
SNOHOMISH COUNTY COUNCIL
Snohomish County, Washington

ORDINANCE NO. 00-055

ADOPTING 2000-2005 CAPITAL FACILITIES PLANS
FOR THE
ARLINGTON, MARYSVILLE, MONROE AND MUKILTEO SCHOOL DISTRICTS
PURSUANT TO SCC 26C.26.030

WHEREAS, Snohomish County has adopted an impact fee ordinance to mitigate the impacts of new development on public school facilities pursuant to RCW 82.02.050; and

WHEREAS, under RCW 82.02.050(4), the county may only collect and spend impact fees for public facilities which are addressed by the capital facilities plan element of the comprehensive plan; and

WHEREAS, pursuant to Title 26C SCC, school districts must submit capital facilities plans to the county for adoption to be eligible for school impact fees; and

WHEREAS, existing school capital facilities plans, including the 1998-2003 Capital Facilities Plans for Arlington School District No. 16, Marysville School District No. 25, Monroe School District No. 103, and Mukilteo School District No. 6, were adopted by Snohomish County in 1998 and will expire on December 31, 2000; and

WHEREAS, school districts must submit updated capital facilities plans to Snohomish County for review and adoption before December 31, 2000 in order to maintain their eligibility to collect school impact fees after December 31, 2000; and

WHEREAS, the Arlington, Marysville, Monroe and Mukilteo School Districts have submitted their updated capital facilities plans for the period 2000-2005 to the county Department of Planning and Development Services (PDS) pursuant to SCC 26C.26.010; and

WHEREAS, PDS has reviewed these plans - including the impact fee calculations using the formula in Table 1 of SCC 26C.28.010 - and has consulted with

the School Technical Review Committee authorized by SCC 26C.26.020(3) as amended by Ordinance 99-107 – and has determined that each plan meets the requirements of SCC 26C.26.020; and

WHEREAS, the Snohomish County Planning Commission held a public hearing on the Marysville plan on May 23, 2000, and a public hearing on the Arlington, Monroe, and Mukilteo plans on June 27, 2000; and

WHEREAS, the Snohomish County Council held a public hearing on these plans on September 6, 2000; and

WHEREAS, SEPA review on these plans has been performed by each school district, acting as lead agency; and

WHEREAS, SCC 26C.26.030 provides that any school district plan adopted by the County Council shall be incorporated by reference into the capital facilities element of the county comprehensive plan; and

WHEREAS, the County Council considered the entire hearing record, including the Planning Commission's recommendation, and written and oral testimony submitted during the public hearings.

NOW, THEREFORE, BE IT ORDAINED:

Section I: Authority. This ordinance is adopted to implement Title 26C SCC, as amended by Amended Ordinance No. 97-095 and Amended Ordinance No. 99-107, with respect to the Arlington, Marysville, Monroe and Mukilteo School Districts. This ordinance is necessary to address identified impacts of development on these school districts in order to protect the public health, safety, and welfare, and to exercise Snohomish County's authority to impose impact fees pursuant to RCW 82.02.050 et seq.

Section 2: Findings of fact and conclusions. The County Council makes the following findings of fact and conclusions:

A. The 2000-2005 Capital Facilities Plans for the Arlington, Marysville, Monroe and Mukilteo School Districts, adopted herein, will further the goals of the GMA for the provision of adequate public facilities to accommodate growth.

B. The 2000-2005 Capital Facilities Plans for the Arlington, Marysville, Monroe and Mukilteo School Districts contain the necessary components for such comprehensive

plan elements as prescribed in Chapter 36.70A RCW and in Appendix F of the Snohomish County General Policy Plan.

C. PDS has reviewed these district plans, including the impact fee calculations using the formula in Table 1 of SCC 26C.28.010, and has determined that each plan meets the requirements of SCC 26C.26.020. This determination was made after consultation with the School Technical Review Committee, which reviewed each plan prior to the Planning Commission's public hearing. The record demonstrates that these school capital facilities plans meet the requirements of Title 26C SCC, as amended, and is an appropriate basis for the collection of school impact fees.

D. The Arlington, Marysville, Monroe and Mukilteo School Districts have met the requirements of SCC Title 26C and of their agreements with Snohomish County concerning the operation and administration of the school impact fee program.

E. SEPA requirements have been satisfied by each school district, acting as lead agency, completing an environmental checklist and issuing a Determination of Nonsignificance for each plan.

F. The Planning Commission has reviewed the school districts' plans, has conducted a public hearing on each plan, and has recommended adoption of these plans as part of the capital facilities element of the GMA comprehensive plan.

G. The County Council conducted a public hearing on these four school district capital facilities plans on September 6, 2000.

H. Public participation requirements of the GMA and the county code have been met or exceeded through the public hearing conducted by the Planning Commission and the County Council.

I. The adoption of these district plans is consistent with the GMA, the county's GMA comprehensive plan, and the Countywide Planning Policies for Snohomish County.

Section 3: Basis. The County Council bases its findings and conclusions on the entire record of testimony and exhibits, including all written and oral testimony before the Planning Commission and the County Council.

Section 4. Amended Ordinance 94-125, as amended by Amended Ordinance No. 98-126 on December 3, 1998 is amended to read:

Section 4. Based on the foregoing findings and conclusions, the county council hereby adopts the Snohomish County GMA Comprehensive Plan required by the Growth Management Act consisting of the General Policy Plan and Future Land Use Map, the Transportation Element, and the Capital Facilities Element. Attached hereto as Exhibit A is the General Policy Plan element of the comprehensive plan. As part of the GMA Comprehensive Plan, the county council hereby adopts the agricultural, forest land and mineral land designations shown in the Future Land Use map attached to the General Policy Plan and shown in parcel specific detail on a set of county assessor's maps, attached hereto as Exhibit B. As part of the GMA Comprehensive Plan, the county council also adopts the Transportation Element, attached hereto as Exhibit C, and the capital facilities element, which consists of the following documents: Snohomish County 1998-2003 Capital Plan, attached hereto as Exhibit D; Arlington School District Capital Facilities Plan ((~~1997-2003~~)) 2000-2005, attached hereto as Exhibit D-1; Darrington School District #330 Capital Facilities Plan 1997-2003, attached hereto as Exhibit D-2, Everett School District Capital Facilities Plan 1997-2003, attached hereto as Exhibit D-3, Granite Falls School District #332 Capital Facilities Plan 1998-2003, attached hereto as Exhibit D-4; Lake Stevens School District #4 Capital Facilities Plan 1997-2003, attached hereto as Exhibit D-5; Lakewood School District #306 Capital Facilities Plan 1997-2003, attached hereto as Exhibit D-6; Marysville School District #25 ((~~1998-2003~~)) 2000-2005 Capital Facilities Plan, attached hereto as Exhibit D-7; Monroe School District #103 Capital Facilities Plan ((~~1998-2003~~))2000-2005,, attached hereto as Exhibit D-8; Mukilteo School District #6 Capital Facilities Plan ((~~1998-2003~~)) 2000-2005, attached hereto as Exhibit D-9; 1998 Capital Facilities Plan (Northshore School District #417), attached hereto as Exhibit D-10; Snohomish School District Capital Facilities Plan 1997-2003, attached hereto as Exhibit D-11, Stanwood School District #401 Capital Facilities Plan 1997-2003, attached hereto as Exhibit D-12; and Sultan School District #311 Capital Facilities Plan 1997-2003, attached hereto as Exhibit D-13. The Countywide Comprehensive Park and Recreation Plan, adopted by Motion 94-428, is a part of the GMA Comprehensive Plan, and is attached hereto as Exhibit E.

Section 5: Adoption. Based on the foregoing findings and conclusions, the Arlington School District No. 16 2000-2005 Capital Facilities Plan, attached hereto as Exhibit A, the Marysville School District No. 25 2000-2005 Capital Facilities Plan, attached hereto as Exhibit B, and the Monroe School District No. 103 2000-2005 Capital Facilities Plan, attached hereto as Exhibit C, and the Mukilteo School District No. 6 2000-2005 Capital Facilities Plan,attached hereto as Exhibit D are hereby adopted by reference. These plans hereby replace the Arlington School District No. 16 1997-2003 Capital Facilities Plan, the Marysville School District No. 25 Capital Facilities Plan, the Monroe School District No. 103 1998-2003 Capital Facilities Plan, and the Mukilteo School District No.

6 1998-2003 Capital Facilities Plan, respectively, previously adopted by Amended Ordinance 98-126.

Section 6: Expiration. Each school district's capital facilities plan herein adopted shall remain in effect for a period of two years from the effective date of this ordinance, unless an updated plan is submitted and approved prior to that date, or as otherwise provided by Title 26C SCC. Plan approval remains in effect within this period only so long as the school districts meet the requirements of the GMA concerning the collection and use of impact fees, and other conditions established in state law or in Title 26C SCC.

Section 7: Effective date. Pursuant to RCW 36.70A.130, the amendment to the County's Capital facility Element and the effective date of this ordinance shall be the same date as the effective date of the ordinances which adopt the County's capital improvement plan and 2001 Budget.

Section 8: Severability. If any section, sentence, clause or phrase of this ordinance shall be held to be invalid or unconstitutional by the Growth Management Hearings Board (Board), or a court of competent jurisdiction, such invalidity or unconstitutionality shall not affect the validity or constitutionality of any other section, sentence, clause or phrase of this ordinance. Provided, however, that if any section, sentence, clause or phrase of this ordinance is held to be invalid by the Board or court of competent jurisdiction, then the section, sentence, clause or phrase in effect prior to the effective date of this ordinance shall be in full force and effect for that individual section, sentence, clause or phrase as if this ordinance had never been adopted.

PASSED this 6th day of September, 2000

SNOHOMISH COUNTY COUNCIL
Snohomish County, Washington

Barbara Gothman
Chairperson

ATTEST:

Sheila McCallister
Sheila McCallister
Asst. Clerk of the Council

(✓) APPROVED
( ) EMERGENCY
( ) VETOED

DATE: 9/8/00

Joan M. Earl
JOAN M. EARL
Deputy Executive

ATTEST:

Connie Merritt

APPROVED AS TO FORM ONLY:

Deputy Prosecuting Attorney

Exhibit A

# ARLINGTON SCHOOL DISTRICT

## CAPITAL FACILITIES PLAN

## 2000-2005

# ARLINGTON SCHOOL DISTRICT

## CAPITAL FACILITIES PLAN

## 2000-2005

## BOARD OF DIRECTORS

**Steve Peterson, President**
**Sue Winterhalter**
**Carolyn Erickson**
**Kay Duskin**
**Robert McClure**

## SUPERINTENDENT

**Linda Byrnes**

For information regarding the Arlington School District Capital Facilities Plan, contact the Office of the Superintendent, Arlington School District, District Administration Office, 315 N. French Street, Arlington, WA 98223. Telephone: (360) 435-2156; Fax: (360) 435-0752.
Approved on March 27, 2000; revised on May 10, 2000

## Table of Contents

## INTRODUCTION

### *A. Purpose of the Capital Facilities Plan*

The Washington State Growth Management Act (the "GMA") includes schools in the category of public facilities and services. School districts have adopted capital facilities plans to satisfy the requirements of the GMA and to identify additional school facilities necessary to meet the educational needs of the growing student populations anticipated in their districts.

The Arlington School District (the "District") has prepared this Capital Facilities Plan (the "CFP") to provide Snohomish County (the "County") and the City of Arlington (the "City") with a schedule and financing program for capital improvements over the next six years (2000-2005).

In accordance with the Growth Management Act, the Snohomish County Ordinance Nos. 97-095 and 99-107, this CFP contains the following required elements:

- Future enrollment forecasts for each grade span (elementary, middle, and high schools).
- An inventory of existing capital facilities owned by the District, showing the locations and capacities of the facilities.
- A forecast of the future needs for capital facilities and school sites.
- The proposed capacities of expanded or new capital facilities.
- A six-year plan for financing capital facilities within projected funding capacities, which clearly identifies sources of public money for such purposes. The financing plan separates projects and portions of projects which add capacity from those which do not, since the latter are generally not appropriate for impact fee funding.
- A calculation of impact fees to be assessed and support data substantiating said fees.

In developing this CFP, the District followed the following guidelines set forth in the Snohomish County General Policy Plan:

- District should use information from recognized sources, such as the U.S. Census or the Puget Sound Regional Council. School districts may generate their own data if it is derived through statistically reliable methodologies. The information must not be inconsistent with Office of Financial Management ("OFM") population forecasts. Student generation rates must be independently calculated by each school district.
- The CFP must comply with the GMA.

- The methodology used to calculate impact fees must comply with the GMA. The CFP must identify alternative funding sources in the event that impact fees are not available due to action by the state, county or cities within the District.
- The methodology used to calculate impact fees also complies with the criteria and the formulas established by the County and the City.

### *B. Overview of the Arlington School District*

Two-hundred square miles in area, the District encompasses the City of Arlington and portions of unincorporated Snohomish County. The District is bordered by the Conway, Darrington, Granite Falls, Lakewood, Marysville, Sedro-Woolley, and Stanwood School Districts.

The District serves a student population of 4,717 with four elementary schools (grades K-6, with the Trafton School serving K-5), one middle school (grades 7-8), one high school (grades 9-12), one alternative high school (grades 9-12), and one support facility for home schooled children (grades K-12). For the purposes of facility planning, this CFP considers grades K-6 as elementary, grades 7-8 as middle school, and grades 9-12 as high school. For purposes of this CFP, enrollment in the Stillaguamish Valley School, a home school support facility serving grades K-12, is not included.

The most significant issues facing the District in terms of providing classroom capacity to accommodate existing and projected demands are:

- Facility needs have been projected in both the near- and long-term at the elementary and high school levels. For example, the current high school lacks capacity to accommodate the 1,400 students enrolled, and the Kent Prairie Elementary service area has experienced significant population growth and requires additional classroom space.
- Voter approval of bonds for capital projects to address the needs of the growing student population in the District. In March 2000, the voters passed a $54 million bond issue for school construction and site acquisition.

In addition the District plans to modernize Presidents Elementary School. This project does not add capacity.

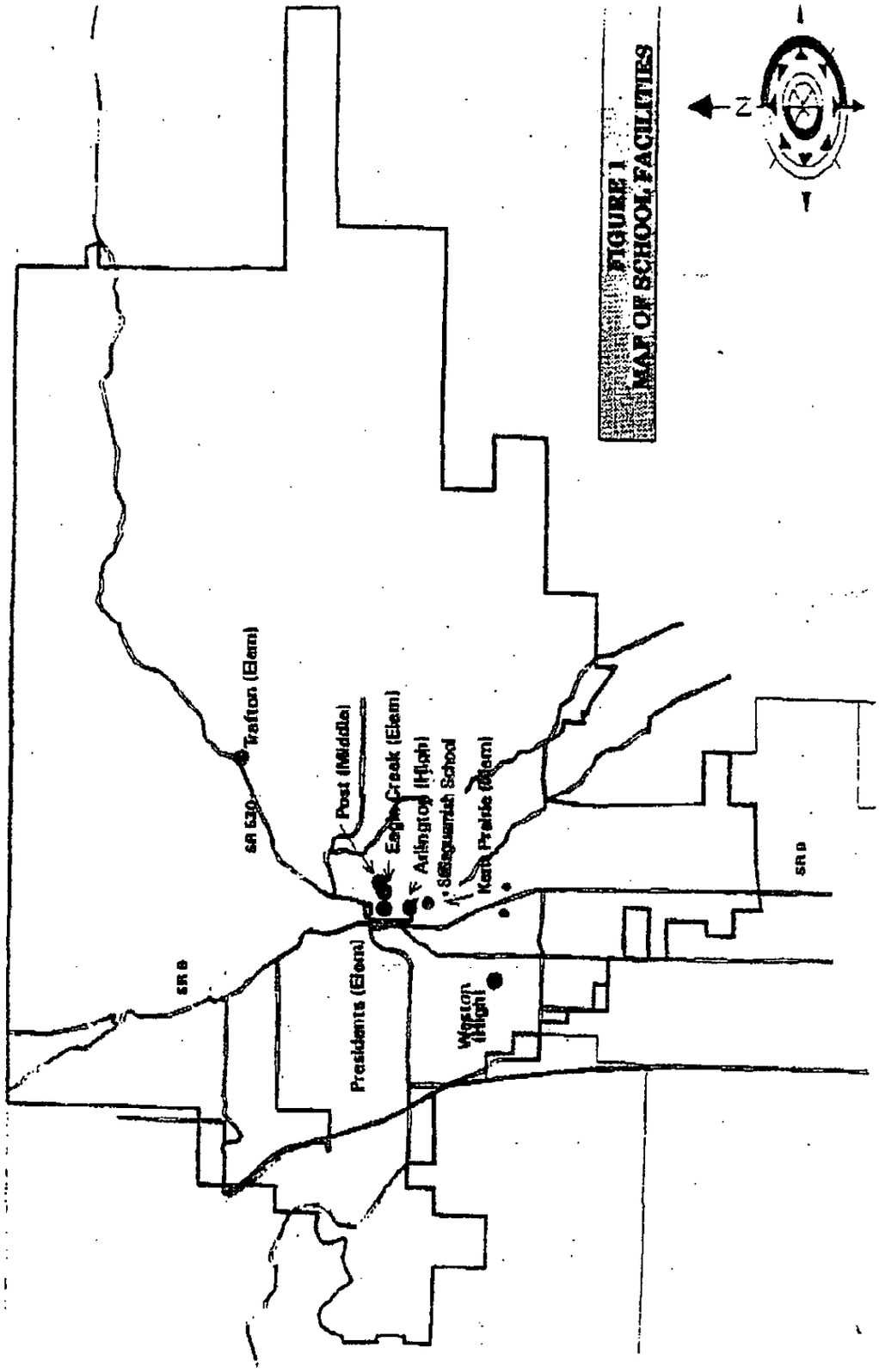


**FIGURE 1**
**MAP OF SCHOOL FACILITIES**

## SECTION 2
## DISTRICT EDUCATIONAL PROGRAM STANDARDS

School facility and student capacity needs are dictated by the types and amounts of space required to accommodate the District's adopted educational program. The educational program standards which typically drive facility space needs include grade configuration, optimum facility size, class size, educational program offerings, classroom utilization and scheduling requirements, and use of relocatable classrooms (portables).

In addition to student population, other factors such as collective bargaining agreements, government mandates, and community expectations also affect classroom space requirements. Traditional educational programs are often supplemented by programs such as special education, bilingual education, preschool and daycare programs, computer labs, and music programs. These programs can have a significant impact on the available student capacity of school facilities.

### *A. Districtwide Educational Program Standards*

Special programs offered by the District at specific school sites include, but are not limited to:

- ECEAP;
- Presidents Elementary program for handicapped students;
- Enhanced Learning Program/Highly Capable (Eagle Creek Elementary); and
- Indian Ridge Program.

District educational program standards may change in the future as a result of various external or internal changes. External changes may include mandates or needs for special programs, or use of technology. Internal changes may include modifications to the program year, class sizes, and grade span configurations. Changes in physical aspects of the school facilities could also affect educational program standards. The school capacity inventory will be reviewed periodically and adjusted for any changes to the educational program standards. These changes will also be reflected in future updates of this CFP.

The District educational program standards which directly affect school capacity are outlined below for the elementary, middle, and high school grade levels.

### *B. Educational Program Standards For Elementary Schools*

- Class size for Kindergarten and grades 1-4 are targeted not to exceed 25 students;
- Class size for grades 5-6 are targeted not to exceed 27 students;

- Special Education for some students is provided in a self-contained classroom;
- Music instruction will be provided in a separate classroom; and
- All elementary schools currently have a room dedicated as a computer lab.

### C. *Educational Program Standards For Middle and High Schools*

- Class size for middle school grades 7-8 are targeted not to exceed 29 students;
- Class size for high school grades 9-12 are targeted not to exceed 30 students; and
- It is not possible to achieve 100% utilization of all regular teaching stations throughout the day. Therefore, high school classroom capacity has been adjusted using a utilization factor in the range of 90% to 96% (based on a regular school day) or 80% to 85% (based on an extended day schedule) depending on the physical characteristics of the high school facilities. Middle school classroom capacity has been adjusted using a utilization factor of 85% to 90% depending on the physical characteristics of the middle school.
- Special Education for some students will be provided in a self-contained classroom.
- Identified students will also be provided other programs in classrooms designated as follows:
  - Resource Rooms (i.e. computer labs, study rooms).
  - Learning Support Centers.
  - Program Specific Classrooms (i.e., music, drama, art, home and family education).

## SECTION 3
## CAPITAL FACILITIES INVENTORY

The facilities inventory serves to establish a baseline for determining the facilities necessary to accommodate future demand (student enrollment) at acceptable levels of service. This section provides an inventory of capital facilities owned and operated by the District including schools, relocatable classrooms, undeveloped land and support facilities. School facility capacity was inventoried based on the space required to accommodate the District's adopted educational program standards. *See* Section 2. A map showing locations of District facilities is provided as Figure 1.

### *A. Schools*

The District maintains four elementary schools, one middle school, one high school, an alternative high school, and the Stillaguamish Valley School. Elementary schools accommodate grades K-6, except the Trafton School which accommodates grades K-5, the middle school serves grades 7-8, and the high school and alternative high school provide for grades 9-12. The Stillaguamish Valley School serves grades K-12.

School capacity was determined based on the number of teaching stations within each building and the space requirements of the District's adopted educational program. It is this capacity calculation that is used to establish the District's baseline capacity, and to determine future capacity needs based on projected student enrollment. The school capacity inventory is summarized in Tables 1, 2, and 3.

The Stillaguamish Valley School and the Weston High School are housed in leased facilities and are not included in this CFP for the purposes of measuring capacity or projecting enrollment. Relocatable classrooms are not viewed by the District as a solution for housing students on a permanent basis. Therefore, these facilities were not included in the school capacity calculations provided in Tables 1, 2, and 3.

### *B. Relocatable Classrooms*

Relocatable classrooms are used on an interim basis to house students until funding can be secured to construct permanent classrooms. The District currently uses 37 relocatable classrooms at various school sites throughout the District to provide additional interim capacity. A typical relocatable classroom can provide capacity for a full-size class of students. Current use of relocatable classrooms throughout the District is summarized in Table 4.

## Table 1
## Elementary School Inventory

| Elementary School | Site Size (Acres) | Building Area (Square Feet) | Teaching Stations | Permanent Capacity | Year Built or Remodeled |
|---|---|---|---|---|---|
| Eagle Creek | 23.70 | 58,330 | 29 | 743 | 1989 |
| Kent Prairie | 10.10 | 58,488 | 28 | 706 | 1993 |
| Presidents | 12.40 | 60,109 | 26 | 666 | 1959 |
| Trafton | 3.73 | 8,475 | 4 | 100 | 1913 |
| **TOTAL** | 49.93 | 185,402 | 85 | 2,215 | |

## Table 2
## Middle School Inventory

| Middle School | Site Size (Acres) | Building Area (Square Feet) | Teaching Stations | Permanent Capacity | Year Built or Remodeled |
|---|---|---|---|---|---|
| Post Middle | 24.60 | 77,663 | 31 | 899 | 1993 |

## Table 3
## High School Inventory

| High School | Site Size (Acres) | Building Area (Square Feet) | Teaching Stations | Permanent Capacity | Year Built or Remodeled |
|---|---|---|---|---|---|
| Arlington High | 27.00 | 136,875 | 38 | 1,140 | 1978 |

## Table 4
## Relocatable Classroom (Portable) Inventory

| Elementary School | Relocatables | Interim Capacity |
|---|---|---|
| Eagle Creek | 1 | 27 |
| Kent Prairie | 4 | 108 |
| Presidents | 7 | 189 |
| Trafton | 4 | 108 |
| **SUBTOTAL** | 16 | 459 |

| Middle School | Relocatables | Interim Capacity |
|---|---|---|
| Post Middle | 5 | 135 |
| **SUBTOTAL** | 5 | 135 |

| High School | Relocatables | Interim Capacity |
|---|---|---|
| Arlington High | 16 | 432 |
| **SUBTOTAL** | 16 | 432 |

| | | |
|---|---|---|
| **TOTAL** | 37 | 1,026 |

### *C. Support Facilities*

In addition to schools, the District owns and operates additional facilities which provide operational support functions to the schools. An inventory of these facilities is provided in Table 5.

## Table 5
## Support Facility Inventory

| Facility | Building Area (Square Feet) | Site Location |
|---|---|---|
| Administration and Special Programs | 21,402 | Roosevelt Building, Presidents |
| Transportation | 41,550 | Leased |
| Maintenance | 4,624 | Presidents |
| Warehouse | 5,000 | Presidents |

## *D. Land Inventory*

The District owns the following undeveloped sites:

- a 26-acre site intended for use as an elementary school located on the west side of the intersection of Highway 9 and Eaglefield Drive;
- a 180-acre site ("Boettcher Site") located 1.5 miles from the city limits of Arlington adjacent to SR 530 and intended for use as a school and/or sports fields. Utility and road access is a concern;
- seven sites ranging from 25 to 160 acres that are managed as forest land by the Vocational Agricultural Department and generally topographically unsuitable for school site development; and
- an additional 58.9 acres at the Post Middle School site of farmland located in a floodplain and therefore unsuitable for development.

The District has an option to purchase the following undeveloped site:

- a 54-acre site intended for use as a high school located on the east side of the intersection of Highway 9 and Eaglefield Drive.

Except for one rental house, the District does not own any sites which are developed for uses other than schools and/or which are leased to other parties.

## SECTION 4
## STUDENT ENROLLMENT PROJECTIONS

### *A. Projected Student Enrollment 2000-2005*

Enrollment projections are most accurate for the initial years of the forecast period. The District uses the methodology from the Office of Superintendent of Public Instruction to determine enrollment projections. The cohort survival method uses historical enrollment data to forecast the number of students who will be attending school the following year. It uses a weighted average of the most recent years to project enrollment.

Based on this methodology, a total of 688 FTE students are expected to be added to the District by 2005, an increase of 14.6% over 2000 enrollment levels.

OFM population-based enrollment projections were estimated for the District using OFM population forecasts for the County. Between 1990 and 1999, the District's enrollment constituted 21% of the total population in the District. Assuming that between 2000 and 2005, the District's enrollment will constitute 21% of the District's total population and using OFM/County data, a total enrollment of 5,336 FTEs is projected in 2005. *See* Appendix A.

**Table 6**
**Projected Student Enrollment**
**1999-2005**

| Projection | 1999* | 2000 | 2001 | 2002 | 2003 | 2004 | 2005 | Change 1999-05 | Percent Change 1999-05 |
|---|---|---|---|---|---|---|---|---|---|
| OFM/County | 4,717 | 4,762 | 4,870 | 4,977 | 5,085 | 5,253 | 5,336 | 619 | 13.1% |
| District | 4,717 | 4,876 | 4,964 | 5,107 | 5,207 | 5,294 | 5,405 | 688 | 14.6% |

* October 1999 FTE

## *B. 2012 Enrollment Projections*

Student enrollment projections beyond 2005 are highly speculative. Based on OFM/County data for 2005 and an estimated student-to-population ratio of 21%, 5,960 FTE students are projected for 2012. The total enrollment estimate was broken down by grade span to evaluate long-term site acquisition needs for elementary, middle, and high school facilities. Enrollment by grade span was determined based on recent and projected enrollment trends at the elementary, middle school, and high school levels.

Projected enrollment by grade span for the year 2012 is provided in Table 7. Again, these estimates are highly speculative and are used only for general planning purposes.

**Table 7**
**Projected Student Enrollment**
**(Ratio Method – OFM)**
**2012**

| Grade Span | Projected Enrollment |
|---|---|
| Elementary (K-6) | 2,815 |
| Middle School (7-8) | 1,009 |
| High School (9-12) | 2,136 |
| **TOTAL (K-12)** | 5,960 |

[1] Snohomish County Planning and Development Service provided the underlying data for the 2012 projections.

## SECTION 5
## CAPITAL FACILITIES NEEDS

Projected available student capacity was derived by subtracting projected student enrollment from existing school capacity (excluding relocatable classrooms) for each of the six years in the forecast period (2000-2005). Capacity needs are expressed in terms of "unhoused students." The method used to define future capacity needs assumes that

- A new high school housing 1,600 students will start construction in 2001;
- A new elementary school housing 600 students will start construction in 2001; and
- Conversion of the existing high school to a middle school facility housing 550 students will occur in 2004.

By the end of the six-year forecast period (2005), additional classroom capacity will be needed as follows:

| Grade Span | Unhoused Students |
|---|---|
| Elementary (K-6) | 0 |
| Middle School (7-8) | 0 |
| High School (9-12) | (327) |
| **TOTAL (K-12)** | (327) |

Projected future capacity needs are depicted on Table 8. They are derived by applying the projected number of students to the projected capacity. Planned improvements by the District through 2005 are included in Table 8. It is not the District's policy to include relocatable classrooms when determining future capital facility needs; therefore interim capacity provided by relocatable classrooms is not included. (Information on relocatable classrooms and interim capacity can be found in Table 4. Information on planned construction projects can be found in the Financing Plan, Table 9.)

## Table 8
## Projected Student Capacity
## 2000-2005

### Elementary School Surplus/Deficiency

| | 2000 | 2001 | 2002 | 2003 | 2004 | 2005 |
|---|---|---|---|---|---|---|
| Existing Capacity | 2,215 | 2,215 | 2,815 | 2,815 | 2,815 | 2,815 |
| Added Capacity | | 600 | | | | |
| Total Capacity | 2,215 | 2,815 | 2,815 | 2,815 | 2,815 | 2,815 |
| Enrollment | 2,382 | 2,426 | 2,450 | 2,492 | 2,537 | 2,557 |
| Surplus (Deficiency) | (167) | 389 | 365 | 323 | 278 | 258 |

### Middle School Surplus/Deficiency

| | 2000 | 2001 | 2002 | 2003 | 2004 | 2005 |
|---|---|---|---|---|---|---|
| Existing Capacity | 899 | 899 | 899 | 899 | 899 | 1,449 |
| Added Capacity | | | | | 550 | |
| Total Capacity | 899 | 899 | 899 | 899 | 1,449 | 1,449 |
| Enrollment | 807 | 849 | 872 | 891 | 885 | 921 |
| Surplus (Deficiency) | 92 | 50 | 27 | 8 | 564 | 528 |

### High School Surplus/Deficiency

| | 2000 | 2001 | 2002 | 2003 | 2004 | 2005 |
|---|---|---|---|---|---|---|
| Existing Capacity | 1,140 | 1,140 | 1,140* | 1,600 | 1,600 | 1,600 |
| Added Capacity | | | 1,600 | | | |
| Total Capacity | 1,140 | 1,140 | 1,600 | 1,600 | 1,600 | 1,600 |
| Enrollment | 1,687 | 1,689 | 1,785 | 1,824 | 1,872 | 1,927 |
| Surplus (Deficiency) | (547) | (549) | (185) | (224) | (272) | (327) |

* When the new high school comes on line, the existing Arlington High School will no longer serve as a high school facility

## SECTION 6
## CAPITAL FACILITIES FINANCING PLAN

### *A. Planned Improvements*

At the time of preparation of this Plan, two projects are in the final stages of design and one project is being developed. In March 2000, the voters passed a $54 million bond issue for school construction and site acquisition. The bond and the state match are anticipated to fund the following projects:

Capacity Adding Projects:

- construction of a new high school housing a total of 1,600 students;
- construction of a new elementary school housing 600 students; and
- conversion of the existing high school to a middle school facility housing 550 students.

Non-Capacity Projects:

- Modernization of Presidents Elementary School.

In the event that planned construction projects do not fully address space needs for student growth and a reduction in interim student housing, the Board could consider various courses of action, including, but not limited to:

- alternative scheduling options;
- changes in the instructional model;
- grade configuration changes;
- increased class sizes; or
- modified school calendar.

Funding for planned improvements is typically secured from a number of sources including voter approved bonds, State Match funds, and impact fees. Each of these funding sources is discussed in greater detail below.

### *B. Financing for Planned Improvements*

#### *1. General Obligation Bonds*

Bonds are typically used to fund construction of new schools and other capital improvement projects. A 60% voter approval is required to approve the issuance of bonds. Bonds are then retired through collection of property taxes. In March 2000, the voters passed a $54 million bond issue for school construction and

site acquisition. The funds from this bond will be the primary source of funding for the capital improvement projects listed in this Plan.

### *2. State Match Funds*

State Match funds come from the Common School Construction Fund (the "Fund"). Bonds are sold on behalf of the Fund, and then retired from revenues accruing predominantly from the sale of timber from common school lands. If these sources are insufficient, the Legislature can appropriate funds or the State Board of Education can change the standards. School districts may qualify for State Match funds for specific capital projects based on a prioritization system. Based on the District's assessed valuation per student and the formula in the state regulations, the District is currently eligible for State Match funds for a number of school construction projects at the 61.77% match level. However, the District does not qualify for State Match for the new elementary school.

### *3. Impact Fees*

Impact fees are a means of supplementing traditional funding sources for construction of public facilities needed to accommodate new development. School impact fees are generally collected by the permitting agency at the time plats are approved or building permits are issued.

### *4. Six-Year Financing Plan*

Table 9 demonstrates how the District intends to fund new construction and improvements to school facilities for the years 2000-2005. The financing components include a bond issue, impact fees, and State Match funds. Projects and portions of projects which remedy existing deficiencies are not appropriate for impact fee funding. Thus, impact fees will not be used to finance projects or portions of projects which do not add capacity or which remedy existing deficiencies.

# Table 9
## Capital Facilities Financing Plan

### Improvements Adding Permanent Capacity (Costs in Millions)

| Project | 2000 | 2001 | 2002 | 2003 | 2004 | 2005 | Total Cost | Bonds/ Levy | State Match | Impact Fees[1] | Future Sources |
|---|---|---|---|---|---|---|---|---|---|---|---|
| Elementary | | | | | | | | | | | |
| Site Acquisition | | 1.00 | | | | | 1.00 | | | | |
| New School Construction | | 9.00 | | | | | 9.00 | X | | X | |
| Middle School | | | | | | | | | | | |
| Renovated School | | | | | | 6.00 | 6.00 | X | X | X | |
| High School | | | | | | | | | | | |
| Site Acquisition | | 2.50 | | | | | 2.50 | | | | |
| New High School Construction | | 41.50 | | | | | 41.50 | X | X | X | |

### Improvements Adding Temporary Capacity (Costs in Millions)

| Project | 2000 | 2001 | 2002 | 2003 | 2004 | 2005 | Total Cost | Bonds/ Levy | State Match | Impact Fees | Future Sources |
|---|---|---|---|---|---|---|---|---|---|---|---|
| Elementary | | | | | | | | | | | |
| Kent Prairie | .05 | .05 | | | | | .10 | X | | X | |

### Improvements Not Adding Capacity (Costs in Millions)

| Project | 2000 | 2001 | 2002 | 2003 | 2004 | 2005 | Total Cost | Bonds/ Levy | State Match | Impact Fees | Future Sources |
|---|---|---|---|---|---|---|---|---|---|---|---|
| Districtwide Improvements | | | | | | | | | | | |
| Modernization of Presidents Elementary | | | | | | 9.00 | 9.00 | X | X | | |

### Totals (Costs in Millions)

| | 2000 | 2001 | 2002 | 2003 | 2004 | 2005 | Total Cost | Bonds/ Levy | State Match | Impact Fees | Future Sources |
|---|---|---|---|---|---|---|---|---|---|---|---|
| Elementary | .05 | 10.05 | | | | | 10.10 | X | X | X | |
| Middle School | | | | | | 6.00 | 6.00 | X | X | X | |
| High School | | 44.00 | | | | | 44.00 | X | X | X | |
| Districtwide Improvements | | | | | | 9.00 | 9.00 | | | | |
| TOTAL | .05 | 54.05 | | | | 15.00 | 69.10 | X | X | X | |

[1] Where specific amounts are shown, the District has already collected and intends to allocate such amounts to such projects. Where no specific amount is shown, the district anticipates collecting and allocating some amount to each project. When more data is available, the District will allocate specific amounts to such projects.

[2] Projected construction costs were provided by the District's architects.

## SECTION 7
## SCHOOL IMPACT FEES

The GMA authorizes jurisdictions to collect impact fees to supplement funding of additional public facilities needed to accommodate new development. Impact fees cannot be used for the operation, maintenance, repair, alteration, or replacement of existing capital facilities used to meet existing service demands.

### *A. School Impact Fees*

The County's and the City's impact fee programs require school districts to prepare and adopt CFPs meeting the specifications of the GMA. Impact fees are calculated in accordance with the formula, which are based on projected school facility costs necessitated by new growth and are contained in the District's CFP.

### *B. Methodology and Variables Used to Calculate School Impact Fees*

Impact fees have been calculated utilizing the formula in the Snohomish County Impact Fee Ordinance. The resulting figures are based on the District's cost per dwelling unit to purchase land for school sites, make site improvements, construct schools, and purchase/install relocatable facilities that add interim capacity needed to serve new development. As required under the GMA, credits have also been applied in the formula to account for State Match funds to be reimbursed to the District and projected future property taxes to be paid by the dwelling unit.

