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## Capital Improvement Element Goals, Objectives and Policies

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*Goal 1: Undertake capital improvements necessary to provide adequate infrastructure and a high quality of life within sound fiscal practices.*

**Objective 1 – In general, use the capital improvements element as a means to meet the needs for capital facilities necessary to meet existing deficiencies, accommodate desired future growth and replace obsolete or worn-out facilities.** In particular achieve annual Town Commission use of this element as the framework to monitor public facility needs as a basis for annual capital budget and five-year program preparation. [9J-5.016(3)(b)1]

Policy 1.1 – In setting priorities, the following kinds of criteria shall be used by the Town Commission; in all cases, financial feasibility or budget impact will be assessed:

Public safety projects: any project to ameliorate a threat to public health or safety.

Quality of life projects: any project that would enhance the quality of life, such as a public streetscape improvement project.

Level of service or capacity projects: any project needed to maintain an adopted or otherwise desirable Level of Service.

Redevelopment projects: any project that would assist in the revitalization of deteriorated non-residential properties.

Environmental enhancement projects: any project which would enhance the environmental quality of the Atlantic Ocean, the Atlantic Ocean beach and dune system, Biscayne Bay or other natural resources. [9J-5.016(3)(c) 1 and 3]

Potable water projects:

Update the capital improvements schedule to maintain consistency with its 20-Year Water Supply Facilities Work Plan.

Use funds for the expansion, enhancement, and upgrade of the water supply facilities in accordance with the 20-Year Water Supply Facilities Work Plan.

Coordinate planning for the Town's infrastructure improvements related to water supply with the plans of state agencies, the South Florida Water Management District and Miami-Dade County.

Revision of priorities for the replacement of facilities, correction of existing water supply and facility deficiencies, and provision for future water supply and facility needs.

The Capital Improvement Element shall be reviewed and revised, as necessary, on an annual basis. The annual update shall demonstrate that the level of service standards will be maintained during the next five-year planning period.

In order to coordinate land uses with available and projected fiscal resources and a financially feasible schedule of capital improvements for water supply and facility projects, the Town shall include in its annual update of the its financially feasible five (5) year capital improvement project listing the first five (5) years of Water Supply Facilities Work Plan to ensure consistency between the Potable Water Sub-Element of the Infrastructure Element and the Capital Improvements Element.

The Town shall incorporate by reference the potable water projects for the FY10-14 period in the Miami-Dade Water Supply Facilities Work Plan adopted on [April 24, 2008](#).

Policy 1.2 – The Town shall prudently limit the amount of debt it assumes for capital improvements or other purposes. At a minimum, the Town shall not assume debt obligations which would result in the Town exceeding the debt ratios established by state law. [9J-5.016(3)(c)2]

Policy 1.3 – The Town shall maintain a current inventory of all Town-owned capital facilities, to include information on type, capacity, location and condition. [9J-5.016(3)(c)3]

Policy 1.4 – The Town shall regularly schedule inspections of all capital facilities to monitor and record the condition of each. [9J-5.016(3)(c)3]

Policy 1.5 – The Town shall use designated funding mechanisms such as the sewer assessments thereby freeing up general funds (and general obligation bonds) for such Town-wide projects identified in the policies of other Comprehensive Plan elements. [9J-5.016(3)(c)9]

Policy 1.6 – The Town shall prepare and adopt each year a five year capital improvements program and a one-year capital budget, to include all projects which entail expenditures of at least \$10,000 and a life of at least three years. Staff studies, engineering studies and other appropriate studies shall form the basis for preparation of a five-year capital improvement program, including one year capital budget. Among items which are specifically authorized and encouraged by this policy are the following: sidewalk repair and replacement; roadway and right-of-way drainage; street lighting; traffic signs, traffic engineer, signalization, and pavement markings; parking improvements serving the Harding Avenue Business District, and debt service and current expenditures for transportation capital projects in the foregoing program areas (including construction or reconstruction of roads). The preceding list is intended to be illustrative of appropriate expenditure categories. Other capital expenditures in related and different projects are hereby authorized. [9J-5.016(3)(c)7]

Policy 1.7 – The Town shall utilize the following implementation schedule to aid state requirements for annual updates and to ensure level of service standards are maintained.

- Preliminary meetings in April with the Building, Public Works, and Finance department to discuss capital improvement planning and revenues
- Capital improvement plan/budget workshop in July with the Town Commission for discussion of proposed projects and financing
- Prepare capital improvement plan in coordination with Town budget for approval in June.
- Public hearing on capital improvement plan/budget in September.

