



FISH and Educational Plant Survey and Validation: Vital Components of Comprehensive Capital Outlay Planning

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FLORIDA DEPARTMENT OF
EDUCATION
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Goals of a Comprehensive Capital Outlay Plan

- Meeting the Facility Needs of Students
 - Safe
 - Secure
 - Educationally Adequate
 - Equitable
- Safeguarding Tax Payer Resources
 - Facilities are Necessary
 - Costs are Reasonable
 - Process is Transparent

TOOLS for Capital Outlay Planning

Estimating Conferences

District Budget

5-Year Work Plan

Fla. Inventory of School Houses (FISH)

Survey

Estimating Conferences

- Official Capital Outlay Full-Time Equivalent (COFTE) projections are established
- 1013.35(1)(a)1. - must use these COFTE projections to determine facility space needs

Capital Outlay Full-Time Equivalent (COFTE)

District COFTE includes:

- Students instructed in a public school facility
- Surveys 2 and 3
- Conversion Charter Schools

Capital Outlay Full-Time Equivalent (COFTE)

District COFTE does NOT include:

- Students in Traditional Charter School
- Hospital/Homebound
- McKay Scholarships
- DJJ Students
- Florida Virtual School Students (unless...)
- Students at Ancillary offices, like Superintendent's office

District Capital Outlay Budget (1013.61, F.S.)

- Each Board shall annually adopt a C.O. budget
- C.O. Budget “...shall be based upon and in harmony with the board’s capital outlay plan.”
- C.O. Budget “shall designate the proposed capital outlay expenditures by project for the year from all fund sources.”
- “The Board may not expend any funds on any project not included in the budget, as amended.”
- “Each district school board must prepare its tentative district educational facilities plan as required by s. 1013.35 before adopting the capital outlay budget.”

Educational Facilities Plan (s. 1013.35, F.S.)

- Includes
 - Educational Plant Survey
 - Inventory (FISH)
 - 5-Year Work Plan/Program
- Must include long range planning for facility needs over 5-year, 10-year, and 20-year periods.

The 5-Year Work Plan

- Submitted Annually by October 1
- Projected student population apportioned geographically at the local level (COFTE).
- An inventory of existing school facilities (FISH)
- Projection of facilities space needs, which may not exceed State Requirements for Educational Facilities (SREF) standards.
- Information about leased, loaned and donated space and relocatables.
- The general location of public schools proposed to be constructed over Long Range Planning period, including the anticipated capacity.
- Options that may reduce the need for additional permanent student stations.
- Criteria and method for determining the impact of proposed development to public school capacity.

5-Year Work Program

- Must include:
 - A schedule of major repairs/renovations
 - A schedule of c.o. projects necessary to ensure enough student stations
 - Plans for relocatables
 - Plans for alternative schedules to reduce space needs
 - Level of service/utilization
 - Plans for closure of any school and disposition of property
 - Project Priority List for projects funded with Capital Outlay and Debt Service (CO&DS)
 - Projected cost for each project and comparison to state low, average and high costs
 - Schedule of estimated c.o. revenues from each source
 - Schedule indicating which projects will be funded from the current projected revenues
 - Schedule of options for additional revenues for c.o. expenditures (e.g., Classrooms First)

5-year Work Plan/Program, Cont.

- Plan must meet needs of all growing communities in the district
- Must be consistent with local comprehensive plans and meet requirements for coordination w/ local governments
- Provision must be made for public comment on tentative plan
- First year of adopted plan is the capital outlay budget required in 1013.61.

Florida Inventory of School Houses

The Florida Inventory of School Houses (FISH) is an inventory of Florida public school districts' instructional and non-instructional facilities.

For inventory purposes, the Florida School for the Deaf and the Blind as well as the state university developmental research (laboratory) schools are treated the same as districts.

1013.31(1)(a), F.S., requires that a district's educational plan include an inventory of existing educational and ancillary facilities.

1013.31(1)(d), F.S., requires periodic updates of FISH. SREF requires that by April 1st of each year each district certify to the Office of Educational Facilities that its inventory is current and accurate.

What is in FISH

Only district-owned facilities and facilities leased long-term (40 or more years) by the districts from other entities should be in FISH. FISH also includes district-owned parcels of vacant land not associated with any facility. Each district's inventory consists of Facility records, Parcel records, Building records, Room records and COFTE records.

Level of Service

- School capacity
- Permanent capacity
- Dining Capacity
- Utilization Factor
- Percentage Utilization
- Primary Use
- Total COFTE

School Land Inventory

- Facility and Parcel number
- Facility use code
- COC(capital outlay classification)
- Facility name/address/ownership
- Acreage
- Low/high grade
- Year acquired
- Perm total buildings/NSF
- Relocatable total buildings/NSF
- Perm/relocatable student stations
- Total NSF
- Total number of classrooms

Educational Plant Survey Process

FISH Validation

- Every 5 years, in advance of the survey
- FDOE conducts onsite reviews of at least 5% of the facilities reported, to ensure:
 - Accurate square footage
 - Accurate design/utilization codes
 - Accurate student station counts

Educational Plant Survey Process

- Compare total COFTE projections in the survey with the school districts' projections.
- Review facilities lists to verify that student station and auxiliary facility space allocations do not exceed limits set by SREF.
- Review and confirm the application of uniform facility utilization factors.

Survey Process, Cont.

- Utilize documentation of programs offered per site, as submitted by the School Board, to analyze facility needs.
- Confirm that need projections for career and adult educational programs comply with needs documented by the Department of Education.
- Confirm the assignment of full-time student stations to all space except auxiliary.

Utilization Factors

- Elementary schools –100%
- Middle schools – 90%
- Combination schools – 90%

- High Schools
 - Under 300 - 70%
 - 301 – 600 - 75%
 - 601 – 900 - 80%
 - 901 – 1200 - 85%
 - 1201 – 1500 - 90%
 - Over 1500 - 95%

The following Core Spaces do not have student stations assigned:

- Cafeterias
- Multipurpose Dining Areas
- Media Centers
- Auditoriums
- Administration
- Elementary, Middle and High School Resource Rooms up to the number allowed by SREF
- Elementary Skills Labs up to the number allowed by SREF
- Elementary School Art and Music Rooms

The Survey Process, Cont.

- Review cost projections for conformity with cost limits set by s. 1013.64(6)(b)1 – A district school board... must not build new construction of an educational plant space with a total cost per student station, including change orders, that equals more than:
 - \$17,952 for an elementary school
 - \$19,386 for a middle school
 - \$25,181 for a high school
 - (January 2006) as adjusted annually to reflect increases or decreases in the Consumer Price Index

Survey Process, Continued

- Cost Per Student Station Caps do not apply where a contract has been executed for architectural and design services or for construction management services before July 1, 2017.

Meet the OEF team members!

Planning/Evaluation Team

- Mark Weigly, Architect, LEED AP, FCP, *Director*
- Sonja Suber, *Administrative Assistant*
- Violet Brown, *Senior Educational Program Director*
- Dale Adams, *Educational Consultant*
- Jimmie Childers, *Educational Consultant*
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