## FACTORS FOR ESTIMATED IMPACT FEE CALCULATIONS

| | | |
|---|---|---|
| **Student Generation Factors – Single Family** | | |
| Elementary | | .332 |
| Middle | | .096 |
| Senior | | .158 |
| **Total** | | **.586** |
| **Student Generation Factors – Multi Family (1 Bdrm)** | | |
| Elementary | | .211 |
| Middle | | .000 |
| Senior | | .053 |
| **Total** | | **.263** |
| **Student Generation Factors – Multi Family (2+ Bdrm)** | | |
| Elementary | | .217 |
| Middle | | .059 |
| Senior | | .100 |
| **Total** | | **.376** |
| **Projected Student Capacity per Facility** | | |
| Elementary | | 600 |
| Middle | | 550 |
| Senior | | 1,600 |
| **Required Site Acreage per Facility** | | |
| Elementary | | 26.0 |
| Middle | | 0.0 |
| Senior | | 54.0 |
| **New Facility Construction Cost/Average** | | |
| Elementary | | $9,000000 |
| Middle | | $6,000,000 |
| Senior | | $41,500,000 |
| **Permanent Facility Square Footage** | | |
| Elementary | | 185,402 |
| Middle | | 77,663 |
| Senior | | 136,875 |
| **Total** | **92.65%** | **399,940** |
| **Temporary Facility Square Footage** | | |
| Elementary | | 14,116 |
| Middle | | 4,480 |
| Senior | | 13,148 |
| **Total** | **7.35%** | **31,744** |
| **Total Facility Square Footage** | | |
| Elementary | | 199,518 |
| Middle | | 82,143 |
| Senior | | 150,023 |
| **Total** | **100.00%** | **431,684** |

| | |
|---|---|
| **Average Site Cost/Acre** | |
| Elementary | $38,462.00 |
| Middle | 0.00 |
| Senior | $47,222.00 |
| **Temporary Facility Capacity** | |
| Capacity | 27 |
| Cost | $50,000.00 |
| **State Match Credit** | |
| Current State Match Percentage | 61.77% |
| **Boeckh Index Factor** | |
| High School/Elementary Boeckh Index | 101.03 |
| Middle School Boeckh Index | 80.82 |
| **District Average Assessed Value** | |
| Single Family Residence | $149,600 |
| **District Average Assessed Value** | |
| Multi Family (1 Bedroom) | $43,653 |
| **District Average Assessed Value** | |
| Multi Family (2+ Bedroom) | $62,622 |
| **SPI Square Footage per Student** | |
| Elementary | 0 |
| Middle | 110 |
| Senior | 120 |
| **District Debt Service Tax Rate** | |
| Current/$1,000 | $2.74 |
| **General Obligation Bond Interest Rate** | |
| Current Bond Buyer Index | 6.08% |
| **Developer Provided Sites/Facilities** | |
| Value | 0 |
| Dwelling Units | 0 |

Note: The total costs of the school construction projects and the total capacities are shown in the fee calculations. However, new development will only be charged for the system improvements needed to serve new growth.

## C. *Proposed Arlington School District Impact Fee Schedule*

Using the variables and formula described in subsection B, impact fees proposed for the District are summarized in Table 10. See also Appendix C.

**Table 10**
**School Impact Fees**
**2000**

| Housing Type | Impact Fee Per Dwelling Unit |
|---|---|
| Single Family | $2,758 |
| Multi-Family (1 Bedroom) | $1,698 |
| Multi-Family (2+ Bedroom) | $2,117 |

# APPENDIX A

## POPULATION AND ENROLLMENT DATA

## APPENDIX A

## PROJECTED STUDENT ENROLLMENT 2000-2005
## (District Estimate, Cohort Survival Method)

| School Type | Grade Level | SCHOOL YEAR 1999 | 2000 | 2001 | 2002 | 2003 | 2004 | 2005 |
|---|---|---|---|---|---|---|---|---|
| Elementary | K | 306 | 311 | 316 | 321 | 326 | 331 | 336 |
| | 1 | 349 | 339 | 345 | 350 | 356 | 361 | 367 |
| | 2 | 338 | 363 | 352 | 358 | 364 | 370 | 375 |
| | 3 | 350 | 353 | 379 | 368 | 374 | 380 | 387 |
| | 4 | 387 | 378 | 381 | 409 | 398 | 404 | 410 |
| | 5 | 374 | 400 | 391 | 394 | 423 | 412 | 418 |
| | 6 | 398 | 393 | 420 | 410 | 414 | 444 | 432 |
| Middle | 7 | 374 | 421 | 415 | 444 | 433 | 438 | 469 |
| | 8 | 424 | 386 | 434 | 428 | 458 | 447 | 452 |
| Senior High | 9 | 506 | 552 | 502 | 565 | 557 | 596 | 582 |
| | 10 | 386 | 434 | 473 | 431 | 485 | 478 | 511 |
| | 11 | 395 | 359 | 403 | 440 | 401 | 451 | 444 |
| | 12 | 283 | 342 | 311 | 349 | 381 | 347 | 390 |
| Grades K-6 Headcount (1) | | 2,502 | 2,537 | 2,584 | 2,610 | 2,655 | 2,702 | 2,725 |
| Grades K-6 FTE (2) | | 2,349 | 2,382 | 2,426 | 2,450 | 2,492 | 2,537 | 2,557 |
| Grades 7-8 Headcount (1) | | 798 | 807 | 849 | 872 | 891 | 885 | 921 |
| Grades 9-12 Headcount (1) | | 1,570 | 1,687 | 1,689 | 1,785 | 1,824 | 1,872 | 1,927 |
| Grades K-12 Headcount (1) | | 4,870 | 5,031 | 5,122 | 5,267 | 5,370 | 5,459 | 5,573 |
| Grades K-12 FTE (2) | | 4,717 | 4,876 | 4,964 | 5,107 | 5,207 | 5,294 | 5,405 |

Source: Arlington School District

Notes: (1) Actual student headcount enrollment as of October 1, 1999.
(2) Assumes half-day attendance for kindergarten students.

## APPENDIX A

## AVERAGE PERCENTAGE ENROLLMENT BY GRADE SPAN

| Enrollment by Grade Span | 1999 | 2000 | 2001 | 2002 | 2003 | 2004 | 2005 |
|---|---|---|---|---|---|---|---|
| Elementary (K-6) | 2,349 | 2,382 | 2,426 | 2,450 | 2,492 | 2,537 | 2,557 |
| Middle School (7-8) | 798 | 807 | 849 | 872 | 891 | 885 | 921 |
| High School (9-12) | 1,570 | 1,687 | 1,689 | 1,785 | 1,824 | 1,872 | 1,927 |
| **TOTAL** | 4,717 | 4,876 | 4,964 | 5,107 | 5,207 | 5,294 | 5,405 |

| Percentage by Grade Span | 1999 | 2000 | 2001 | 2002 | 2003 | 2004 | 2005 |
|---|---|---|---|---|---|---|---|
| Elementary (K-6) | 49.80% | 48.85% | 48.87% | 47.97% | 47.86% | 47.92% | 47.31% |
| Middle School (7-8) | 16.92% | 16.55% | 17.10% | 17.07% | 17.11% | 16.72% | 17.04% |
| High School (9-12) | 33.28% | 34.60% | 34.02% | 34.95% | 35.03% | 35.36% | 35.65% |
| **TOTAL** | 100% | 100% | 100% | 100% | 100% | 100% | 100% |

| Average Percentage by Grade Span | |
|---|---|
| Elementary (K-6) | 48.37% |
| Middle School (7-8) | 16.93% |
| High School (9-12) | 34.70% |
| **TOTAL** | **100.00%** |

# APPENDIX B

# STUDENT GENERATION FACTOR REVIEW

## APPENDIX B

### STUDENT GENERATION RATES (SGR)

The 2000 Arlington School District Student Generation Rates (SGR) for both single family and multi family, as specified by Snohomish County Code, have been determined as outlined below. The rates have been calculated for three types of residential development: single family, multi-family units with one bedroom, and multi-family units with two or more bedrooms. A survey was conducted that included all of the territory within the boundaries of the Arlington School District. The analysis was based on projects permitted from 1992 to 1999. The primary sources of information were Snohomish County, the City of Arlington, and the Arlington School District.

The process of analysis involved gathering the residential development data from 1992 to 1999 from the County. This County data included all new development for unincorporated Snohomish County and the City of Arlington that is within the Arlington School District boundary lines. The County data used is from the Metroscan data base. Metroscan is a commercial database product derived from the Snohomish County Assessor's files. The District supplemented these data by collecting additional information. Specific information required was the discrete apartment address and the number of bedrooms in each multi-family unit. A comparison of the street addresses of the new developments with the addresses of each of the District's students from the 1999-2000 school year produced a record of each unit occupied by a student. This information was aggregated into the three grade groupings, and produced the student generation rates for each type of residential development specified above.

# APPENDIX C

## SCHOOL IMPACT FEE CALCULATIONS

**SCHOOL IMPACT FEE CALCULATIONS**

| | |
|---|---|
| DISTRICT | Arlington School District |
| YEAR | 2000 |

**School Site Acquisition Cost:**
((AcresxCost per Acre)/Facility Capacity)xStudent Generation Factor

| | Facility Acreage | Cost/ Acre | Facility Capacity | Student Factor SFR | Student Factor MFR (1) | Student Factor MFR (2+) | Cost/ SFR | Cost/ MFR (1) | Cost/ MFR (2+) |
|---|---|---|---|---|---|---|---|---|---|
| Elementary | 26.00 | $ 38,462.00 | 600 | 0.332 | 0.211 | 0.217 | $553 | $352 | $362 |
| Middle | 0.00 | | 550 | 0.096 | 0.000 | 0.059 | $0 | $0 | $0 |
| High | 54.00 | $ 47,222.00 | 1,600 | 0.158 | 0.053 | 0.100 | $252 | $84 | $159 |
| | | | | | | TOTAL | $805 | $436 | $521 |

**School Construction Cost:**
((Facility Cost/Facility Capacity)xStudent Generation Factor)x(permanent/Total Sq Ft)

| | %Perm/ Total Sq.Ft. | Facility Cost | Facility Capacity | Student Factor SFR | Student Factor MFR (1) | Student Factor MFR (2+) | Cost/ SFR | Cost/ MFR (1) | Cost/ MFR (2+) |
|---|---|---|---|---|---|---|---|---|---|
| Elementary | 92.65% | $ 9,000,000 | 600 | 0.332 | 0.211 | 0.217 | $4,614 | $2,932 | $3,016 |
| Middle | 92.65% | $ 6,000,000 | 550 | 0.096 | 0.000 | 0.059 | $970 | $0 | $596 |
| High | 92.65% | $ 41,500,000 | 1,600 | 0.158 | 0.053 | 0.100 | $3,797 | $1,274 | $2,403 |
| | | | | | | TOTAL | $9,381 | $4,206 | $6,015 |

**Temporary Facility Cost:**
((Facility Cost/Facility Capacity)xStudent Generation Factor)x(Temporary/Total Square Feet)

| | %Temp/ Total Sq.Ft. | Facility Cost | Facility Size | Student Factor SFR | Student Factor MFR (1) | Student Factor MFR (2+) | Cost/ SFR | Cost/ MFR (1) | Cost/ MFR (2+) |
|---|---|---|---|---|---|---|---|---|---|
| Elementary | 7.35% | $ 50,000.00 | 27 | 0.332 | 0.211 | 0.217 | $45 | $29 | $30 |
| Middle | 7.35% | $ - | 27 | 0.096 | 0.000 | 0.059 | $0 | $0 | $0 |
| High | 7.35% | $ - | 27 | 0.158 | 0.053 | 0.100 | $0 | $0 | $0 |
| | | | | | TOTAL | | $45 | $29 | $30 |

**State Matching Credit:**
Boeckh Index X SPI Square Footage X District Match % X Student Factor

| | Boeckh Index | SPI Footage | District Match % | Student Factor SFR | Student Factor MFR (1) | Student Factor MFR (2+) | Cost/ SFR | Cost/ MFR (1) | Cost/ MFR (2+) |
|---|---|---|---|---|---|---|---|---|---|
| Elementary | $ 101.03 | 0 | 61.77% | 0.332 | 0.211 | 0.217 | $0 | $0 | $0 |
| Middle | $ 80.82 | 110 | 61.77% | 0.096 | 0.000 | 0.059 | $527 | $0 | $324 |
| Sr. High | $ 101.03 | 120 | 61.77% | 0.158 | 0.053 | 0.100 | $1,183 | $397 | $749 |
| | | | | | TOTAL | | $1,710 | $397 | $1,073 |

| **Tax Payment Credit:** | SFR | MFR (1) | MFR (2+) |
|---|---|---|---|
| Average Assessed Value | $149,600 | $43,653 | $62,622 |
| Capital Bond Interest Rate | 6.08% | 6.08% | 6.08% |
| Net Present Value of Average Dwelling | $1,096,908 | $320,075 | $459,158 |
| Years Amortized | 10 | 10 | 10 |
| Property Tax Levy Rate | $2.74 | $2.74 | $2.74 |
| Present Value of Revenue Stream | $3,006 | $877 | $1,258 |

| **Fee Sumary:** | Single Family | Multi-Family (1) | Multi-Family (2+) |
|---|---|---|---|
| Site Acquistion Costs | $805 | $436 | $521 |
| Permanent Facility Cost | $9,381 | $4,206 | $6,015 |
| Temporary Facility Cost | $45 | $29 | $30 |
| State Match Credit | ($1,710) | ($397) | ($1,073) |
| Tax Payment Credit | ($3,006) | ($877) | ($1,258) |
| FEE (AS CALCULATED) | $5,516 | $3,397 | $4,235 |
| FEE (AS DISCOUNTED) | $2,758 | $1,698 | $2,117 |

Exhibit B

# MARYSVILLE SCHOOL DISTRICT NO. 25

## CAPITAL FACILITIES PLAN

## 2000-2005

*"Marysville School District ... developing self-directed, lifelong learners."*

*Adopted April 17, 2000*

# MARYSVILLE SCHOOL DISTRICT NO. 25

## CAPITAL FACILITIES PLAN

## 2000-2005

*"Marysville School District ... developing self-directed, lifelong learners."*

### *BOARD OF DIRECTORS*

Donald Hatch Jr.
Mark Johnson
Helen Mount
Erik Olson
Cary Peterson

### *SUPERINTENDENT*

Dr. Richard Eisenhauer

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For information regarding the Marysville School District 2000-2005 Capital Facilities Plan, contact Larry Price, Marysville School District No. 25, 4220 80th Street N.E., Marysville, Washington 98270-3498. Telephone: (360) 653-0844. E-Mail: Larry_Price@msvl.wednet.edu.

# *INTRODUCTION*

### *Overview of the Marysville School District*

The Marysville School District (the "District") encompasses most of the City of Marysville, a small portion of the City of Everett, and portions of unincorporated Snohomish County. The District's boundaries also include the Tulalip Indian Reservation. The District encompasses a total of 72 square miles.

The District currently serves a student population of 11,467 (October 1, 1999) with ten elementary schools (grades K-5), three middle level schools (one with grades 6-7, one with grades 8-9, and one with grades 6-8), and one high school (grades 9-12). In addition, the District operates several specialized schools and one alternative high school. For the purposes of facility planning, this Capital Facilities Plan (the "CFP") considers grades K-5 as elementary school, grades 6-9 as middle level school, and grades 10-12 as high school in 2000. In 1999, the District moved approximately 400 9th graders to Marysville Pilchuck High School and approximately 500 9th graders remain at Marysville Junior High School. The District plans to shift all remaining 9th graders from the middle level schools to the high school in 2004, when the second high school is opened.

The District currently faces significant challenges related to the capacity and the condition of its facilities. Of particular concern is the capacity of its schools to accommodate growth at the elementary school level in certain areas of the District, and at the middle level and high school level throughout the District. Also of concern is the condition of its facilities. All schools need technology upgrades. Five elementary schools (Cascade, Liberty, Pinewood, Sunnyside and Tulalip), one middle level school (Marysville Middle School), and the high school (Marysville-Pilchuck High School) need to be remodeled. Support facilities, especially regional kitchens and administrative offices, need additional space.

### *Purpose of the Capital Facilities Plan*

The Washington State Growth Management Act (the "GMA") outlines 13 broad goals including adequate provision of necessary public facilities and services. Schools are among these necessary facilities and services. School districts have adopted capital facilities plans to satisfy the requirements of RCW 36.70A.070 and to identify additional school facilities necessary to meet the educational needs of the growing student populations anticipated in their districts.

The District has prepared this CFP to provide Snohomish County (the "County"), the City of Marysville (the "City"), and the City of Everett ("Everett") with a schedule and financing program for capital improvements over the next six years (2000-2005).

In accordance with the Growth Management Act, adopted County policy, Snohomish County Ordinance Nos. 97-095 and 99-107, and the City of Marysville Ordinance Nos. 2306 and 2213, this CFP contains the following required elements:

- Future enrollment forecasts for each grade span (elementary schools, middle level schools, and high schools).
- An inventory of existing capital facilities owned by the District, showing the locations and capacities of the facilities.
- A forecast of the future needs for capital facilities and school sites.
- The proposed capacities of expanded or new capital facilities.
- A six-year plan for financing capital facilities within projected funding capacities, which clearly identifies sources of public money for such purposes. The financing plan separates projects and portions of projects which add capacity from those which do not, since the latter are generally not appropriate for impact fee funding.
- A calculation of impact fees to be assessed and support data substantiating said fees.

In developing this CFP, the District followed the following guidelines set forth in Appendix F of Snohomish County's General Policy Plan:

- Districts should use information from recognized sources, such as the U.S. Census or the Puget Sound Regional Council. School districts may generate their own data if it is derived through statistically reliable methodologies. Information must not be inconsistent with Office of Financial Management (OFM) population forecasts. Student generation rates must be independently calculated by each school district.
- The CFP must comply with the GMA.
- The methodology used to calculate impact fees must comply with Chapter 82.02 RCW. The CFP must identify alternative funding sources in the event that impact fees are not available due to action by the state, county or cities within the District.

# School Locations

## Administrative Offices:

Marysville School District No. 25
4220 - 80th St. NE, Marysville, WA 98270
360/653-7058 • Fax 360/653-9707

**Schools of the District:**

### Grades K-5

1. **Cascade Elementary**
   5200 - 100th St. NE ..... 653-0620

2. **Kellogg Marsh Elementary**
   6329 - 91st NE ..... 653-0643

3. **Liberty Elementary**
   1919 - 10th St. ..... 653-0625

4. **Marshall Elementary**
   4407 - 116th St. NE ..... 653-0630

5. **Pinewood Elementary**
   5115 - 84th St. NE ..... 653-0635

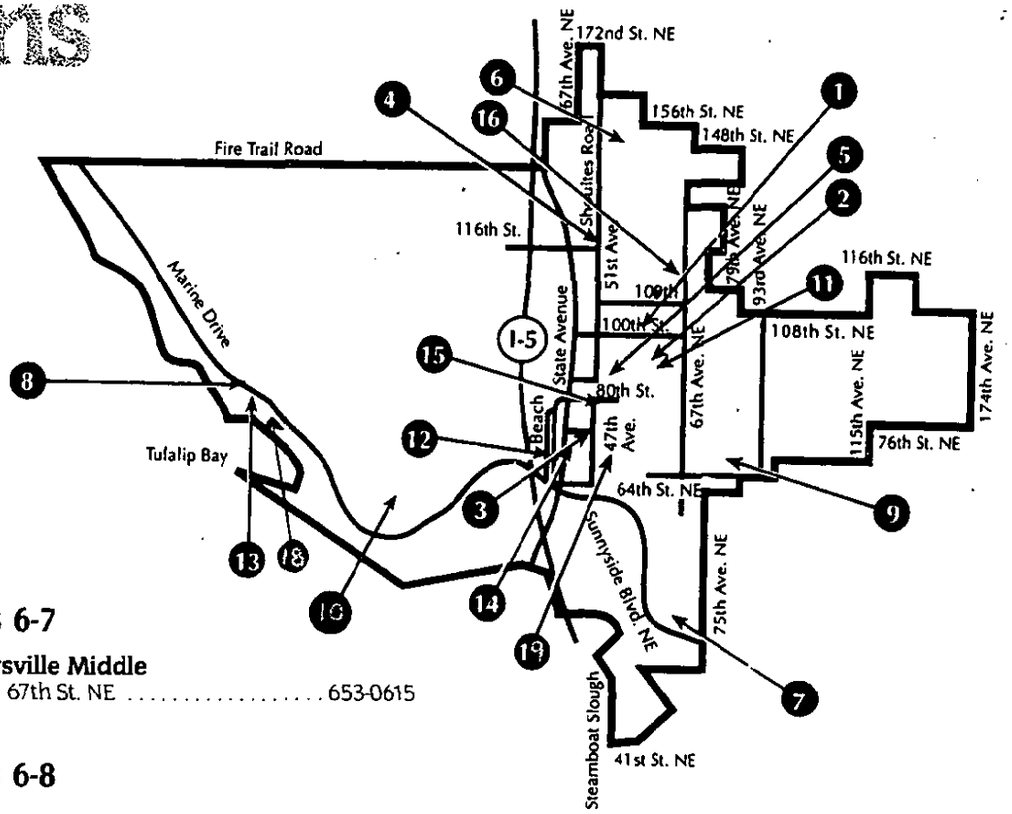
6. **Shoultes Elementary**
   13525 - 51st Ave. NE ..... 653-0640

7. **Sunnyside Elementary**
   3619 Sunnyside NE ..... 653-0645

8. **Tulalip Elementary**
   7730 - 36th Ave. NW ..... 653-0650

9. **Allen Creek Elementary**
   6505 - 60th Dr. NE ..... 653-0660

10. **Quil Ceda Elementary**
    2415 - 74th St. NE ..... 653-0890




### Grades 6-7

19. **Marysville Middle**
    4923 - 67th St. NE ..... 653-0615

### Grades 6-8

11. **Cedarcrest School**
    6400 - 88th St. NE ..... 653-0850

12. **Tenth Street School**
    1010 Beach St. ..... 653-0665

13. **Tulalip Option School**
    7611 Totem Beach Rd. ..... 653-0669

### Grades 8-9

14. **Marysville Junior High**
    1605 - 7th St. NE ..... 653-0610

### Grades 9-12

18. **Tulalip Learning Center**
    6700 Totem Beach Rd. ..... 653-0690

15. **Marysville Alternative High School**
    4317 - 76th St. NE ..... 653-0628

16. **Marysville-Pilchuck High**
    5611 - 108th St. NE ..... 653-0600

## *EDUCATIONAL PROGRAM STANDARDS*

School facility and student capacity needs are dictated by the types and amounts of space required to accommodate the District's adopted educational program. The educational program standards which typically drive facility space needs include grade configuration, optimum facility size, class size, educational program offerings, classroom utilization and scheduling requirements, and use of relocatable classrooms (portables).

In addition to student population, other factors such as collective bargaining agreements, government mandates, and community expectations also affect classroom space requirements. Traditional educational programs are often supplemented by programs such as special education, remediation, alcohol and drug education, computer labs, music, art, and other programs. These programs can have a significant impact on the available student capacity of school facilities.

District educational program standards may change in the future as a result of changes in the program year, special programs class sizes, grade span configurations, and use of new technology, as well as other physical aspects of the school facilities. The school capacity inventory will be reviewed periodically and adjusted for any changes to the educational program standards. These changes will also be reflected in future updates of this CFP.

The District educational program standards which directly affect school capacity are outlined below for the elementary, middle level, and high schools.

### *Elementary Schools*

- Class size for Kindergarten should not exceed 22 students.
- Class size for grades 1-3 should not exceed 23 students.
- Class size for grades 4-5 should not exceed 26 students.
- Special education for students may be provided in regular classes when inclusion is possible and in self-contained classrooms when this is the most appropriate option available.

*Middle Level Schools and High Schools*

- Class size for grades 6-9 should not exceed 24 students.
- Class size for grades 10-12 should not exceed 29 students.
- It is not possible to achieve 100% utilization of all regular teaching stations throughout the day. Therefore, classroom capacity should be adjusted using a utilization factor of 95% depending on the physical characteristics of the middle level school and high school facilities.
- Special education for students may be provided in regular classes when inclusion is possible and in self-contained classrooms when this is the most appropriate option available.
- Identified students will also be provided other programs in Resource Rooms (i.e., computer labs, study rooms), and Program Specific Classrooms (i.e., music, drama, art, home and family education).

## *CAPITAL FACILITIES INVENTORY*

Under the GMA, public entities are required to inventory capital facilities used to serve existing development. The purpose of the facilities inventory is to establish a baseline for determining what facilities will be required to accommodate future demand (student enrollment) at acceptable levels of service. This section provides an inventory of capital facilities owned and operated by the District including schools, relocatable classrooms (portables), undeveloped land, and support facilities. School facility capacity was inventoried based on the space required to accommodate the District's adopted educational program standards. *See* Educational Program Standards. A map showing locations of District facilities is provided as Figure 1.

### *Schools*

The District maintains ten elementary schools, three middle level schools, and one high school. In addition, the District operates several specialized schools (The Co-op School, Tenth Street School, Tulalip Option School, and Tulalip Learning Center) and one alternative high school (Marysville Alternative High School). Currently, elementary schools accommodate grades K-5 (except for two elementary school with 6$^{th}$ grade programs), middle level schools serve grades 6-9, and the high school provides for grades 9-12. In 1999, the District moved approximately 400 9$^{th}$ graders to Marysville Pilchuck High School when the 9$^{th}$ grade annex was opened. Approximately 500 9$^{th}$ graders remain at Marysville Junior High School. In 2004, the District plans to shift all 9$^{th}$ grade students from the middle schools to the high schools, when the second high school is opened.

School capacity was determined based on the number of teaching stations within each building and the space requirements of the District's adopted educational program. It is this capacity calculation that is used to establish the District's baseline capacity, and to determine future capacity needs based on projected student enrollment. The school capacity inventory is summarized in Tables 1, 2, and 3.

### *Relocatable Classrooms (Portables)*

Relocatable classrooms (portables) are used as interim classroom space to house students until funding can be secured to construct permanent classrooms. The District currently uses 95 relocatable classrooms at various school sites throughout the District to provide additional interim capacity. A typical relocatable classroom can provide capacity for a full-size class of students. Current use of relocatable classrooms throughout the District is summarized in Table 4.

*Table 1*
*Elementary School Inventory*

| *Elementary School* | *Site Size (Acres)* | *Building Area (Square Feet)* | *Other Stations* | *Teaching Stations** | *Permanent Capacity* |
|---|---|---|---|---|---|
| Allen Creek | 11.0 | 47,594 | 0 | 24.0 | 576 |
| Cascade | 9.5 | 38,923 | 0 | 17.0 | 408 |
| Kellogg Marsh | 12.8 | 47,816 | 1 | 23.0 | 552 |
| Liberty | 9.1 | 40,459 | 1 | 17.0 | 408 |
| Marshall | 13.7 | 53,063 | 0 | 26.0 | 624 |
| Pinewood | 10.5 | 40,073 | 0 | 20.0 | 480 |
| Quil Ceda | 10.0 | 45,690 | 0 | 22.0 | 528 |
| Shoultes | 9.5 | 40,050 | 0 | 21.0 | 504 |
| Sunnyside | 10.4 | 39,121 | 0 | 22.0 | 528 |
| Tulalip | 10.0 | 41,530 | 0 | 22.0 | 528 |
| *TOTAL* | 106.5 | 434,319 | 2 | 214.0 | 5,136 |

*Table 2*
*Middle Level School Inventory*

| *Middle Level School* | *Site Size (Acres)* | *Building Area (Square Feet)* | *Other Stations* | *Teaching Stations** | *Permanent Capacity* |
|---|---|---|---|---|---|
| Cedarcrest (6-9) | 27.0 | 83,128 | 0 | 29.0 | 661 |
| Marysville Jr Hi (8-9) | 15.2 | 125,165 | 0 | 39.0 | 889 |
| Marysville Mid (6-7) | 21.0 | 99,617 | 0 | 38.0 | 866 |
| Tenth Street School | 2.9 | 13,092 | 0 | 3.0 | 68 |
| Tulalip Option School | ** | ** | ** | ** | ** |
| *TOTAL* | 66.1 | 321,002 | 0 | 109.0 | 2,484 |

*Table 3*
*High School Inventory*

| *High School* | *Site Size (Acres)* | *Building Area (Square Feet)* | *Other Stations* | *Teaching Stations** | *Permanent Capacity* |
|---|---|---|---|---|---|
| Marysville-Pilchuck | 83.0 | 261,976 | 0 | 79.0 | 2,176 |
| Marysville Alternative | 2.4 | 18,350 | 0 | 9.0 | 248 |
| Tulalip Learning Ctr. | ** | ** | ** | ** | ** |
| *TOTAL* | 85.4 | 280,326 | 0 | 88.0 | 2,424 |

* Teaching Station Definition: A space designated as a classroom.

** The Tulalip Option School and the Tulalip Learning Center are located in relocatable facilities that are owned by the District. *See* Table 4. They are located on sites that are not owned by the District.

## *Table 4*
## *Relocatable Classroom (Portable) Inventory*

| *Elementary School* | *Relocatables* | *Other Relocatables** | *Interim Capacity* |
|---|---|---|---|
| Allen Creek | 5 | 0 | 120 |
| Cascade | 5 | 0 | 120 |
| Kellogg Marsh | 5 | 0 | 120 |
| Liberty | 5 | 0 | 120 |
| Marshall | 3 | 2 | 120 |
| Pinewood | 5 | 0 | 120 |
| Quil Ceda | 5 | 0 | 120 |
| Shoultes | 5 | 1 | 144 |
| Sunnyside | 4 | 0 | 96 |
| Tulalip | 1 | 0 | 24 |
| *SUBTOTAL* | 43 | 3 | 1,104 |

| *Middle Level School* | *Relocatables* | *Other Relocatables* | *Interim Capacity* |
|---|---|---|---|
| Cedarcrest (6-9) | 13 | 0 | 296 |
| Marysville Jr Hi (8-9) | 0 | 0 | 0 |
| Marysville Mid (6-7) | 12 | 0 | 274 |
| Tenth Street School | 5 | 0 | 114 |
| Tulalip Option School** | 4 | 0 | 91 |
| *SUBTOTAL* | 34 | 0 | 775 |

| *High School* | *Relocatables* | *Other Relocatables* | *Interim Capacity* |
|---|---|---|---|
| Marysville-Pilchuck | 13 | 0 | 358 |
| Marysville Alt. | 0 | 0 | 0 |
| Tulalip Learning Ctr.** | 2 | 0 | 55 |
| *SUBTOTAL* | 15 | 0 | 413 |

| | | | |
|---|---|---|---|
| *TOTAL* | 92 | 3 | 2,292 |

* The relocatables referenced under "other relocatables" are used for special pull-out programs.

### *Support Facilities*

In addition to schools, the District owns and operates additional facilities which provide operational support functions to the schools. An inventory of these facilities is provided in Table 5.

*Table 5*
*Support Facility Inventory*

| *Facility* | *Building Area (Square Feet)* | *Site Size (Acres)* |
|---|---|---|
| Service Center | | 11.35 |
| Administration | 33,028 | |
| Grounds | 3,431 | |
| Maintenance | 12,361 | |
| Engineering | 7,783 | |
| Warehouse | 16,641 | |

### *Land Inventory*

The District owns a number of undeveloped sites. An inventory of these sites is provided in Table 6.

*Table 6*
*Undeveloped Site Inventory*

| *Site* | *Site Size (Acres)* |
|---|---|
| 132nd Street Site | 20.00 |
| 152nd Street Site | 35.02 |
| Old Getchell Site | 10.00 |
| New Getchell Site | 14.00 |
| West Marshall Site (School Farm) | 18.00 |
| Quil Ceda Road Site | 39.40 |
| Sunnyside Hills Site | 13.00 |

Development of these sites is restricted due to significant wetlands, limited site sizes, high utility costs, and/or inappropriate locations.

The District plans to acquire a site for the second high school. It also plans to acquire an additional elementary site in the Sunnyside area due to the sewer extension and the anticipated growth in this part of the District.

The District does not own any sites which are developed for uses other than schools.

## *STUDENT ENROLLMENT PROJECTIONS*

### *Projected Student Enrollment 1999-2005*

Enrollment projections are most accurate for the initial years of the forecast period. Moving further into the future, more assumptions about economic conditions and demographic trends in the area affect the projection. Monitoring birth rates in the County and population growth for the area are essential yearly activities in the ongoing management of the capital facilities plan. In the event that enrollment growth slows, plans for new facilities can be delayed. It is much more difficult, however, to initiate new projects or speed projects up in the event enrollment growth exceeds the projections.

The GMA requires that planning for public facilities be based on the 20-year population projections developed by OFM. This element of the GMA has been interpreted to mean the OFM population forecasts are minimums, which must be accommodated.

The District has developed its own methodology for forecasting future enrollments. The District forecasts future enrollments using the OSPI cohort survival projections. It projects a total enrollment of 13,224 students in 2005. In other words, the District expects the enrollment of 1,758 additional students between 1999 and 2005. *See* Appendix A.

OFM population-based enrollment projections were estimated for the District using OFM population forecasts for the County. Between 1990 and 1999, the District's enrollment constituted 20.13% of the District's population. Assuming that, between 2000 and 2005, the District's enrollment will constitute 20.13% of the District's population, using OFM/County data, the District projects a total enrollment of 11,997 students in 2005. *See* Appendix A.

A comparison of the projected total enrollments derived using the forecast methodologies described above is provided in Table 7.

*Table 7*
*Projected Student Enrollment (Headcount)*
*2000-2005*

| *Projection* | *1999** | *2000* | *2001* | *2002* | *2003* | *2004* | *2005* | *Actual Change* | *Percent Change* |
|---|---|---|---|---|---|---|---|---|---|
| OFM/County | 10,999 | 10,812 | 11,085 | 11,357 | 11,630 | 11,772 | 11,997 | 1,185 | 11% |
| District | 11,467 | 11,813 | 12,114 | 12,435 | 12,660 | 12,900 | 13,224 | 1,757 | 15.32% |

* Actual enrollment (October 1, 1999).

### *2012 Enrollment Projections*

Student enrollment projections beyond 2003 are highly speculative. The District projects a total enrollment of 16,263 students in 2012. This is based on the District's enrollment projections for 2005 and an estimated 3% annual increase in the student population. The total enrollment estimate was then broken down by grade span to evaluate long-term site acquisition needs for elementary, middle level, and high school facilities.

Projected enrollment by grade span for the year 2012 is provided in Table 8. Again, these estimates are highly speculative and are used only for general planning purposes.

*Table 8*
*Projected Student Enrollment*
*2012*

| *Grade Span* | *Projected Enrollment* |
|---|---|
| Elementary (K-5) | 7,639 |
| Middle Level School (6-8) | 3,839 |
| High School (9-12) | 4,785 |
| *TOTAL (K-12)* | 16,263 |

## *CAPITAL FACILITIES PROJECTIONS FOR FUTURE NEEDS*

Projected available student capacity was derived by subtracting projected student enrollment from existing school capacity (excluding relocatable classrooms) for each of the six years in the forecast period (2000-2005). Capacity needs are expressed in terms of "unhoused students." The method used to define future capacity needs assumes that:

- 400 students in grade 9 were shifted from the middle level schools (all of Cedarcrest 9th graders and approximately 15% of the Junior High School's 9th grade population) to the high school in 1999. All of the 9th grade students will be at the high schools when High School No. 2 is opened in 2004.
- High School No. 2 housing 1,600 students will start construction in 2001 and open in 2004.
- The reconstruction and classroom addition to Cascade and Liberty Elementary Schools. The projects will add an additional 14 teaching stations with the capacity to house 336 more students. The new school at Cascade will open in 2002 and Liberty will open in 2003.
- Two additional classrooms will be added to Quil Ceda Elementary. This will add capacity for 48 students. This addition is scheduled to open in the winter of 2002.
- A new elementary school housing 576 students will start construction in 2003 and open in 2004.
- A new middle level school housing 900 students will start construction in 2005 and open in 2006.

By the end of the six-year forecast period (2005), additional classroom capacity will be needed as follows:

***Table 9***
***Unhoused Students***
***2005***

| *Grade Span* | *Unhoused Students* |
|---|---|
| Elementary (K-5) | (125) |
| Middle School (6-8) | 0 |
| High School (9-12) | 0 |
| *TOTAL (K-12)* | (125) |

Projected future capacity needs are depicted on Table 10. They are derived by applying the projected number of students to the projected capacity. Grade reconfigurations and planned improvements by the District through 2005 are included in Table 10. It is not the District's policy to include relocatable classrooms when determining future capital facility needs; therefore interim capacity provided by relocatable classrooms is not included. (Information on relocatable classrooms and interim capacity can be found in Table 4. Information on planned construction projects can be found in the Financing Plan, Table 11.)

***Table 10***
***Projected Student Capacity***
***2000-2005***

***Elementary School Surplus/Deficiency***

| | *2000* | *2001* | *2002* | *2003* | *2004* | *2005* |
|---|---|---|---|---|---|---|
| Existing Capacity | 5,136 | 5,136 | 5,136 | 5,352 | 5,520 | 6,087 |
| Added Capacity | 0 | 0 | 216 | 168 | 576 | 0 |
| Total Capacity | 5,136 | 5,136 | 5,352 | 5,520 | 6,087 | 6,087 |
| Enrollment | 5,594 | 5,738 | 5,842 | 5,928 | 6,053 | 6,212 |
| Surplus (Deficiency) | (458) | (602) | (490) | (408) | 34 | (125) |

***Middle Level School Surplus/Deficiency***[1]

| | *2000* | *2001* | *2002* | *2003* | *2004* | *2005* |
|---|---|---|---|---|---|---|
| Existing Capacity | 2,484 | 2,484 | 2,484 | 2,484 | 2,484 | 2,484 |
| Added Capacity | 0 | 0 | 0 | 0 | 0 | 900 |
| Total Capacity | 2,484 | 2,484 | 2,484 | 2,484 | 2,484 | 3,384 |
| Enrollment | 3,693 | 3,709 | 3,857 | 4,037 | 3,110 | 3,121 |
| Surplus (Deficiency) | (1,209) | (1,225) | (1,373) | (1,553) | (626) | 263 |

***High School Surplus/Deficiency***

| | *2000* | *2001* | *2002* | *2003* | *2004* | *2005* |
|---|---|---|---|---|---|---|
| Existing Capacity | 2,424 | 2,424 | 2,424 | 2,424 | 2,424 | 4,024 |
| Added Capacity | 0 | 0 | 0 | | 1,600 | 0 |
| Total Capacity | 2,424 | 2,424 | 2,424 | 2,424 | 4,024 | 4,024 |
| Enrollment | 2,526 | 2,667 | 2,735 | 2,695 | 3,737 | 3,891 |
| Surplus (Deficiency) | (102) | (243) | (311) | (271) | 287 | 420 |

[1] Includes shifting of grade 9 students from middle schools to high school in 2004.