- Revise Schedule of Capital Improvements and update Capital Improvement Element in October.

Policy 1.8 – The Town will implement the projects listed in the capital improvement program and in the Implementation Schedule of this capital improvements element according to the schedule listed in this Element. [9J-5.016(3)(c)7]

Policy 1.9 –Capital improvements associated with the construction of educational facilities are not addressed in the Town’s Capital Improvement Plan or Schedule of Capital Improvements, but rather are the responsibility of the Miami-Dade County Public Schools. To address financial feasibility associated with school concurrency, the Miami-Dade County Public School Facilities Work Program, dated September 9, 2009, for educational facilities is incorporated by reference into the CIE.

Policy 1.10 – The Town, in conjunction with Miami-Dade County and the Miami-Dade County School Board, has the responsibility for providing school concurrency related to capital improvements and should continually seek to expand funding sources available to meet those requirements.

Policy 1.11 – For public school facilities, a proportionate share mitigation agreement, is subject to approval by Miami-Dade County School Board and the Town and must be identified in the adopted Miami-Dade County Public School Facilities Work Program.

Policy 1.12 – The Town shall update its Capital Improvements Element and Program annually, to include the annual update of the Miami-Dade County Public Schools 5-Year District Facilities Work Plan. Policy 1.13 – The annual update of the Capital Improvement Element shall include reflect proportionate fair-share contributions for transportation projects if applicable.

**Objective 2 – In general, the coordination of land use decisions and available or projected fiscal resources with a schedule of capital improvements which maintains adopted level of service standards and meets existing and future facility needs.** In particular, achieve coordinated Town use of: 1) existing and already approved development; 2) the Future Land Use Plan; 3) the financial analyses in this Element, and 4) the established Level of Service Standards in both reviewing development applications and in preparing the annual schedule of capital improvements.

Policy 2.1 – The following Level of Service (LOS) standards shall be maintained:

***Streets:***

*Local roads:* D

*Collector roads:* D

***State Roadways***

A Level of Service of LOS E+20 shall be established (where mass transit service having headways of 20 minutes less is provided within 1/2-mile distance, roadways shall operate at no greater than 120 percent of their capacity.)

***Sanitary Sewers:*** The County-wide “maximum day flow” of the preceding year shall not exceed 102 percent of the County treatment system’s rated capacity. The sewage generation standard shall be 155average gallons per capita per day.

**Potable Water:** The County-wide “maximum day flow” of the preceding year shall not exceed 98 percent of the County treatment and storage system’s rated capacity. The pressure shall be at least 20 pounds per square inch at the property line. The potable water consumption standard shall be 155 average gallons per capita per day.

**Drainage:** All nonresidential development and redevelopment shall adequately accommodate runoff to meet all Federal, state and local requirements. Stormwater shall be treated in accordance with the provisions of Chapter 17-25, *FAC* in order to meet receiving water standards in Chapter 17-302.500, *FAC*. One inch runoff shall be retained on site. Post-development runoff shall not exceed peak pre development runoff.

**Solid Waste:** The County solid waste disposal system shall maintain a minimum of five years’ capacity. For Town planning purposes, a generation rate of 5.6 pounds per person per calendar day shall be used.

**Parks:** The Town shall achieve and maintain a Level of Service standard of at least 6 acres of public recreation sites per 1,000 permanent population. [9J-5.016(3)(c)4]

**Public Schools:** The adopted level of service (LOS) standard for all public school facilities is 100% utilization of Florida Inventory of School Houses (FISH) Capacity (with Relocatable Classrooms). This LOS standard, except for Magnet Schools, shall be applicable in each public school concurrency service area (CSA), defined as the public school attendance boundary established by the Miami-Dade County Public Schools. The adopted LOS standard for Magnet Schools is 100% of FISH (with Relocatable Classrooms), which shall be calculated on a districtwide basis. Level of Service standards for public school facilities apply to those traditional educational facilities, owned and operated by the Miami-Dade County Public Schools, that are required to serve the residential development within their established Concurrency Service Area. Levels of Service standards do not apply to charter schools. However, the capacity of both charter and magnet schools will be credited against the impact of development.

