

1 APPROVED: 11/24/14  
2 EFFECTIVE: 1/1/15

3  
4 SNOHOMISH COUNTY COUNCIL  
5 Snohomish County, Washington

6  
7 ORDINANCE NO. 14-096

8  
9 ADOPTING THE 2014-2019 CAPITAL FACILITIES PLANS FOR THE  
10 EDMONDS, EVERETT, LAKE STEVENS, LAKEWOOD, MARYSVILLE, MONROE,  
11 MUKILTEO, NORTHSHORE, SNOHOMISH AND SULTAN SCHOOL DISTRICTS  
12 PURSUANT TO SCC 30.66C.020 AND AMENDING  
13 THE SCHOOL IMPACT FEE SCHEDULE IN SCC 30.66C.100  
14

15 WHEREAS, Snohomish County (“the County”) has adopted an impact fee  
16 ordinance to provide mitigation for the impacts of new development on public school  
17 facilities pursuant to RCW 82.02.050; and  
18

19 WHEREAS, pursuant to RCW 82.02.050(4), impact fees may be collected and  
20 spent only for the public facilities defined in RCW 82.02.090, which are addressed by  
21 the capital facilities element of the Snohomish County Comprehensive Plan (“GMACP”)  
22 created under the Growth Management Act (GMA), Chapter 36.70A RCW; and  
23

24 WHEREAS, pursuant to Snohomish County Code (SCC) 30.66C.040, school  
25 districts must submit capital facilities plans to the County for inclusion in the County’s  
26 capital facilities plan, part of the capital facilities element of the GMACP, to be eligible to  
27 receive payment of school impact fees; and  
28

29 WHEREAS, school capital facilities plans for Edmonds School District No. 15,  
30 Everett School District No. 2, Lake Stevens School District No. 4, Lakewood School  
31 District No. 306, Marysville School District No. 25, Monroe School District No. 103,  
32 Mukilteo School District No. 6, Northshore School District No. 417, Snohomish School  
33 District No. 201 and Sultan School District No. 311 (collectively “the Districts”), were last  
34 adopted by Snohomish County in 2012 and will expire on December 31, 2014; and  
35

36 WHEREAS, school districts must submit updated capital facilities plans to the  
37 County for review and adoption before December 31, 2014, in order to maintain their  
38 eligibility to receive school impact fees after December 31, 2014; and  
39

40 WHEREAS, the Districts each submitted an updated capital facilities plan for  
41 2014-2019 to the Snohomish County Department of Planning and Development  
42 Services (PDS) pursuant to SCC 30.66C.035; and  
43

44 WHEREAS, the Arlington School District No. 16, the Index School District No. 63,  
45 Darrington School District No. 330, Granite Falls School District No. 332 and  
46 Stanwood/Camano Island School District No. 401 have not submitted school capital  
47 facilities plans for the period from 2014-2019; and  
48

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SCHOOL DISTRICTS PURSUANT TO SCC 30.66C.020 AND  
AMENDING THE SCHOOL IMPACT FEE SCHEDULE IN SCC 30.66C.100

1 WHEREAS, PDS reviewed the Districts' 2014-2019 capital facility plans,  
2 including the impact fee calculations using SCC 30.66C.045, consulted with the school  
3 technical review committee authorized by SCC 30.66C.050(3), and determined that  
4 each 2014-2019 capital facilities plan meets the requirements of SCC 30.66C.040 and  
5 Appendix F of the GMACP - General Policy Plan ("GPP"); and  
6

7 WHEREAS, the Snohomish County Planning Commission ("the Planning  
8 Commission") held a public hearing on September 23, 2014, on the Districts' 2014-2019  
9 capital facilities plans and the proposed amended impact fee schedule; and  
10

11 WHEREAS, at the conclusion of the public hearing, the Planning Commission  
12 voted to recommend adoption of each of the Districts' 2014-2019 capital facilities plans  
13 and proposed an amended impact fee schedule as shown in its recommendation letter  
14 dated September 24, 2014; and  
15

16 WHEREAS, on November 24, 2014, the County Council held a public hearing  
17 after proper notice, received public testimony related to this Ordinance No. 14-096, and  
18 considered the entire record, including the Planning Commission's recommendations;  
19 and  
20

21 WHEREAS, following the public hearing on November 24, 2014, the County  
22 Council deliberated on this Ordinance No. 14-096; and  
23

24 WHEREAS, the State Environmental Policy Act (SEPA), Chapter 43.21C RCW,  
25 requirements have been satisfied and review has been performed by each school  
26 district acting as lead agency; and  
27

28 WHEREAS, SCC 30.66C.020 provides that any school capital facilities plan  
29 adopted by the County Council shall be incorporated by reference into the capital  
30 facilities element of the GMACP; and  
31

32 WHEREAS, the County Council considered the entire hearing record, including  
33 the Planning Commission's recommendation and written and oral testimony submitted  
34 during the public hearings;  
35

36 NOW, THEREFORE, BE IT ORDAINED:  
37

38 Section 1. The County Council adopts the foregoing recitals as findings of fact  
39 as if set forth in full.  
40

41 Section 2. The County Council makes the following additional findings of fact in  
42 support of this ordinance:  
43

44 A. A school district must prepare and adopt a capital facilities plan that meets  
45 the requirements of Chapter 36.70A RCW and RCW 82.02.020 to participate in the  
46 impact fee program. A school district's capital facilities plan expires two years from the  
47 date of its effective date or when the County Council adopts an updated capital facilities  
48 plan that meets the requirements of Chapter 30.66C SCC and the GMA.  
49

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SCHOOL DISTRICTS PURSUANT TO SCC 30.66C.020 AND  
AMENDING THE SCHOOL IMPACT FEE SCHEDULE IN SCC 30.66C.100

1 B. The Districts submitted capital facilities plans to PDS for the period from  
2 2014-2019 as required under SCC 30.66C.035.  
3