***Portable Additions***

| | *2000* | *2001* | *2002* | *2003* | *2004* | *2005* |
|---|---|---|---|---|---|---|
| Elementary | 1 | 26 | 0 | 0 | 0 | 0 |
| Middle | 0 | 2 | 2 | 4 | 0 | 0 |
| High School | 5 | 5 | 5 | 0 | 0 | 0 |

The addition of 26 portables at the elementary level in 2001 results from moving the Co-op School into its own facility.

## *FINANCING PLAN*

***Planned Improvements***

Subject to the availability of funding, the District also plans to address projected enrollment increases by constructing a 576 student elementary school (opening in the fall of 2004), the reconstruction in 2002 of Cascade Elementary which will add seven additional classrooms, a two classroom addition in 2002 at Quil Ceda Elementary School, the 2003 reconstruction of Liberty Elementary School which will add seven additional classrooms. A 1,600 student high school will open in the fall of 2004 and a 900 student middle school will open in the winter of 2006.

Funding for planned improvements is typically secured from a number of sources including voter-approved bonds, State match funds and impact fees. Each of these funding sources is discussed in greater detail below.

***Financing for Planned Improvements***

***General Obligation Bonds:*** Bonds are typically used to fund construction of new schools and other capital improvement projects, and require a 60% voter approval. The District has not finalized its plan on the scope and timing of a future bond issue, and has not secured funding at this time. A fully articulated plan will require input from community and staff, substantial exploration of facility options, and critical decisions by the Board of Directors. From this kind of process, the District can develop a bond issue package for submittal to District voters. The bond would be the major source of funding for future capital improvement projects.

***State Match Funds:*** State Match Funds come from the Common School Construction Fund, which is composed of revenues accruing predominantly from the sale of renewable resources (i.e., timber) from State school lands set aside by the Enabling Act of 1889. If these sources are insufficient to meet needs, the Legislature can appropriate funds or the State Board of Education can establish a moratorium on certain projects. School districts may qualify for State match funds for specific capital projects based on a prioritization system. The District currently qualifies for State match funds.

***Impact Fees:*** Impact fees are a means of supplementing traditional funding sources for construction of public facilities needed to accommodate new development. School impact fees are generally collected by the permitting agency at the time plats are approved or building permits are issued. *See* School Impact Fees.

The Six-Year Financing Plan shown on Table 11 demonstrates how the District intends to fund new construction and improvements to school facilities for the years 2000-2005. The financing components include bonds, State match funds, and impact fees.

The Financing Plan separates projects and portions of projects which add capacity from those which do not, since the latter are generally not appropriate for impact fee funding.

## *Table 11*
## *Capital Facilities Financing Plan*

**Improvements Adding Permanent Capacity (Costs in Millions[1])**

| Project | 2000 | 2001 | 2002 | 2003 | 2004 | 2005 | Total Cost | Bonds | State Match | Impact Fees[1] | Future Bond |
|---|---|---|---|---|---|---|---|---|---|---|---|
| **Elementary** | | | | | | | | | | | |
| Elementary No. 11[2] (Construction) | | | | X | X | | 9.86 | | X | X | X |
| Elementary Site Acquisition | | X | | | | | .89 | | | X | X |
| Cascade (Reconstruction and 7 Classroom Addition) | | X | X | | | | 2.71 | | X | X | X |
| Quil Ceda (2 Classroom Addition) | | X | | | | | .25 | | X | X | X |
| Liberty (Reconstruction and 7 Classroom Addition) | | | X | X | | | 2.79 | | X | X | X |
| **Middle Level** | | | | | | | | | | | |
| Middle School No. 4[2] (Site Acquisition) | | | | | | | 0 | | | | |
| Middle School No. 4[2] (Construction) | | | | | | X | 24.8 | | X | X | X |
| **High School** | | | | | | | | | | | |
| High School No. 2[2] (Site Acquisition) | | X | | | | | 3.3 | | | X | X |
| High School No. 2[2] (Construction) | | X | X | X | X | | 53.79 | | X | X | X |

**Improvements Adding Temporary Capacity (Costs in Millions)**

| Project | 2000 | 2001 | 2002 | 2003 | 2004 | 2005 | Total Cost | Bonds | State Match | Impact Fees | Future Bond |
|---|---|---|---|---|---|---|---|---|---|---|---|
| **Elementary** | | | | | | | | | | | |
| Portables | .07 | 1.82 | | | | | 1.89 | | | X | X |
| **Middle Level** | | | | | | | | | | | |
| Portables | | .14 | .16 | .32 | | | .62 | | | X | X |
| **High School** | | | | | | | | | | | |
| Portables | .35 | .35 | .40 | | | | 1.10 | | | X | X |

**Total Improvements – (Costs in Millions)**

| | Total Cost | Bonds | State Match | Impact Fees | Future Bond |
|---|---|---|---|---|---|
| **Elementary** | 18.39 | | X | X | X |
| **Middle Level** | 25.42 | | X | X | X |
| **High School** | 58.19 | | X | X | X |
| **TOTALS** | 102.00 | | | | |

[1] Where specific amounts are shown, the District has already collected and intends to allocate such amounts to such projects. Where no specific amount is shown, the District anticipates collecting and allocating such amounts to such projects. When more data is available, the District will allocate specific amount to such projects.

[2] The cost estimates for Elementary No. 11, Middle Level School No. 4, and High School No. 2 are preliminary and subject to change.

## *SCHOOL IMPACT FEES*

The GMA authorizes jurisdictions to collect impact fees to supplement funding of additional public facilities needed to accommodate new development. Impact fees cannot be used for the operation, maintenance, repair, alteration, or replacement of existing capital facilities used to meet existing service demands.

***School Impact Fees in Snohomish County, the City of Marysville, and the City of Everett***

The Snohomish County General Policy Plan ("GPP") which implements the GMA sets certain conditions for school districts wishing to assess impact fees:

- The District must provide support data including: an explanation of the calculation methodology, description of key variables and their computation, and definitions and sources of data for all inputs into the fee calculation.
- Data must be accurate, reliable, and statistically valid.
- Data must accurately reflect projected costs in the Six-Year Financing Plan.
- Data in the proposed impact fee schedule must reflect expected student generation rates from the following residential unit types: single family; multi-family/studio or one-bedroom; and multi-family/two or more-bedroom.

Snohomish County established a school impact fee program in November 1997, and amended the program in December 1999. This program requires school districts to prepare and adopt Capital Facilities Plans meeting the specifications of the GMA. Impact fees calculated in accordance with the formula, which are based on projected school facility costs necessitated by new growth and are contained in the District's CFP, become effective following County Council adoption of the District's CFP.

The City of Marysville also adopted a school impact fee program consistent with the Growth Management Act in November 1998 and amended the program in December 1999.

***Methodology Used to Calculate School Impact Fees***

Impact fees in Appendix B have been calculated utilizing the formula in the Snohomish County Code and the Marysville Municipal Code. The same formula is used for calculating impact fees for the City of Everett. The resulting figures are based on the District's cost per

dwelling unit to purchase land for school sites, make site improvements, construct schools, and purchase/install relocatable facilities (portables). As required under the GMA, credits have also been applied in the formula to account for State Match Funds to be reimbursed to the District and projected future property taxes to be paid by the dwelling unit.

The District's cost per dwelling unit is derived by multiplying the cost per student by the applicable student generation rate per dwelling unit. The student generation rate is the average number of students generated by each housing type -- in this case, single family dwellings and multi-family dwellings. Multi-family dwellings were broken out into one-bedroom and two-plus bedroom units. Pursuant to the Snohomish County and the City of Marysville School Impact Fee Ordinances, the District conducted student generation studies within the District. This was done to "localize" generation rates for purposes of calculating impact fees. Student generation rates for the District are shown on Table 12. *See also* Appendix C.

***Table 12***
***Student Generation Rates***

| | *Elementary* | *Middle Level* | *High School* | *TOTAL* |
|---|---|---|---|---|
| Single Family | .316 | .191 | .102 | .609 |
| Multi-Family (1 Bedroom) | .000 | .000 | .000 | .000 |
| Multi-Family (2+ Bedrooms) | .260 | .120 | .070 | .450 |

***Proposed Marysville School District Impact Fee Schedule***

Using the variables and formula described, impact fees proposed for the District in Snohomish County, City of Marysville, and City of Everett, using the County's discount rate, are summarized in Table 13. *See also* Appendix B.

***Table 13***
***School Impact Fees***
***2000***

| *Housing Type* | *Impact Fee Per Dwelling Unit* |
|---|---|
| Single Family | $3,847 |
| Multi-Family (1 Bedroom) | 0 |
| Multi-Family (2+ Bedroom) | $3,030 |

***APPENDIX A***

***POPULATION AND ENROLLMENT DATA***

*APPENDIX A*
*PROJECTED STUDENT ENROLLMENT 2000-2005*
*(District Estimate)*

| School Type | Grade Level | 1999 * | 2000 | 2001 | 2002 | 2003 | 2004 | 2005 |
|---|---|---|---|---|---|---|---|---|
| **Elementary** | K | 830 | 878 | 896 | 915 | 933 | 951 | 969 |
| | 1 | 909 | 899 | 951 | 970 | 991 | 1,010 | 1,030 |
| | 2 | 951 | 936 | 926 | 979 | 999 | 1,020 | 1,041 |
| | 3 | 942 | 979 | 964 | 952 | 1,008 | 1,028 | 1,050 |
| | 4 | 910 | 971 | 1,008 | 993 | 981 | 1,038 | 1,059 |
| | 5 | 916 | 932 | 994 | 1,033 | 1,017 | 1,005 | 1,063 |
| **Subtotal** | | **5,458** | **5,594** | **5,738** | **5,842** | **5,928** | **6,053** | **6,212** |
| **Middle Level** | 6 | 872 | 927 | 943 | 1,006 | 1,045 | 1,029 | 1,017 |
| | 7 | 878 | 891 | 947 | 963 | 1,027 | 1,067 | 1,051 |
| | 8 | 930 | 867 | 880 | 935 | 951 | 1,014 | 1,054 |
| | 9 | 997 | 1,009 | 940 | 954 | 1,014 | | |
| **Subtotal** | | **3,677** | **3,693** | **3,709** | **3,857** | **4,037** | **3,110** | **3,121** |
| **High School** | 9 | | | | | | 1,031 | 1,100 |
| | 10 | 835 | 972 | 984 | 917 | 930 | 989 | 1,006 |
| | 11 | 799 | 798 | 929 | 939 | 876 | 888 | 944 |
| | 12 | 698 | 756 | 755 | 879 | 889 | 829 | 841 |
| **Subtotal** | | **2,332** | **2,526** | **2,667** | **2,735** | **2,695** | **3,737** | **3,891** |
| **District Total** | | **11,467** | **11,813** | **12,114** | **12,435** | **12,660** | **12,900** | **13,224** |

* October 1, 1999 Headcount

## *APPENDIX A*
## *PERCENTAGE PROJECTED ENROLLMENT BY GRADE SPAN*

| **Enrollment by Grade Span** | **1999 *** | **2000** | **2001** | **2002** | **2003** | **2004** | **2005** |
|---|---|---|---|---|---|---|---|
| Elementary | 5,458 | 5,594 | 5,738 | 5,842 | 5,928 | 6,053 | 6,212 |
| Middle Level | 3,677 | 3,693 | 3,709 | 3,857 | 4,037 | 3,110 | 3,121 |
| High School | 2,332 | 2,526 | 2,667 | 2,735 | 2,695 | 3,737 | 3,891 |
| **Total** | 11,467 | 11,813 | 12,114 | 12,435 | 12,660 | 12,900 | 13,224 |

| **Percentage by Grade Span** | **1999** | **2000** | **2001** | **2002** | **2003** | **2004** | **2005** |
|---|---|---|---|---|---|---|---|
| Elementary | 47.60% | 47.35% | 47.37% | 46.98% | 46.82% | 46.92% | 46.98% |
| Middle Level | 32.07% | 31.26% | 30.62% | 31.02% | 31.89% | 24.11% | 23.60% |
| High School | 20.34% | 21.38% | 22.02% | 22.00% | 21.29% | 28.97% | 29.42% |
| **Total** | 100.00% | 100.00% | 100.00% | 100.00% | 100.00% | 100.00% | 100.00% |

* October 1, 1999 Headcount

***APPENDIX B***

***SCHOOL IMPACT FEE CALCULATIONS***

**SCHOOL IMPACT FEE CALCULATIONS**

DISTRICT: Marysville School District
YEAR: 2000

**School Site Acquisition Cost:**

((AcresxCost per Acre)/Facility Capacity)xStudent Generation Factor

| | Facility Acreage | Cost/ Acre | Facility Capacity | Student Factor SFR | Student Factor MFR (1) | Student Factor MFR (2+) | Cost/ SFR | Cost/ MFR (1) | Cost/ MFR (2+) |
|---|---|---|---|---|---|---|---|---|---|
| Elementary | 10.00 | $ 89,000.00 | 576 | 0.316 | 0.000 | 0.260 | $488 | $0 | $402 |
| Middle | 20.00 | $ - | 900 | 0.191 | 0.000 | 0.120 | $0 | $0 | $0 |
| High | 40.00 | $ 82,500.00 | 1,600 | 0.102 | 0.000 | 0.070 | $210 | $0 | $144 |
| | | | | | | TOTAL | $699 | $0 | $546 |

**School Construction Cost:**

((Facility Cost/Facility Capacity)xStudent Generation Factor)x(permanent/Total Sq Ft)

| | %Perm/ Total Sq.Ft. | Facility Cost | Facility Capacity | Student Factor SFR | Student Factor MFR (1) | Student Factor MFR (2+) | Cost/ SFR | Cost/ MFR (1) | Cost/ MFR (2+) |
|---|---|---|---|---|---|---|---|---|---|
| Elementary | 92.60% | $ 9,855,761 | 576 | 0.316 | 0.000 | 0.260 | $5,007 | $0 | $4,120 |
| Middle | 92.60% | $ 24,749,870 | 900 | 0.191 | 0.000 | 0.120 | $4,864 | $0 | $3,056 |
| High | 92.60% | $ 53,783,950 | 1,600 | 0.102 | 0.000 | 0.070 | $3,175 | $0 | $2,179 |
| | | | | | | TOTAL | $13,046 | $0 | $9,354 |

**Temporary Facility Cost:**

((Facility Cost/Facility Capacity)xStudent Generation Factor)x(Temporary/Total Square Feet)

| | %Temp/ Total Sq.Ft. | Facility Cost | Facility Size | Student Factor SFR | Student Factor MFR (1) | Student Factor MFR (2+) | Cost/ SFR | Cost/ MFR (1) | Cost/ MFR (2+) |
|---|---|---|---|---|---|---|---|---|---|
| Elementary | 7.40% | $ 70,000.00 | 24 | 0.316 | 0.000 | 0.260 | $68 | $0 | $56 |
| Middle | 7.40% | $ 70,000.00 | 24 | 0.191 | 0.000 | 0.120 | $41 | $0 | $26 |
| High | 7.40% | $ 70,000.00 | 29 | 0.102 | 0.000 | 0.070 | $18 | $0 | $13 |
| | | | | | TOTAL | | $128 | $0 | $95 |

**State Matching Credit:**

Boeckh Index X SPI Square Footage X District Match % X Student Factor

| | Boeckh Index | SPI Footage | District Match % | Student Factor SFR | Student Factor MFR (1) | Student Factor MFR (2+) | Cost/ SFR | Cost/ MFR (1) | Cost/ MFR (2+) |
|---|---|---|---|---|---|---|---|---|---|
| Elementary | $ 101.15 | 80 | 69.02% | 0.316 | 0.000 | 0.260 | $1,765 | $0 | $1,452 |
| Junior | $ 101.15 | 105 | 69.02% | 0.191 | 0.000 | 0.120 | $1,400 | $0 | $880 |
| Sr. High | $ 101.15 | 120 | 69.02% | 0.102 | 0.000 | 0.070 | $855 | $0 | $586 |
| | | | | | TOTAL | | $4,020 | $0 | $2,918 |

**Tax Payment Credit:**

| | SFR | MFR (1) | MFR (2+) |
|---|---|---|---|
| Average Assessed Value | $132,941 | $43,653 | $62,622 |
| Capital Bond Interest Rate | 5.94% | 5.94% | 5.94% |
| Net Present Value of Average Dwelling | $981,245 | $322,205 | $462,213 |
| Years Amortized | 10 | 10 | 10 |
| Property Tax Levy Rate | $2.20 | $2.20 | $2.20 |
| Present Value of Revenue Stream | $2,159 | $709 | $1,017 |

**Fee Summary:**

| | Single Family | Multi-Family (1) | Multi-Family (2+) |
|---|---|---|---|
| Site Acquisition Costs | $699 | $0 | $546 |
| Permanent Facility Cost | $13,046 | $0 | $9,354 |
| Temporary Facility Cost | $128 | $0 | $95 |
| State Match Credit | ($4,020) | $0 | ($2,918) |
| Tax Payment Credit | ($2,159) | ($709) | ($1,017) |
| FEE (AS CALCULATED) | $7,694 | $0 | $6,060 |
| FEE (AS DISCOUNTED) | $3,847 | $0 | $3,030 |

K:\33985\00001\2000FINAL.XLS

***APPENDIX C***

***STUDENT GENERATION RATES (SGR)***

## APPENDIX C

## STUDENT GENERATION RATES (SGR)

The 1999-2000 Marysville School District Student Generation Rates (SGR) for both single family and multiple family, as specified by Snohomish County ordinance, have been determined as outlined below. The rates have been calculated for three types of residential development: single family, multi-family units with one bedroom, and multi-family units with two or more bedrooms. A survey was done that included all of the territory within the boundaries of the Marysville School District. The analysis was based on projects permitted from 1992 to 1999. The primary sources of information were Snohomish County and the Marysville School District.

The process of analysis involved gathering the residential development data from 1992 to June of 1999 from the County. This County data included all new development for unincorporated Snohomish County and the City of Marysville that is within the Marysville School District boundary lines. The County data used is from the Metroscan data base (Transamerica Intellitech). Metroscan is a commercial database product derived from the Snohomish County Assessor's files. The District supplemented these data by collecting additional information. Specific information required was the discrete apartment address and the number of bedrooms in each multi-family unit. A comparison of the street addresses of the new developments with the addresses of each of the District's students from the 1999-2000 school year produced a record of each unit occupied by a student. This information was aggregated into the three grade groupings, and produced the student generation rates for each type of residential development specified above.

District/Browning Consulting

Exhibit C

# MONROE SCHOOL DISTRICT NO. 103

## CAPITAL FACILITIES PLAN
## 2000 - 2005

*prepared for:*

Snohomish County
Planning Department

March 2000
*Revised April, 2000*
*Revised May, 2000*

# CAPITAL FACILITIES PLAN
## MONROE SCHOOL DISTRICT NO. 103

### BOARD OF DIRECTORS

W. Dean Adams
Greg Baker
Tom MacIntyre
Sue Magruder
Marykaye Sieverson

### SUPERINTENDENT

Dr. William Prenevost

**Plan reviewed by the Board of Directors on March 27, 2000**
**Adopted by the Board of Directors on May 22, 2000**

This plan is not a static document. It will change as demographics, information and District plans change. It is a "snapshot" of one moment in time.

For information on the Monroe School District Capital Facilities plan contact the District at (360) 794-3000.

# MONROE SCHOOL DISTRICT
# CAPITAL FACILITIES PLAN
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# CHAPTER 1 – INTRODUCTION

Monroe School District's Capital Facilities Plan (CFP) is intended to provide the District, Snohomish County and other jurisdictions with a description of facilities needed to accommodate projected student enrollment at acceptable levels of service over the next twelve years, and a more detailed schedule and financing program for capital improvement over the next six years (2000 - 2005). In accordance with the Growth Management Act this CFP contains the following required elements:

- An inventory of existing capital facilities owned by the school District, showing the locations and capacities of the facilities.
- A forecast of the future needs for capital facilities owned and operated by the District.
- The proposed locations and capacities of expanded or new capital facilities.
- A six year plan for financing capital facilities within projected funding capacities, which clearly identifies sources of public money for such purposes.

The Growth Management Act also requires reassessment of the land use element if probable funding falls short of meeting existing needs and to ensure that the land use element, capital facilities plan element, and financing plan within the capital facilities plan element are coordinated and consistent. The Capital Facilities Plan is intended to provide local jurisdictions with information on the school District's ability to accommodate projected population and enrollment demands anticipated through implementation of various comprehensive plan land use alternatives.

In addition to the CFP elements required by the Growth Management Act, this CFP provides supporting documentation for the variables used to calculate development impact fees.

**Overview of the Monroe School District**

The Monroe School District is located in the southeastern portion of Snohomish County. The District covers approximately 140 square miles. The Skykomish and Snoqualmie Rivers join to form the Snohomish River in the central portion of the District. The topography includes flood plains to rolling hills. The major east-west road is U.S. Highway 2, leading from Everett to Stevens Pass and Eastern Washington. The major link to Bothell, Seattle, and the east side of King County is SR-522, leading from Monroe to Woodinville. SR-203 is becoming a major traffic link between Monroe, Carnation, Duvall and Fall City.

The District currently serves a student population of 5,408 (October 1, 1999) with four elementary schools, three middle schools, one junior high school and one high school. Leaders in Learning, an individualized secondary program, is also offered in a facility owned by the District but not located in an existing school. Sky Valley Education Center, an individualized program for grades K-12 for students who otherwise would be home schooled, is housed in leased facilities. Sky Valley Education Center and Leaders in Learning student enrollment figures are included in both the District and OSPI figures. Elementary schools provide educational programs for students in kindergarten through grade four. Middle schools serve

grades five through seven. The junior high serves grades eight and nine, and the high school grades ten through twelve. Leaders in Learning serves grades eight through twelve.

**Significant Issues Related To Facility Planning In The Monroe School District**

The most significant issues facing the Monroe School District in terms of providing classroom capacity to accommodate projected demands are the rate of student growth, willingness or unwillingness of voters to approve a capital construction bond issue and the availability and affordability of suitable school sites, including perkable soil for septic systems. These issues are addressed in greater detail in the Capital Facilities Plan.

## CHAPTER 2 – DEFINITIONS

Throughout the Capital Facilities Plan a number of terms are used which are found in RCW 82.02.090 and Snohomish County Code Title 26C. To establish consistency between local, county and state agencies, the terms are defined as follows:

**Appendix F** - means Appendix F of the Snohomish County Growth management Act (GMA) Comprehensive Plan, also referred to as the General Policy Plan.

**Average Assessed Value** – Average assessed value by dwelling unit type by all residential development units constructed within district.

**Boeckh Index** - means the current construction trade index of construction costs for each school type.

**Capital Facilities** - means school facilities identified in a school District's capital facilities plan and are "system improvements" as defined by the GMA as opposed to localized "project improvements."

**Capital Facilities Plan** - means a District's facilities plan adopted by its school board consisting of those elements required by Chapter 26C.24.SCC and meeting the requirements of the GMA.

**Council** - Means the Snohomish County Council

**County** - means Snohomish County.

**Developer** - means the proponent of a development activity, such as any person or entity who owns or holds purchase options or other development control over property for which development activity is proposed.

**Development** - means all subdivisions, short subdivisions, conditional or special use permits, binding site plan approvals, rezones accompanied by an official site plan, or building permits (including building permits for multi-family and duplex residential structures, and all similar uses) and other applications requiring land use permits or approval by Snohomish County.

**Development Activity** - means any residential construction or expansion of a building, structure or use of land, or any other change in use of a building, structure, or land that creates additional demand and need for school facilities, but excluding building permits for attached or detached accessory apartments, and remodeling or renovation permits which do not result in additional dwelling units. Also excluded from this definition is "Housing for Older Persons" as defined by 46 U.S.C.§3607, when guaranteed by a restrictive covenant, and new single-family detached units constructed on legal lots created prior to May 1, 1991.

**Development Approval** - means any written authorization from the County which authorizes the commencement of a development activity.

**Development Approval** – means any written authorization from the County which authorizes the commencement of a development activity.

**Director** - means the Director of the Snohomish County Department of Planning and Development Services, or the director's designee.

**District** - means a school District whose geographic boundaries include areas within Snohomish County.

**District Property Tax Levy Rate** - means the District's current capital property tax rate per thousand dollars of assessed value.

**Dwelling Unit Type** - means (1) single-family residences, (2) multi-family one-bedroom apartment or condominium units and (3) multi-family multiple-bedroom apartment or condominium units.

**Encumbered** - means school impact fees identified by the District to be committed as part of the funding for capital facilities for which the publicly funded share has been assured, development approvals have been sought or construction contracts have been let.

**Estimated Facility Construction Cost** - means the planned costs of new schools or the actual construction costs of schools of the same grade span recently constructed by the District, including on-site and off-site improvement costs. If the District does not have this cost information available construction costs of school facilities of the same or similar grade span within another District are acceptable.

**Facility Design Capacity** - means the number of students each school type is designed to accommodate, based on the standard of service as determined by the District.

**FTE (Full Time Equivalent)** - This is a means of measuring student enrollment based on the number of hours per day in attendance in District schools. For purposes of this Plan, kindergarten students attend half day programs and are counted as .5 FTE. All other students are counted as full FTE. (This is in line with OSPI's, Capital Facilities Section, FTE measurements and projections.)

**Grade Span** - means a category into which a District groups its grades of students (e.g., elementary, intermediate, middle or junior high, and high school).

**Growth Management Act / GMA** - means the Growth Management Act, Chapter 17, Laws of the State of Washington of 1990, 1st Ex.Sess. as now in existence or as hereafter amended.

**Interest Rate** - means the current interest rate as stated in the Bond Buyer Twenty Bond General Obligation Bond Index.

**Land Cost Per Acre** - means the estimated average land acquisition cost per acre (in current dollars) based on recent site acquisition costs, comparisons of comparable site acquisition costs

in other Districts, or the average assessed value per acre of properties comparable to school sites located within the District.

**Multi-Family Unit** - means any residential dwelling unit that is not a single-family unit as defined by this ordinance.

**OFM** - Washington State Office of Financial Management

**OSPI** - Washington State Office of the Superintendent of Public Instruction

**Permanent Facilities** - means school facilities of the District with a fixed foundation.

**RCW** - Revised Code of Washington (a state law)

**Relocatable Facilities** - means factory-built structures, transportable in one or more sections, that are designed to be used as education spaces and are needed to prevent the overbuilding of school facilities, to meet the needs of service areas within a District, or to cover the gap between the time that families move into new residential developments and the date that construction is completed on permanent school facilities.

**Relocatable Facilities Cost** - means the total cost, based on actual costs incurred by the District, for purchasing and installing portable classrooms.

**Relocatable Facilities Student Capacity** - means the rated capacity for a typical portable classroom used for a specified grade span.

**School Impact Fee** - means a payment of money imposed upon development as a condition of development approval to pay for school facilities needed to serve new growth and development. The school impact fee does not include a reasonable permit fee, an application fee, the administrative fee for collecting and handling impact fees, or the cost of reviewing independent fee calculations.

**SEPA** - Washington State Environmental Policy Act.

**Single Family Unit** - means any detached residential dwelling unit designed for occupancy by a single family or household.

**Standard of Service** - means the standard adopted by each District which identifies the program year, the class size by grade span and taking into account the requirements of students with special needs, the number of classrooms, the types of facilities the District believes will best serve its student population, and other factors as identified in the District's capital facilities plan. The District's standard of service shall not be adjusted for any portion of the classrooms housed in relocatable facilities which are used as transitional facilities or from any specialized facilities housed in relocatable facilities.

**State Match Percentage** - means the proportion of funds that are provided to the District for specific capital projects from the state's Common School Construction Fund. These funds are disbursed based on a formula which calculates District assessed valuation per pupil relative to the whole state assessed valuation per pupil to establish the maximum percentage of the total project eligible to be paid by the state.

**Student Factor (Student Generation Rate)** - means the number of students of each grade span (elementary, intermediate, middle/junior high, high school) that a District determines are typically generated by different dwelling unit types within the District. Each school District will use a survey or statistically valid methodology to derive the specific student generation rate, provided that the survey or methodology is approved by the Snohomish County Council as part of the adopted capital facilities plan for each school District.

**Unhoused Students** - District enrolled students who are housed in portable or temporary classroom space, or in permanent classrooms in which the maximum class size is exceeded.

**WAC** - Washington Administrative Code.

## CHAPTER 3 – STUDENT ENROLLMENT TRENDS AND PROJECTIONS

### Historical Trends

Student enrollment records dating back to 1973 were available from Snohomish County. Student enrollment in the Monroe School District remained relatively constant between 1973 and the mid-1980's. Enrollment within the District has increased dramatically since 1985, with current enrollment (October 1, 1999) at 5,408 students. Actual enrollment by year is shown in Figure 1. Figure 2 provides a comparison of student enrollment trends over the past 26 years within the Monroe School District and Snohomish County. Since 1986 enrollment growth within the District has exceeded the County's enrollment growth rate. Historical student enrollment data is provided in Appendix A.

**Figure 1**
**Historical Enrollment**
**Monroe School District**

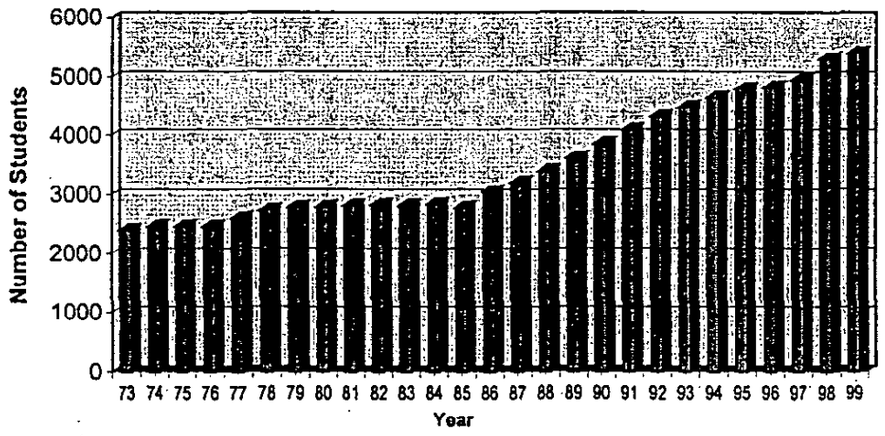
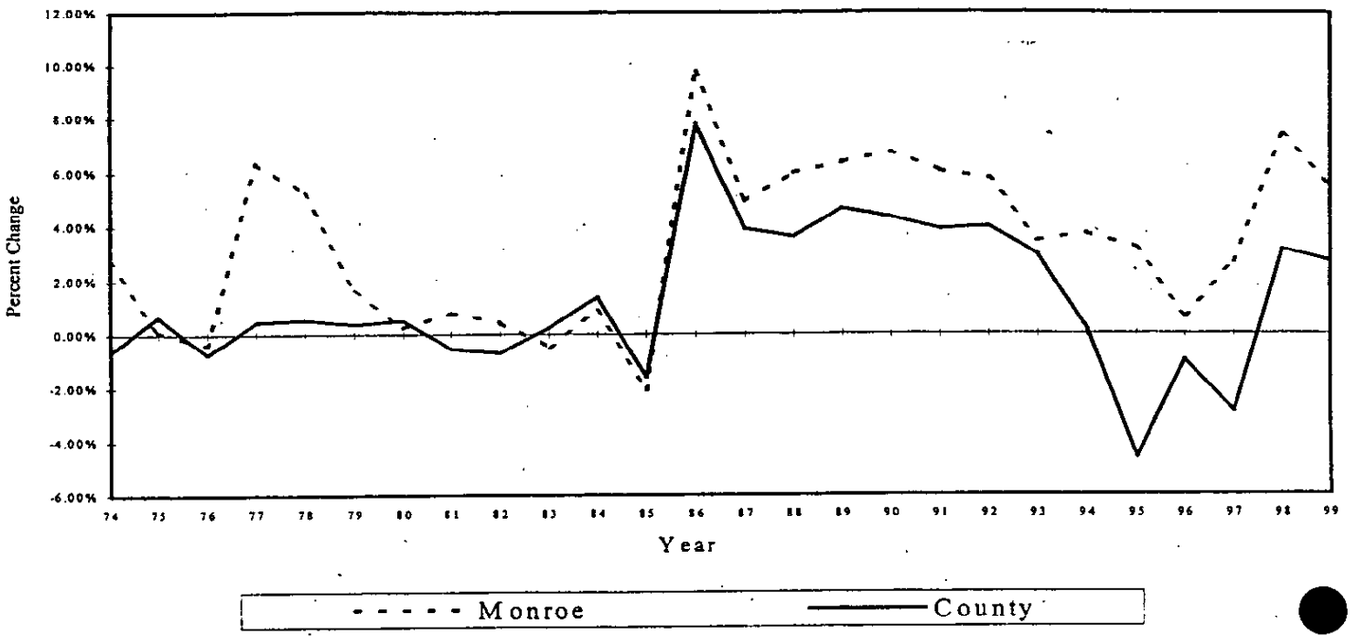


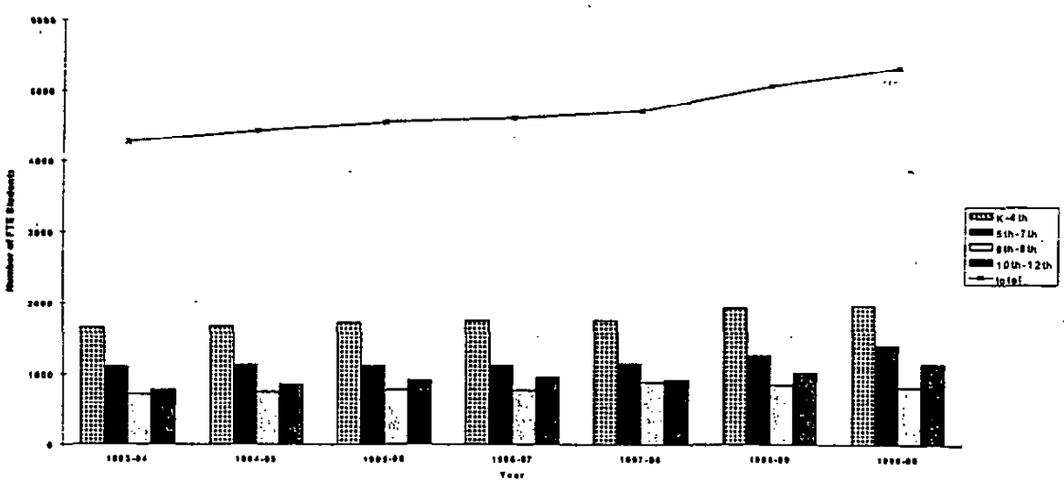
**Figure 2**
**Annual Change in Enrollment**
**Monroe School District vs. Snohomish County**




**Recent Trends - FTE Student Enrollment**

Facility needs are determined in part by evaluating recent trends in Full Time Equivalent (FTE) student enrollment. FTE enrollment in elementary grades K-4 increased by 314 students between 1993 and 1999, an increase of 19%. At the middle school level (grades 5-7), enrollment grew by a total of 292 students, an increase of 29%. Enrollment at the junior high school level (grades 8-9) grew by 98 students, an increase of 13.6% over the 7-year period and enrollment at the high school level (grades 10-12 by 377 students, an increase of 48%. Between 1993 and 2000, total District enrollment increased by 25% or 1081 FTE students. Recent enrollment trends at the elementary, middle and high school grade spans are shown in Figure 3.

**Figure 3**
**Monroe School District**
**Actual Change in Average Annual FTE Student Enrollment Growth 1993-1999**




Source: Monroe School District

**Projected Student Enrollment 2000-2005**

Enrollment projections are most accurate for the initial years of a given forecast period. As the forecast period extends beyond the current period there are many variables which interact to make accurate forecasting an inexact science at best.

The District continues to maintain birth rate data, records of annexations, housing starts and the myriad of other factors that impact student enrollment projections.

In preparing this report, the District looked primarily at two major enrollment projection models. These projections were developed by the Office of Superintendent of Public Instruction (OSPI) and Shockey/Brent in 1993 as part of the joint school facilities planning project; it uses the state OFM population forecast, as disaggregated through the PSRC and county sub-allocation models. Each forecast shows a continued growth of student population in the Monroe School District.

For purposes of this Plan, the District has chosen to use the OSPI student population forecast model because it more closely relates to the District's projections and appears more accurate in the short term. Annual monitoring of the actual student enrollment will allow the District to make necessary modifications to its current CFP as may be needed.