Policy 2.2 – The concurrency management system formulas shall include the public facility demands to be created by “committed” development and the capital improvement schedule shall include the project implications of such committed development to assure facilities are provided concurrent with the impact of development. [9J-5.016(3) (c) 5]

Policy 2.3 – The Town shall not give development approval to any new construction, redevelopment, or renovation project which creates a need for new or expanded public capital improvement unless the project pays a proportional share of the costs of these improvements.[9J-5.017(3)(b) 4 and (c) 8]

Policy 2.4 – The Town shall maintain and improve as part of the land development code a concurrency management system which meets the requirements of 9J-5.0055. The concurrency management system shall specify that no development permit shall be issued unless the public facilities necessitated by a development (in order to meet level of service standards specified in the Transportation, Recreation and Open Space, Infrastructure and Public School Facilities) will be in place concurrent with the impacts of the development or the permit is conditional to assure that they will be in place. The requirement that no development permit shall be issued unless public facilities necessitated by the project are in place concurrent with the impacts of development shall be effective immediately and shall be interpreted pursuant to the provisions of Policy 1.4 of the Future Land Use Element. [9J-5.016(3)(c)6]

**9J-5.0016 Objective and Policy Requirements Not Applicable to Surfside:** Rule 9J-5 of the Florida Administrative Code requires communities to adopt as part of their Future Land Use Element objectives and policies which address various issues, except where those issues are not reasonable applicable to a particular community. The following objective and policy provisions of Rule 9J-5 are deemed by the Town of Surfside to be inapplicable:

9J5.016(3)(b)2 – The limitation of public expenditures that subsidize development in high hazard coastal areas.

**CAPITAL IMPROVEMENT ELEMENT IMPLEMENTATION SYSTEMS [9J-5.016(4)(a)]**

Five-Year Schedule of Capital Improvements: See schedule nearby in this element. [9J-5.016(4)(a) 1 and 2]

Other Programs: The other principal programs needed to implement this Element are as follows:

- Continue the annual capital programming and budgeting including use of the project selection criteria contained on Policy 1.1; related thereto will be the annual review of the Element.
- Amendments to the existing land development code to assure conformance to the “concurrency” requirements relative to development orders, levels of service and public facility timing as outlined in C below. [9J-5.016(4)(b)]

Monitoring and Evaluation: The Town Manager or designee shall annually prepare a status report on this Capital Improvement Element for submittal to the Town Commission. The primary purpose is to update the five-year schedule including the basis for next year’s capital budget. The project evaluation criteria shall be used in the project list review and special attention shall be devoted to maintenance of the level of service standards. This entire evaluation process shall be integrated into the Town’s annual budget process. [9J-5.016(5)]

Concurrency Management: Concurrency management shall be implemented as articulated in Land Use Element Policy 1.4 and Capital Improvement Element Policy 2.3. [9J-5.016(4)(b) and 9J-5.0055]

**MONITORING, UPDATING AND EVALUATION PROCEDURES as required by 9J-5.005(7), F.A.C.**

Annual Monitoring: In conjunction with one of the plan amendment cycles, the Local Planning Agency may annually conduct a public workshop on the Comprehensive Plan. A status report shall be provided by the Town Manager or designee and then citizen comment shall be solicited. This meeting shall be publicized by a legal notice in the newspaper plus efforts to have a news story in the Miami Herald and flyer announcements at the Town Hall. The LPA will then submit a report on the status of the Plan to the Town Commission. This report may be accompanied by recommended amendments, using the normal amendment process.

Evaluation and Appraisal Report (EAR): , tThe Town Manager or designee shall prepare an Evaluation and Appraisal Report in conformance with statutory requirements and with special emphasis on the extent to which the Comprehensive Plan objectives and policies have been achieved. The report will pinpoint obstacles to plan implementation and update baseline data.

Revised Objectives and Policies: As part of this EAR process, amendments to the goals, measurable objectives and policies based upon the above review, focusing short and long term community objectives. The citizen participation procedures used in preparing the Comprehensive Plan plus any future modifications thereto) shall be used in amending the Plan.

### ***Concurrency Management System Standards***

***Facility Capacity Determinations:*** The determination that there is adequate facility capacity for a proposed project shall be based on a formulation such as  $(A+B) \text{ minus } (C+D+E)$  shall be greater than zero, where

“A” equals the total ***design capacity*** of existing facilities;

“B” equals the total ***design capacity*** of any ***planned new facilities*** that will become available concurrent with the impact of the proposed development;

“C” equals existing demand on facilities measured as traffic volumes, sewer and water flows, utilization of FISH capacity (for schools) or population;

“D” equals committed demand from approved projects that are not yet constructed; and

“E” equals the demand anticipated to be created by a proposed project.