4 C. Arlington School District No. 16, Index School District No. 63, Darrington  
5 School District No. 330, Granite Falls School District No. 332, and Stanwood/Camano  
6 Island School District No. 401 did not submit capital facilities plans for the period from  
7 2014-2019 meaning the County will neither impose nor collect impact fees for those  
8 districts during the 2014-2019 period. Arlington School District No. 16, Index School  
9 District No. 63, Darrington School District No. 330, Granite Falls School District No. 332,  
10 and Stanwood/Camano Island School District No. 401 are not currently listed on the  
11 school impact fee schedule, SCC Table 30.66C.100(1).  
12

13 D. PDS reviewed each of the Districts' 2014-2019 capital facilities plans,  
14 including the impact fee calculations, using the formula in SCC 30.66C.045 and  
15 determined that each capital facilities plan meets the requirements of SCC 30.66C.040.  
16 This determination was made after consultation with the school technical review  
17 committee that reviewed each capital facilities plan prior to the Planning Commission's  
18 public hearing.  
19

20 E. This ordinance is adopted to implement Chapter 30.66C SCC and to adopt  
21 the Districts' 2014-2019 capital facilities plans.  
22

23 F. The adoption of this ordinance exercises the County's authority to impose  
24 impact fees pursuant to RCW 82.02.050.  
25

26 G. The Districts' 2014-2019 capital facilities plans adopted herein will further the  
27 goals of the GMA by providing adequate public school facilities to accommodate growth.  
28

29 H. Amendment of SCC 30.66C.100 is necessary to adopt an updated impact fee  
30 schedule consistent with the Districts' 2014-2019 capital facilities plans.  
31

32 I. Pursuant to SCC 30.66C.100, the County reduces the amount of the impact  
33 fee calculated by the Districts by fifty percent.  
34

35 J. SEPA requirements have been satisfied by each school district, acting as lead  
36 agency, completing an environmental checklist and issuing a Determination of  
37 Nonsignificance for its capital facilities plan. The County adopts and incorporates by  
38 this reference the SEPA determinations made by the respective school districts.  
39

40 K. The Planning Commission reviewed the Districts' 2014-2019 capital facilities  
41 plans, conducted a public hearing on each 2014-2019 capital facilities plan and made its  
42 recommendation as evidenced in its recommendation letter dated September 24, 2014.  
43

44 L. The County Council conducted a public hearing on November 24, 2014, on  
45 this Ordinance No. 14-096.  
46

47 Section 3. The County Council makes the following conclusions:  
48

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SCHOOL DISTRICTS PURSUANT TO SCC 30.66C.020 AND  
AMENDING THE SCHOOL IMPACT FEE SCHEDULE IN SCC 30.66C.100

1 A. The Districts' 2014-2019 capital facilities plans each meet the requirements of  
2 the GMA and Appendix F of the GPP.  
3

4 B. The Districts' 2014-2019 capital facilities plans each individually meet the  
5 requirements of Chapter 30.66C SCC and the requirements of Appendix F of the GPP  
6 concerning the operation and administration of a school impact fee program.  
7

8 C. The public participation requirements of the SCC and GMA have been met  
9 through the public hearings conducted by the Planning Commission and the County  
10 Council.  
11

12 D. The adoption of the Districts' capital facilities plans is consistent with the  
13 GMACP, the Countywide Planning Policies for Snohomish County, and the GMA.  
14

15 E. The GMA allows the County to amend the GMACP more frequently than once  
16 per year if the amendment is to the capital facilities element and occurs concurrently  
17 with the adoption or amendment of the County's budget. This criterion is met because  
18 this ordinance will be considered concurrently with the County's 2015 budget ordinance,  
19 fulfilling the GMA, the Snohomish County Charter, and SCC requirements that link the  
20 capital improvement program to the budget.  
21

22 F. Each of the Districts' 2014-2019 capital facilities plans shall be incorporated  
23 by reference into the capital facilities element of the GMACP as provided by SCC  
24 30.66C.055.  
25

26 Section 4. Edmonds School District No. 15's 2014-2019 Capital Facilities Plan,  
27 attached as Exhibit A-1, is adopted and incorporated herein by reference as if set forth  
28 in full and replaces the 2012-2017 capital facilities plan adopted by Ordinance No. 12-  
29 093, based on the foregoing findings and conclusions.  
30

31 Section 5. Everett School District No. 2's 2014-2019 Capital Facilities Plan,  
32 attached as Exhibit A-2, is adopted and incorporated herein by reference as if set forth  
33 in full and replaces the 2012-2017 capital facilities plan adopted by Ordinance No. 12-  
34 093, based on the foregoing findings and conclusions.  
35

36 Section 6. Lake Stevens School District No. 4's 2014-2019 Capital Facilities  
37 Plan, attached as Exhibit A-3, is adopted and incorporated herein by reference as if set  
38 forth in full and replaces the 2012-2017 capital facilities plan adopted by Ordinance No.  
39 12-093, based on the foregoing findings and conclusions.  
40

41 Section 7. Lakewood School District No. 306's 2014-2019 Capital Facilities Plan,  
42 attached as Exhibit A-4, is adopted and incorporated herein by reference as if set forth  
43 in full and replaces the 2012-2017 capital facilities plan adopted by Ordinance No. 12-  
44 093, based on the foregoing findings and conclusions.  
45

46 Section 8. Marysville School District No. 25's 2014-2019 Capital Facilities Plan,  
47 attached as Exhibit A-5, is adopted and incorporated herein by reference as if set forth  
48 in full and replaces the 2012-2017 capital facilities plan adopted by Ordinance No. 12-  
49 093, based on the foregoing findings and conclusions.