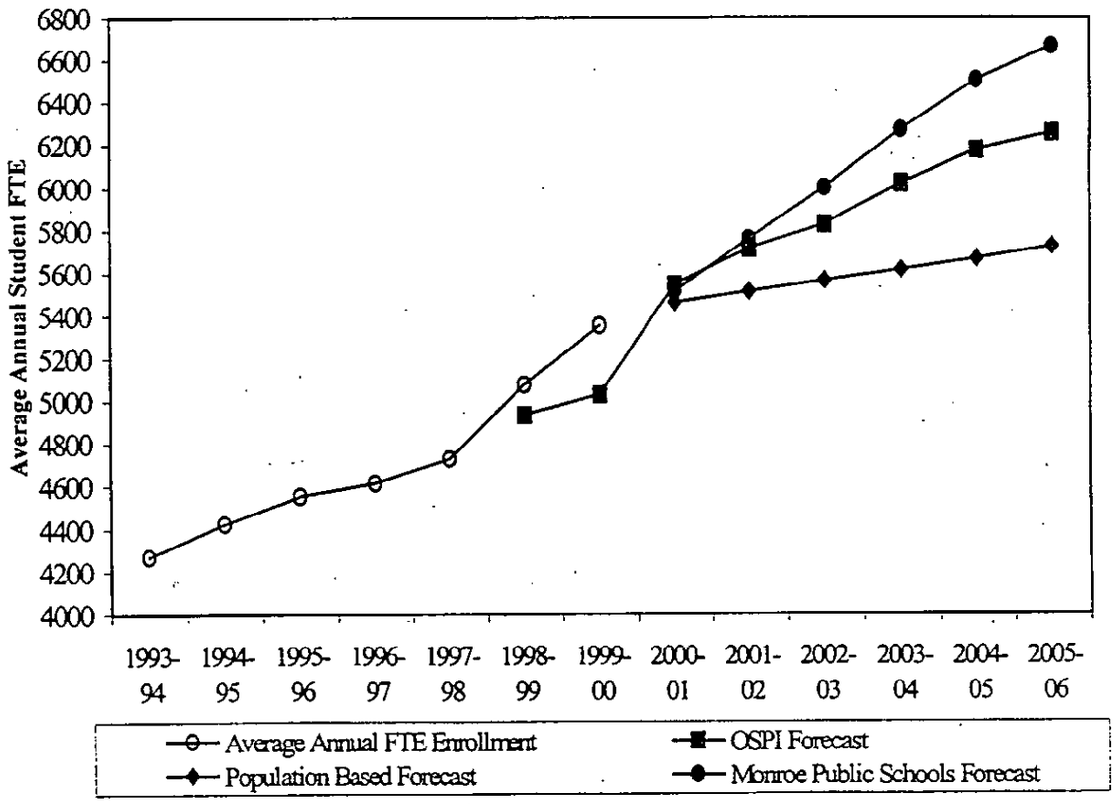
A comparison of the total FTE student enrollment projections using the OSPI and the population-based forecast is shown in Table 1. Figure 4 provides a comparison of the two enrollment projections relative to the FTE student enrollment trend over the prior six years.

**Table 1**
**Comparison of FTE Student Enrollment Projections**
**Monroe School District 2000-2005**

| Projection | 1999 | 2000 | 2001 | 2002 | 2003 | 2004 | 2005 | Projected change 99-05 | Projected change 99-05 |
|---|---|---|---|---|---|---|---|---|---|
| Actual (10/1/99) | 5408 | | | | | | | | |
| OSPI Forecast | | 5543 | 5713 | 5828 | 6018 | 6173 | 6256 | 850 | 15.7% |
| Population based forecast | | 5459 | 5510 | 5561 | 5613 | 5664 | 5722 | 316 | 5.8% |

Source: OSPI, Monroe School District

**Figure 4**
**Comparison of FTE Student Enrollment Projections**
**Monroe School District 2000-2005**



Based on OSPI's model, FTE student enrollment is projected to increase 7% or 137 students at the elementary school level, 6% or 92 students at the middle school level, 17% or 159 students at the junior high school level and 28% or 325 students at the high school level by 2005.

The District opened two new schools in the fall of 1999 and reconfigured its schools. Currently the District's grade level configuration is K-4, 5-7, 8-9 and 10-12. The District will place on the ballot in 2001 a bond issue for a new elementary school. Successful passage will bring about reconfiguration in 2003 of the elementary level to grades K-5 and the middle level to grades 6-7.

Table 2 shows the impact of the 1999 reconfiguration and the planned reconfiguration in 2003 upon student enrollment during the six-year forecast period.

**Table 2**
**Projected FTE Student Enrollment by Grade Span**
**Monroe School District 2000-2005**

| Grade Level | 2000 | 2001 | 2002 | 2003 | 2004 | 2005 |
|---|---|---|---|---|---|---|
| Elementary K-4 | 1975 | 2015 | 2022 | | | |
| Elementary K-5 | | | | 2534 | 2568 | 2607 |
| Middle School 5-7 | 1452 | 1495 | 1510 | | | |
| Middle School 6-7 | | | | 1028 | 1059 | 1049 |
| Junior High 8-9 | 959 | 1015 | 1054 | 1133 | 1104 | 1118 |
| High School 10-12 | 1157 | 1188 | 1242 | 1323 | 1442 | 1482 |
| Totals | 5543 | 5713 | 5828 | 6018 | 6173 | 6256 |

Kindergarten @ .5 FTE
Figures based on OSPI data: Report 1049 dated 11/9/99

**20-Year Student Enrollment Projection**

Although 20-year student enrollment projections are highly speculative, they are useful for developing long-range comprehensive land use plans. These long-range enrollment projections may also be used by the District in determining future site acquisition needs. Although data for a 20 year projection was not available, data for the next 12 was available. This data was used in developing the following projections.

Student enrollment projections for the year 2012 are based on the Snohomish County Planning Department's revised distribution by school district of the OFM 20-year population projection. By holding the OSPI projected 2005 FTE student to population ratio of 20% constant through the year 2012, a total enrollment of 6,541 FTE students would be expected by the year 2012. This represents a 21.11% increase over existing 1999 enrollment levels. By holding the projected 2005 student to population ratio constant, it is assumed that there would be no change in demographic trends within the District over the next 12 years.

The total enrollment estimate was then broken down by grade span to evaluate long-term site acquisition needs for elementary, middle, junior high and high school facilities. Enrollment by grade span was determined by using 1999-00 actual enrollment percentages applied to the 2012 total enrollment projection. Projected enrollment by grade span for the year 2012 is provided in Table 3.

**Table 3**
**Monroe School District**
**Year 2012 Projected Enrollment By Grade Span**

| Grade Span | Projected FTE Student Enrollment |
|---|---|
| Elementary (K-5) | 2969 |
| Middle School (6-7) | 1119 |
| Junior High School (8-9) | 994 |
| High School (10-12) | 1459 |
| District Total (K-12) | 6541 |

The OSPI enrollment projections summarized in this chapter will be used to evaluate future school capacity needs. Analysis of future facility and capacity needs is provided in Chapter 6 of this Capital Facilities Plan.

# CHAPTER 4 - DISTRICT EDUCATIONAL PROGRAM STANDARDS

School facility and student capacity needs are dictated by the types and amounts of space required to accommodate the District's adopted educational program. The educational program standards which typically drive facility space needs include grade configuration, optimum facility size, class size, educational program offerings, classroom utilization and scheduling requirements, and use of relocatable classroom facilities (portables).

In addition to factors which affect the amount of space required, government mandates and community expectations affect how classroom space is used. Traditional educational programs offered by school districts are often supplemented by nontraditional, or special programs such as special education, bilingual education, remediation programs, migrant education, alcohol and drug education, AIDS education, preschool and daycare programs, computer labs, music programs, etc. These special or nontraditional educational programs have a significant impact on the available student capacity of school facilities. A recent federal allocation of funds to lower class size in grades K-3 may create a need for additional classrooms.

Examples of special programs offered by the Monroe School District at specific school sites include:

- Special education pre-school
- Special education - resource, moderate and profound
- ESL
- Chapter 1 / LAP
- Drug and Alcohol Education
- Community Schools
- Vocational and Career Education
- Technology Education
- Music
- Day Care - before and after school
- Primary Intervention Program
- Excel
- Adopt-A-Stream
- Outdoor Education
- Horticulture
- Multi-age classrooms

Variations in student capacity among schools are often a result of what special or nontraditional programs are offered at specific schools. These special programs require classroom space which can reduce the permanent capacity of some of the buildings housing these programs. Some students, for example, leave their regular classroom for a short period of time to receive instruction in these special programs. Newer schools within the District have been designed to accommodate most of these programs. However, older schools often require space modifications to accommodate special programs, and in some circumstances, these modifications may reduce the overall classroom capacities of the buildings.

District educational program standards will undoubtedly change in the future as a result of changes in the program year, special programs, class sizes, grade span configurations, and use of new technology, as well as other physical aspects of the school facilities. The school capacity inventory will be reviewed periodically and adjusted for any changes to the educational program standards. These changes will also be reflected in future updates of this Capital Facilities Plan. It should be noted that Monroe School District grade level configurations were modified in September 1999 to meet student needs. These reconfigurations were identified in the 1998 plan aproved by the District and Snohomish County.

The District educational program standards which directly affect school capacity are outlined below for the elementary, middle and high school grade levels.

**Educational Program Standards For Elementary Schools**

- Class size for grades K-4 should not exceed 25 students.
- Special Education for students may be provided in a self-contained classroom or in a separate classroom.
- All students will be provided music instruction in a separate classroom.
- All students will have scheduled time in a computer lab.
- Optimum design capacity for new elementary schools is 500 students. However, actual capacity of individual schools may vary depending on the educational programs offered.

**Educational Program Standards For Middle, Junior and High Schools**

- Class size for middle school grades should not exceed 28 students.
- Class size for junior high school grades should not exceed 28 students.
- Class size for high school grades should not exceed 28 students.
- As a result of scheduling conflicts for student programs, the need for specialized rooms for certain programs, and the need for teachers to have a work space during planning periods, it is not possible to achieve 100% utilization of all regular teaching stations throughout the day.
- Special Education for students may be provided in a self-contained classroom.
- Identified students will also be provided other nontraditional educational opportunities in classrooms designated as follows: Resource Rooms (i.e. computer labs, study rooms); Special Education Classrooms; and Program Specific Classrooms (i.e. music, drama, art, family and consumer science, physical education).
- Desired design capacity for new middle and junior high schools is 750 students. However, actual capacity of individual schools may vary depending on the educational programs offered.
- Desired design capacity for new high schools is 1,400 students. However, actual capacity of individual schools may vary depending on the educational programs offered.

# CHAPTER 5 — CAPITAL FACILITIES INVENTORY

Under the Growth Management Act public entities are required to inventory capital facilities used to serve existing development. Capital facilities are defined as any structure, improvement, piece of equipment or other major asset, including land that has a useful life of at least ten years.[1] The purpose of the facilities inventory is to establish a baseline for determining what facilities will be required to accommodate future demand (student enrollment) at acceptable or established levels of service. This chapter provides an inventory of capital facilities owned and operated by the Monroe School District including schools, relocatable classrooms (portables), developed school sites, undeveloped land and support facilities. School facility capacity was inventoried based on the space required to accommodate the District's adopted educational program standards (see Chapter 4). A map showing locations of District facilities is provided as Figure 5.

**Schools**

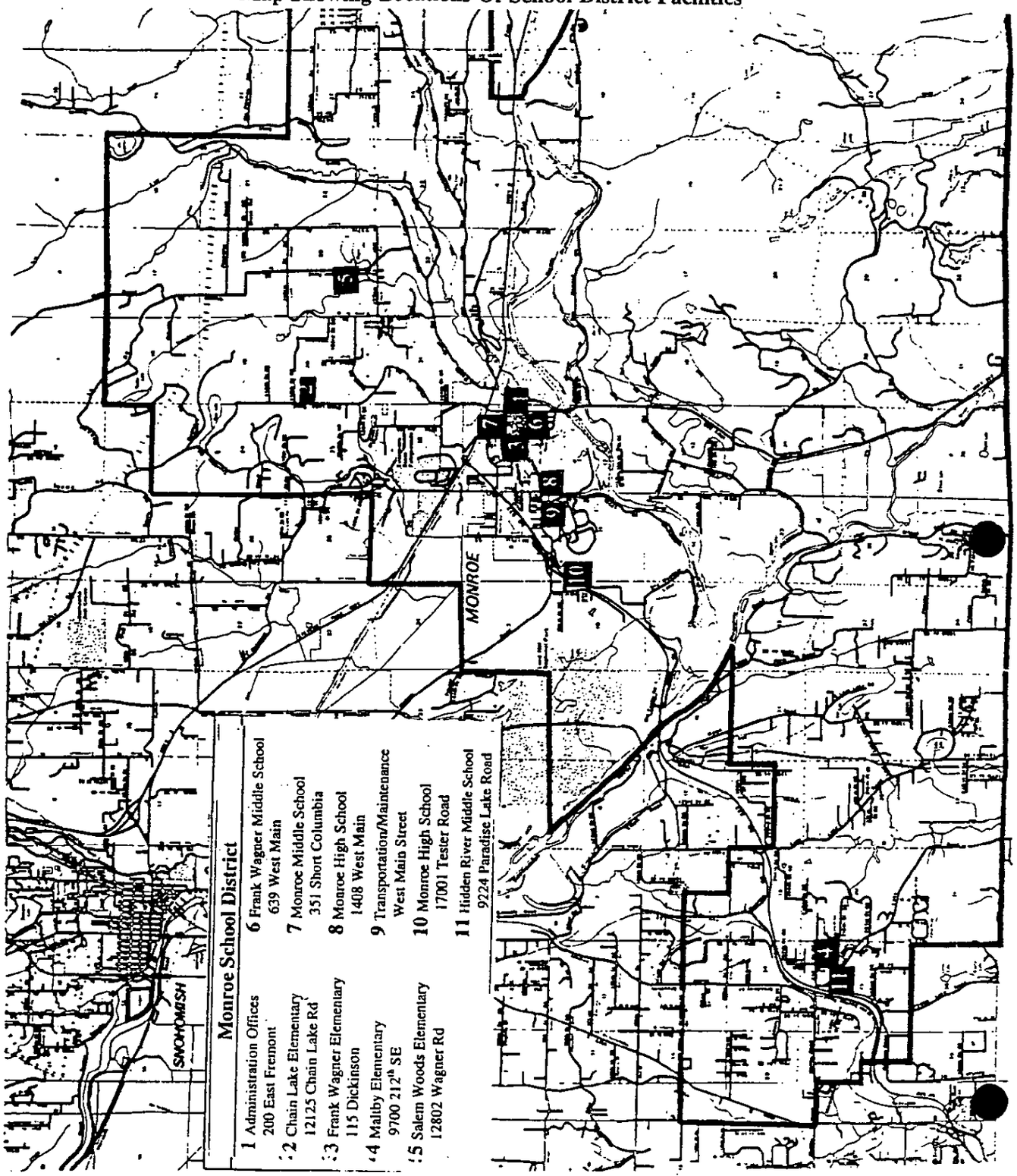
The Monroe School District currently operates four elementary schools serving grades K-4; three middle schools serving grades 5 - 6; one junior high school serving grades 7 – 8 and one high school serving grades 10 - 12. Leaders in Learning, an individualized secondary program, is also offered in a non school facility owned by the District. Sky Valley Education Center, a K-12 individualized program, is operated in a leased facility.

The State (OSPI) calculates school capacity by dividing gross square footage of a building by a standard square footage per student (i.e. 80 square feet per kindergarten through sixth grade student, 110 square feet per grade seven and grade eight student, 120 square feet per grade nine through grade twelve student, and 140 square feet per handicapped student). This method is used by the State as a simple and uniform approach to determining school capacity for purposes of allocating available State Match Funds to school districts for new school construction. However, this method is not an accurate reflection of the actual capacity required to accommodate the adopted educational program of each individual district.

For this reason, school capacity was determined based on the number of teaching stations within each building and the space requirements of the District's adopted educational program. It is this capacity calculation which is used to establish the District's baseline capacity, and determine future capacity needs based on projected student enrollment. The current (2000) school facility inventory is summarized in Tables 4, 5 and 6.

[1] Making Your Comprehensive Plan A Reality - A Capital Facilities Plan Preparation Guide, State of Washington Department of Community Development Growth Management Division, June, 1993, pg. 86.

**Figure 5**
**Map Showing Locations Of School District Facilities**



## Table 4
## Elementary School Capacity Inventory

| Elementary School | Site Size (acres) | Building Area (Sq. Ft.) | Teaching Stations | SPI-rated Student Capacity | Program Student Capacity | Year Built or Last Remodel | Potential for Expansion of Perm. Facility |
|---|---|---|---|---|---|---|---|
| Chain Lake | 14.4 | 46,198 | 21 | 559 | 500 | 1990 | yes |
| Frank Wagner | 5.0 | 46,418 | 22 | 559 | 485 | 1989 | yes |
| Maltby | 10.0 | 42,211 | 22 | 519 | 525 | 1972 | no* |
| Salem Woods | 10.0 | 39,029 | 20 | 479 | 475 | 1980 | no* |
| Totals | 39.4 | 173,856 | 85 | 2116 | 1985 | | |

*Current portables maximize septic system capacity.

## Table 5
## Middle School Capacity Inventory

| Middle School | Site Size (acres) | Building Area (Sq. Ft.) | Teaching Stations | SPI-rated Student Capacity | Program Student Capacity | Year Built or Last Remodel | Potential for Expansion of Perm. Facility |
|---|---|---|---|---|---|---|---|
| Monroe | 3.5 | 83,719 | 35 | 823 | 851 | 1980 | no |
| Frank Wagner | 3.0 | 27,967 | 12 | 263 | 270 | 1980 | yes |
| Hidden River | 15.0 | 38,500 | 17 | 400 | 410 | 1999 | yes |
| Totals | 21.5 | 150,186 | 64 | 1486 | 1531 | | |

## Table 6
## Junior High School Capacity Inventory

| Junior High School | Site Size (acres) | Building Area (Sq. Ft.) | Teaching Stations | SPI-rated Student Capacity | Program Student Capacity | Year Built or Last Remodel | Potential for Expansion of Perm. Facility |
|---|---|---|---|---|---|---|---|
| Monroe | 18.0 | 107,498 | 45 | 888 | 1046 | 1991 | yes |
| Totals | 18.0 | 107,498 | 45 | 888 | 1046 | | |

## Table 7
## High School Capacity Inventory

| High School | Site Size (acres) | Building Area (Sq. Ft.) | Teaching Stations | SPI-rated Student Capacity | Program Student Capacity | Year Built or Last Remodel | Potential for Expansion of Perm. Facility |
|---|---|---|---|---|---|---|---|
| Monroe | 33.0 | 189,000 | 58 | 1200 | 1580 | 1999 | yes |
| Leaders In Learning* | n/a | 1798 | 2 | | | 1998 | No |
| Totals | 33.0 | 189,000 | 60 | 1200 | 1580 | | |

*Leaders In Learning is located in converted storage space.

**Relocatable Classroom Facilities (Portables)**

Relocatable classroom facilities (portables) are used as interim classroom space to house students until funding can be secured to construct permanent classroom facilities. Therefore, these facilities are not included in the school capacity calculations provided in Tables 4, 5 and 6. The Monroe School District currently uses 36 portables at various school sites throughout the District to provide additional interim capacity. A typical portable classroom provides capacity for 25 to 28 students - depending on the grade level and the program being housed. Current use of portables throughout the District is summarized in Table 7.

A potential future problem with portables is the fact that several of the portables are no longer portable. That is, the age and condition of some of the portables is such that they can no longer be moved to another site to relieve over-crowding. They simply would not be able to survive another move. Currently, the District is surveying its portables to determine how many of the current 36 portables can be moved to another site without damaging the portable beyond use. Some portables will soon have to be demolished because of condition.

However, many of the portables have been purchased in the past ten years. These portables can and will be moved from time to time to meet instructional needs and to house students as necessary.

**Table 8**
**Relocatable Classroom (Portable) Inventory**
**2000-2001**

| | Number of Portables | Interim Student Capacity Provided | Building Area (Sq. Ft.) |
|---|---|---|---|
| Chain Lake Elementary | 4 | 100 | 3,572 |
| Frank Wagner Elementary | 6 | 150 | 5,358 |
| Maltby Elementary | 4 | 100 | 3,572 |
| Salem Woods Elementary | 2 | 50 | 1,786 |
| Frank Wagner Middle | 2 | 56 | 1786 |
| Hidden River Middle | 0 | 0 | 0 |
| Monroe Middle | 6 | 168 | 5,358 |
| Monroe Junior High | 6 | 168 | 5358 |
| Monroe High School | 2 | 56 | 1,786 |
| Preschool/Head Start | 3 | 40 | 2,679 |
| Transportation | 1 | 0 | 893 |
| | 36 | 888 | 32,148 |

**Support Facilities**

In addition to schools, the Monroe School District owns and operates additional facilities which provide operational support functions to the schools. An inventory of these facilities is provided in Table 9.

**Table 9**
**Inventory of Support Facilities**

| Facility Name | Site Size (acres) | Building Area (sq ft) |
|---|---|---|
| District Admin Office and Warehouse | 3.5 | 21,584 |
| Maintenance Shops | 0.2 | 3,041 |
| Transportation | 3.4 | 6,612 |
| Totals | 7.1 | 31,237 |

**Land Inventory**

Undeveloped Sites

The Monroe School District owns three undeveloped parcels including approximately 15 acres in the Maltby area adjacent to the newly constructed Hidden River Middle School; 33 acres in the Echo Lake area originally planned for a future elementary and middle school site; and 14.5 acres adjacent to Chain Lake Elementary. The District also has a commitment from the City of Monroe for approximately seven acres (plus the use of a shared play ground area) for a school site in the Fryelands area on the western border of the city.

The Maltby site is projected to be used for a new junior high school. The Echo Lake site is no longer considered suitable for a school site and will soon be placed on the market for sale. The property adjacent to Chain Lake Elementary can be used only if sewers are brought into the area. There are minimal wetlands.

In the future, the District will need at least one additional elementary school within the City of Monroe, an elementary school and one intermediate school site in the area north of Highway 2. The sites for schools north of Highway 2 should be purchased in the near future while property may still be available.

**Table 10**
**Current Grade Level Assignments for District Schools**

| School | September, 2000 Grade Level Configuration |
|---|---|
| Chain Lake Elementary | K-4 |
| Frank Wagner Elementary | K-4 |
| Maltby Elementary | K-4 |
| Salem Woods Elementary | K-4 |
| Frank Wagner Middle | 5-7 |
| Hidden River Middle | 5-7 |
| Monroe Middle | 5-7 |
| Monroe Junior High | 8-9 |
| Monroe High School | 10-12 |
| Sky Valley Education Center | K-12 |

Table 10 shows the current grade level configurations; table 11 shows current school capacity.

# Table 11
## 2000 School Capacity
## As Determined by Educational Program and Number of Classrooms (K @ .5)

**LEGEND:** K = Kindergarten, SE = Special Education, CR = Classroom, S = Student
Classroom = teaching spaces where students are assigned daily

**ELEMENTARY SCHOOLS**

| School | # of classrooms and students by grade | | | | | | | | | |
|---|---|---|---|---|---|---|---|---|---|---|
| | K | | Grades 1-4 | | SE | | Program Capacity | Portables | | Total |
| | CR | S | CR | S | CR | S | | CR | S | |
| CLE | 2 | 50 | 18 | 450 | 1 | 0 | 500 | 4 | 100 | 600 |
| FWE | 4 | 100 | 15 | 375 | 3 | 10 | 485 | 4 | 100 | 585 |
| SWE | 2 | 50 | 17 | 425 | 1 | 0 | 475 | 2 | 50 | 525 |
| PRE | | | | | | | | 2 | 40 | 40 |
| Totals | | 200 | | 1250 | | 10 | 1460 | | 290 | 1750 |

**MIDDLE LEVEL SCHOOLS**

| School | # of classrooms and students by grade | | | | | | | | Totals | |
|---|---|---|---|---|---|---|---|---|---|---|
| | Grades 5-7 | | SE | | Program Capacity | 90% | Portables | | 100% | 90% |
| | CR | S | CR | S | | | CR | S | | |
| MMS | 32 | 896 | 3 | 12 | 908 | 817 | 6 | 168 | 1076 | 968 |
| FWM | 11 | 308 | 1 | 12 | 308 | 277 | 2 | 56 | 364 | 328 |
| Totals | | 1204 | | 24 | 1216 | 1094 | | 224 | 1440 | 1296 |

**MALTBY ELEMENTARY & HIDDEN RIVER MIDDLE SCHOOL**

| School | # of classrooms and students by grade | | | | | | | | | |
|---|---|---|---|---|---|---|---|---|---|---|
| | K | | Grades 1-4 | | SE | | Program Capacity | Portables | | Total |
| | CR | S | CR | S | CR | S | | CR | S | |
| MBE | 2 | 50 | 19 | 475 | 1 | | 525 | 4 | 100 | 625 |
| | | | | | | | | | | |
| | Grades 5-7 | | SE | | Sub Total | 90% | Portables | | Totals | |
| | CR | S | CR | S | | | | | 100% | 90% |
| HRM | 17 | 476 | 1 | 0 | 476 | 428 | | | 476 | 428 |

**MONROE JUNIOR HIGH SCHOOL**

| School | # of classrooms and students by grade | | | | | | | | Totals | |
|---|---|---|---|---|---|---|---|---|---|---|
| | Grades 8-9 | | SE | | Program Capacity | 83% | Portables | | 100% | 83% |
| | CR | S | CR | S | | | CR | S | | |
| MJH | 41 | 1148 | 4 | 48 | 1196 | 993 | 6 | 168 | 1364 | 1132 |

**MONROE HIGH SCHOOL**

| School | # of classrooms and students by grade | | | | | | | | Totals | |
|---|---|---|---|---|---|---|---|---|---|---|
| | Grades 10-12 | | SE | | Program Capacity | 83% | Portables | | 100% | 83% |
| | CR | S | CR | S | | | CR | S | | |
| MHS | 56 | 1568 | 2 | 12 | 1580 | 1311 | 2 | 0 | 1580 | 1311 |

Classroom Loading:

Grades K-4 average classroom loading = 25 students per classroom
Grades 5-12 average classroom loading = 28 students per station (includes music & PE)
Special Education = 12 students per teaching station

Table 12 summarizes the data in Tables 4, 5 and 6 and the impact of the new classrooms itemized in Table 10. The new intermediate school in Maltby added 17 classrooms to house students in grades 5-7. The new high school added 58 teaching stations to the District level. Table 12 also assumes the opening of a new elementary school in 2003.

**Table 12**
**Classrooms Available for Instructional Use in**
**Monroe School District**
**2000 – 2005**

| Grade Span | No. Classrooms 2000 - 2005 |
|---|---|
| Elementary K-5 | 205 |
| Middle School 6-7 | 64 |
| Junior High School 8-9 | 45 |
| High School 10-12 | 58 |
| Total | 372 |

## Near-Term Facility Needs (through 2005)

Schools

Projected available student capacity was derived by subtracting projected FTE student enrollment from existing September, 1999 school capacity for each of the six years in the forecast period. To determine future facility needs, existing school program capacity was compared to projected enrollment throughout the six-year forecast period. Table 13 shows the difference between student capacity (Table 11) and the projected student enrollment throughout the six year forecast period (Table 2). It is not the District's policy to include portable classroom units when determining future capital facility needs; therefore interim capacity provided by portables is not included (Information on portables and interim capacity can be found in Table 7).

**Table 13**
**Available Student Capacity**
**Monroe School District 2000 - 2005**

| | Capacity Surplus or (Deficiency) | | | | | | | |
|---|---|---|---|---|---|---|---|---|
| Grade Span | 1999 | 2000 | 2001 | 2002 | 2003 | 2004 | 2005 | Program Capacity Numbers |
| | | | | | | | | |
| Elementary (K-4) | 19 | 10 | (30) | (37) | | | | 1985 |
| Elementary (K-5) | | | | | (49) | (83) | (122) | 2485 |
| Middle School (5-7) | 120 | 70 | 27 | (34) | | | | 1522 |
| Middle School (6-7) | | | | | 494 | 463 | 473 | 1522 |
| Junior High School (8-9) | 171 | 34 | (22) | (61) | (140) | (111) | (125) | 993 |
| High School (10-12) | 105 | 154 | 123 | 69 | (12) | (131) | (171) | 1311 |

Assumes opening of new elementary school in 2003.

This data includes continued use of Frank Wagner Middle School in 2000 and thereafter as a middle school.

The opening of Hidden River Middle School and the new Monroe High School in September, 1999 is projected to meet the District's student housing needs through 2002. The District will need to add classroom space by 2003. Changes could also occur to these numbers if housing construction increases substantially. The state's funding of the primary (K-3) grades will impact the number of classrooms needed, as will any federally funded mandates to lower class size.

## Secondary Classroom Utilization Effect on Student Housing

At the secondary level it is impossible to utilize all classrooms 100 percent of the time. This is a result of the number of classes offered in different subject areas, the classroom's use for alternate

learning activities (an instrumental music room when not in use can not be used for chemistry, etc.) and student sign-ups.

Therefore, the Monroe School District at grades 5-7 only expects about 90 percent utilization. At grades 8-12, utilization decreases to 83 percent. These are accepted utilization rates across many school districts.

Thus, when considering acceptable classroom utilization levels, Monroe schools will have capacity to house their projected student population through 2002. Space at the elementary, middle school and junior high school levels is becoming "tight" toward the end of this planning period.

**Long Range Facility Needs (Years 2005 to 2012)**

Projected student enrollment can be housed through 2002 with the new schools opened in September 1999. However, because most of the growth is occurring within and north of the City of Monroe, new elementary classrooms are projected for completion in 2003. When the current grade level ratio of students is projected against the 2012 projected enrollment, and with the opening of a new elementary school in 2003, the District is expected to have unhoused students at the elementary and high school levels.

**Table 14**
**Long Range Projection of Unhoused Students for Year 2012**

| Grade Span | Percent of 1999 Enrollment | 2012 Projected Enrollment | Projected Student Capacity In 2003* | Projected Unhoused Students |
|---|---|---|---|---|
| Elementary K-5 | 45.5% | 2976 | 2485 | (491) |
| Middle 6-7 | 17.5% | 1112 | 1533 | 421 |
| Junior High 8-9 | 15.0% | 994 | 993 | (1) |
| High School 10-12 | 22.0% | 1459 | 1311 | (148) |
| Total | 100% | 6541 | 6322 | (219) |

Assumes opening of new elementary school with 20 classrooms in 2003.

In order to provide capacity for these students, the District will have to construct additional classrooms at the elementary and high school levels, or reconfigure grade levels. (It should also be noted that the District's enrollment projections (Appendix A-3) are less conservative than either the OSPI or the population-based forecast and, if realized, would result in more unhoused students.)

With this increased student growth, the District will also have to consider the following:

1. Moving remaining maintenance and grounds functions away from the transportation site.
2. Expanding the existing or obtaining a new, larger transportation site or a second site to store part of the bus fleet during non-driving hours.

3. Expanding and/or relocating the existing central administrative offices.
4. Monitoring student housing to determine if further grade level reconfigurations are needed to best utilize current facilities.

Each of these possibilities hold the potential for required additions or modifications to existing facilities or sites.

To meet future construction needs, the District should consider acquiring additional sites now for future construction. A detailed discussion of planned construction and improvements prior to the year 2005 can be found in the next chapter of this Capital Facilities Plan.

The Monroe School District completed two schools and and several other construction projects in 1999.

### New School Construction

The District currently perceives the need to construct 20 classrooms and supporting spaces within the next two years. A growth-related new school construction project is summarized in Table 15. The primary source of funding for this project will be from a locally approved bond issue to be placed on the ballot in Spring 2001, supplemented by mitigation fees.

**Table 15**
**Growth-Related Planned Construction Projects**

| Project | Estimated Completion Date | Student Capacity Added | Estimated Project Cost* |
|---|---|---|---|
| Fryelands Elementary | 2003 | 500 | $8 million |
| Total | | 500 | $8 million |

*Construction costs are based on architects' estimates, $110 per square foot. Some elementary schools recently completed in Snohomish County have cost in excess of $8,000,000. Construction costs may vary depending upon site usage.

Upon completion of the planned construction project in 2003, and reconfiguration of grades to K-5 and 6-7, the District will have enough capacity to house all of the projected students through the projection period.

### Interim Classroom Facilities (Portables)

The Monroe School District will attempt to minimize the purchase of portable classrooms. Portables will always be needed to handle upswings in student enrollment. Issues with portables have been discussed in Chapter 5 of this report. Some of the oldest portables should be surplused and sold or demolished.

### Site Acquisition and Improvements

The Monroe School District will continue to need elementary sites through 2012. The District previously had plans to construct an elementary and middle school on the Echo Lake site, and a new junior high school on the Maltby site. The Echo Lake site is no longer considered suitable as a school site and will be offered for sale. The third site, located near Chain Lake, has some limitations as a future school site due to lack of sewers. Although the Chain Lake site has developmental constraints for new construction, it may be possible to expand some classrooms at Chain Lake Elementary or to use the site for administration, maintenance or transportation needs in the future. The District restructured grade configurations and school grade level assignments in 1999. During the course of this six year plan, the District should purchase an elementary school and an intermediate school site north of Highway 2 in an area just recently annexed to the

City of Monroe. Also, the District will be planning for the additional classroom and support space which will be needed at the Maltby Intermediate School.

**Space Modifications For Increased Capacity**

The Monroe School District will need to modify spaces in existing schools that are not currently used as teaching stations. These modifications will convert these non-teaching spaces into teaching stations. One example would be the conversion of locker rooms, conference rooms and storage areas into classroom space. These type of housing projects will be funded with the revenue from mitigation fees.

**Support Facility Needs**

With continued growth, the Monroe School District will need to move Maintenance and Grounds Services to an alternative site. It is currently housed at the transportation compound. Additional administrative space will also be required. Current administration space is in the oldest facility in the District and does not meet the needs of the programs, staff or community. The transportation site is too small to accommodate an expanding bus fleet and needs additional space.

Funding of school facilities is typically secured from a number of sources including voter approved bonds, state matching funds and development impact (mitigation) fees. Each of these funding sources is discussed in greater detail below.

**General Obligation Bonds**

Bonds are typically used to fund construction of new schools and other capital improvement projects. A 60% voter approval is required to pass a bond. Bonds are then retired through collection of property taxes. The Monroe School District passed a capital improvements bond for $10.8 million in 1987. Revenues from this bond were used to construct Frank Wagner Elementary, Chain Lake Elementary, additions to Monroe High School, new roofs and insulation at three schools, a playshed at Maltby Elementary, and other smaller projects. A more recent bond was passed in 1996 for $24 million. It was used for the construction of a new high school and an intermediate school in the Maltby area, both of which opened in September 1999. It also funded several other projects. The District will place on the ballot during Spring 2001a bond issue for $8,000,000 for a new elementary school in the Fryelands area.

**State Match Funds**

State Match Funds come from the Common School Construction Fund. Bonds are sold on behalf of the fund then retired from revenues accruing predominantly from the sale of renewable resources (i.e. timber) from state school lands set aside by the Enabling Act of 1889. If these sources are insufficient to meet needs, the Legislature can appropriate general funds, or the State Board of Education can establish a moratorium on certain projects.

School districts may qualify for state matching funds for specific capital projects based on a prioritization system (currently undergoing revision by the State Board of Education). This system prioritizes allocation of available funding resources to school districts statewide based on several prioritization categories. Funds are then disbursed to the districts based on a formula which calculates district assessed valuation per pupil relative to the whole state assessed valuation per pupil to establish the ratio of the total project cost to be paid by the state. The state contribution can range from less than half to more than seventy percent of the project's cost.[2]

State match funds can only be applied to school construction projects. Site acquisition and improvements are not eligible to receive matching funds from the state. Because availability of state match funds has not been able to keep pace with the rapid enrollment growth occurring in many of Washington's school districts, matching funds from the state may not be received by a school district until two to three years after a school has been constructed. In such cases, the District must "front fund" a project. That is, the District must finance the complete project with local funds (the future State's share coming from funds allocated to future District projects).

[2] Paying for Growth's Impacts - A Guide To Impact Fees, State of Washington Department of Community Development Growth Management Division, January, 1992, Pg. 30.

When the State share is finally disbursed (without accounting for escalation) the future District project is (partially) reimbursed.

**Impact Fees**

Development impact fees have been adopted by a number of jurisdictions as a means of supplementing traditional funding sources for construction of public facilities needed to accommodate new development. School impact fees are generally collected by the permitting agency at the time building permits or certificates of occupancy are issued. A detailed discussion on impact fees is provided in Chapter 9.

The Six-Year Finance Plan, shown in Table 16, demonstrates how the Monroe School District intends to fund new construction and improvements to school facilities for the years 2000 through 2005. The financing components include funding through voter approved bonds and development impact fees collected under the State Growth Management Act, and voluntary mitigation fees paid pursuant to the State Environmental Policy Act (SEPA).

**Table 16**
**Monroe School District**
**Six-Year Finance Plan (2000 - 2005)**

| Estimated Project Cost by Year (in $millions) | | | | | | | | | | |
|---|---|---|---|---|---|---|---|---|---|---|
| Construction Project | 2000 | 2001 | 2002 | 2003 | 2004 | 2005 | Total | Bond[1] | State[2] Match | Local[3] |
| New Elementary School | | | | $ 8.0 | | | $ 8.0 | $8.0 | | |
| Elementary Site | | | $ 1.8 | | | | $ 1.8 | | | $ 1.8 |
| Middle School Site | | | $ 3.0 | | | | $ 3.0 | | | $ 3.0 |
| Additional Space - Building Remodel | | | | $ 1.0 | | | $ 1.0 | | | $ 1.0 |
| Totals | $ - | $ - | $ 4.8 | $ 9.0 | | | $ 13.8 | $8.0 | $ - | $5.8 |
| Cumulative Totals | | | $ 4.8 | $ 13.8 | $ 13.8 | $ 13.8 | | | | |

Source: Monroe School District

[1] These are funds from approved bond issues.

[2] The District does not anticipate state match in 2003. District projected K-4 FTE population at 2002 (OSPI projection Appendix A-6) is less than OSPI rated building capacity (Appendix B-1).

[3] Local refers to mitigation receipts.

## School Impact Fees in Snohomish County

The State Environmental Policy Act (SEPA) authorizes jurisdictions to require mitigation for impacts directly related to a proposed development. Impacts to schools resulting from new residential development have been mitigated through voluntary agreements negotiated on a case-by-case basis and most recently, under Snohomish County's school mitigation ordinance, Title 26C SCC.