***Criteria for Measuring the Design Capacity of Existing and Planned New Facilities:*** The design capacity of existing and planned new facilities shall be determined as follows:

Sewage: the capacity of the County sewage treatment system.

Water: the capacity of the County water treatment and storage system.

Solid Waste: the capacity of the County disposal system.

Drainage: the on-site detention capability and/or storm sewer capacity.

Roadways: The standard for measuring highway capacities shall be the Florida DOT Table of Generalized Two-Way Peak Hour Volumes for Urbanized Areas or other techniques that are compatible to the maximum extent feasible with FDOT standards and guidelines. The measurement of capacity may also be determined by engineering studies provided that analysis techniques are technically sound and acceptable to the Town engineer.

Recreation: Measurement shall be based on recreation data in the Comprehensive Plan plus the latest Town population estimate with any necessary interpretation provided by the Town Manager or designee thereof.

Transit: The County Transit Agency bus schedules for routes within the Town.

***Criteria for Counting the Capacity of Planned New Facilities:*** The capacity of planned new facilities may be counted only if the following timing requirements to ensure that adequate public facilities are available to meet level of service standards with the impact of development:

- (a) Sanitary sewer, solid waste, drainage, adequate water supplies, and potable water facilities shall be in place and available to serve new development no later than the issuance by the local government of a certificate of occupancy or its functional equivalent. Prior to approval of a building permit or its functional equivalent, the Town shall determine whether adequate water supplies to serve the new development will be available no later than the anticipated date of issuance by the Town of a certificate of occupancy or its functional equivalent.
- (b) Parks and recreation facilities to serve new development shall be in place or under actual construction no later than 1 year after issuance by the local government of a certificate of occupancy or its functional equivalent. However, the acreage for such facilities shall be dedicated or be acquired by the Town prior to issuance of a certificate of occupancy or its functional equivalent, or funds in the amount of the developer's fair share shall be committed no later than the local government's approval to commence construction.

- (c) Transportation facilities needed to serve new development shall be in place or under actual construction within 3 years after the Town approves a building permit that results in traffic generation.

**Responsibility for Concurrency Monitoring System:** The manager or designee thereof shall be responsible for monitoring facility capacities and development activity to ensure that the concurrency management system data base is kept current, i.e., includes all existing and committed development. This data base shall be used to systematically update the formulas used to assess projects. An annual report shall be prepared.

**Capacity Reservation:** Any development permit application which includes a specific plan for development, including densities and intensities, shall require a concurrency review. Compliance will be finally calculated and capacity reserved at time of final action on a **design review** or **building permit** if no **design review** is required or enforceable developers agreement. Phasing of development is authorized in accordance with Rule 9J-5.0055. Applications for development permits shall be chronologically logged upon approval to determine rights to available capacity. A capacity reservation shall be valid for a time to be specified in the land development code; if construction is not initiated during this period, the reservation shall be terminated.

**Public School Concurrency Review :** Prior to the issuance of any development order for new residential development or redevelopment, public school facilities needed to support the development at adopted school LOS standards must meet the following requirements:

1. The necessary public school facilities and services are in place or under actual construction within three years after issuance of final subdivision or site plan approval, or the functional equivalent.
2. The necessary facilities and services are guaranteed in an enforceable development agreement, pursuant to Section 163.3220, F.S., or an agreement or development order issued pursuant to Chapter 380, F.S., to be in place or under actual construction not more than three years after issuance of a certificate of occupancy or its functional equivalent.

School concurrency approval for the development and anticipated students shall be valid for up to two (2) years, beginning from the date the application received final approval from the Town.

**Project Impact or Demand Measurement:** The concurrency management user's procedural guide (a supplement to the land development code) will contain the formulas for calculating compliance plus tables which provide generation rates for water use, sewer use, solid waste and traffic, by land use category. Alternative methods are acceptable to the Town Manager or designee thereof may also be used by the applicant. For example, traffic generation may be based upon the Institute of Transportation Engineer's "Trip Generation" manual.

#### **Schedule of Capital Improvements by Category and Funding Sources**

Tables 9-8 A-C and Table 9-9 make up the Town's schedule of Capital Improvements. Funding sources are shown where applicable.