ORDINANCE NO. 14-096  
ADOPTING THE 2014-2019 CAPITAL FACILITIES PLANS FOR THE  
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1  
2 Section 9. Monroe School District No. 103's 2014-2019 Capital Facilities Plan,  
3 attached as Exhibit A-6, is adopted and incorporated herein by reference as if set forth  
4 in full and replaces the 2012-2017 capital facilities plan adopted by Ordinance No. 12-  
5 093, based on the foregoing findings and conclusions.  
6

7 Section 10. Mukilteo School District No. 6's 2014-2019 Capital Facilities Plan,  
8 attached as Exhibit A-7, is adopted and incorporated herein by reference as if set forth  
9 in full and replaces the 2012-2017 capital facilities plan adopted by Ordinance No. 12-  
10 093, based on the foregoing findings and conclusions.  
11

12 Section 11. Northshore School District No. 417's 2014-2019 Capital Facilities  
13 Plan, attached as Exhibit A-8, is adopted and incorporated herein by reference as if set  
14 forth in full and replaces the 2012-2017 capital facilities plan adopted by Ordinance No.  
15 12-093, based on the foregoing findings and conclusions.  
16

17 Section 12. Snohomish School District No. 201's 2014-2019 Capital Facilities  
18 Plan, attached as Exhibit A-9, is adopted and incorporated herein by reference as if set  
19 forth in full and replaces the 2012-2017 adopted by Ordinance No. 12-093, based on  
20 the foregoing findings and conclusions.  
21

22 Section 13. Sultan School District No. 311's 2014-2019 Capital Facilities Plan,  
23 attached as Exhibit A-10, is adopted and incorporated herein by reference as if set forth  
24 in full and replaces the 2012-2017 capital facilities plan adopted by Ordinance No. 12-  
25 093, based on the foregoing findings and conclusions.  
26

27 Section 14. Each 2014-2019 capital facilities plan adopted by this ordinance  
28 shall remain in effect for a period of two years from the effective date of this ordinance,  
29 unless an updated plan is submitted and approved prior to that date pursuant to the  
30 requirements of Chapter 30.66C SCC and the GMA.  
31

32 Section 15. Snohomish County Code Section 30.66C.100, last amended by  
33 Ordinance No. 12-093 on November 19, 2012, is hereby amended to read:  
34

35 **30.66C.100 Fee required.**  
36

37 (1) Each development, as a condition of approval, shall be subject to the school impact  
38 fee established pursuant to this chapter. The school impact fee shall be calculated in  
39 accordance with the formula established in SCC 30.66C.045. The fees listed in Table  
40 30.66C.100(1) represent one-half of the amount calculated by each school district in its  
41 respective capital facilities plan in accordance with the formula identified in SCC  
42 30.66C.045.

43 (2) The payment of school impact fees will be required prior to issuance of building  
44 permits. The amount of the fee due shall be based on the fee schedule in effect at the  
45 time of building permit application.

46 (3) The department shall maintain and provide to the public upon request a table  
47 summarizing the schedule of school impact fees for each school district within the  
48 county.

49 (4) The fees set forth in Table 30.66C.100(1) apply to developments that vest to county

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development regulations from January 1, ~~(2013)~~ 2015 to December 31, ~~(2014)~~ 2016.  
 (5) Building permits submitted after January 1, 1999, for which prior plat approval has been obtained under chapter 30.66C SCC as codified prior to January 1, 1999, shall be subject to the school impact fees established pursuant to this chapter, as set forth in this section, except as provided in SCC 30.66C.010(2).

Table 30.66C.100 (1)  
 SCHOOL IMPACT MITIGATION FEES

SCHOOL DISTRICT	SINGLE FAMILY per dwelling unit	MULTI-FAMILY 1-BEDROOM per dwelling unit	MULTI-FAMILY 2+ BEDROOMS per dwelling unit	DUPLEXES AND TOWNHOMES
Edmonds No. 15	\$0	\$0	\$0	\$0
Everett No. 2	<del>(\$3,798)</del> \$4,988	\$0	<del>(\$2,216)</del> \$1,092	<del>(\$2,216)</del> \$1,092
Lake Stevens No. 4	<del>(\$4,692)</del> \$4,680	\$0	<del>(\$2,915)</del> \$2,532	<del>(\$2,915)</del> \$2,532
Lakewood No. 306	<del>(\$892)</del> \$1,203	\$0	<del>(\$396)</del> \$2,811	<del>(\$396)</del> \$2,811
Marysville No. 25	<del>(\$1,879)</del> \$1,817	\$0	<del>(\$2,882)</del> \$1,180	<del>(\$2,882)</del> \$1,180
Monroe No. 103	<del>(\$1,984)</del> \$0	\$0	<del>(\$3,172)</del> \$0	<del>(\$3,172)</del> \$0
Mukilteo No. 6	<del>(\$2,642)</del> \$3,914	\$0	<del>(\$2,883)</del> \$2,952	<del>(\$2,883)</del> \$2,952
Northshore No. 417	\$0	\$0	\$0	\$0
Snohomish No. 203	<del>(\$896)</del> \$0	\$0	\$0	\$0
Sultan No. 311	\$0	\$0	\$0	\$0

Section 16. The County Council bases its findings and conclusions on the entire record of the County Council, including all testimony and exhibits. Any findings, which should be deemed a conclusion, and any conclusion, which should be deemed a finding, are hereby adopted as such.

Section 17. The effective date of this ordinance shall be January 1, 2015.

Section 18. If any section, sentence, clause or phrase of this ordinance shall be held to be invalid or unconstitutional by the Growth Management Hearings Board or a court of competent jurisdiction, such invalidity or unconstitutionality shall not affect the

1 validity or constitutionality of any other section, sentence, clause or phrase of this  
2 ordinance. If any section, sentence, clause or phrase of this ordinance is held to be  
3 invalid by the board or court of competent jurisdiction, the section, sentence, clause or  
4 phrase in effect prior to the effective date of this ordinance shall be in full force and  
5 effect for that individual section, sentence, clause or phrase as if this ordinance had  
6 never been adopted.

7  
8 PASSED this 24<sup>th</sup> day of November, 2014.