Title 26C became effective May 1, 1991 and authorized collection of impact fees from residential developments in unincorporated Snohomish County. Title 26C was most recently amended by the Snohomish Council on November 17, 1997. Title 26C stipulates school impact mitigation fees must be related to a school district's expansion costs which are a local obligation and are reasonably related to a proposed residential subdivision or development, and must be used to reduce local obligation costs. School districts may use impact fees for improvements to District wide student housing. Section 26C.05.020 also requires annual certification of a school district's impact mitigation fees by the Snohomish County Department of Planning. Impact fees certified under Title 26C for the Monroe School District are summarized in Table 16.

**Table 17**
**Monroe School District**
**Impact Fees Authorized Under Title 26C SCC**
**1993 - 2000**

| Housing Type | 1993 | 1994 | 1995 | 1996 | 1997 | 1998 | 1999 | 2000 |
|---|---|---|---|---|---|---|---|---|
| Single-Family Detached | $2,888.00 | $2,959.00 | $2,906.00 | $2,580.00 | $2,580.00 | $2,580.00 | $2,000.00 | $2,000.00 |
| One-Bedroom Apartment | $1,030.00 | $1,120.00 | $1,100.00 | $303.00 | $308.00 | $309.00 | $55.00 | $55.00 |
| Two + Bedroom Apartment | $2,637.00 | $3,045.00 | $2,993.00 | $1,954.00 | $1,954.00 | $1,954.00 | $1,500.00 | $1,500.00 |

The Monroe School District also receives impact fees from the City of Monroe. The City has approved an ordinance very similar to Title 26C SCC, and has adopted the same impact fee schedule as used by Snohomish County through 1998, retaining the 1998 level through 2000.

## The Role of Impact Fees Under the Washington State Growth Management Act

The Growth Management Act authorizes jurisdictions to collect impact fees to supplement funding of additional public facilities needed to accommodate new development. Impact fees cannot be used for the operation, maintenance, repair, alteration, or replacement of existing capital facilities used to meet existing service demands.[3]

[3] Paying For Growth's Impacts - A Guide To Impact Fees, State of Washington Department of Community Development Growth Management Division, January, 1992.

## Methodology and Variables Used to Calculate School Impact Fees

Impact fees have been calculated based on the District's cost per dwelling unit to purchase land for school sites, make site improvements, construct schools and purchase/install temporary facilities (portables). As required under GMA, credits have also been applied for State Match Funds to be reimbursed to the District, property taxes and capital project funds to be proposed for future bond measures. The formula worksheets used to calculate impact fees for residential development proposed within the Monroe School District are provided in Appendix C. The variables used to calculate the impact fees are described below.

### Population Variables

Student Factor. The student factor (or student generation rate) is the average number of students generated by each housing type - in this case, single-family dwellings and multiple-family dwellings which applies to apartments, condos or duplexes with one bedroom or with two or more bedrooms. Information from various sources was used to determine the number of school age children by dwelling unit type (single family and multi-family).

The Monroe School District is composed predominantly of single family homes, unlike more urban school districts which also include a large number of apartments and condominiums. Therefore, it is difficult to obtain information which may be comparable with other districts.

Three multi-family complexes were contacted regarding school age population. Only one chose to participate in the survey and it is the same complex that participated in the 1998 survey. Therefore, the data regarding multi-family housing is taken from a large (222) unit apartment complex. This complex consists of 210 multi-bedroom units and twelve single bedroom units. The management team of these apartments accurately records information about the sex and age of all apartment occupants. They have provided the District with an accurate and reliable source of data relative to the number of school age students who reside at the complex.

The data for single family housing comes from four separate residential developments. Homes in the newest development are between one to one-and-one-half years old, three years old in the second, seven years old in the third and about 10 years old in the fourth. Nearly all homes (204) were contacted in the newest development. Approximately half of the homes in each of the remaining developments were contacted. A total of 151 homes participated in the survey.

Based on the data, single-family units can be expected to generate an average of 1.000 students per dwelling unit, multi-family units with one bedroom can be expected to generate .150 students per dwelling unit, and multi-family units with two or more bedrooms can be expected to generate .826 students per dwelling unit. These student factors were then proportioned between the elementary, middle and high school grade spans based on the current ratio of grade span enrollment to total enrollment.

**Site Acquisition Cost Variables**

Facility Design Capacity (students). Facility design capacities reflect the District's estimated number of students each school project is designed to accommodate. These figures are based on actual design studies of optimum floor area for new school facilities and projected capacity addition for planned school expansion projects. The District designs new elementary schools to accommodate 500 students, new middle and junior high schools 750 students and new high schools 1,400 students.

Site Size. The site size gives the optimum acreage for each school type based on studies of existing school sites and State School Board Standards. Actual school sites may vary in size depending on the size of parcels available for sale and other site development constraints such as wetlands. When planning for new school sites, the District considers sites of 10 - 14 acres as optimal for construction of new elementary schools, 20 - 25 acres for new middle and junior high schools and 30 - 40 acres for new high schools.

Average Land Cost per Acre. The Monroe School District continually reviews potential facility sites as future sites will be needed to meet District needs in the next twenty years. A site was purchased in 1996 for the new high school. This site cost $15,899 per acre.

Since that time, land costs have continued to escalate in the District. Recent sales of sites suitable for schools have sold for costs ranging from $152,000 to $231,000 per acre within the city limits. Other recent sales in the unincorporated part of the District show recent sales ranging from $20,000 to $30,000 per acre. Also, in the future, the District may have to consider property condemnation in order to find adequate school sites.

For purposes of the CFP, the District will use the figure of $105,000 per acre as the cost of the property which could be purchased as a usable school site.

Average Off-Site Development Cost per Acre. The average off-site development cost gives the cost (per acre) for developing school sites which are not directly related to construction of the school building itself. Costs vary with each site and may include such items as sewer line extensions, water lines, off-site road and frontage improvements. Off-site development costs are not covered by State Match Funds. Off-site development costs vary widely and can represent 10% or more of the total building construction cost. Off-site development costs are included within the total cost figures.

**School Construction Cost Variables**

Total Construction Cost. The total construction cost is the estimated cost of planned projects to accommodate new growth based on planned costs or on actual costs of recently constructed schools. If the District does not have this cost information available, construction costs of similar schools within other school districts will be substituted.

Added Capacity. The added capacity is the amount of student capacity that will be added by construction projects planned for accommodating new student growth.

**State Match Credit Variables**

BOECKH Index. This number is generated by the E.H. Boeckh Company and is used by OSPI as a guideline for determining the area cost allowance for new school construction. The index is an average of a seven-city building cost index for commercial and factory buildings in Washington State, and is adjusted every two months for inflation. The current Boeckh Index is $102.71 (March 2000) per square foot.

State Match Percentage. The state match percentage is the proportion of funds that are provided to the school districts, for specific capital projects, from the state's Common School Construction Fund. These funds are disbursed based on a formula which calculates District assessed valuation per pupil relative to the whole state assessed valuation per pupil to establish the percentage of the total project to be paid by the state. For new construction and additions, if the Monroe School District qualified under OSPI guidelines for matching funds (which it doesn't), it is currently estimated it would receive reimbursement on a matching ratio of 56.9%. However, the money eventually received by the District would not actually be 56.9% of the entire project cost. Historically, the District has received approximately 40.49% of the total project costs.

**Temporary Facility (Portables) Cost Variables**

New Purchase Cost. The new purchase cost is based on actual dollars paid by the District for portable classrooms in the past. The purchase and site installation cost of a portable classroom is estimated at $70,000.

Utilization Period (years). The utilization period is the amount of time that the portable classrooms are needed, usually for a period prior to construction and occupancy of a newly constructed school facility. The utilization period for portables in the Monroe School District is five (5) years.

Amortization Period (years). The amortization period is the fixed number of years over which the cost of the portable is depreciated until it is written off. The Monroe School District uses an Amortization period of 5 years for portables.

Value as Percentage of Purchase Cost. The value as a percentage of the purchase cost is determined by dividing the amortization period by the utilization period.

Student Capacity. Portable classrooms can provide capacity for 25 to 28 students.

**Tax Credit Variables**

Interest Rate (20-year GO Bond). This is the interest rate of return on a 20-year General Obligation Bond and is derived from the bond buyer index. The current interest rate varies from 4.5% to 6.0 % depending on many variables.

Levy Rate. The current levy rate for the Monroe School District is $.001773 per one-thousand dollars ($1,000.00) of assessed valuation in the Bond Redemption Fund.

Average Assessed Value. This figure is based on the District's average assessed value for each type of dwelling unit (single-family and multiple-family). The current average assessed value for single-family detached residential dwellings is $161,331, the average assessed value for multi-family units is $62,622 for 2+ bedroom units and $48,653 for one bedroom units.

Time Remaining on Bonds. This is the average amount of time remaining on Capital Projects/General Obligation Bonds issued by the Monroe School District. The average time remaining on bonds issued by the Monroe School District is thirteen and one-half (13.5) years.

**Other District Credits**

This figure represents the percentage of capital project costs that the District plans to fund with future bond revenues.

**Proposed Monroe School District Impact Fee Schedule**

Using the variables and formula described, impact fees proposed for the Monroe School District are summarized in Table 18. Refer to Appendix C for impact fee calculations.

**Table 18**
**Monroe School District**
**Proposed Impact Fee Schedule**

| Housing Type | Impact Fee Per Unit |
|---|---|
| Single-Family Detached | $2,810.00 |
| Multi-Family (2+bedrooms) | $2,782.00 |
| Multi-Family (one bedroom) | $294.00 |

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Snohomish County Tomorrow Reconciled 2012 Population Forecast by School District.

Snohomish County Code Title 26C, Amended November 17, 1997, Snohomish County Council.

## APPENDIX A
## MONROE SCHOOL DISTRICT
## POPULATION AND ENROLLMENT DATA

Items found in Appendix A include the following:

**A-1** Monroe School District Head County and FTE Count, October 1, 1999.

**A-2** Monroe School District Projected Head Count for October 1, 2000.

**A-3** Monroe School District Enrollment Projection through 2005-2006 (chart, graph and increasing changes)

**A-4** Monroe School District Average Percentage Enrollment by Grade Span

**A-5** Monroe School District Projected FTE Enrollment to 2012

**A-6** Monroe School District Projected Student Enrollment 1999-2005

**A-7** OSPI Projected Enrollment through 2005 (Report 1049)

**A-8** Monroe School District Recent Enrollment Trends

**A-9** Monroe School District Grades K-12 FTE Enrollment (1996 to present)

**A-10** Monroe School District Grades K-4 FTE Enrollment (1996 to present)

**A-11** Monroe School District Grades 5-7 FTE Enrollment (1996 to present)

**A-12** Monroe School District Grades 8-9 FTE Enrollment (1996 to present)

**A-13** Monroe School District Grades 10-12 FTE Enrollment (1996 to present)

# APPENDIX A-1
## Monroe School District
## Head Count and FTE Count
## October 1, 1999

## MONROE SCHOOL DISTRICT
## HEAD COUNT
## ENROLLMENT

DATE 1-Oct-99 Bilingual 110

| | CLE | FWE | MALTBY | SWE | HRM | FWMS | MMS | MJH | MHS | SKY VALLEY | SPED | TOTAL BY GRADE | MHS/SVEC RUNNING START | MHS SNO-ISLE |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| K | 87.00 | 121.00 | 62.00 | 96.00 | | | | | | 11.00 | | 377.00 | | |
| 1 | 75.00 | 116.00 | 91.00 | 123.00 | | | | | | 17.00 | | 422.00 | | |
| 2 | 87.00 | 134.00 | 96.00 | 112.00 | | | | | | 24.00 | | 453.00 | | |
| 3 | 84.00 | 121.00 | 96.00 | 109.00 | | | | | | 23.00 | 2.00 | 435.00 | | |
| 4 | 90.00 | 134.00 | 106.00 | 116.00 | | | | | | 22.00 | | 468.00 | | |
| 5 | | | | | 105.00 | 107.00 | 245.00 | | | 25.00 | | 482.00 | | |
| 6 | | | | | 111.00 | 82.00 | 225.00 | | | 29.00 | | 447.00 | | |
| 7 | | | | | 90.00 | 84.00 | 284.00 | | | 25.00 | 1.00 | 484.00 | | |
| 8 | | | | | | | | 404.00 | | 11.00 | 2.00 | 417.00 | | |
| 9 | | | | | | | | 389.00 | | 16.00 | | 405.00 | | |
| 10 | | | | | | | | 2.00 | 512.00 | 10.00 | 2.00 | 526.00 | | 9.00 |
| 11 | | | | | | | | | 352.00 | 10.00 | | 362.00 | 33.00 | 36.00 |
| 12 | | | | | | | | | 310.00 | 7.00 | 1.00 | 318.00 | 21.00 | 15.00 |
| TOTAL | 423.00 | 626.00 | 451.00 | 556.00 | 306.00 | 273.00 | 754.00 | 795.00 | 1,174.00 | 230.00 | 8.00 | 5,596.00 | 54.00 | 60.00 |

## MONROE SCHOOL DISTRICT
## FTE COUNT
## ENROLLMENT

DATE 1-Oct-99

| | CLE | FWE | MALTBY | SWE | HRM | FWMS | MMS | MJH | MHS | SKY VALLEY | SPED | TOTAL BY GRADE | | |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| K | 43.50 | 60.50 | 31.00 | 48.00 | | | | | | 5.50 | | 188.50 | | |
| 1 | 75.00 | 116.00 | 91.00 | 123.00 | | | | | | 17.00 | | 422.00 | | |
| 2 | 87.00 | 134.00 | 96.00 | 112.00 | | | | | | 24.00 | | 453.00 | | |
| 3 | 84.00 | 121.00 | 96.00 | 109.00 | | | | | | 23.00 | 2.00 | 435.00 | | |
| 4 | 90.00 | 133.58 | 106.00 | 116.00 | | | | | | 22.00 | | 467.58 | 1,966.08 | |
| 5 | | | | | 105.00 | 107.00 | 243.67 | | | 25.00 | | 480.67 | | |
| 6 | | | | | 111.00 | 82.00 | 224.67 | | | 29.00 | | 446.67 | | |
| 7 | | | | | 90.00 | 83.67 | 280.35 | | | 25.00 | 1.00 | 480.02 | 1,407.36 | |
| 8 | | | | | | | | 403.20 | | 10.20 | 2.00 | 415.40 | | |
| 9 | | | | | | | | 389.00 | | 16.00 | | 405.00 | 820.40 | |
| 10 | | | | | | | | 2.00 | 504.00 | 10.00 | 1.40 | 517.40 | | |
| 11 | | | | | | | | | 323.80 | 17.20 | | 341.00 | | |
| 12 | | | | | | | | | 291.20 | 9.00 | 0.40 | 300.60 | 1,159.00 | |
| TOTAL | 379.50 | 565.08 | 420.00 | 508.00 | 306.00 | 272.67 | 748.69 | 794.20 | 1,119.00 | 232.90 | 6.80 | 5,352.84 | 5,352.84 | 0.00 |

## APPENDIX A-2

**Monroe School District**
**Projected Head Count for October 1, 2000**

| | SCHOOL | | | | | | | | | | | |
|---|---|---|---|---|---|---|---|---|---|---|---|---|
| GRADE | CLE | FWE | MALTBY | SWE | FWMS | HRM | MMS | MJH | MHS | LIL | SVEC | TOTAL |
| K | 88 | 120 | 62 | 96 | | | | | | | 5 | 371 |
| 1 | 83 | 120 | 62 | 101 | | | | | | | 17 | 383 |
| 2 | 75 | 116 | 91 | 123 | | | | | | | 24 | 429 |
| 3 | 87 | 134 | 96 | 112 | | | | | | | 23 | 452 |
| 4 | 84 | 121 | 96 | 109 | | | | | | | 22 | 432 |
| 5 | | | | | 116 | 106 | 224 | | | | 25 | 471 |
| 6 | | | | | 99 | 105 | 252 | | | | 29 | 485 |
| 7 | | | | | 82 | 111 | 225 | | | | 25 | 443 |
| 8 | | | | | | | | 454 | | 2 | 10 | 466 |
| 9 | | | | | | | | 401 | | 3 | 16 | 420 |
| 10 | | | | | | | | | 378 | 27 | 9 | 414 |
| 11 | | | | | | | | | 481 | 15 | 16 | 512 |
| 12 | | | | | | | | | 283 | 14 | 9 | 306 |
| TOTALS | 417 | 611 | 407 | 541 | 297 | 322 | 701 | 855 | 1142 | 61 | 230 | 5584 |

# APPENDIX A-3

## MONROE PUBLIC SCHOOLS

**Enrollment Projection Chart Through 2012-2013**

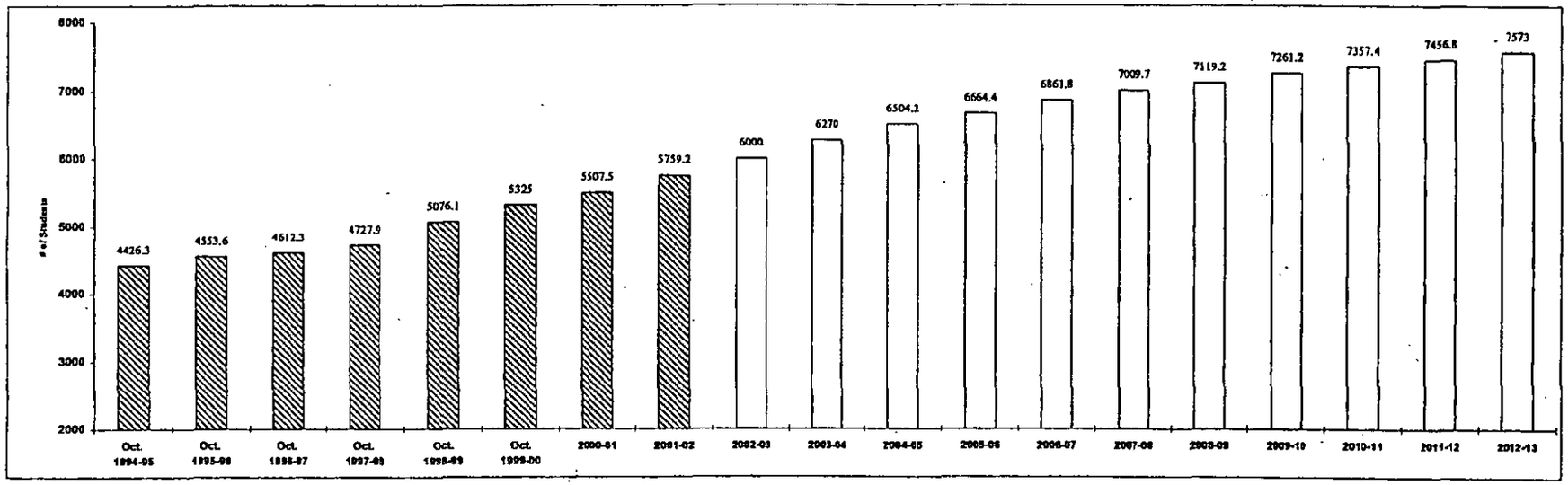
FTE Basis

Grades K-12

| Grade | Increments | 1994-95 | 1995-96 | 1996-97 | 1997-98 | 1998-99 | 1999-00 | 2000-01 | 2001-02 | 2002-03 | 2003-04 | 2004-05 | 2005-06 | 2006-07 | 2007-08 | 2008-09 | 2009-10 | 2010-11 | 2011-12 | 2012-13 |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| K | 1.8% | 168.5 | 194.0 | 163.5 | 180.0 | 190.0 | 187.5 | 190.5 | 193.5 | 196.5 | 199.5 | 202.5 | 205.5 | 208.5 | 211.5 | 214.5 | 217.5 | 220.5 | 223.5 | 226.5 |
| 1 | 128.1% | 355.0 | 394.0 | 406.0 | 371.0 | 425.0 | 435.0 | 422.5 | 436.9 | 444.9 | 448.8 | 455.3 | 463.6 | 470.3 | 476.7 | 483.6 | 490.7 | 497.5 | 504.3 | 511.2 |
| 2 | 6.4% | 416.0 | 364.0 | 402.0 | 408.0 | 408.0 | 465.0 | 458.8 | 449.2 | 470.9 | 477.2 | 478.9 | 487.3 | 497.0 | 503.5 | 510.0 | 517.8 | 525.5 | 532.6 | 539.8 |
| 3 | 7.0% | 348.0 | 415.0 | 362.2 | 438.0 | 451.6 | 437.0 | 495.5 | 497.0 | 485.9 | 506.4 | 513.7 | 516.8 | 525.4 | 535.5 | 542.7 | 549.9 | 558.2 | 566.4 | 574.1 |
| 4 | 2.3% | 382.0 | 358.0 | 415.0 | 356.2 | 456.0 | 470.6 | 444.3 | 505.8 | 512.0 | 499.3 | 518.5 | 526.8 | 530.7 | 539.0 | 549.1 | 556.7 | 564.2 | 572.6 | 581.0 |
| | 2.1% | 1,669.5 | 1,725.0 | 1,748.7 | 1,753.2 | 1,930.6 | 1,995.1 | 2,011.6 | 2,082.4 | 2,110.3 | 2,131.2 | 2,168.9 | 2,200.1 | 2,232.0 | 2,266.1 | 2,299.9 | 2,332.7 | 2,365.8 | 2,399.3 | 2,432.5 |
| 5 | 5.1% | 387.1 | 372.2 | 360.0 | 408.3 | 399.1 | 486.8 | 491.5 | 468.3 | 542.1 | 542.5 | 527.9 | 549.9 | 559.6 | 562.5 | 571.4 | 582.5 | 590.6 | 598.2 | 607.2 |
| 6 | 9.2% | 376.5 | 380.9 | 379.8 | 375.4 | 472.3 | 445.5 | 527.8 | 540.6 | 521.8 | 598.2 | 597.0 | 583.1 | 608.1 | 617.6 | 620.7 | 631.0 | 643.2 | 652.0 | 660.5 |
| 7 | 2.9% | 379.7 | 378.0 | 392.0 | 376.9 | 397.4 | 487.3 | 457.9 | 542.3 | 560.3 | 538.0 | 616.6 | 615.7 | 602.0 | 627.2 | 637.1 | 640.4 | 651.1 | 663.5 | 672.6 |
| | 3.0% | 1,143.3 | 1,131.0 | 1,131.8 | 1,160.5 | 1,268.9 | 1,419.6 | 1,477.2 | 1,551.3 | 1,624.2 | 1,678.7 | 1,741.5 | 1,748.8 | 1,769.7 | 1,807.2 | 1,829.2 | 1,853.9 | 1,884.9 | 1,913.7 | 1,940.3 |
| 8 | 1.6% | 387.5 | 395.4 | 379.2 | 398.9 | 369.1 | 415.2 | 492.7 | 464.0 | 548.9 | 571.7 | 545.6 | 625.9 | 625.2 | 611.8 | 636.7 | 646.9 | 650.4 | 661.2 | 673.8 |
| 9 | 14.7% | 368.0 | 386.2 | 396.8 | 492.0 | 485.0 | 398.8 | 477.2 | 584.3 | 537.3 | 627.7 | 662.7 | 633.8 | 723.2 | 722.1 | 708.4 | 737.0 | 748.1 | 752.3 | 765.1 |
| | 3.8% | 755.5 | 781.6 | 776.0 | 890.9 | 854.1 | 814.0 | 970.0 | 1,048.3 | 1,086.2 | 1,199.4 | 1,208.3 | 1,259.7 | 1,348.5 | 1,333.9 | 1,345.1 | 1,383.9 | 1,398.5 | 1,413.5 | 1,439.0 |
| 10 | -0.9% | 368.6 | 355.4 | 429.4 | 390.6 | 463.2 | 481.0 | 401.7 | 468.3 | 572.9 | 532.0 | 621.3 | 653.1 | 625.2 | 714.5 | 713.0 | 699.0 | 727.5 | 738.7 | 742.7 |
| 11 | -27.5% | 255.0 | 326.4 | 260.2 | 299.0 | 282.2 | 331.6 | 344.7 | 286.4 | 335.8 | 410.0 | 380.7 | 444.4 | 467.5 | 447.4 | 511.3 | 510.2 | 500.2 | 520.6 | 528.6 |
| 12 | -6.8% | 234.4 | 234.2 | 266.2 | 233.8 | 277.2 | 283.7 | 302.3 | 322.5 | 270.6 | 318.8 | 383.5 | 358.3 | 418.9 | 440.5 | 420.7 | 481.5 | 480.5 | 471.0 | 490.1 |
| | 4.2% | 858.0 | 916.0 | 955.8 | 923.4 | 1,022.6 | 1,096.3 | 1,048.8 | 1,077.2 | 1,179.3 | 1,260.7 | 1,385.5 | 1,455.8 | 1,511.7 | 1,602.4 | 1,645.0 | 1,690.7 | 1,708.3 | 1,730.2 | 1,761.3 |
| | 3.0% | 4,426.3 | 4,553.6 | 4,612.3 | 4,727.9 | 5,076.1 | 5,325.0 | 5,507.5 | 5,759.2 | 6,000.0 | 6,270.0 | 6,504.2 | 6,664.4 | 6,861.8 | 7,009.7 | 7,119.2 | 7,261.2 | 7,357.4 | 7,456.8 | 7,573.0 |
| # Change | | | 127.2 | 58.7 | 115.6 | 348.2 | 248.9 | 182.5 | 251.7 | 240.8 | 270.0 | 234.2 | 160.2 | 197.4 | 147.9 | 109.6 | 141.9 | 96.3 | 99.4 | 116.3 |
| % Change | | | 2.87% | 1.29% | 2.51% | 7.36% | 4.90% | 3.43% | 4.57% | 4.18% | 4.50% | 3.74% | 2.46% | 2.96% | 2.16% | 1.56% | 1.99% | 1.33% | 1.35% | 1.56% |

## APPENDIX A-3

**Monroe School District Enrollment Projection Graph Through 2012-13**
**Headcount with Kindergarten at 0.5**
**Grades K-12**



## APPENDIX A-3

MONROE PUBLIC SCHOOLS
Incremental Changes Through 2012-2013
FTE Basis
Grades K-12

| Grade | Increment | 1994-95 | 1995-96 | 1996-97 | 1997-98 | 1998-99 | 1999-00 | 2000-01 | 2001-02 | 2002-03 | 2003-04 | 2004-05 | 2005-06 | 2006-07 | 2007-08 | 2008-09 | 2009-10 | 2010-11 | 2011-12 |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| K | 1.8% | 15.1% | -15.7% | 10.1% | 5.6% | -1.3% | 1.6% | 1.6% | 1.6% | 1.5% | 1.5% | 1.5% | 1.5% | 1.4% | 1.4% | 1.4% | 1.4% | 1.4% | 1.3% |
| 1 | 128.1% | 133.8% | 109.3% | 126.9% | 136.1% | 128.9% | 125.3% | 129.3% | 129.9% | 128.4% | 128.2% | 129.0% | 128.9% | 128.6% | 128.7% | 128.8% | 128.7% | 128.7% | 128.7% |
| 2 | 6.4% | 2.5% | 2.0% | 0.5% | 10.0% | 9.4% | 5.5% | 6.3% | 7.8% | 7.3% | 6.7% | 7.0% | 7.2% | 7.1% | 7.0% | 7.1% | 7.1% | 7.1% | 7.1% |
| 3 | 7.0% | -0.2% | -0.5% | 9.0% | 10.7% | 7.1% | 6.6% | 8.3% | 8.2% | 7.5% | 7.6% | 7.9% | 7.8% | 7.7% | 7.8% | 7.8% | 7.8% | 7.8% | 7.8% |
| 4 | 2.3% | 2.9% | 0.0% | -1.7% | 4.1% | 4.2% | 1.7% | 2.1% | 3.0% | 2.7% | 2.4% | 2.6% | 2.7% | 2.6% | 2.5% | 2.6% | 2.6% | 2.6% | 2.6% |
| | 2.1% | 3.3% | 1.4% | 0.3% | 10.1% | 3.3% | 0.8% | 3.5% | 1.3% | 1.0% | 1.8% | 1.4% | 1.4% | 1.5% | 1.5% | 1.4% | 1.4% | 1.4% | 1.4% |
| 5 | 5.1% | -2.6% | 0.6% | -1.6% | 12.1% | 6.8% | 4.4% | 5.4% | 7.2% | 5.9% | 5.7% | 6.1% | 6.2% | 6.0% | 6.0% | 6.1% | 6.1% | 6.0% | 6.1% |
| 6 | 9.2% | -1.6% | 2.1% | 4.3% | 15.7% | 11.6% | 8.4% | 10.0% | 11.4% | 10.4% | 10.0% | 10.5% | 10.6% | 10.4% | 10.4% | 10.4% | 10.4% | 10.4% | 10.4% |
| 7 | 2.9% | 0.4% | 2.9% | -0.8% | 5.9% | 3.2% | 2.8% | 2.8% | 3.6% | 3.1% | 3.1% | 3.1% | 3.2% | 3.1% | 3.2% | 3.2% | 3.2% | 3.2% | 3.2% |
| | 3.0% | -1.1% | 0.1% | 2.5% | 9.3% | 11.9% | 4.1% | 5.0% | 4.7% | 3.4% | 3.7% | 0.4% | 1.2% | 2.1% | 1.2% | 1.4% | 1.7% | 1.5% | 1.4% |
| 8 | 1.6% | 4.1% | 0.3% | 1.7% | -2.1% | 4.5% | 1.1% | 1.3% | 1.2% | 2.0% | 1.4% | 1.5% | 1.5% | 1.6% | 1.5% | 1.5% | 1.6% | 1.6% | 1.5% |
| 9 | 14.7% | -0.3% | 0.4% | 29.8% | 21.6% | 8.1% | 14.9% | 18.6% | 15.8% | 14.3% | 15.9% | 16.2% | 15.6% | 15.5% | 15.8% | 15.8% | 15.6% | 15.7% | 15.7% |
| | 3.8% | 3.4% | -0.7% | 14.8% | -4.1% | -4.7% | 19.2% | 8.1% | 3.6% | 10.4% | 0.7% | 4.2% | 7.0% | -1.1% | 0.8% | 2.9% | 1.1% | 1.1% | 1.8% |
| 10 | -0.9% | -3.4% | 11.2% | -1.6% | -5.9% | -0.8% | 0.7% | -1.9% | -2.0% | -1.0% | -1.0% | -1.5% | -1.4% | -1.2% | -1.3% | -1.3% | -1.3% | -1.3% | -1.3% |
| 11 | -27.5% | -11.4% | -26.8% | -30.4% | -27.8% | -28.4% | -28.3% | -28.7% | -28.3% | -28.4% | -28.4% | -28.5% | -28.4% | -28.4% | -28.4% | -28.4% | -28.4% | -28.4% | -28.4% |
| 12 | -6.8% | -8.2% | -18.4% | -10.1% | -7.3% | 0.5% | -8.8% | -6.4% | -5.5% | -5.1% | -6.5% | -5.9% | -5.7% | -5.8% | -6.0% | -5.8% | -5.8% | -5.8% | -5.9% |
| | 4.2% | 6.8% | 4.3% | -3.4% | 10.7% | 7.2% | -4.3% | 2.7% | 9.5% | 6.9% | 9.9% | 5.1% | 3.8% | 6.0% | 2.7% | 2.8% | 1.0% | 1.3% | 1.8% |
| | 3.0% | 2.9% | 1.3% | 2.5% | 7.4% | 4.9% | 3.4% | 4.6% | 4.2% | 4.5% | 3.7% | 2.5% | 3.0% | 2.2% | 1.6% | 2.0% | 1.3% | 1.4% | 1.6% |

## APPENDIX A-4

**Monroe School District**
**Average Percentage Enrollment by Grade Span**
**(Based on Actual and Projected FTE Student Enrollment Trends)**

| Enrollment by Grade Span | 1995 | 1996 | 1997 | 1998 | 1999 | 2000 | 2001 | 2002 | 2003 | 2004 | 2005 |
|---|---|---|---|---|---|---|---|---|---|---|---|
| Elementary K-4 | 1725 | 1750 | 1754 | 1931 | 1967 | 2012 | 2082 | 2110 | 2131 | 2169 | 2200 |
| Middle 5-7 | 1135 | 1135 | 1167 | 1276 | 1413 | 1477 | 1551 | 1624 | 1679 | 1742 | 1749 |
| Junior High 8-9 | 786 | 760 | 899 | 860 | 822 | 970 | 1048 | 1086 | 1199 | 1208 | 1260 |
| High School 10-12 | 959 | 1021 | 957 | 1061 | 1206 | 1049 | 1077 | 1179 | 1261 | 1386 | 1456 |
| Totals | 4605 | 4666 | 4777 | 5128 | 5408 | 5508 | 5758 | 5999 | 6270 | 6505 | 6665 |

| Percentage by Grade Span | 1995 | 1996 | 1997 | 1998 | 1999 | 2000 | 2001 | 2002 | 2003 | 2004 | 2005 |
|---|---|---|---|---|---|---|---|---|---|---|---|
| Elementary K-4 | 37.46% | 37.51% | 36.72% | 37.66% | 36.37% | 36.53% | 36.16% | 35.17% | 33.99% | 33.34% | 33.01% |
| Middle 5-7 | 24.65% | 24.32% | 24.43% | 24.88% | 26.13% | 26.82% | 26.94% | 27.07% | 26.78% | 26.78% | 26.24% |
| Junior High 8-9 | 17.07% | 16.29% | 18.82% | 16.77% | 15.20% | 17.61% | 18.20% | 18.10% | 19.12% | 18.57% | 18.90% |
| High School 10-12 | 20.83% | 21.88% | 20.03% | 20.69% | 22.30% | 19.05% | 18.70% | 19.65% | 20.11% | 21.31% | 21.85% |
| Totals | 100.00% | 100.00% | 100.00% | 100.00% | 100.00% | 100.00% | 100.00% | 100.00% | 100.00% | 100.00% | 100.00% |

| Average Percentage by Grade Span 2000 - 2005 | |
|---|---|
| Elementary K-4 | 34.70% |
| Middle 5-7 | 26.77% |
| Junior High 8-9 | 18.42% |
| High School 10-12 | 20.11% |
| Total | 100.00% |

source: OSPI, Monroe School District

## APPENDIX A-5

**Monroe School District**
**Projected FTE Student Enrollment 1995 - 2000 and 2012**
**(Based on Snohomish County Distribution of OFM Population Projection)**

| | 1990 | 1995* | 1996* | 1997* | 1998* | 1999* | 2000 | 2001 | 2012 |
|---|---|---|---|---|---|---|---|---|---|
| Population | 19,703 | 24,860 | 25,762 | 26,687 | 28,155 | 29,101 | 29,378 | 29,655 | 32,703 |
| FTE Student Enrollment | 3,701 | 4,605 | 4,665 | 4,777 | 5,128 | 5,408 | 5,459 | 5,510 | 6,077 |

*actual October 1 FTE student enrollment

Year 2012 FTE Student Enrollment Estimated by Grade Span

| Grade Span | % of Total | FTE Enrollment |
|---|---|---|
| Elementary K-4 | 36.37% | 2210 |
| Intermediate 5-7 | 26.13% | 1588 |
| Middle School 8-9 | 15.20% | 924 |
| High School 10-12 | 22.30% | 1355 |
| Total | 100.00% | 6077 |

Year 2012 Projected Change Over Existing 1999 FTE Enrollment Level:

| | |
|---|---|
| Actual: | 669 |
| Percentage: | 12.37% |

# APPENDIX A-6

**Monroe School District**
**Projected Student Enrollment 1997-2005**
**(OSPI Cohort Survival Model)**

| School Type | Grade Level | School Year | | | | | | |
|---|---|---|---|---|---|---|---|---|
| | | 1999 (1) | 2000 | 2001 | 2002 | 2003 | 2004 | 2005 |
| Elementary | K | 377 | 382 | 388 | 394 | 400 | 406 | 412 |
| | 1 | 422 | 425 | 431 | 438 | 445 | 451 | 458 |
| | 2 | 453 | 440 | 443 | 450 | 457 | 464 | 470 |
| | 3 | 435 | 476 | 463 | 466 | 473 | 481 | 488 |
| | 4 | 468 | 443 | 484 | 471 | 474 | 481 | 490 |
| Grades K-4 Headcount | | 2155 | 2166 | 2209 | 2219 | 2249 | 2283 | 2318 |
| *Grades K-4 FTE (2)* | | 1966.5 | 1975 | 2015 | 2022 | 2049 | 2080 | 2112 |
| Middle School | 5 | 482 | 482 | 456 | 498 | 485 | 488 | 495 |
| | 6 | 447 | 514 | 514 | 487 | 531 | 517 | 521 |
| | 7 | 484 | 456 | 525 | 525 | 497 | 542 | 528 |
| Grades 5-7 Headcount | | 1413 | 1452 | 1495 | 1510 | 1513 | 1547 | 1544 |
| Junior High | 8 | 417 | 493 | 464 | 535 | 535 | 506 | 552 |
| | 9 | 405 | 466 | 551 | 519 | 598 | 598 | 566 |
| Grades 8-9 Headcount | | 822 | 959 | 1015 | 1054 | 1133 | 1104 | 1118 |
| High School | 10 | 526 | 414 | 477 | 564 | 531 | 612 | 612 |
| | 11 | 354 | 412 | 325 | 374 | 442 | 416 | 480 |
| | 12 | 314 | 331 | 386 | 304 | 350 | 414 | 390 |
| Grades 10-12 Headcount | | 1194 | 1157 | 1188 | 1242 | 1323 | 1442 | 1482 |
| Grades K-12 Headcount | | 5584 | 5734 | 5907 | 6025 | 6218 | 6376 | 6462 |
| *Grades K-12 FTE (2)* | | 5395.5 | 5543 | 5713 | 5828 | 6018 | 6173 | 6256 |

source: OSPI, Monroe School District

Notes:
(1) Actual student enrollment as of October 1, 1999
*(2) Assumes half-day attendance for kindergarten students.*

