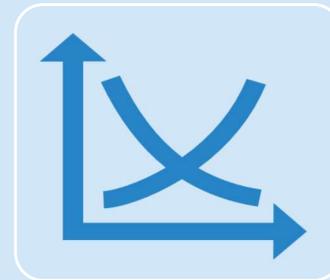
Unpredictable Projections



Step declines
in brick-and-
mortar public
schools since
2022



Family
Empowerment
Scholarships
more than
doubled during
the same
period



Declines
despite Florida
doubling the
national
average for
population
growth



School Data Assessment

Unpredictable Projections

- Florida expanded state-funded K-12 scholarships for all students on March 27, 2023 (HB 1).
- More students move between district schools, charter schools, private schools, and home education from year to year.
- Standard projection methods rely on stable links between new housing and district enrollment.
- Decision to present current conditions only. Projections stay internal until post-2023 patterns stabilize.

Check-in & Discussion



THANK YOU

Tentative Education Facilities Plan

April 1, 2026

Public Schools Planning Officials



*in partnership
with*



Backup (A). Data Vintage

	Bellevue	Dunnellon	McIntosh	Ocala	Reddick	Unincorporated
<u>Stage 1.</u> <i>Future Land Use</i>	As of April 2025	As of April 2025	As of September 2025	As of April 2025	As of April 2025	As of April 2025
<u>Stage 2.</u> <i>Development Approvals</i>	As of September 2025	N/A	N/A	Between May 2021 and May 2025	N/A	Between Jan 2024 and June 2025
<u>Stage 3.</u> <i>Permitting</i>	As of September 2025	Between October 2015 and June 2025	Between January 2000 and June 2025	Between October 2015 and June 2025	Between January 2000 and June 2025	Between January 2000 and June 2025

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Effective Date: _____

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THIS FOURTH AMENDED AND RESTATED INTERLOCAL AGREEMENT FOR MARION COUNTY PUBLIC SCHOOL FACILITY PLANNING is entered into this ____ day of _____, 202~~65~~, and is effective as of _____, 202~~65~~ (the "Effective Date"), by and between the School Board of Marion County, Florida (hereinafter referred to as "School Board"), and 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"). The Local Governments and School Board shall hereinafter be individually referred to as "Party" and collectively referred to as "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

WHEREAS, in 2011, the Local Governments and the School Board had a general consensus to

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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~~Fourth 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:

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.

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~~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.~~

1.34. **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.

1.45. **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.

1.56. **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.

1.67. **Comprehensive Plan:** A plan that meets the requirements of Sections 163.3177 F.S.

1.78. **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.

1.89. **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 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.

1.940. **Development Approval:** An approval of a site plan, final subdivision, or functional equivalent issued by a Local Government.

1.104. **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.

1.112. **Educational Facilities Plan:** The School Board's annual capital planning document for needs over 5-year, 10-year, and 20-year periods.

1.112.1. **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

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contains the educational plant survey.

1.112.2. **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.

1.123. **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.

1.134. **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.

1.145. **Elementary School:** A school that offers more of kindergarten through grade 4 than grades 5 through 8 and no grades 9 through 12.

1.156. **Enrollment or Membership:** The number of students (Pre-K to 12) enrolled in the Florida public school system based on the 12Qth instructional day.

1.167. **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.

1.178. **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.

1.189. **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).

1.1920. **FISH Permanent Capacity:** The number of students that can be housed in the

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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.

1.201. 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.

1.212. High School: A school that offers more of grades 9 through 12 than grades 5 through 8 and no kindergarten through grade 4.

1.223. 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.

1.234. Local Governments: Marion County and its Municipalities.

1.245. 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.

1.256. Municipalities: All cities and town in Marion County.

1.267. 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.

1.278. 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.

1.289. 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.

1.2930. 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

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agreement and is required to hold a Joint Planning Workshop at least once a year.

1.304. **Residential Development:** Any development comprised of dwelling units, in whole or in part, for permanent human habitation.

1.312. **Redistricting:** Any change to an Attendance Zone boundary.

1.323. **Satisfactory Permanent Student Stations:** The number of student stations in permanent structures (buildings) identified as being satisfactory in the FDOE FISH Inventory.

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

1.345. **School Board:** The governing body established under Article IX, Section 4, Florida Constitution.

1.356. **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:

- 1.356.1. **Satisfactory Permanent Student Stations;**
- 1.356.2. **FISH Permanent Capacity;**
- 1.356.3. **FISH Total Capacity;**
- 1.356.4. **Program Capacity; and**
- 1.356.5. **Combination School Capacity.**

1.367. **School District:** The School District of Marion County is created pursuant to Article IX, Section 4 of the Florida Constitution.