9  
10 SNOHOMISH COUNTY COUNCIL  
11 Snohomish County, Washington

12  
13 /s/ Dave Somers  
14 Chairperson

15  
16 ATTEST:

17  
18 /s/ Debbie Eco

19 Clerk of the Council

20  
21 (X) APPROVED  
22 ( ) VETOED  
23 ( ) EMERGENCY

DATE: 12-10-14

24  
25 /s/ John Lovick  
26 Snohomish County Executive

27  
28 ATTEST:

29  
30 \_\_\_\_\_

31  
32 Approved as to form only:

33  
34 \_\_\_\_\_  
35 Deputy Prosecuting Attorney



Alderwood Elementary & former Educational Service Center about 1950

# 2014-2019 CAPITAL FACILITIES PLAN

EDMONDS  
**15**  
SCHOOL  
DISTRICT  
September, 2014



**2014-2019  
CAPITAL FACILITIES PLAN  
EDMONDS SCHOOL DISTRICT No. 15**

**SCHOOL BOARD MEMBERS**

**Diana White, President**

Director District 5

**Gary Noble, Vice President**

Director District 3

**Kory DeMun, Legislative Representative**

Director District 1

**Ann McMurray**

Director District 2

**April Nowak**

Director District 4

**SUPERINTENDENT**

**Nick Brossoit, Ed. D.**

Adopted by Board of Directors, September, \_\_\_\_2014  
For information on the Edmonds School District Capital Facilities Plan,  
Contact Facilities Operations at (425) 431-7332.

This document is also available at:

[www.edmonds.wednet.edu](http://www.edmonds.wednet.edu)

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## SECTION 1 -- INTRODUCTION

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

This Capital Facilities Plan (CFP) is intended to provide Edmonds School District (District), Snohomish County (County), other jurisdictions, and the community with a description of facilities needed to accommodate projected student enrollment at acceptable levels of service over the next twenty years. A more detailed schedule and financing program for capital improvements over the next six years, (2014-2019) is also included. In accordance with the Growth Management Act (GMA), this CFP contains the following elements:

- An inventory of existing capital facilities owned by the District, showing the locations and capacities of those 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.

Should available funding fall short of meeting existing capital facility needs, the planning jurisdictions will cooperate with the District to reassess the land use element to ensure that land use, the CFP, and financing plan within the CFP are coordinated and consistent. Jurisdictions within ESD#15 include: Brier, Edmonds, Lynnwood, Mountlake Terrace, and the Town of Woodway as well as portions of unincorporated Snohomish County.

In addition to the CFP elements required by the Growth Management Act (GMA), Section 8 of this CFP addresses development fees, mitigation, and other regulatory sources of funding from developers. This report demonstrates that impact fees are not anticipated during the 2014-2019 period.

### **Overview of Edmonds School District**

The District is the largest school district in the County, and the tenth largest of Washington's 296 public school systems. The District covers an area of 36 square miles. The District currently serves a total student population (headcount, including Kindergarten) of 20,308<sup>1</sup> (as of October

---

<sup>1</sup> Headcount differs from FTE in that the figure reflects total number of students served by District educational programming, while FTE is Full Time Enrollment and adjusts for half day attendance by Kindergarten students.

2013) with twenty schools serving grades K-6; two schools serving grades K-8; four schools serving grades 7-8; five schools serving grades 9-12; one resource center for grades K-12 home-schooled students, and one district program for students with severe disabilities. The grade configuration of schools has changed over time in response to the desires of the community, needs of the educational program and variability in financial resources available for staffing classrooms. These changes are made after a process that allows for community participation, with ultimate approval by the Board of Directors.

### **Planning Objectives**

The objective of this CFP is to assess existing school facility capacities, forecast future facility needs within six-year and twenty-year planning horizons, and to articulate a facility and financing plan to address these needs. This CFP replaces and supersedes the District's 2012 Capital Facilities Plan. Much of this report is based on population projections provided by the County. The current projections cycle is 2014 to 2034.

The process of delivering education within the District is not a static function. The educational program changes and adapts in response to the changing conditions within the learning community of the District. This CFP must be viewed as a work-in-progress that responds to the changing educational program and will assist in decision-making. The District monitors proposed new residential growth for impacts and implications to its facility planning and educational programs. Additionally, the District comments, as needed upon proposed new development, working to ensure appropriate provisions for students are factored into a proposed development. Changes to the character of the District are noted as the Southwest Snohomish County Urban Growth Area (UGA) builds out and resulting issues of congestion and affordability occur. These changes may require the District to modify its facilities (i.e., the location, design, etc.), and its educational program (i.e., school year, grade configuration, etc.). Changes would be made in consultation with the community and approved by the Board of Directors.

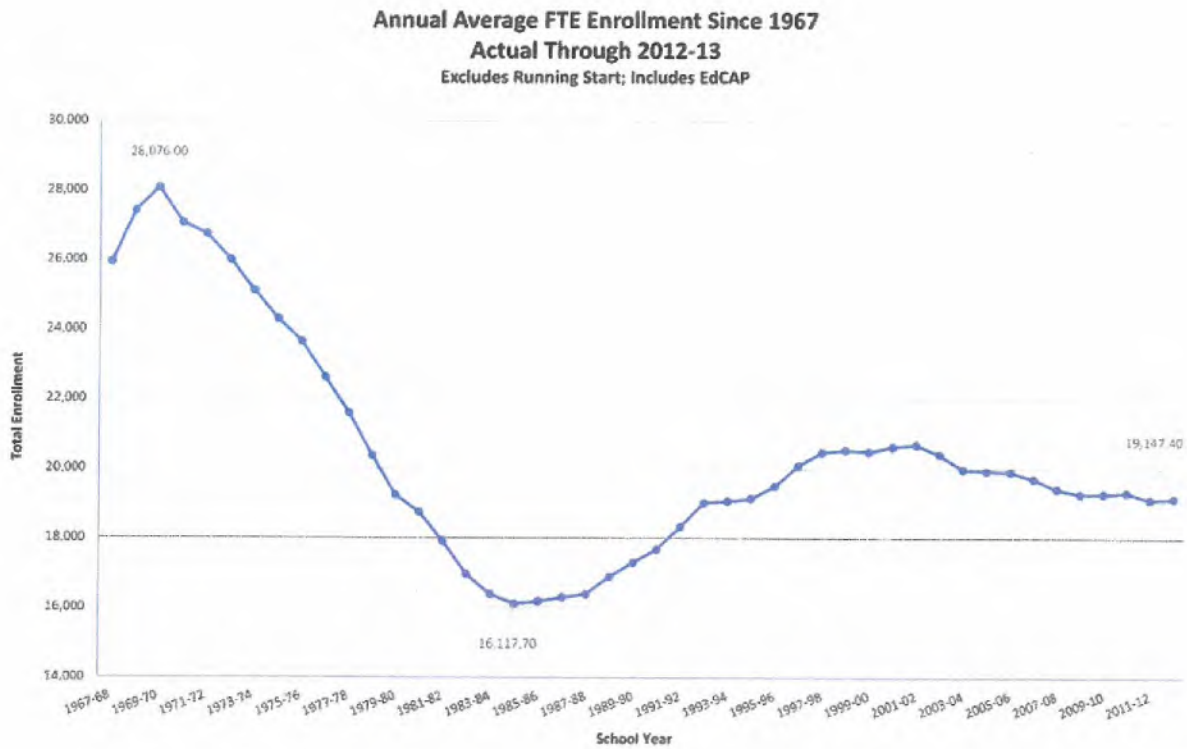
The CFP records and documents how the District utilizes its educational facilities given current District enrollment configurations, educational program standards and locations, fixed capital facilities, and known capital funding sources. Using this information as a platform to look into the future, the CFP analyzes the implications of current variables upon future possibilities and arrives at directional conclusions and courses of action.