# APPENDIX A-6(1)

**Monroe School District**
**Historical Trends**
**FTE to Population Base Using OSPI Data**

| | 1990 | 1995 | 1996 | 1997 | 1998 | 1999 | 2000 | 2001 | 2002 | 2003 | 2004 | 2005 |
|---|---|---|---|---|---|---|---|---|---|---|---|---|
| Population | 19,703 | 24,860 | 25,762 | 26,687 | 28,155 | 29,101 | 29,378 | 29,655 | 29,932 | 30,209 | 30,486 | 30,763 |
| FTE | 3,701 | 4,605 | 4,665 | 4,777 | 5,128 | 5,408 | 5,543 | 5,713 | 5,828 | 6,018 | 6,173 | 6,256 |
| | 18.8% | 18.5% | 18.1% | 17.9% | 18.2% | 18.6% | 18.9% | 19.3% | 19.5% | 19.9% | 20.2% | 20.3% |

Notes:
1. 1990-1999 Actual FTE Enrollment
2. 2000-2005 OSPI Projections

## APPENDIX A-7

**OSPI Projected Enrollment through 2005 (Report 1049)**

REPORT NO. 1049
RUN ON 10:38 JAN 06 '98

### DETERMINATION OF PROJECTED ENROLLMENTS BY COHORT SURVIVAL

| | —ACTUAL ENROLLMENTS ON OCTOBER FIRST— | | | | | | Average % | —PROJECTED ENROLLMENTS— | | | | | |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| | 94 | 95 | 96 | 97 | 98 | 99 | Survival | 00 | 01 | 02 | 03 | 04 | 05 |
| Kindergarten | 337 | 388 | 327 | 360 | 380 | 377 | | 382 | 388 | 394 | 400 | 406 | 412 |
| Grade 1 | 355 | 394 | 406 | 371 | 425 | 422 | 112.82 | 425 | 431 | 438 | 445 | 451 | 458 |
| Grade 2 | 416 | 364 | 402 | 408 | 408 | 453 | 104.32 | 440 | 443 | 450 | 457 | 464 | 470 |
| Grade 3 | 348 | 415 | 363 | 438 | 452 | 435 | 105.16 | 476 | 463 | 466 | 473 | 481 | 488 |
| Grade 4 | 382 | 358 | 415 | 357 | 456 | 468 | 101.77 | 443 | 484 | 471 | 474 | 481 | 490 |
| Grade 5 | 388 | 373 | 360 | 410 | 400 | 482 | 102.94 | 482 | 456 | 498 | 485 | 488 | 495 |
| Grade 6 | 378 | 384 | 381 | 378 | 474 | 447 | 106.69 | 514 | 514 | 487 | 531 | 517 | 521 |
| K-6 Head Count | 2,604 | 2,676 | 2,654 | 2,722 | 2,995 | 3,084 | | 3,162 | 3,179 | 3,204 | 3,265 | 3,288 | 3,334 |
| K-6 W/K @ .5 | 2,436 | 2,482 | 2,491 | 2,542 | 2,805 | 2,896 | | 2,971 | 2,985 | 3,007 | 3,065 | 3,085 | 3,128 |
| Grade 7 | 384 | 378 | 394 | 379 | 402 | 484 | 102.10 | 456 | 525 | 525 | 497 | 542 | 528 |
| Grade 8 | 389 | 398 | 382 | 403 | 373 | 417 | 101.82 | 493 | 464 | 535 | 535 | 506 | 552 |
| 7-8 Head Count | 773 | 776 | 776 | 782 | 775 | 901 | | 949 | 989 | 1060 | 1032 | 1048 | 1080 |
| Grade 9 | 369 | 388 | 398 | 496 | 487 | 405 | 111.80 | 466 | 551 | 519 | 598 | 598 | 566 |
| Grade 10 | 370 | 356 | 435 | 397 | 472 | 526 | 102.30 | 414 | 477 | 564 | 531 | 612 | 612 |
| Grade 11 | 274 | 344 | 279 | 312 | 294 | 354 | 78.42 | 412 | 325 | 374 | 442 | 416 | 480 |
| Grade 12 | 261 | 259 | 287 | 248 | 295 | 314 | 93.64 | 331 | 386 | 304 | 350 | 414 | 390 |
| 10-12 Head Count | 1,274 | 1,347 | 1,399 | 1,453 | 1,548 | 1,599 | | 1,623 | 1,739 | 1,761 | 1,921 | 2,040 | 2,048 |
| K-12 Head Count | 4,651 | 4,799 | 4,829 | 4,957 | 5,318 | 5,584 | | 5,734 | 5,907 | 6,025 | 6,218 | 6,376 | 6,462 |
| K-12 W/K @ .5 | 4,483 | 4,605 | 4,666 | 4,777 | 5,128 | 5,396 | | 5,543 | 5,713 | 5,828 | 6,018 | 6,173 | 6,256 |

# APPENDIX A-8

## Monroe School District
## Recent Enrollment Trends
## (Based on actual student enrollment as of October 1 of each year)

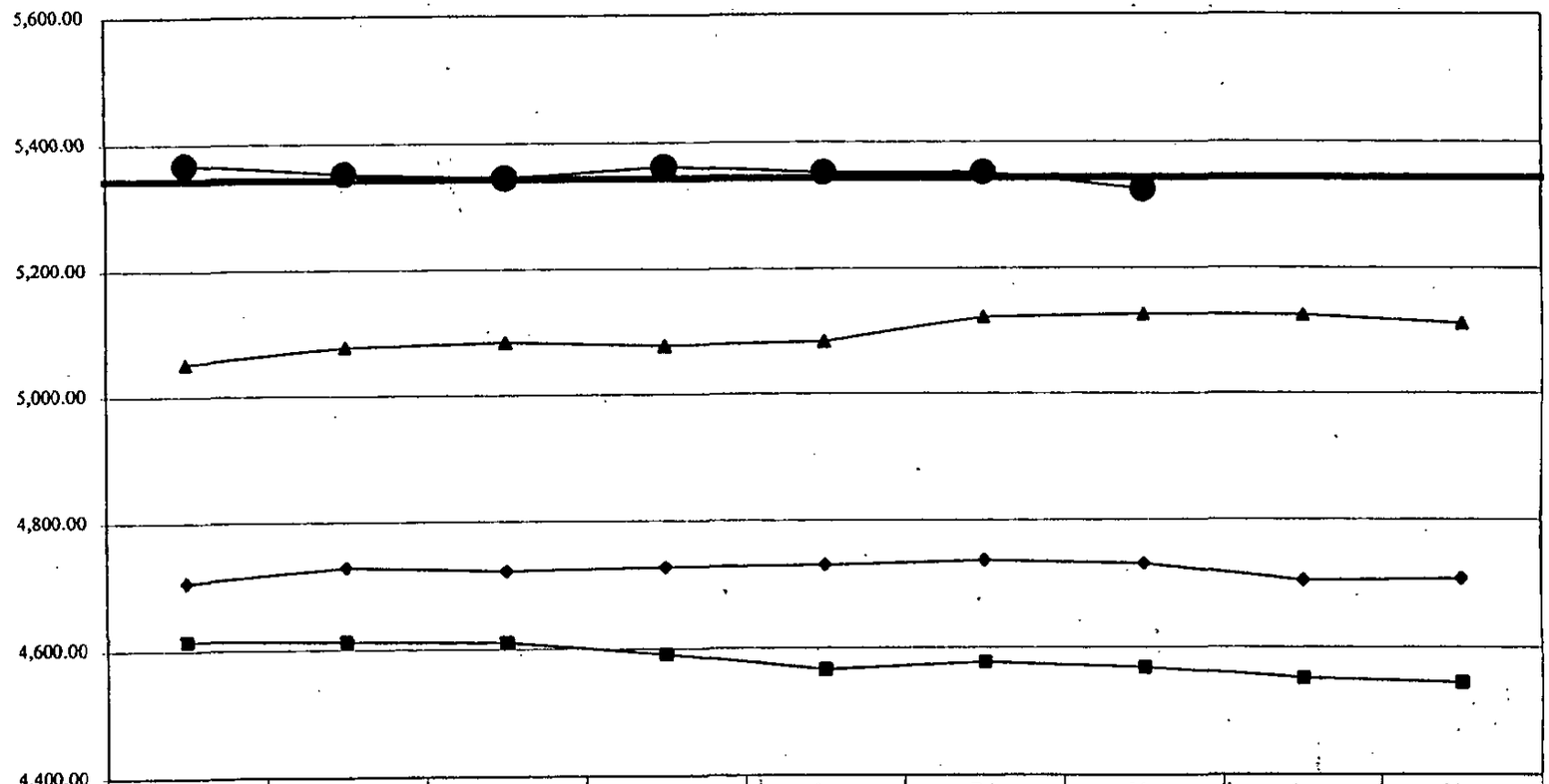
| Grade Span | School Year: 1995 | 1996 | 1997 | 1998 | 1999 | 2000 | 2001 | 2002 | 2003 | 2004 | 2005 | Total | Average Per Year |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| Elementary K-5 | 2292 | 2273 | 2344 | 2521 | *** | *** | *** | *** | *** | *** | *** | *** | *** |
| Actual Change | *** | -19 | 71 | 177 | *** | *** | *** | *** | *** | *** | *** | *** | *** |
| % Change | *** | -0.8% | 3.1% | 7.6% | *** | *** | *** | *** | *** | *** | *** | *** | *** |
| Elementary K-5 FTE [1] | 2098 | 2110 | 2164 | 2331 | *** | *** | *** | *** | *** | *** | *** | *** | *** |
| Actual Change | *** | 12 | 54 | 167 | *** | *** | *** | *** | *** | *** | *** | *** | *** |
| % Change | *** | 0.6% | 2.6% | 7.7% | *** | *** | *** | *** | *** | *** | *** | *** | *** |
| Elementary K-4 | *** | *** | *** | *** | 2155 | 2202 | 2276 | 2307 | 2331 | 2371 | 2406 | | |
| Actual Change | *** | *** | *** | *** | 34 | 47 | 74 | 31 | 24 | 40 | 35 | 285 | 48 |
| % Change | *** | *** | *** | *** | 1.6% | 2.2% | 3.4% | 1.4% | 1.0% | 1.7% | 1.5% | 13.2% | 2.2% |
| Elementary K-4 FTE [1] | *** | *** | *** | *** | 1967 | 2012 | 2083 | 2111 | 2131 | 2169 | 2200 | | |
| Actual Change | *** | *** | *** | *** | 36 | 45 | 71 | 28 | 20 | 38 | 31 | 269 | 45 |
| % Change | *** | *** | *** | *** | 1.9% | 2.3% | 3.5% | 1.3% | 0.9% | 1.8% | 1.4% | 13.7% | 2.3% |
| Middle 5-7 | *** | *** | *** | *** | 1413 | 1477 | 1551 | 1624 | 1679 | 1742 | 1749 | | |
| Actual Change | *** | *** | *** | *** | 137 | 64 | 74 | 73 | 55 | 63 | 7 | 473 | 79 |
| % Change | *** | *** | *** | *** | 10.7% | 4.5% | 5.0% | 4.7% | 3.4% | 3.8% | 0.4% | 33.5% | 5.6% |
| Middle School 6-8 | 1160 | 1157 | 1160 | 1249 | *** | *** | *** | *** | *** | *** | *** | *** | *** |
| Actual Change | *** | -3 | 3 | 89 | *** | *** | *** | *** | *** | *** | *** | *** | *** |
| % Change | *** | -0.3% | 0.3% | 7.7% | *** | *** | *** | *** | *** | *** | *** | *** | *** |
| Junior High 8-9 | *** | *** | *** | *** | 822 | 970 | 1048 | 1086 | 1199 | 1208 | 1260 | *** | *** |
| Actual Change | *** | *** | *** | *** | -38 | 148 | 78 | 38 | 113 | 9 | 52 | 400 | 67 |
| % Change | *** | *** | *** | *** | -4.4% | 18.0% | 8.0% | 3.6% | 10.4% | 0.8% | 4.3% | 48.7% | 8.1% |
| High School 9-12 | 1347 | 1399 | 1453 | 1548 | *** | *** | *** | *** | *** | *** | *** | *** | *** |
| Actual Change | *** | 52 | 54 | 95 | *** | *** | *** | *** | *** | *** | *** | *** | *** |
| % Change | *** | 3.9% | 3.9% | 6.5% | *** | *** | *** | *** | *** | *** | *** | *** | *** |
| High School 10-12 | *** | *** | *** | *** | 1206 | 1049 | 1077 | 1179 | 1261 | 1386 | 1456 | *** | *** |
| Actual Change | *** | *** | *** | *** | 145 | -157 | 28 | 102 | 82 | 125 | 70 | 395 | 66 |
| % Change | *** | *** | *** | *** | 13.7% | -13.0% | 2.7% | 9.5% | 7.0% | 9.9% | 5.1% | 32.8% | 5.5% |
| District Total | 4799 | 4829 | 4957 | 5318 | 5596 | 5698 | 5952 | 6196 | 6470 | 6707 | 6871 | *** | *** |
| Actual Change | *** | 30 | 128 | 361 | 278 | 102 | 254 | 244 | 274 | 237 | 164 | 1553 | 259 |
| % Change | *** | 0.6% | 2.7% | 7.3% | 5.2% | 1.8% | 4.5% | 4.1% | 4.4% | 3.7% | 2.4% | 27.8% | 4.6% |
| District Total (FTE) | 4605 | 4666 | 4777 | 5128 | 5408 | 5508 | 5759 | 6000 | 6270 | 6505 | 6665 | *** | *** |
| Actual Change | *** | 61 | 111 | 351 | 280 | 100 | 251 | 241 | 270 | 235 | 160 | 1537 | 256 |
| % Change | *** | 1.3% | 2.4% | 7.3% | 5.5% | 1.8% | 4.6% | 4.2% | 4.5% | 3.7% | 2.5% | 28.4% | 4.7% |

Source: Superintendent of Public Instruction and Monroe School District

[1] Assumes half-day attendance for kindergarten students.

## APPENDIX A-9

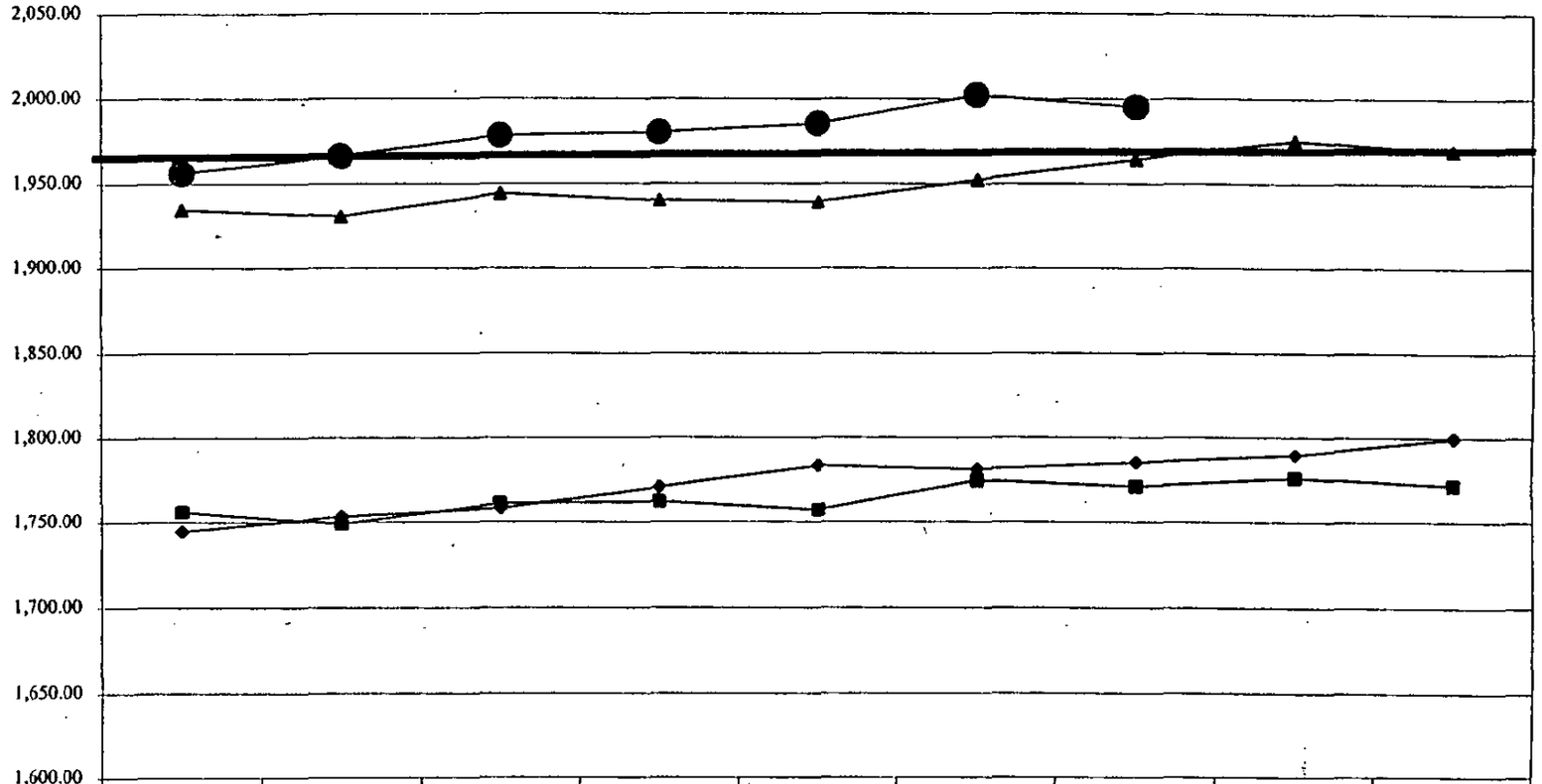
### MONROE PUBLIC SCHOOLS
### K-12 FTE Enrollment




| | Sep | Oct | Nov | Dec | Jan | Feb | Mar | Apr | May |
|---|---|---|---|---|---|---|---|---|---|
| 99-00 FTE | 5,368.08 | 5,352.84 | 5,345.54 | 5,362.14 | 5,352.14 | 5,352.38 | 5,324.98 | | |
| 98-99 FTE | 5,051.89 | 5,076.09 | 5,083.25 | 5,076.85 | 5,082.58 | 5,121.08 | 5,125.91 | 5,124.08 | 5,110.61 |
| 97-98 FTE | 4,705.78 | 4,727.89 | 4,721.54 | 4,726.73 | 4,729.23 | 4,735.80 | 4,730.22 | 4,703.78 | 4,706.79 |
| 96-97 FTE | 4,614.10 | 4,612.26 | 4,610.03 | 4,590.46 | 4,565.80 | 4,576.56 | 4,568.33 | 4,550.99 | 4,544.23 |

## APPENDIX A-10

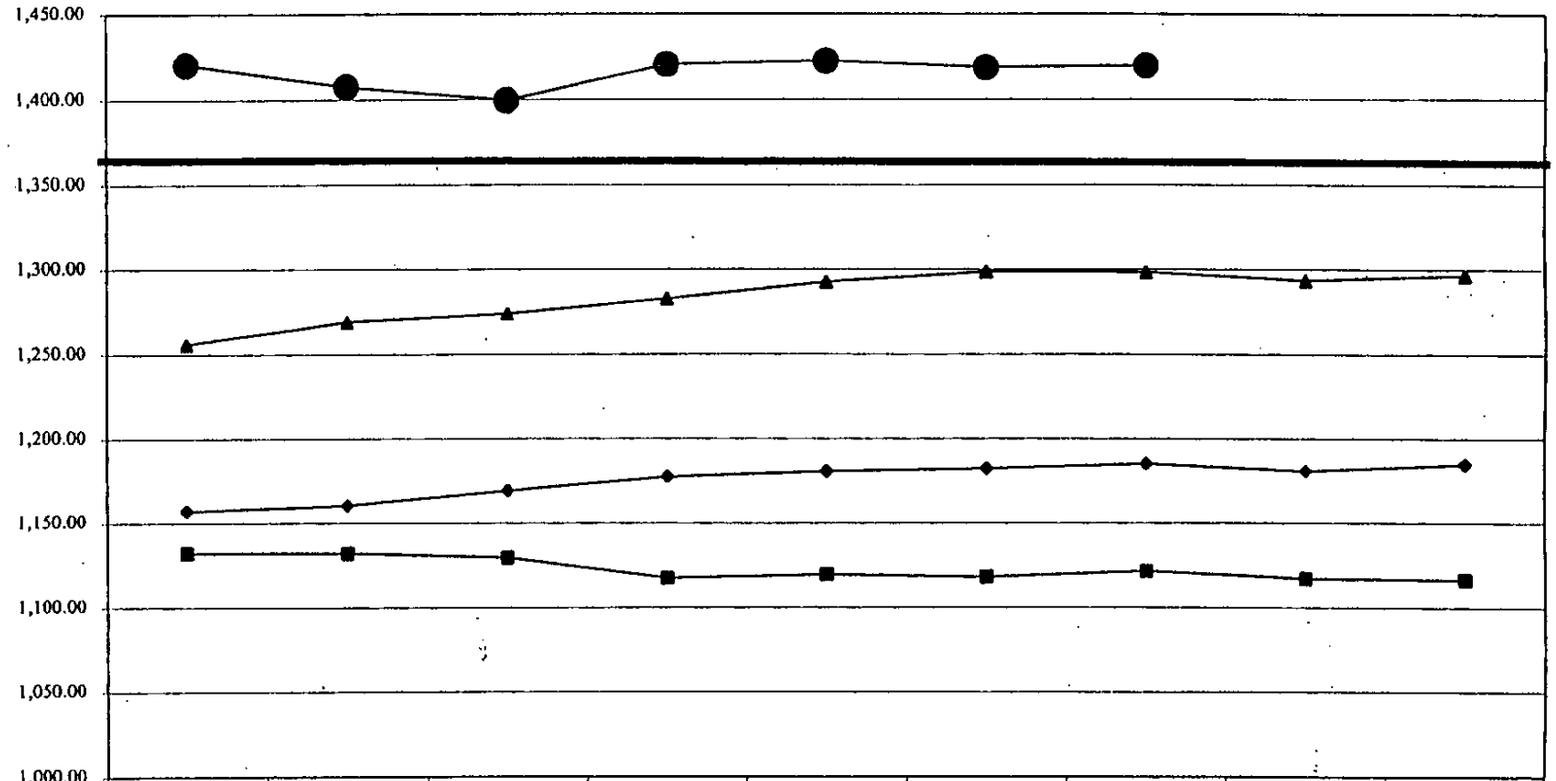
### MONROE PUBLIC SCHOOLS
### K-4 FTE Enrollment




| | Sep | Oct | Nov | Dec | Jan | Feb | Mar | Apr | May |
|---|---|---|---|---|---|---|---|---|---|
| 99-00 FTE | 1,956.08 | 1,966.08 | 1,978.08 | 1,980.08 | 1,985.08 | 2,002.08 | 1,995.08 | | |
| 98-99 FTE | 1,934.58 | 1,930.58 | 1,944.08 | 1,940.08 | 1,939.08 | 1,952.08 | 1,964.08 | 1,975.08 | 1,969.08 |
| 97-98 FTE | 1,744.17 | 1,753.17 | 1,758.19 | 1,770.69 | 1,783.27 | 1,781.08 | 1,785.14 | 1,789.64 | 1,799.58 |
| 96-97 FTE | 1,756.00 | 1,748.67 | 1,761.17 | 1,762.17 | 1,757.17 | 1,774.67 | 1,771.17 | 1,776.17 | 1,771.67 |

## APPENDIX A-11

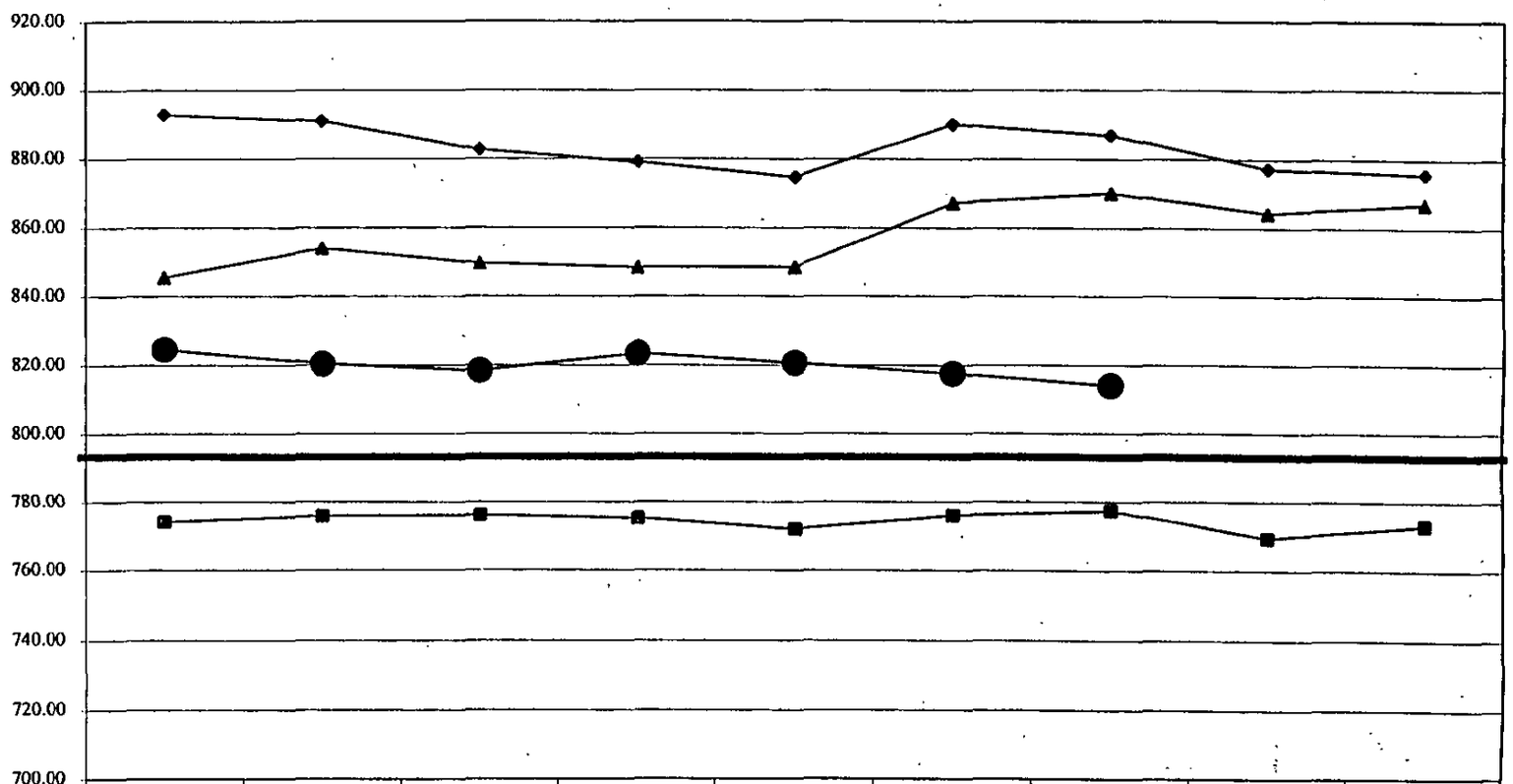
### MONORE PUBLIC SCHOOLS
### 5-7 FTE Enrollment




| | Sep | Oct | Nov | Dec | Jan | Feb | Mar | Apr | May |
|---|---|---|---|---|---|---|---|---|---|
| 99-00 FTE | 1,420.20 | 1,407.36 | 1,399.56 | 1,420.26 | 1,422.26 | 1,418.60 | 1,419.60 | | |
| 98-99 FTE | 1,255.92 | 1,268.86 | 1,273.99 | 1,282.86 | 1,292.53 | 1,298.53 | 1,298.36 | 1,293.53 | 1,296.33 |
| 97-98 FTE | 1,157.32 | 1,160.46 | 1,169.29 | 1,177.62 | 1,180.70 | 1,182.23 | 1,185.23 | 1,180.89 | 1,184.89 |
| 96-97 FTE | 1,131.98 | 1,131.81 | 1,129.31 | 1,117.31 | 1,119.31 | 1,117.97 | 1,121.48 | 1,116.94 | 1,116.28 |

## APPENDIX A-12

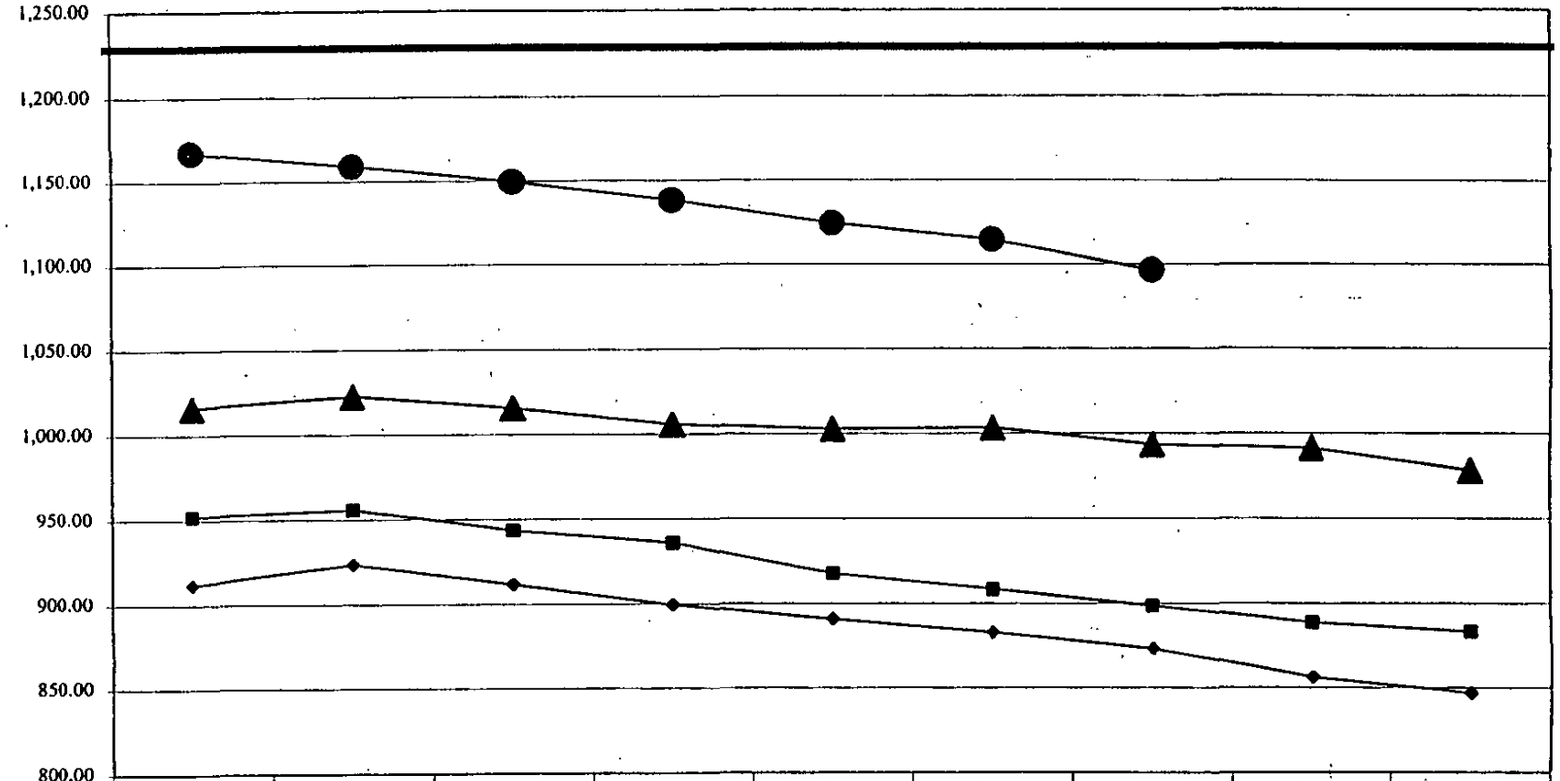
### MONROE PUBLIC SCHOOLS
### 8-9 FTE Enrollment




| | Sep | Oct | Nov | Dec | Jan | Feb | Mar | Apr | May |
|---|---|---|---|---|---|---|---|---|---|
| 99-00 FTE | 824.60 | 820.40 | 818.40 | 823.40 | 820.60 | 817.40 | 814.00 | | |
| 98-99 FTE | 845.39 | 854.05 | 849.58 | 848.31 | 848.37 | 867.07 | 870.07 | 864.27 | 867.00 |
| 97-98 FTE | 892.69 | 890.86 | 882.66 | 879.02 | 874.66 | 889.89 | 886.85 | 877.25 | 875.72 |
| 96-97 FTE | 774.12 | 775.98 | 776.15 | 775.18 | 771.92 | 775.92 | 777.28 | 769.28 | 773.08 |

## APPENDIX A-13

### MONROE PUBLIC SCHOOLS
### 10-12 FTE Enrollment




| | Sep | Oct | Nov | Dec | Jan | Feb | Mar | Apr | May |
|---|---|---|---|---|---|---|---|---|---|
| 99-00 FTE | 1,167.20 | 1,159.00 | 1,149.50 | 1,138.40 | 1,124.20 | 1,114.30 | 1,096.30 | | |
| 98-99 FTE | 1,016.00 | 1,022.60 | 1,015.60 | 1,005.60 | 1,002.60 | 1,003.40 | 993.40 | 991.20 | 978.20 |
| 97-98 FTE | 911.60 | 923.40 | 911.40 | 899.40 | 890.60 | 882.60 | 873.00 | 856.00 | 846.60 |
| 96-97 FTE | 952.00 | 955.80 | 943.40 | 935.80 | 917.40 | 908.00 | 898.40 | 888.60 | 883.20 |

## APPENDIX B
## MONROE SCHOOL DISTRICT
## SCHOOL FACILITY CAPACITY ANALYSIS

Items found in Appendix B include the following:

**B-1** Monroe School District School Capacity as Reported by OSPI

**B-2** Monroe School District 2000 School Capacity

**B-3** Monroe School District Capacities and Enrollment Projections

**B-4** Monroe School District Historical Cost and State Match

# APPENDIX B-1

**Monroe School District**
**School Capacity as Reported by OSPI**
**March, 2000**

| School Name | Grade Span | Teaching Stations* | Bldg Sqft | Hdcp Cap | Reg Cap | Total Capacity |
|---|---|---|---|---|---|---|
| Chain Lake Elementary | K-4 | 20 | 46,198 | 24 | 535 | 559 |
| Frank Wagner Elementary | K-4 | 22 | 46,418 | 12 | 547 | 559 |
| Maltby Elementary | K-4 | 22 | 42,211 | 12 | 507 | 519 |
| Salem Woods Elementary | K-4 | 20 | 39,029 | 12 | 467 | 479 |
| *total elementary* | | *84* | *173,856* | | | *2,116* |
| Monroe Middle | 5-7 | 35 | 83,719 | 36 | 787 | 823 |
| Frank Wagner Middle | 5-7 | 12 | 27,967 | 12 | 238 | 250 |
| *total middle* | | *47* | *111,686* | | *1025* | *1,073* |
| Monroe Junior High School | 8-9 | 44 | 109910 | 36 | 999 | 1035 |
| *total junior high school* | | *44* | *109,910* | | *999* | *1,035* |
| Monroe High | 10-12 | 49 | 180688 | 36 | 1465 | 1501 |
| *total high school* | | *49* | *180,688* | | *1465* | *1,501* |

Hidden River Middle was not a state funded project. It was not included on the OSPI report. The OSPI report will be updated upon receipt of the following information from the district:

| School Name | Grade Span | Teaching Stations* | Bldg Sqft | Hdcp Cap | Reg Cap | Total Capacity |
|---|---|---|---|---|---|---|
| Hidden River Middle | 5-7 | 17 | 38,500 | 12 | 403 | 415 |

# APPENDIX B-2

## Monroe School District
## 2000 School Capacity
## As Determined by Educational Program and Number of Classrooms (K @ .5)

LEGEND: K = Kindergarten, SE = Special Education, CR = Classroom, S = Student
Classroom = teaching spaces where students are assigned daily

### ELEMENTARY SCHOOLS

| School | # of classrooms and students by grade | | | | | | | | | |
|---|---|---|---|---|---|---|---|---|---|---|
| | K | | Grades 1-4 | | SE | | Program Capacity | Portables | | Total |
| | CR | S | CR | S | CR | S | | CR | S | |
| CLE | 2 | 50 | 18 | 450 | 1 | 0 | 500 | 4 | 100 | 600 |
| FWE | 4 | 100 | 15 | 375 | 3 | 10 | 485 | 4 | 100 | 585 |
| SWE | 2 | 50 | 17 | 425 | 1 | 0 | 475 | 2 | 50 | 525 |
| PRE | | | | | | | | 2 | 40 | 40 |
| Totals | | 200 | | 1250 | | 10 | 1460 | | 290 | 1750 |

### MIDDLE LEVEL SCHOOLS

| School | # of classrooms and students by grade | | | | | | | | Totals | |
|---|---|---|---|---|---|---|---|---|---|---|
| | Grades 5-7 | | SE | | Program Capacity | 90% | Portables | | 100% | 90% |
| | CR | S | CR | S | | | CR | S | | |
| MMS | 32 | 896 | 3 | 12 | 908 | 817 | 6 | 168 | 1076 | 968 |
| FWM | 11 | 308 | 1 | 12 | 308 | 277 | 2 | 56 | 364 | 328 |
| Totals | | 1204 | | 24 | 1216 | 1094 | | 224 | 1440 | 1296 |

### MALTBY ELEMENTARY & HIDDEN RIVER MIDDLE SCHOOL

| School | # of classrooms and students by grade | | | | | | | | | |
|---|---|---|---|---|---|---|---|---|---|---|
| | K | | Grades 1-4 | | SE | | Program Capacity | Portables | | Total |
| | CR | S | CR | S | CR | S | | CR | S | |
| MBE | 2 | 50 | 19 | 475 | 1 | | 525 | 4 | 100 | 625 |

| | Grades 5-7 | | SE | | Sub Total | 90% | Portables | | Totals | |
|---|---|---|---|---|---|---|---|---|---|---|
| | CR | S | CR | S | | | | | 100% | 90% |
| HRM | 17 | 476 | 1 | 0 | 476 | 428 | | | 476 | 428 |

### MONROE JUNIOR HIGH SCHOOL

| School | # of classrooms and students by grade | | | | | | | | Totals | |
|---|---|---|---|---|---|---|---|---|---|---|
| | Grades 8-9 | | SE | | Program Capacity | 83% | Portables | | 100% | 83% |
| | CR | S | CR | S | | | CR | S | | |
| MJH | 41 | 1148 | 4 | 48 | 1196 | 993 | 6 | 168 | 1364 | 1132 |

### MONROE HIGH SCHOOL

| School | # of classrooms and students by grade | | | | | | | | Totals | |
|---|---|---|---|---|---|---|---|---|---|---|
| | Grades 10-12 | | SE | | Program Capacity | 83% | Portables | | 100% | 83% |
| | CR | S | CR | S | | | CR | S | | |
| MHS | 56 | 1568 | 2 | 12 | 1580 | 1311 | 2 | 0 | 1580 | 1311 |

Classroom Loading: Grades K-4 average classroom loading = 25 students per classroom
Grades 5-12 average classroom loading = 28 students per station (includes music & PE)
Special Education = 12 students per teaching station

## APPENDIX B-3

**Monroe School District**
**Capacities and Enrollment Projections**

| | | | | | | | | | | | | | | | prepared 03/00 | | |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| | capacities | | 2000 projection | | | | | 2003 projection | | | | | 2005 projection | | | | |
| | w/o port | w/port | N | % w/o | +/- | % w | +/- | N | % w/o | +/- | % w | +/- | N | % w/o | +/- | % w | +/- |
| Monroe Area Schools | | | | | | | | | | | | | | | | | |
| K-4 | 1460 | 1750 | 1532 | 104.9% | -72 | 87.5% | 218 | 1620 | 111.0% | -160 | 92.6% | 130 | 1672 | 114.5% | -212 | 95.5% | 78 |
| 5-7 at 90%* | 1094 | 1296 | 1127 | 103.0% | -33 | 87.0% | 169 | 1283 | 117.3% | -189 | 99.0% | 13 | 1337 | 122.2% | -243 | 103.2% | -41 |
| 8-9 at 83% | 993 | 1132 | 970 | 97.7% | 23 | 85.7% | 162 | 1199 | 120.7% | -206 | 105.9% | -67 | 1260 | 126.9% | -267 | 111.3% | -128 |
| 10-12 at 83% | 1311 | 1311 | 1049 | 80.0% | 262 | 80.0% | 262 | 1261 | 96.2% | 50 | 96.2% | 50 | 1456 | 111.1% | -145 | 111.1% | -145 |
| Maltby Area Schools | | | | | | | | | | | | | | | | | |
| K-4 | 525 | 625 | 480 | 91.4% | 45 | 76.8% | 145 | 511 | 97.3% | 14 | 81.8% | 114 | 528 | 100.6% | -3 | 84.5% | 97 |
| 5-7 at 90% | 403 | N/A | 350 | 86.8% | 53 | N/A | N/A | 396 | 98.3% | 7 | N/A | N/A | 412 | 102.2% | -9 | N/A | N/A |
| | *with use of FWMS | | | | | | | | | | | | | | | | |
| | Note: Two portables are placed at MHS for program reasons not for capacity enhancement. | | | | | | | | | | | | | | | | |

## APPENDIX B-4

### Monroe School District
### Historical Cost and State Match
### New Construction/Additions

| school | year | new cap | total cost | state match received | cost per student | state match % |
|---|---|---|---|---|---|---|
| Chain Lake Elem | 1990 | 550 | $4,845,000 | $1,966,000 | $8,809 | 40.58% |
| Frank Wagner Elem | 1989 | 550 | $4,866,000 | $1,966,000 | $8,847 | 40.40% |
| Maltby Intermediate | 1999 | 400 | $5,800,000 | 0 | $14,500 | 0 |
| MHS Addition [1] | 1991 | 168 | $1,803,000 | $515,000 | $10,732 | 28.56% |
| New High School | 1999 | 1,704 | $33,400,000 | $9,400,000 | $19,601 | 28.14% |

| | |
|---|---|
| 40.49% | equals average state match received for elementary |
| $8,828 | equals average cost per elementary student |
| $14,500 | equals average cost per intermediate student |
| $19,601 | equals average cost per high school student |

[1] Library and new classroom only - these figures are not used for the average calculations.

