



Independent Sales Surtax Oversight Committee (ISSOC)

Board Report

April 12, 2022



PERSONAL | PASSIONATE | PROGRESSIVE



Agenda

- Committee Overview
- Committee Meeting Activities
- Sales Surtax Results
- Communications
- Committee Recommendations to Board



Committee Overview

- 14 appointed independent Community Members (2 per Board Member)
- Quarterly Meetings – March, June, September, December
- Charge:
 - ✓ Determination as to use and expenditures – consistent with referendum
 - ✓ Make recommendations as to expenditures
 - ✓ Make recommendations as to communication to the Public
- Board Report Quarterly
 - ✓ Chair or Designee
 - ✓ To date, all meeting minutes are posted online
 - ✓ Future written report - dual signed Staff and Chair
 - ✓ Staff Designee in person for January, April, July
 - ✓ Chair plus Staff Designee - in person for October



Committee Meeting Activities

Reports from Staff

- Revenue Receipts & Project Expenditures (actual and projected)
- Projects Completed, In Process, and Planned (per 4 referendum categories)
 1. New Construction and Major Renovations
 2. Safety and Security
 3. Technology
 4. Capital Maintenance Projects
- Committee Motions
 - ✓ Projects comply with referendum scope
 - ✓ Expenditures comply with referendum scope
- No Exceptions since inception

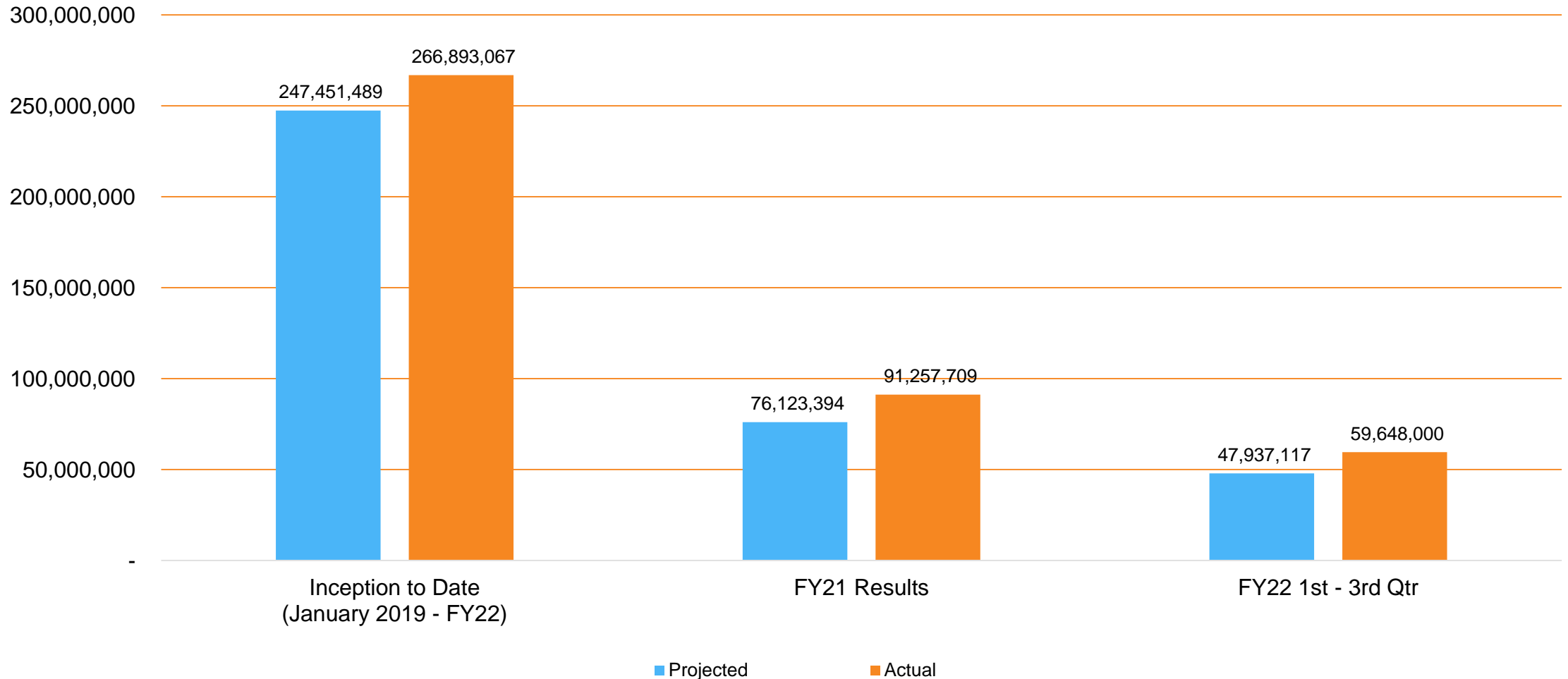


Sales Surtax Results

- Total Funds received through 3/7/2022
\$267,742,404
- Total Funds expended through 3/7/2022
\$168,131,297
- 100% of Schools have received support
- 3,783 new student seats created



School District of Lee County Sales Tax Revenue – Estimated & Actual as of 3/07/22