The District does not anticipate charging mitigation fees during 2014 through 2019. Supporting materials for this report are referenced by footnote or are listed in the bibliography. Information regarding the planning process is included in this introduction. Building area figures reflect actual capacity as reported to OSPI. This report uses headcount as a standard unit of measure, as opposed to Full Time Equivalencies, (FTE) as explained in Section 2.

**SECTION 2 -- STUDENT ENROLLMENT TRENDS AND PROJECTIONS**

**Historic Trends**

Student enrollment in the District reached its highest levels during the late 1960s and early 1970s, with 28,076 students attending District schools in 1970. Enrollment declined steadily between 1971 and 1985, reaching its lowest level in 1985 at 16,118 students. Enrollment then increased steadily from 1987 through 1998, staying fairly even until 2002 where it has gradually declined until the present.



## **Method**

School districts typically forecast enrollment based on cohort survival: the number of students that remain in a grade group as they transition together from one grade level to the next. Enrollment forecast models are generally based upon trend data from previous years, and as such assume that trends in a particular direction will continue in that direction, (for instance, a series of years in which enrollment declines will forecast as a continuation of those declines). Therefore, enrollment projections are most accurate for the initial years of a forecast period. Underlying cohort survival methodologies are based on assumptions about economic conditions and demographic trends in the current year that become less valid the further into the future the projection is made. Because cohort survival models cannot be applied to kindergarten enrollment (since there are no preceding grade levels), how kindergarten is forecast is important as well. Districts typically forecast kindergarten enrollment using birth rates in the County and may use other factors influencing population growth or decline for the area (termed "net migration").

This capital facilities plan uses two forecast methodologies: one from Edmonds School District; and a second from the Washington State Office of Superintendent of Public Instruction, (OSPI). A comparison to forecast enrollment using the two forecast methodologies is provided in Table 1, and appears as a graph in Figure 1.

For the District's forecast, grade-level projections prepared by an external demographer are used, and updated periodically. The correlation between the District's market share of the overall county population and its share of the county K-12 population is used. Market share is considered to be the percentage of Snohomish County births that are expected to enroll in Kindergarten, (five years later) at one of the County School Districts. Overall K-12 enrollment is forecast based on the forecasted county population in relation to this market share. The remaining grades are forecast using cohort survival rates, adjusted for projected changes in Edmonds' share of county population for the forecast years. Data used includes Snohomish County growth management data prepared by the Office of Financial Management (OFM

For the second model, OSPI calculates an average cohort survival based on the previous six years and applies that rate to recent enrollment in the District to project future enrollment. Kindergarten is projected separately using a linear regression analysis of actual kindergarten enrollment over the previous six years. This method assumes that enrollment trends, which have occurred over the previous six years, will likely continue through the next six years. OSPI updates these projections annually.

Future facility needs are determined, in part by evaluating recent trends in student enrollment and comparing forecast enrollment against available capacity. For this evaluation, October headcount numbers are used. (The month of October is typically the high-water mark for enrollment in a given year). Furthermore, in recent years the state has begun moving towards funding full-day kindergarten which will be fully implemented in the 2017/2018 school year. Kindergarten enrollment is treated as if the students attend full time. While the state only provides funding for some half-day kindergarten programs, the District operates many full-day kindergarten programs, using local funds including tuition and the School Programs and Operations Levy. It is prudent, therefore, to consider the capacity as being consumed as if full-day kindergarten were fully funded.