## APPENDIX C
## MONROE SCHOOL DISTRICT
## IMPACT FEE WORKSHEETS

Items found in Appendix C include the following:

- **C-1** Single Family Residential Worksheet
- **C-2** Multi-Family 2+ Bedroom Residential Worksheet
- **C-3** Multi-Family 1 Bedroom Residential Worksheet

# APPENDIX C-1
## Monroe School District
## Single Family Residential Impact Fee Worksheet

SITE ACQUISITION COST

| | | | | | | | | | | | | |
|---|---|---|---|---|---|---|---|---|---|---|---|---|
| Acres needed | 15.0 | X | cost per acre | $105,000 | capacity (# of students) | 500 | X | student factor | 0.3637 | = | $1,146 | (elementary) |
| Acres needed | 25.0 | X | cost per acre | $105,000 | capacity (# of students) | 750 | X | student factor | 0.2613 | = | $915 | (middle level) |
| Acres needed | 0.0 | X | cost per acre | $105,000 | capacity (# of students) | 750 | X | student factor | 0.1520 | = | $0 | (junior high) |
| Acres needed | 0.0 | X | cost per acre | $105,000 | capacity (# of students) | 1,400 | X | student factor | 0.2230 | = | $0 | (high school) |
| | | | | | | TOTAL SITE ACQUISITION COST | | | | = | $2,060 | |

SCHOOL CONSTRUCTION COST

| | | | | | | | | | | | | |
|---|---|---|---|---|---|---|---|---|---|---|---|---|
| Total construction cost | $8,000,000 | / | | | capacity (# of students) | 500 | X | student factor | 0.3637 | = | $5,819 | (elementary) |
| | | | | | | | | | | | $5,819 | |
| Total Square Feet of Permanent Space (District) | 620,540 | / | Total Square Feet of School Facilities | 651,795 | | | | | | = | 95.20% | |
| | | | | | TOTAL FACILITY CONSTRUCTION COST | | | | | = | $5,540 | |

RELOCATABLE FACILITIES COST (PORTABLES)

| | | | | | | | | | | |
|---|---|---|---|---|---|---|---|---|---|---|
| Portable Cost | $70,000 | / | 25 | facility size | x | student factor | 0.3637 | = | $1,018 | (elementary) |
| Portable Cost | $70,000 | / | 28 | facility size | x | student factor | 0.2613 | = | $653 | (middle level) |
| Portable Cost | $70,000 | / | 28 | facility size | x | student factor | 0.1520 | = | $380 | (junior high) |
| Portable Cost | $70,000 | / | 28 | facility size | x | student factor | 0.2230 | = | $558 | (high school) |
| | | | | | | | | | $2,609 | |
| Total Square Foot of Portable Space | 31,255 | / | Total SQ Ft | 651,795 | | | | | 4.80% | |
| | | | | | TOTAL RELOCATABLE COST ELEMENT | | | = | $125 | |

## APPENDIX C-1 (continued)

CREDIT AGAINST COST CALCULATION-MANDATORY

STATE MATCH CREDIT (NOT ELIGIBLE)

| | | | | | | | |
|---|---|---|---|---|---|---|---|
| BOECKH Index | $102.71 | | | | | | |
| | | | | TOTAL STATE MATCH CREDIT | | = | $0 |

TAX PAYMENT CREDIT

| | | | | | | | |
|---|---|---|---|---|---|---|---|
| [((1 + *interest rate* | 0.0600 )^ | 10 years to payoff bond)- 1 | | ]/ {interest rate | 0.0600 x | | |
| (1 + interest rate | 0.0600 )^ | 10 years to payoff bond) x | | 0.001773 capital levy rate x | | | |
| assessed value | $161,331 | | | TOTAL TAX PAYMENT CREDIT | | = | $2,105 |

SUMMARY CALCULATIONS

| | | |
|---|---|---|
| SITE ACQUISITION COST | | $2,060 |
| FACILITY CONSTRUCTION COST | + | $5,540 |
| RELOCATABLE FACILITIES COST(PORTABL | + | $125 |
| (LESS STATE MATCH CREDIT) | - | $0 |
| (LESS TAX PAYMENT CREDIT) | - | ($2,105) |
| SUBTOTAL | | $5,620 |
| Per Title 26 C 28.010 | x | 0.5 |
| FINAL IMPACT FEE | | $2,810 |

# APPENDIX C-2
## Monroe School District
## Multi-Family 2+ Bedroom Residential Impact Fee Worksheet

SITE ACQUISITION COST

| | | | | | | | | | | | | |
|---|---|---|---|---|---|---|---|---|---|---|---|---|
| Acres needed | 15.0 | X | cost per acre | $105,000 | capacity (# of students) | 500 | X | student factor | 0.3004 | = | $946 | (elementary) |
| Acres needed | 25.0 | X | cost per acre | $105,000 | capacity (# of students) | 750 | X | student factor | 0.2158 | = | $755 | (middle level) |
| Acres needed | 0.0 | X | cost per acre | $105,000 | capacity (# of students) | 750 | X | student factor | 0.1256 | = | $0 | (junior high) |
| Acres needed | 0.0 | X | cost per acre | $105,000 | capacity (# of students) | 1,400 | X | student factor | 0.1842 | = | $0 | (high school) |
| | | | | | | TOTAL SITE ACQUISITION COST | | | | = | $1,702 | |

SCHOOL CONSTRUCTION COST

| | | | | | | | | | | | | |
|---|---|---|---|---|---|---|---|---|---|---|---|---|
| Total construction cost | $8,000,000 | / | | | capacity (# of students) | 500 | X | student factor | 0.3004 | = | $4,806 | (elementary) |
| Total Square Feet of Permanent Space (District) | 620,540 | / | Total Square Feet of School Facilities | 651,795 | | | | | | = | $4,806<br>95.20% | |
| | | | | | TOTAL FACILITY CONSTRUCTION COST | | | | | = | $4,576 | |

RELOCATABLE FACILITIES COST (PORTABLES)

| | | | | | | | | | | | |
|---|---|---|---|---|---|---|---|---|---|---|---|
| Portable Cost | $70,000 | / | 25 | facility size | x | student factor | 0.3004 | = | $841 | (elementary) |
| Portable Cost | $70,000 | / | 28 | facility size | x | student factor | 0.2158 | = | $540 | (middle level) |
| Portable Cost | $70,000 | / | 28 | facility size | x | student factor | 0.1256 | = | $314 | (junior high) |
| Portable Cost | $70,000 | / | 28 | facility size | x | student factor | 0.1842 | = | $461 | (high school) |
| | | | | | | | | | $2,155 | |
| Total Square Foot of Portable Space | 31,255 | / | Total SQ Ft | 651,795 | | | | | 4.80% | |
| | | | | | TOTAL RELOCATABLE COST ELEMENT | | | = | $103 | |

## APPENDIX C-2 (continued)

CREDIT AGAINST COST CALCULATION-MANDATORY

STATE MATCH CREDIT (NOT EILIGIBLE)

| | | | | | | | |
|---|---|---|---|---|---|---|---|
| BOECKH Index | $102.71 | | | | | | |
| | | | | TOTAL STATE MATCH CREDIT | | = | $0 |

TAX PAYMENT CREDIT

| | | | | | | | |
|---|---|---|---|---|---|---|---|
| (((1 + interest rate | 0.0600 | )^ | 10 years to payoff bond)- 1 | | ]/ (interest rate | 0.0600 | x |
| (1 + interest rate | 0.0600 | )^ | 10 years to payoff bond) x | 0.001773 | capital levy rate x | | |
| assessed value | $62,622 | | TOTAL TAX PAYMENT CREDIT | | | = | $817 |

SUMMARY CALCULATIONS

| | | |
|---|---|---|
| SITE ACQUISITION COST | | $1,702 |
| FACILITY CONSTRUCTION COST | + | $4,576 |
| RELOCATABLE FACILITIES COST(PORTABL | + | $103 |
| (LESS STATE MATCH CREDIT) | - | $0 |
| (LESS TAX PAYMENT CREDIT) | - | ($817) |
| SUBTOTAL | | $5,564 |
| Per Title 26 C 28.010 | x | 0.5 |
| FINAL IMPACT FEE | | $2,782 |

# APPENDIX C-3
## Monroe School District
## Multi-Family 1 Bedroom Residential Impact Fee Worksheet

SITE ACQUISITION COST

| | | | | | | | | | | | | |
|---|---|---|---|---|---|---|---|---|---|---|---|---|
| Acres needed | 15.0 | X | cost per acre | $105,000 | capacity (# of students) | 500 | X | student factor | 0.0545 | = | $172 | (elementary) |
| Acres needed | 25.0 | X | cost per acre | $105,000 | capacity (# of students) | 750 | X | student factor | 0.0392 | = | $137 | (middle level) |
| Acres needed | 0.0 | X | cost per acre | $105,000 | capacity (# of students) | 750 | X | student factor | 0.0228 | = | $0 | (junior high) |
| Acres needed | 0.0 | X | cost per acre | $105,000 | capacity (# of students) | 1,400 | X | student factor | 0.0335 | = | $0 | (high school) |
| | | | | | | TOTAL SITE ACQUISITION COST | | | | = | $309 | |

SCHOOL CONSTRUCTION COST

| | | | | | | | | | | | | |
|---|---|---|---|---|---|---|---|---|---|---|---|---|
| Total construction cost | $8,000,000 | / | | | capacity (# of students) | 500 | X | student factor | 0.0545 | = | $872 | (elementary) |
| Total Square Feet of Permanent Space (District) | 620,540 | / | Total Square Feet of School Facilities | 651,795 | | | | | | = | 95.20% | |
| | | | | | TOTAL FACILITY CONSTRUCTION COST | | | | | = | $830 | |

RELOCATABLE FACILITIES COST (PORTABLES)

| | | | | | | | | | | |
|---|---|---|---|---|---|---|---|---|---|---|
| Portable Cost | $70,000 | / | 25 | facility size | x | student factor | 0.0545 | = | $153 | (elementary) |
| Portable Cost | $70,000 | / | 28 | facility size | x | student factor | 0.0392 | = | $98 | (middle level) |
| Portable Cost | $70,000 | / | 28 | facility size | x | student factor | 0.0228 | = | $57 | (junior high) |
| Portable Cost | $70,000 | / | 28 | facility size | x | student factor | 0.0335 | = | $84 | (high school) |
| | | | | | | | | | $391 | |
| Total Square Foot of Portable Space | 31,255 | / | Total SQ Ft | 651,795 | | | | | 4.80% | |
| | | | | | TOTAL RELOCATABLE COST ELEMENT | | | = | $19 | |

## APPENDIX C-3 (continued)

CREDIT AGAINST COST CALCULATION-MANDATORY

STATE MATCH CREDIT (NOT ELIGIBLE)

| | | | | | | | |
|---|---|---|---|---|---|---|---|
| BOECKH Index | $102.71 | | | | | | |
| | | | | TOTAL STATE MATCH CREDIT | | = | $0 |

| | | | | | | | |
|---|---|---|---|---|---|---|---|
| TAX PAYMENT CREDIT | | | | | | | |
| [((1 + interest rate | 0.0600 | )^ | 10 years to payoff bond)- 1 | ]/ (interest rate | 0.0600 | x | |
| (1 + interest rate | 0.0600 | )^ | 10 years to payoff bond) x | 0.001773 | capital levy rate x | | |
| assessed value | $43,653 | | | TOTAL TAX PAYMENT CREDIT | | = | $570 |

SUMMARY CALCULATIONS

| | | |
|---|---|---|
| SITE ACQUISITION COST | | $309 |
| FACILITY CONSTRUCTION COST | + | $830 |
| RELOCATABLE FACILITIES COST(PORTABL | + | $19 |
| (LESS STATE MATCH CREDIT) | - | $0 |
| (LESS TAX PAYMENT CREDIT) | - | ($570) |
| SUBTOTAL | | $588 |
| Per Title 26 C 28.010 | x | 0.5 |
| FINAL IMPACT FEE | | $294 |

# APPENDIX D
# MONROE SCHOOL DISTRICT
# MITIGATION FEE REPORTS

Items found in Appendix D include the following:

**D-1** Mitigation Fee Report to Snohomish County, 1993 - 1999

**D-2** Mitigation Fees Collected and Expended, 1993 - 1999

APPENDIX D-1
Monroe School District
Mitigation Fee Report to Snohomish County, 1993 - 1999

# Monroe School District No. 103
## Mitigation Fee Report
## Unincorporated Snohomish County
## 1993 - 1999

| Year Collected | Amount Collected |
|---|---|
| 1993 | $ 2,728.42 |
| 1994 | $ 2,728.42 |
| 1995 | $ 18,108.35 |
| 1996 | $ 25,587.18 |
| 1997 | $ 88,745.98 |
| 1998 | $ 149,464.34 |
| 1999 | $ 170,996.31 |
| Total | $ 458,359.00 |

Expenditures:

| | | |
|---|---|---|
| 1994-96 | Portable classrooms (applied to purchase of) | $ 49,152.37 |
| 1997-99 | New Monroe High School & Hidden River Middle School Construction Projects (Supplement to Bond issue and state match For High School) | $ 409,206.63 |
| | | $ 458,359.00 |

# APPENDIX D-2
## Monroe School District
## Mitigation Fees Collected and Expended, 1993 - 1999

MONROE SCHOOL DISTRICT NO. 103
MITIGATION FEES
1993-99

**Receipts:**

| | |
|---|---|
| 93-94 | $104,811 |
| 94-95 | $186,813 |
| 95-96 | $477,677 |
| 96-97 | $1,069,712 |
| 97-98 | $945,340 |
| 98-99 | $636,131 |
| 99-00 | $451,045 |
| TOTAL | $3,871,529 |

**Expenditures:**

| | | |
|---|---|---|
| 1 | Portables Salem Woods Elementary (1) & Monroe High School (6) (1996) | $368,691 |
| 2 | Misc. Portable Expenditures (SWE & MHS) | $30,908 |
| 3 | Space Modification at Monroe Middle School | $22,427 |
| 4 | Communication System Modifications at Monroe High School, District Office, Transportation Department. | $48,239 |
| 5 | Land Purchase for New High School (D.O.C.) | $128,000 |
| 6 | Property Purchase Adjoining New High School Land | $83,692 |
| 7 | Portables (1997) for Chain Lake (2) & Frank Wagner Elementary Schools (2) | $163,587 |
| 8 | Misc. Portable Expenditures for CLE and FWE | $19,269 |
| 9 | House Demolition | $6,864 |
| 10 | Space Modification at Monroe Middle School | $36,135 |
| 11 | Applied to New Construction Costs | $2,121,759 |
| 12 | Additional space: former B&G Club | $48,966 |
| 13 | Committed Costs | |
| | a. FWMS space modification | $54,000 |
| | b. Salem Woods space modification | $17,500 |
| | c. FWE space modification | $34,008 |
| | d. System-wide upgrade support (phone system) | $12,000 |
| | e. Maltby space modification | $17,500 |
| | TOTAL | $3,213,545 |

**Balance** $657,984

Exhibit D

# MUKILTEO SCHOOL DISTRICT NO. 6

## CAPITAL FACILITIES PLAN
2000 - 2005

Adopted: April 24, 2000
Prepared: March 30, 2000

# MUKILTEO SCHOOL DISTRICT NO. 6

## CAPITAL FACILITIES PLAN
2000 - 2005

## BOARD OF DIRECTORS

**Kevin Laverty**
**Bruce Miller**
**Judy Schwab**
**Geoff Short**
**Ron Woldeit**

## SUPERINTENDENT

**Gary E. Toothaker, PhD**

For information regarding the Mukilteo School District Capital Facilities Plan, contact the Office of the Superintendent, Mukilteo School District, 9401 Sharon Drive, Everett, Washington 98204, Telephone: (425) 356-1220.

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## APPENDICES

# I. INTRODUCTION

## Purpose of the Capital Facilities Plan

The Washington State Growth Management Act (the "GMA") outlines 13 broad goals including adequate provision of necessary public facilities and services. Schools are among these necessary facilities and services. Public school districts have adopted capital facilities plans to satisfy the requirements of RCW 36.70A.070 and to identify additional school facilities necessary to meet the educational needs of the growing student populations anticipated in their districts.

The Mukilteo School District (the "District") has prepared this Capital Facilities Plan (the "CFP") to provide Snohomish County (the "County"), the City of Mukilteo, and the City of Everett with a description of facilities needed to accommodate projected student. The CFP includes a detailed schedule and financing program for accommodating projected student enrollment at acceptable service levels over the next six years (2000- 2005).

The District prepared its original CFP in 1994 based on the criteria set forth in the GMA. When the County adopted its GMA Comprehensive Plan in 1995, it addressed future school capital facilities plans in Appendix F of the General Policy Plan. Appendix F established the criteria for future updates of the District's CFP.

In accordance with the Growth Management Act and the Snohomish County School Impact Fee Ordinance, this CFP contains the following required elements:

- Future enrollment forecasts for each grade span (elementary, middle and high schools).
- An inventory of existing capital facilities owned by the District, showing the locations and capacities of the facilities.
- A forecast of the future needs for capital facilities and school sites.
- The proposed capacities of expanded or new capital facilities.
- A six-year plan for financing capital facilities within projected funding capacities, which clearly identifies sources of public money for such purposes. The financing plan separates projects and portions of projects which add capacity from those which do not, since the latter are generally not appropriate for impact fee funding.
- A calculation of impact fees to be assessed and support data substantiating said fees.

In developing this CFP, the District followed the following guidelines set forth in Appendix F of the General Policy Plan:

- Information must be obtained from recognized sources, such as the U.S. Census or the Puget Sound Regional Council. School districts may generate their own data if it is derived through statistically reliable methodologies. Information must be

consistent with Office of Financial Management (OFM) population forecasts. Student generation rates must be independently calculated by each school district.

- The CFP must comply with Chapter 36.70A RCW (the Growth Management Act).
- The methodology used to calculate impact fees must comply with Chapter 82.02 RCW. The CFP must identify alternative funding sources in the event that impact fees are not available due to action by the state, county or cities within the District.

When the County adopted its School Impact Fee Ordinance in November 1997, it established the specific criteria for the adoption of a CFP and the assessment of impact fees in the County. Section 3 of the Ordinance defines the requirements for the biennial CFP updates. Table 1 of the Ordinance outlines the formulae for determination of impact fees.

## Overview of the Mukilteo School District

Twenty-six square miles in area, the District encompasses the City of Mukilteo, portions of the City of Everett, and portions of unincorporated Snohomish County. The Mukilteo School District is bordered by the Everett School District to the north and the east and the Edmonds School District to the south.

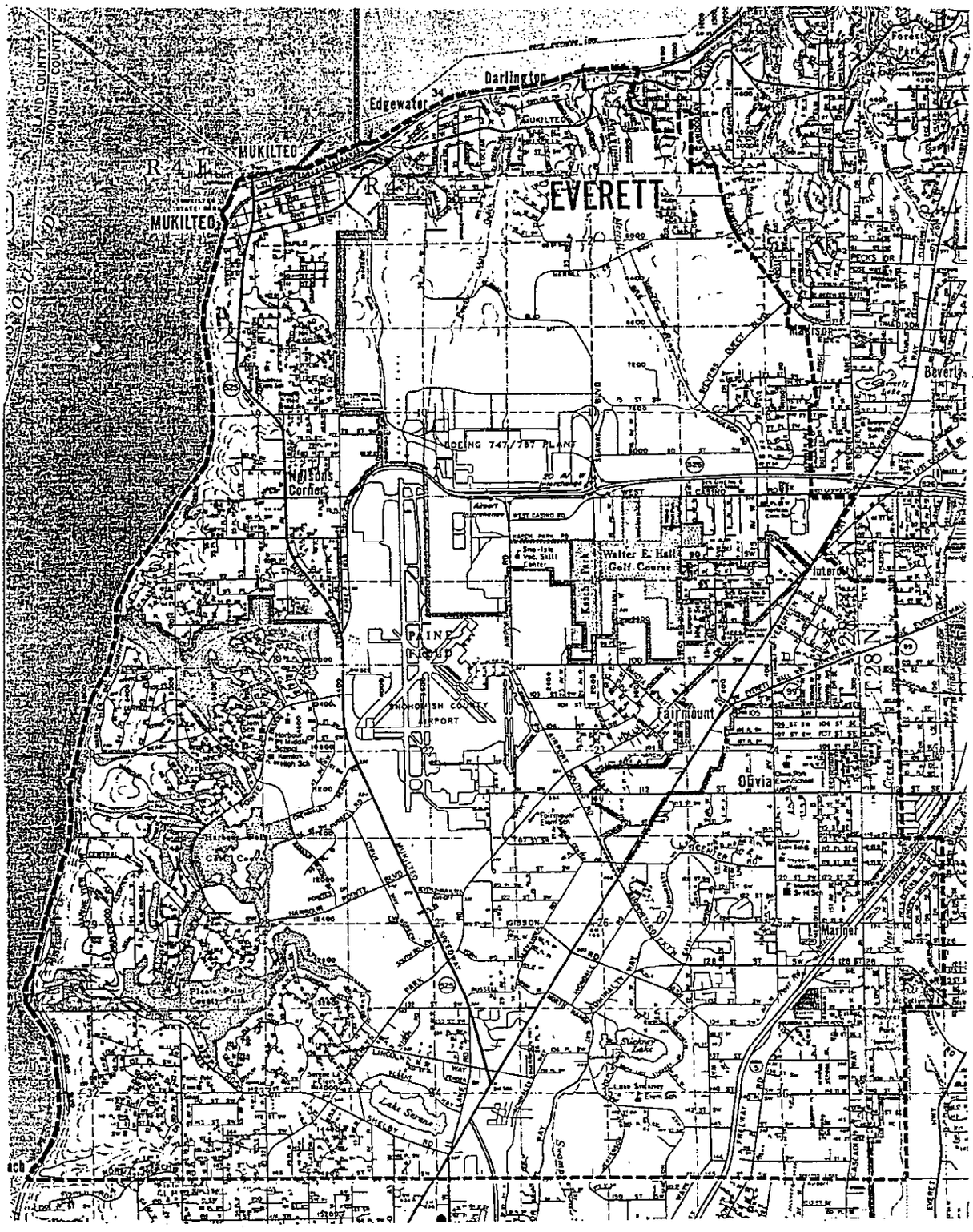
The District serves a student population headcount of 13,287 (October 1999) with 11 elementary schools (grades K-5), four middle schools (grades 6-8), two comprehensive high schools (grades 9-12), and one alternative high school (grades 9-12). For the purposes of facility planning, this CFP considers grades K-5 as elementary, grades 6-8 as middle school, and grades 9-12 as high school. For purposes of this CFP, enrollment in the Sno-Isle Skills Center is not included.

The most significant issues facing the District in terms of providing classroom capacity to accommodate existing and projected demands are:

- Facility shortfalls have been projected in both the near and long-term at the elementary, middle and high school levels.
- On March 14, 2000 the District's $48 million bond measure and maintenance and operation levy renewal were not approved by the voters. Both the bond and levy will be presented to the voters again on May 16, 2000. Without approval of the bond, no new funding sources are available.
- Uneven growth rates exist between geographic sectors within the District. Such uneven growth patterns imply that some schools will reach maximum capacity sooner than others and will increase the difficulty of maintaining stable school boundaries.

These issues are addressed in greater detail in this CFP.

**Figure 1 - District Map**



## II. DISTRICT EDUCATIONAL PROGRAM STANDARDS

School facility and student capacity needs are dictated by the types and amounts of space required to accommodate the District's adopted educational program. The educational program standards which typically drive facility space needs include grade configuration, optimum facility size, class size, educational program offerings, classroom utilization and scheduling requirements, and use of relocatable classrooms (portables).

In addition to student population, other factors such as collective bargaining agreements, government mandates and community expectations also affect classroom space requirements. Traditional educational programs are often supplemented by programs such as special education, bilingual education, preschool and daycare programs, computer labs, and music programs. These programs can have a significant impact on the available student capacity of school facilities.

### District-Wide Educational Program Standards

Special programs offered by the District at specific school sites include, but are not limited to:

- Advanced Placement (high school)
- Special Education Classes
- Summer School
- Gifted and Talented Program
- Transitional Bilingual Classes
- Foreign Language/Student Exchange
- Early Childhood Education
- Drug/Alcohol Counseling
- Transitional Learning Center
- Community Based Transition Program
- Peer and Cross Age Tutoring
- D.A.R.E. (elementary and middle schools)
- TRIBES (cooperative skills)
- Family Support Center
- Learning Support Center
- Friendship Room
- ECEAP
- Music Programs (elementary schools)
- Computer Labs
- SUMMIT (grades 3-5)
- MECI (Mukilteo Educational Clinics, Inc.)
- CyberSchools (Nova Net Labs/Distance Learning)
- Mukilteo Behavioral Support Center
- Communication Classroom
- Peer Helpers

District educational program standards may change in the future as a result of various external or internal changes. External changes may include mandates and needs for special programs, or use of technology. Internal changes may include modifications to the program year, class sizes, and grade span configurations. Changes in physical aspects of the school facilities could also affect educational program standards. The school capacity inventory will be reviewed periodically and adjusted for any changes to the educational program standards. These changes will also be reflected in future updates of this CFP.

The District educational program standards which directly affect school capacity are outlined below for the elementary, middle and high school grade levels.

*Educational Program Standards For Elementary Schools*

- Class size for Kindergarten cannot exceed 29 students.
- Planning class size for Kindergarten is 24 students per teacher.*
- Class size for grades 1-5 cannot exceed 30 students.
- Planning class size for grades 1-5 is 24 students per teacher.*
- Special Education for some students is provided in a self-contained classroom.
- Music instruction will be provided in a separate classroom.
- Schools have a room dedicated as a computer lab.

*Educational Program Standards For Middle and High Schools*

- Class size for middle school grades 6-8 cannot exceed 30 students.
- Planning class size for middle school grades is 25 students per teacher.*
- Class size for high school grades 9-12 cannot exceed 33 students.
- Planning class size for high school grades is 27 students per teacher.*
- It is not possible to achieve 100% utilization of all regular teaching stations throughout the day. Therefore, classroom capacity is adjusted using a utilization factor of 80% to 85% depending on the physical characteristics of the middle and high school facilities.
- Special Education for some students will be provided in a self-contained classroom.
- Identified students will also be provided other programs in classrooms designated as follows:
- Resource Rooms (i.e. computer labs, study rooms).
- Learning Support Centers.
- Program Specific Classrooms (i.e., music, drama, art, home and family education).

*Note: Planning class sizes are used to determine school capacities – 24 students for kindergarten and elementary, 25 students for middle school, and 27 students for high school.*

# III. CAPITAL FACILITIES INVENTORY

Under the GMA, public entities are required to inventory capital facilities used to serve existing development. The purpose of the facilities inventory is to establish a baseline for determining what facilities will be required to accommodate future demand (student enrollment) at acceptable levels of service. This section provides an inventory of capital facilities owned and operated by the District including schools, relocatable classrooms (portables), undeveloped land and support facilities. School facility capacity was inventoried based on the space required to accommodate the District's adopted educational program standards. *See* Section 2. A map showing locations of District facilities is provided as Figure 1.

## Schools

The District maintains eleven elementary schools, four middle schools, two comprehensive high schools, an alternative high school, and the Sno-Isle Skills Center.[1] Elementary schools accommodate grades K-5, middle schools serve grades 6-8, high schools provide for grades 9-12, and the Sno-Isle Skills Center serves grades 10-12.

School capacity was determined based on the number of classrooms within each building and the space requirements of the District's currently adopted educational program[2]. It is this capacity calculation that is used to establish the District's baseline capacity, and to determine future capacity needs based on projected student enrollment. The school capacity inventory is summarized in Tables 1, 2 and 3.

The Sno-Isle Skills Center is not considered for the purposes of measuring capacity or projecting enrollment for the purposes of capital facilities planning within the District. Relocatable classrooms (portables), with the exception of ACES Alternative School, are not viewed by the District as a solution for housing students on a permanent basis. Therefore, these facilities were not included in the school capacity calculations provided in Tables 1, 2 and 3.

## Relocatable Classrooms (Portables)

Relocatable classrooms (portables) are used as interim classroom space to house students until funding can be secured to construct permanent classrooms. The District currently uses 79 relocatable classrooms at various school sites throughout the District to provide additional interim capacity. A typical relocatable classroom can provide capacity for a full-size class of students. Current use of relocatable classrooms throughout the District is summarized in Table 4.

---

[1] The District is the host school district for the Sno-Isle Skills Center which is a vocational skills center that enrolls students from fourteen school districts in Snohomish and Island Counties.

[2] Undersized classrooms and classrooms used for support activities (i.e. music, learning support, physical therapy, etc.) are not included in total capacity numbers shown in Tables 1, 2 and 3. Special Education classrooms are included at a capacity of 12 FTE students at elementary and 17 FTE students at secondary.

## Table 1 - Elementary School Inventory

| Elementary School | Site Size (Acres) | Building Area (Square Feet) | Classrooms | Permanent Capacity | Year Built or Remodeled |
|---|---|---|---|---|---|
| Challenger | 10 | 48,824 | 25 | 528 | 1987 |
| Columbia | 9.6 | 64,031 | 35 | 672 | 1989 |
| Discovery | 9.3 | 41,215 | 22 | 408 | 1988 |
| Endeavour | 9.4 | 53,848 | 18 | 408 | 1994 |
| Fairmount | 15 | 57,756 | 29 | 540 | 1999 |
| Horizon | 19 | 54,975 | 29 | 624 | 1990 |
| Lake Stickney | 9.8 | 34,390 | 20 | 336 | 1992 |
| Mukilteo | 9.8 | 41,015 | 20 | 408 | 1981 |
| Olivia Park | 9.5 | 48,225 | 27 | 552 | 1992 |
| Picnic Point | 10 | 37,529 | 20 | 372 | 1981 |
| Serene Lake | 10 | 44,670 | 20 | 432 | 1994 |
| TOTAL | | 526,478 | | 5,280 | |

## Table 2 - Middle School Inventory

| Middle School | Site Size (Acres) | Building Area (Square Feet) | Classrooms | Permanent Capacity | Year Built or Remodeled |
|---|---|---|---|---|---|
| Explorer | 29.5 | 134,241 | 37 | 830 | 1989 |
| Harbour Pointe | 17.8 | 110,400 | 37 | 767 | 1993 |
| Olympic View | 25.2 | 105,278 | 39 | 843 | 1994 |
| Voyager | 16 | 105,828 | 38 | 787 | 1993 |
| TOTAL | | 455,747 | | 3,227 | |

## Table 3 - High School Inventory

| High School | Site Size (Acres) | Building Area (Square Feet) | Classrooms | Permanent Capacity | Year Built or Remodeled |
|---|---|---|---|---|---|
| ACES Alternative (1) | 5.8 | 29,434 | 10 | 270 | 1997 |
| Kamiak | 60.7 | 250,121 | 70 | 1635 | 1999 |
| Mariner | 37.1 | 195,663 | 50 | 1148 | 1993 |
| TOTAL | | 475,218 | | 3,053 | |

(1) Capacity is limited due to restricted core facilities

## Table 4 - Relocatable Classroom (Portable) Inventory

| School Name | Relocatables | Interim Capacity |
|---|---|---|
| **Elementary School** | | |
| Challenger | 7 | 168 |
| Columbia | 0 | 0 |
| Discovery | 8 | 192 |
| Endeavour | 2 | 48 |
| Fairmount | 4 | 96 |
| Horizon | 2 | 48 |
| Lake Stickney | 7 | 168 |
| Mukilteo | 6 | 144 |
| Olivia Park | 3 | 72 |
| Picnic Point | 4 | 96 |
| Serene Lake | 4 | 96 |
| *Elem. Subtotal* | *47* | *1,128* |
| **Middle School** | | |
| Explorer | 0 | 0 |
| Harbour Pointe | 1 | 25 |
| Olympic View | 3 | 75 |
| Voyager | 0 | 0 |
| *MS Subtotal* | *4* | *100* |
| **High School** | | |
| ACES Alternative | 0 | 0 |
| Kamiak | 10 | 270 |
| Mariner | 18 | 486 |
| *HS Subtotal* | *28* | *756* |
| **TOTAL** | **79** | **1,984** |

Note: Aces Alternative HS has 8 portables that are considered permanent facilities.

* Portable square footage is calculated at 896 square feet per classroom.

## Support Facilities

In addition to schools, the District owns and operates additional facilities which provide operational support functions to the schools. An inventory of these facilities is provided in Table 5 and Table 6.

**Table 5 - Support Facility Inventory**

| Facility | Building Area (Square Feet) | Site Size (Acres) |
|---|---|---|
| Administration | 26,608 | 9.15 |
| Grounds/Maintenance | 22,800 | 4 |
| Service Center | 37,677 | 10 |

**Table 6 - Other Facility Inventory**

| Facility | Building Area (Square Feet) | Site Size (Acres) |
|---|---|---|
| Sno-Isle Skills Center | 72,024 | 15 |

## Land Inventory

The District owns three undeveloped sites:

- a 10.8 acre site on Glenwood Avenue in the City of Everett, restricted for development because of wetlands, access and steep slopes (potential sale of this property is pending);
- a one-acre site in Mukilteo Heights which is restricted for development by covenants and site size; and
- a 10.4 acre site on Gibson Road which the District plans to use for a new elementary school (if approved by the voters).