**Table 9-8A  
Stormwater Projects**

<b>Town Stormwater Projects</b>							
<b>Project Name</b>	<b>Location</b>	<b>FY 2010</b>	<b>FY2011</b>	<b>FY2012</b>	<b>FY2013</b>	<b>FY2014</b>	<b>Total</b>
<b>Stormwater Pollution Control Project</b>	<b>Townwide</b>	472,000	151,000	172,000	172,000	172,000	1,139,000
<b>Total Cost of Stormwater Projects</b>		472,000	151,000	172,000	172,000	172,000	1,139,000
<b>Funding Sources</b>	<b>Florida Dept. of Environmental Protection</b>	134,500	151,000	172,000	172,000	172,000	801,500
	<b>Stormwater Fund Balance</b>	337,500					337,500
<b>Total Funding Available for Stormwater Pollution Control Project</b>		472,000	151,000	172,000	172,000	172,000	1,139,000
<b>Balance</b>		0	0	0	0	0	0

Source: Town of Surfside, Calvin, Giordano and Associates, Inc.

Notes: The FDEP grant for the stormwater improvements was signed on February 26, 2008. FDOT funds –agreement approved January 9, 2008.



**Table 9-8B  
Wastewater and Potable Water Projects**

<b>Town Wastewater and Potable Water Projects</b>							
<b>Project Name</b>	<b>Location</b>	<b>FY 2010</b>	<b>FY2011</b>	<b>FY2012</b>	<b>FY2013</b>	<b>FY2014</b>	<b>Total</b>
<b>Wastewater System Rehabilitation Program</b>	<b>Townwide</b>	1,145,000	1,145,000	725,000	20,000	20,000	3,055,000
<b>Water System Program</b>	<b>Townwide</b>	1,428,000	285,600	285,600	285,600	285,600	2,570,400
<b>Total Cost of Projects</b>		2,573,000	1,430,600	1,010,600	305,600	305,600	5,625,400
<b>Funding Sources</b>	<b>Water and Sewer Fund-Fund Balance</b>	1,533,328	1,910,593	2,159,126	2,245,491	2,335,311	10,183,849
	<b>General Fund</b>	210,672					
	<b>General Obligation Bond</b>	829,000					829,000
<b>Total Funding Available for Stormwater Pollution Control Project</b>		2,362,328	1,910,593	2,159,126	2,245,491	2,335,311	11,012,849
<b>Balance</b>		0	479,993	1,148,5260	1,939,891	2,029,711	5,387,449

Source: Town of Surfside, Calvin, Giordano and Associates, Inc.

Notes: Description of Wastewater Rehabilitation Program: The Wastewater Rehabilitation Plan will be broken into three phases. Phase I will bring the town into partial compliance with the mandates from DERM (place full dish gaskets on manhole openings). Phase II (repair pipes determined to have inflow/infiltration issues) and III (renovating pump stations) will complete the requirements as outlined in the Sanitary Sewer Evaluation Study (SSES).

Description of Water System Program: This project provides for several miles of water system pipe known to be in particularly poor repair. This pipe replacement program will address those existing iron water pipes that are undersized, corroded or both.

The Town Commission approved water and sewer service charge increases on October 14, 2008. Therefore, the fund balances for FY2010 and FY2011 can be considered committed sources of funding.

**Table 9-8C  
FDOT Projects**

<b>FDOT Projects</b>							
<b>Project Name</b>	<b>Location</b>	<b>FY 2010</b>	<b>FY 2011</b>	<b>FY 2012</b>	<b>FY 2013</b>	<b>FY 2014</b>	<b>Total</b>
SRA1A/Collins Avenue Resurfacing FDOT Item No. 4198581	150 feet north of 75th Street to north of 96 <sup>th</sup> Street			\$5,156,000			\$5,516,000
SRA1A/Harding Avenue Resurfacing FDOT Item No. 4198601	75 Street to 91 <sup>st</sup> Street			\$1,462,000			\$1,462,000
SRA1A/Harding Avenue Resurfacing FDOT Item No. 4198231	From Bal Harbour Shop Entrance to 94 <sup>th</sup> Street		\$1,056,000				\$1,056,000
<b>Total Cost of FDOT Projects</b>			<b>\$1,056,000</b>	<b>\$6,978,000</b>			<b>\$8,034,000</b>

Source: FY2010-2014 Transportation Improvement Program, Miami-Dade Metropolitan Planning Organization