1.378. **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.

1.389. **Student Station:** A satisfactory space within a building or structure designated in FISH can accommodate a student for an instructional program.

- 1.3940. **School Type:** There are five (5) types of school:
- 1.3940.1. **Elementary School;**
 - 1.3940.2. **Middle School;**
 - 1.3940.3. **High School;**
 - 1.3940.4. **Combination School; and**
 - 1.3940.5. **Other schools.**

1.40. **Student Generation Rate:** average number of students who enroll for a zoned school when one housing unit is constructed

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1.41. **Superintendent:** The District School Superintendent of Marion County.

1.42. **Superintendent's Designee or Designee:** That person(s) responsible for dispatching responsibilities identified in the Interlocal Agreement which have been attributed to the Superintendent or 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.

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~~ school 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. The first TWG meeting will occur in November-December and the second TWG meeting will occur in January-February. 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. An expected annual timeline is included in ~~standard~~ TWG agenda is included as Exhibit Appendix 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 of each school year, 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

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and, to the maximum extent possible, by ~~Traffic Analysis Zone (TAZ)~~-school zone. 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 increases due to renovations or expansions, and lost School Capacity due to closures.

At the first meeting of each ~~calendar~~-school 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 ~~between March and May~~ the first quarter of each ~~calendar~~-school 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 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.

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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 an analysis of development data and October FTE 40-day counts~~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 FLUM amendments, rezoning applications including PUDs, and approved development (site plans, preliminary plats, concept plans)~~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. Data sharing guidelines are summarized in Appendix B.

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 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.

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4.3. Adopted Educational Facilities Plan (~~A~~EF~~P~~DEF). Annually and in conformance with Section 1013.35(4), F.S., the School Board shall consider and adopt the TEF. Upon giving proper notice to the public and Local Governments and opportunity for public comment, the School Board may amend the TEF 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 AEF within 30 ~~calendar~~ school 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 1st of each year, Annually,~~ 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~~

4.5.23. approved subdivision plats and multi-family residential site plans.

4.5.3. Building Permit and Certificate of Occupancy issuance by the number of bedrooms will be shared as data is collected on a regular basis.

4.6. No later than ~~No later than June 30~~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.

4.8. Development Review Checklist: The School Board will work with each jurisdiction that is updated annually through the TWG.

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 the PSPO, the School Board staff will develop a list of potential sites in the area of need and submit that

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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 5.3 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 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

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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 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, REZONINGS 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

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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 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.

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9.2. The procedure set forth herein shall apply when adopting or amending the Adopted 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.

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.

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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 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,

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FOR MARION COUNTY PUBLIC SCHOOL
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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

SECTION 16: EFFECTIVE DATE.

16.1. The effective date of this Agreement shall be , 202~~63~~.

IN WITNESS WHEREOF, this Interlocal Agreement has been executed by the Board of County Commissioners of Marion County, Florida this ____ day of _____, 202~~65~~.

Appendix A: Timeline

<u>Timeline</u>	<u>Deadline</u>
<u>August</u>	<u>School year begins no earlier than August 10th</u>
<u>September</u>	<u>Development data due September 30th</u>
<u>October</u>	<u>40-Day FTE Count published</u>
<u>November- December</u>	<u>TWG meeting to discuss preliminary observations in development and student enrollment data</u>
<u>January- February</u>	<u>TWG meeting to review data and analysis findings</u>
<u>March</u>	<u>Final report due to TWG for review</u>
<u>March- May</u>	<u>PSPO meeting</u>

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Appendix B: Data Source Citations

<u>Dataset Name</u>	<u>Source</u>
<u>Residential Building Permit Records</u>	<u>Unincorporated Marion County, Ocala, Belleview, Reddick, McIntosh, and Dunnellon</u>
<u>Certificate of Occupancy Records</u>	<u>Unincorporated Marion County, Ocala, Belleview, Reddick, McIntosh, and Dunnellon</u>
<u>Approved Residential Development</u>	<u>Unincorporated Marion County, Ocala, Belleview, Reddick, McIntosh, and Dunnellon</u>
<u>Zoning</u>	<u>Unincorporated Marion County, Ocala, Belleview, Dunnellon, McIntosh, and Reddick</u>
<u>Future Land Use</u>	<u>Unincorporated Marion County, Ocala, Belleview, Dunnellon, McIntosh, and Reddick</u>
<u>Parcels/Existing Development</u>	<u>Property Appraiser</u>
<u>E911 Addresses</u>	<u>911 Management Department</u>



**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

DRAFT

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