The District does not own any sites which are developed for uses other than schools and/or which are leased to other parties.

# IV. STUDENT ENROLLMENT PROJECTIONS

## Projected Student Enrollment 2000-2005

Enrollment projections are most accurate for the initial years of the forecast period. Moving further into the future, more assumptions about economic conditions and demographic trends in the area affect the projection. Monitoring birth rates in the County and population growth for the area are essential yearly activities in the ongoing management of the capital facilities plan. In the event that enrollment growth slows, plans for new facilities can be delayed. It is much more difficult, however, to initiate new projects or speed projects up in the event enrollment growth exceeds the projections.

The GMA requires that planning for public facilities be based on the 20-year population projections developed by OFM. This element of the GMA has been interpreted to mean the OFM population forecasts are minimums, which must be accommodated.

The District has developed its own methodology for forecasting future enrollments. The District produced its enrollment projections using a variation of the cohort survival methodology. Cohort survival compares enrollment at a particular grade in a particular year, to the subsequent enrollment at the subsequent grade the following year. For example, the enrollment at first grade in 1998 is compared to the enrollment at second grade in 1999. The ratio of these two numbers (second grade enrollment divided by first grade enrollment) creates a "progression ratio", providing a summary measure of in-and-out migration that has occurred over the course of a year. Once progression ratios have been established over a period of years, they can be weighted to predict the likely enrollment in future years[3].

The District's forecasts also take into account two other factors – market share loss and population housing growth. The market share loss factor reflects the number of students within the District who are enrolled in private schools or within other school districts. The projections used in this report use a loss factor of five-tenths of a percentage point for 2000-2003, decreasing to two-tenths of a percentage point for 2004 and beyond[4]. The population housing growth factor reflects the number of residential housing permits issued within the District's boundaries. In 1998, the District captured nearly 18.1% of new housing permits within the County, an increase from 10.4% in 1997. The forecasts assume that the growth in the new housing market will continue, and use a 1.021 factor for 2000-2005.

For kindergarten projections, birth data from the County for 1988 through 1998 was used. Kindergarten enrollments as a percentage of the births from five years earlier were calculated and averaged. For the past six years, the District has enrolled an average 13% of the county birth cohort, ranging from 14.2% in 1993 to 12.0% in 1999. For the projections, the birth cohort has been gradually increased from 12.5% in 2000 to 12.6% for the remainder of the forecast period . The birth cohort for the 2000 school year is the smallest since 1989, which will result in a smaller

[3] The District projection model uses a five year average of cohort survival rates.

[4] The decrease in market share is due to the assumption that private schools will reach "maturity" and have reached their maximum enrollment levels.

kindergarten class. However, after next year kindergarten enrollment is anticipated to rise due to the larger birth cohorts of the past few years.

Based on the District's enrollment projections, a total of 1,206 FTE students are expected to be added to the District by 2005, an increase of 9% over 1999 enrollment levels.

OFM population-based enrollment projections were estimated for the District using the revised *Draft 2012 Population Forecast by School District* prepared by the Snohomish County Department of Planning and Development Services, and OFM population forecasts for the County.

Based on 1999 population data and actual student enrollment figures for 1999, 2.3% of the total Snohomish County population is made up of FTE students enrolled in the District.

A comparison of the total FTE enrollment projections derived using the forecast methodologies discussed above is provided in Table 7.

**Table 7 - Projected Student Enrollment (2000 - 2005)**

| FTE Projection | 1999* (Actual) | 2000 | 2001 | 2002 | 2003 | 2004 | 2005 | Total Change | % Change |
|---|---|---|---|---|---|---|---|---|---|
| OFM/County | 12,818 | 13,964 | 14,380 | 14,797 | 15,214 | 14,523 | 14,865 | 2,047 | 16% |
| OSPI | 12,818 | 12,971 | 13,135 | 13,141 | 13,095 | 13,129 | 13,158 | 340 | 3% |
| District | 12,818 | 12,835 | 12,977 | 13,260 | 13,461 | 13,740 | 14,024 | 1,206 | 9% |

* Actual student enrollment as of October 1999

OSPI projections have been modified by taking out estimated Skills Center enrollment based on past 6 years

It can be noted that the District projections do not exceed the OFM forecasts as required by GMA. The District contends that the OFM projections are based on historical information that no longer holds true for the Mukilteo area. The District's own projections take into account recent demographic trends and should be a more accurate reflection of future growth within the District's boundaries. Further information about the District's enrollment projections can be found in Appendix B.

## 2012 Enrollment Projections

Student enrollment projections beyond 2005 are highly speculative. The District projects a 2012 student FTE population of 16,736 - equating to a county birth cohort of 12.8% in the year 2012, compared with the current 1999 ratio of 12.5%. This is based on the demographer's assumption that growth in student population will gradually increase in later years of the forecast period. The total enrollment estimate was then broken down by grade span to evaluate long-term site acquisition needs for elementary, middle and high school facilities. Enrollment by grade span was determined based on recent and projected enrollment trends at the elementary, middle and high school levels.

Projected enrollment by grade span for the year 2012 is provided in Table 8. Again, these estimates are highly speculative and are used only for general planning purposes. Analysis of future facility and capacity needs is provided in Section 6 of this CFP.

**Table 8 - Projected Student Enrollment (2012)**

| Grade Span | Projected Enrollment |
|---|---|
| Elementary (K-5) | 7,401 |
| Middle School (6-8) | 4,142 |
| High School (9-12) | 5,193 |
| **TOTAL (K-12)** | 16,736 |

Note: These figures are derived from District projections

# V. CAPITAL FACILITIES NEEDS

Projected available student capacity was derived by subtracting projected FTE student enrollment from existing school capacity (excluding relocatable classrooms) for each of the six years in the forecast period (2000-2005). Capacity needs are expressed in terms of "unhoused students." The method used to define future capacity needs assumes no new construction. For this reason *planned construction projects are not included at this point.* This factor is added later. By the end of the six-year forecast period (2005), additional classroom capacity will be needed as follows:

**Table 9 - Unhoused Students in 2005**

| Grade Span | Unhoused Students |
|---|---|
| Elementary (K-5) | 751 |
| Middle School (6-8) | 146 |
| High School (9-12) | 1,567 |
| **Total (K-12)** | **2,464** |

These figures do not include any planned improvements by the District through 2005. These figures are equivalent to approximately 1.16 elementary schools, 0.20 middle schools and one high school.

Projected future capacity needs are depicted in Table 10. They are derived by applying the projected number of students to the projected capacity. Planned improvements by the District through 2005 are included. It is not the District's policy to include relocatable classrooms when determining future capital facility needs; therefore interim capacity provided by relocatable classrooms is not included. (Information on relocatable classrooms and interim capacity can be found in Table 4. Information on planned construction projects can be found in Section 7.)

## Table 10 - Projected Student Capacity (2000 - 2005)

ELEMENTARY SURPLUS/DEFICIENCY

| | 1999* | 2000 | 2001 | 2002 | 2003 | 2004 | 2005 | 2012 |
|---|---|---|---|---|---|---|---|---|
| Existing Capacity | 5,280 | 5,280 | 5,280 | 5,280 | 5,930 | 5,930 | 5,930 | 5,930 |
| Added Capacity | | | | 650 | | | | |
| Total Capacity | 5,280 | 5,280 | 5,280 | 5,930 | 5,930 | 5,930 | 5,930 | 5,930 |
| Enrollment | 5,935 | 5,843 | 5,774 | 5,733 | 5,779 | 5,858 | 6,031 | 7,401 |
| Surplus (Deficiency) | -655 | -563 | -494 | 197 | 151 | 72 | -101 | -1,471 |

MIDDLE SCHOOL SURPLUS/DEFICIENCY

| | 1999* | 2000 | 2001 | 2002 | 2003 | 2004 | 2005 | 2012 |
|---|---|---|---|---|---|---|---|---|
| Existing Capacity | 3,227 | 3,227 | 3,227 | 3,227 | 3,227 | 3,227 | 3,227 | 3,227 |
| Added Capacity | | | | | | | | |
| Total Capacity | 3,227 | 3,227 | 3,227 | 3,227 | 3,227 | 3,227 | 3,227 | 3,227 |
| Enrollment | 3,037 | 3,128 | 3,327 | 3,456 | 3,514 | 3,487 | 3,373 | 4,142 |
| Surplus (Deficiency) | 190 | 99 | -100 | -229 | -287 | -260 | -146 | -915 |

HIGH SCHOOL SURPLUS/DEFICIENCY

| | 1999* | 2000 | 2001 | 2002 | 2003 | 2004 | 2005 | 2012 |
|---|---|---|---|---|---|---|---|---|
| Existing Capacity | 3,053 | 3,053 | 3,053 | 3,053 | 3,696 | 3,696 | 3,696 | 3,696 |
| Added Capacity | | | | 643 | | | | |
| Total Capacity | 3,053 | 3,053 | 3,053 | 3,696 | 3,696 | 3,696 | 3,696 | 3,696 |
| Enrollment | 3,846 | 3,864 | 3,876 | 4,071 | 4,168 | 4,395 | 4,620 | 5,193 |
| Surplus (Deficiency) | -793 | -811 | -823 | -375 | -472 | -699 | -924 | -1,497 |

* Actual FTE Enrollment for 99/00 School Year - as of October 1999

# VI. CAPITAL FACILITIES FINANCING PLAN

## Planned Improvements

At the time of preparation of this Plan, the District is awaiting approval of a $48 million bond that will be placed before the voters on May 16, 2000. If approved, the bond will fund the following capacity-related projects[5]:

- Mariner High School Addition ($17.6 million) consisting of a 28 to 30 classroom addition which should add capacity for over 600 students; and
- A new elementary school ($13.1 million) at the Gibson Road site with capacity for approximately 650 students.

In the event that planned construction projects do not fully address space needs for student growth and a reduction in interim student housing, the Board could consider various courses of action, including, but not limited to:

- alternative scheduling options;
- changes in the instructional model;
- grade configuration change;
- purchasing portable classrooms;
- increased class sizes; or
- modified school calendar.

Funding for planned improvements is typically secured from a number of sources including voter approved bonds, State match funds and impact fees. Each of these funding sources is discussed in greater detail below.

## Financing for Planned Improvements

*General Obligation Bonds*

Bonds are typically used to fund construction of new schools and other capital improvement projects. A 60% voter approval is required to approve the issuance of bonds. Bonds are then retired through collection of property taxes. The District currently has a $48 million bond package that will be going to voters on May 16, 2000. If approved, the bonds will provide funding for the construction of new facilities and will be used to update classroom technology, renovate athletic fields, improve existing facilities, and enhance district-wide security and safety. If the general obligation bonds are not approved by the voters on May 16, 2000, the District will develop a contingency plan to meet the most critical needs, within the scope of expenditure restrictions.

[5] This list includes only those projects that would increase student capacity. Non-capacity projects, such as security and athletic field improvements are not included here but can be found in Table 11.

*Capital Projects Levy*
The District is in year 4 of a six-year capital projects levy, with a combined total levy of $3,000,000. All funds collected to date have been utilized. The remaining $1.1 million will be dedicated to additional modernization and remodeling of buildings and grounds.

*State Match Funds*
State Match Funds come from the Common School Construction Fund. Bonds are sold on behalf of the fund, and then retired from revenues accruing predominantly from the sale of renewable resources (i.e., timber) from State school lands set aside by the Enabling Act of 1889. If these sources are insufficient to meet needs, the Legislature can appropriate funds or the State Board of Education can establish a moratorium on certain projects. School districts may qualify for State match funds for specific capital projects based on a prioritization system. The District is currently eligible for State Match funds for capital projects at the high school level.

*Land Sales*
The District's 10.8 acre Glenwood Avenue property is pending sale for $950,000. The 90-day feasibility period expires on May 28, 2000 at which time the buyer has the right to terminate the agreement.

*Impact Fees*
Impact fees are a means of supplementing traditional funding sources for construction of public facilities needed to accommodate new development. School impact fees are generally collected by the permitting agency at the time plats are approved or building permits are issued. A detailed discussion on impact fees is provided in Section 7.

The Six-Year Financing Plan shown on Table 11 demonstrates how the District intends to fund new construction and improvements to school facilities for the years 2000-2005. The financing components include a capital projects levy, funds from bond, impact fees and State Match funds.

The Financing Plan separates projects and portions of projects which add capacity from those which do not, since the latter are generally not appropriate for impact fee funding. Projects and portions of projects which remedy existing deficiencies are also not appropriate for impact fee funding. Thus, impact fees will not be used to finance projects or portions of projects which do not add capacity or which remedy existing deficiencies.

# Table 11 - Six Year Financing Plan

**Improvements Adding Permanent Capacity (Costs in Millions)**

| Project | 2000 | 2001 | 2002 | 2003 | 2004 | 2005 | Total Cost | *Funds will be spent from these sources:* Bonds/ Levy | State Match | Land Sales | Impact Fees | Future Sources |
|---|---|---|---|---|---|---|---|---|---|---|---|---|
| Elementary No. 12 | $ - | $ - | $ 13.10 | $ - | $ - | $ - | $ 13.10 | x | | | x | x |
| Mariner Addition | $ - | $ - | $ 17.60 | $ - | $ - | $ - | $ 17.60 | x | x | | x | x |
| Total | $ - | $ - | $ 30.70 | $ - | $ - | $ - | $ 30.70 | | | | | |

**Improvements Not Adding Capacity (Costs in Millions)**

| Project | 2000 | 2001 | 2002 | 2003 | 2004 | 2005 | Total Cost | *Funds will be spent from these sources:* Bonds/ Levy | State Match | Land Sales | Impact Fees | Future Sources |
|---|---|---|---|---|---|---|---|---|---|---|---|---|
| Technology Upgrades | $ 2.19 | $ 2.19 | $ 2.19 | $ - | $ - | $ - | $ 6.57 | x | x | x | | x |
| Modernize & relocate publication svcs | $ 0.40 | $ - | $ - | $ - | $ - | $ - | $ 0.40 | x | x | x | | x |
| Restroom/site improvements at stadium | $ 0.31 | $ - | $ - | $ - | $ - | $ - | $ 0.31 | x | x | x | | x |
| Audio upgrades at misc. schools (ADA) | $ 0.14 | $ - | $ - | $ - | $ - | $ - | $ 0.14 | x | x | x | | x |
| District-wide safety & security | $ 1.52 | $ - | $ - | $ - | $ - | $ - | $ 1.52 | x | x | x | | x |
| Underground storage tank removal | $ 0.10 | $ - | $ - | $ - | $ - | $ - | $ 0.10 | x | x | x | | x |
| Relocate and replace existing portables | $ 0.35 | $ - | $ - | $ - | $ - | $ - | $ 0.35 | x | x | x | | x |
| Rebuild 5 elementary playgrounds | $ 1.05 | $ - | $ - | $ - | $ - | $ - | $ 1.05 | x | x | x | | x |
| HVAC upgrades at SL | $ 0.70 | $ - | $ - | $ - | $ - | $ - | $ 0.70 | x | x | x | | x |
| Boiler replacement at FA | $ 0.45 | $ - | $ - | $ - | $ - | $ - | $ 0.45 | x | x | x | | x |
| Playground safety standards | $ 0.11 | $ - | $ - | $ - | $ - | $ - | $ 0.11 | x | x | x | | x |
| Rebuild football field @ KA | $ 1.52 | $ - | $ - | $ - | $ - | $ - | $ 1.52 | x | x | x | | x |
| Resurface Kamiak track | $ 0.18 | $ - | $ - | $ - | $ - | $ - | $ 0.18 | x | x | x | | x |
| Improve HS baseball/softball fields | $ 0.37 | $ - | $ - | $ - | $ - | $ - | $ 0.37 | x | x | x | | x |
| MA Band room remodel | $ 0.70 | $ - | $ - | $ - | $ - | $ - | $ 0.70 | x | x | x | | x |
| KA Band room remodel | $ 0.70 | $ - | $ - | $ - | $ - | $ - | $ 0.70 | x | x | x | | x |
| Repair MS tracks and softball fields | $ 0.17 | $ - | $ - | $ - | $ - | $ - | $ 0.17 | x | x | x | | x |
| Modernize facilities @ EX | $ 2.53 | $ - | $ - | $ - | $ - | $ - | $ 2.53 | x | x | x | | x |
| Field improvements @ VO & ACES | $ 0.15 | $ - | $ - | $ - | $ - | $ - | $ 0.15 | x | x | x | | x |
| Football/soccer fields @ MA & EX | $ 0.30 | $ - | $ - | $ - | $ - | $ - | $ 0.30 | x | x | x | | x |
| Total | $ 13.94 | $ 2.19 | $ 2.19 | $ - | $ - | $ - | $ 18.32 | | | | | |

*Note: If planned construction projects do not fully address space needs for increased student population, the District may elect to purchase portable classrooms to accommodate those students.*

# VII. SCHOOL IMPACT FEES

The GMA authorizes jurisdictions to collect impact fees to supplement funding of additional public facilities needed to accommodate new development. Impact fees cannot be used for the operation, maintenance, repair, alteration, or replacement of existing capital facilities used to meet existing service demands, or for the construction of new capital facilities used to remedy existing deficiencies.

## School Impact Fees

The Snohomish County General Policy Plan sets certain conditions for school districts wishing to assess impact fees:

- The District must provide support data including an explanation of the calculation methodology, a description of key variables and their computation, and definitions and sources of data for all inputs into the fee calculation.
- Such data must be accurate, reliable and statistically valid.
- Data must accurately reflect projected costs in the Six-Year Financing Plan.
- Data in the proposed impact fee schedule must reflect expected student generation rates from the following residential unit types:
    1) single family;
    2) multi-family/studio or 1-bedroom; and
    3) multi-family/2-bedroom or more.

The Snohomish County impact fee program requires school districts to prepare and adopt Capital Facilities Plans meeting the specifications of the GMA. Impact fees are calculated in accordance with the formula, which are based on projected school facility costs necessitated by new growth and are contained in the District's CFP.

## Methodology and Variables Used to Calculate School Impact Fees

Impact fees have been calculated utilizing the formula in the Snohomish County Impact Fee Ordinance. The resulting figures are based on the District's cost per dwelling unit to purchase land for school sites, make site improvements, construct schools and purchase/install relocatable facilities (portables) that add capacity needed to serve new development. As required under the GMA, credits have also been applied in the formula to account for State Match Funds to be reimbursed to the District and projected future property taxes to be paid by the dwelling unit.

*Site Acquisition Cost Element*

1. Site Size - acreage needed to accommodate each planned improvement.
2. Average Land Cost Per Acre - based on estimates of land costs within the District.

3. Facility Design Capacity - number of students each planned improvement is designed to accommodate.
4. Student Factor - average number of students generated by each housing type -- in this case, single family dwellings and multi-family dwellings. Multi-family dwellings were broken out into one-bedroom and two-plus bedroom units. The District conducted student generation studies within the District. This was done to "localize" generation rates for purposes of calculating impact fees. Student generation rates for the District are shown on Table 12.

**Table 12 - Student Generation Rates**

| Unit Type | Elementary | Middle School | High School | TOTAL |
|---|---|---|---|---|
| Single Family | 0.332 | 0.156 | 0.194 | 0.682 |
| Multi-Family (1 Bedroom) | 0.020 | 0.000 | 0.010 | 0.030 |
| Multi-Family (2+ Bedrooms) | 0.265 | 0.074 | 0.080 | 0.419 |

*School Construction Cost Variables*

1. Current Facility Square Footage - used in combination with the "Existing Relocatable Square Footage" to apportion the impact fee amounts between permanent and interim capacity figures.
2. Estimated Facility Construction Cost - based on planned costs or on actual costs of recently constructed schools. The facility cost is the total cost for construction projects as defined in Table 11. Facility construction costs also include the off-site development costs. Costs vary with each site and may include such items as sewer line extensions, water lines, off-site road and frontage improvements. Off-site development costs are not covered by State Match Funds. Off-site development costs vary, and can represent 10% or more of the total building construction cost.

*Relocatable Facilities Cost Element*

Impact fees may be collected to allow acquisition of relocatable classrooms to help relieve capacity deficiencies on an interim basis. The cost allocated to new development must be growth related and must be in proportion to the current permanent versus interim space allocations by the District.

1. Cost Per Unit - the average cost to purchase and install a relocatable classroom.
2. Relocatable Facilities Cost - the total number of needed units multiplied by the cost per unit.

*State Match Credit Variables*

1. BOECKH Index - currently $101.27 (March 2000).
2. State Match Percentage - percentage of State match funds that the District expects to receive. For new construction and additions, the District is currently eligible to receive a maximum state match of 41.50% of *eligible* costs (as defined by the State).

*Tax Credit Variables*

A credit is granted to new development to account for future payments which will be paid or are reasonably anticipated to be paid to the District. The credit is calculated using a "present value" formula.

1. Interest Rate (20-Year General Obligation Bond) - interest rate of return on a 20-year General Obligation Bond and is derived from the Bond Buyer index. As of March 23, 2000 the current interest rate is 5.76%.
2. Levy Rate - current bond levy rate is $2.20 per $1,000 in assessed value.
3. Average Assessed Value - based on estimates made by the County's Planning and Development Services Department utilizing information from the Assessor's files. The current average assessed value is $187,959 for single family dwelling units; $45,933 for one-bedroom multi-family dwelling units; and $65,892 for two or more bedroom multi-family dwelling units.

## Proposed Mukilteo School District Impact Fee Schedule

Using the variables and formula described, impact fees proposed for the District are summarized in Table 13. See also Appendix D.

Table 13 - School Impact Fees

| Housing Type | | Impact Fee Per Unit |
|---|---|---|
| Single Family | $ | 3,718 |
| Multi-Family (1 Bedroom) | $ | - |
| Multi-Family (2+ Bedroom) | $ | 2,864 |

# APPENDIX A

## DEFINITIONS

## APPENDIX A

## DEFINITIONS

The terms used in this CFP are defined in the Snohomish County School Impact Fee Ordinance or, if not defined therein, as follows:

Board of Directors: Mukilteo School District Board of Directors.

District: Mukilteo School District No. 6.

FTE or Full Time Equivalent: a means of measuring student enrollment based on the number of hours per day in attendance at District schools. A student is considered an FTE if he/she is enrolled for the equivalent of a full schedule each school day. Kindergarten students attend half-day programs and therefore are counted as 0.5 FTE. For purposes of this CFP, all other grades are considered to contain one FTE per student.

OFM: Washington State Office of Financial Management.

Teaching Station: a facility space (classroom) specifically dedicated to implementing the District's educational program and capable of accommodating at any one time a full class. Planning class size is 24 students for K-5, 25 students for grades 6-8, and 27 for grades 9-12 .

Unhoused Students: students projected to be housed in facilities other than permanent classrooms.

# APPENDIX B

## POPULATION AND ENROLLMENT DATA

## APPENDIX B

The District contracted with a consultant, Les Kendrick, to develop enrollment projections for the District's planning needs. Kendrick's report, "Mukilteo Enrollment Trends and Projections" was completed in November 1999.

The following points are taken directly from the report:

- Enrollment is in a slowing period due to smaller birth cohorts and slightly slower growth in the elementary school-age population. (p. 2)
- For the next 1-2 years, Mukilteo may experience very little growth in enrollment or even declines, with enrollment beginning to increase more rapidly in the 2002 school year. (p. 2)
- Figures from OFM indicate that the 5-19 age group (the one most closely approximating school-age) will grow by an average of 6 tenths of a percentage point annually between now and 2005. This is lower than previous years. (p. 56)
- Mukilteo's share of the county's permits increased from 10.4% in 1997 to 18.1% in 1998. This jump could help this District recapture some of the "new resident" market share that may have been lost to other districts in the last few years. (p. 58)

## APPENDIX B

### PROJECTED STUDENT ENROLLMENT 2000-2005
(District Estimate)

| School Type | Grade Level | School Year 1999 (1) | 2000 | 2001 | 2002 | 2003 | 2004 | 2005 |
|---|---|---|---|---|---|---|---|---|
| Elementary | K | 938 | 941 | 989 | 1013 | 1046 | 1074 | 1083 |
| | 1 | 1077 | 991 | 1006 | 1057 | 1085 | 1121 | 1151 |
| | 2 | 1075 | 1059 | 986 | 1001 | 1055 | 1083 | 1119 |
| | 3 | 1128 | 1075 | 1071 | 997 | 1016 | 1071 | 1099 |
| | 4 | 1119 | 1113 | 1074 | 1070 | 999 | 1018 | 1073 |
| | 5 | 1067 | 1134 | 1142 | 1101 | 1101 | 1028 | 1047 |
| Middle | 6 | 1057 | 1080 | 1161 | 1170 | 1131 | 1131 | 1056 |
| | 7 | 998 | 1069 | 1105 | 1189 | 1200 | 1161 | 1161 |
| | 8 | 982 | 979 | 1061 | 1097 | 1183 | 1195 | 1156 |
| Sr. High | 9 | 1082 | 1021 | 1030 | 1116 | 1157 | 1249 | 1261 |
| | 10 | 905 | 1045 | 998 | 1006 | 1094 | 1135 | 1224 |
| | 11 | 946 | 845 | 987 | 942 | 953 | 1036 | 1075 |
| | 12 | 913 | 953 | 861 | 1007 | 964 | 975 | 1060 |
| Elementary Headcount | | 6404 | 6313 | 6268 | 6239 | 6302 | 6395 | 6572 |
| Elementary FTE (2) | | 5935 | 5843 | 5774 | 5733 | 5779 | 5858 | 6031 |
| Middle Headcount | | 3037 | 3128 | 3327 | 3456 | 3514 | 3487 | 3373 |
| Sr. High Headcount | | 3846 | 3864 | 3876 | 4071 | 4168 | 4395 | 4620 |
| K-12 Headcount | | 13287 | 13305 | 13471 | 13766 | 13984 | 14277 | 14565 |
| K-12 FTE (2) | | 12818 | 12835 | 12977 | 13260 | 13461 | 13740 | 14024 |

Source: Mukilteo School District / prepared by Consultant, Les Kendrick Nov 1999

Notes:

(1) Actual student enrollment as of October 1999

(2) Assumes half-day attendance for kindergarten students

# APPENDIX C

## STUDENT GENERATION FACTOR REVIEW

**Michael J. McCormick, FAICP**
**2420 Columbia SW**
**Olympia, Washington 98501**

**Office: (360) 754-2916 FAX (360) 754-3448**

March 28, 2000

Memorandum

To: Heidi Berger-Hansen

From: Mike McCormick

Re: Student Generation Rates (SGR) for the Mukilteo School District

This memorandum contains the 1999-2000 Student Generation Rates (SGR) for both single family and multiple family residential development as required by Snohomish County.

The methodology used to produce these rates is consistent with the methodology developed for the Marysville School District in 1998.[1] The rates have been calculated for single family, one bedroom multiple family and two or more bedrooms multiple family residential development. The survey area included all of the territory within the boundaries of the Mukilteo School District. The analysis is based on projects constructed between 1992 through 1999. The primary sources of information are Snohomish County and the Mukilteo School District.

The process of analysis involved gathering the residential development data from 1992 through 1999 from the county. The addresses of each of these developments were matched with student addresses from this school year. This data was aggregated to show the number of students in each of the grade groupings for each type of residential development.

The primary source of the development activity information was the MetroScan data provided by the county[2]. The district supplemented this data by adding information on the apartment number and number of bedrooms in each unit of multiple family housing in the study.[3] A comparison of

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[1] The 2000 analysis has been helped by improvements in the MetroScan data: First, the data is up-to-date with 1999 developments included. Second, the data is comprehensive by including permit information from incorporated and unincorporated jurisdictions within the district. The grouping's of single family and multiple family is consistent with Title 26C. Single family are limited to single family detached units including mobile homes. Multiple family includes single family attached, duplexes and condominiums.

[2] The data provided by the county contained a variety of information including parcel number, land use code (including number of units), street address and year built. For the purpose of calculating the SGR's, street number and name were extracted for comparison with student addresses.

[3] The general assumption is that all units which are in the 1999 data are currently available for occupancy. This has the potential to slightly overstate the number of available units and, thereby, understate the SGR's. Where the district's information indicated that a multiple family unit was not fully completed and open for occupancy, that

the street addresses of the new developments with the addresses of each of the district's students from the 1999-2000 year produced a record of each unit occupied by a student. This information was aggregated into the three grade groupings and produced student generation rates for single family and for both one bedroom and two or more bedrooms multiple family.

| | Single Family[4] | Multiple Family[5] | | |
|---|---|---|---|---|
| | | All | 1-bedroom | 2 or More |
| K through 5 | 0.332 | 0.170 | 0.020 | 0.265 |
| 6 through 8 | 0.156 | 0.045 | 0.000 | 0.074 |
| 9 through 12 | 0.194 | 0.053 | 0.010 | 0.080 |
| Total[6] | 0.682 | 0.269 | 0.029 | 0.420 |

The SGR were calculated on a 100% sample of all single and multi-family constructed between 1992 and 1999.[7] The data contains all development activity. The residential development activity was extracted from the data provided by the county.

CC: Grace Yuan, Preston, Gates and Ellis
Attachments: Tables--
Mukilteo School District—Single Family Student Generation Rates
Mukilteo School District—Multiple Family Student Generation Rates

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development was excluded from the analysis. The units in senior developments were similarly excluded from the count. A total of 251 units were excluded.

[4] A total of 2430 single family residential units were counted between 1992 and 1999 within the school district boundary. These include 105 manufactured homes. There are a total of 1658 students from these units.

[5] A total of 2019 multi-family units (two or more units per structure) were counted between 1992 and 1999. These include 142 duplexes, 1437 condominiums and 8 attached single family units. There are 252 apartments with 2 or more bedrooms and 180 apartments with one bedroom. These apartments are occupied by 579 students. Apartment projects exclusively devoted to senior residents or which otherwise exclude students are not included in the apartment count. All condominiums and duplexes were assumed to contain two or more bedrooms. Field checks conducted by the district confirmed the basis for this assumption.

[6] Totals may not balance due to rounding.

[7] Substantial problems were encountered in determining the numbers of bedrooms in the 17 larger multiple family developments. Detailed bedroom data was developed for 264 units—162 one bedroom and 102 2 or more bedrooms. The one bedroom and two or more bedroom SGR's are calculated on this subset of data. A comparison between the total sample of multiple family and the subset follows:

| | Overall Multiple Family SGR | Inventoried Subsample SGR |
|---|---|---|
| K through 5 | 0.135 | 0.170 |
| 6 through 8 | 0.074 | 0.045 |
| 9 through 12 | 0.077 | 0.053 |
| Total | 0.287 | 0.269 |

Overall the rates do not differ much. There is some minor variation at the individual groups level.

March 28, 2000

Mukilteo School District
1999-2000
Preliminary
Single Family SGR's--Adjusted for Condo's and Duplexes

| Type of Unit | Number |
|---|---|
| SF detached | 1 |
| SF detached-1d.u. | 2324 |
| Manufactured housing | 105 |
| | |
| Total | 2430 |

| Grades | # | SGR |
|---|---|---|
| K through 5 | 807 | 0.332 |
| 6 through 8 | 380 | 0.156 |
| 9 through 12 | 471 | 0.194 |
| Total | 1658 | 0.682 |

| Grade | # |
|---|---|
| K | 118 |
| 1 | 141 |
| 2 | 128 |
| 3 | 126 |
| 4 | 159 |
| 5 | 135 |
| 6 | 119 |
| 7 | 141 |
| 8 | 120 |
| 9 | 132 |
| 10 | 113 |
| 11 | 119 |
| 12 | 107 |
| Total | 1658 |

March 28, 2000

Mukilteo School District
1999-2000
Multiple Family Student Generation Rates

| Apartments | | Condo's and Duplexes(1) | with C+D | Apartments in Harbour Point (Phase II) |
|---|---|---|---|---|
| Total | 554 | 1587 | 2141 | 264 |
| 1 bedroom | 122 | | 122 | 102 |
| 2 or more bedrooms | 432 | 1587 | 2019 | 162 |

| | | | 1 bdrm | | 2+ bdrm | | Totals |
|---|---|---|---|---|---|---|---|
| Grade Levels | #'s | SGR's | #'s | SGR | #'s | SGR | #'s | |
| K through 5 | 273 | 0.135 | 2 | 0.020 | 43 | 0.265 | 45 | 0.170 |
| 6 through 8 | 150 | 0.074 | 0 | 0.000 | 12 | 0.074 | 12 | 0.045 |
| 9 through 12 | 156 | 0.077 | 1 | 0.010 | 13 | 0.080 | 14 | 0.053 |
| Total | 579 | 0.287 | 3 | 0.029 | 68 | 0.420 | 71 | 0.269 |

(1) All Condominiums and Duplexes are assumed to be two bedroom units. Nine of the larger developments visited to verify that they exclusively contained two bedroom units.

# APPENDIX D

## SCHOOL IMPACT FEE CALCULATIONS

## MUKILTEO SCHOOL DISTRICT NO. 6
JURISDICTION: SNOHOMISH COUNTY, CITY OF MUKILTEO, CITY OF EVERETT
IMPACT FEE CALCULATION PREPARED MARCH 2000

### School Site Acquisition Cost:

((AcresxCost per Acre)/Facility Capacity)xStudent Generation Factor

| | Facility Acreage | Cost/ Acre | Facility Capacity | Student Factor SFR | Student Factor MFR (1) | Student Factor MFR (2+) | Cost/ SFR | Cost/ MFR (1) | Cost/ MFR (2+) |
|---|---|---|---|---|---|---|---|---|---|
| Elementary | 11.5 | $ - | 650 | 0.332 | 0.020 | 0.265 | $ - | $ - | $ - |
| Middle | 17.5 | $ - | 750 | 0.156 | 0.000 | 0.074 | $ - | $ - | $ - |
| High | 25 | $ - | 1500 | 0.194 | 0.010 | 0.080 | $ - | $ - | $ - |
| | | | | | | TOTAL | $ - | $ - | $ - |

### School Construction Cost:

((Facility Cost/Facility Capacity)xStudent Generation Factor)x(permanent/Total Sq Ft)

| | %Perm | Facility Cost | Facility Capacity | Student Factor SFR | Student Factor MFR (1) | Student Factor MFR (2+) | Cost/ SFR | Cost/ MFR (1) | Cost/ MFR (2+) |
|---|---|---|---|---|---|---|---|---|---|
| Elementary | 95.10% | $ 13,100,000 | 650 | 0.332 | 0.020 | 0.265 | $ 6,363 | $ 383 | $ 5,079 |
| Middle | 95.10% | $ - | | 0.156 | 0.000 | 0.074 | $ - | $ - | $ - |
| High | 95.10% | $ 17,600,000 | 643 | 0.194 | 0.010 | 0.080 | $ 5,050 | $ 260 | $ 2,082 |
| | | | | | | TOTAL | $ 11,413 | $ 643 | $ 7,161 |

### Temporary Facility Cost:

((Facility Cost/Facility Capacity)xStudent Generation Factor)x(Temporary/Total Square Feet)

| | %Temp | Facility Cost | Facility Capacity | Factor SFR | Student Factor MFR (1) | Student Factor MFR (2+) | Cost/ SFR | Cost/ MFR (1) | Cost/ MFR (2+) |
|---|---|---|---|---|---|---|---|---|---|
| Elementary | 4.90% | $ 60,000.00 | 24 | 0.332 | 0.020 | 0.265 | $ 41 | $ 2 | $ 32 |
| Middle | 4.90% | $ 60,000.00 | 25 | 0.156 | 0.000 | 0.074 | $ 18 | $ - | $ 9 |
| High | 4.90% | $ 60,000.00 | 27 | 0.194 | 0.010 | 0.080 | $ 21 | $ 1 | $ 9 |
| | | | | | | TOTAL | $ 80 | $ 3 | $ 50 |

### State Matching Credit:

Boeckh Index X SPI Square Footage X District Match % X Student Factor

*(Within the next 5 year projection, the District is only eligible to receive funds at the high school level)*

| | Boeckh Index | SPI Footage | District Match % | Student Factor SFR | Student Factor MFR (1) | Student Factor MFR (2+) | Cost/ SFR | Cost/ MFR (1) | Cost/ MFR (2+) |
|---|---|---|---|---|---|---|---|---|---|
| Elementary | $ 101.27 | 80 | 0.00% | 0.332 | 0.020 | 0.265 | $ - | $ - | $ - |
| Junior | $ 101.27 | 110 | 0.00% | 0.156 | 0.000 | 0.074 | $ - | $ - | $ - |
| Sr. High | $ 101.27 | 120 | 41.50% | 0.194 | 0.010 | 0.080 | $ 978 | $ 50 | $ 403 |
| | | | | | | TOTAL | $ 978 | $ 50 | $ 403 |

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**Tax Payment Credit:**

| | SFR | MFR (1) | MFR (2+) |
|---|---|---|---|
| Average AssessedValue | $ 187,959 | $ 45,933 | $ 65,892 |
| Capital Bond Interest Rate | 5.76% | 5.76% | 5.76% |
| Years Amortized | 10 | 10 | 10 |
| Property Tax Levy Rate | 0.22% | 0.22% | 0.22% |
| Tax Payment Credit | $3,078 | $752 | $1,079 |

**Fee Summary:**

| | | SF | MF1 | MF2+ |
|---|---|---|---|---|
| Site Acquisition Costs | | $ - | $ - | $ - |
| Permanent Facility Cost | | $ 11,413 | $ 643 | $ 7,161 |
| Temporary Facility Cost | | $ 80 | $ 3 | $ 50 |
| State Match Credit | | $ (978) | $ (50) | $ (403) |
| Tax Payment Credit | | $ (3,078) | $ (752) | $ (1,079) |
| FEE (AS CALCULATED) | | $ 7,437 | $ - | $ 5,729 |
| FEE DISCOUNT | 50% | $ 3,719 | $ - | $ 2,865 |
| **FINAL FEE** | | **$ 3,718** | **$ -** | **$ 2,864** |