**Projected Student Enrollment 2014-2019**

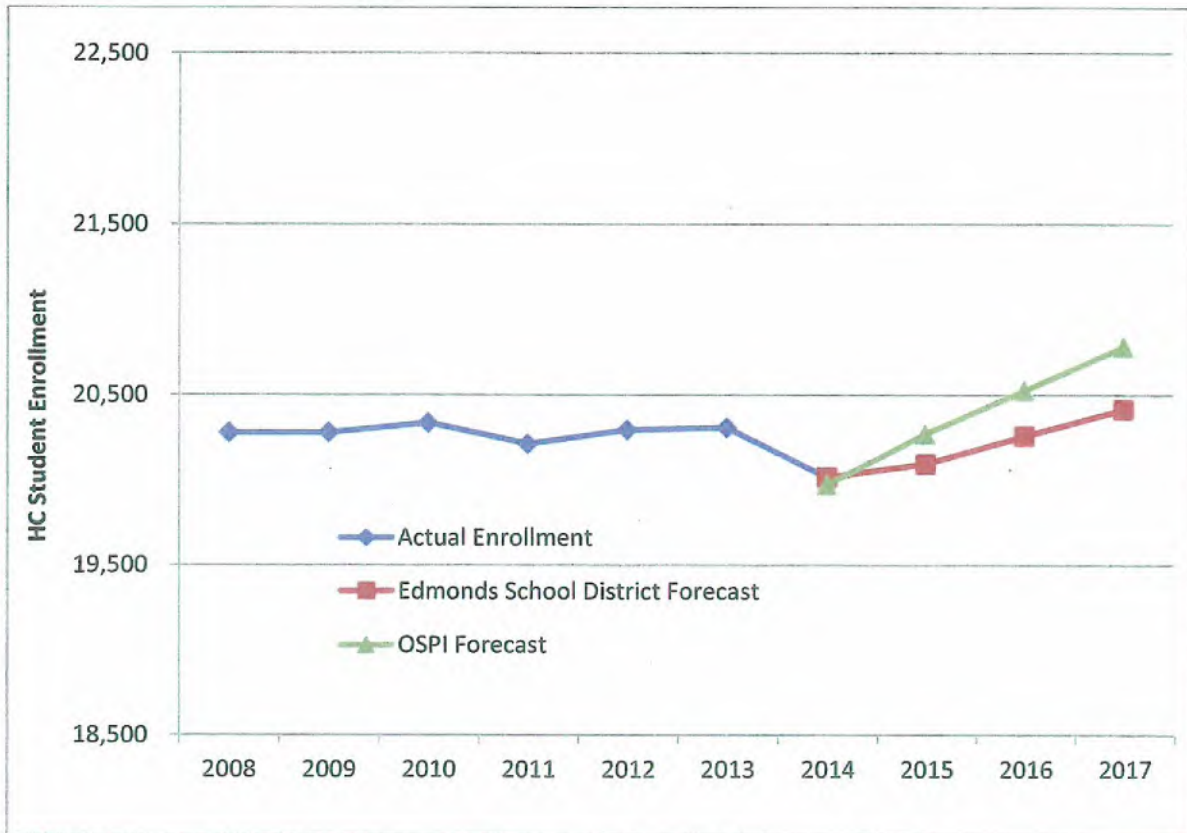
Total enrollment is expected to increase by 440 students by the year 2019, an increase of 2.6% from existing levels. Based on OSPI projections, enrollment in the District would be expected to grow by 1,111 students by the year 2019, an increase of 5.5% from existing enrollment levels. Both forecasts are shown in Table 1 and Figure 2.

**Table 1 – Comparison of Student Enrollment Projections  
Edmonds School District 2013-2019**

	Actual	Forecast						Actual Change	% Change
Source	2013	2014	2015	2016	2017	2018	2019	'13-'19	'13-'19
<b>Edmonds SD</b>	20,308	20,016	20,094	20,258	20,414	20,553	20,748	440	2.2%
<b>OSPI</b>	20,308	19,973	20,272	20,526	20,781	21,044	21,441	1,111	5.5%



**Figure 2 – Comparison of Student Enrollment Projections**



**Table 2 – Projected Student Enrollment by Grade Span  
Edmonds School District 2014-2019**

Grade Span	Actual	Projected						Change 2019	% Change
		2013	2014	2015	2016	2017	2018		
Elementary (K-6)	10,631	10,676	10,760	10,852	11,020	11,123	11,130	499	4.7%
Middle School (7-8)	2,997	2,921	2,942	2,977	3,003	3,036	3,197	200	6.7%
High School (9-12)	6,680	6,418	6,391	6,429	6,392	6,374	6,421	-259	-3.9%
<b>Total</b>	<b>20,308</b>	<b>20,016</b>	<b>20,094</b>	<b>20,258</b>	<b>20,414</b>	<b>20,533</b>	<b>20,748</b>	<b>440</b>	<b>2.2%</b>

Edmonds School District Medium Growth Model: Source: W. Les Kendrick, April 2014  
OSPI School Construction Assistance Program Report 1049, Dec 13, 2013

### 2034 Student Enrollment Projection

The year 2034 student enrollment projections are used by the District in determining its twenty-year facility plan. The long-range plan also operates as a “check” on the six-year plan, and, therefore, is a means to ensure that this CFP is internally consistent, as well as ensuring this CFP’s consistency with other elements of the local planning jurisdictions’ comprehensive plans.

**Table 3 – Projected Student Enrollment Through 2034**

<b>Grade Span</b>	<b>2019 Projected Student Headcount</b>	<b>2027 Projected Student Headcount</b>	<b>2034 Projected Student Headcount</b>
Elementary (K-6)	11,130	11,675	11,747
Middle School (7-8)	3,197	3,398	3,483
High School (9-12)	6,421	7,261	7,755
<b>Total (K-12)</b>	<b>20,748</b>	<b>22,334</b>	<b>22,985</b>

Medium Growth Model: Source: W. Les Kendrick, April 2014

Student Generation Rates (SGR’s) are the average number of students by grade span (elementary, middle school, and high school) typically generated by housing type. Student Generation Rates are calculated based on a survey of all new residential units permitted by the jurisdictions within the school district during the most recent five to eight-year period.

The purpose of SGR’s in the Capital Facilities Plan is to assist districts with the calculation of school impact fees. As the Edmonds School District does not anticipate charging impact fees within the six year horizon, this data is provided in Appendix A for informational purposes only.

### **SECTION 3 -- DISTRICT EDUCATIONAL FACILITY 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, and current understanding of educational best practices, as well as classroom utilization, scheduling requirements and use of relocatable classroom facilities (portables).

Program factors, as well as government mandates, funding or community expectations, affect how classroom space is used. The District's basic educational program is a fully integrated curriculum offering instruction to meet Federal, State, and District mandates. In addition, the District's basic educational program is supplemented by special programs, such as music programs, computer labs, and preschool programs that are developed in response to local community choices. Special programs require classroom space that may reduce the overall capacity of buildings. Some students, for example, leave their regular classroom for a short period of time to receive instruction in special programs. Newer schools within the District have been designed to accommodate most of these programs. Older schools, however, often require space modifications to accommodate special programs, and, in some circumstances, these modifications may reduce the classroom capacity and, therefore, the student capacity of these schools.

Grade configurations have changed over time in response to desires from the community and to provide additional learning opportunities for students. New program offerings continue to evolve in response to research. It is expected that changes will continue in both the type of educational program opportunities and grade clustering being offered by the District.