Construction & Renovation Projects

- 3,783 new student seats created
 - ✓ More than 3% increase in seats
- 6 Major Projects
 - ✓ 2 New Schools, completed
 - Gateway High, Lehigh Acres Middle
 - ✓ 1 Renovation, completed
 - ✓ 3 Remodels in progress
 - James Stephens Elementary, Fort Myers Technical, Riverdale High





Safety, Security & Technology Projects

■ Safety and Security

- ✓ \$39,381,184 expended
- ✓ All District campuses upgraded
- ✓ Significant COVID Response

■ Technology

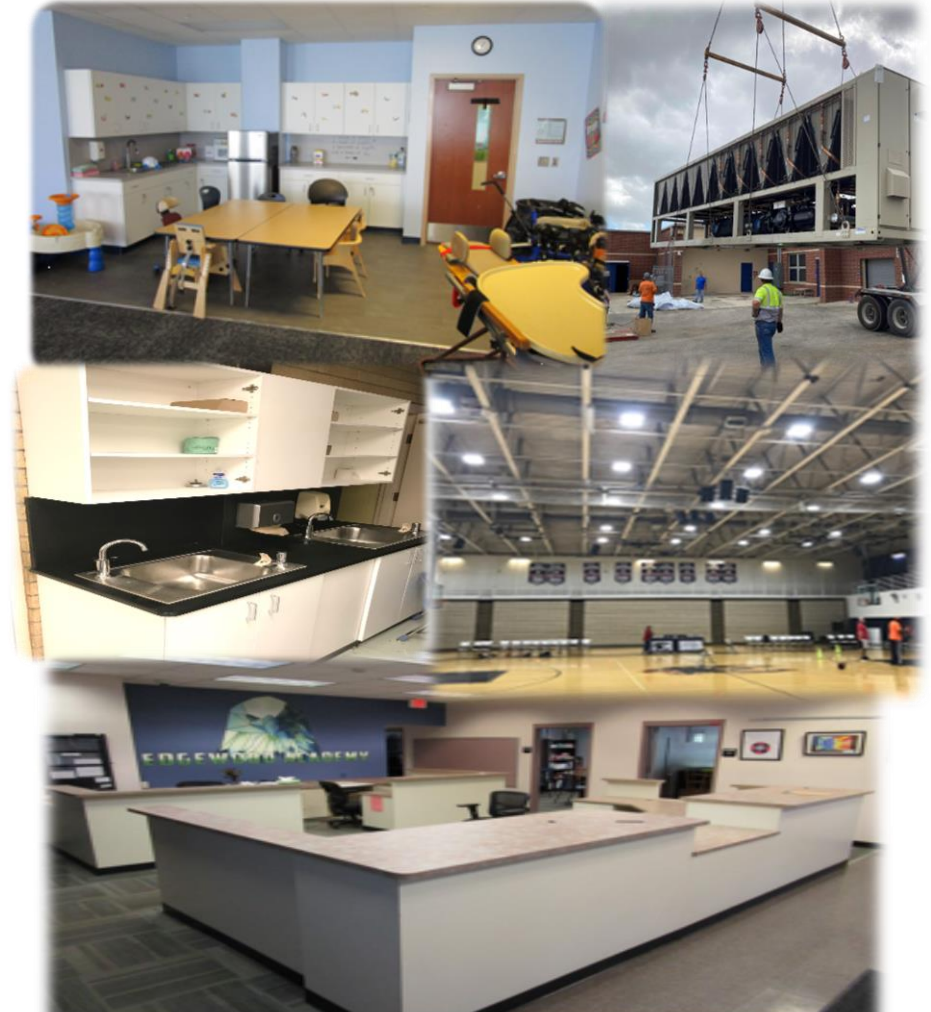
- ✓ \$43,406,418 to Date
- ✓ 100% of Schools will realize improvements
- ✓ From Classroom Instructional Technology to Student Home Study





Capital Maintenance Projects

- \$52,518,788 expended to improve learning environments
- Variety of Project types include:
 - Chillers, Switchgear, Cabinets, Blinds, Restrooms, Paving, Lighting, Doors and Windows, Flooring, Major Painting, Gutter and Downspout Replacement, Intercom/PA Systems, Elevator Modernizations, Roof Replacements, Emergency Generators, Walkway Replacements





Communications

- Staff/District Communication Efforts
 - ✓ Social Media
 - ✓ District Website
 - ✓ Community Presentations
- In Progress
 - ✓ Economic Impact Study – FGCU
- ISSOC Communications Focus Group
 - ✓ March Meeting
 - ✓ 5-6 Committee Members plus 2 Staff
 - ✓ Present Communications Plan to Board in October





Recommendations to Board

- Board Policy 1.26 Section 4(f)3
 - ✓ ISSOC's recommendations
 - “regarding the District's use and expenditure of surtax proceeds.”

- Current
 - ✓ District Capital Committee – Staff
 - ✓ Board Advisory Committees – Construction, Finance – includes community
 - ✓ Workshops, Town Halls, Public Input
 - ✓ Board Action

- Committee Recommendation
 - ✓ Avoid confusion
 - ✓ Remove or reword Policy 1.26 - Section 4(f)3



Questions?