The total curriculum program, including both the basic educational program and local-choice educational programs, is hereafter referred to as the *total local educational program*. This program may cause variations in student capacity between schools.

District educational program standards will undoubtedly change in the future as a result of changes in the program year, funding, 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, as they relate to class size and facility design capacity, are outlined below for the elementary, middle and high school grade levels. This CFP illustrates the educational program in this manner for the ease of the reader. As noted earlier, other grade configurations also exist.

### **Educational Facility Class Size and Design Capacity Standards for Elementary Schools**

- The District's student to classroom teacher ratio for staffing purposes for grades K-1 is 21.5 students, 25.5 students for grades 2-4; and 27.5 students for grades 5-6.
- Some local-choice educational opportunities for students will be provided in self-contained classrooms designated as resource or program-specific classrooms (e.g. computer labs, music rooms, band rooms, remediation rooms, learning assistance programs).
- Current design capacity for new elementary schools is 25 classrooms with 21 assigned as K-6 or K-8 basic educational program classrooms and four designated as self-contained resource or program-specific classrooms. School capacity will vary between 500 and 550 students.
- The actual capacity of individual schools may be lower than the design capacity depending on the local educational program offered at each school.

The application of these classroom staffing ratios and capacity standards to the District's current educational program causes average classroom utilization in individual schools to vary usually within a range of 17 to 29 students.

### **Educational Facility Class Size and Design Capacity Standards for Middle and High Schools**

- The District utilizes available teaching stations in our secondary schools from between the rate of 83% to over 100% with a class size average of 25.6 students at grades 7 and 8, and 24.8 for grades 9 through 12. At 83% utilization, a teacher's classroom is open one period without students for teacher planning. As the

building increases in student population, and fewer classrooms are able to be freed during the day for planning, higher utilization percentages are seen. In the most difficult cases, the building is over capacity and is using spaces not originally designed for instruction. In the event of overcrowding, the District may remediate by using facilities differently.

- Current design capacity for new middle schools is 750 students, and design capacity at high schools is 1,600. However, actual capacity and actual enrollment of individual schools may vary. Actual capacity may be lower than the design capacity depending on the total local educational programs offered at each school and the size and configuration of older schools. Likewise, actual capacity may be higher than the design capacity based on the design of the District's educational program and the length of the educational day.

The application of these standards is used in section 5 to determine existing and future capacities.

### **Minimum Levels of Service**

#### **Elementary Schools, grades K-6**

With a total of 598 classrooms, the District could accommodate 14,352 elementary school children based upon actual capacity. With significant alteration to educational programming criteria, the District could increase current enrollment by 3,721 students if conditions required it. Current enrollment is 10,631.

#### **Middle Schools, grades 7-8**

With a total of 172 teaching stations, the District could accommodate 4,310 seventh and eighth graders in its K-8 and Middle Schools based on actual capacity. With significant alteration to educational programming criteria, the District could increase enrollment by 1,313. Current enrollment is 2,997

#### **High Schools, grades 9-12**

The District could accommodate 8,599 high school students based upon actual capacity. With significant alteration to educational programming criteria, the District could increase enrollment by an additional 1,919. Current enrollment is 6,680.

## SECTION 4 -- CAPITAL FACILITIES INVENTORY

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 section provides an inventory of capital facilities owned and operated by the District including schools, relocatable classrooms (portables), undeveloped land, developed properties and support facilities. School facility capacity was inventoried based on the space required to accommodate the District's adopted educational program standards for class size and design capacity (see Section 3). A map showing locations of the District's developed educational facilities is provided as Figure 2.

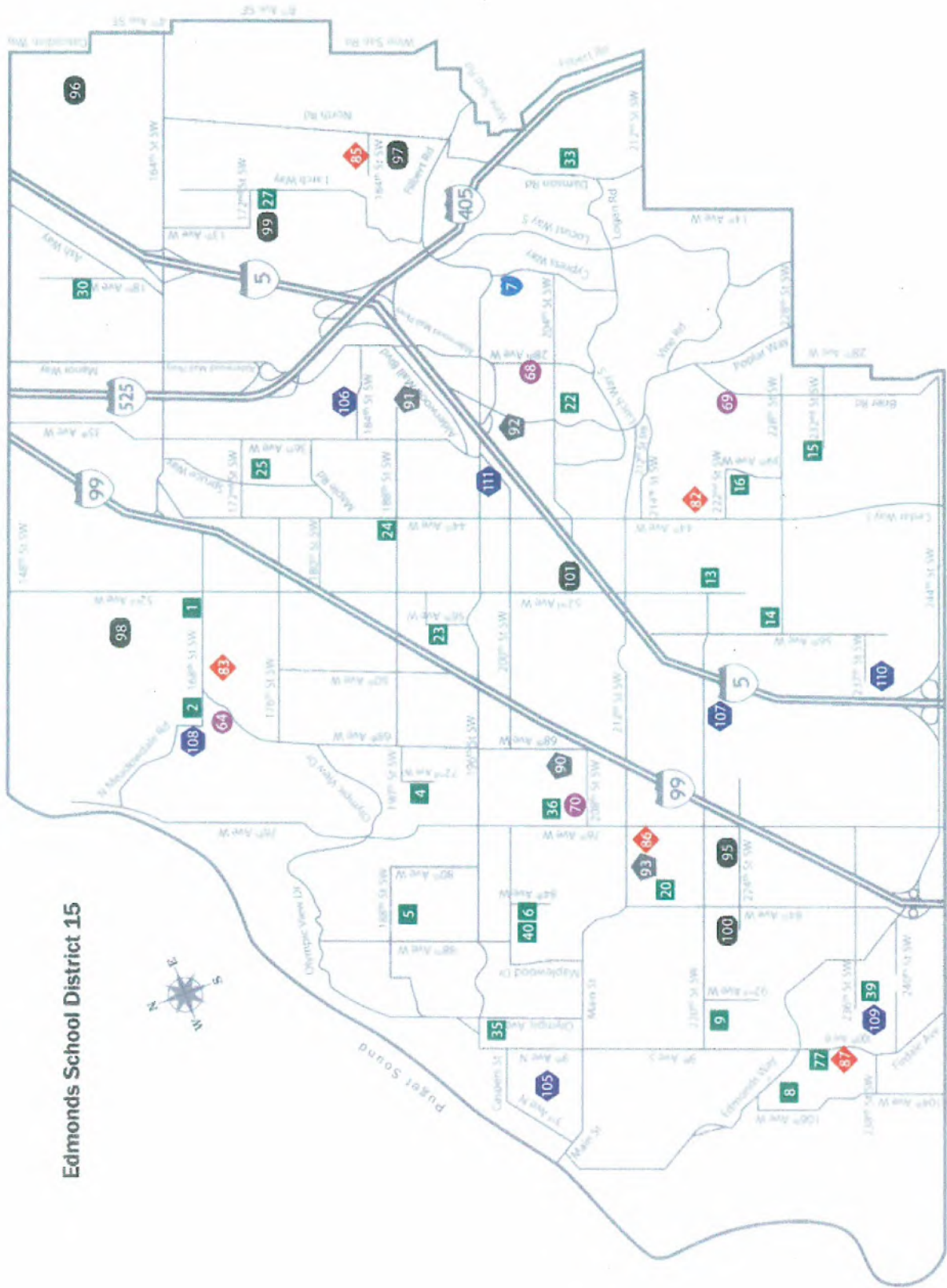
### **Schools**

Edmonds School District currently operates:

- Twenty schools serving grades K-6;
- Two schools serving grades K-8;
- Four schools serving grades 7-8;
- Five schools serving grades 9-12;
- One resource center for K-12 home-schooled students
- One former elementary school as a Leased facility

The Edmonds offers a District program, Maplewood Center, for severely developmentally and physically-challenged students 5 to 21 years of age. Additionally, the District also offers Alderwood Early Childhood Center (AECC) for pre-school children with developmental delays.

**Figure 3 - Inventory of School & Facility Locations**



## Edmonds School District 15

### District Support Sites

- 90 - ESC - Educational Services Center
- 91 - Transportation/Maintenance
- 92 - Warehouse
- 93 - Stadium

### Undeveloped Parcels

- 95 - Esperance
- 96 - Site 29
- 97 - Site 28
- 98 - Site 32
- 99 - Site 7, ML Middle
- 100 - Chase Lake Bog
- 101 - New ESC

### Developed Parcels

- 105 - Civic Field
- 106 - Former Lynnwood High School
- 107 - Former Melody Hill Elementary
- 108 - Meadowdale Playfields
- 109 - Former Woodway Elementary
- 110 - Former Evergreen Elementary
- 111 - Former ESC, Educational Services Center

### Elementary Schools

- 1 - Beverly Elementary
- 2 - Meadowdale Elementary
- 4 - Lynndale Elementary
- 5 - Seaview Elementary
- 6 - Maplewood Center (K-12)
- 8 - Sherwood Elementary
- 9 - Westgate Elementary
- 13 - Mountlake Terrace Elementary
- 14 - Terrace Park School
- 15 - Brier Elementary
- 16 - Cedar Way Elementary
- 20 - Chase Lake Community School
- 22 - Hazelwood Elementary
- 23 - Cedar Valley Community School
- 24 - Lynnwood Elementary
- 25 - Spruce Elementary
- 27 - Martha Lake Elementary
- 30 - Oak Heights Elementary
- 33 - Hilltop Elementary
- 35 - Edmonds Elementary
- 36 - College Place Elementary
- 39 - Madrona School (K-8)
- 40 - Maplewood Parent Cooperative (K-8)
- 77 - Edmonds Heights K-12

### Middle Schools

- 64 - Meadowdale Middle
- 68 - Alderwood Middle
- 69 - Drier Terrace Middle
- 70 - College Place Middle

### High Schools

- 82 - Mountlake Terrace High
- 83 - Meadowdale High
- 85 - Lynnwood High
- 86 - Edmonds-Woodway High
- 87 - Scriber Lake High

### Early Childhood

- 7 - Alderwood Early Childhood Center



### **Program Improvements and Population Growth**

For the last several years, the State of Washington has been moving to an all-day kindergarten model as intended with the passage of House Bills 2261 and 2776. The legislative intent, through these two bills was to fund all-day kindergarten and reduce class sizes in grades one through three. This change has brought about a need for additional space. In 2013 the District constructed two additional classrooms at Spruce Elementary. In 2014 the District added fourteen new portables at seven elementary schools. While this is a response to additional space requirements, the assignment of how and what grade levels will use these remains flexible and may, or may not address kindergarten space needs directly.

The near past and foreseeable future indicates that there will be greater population growth in the North East Quadrant of the District than previously anticipated requiring greater capacity either in structural form or in how current spaces are used.

The District has re-evaluated the relationship between classrooms and how buildings have both changed and how educational programs have grown to use various spaces differently. The traditional use of a classroom count to calculate building capacity has been limited in scope. Classrooms alone, for instance do not include small group instructional areas, the library or gymnasiums. Educational best practices have evolved to allow for more specialized support which has created a shift that amends the traditional classroom model through the use of smaller instructional spaces to provide enhanced opportunity for learning. The process has been on-going for many years and remains a fluid and flexible model to enhance the quality and amount of small group or one-on-one time with students.

In previous editions, the District has measured basic education capacity by determining how, on average, rooms are assigned during the day assuming that not every room is used every period of the day and that teachers have access to their rooms for at least one preparation period each day. The maximum capacity was then reduced by that percentage to determine the basic educational capacity of a school.

A more accurate descriptor, the teaching station has been recognized at the high school level for more than a decade. How and where teaching stations are created is program dependent. Many such educational programs are funded through grants other financial instruments such as agreements with the Gates Foundation, Title 2A and local grants. This is reflected in Table 6 - High School Capacity Inventory whereby the District has not previously listed the number of teaching stations for all buildings.

The new Lynnwood High School and Meadowdale Middle were designed to accommodate this shift from the traditional classroom model and it is anticipated that future buildings will be designed in similar fashion.

In this edition of the Capital Facilities Plan, capacity figures have been refined to mirror current educational practice. The teaching station model, previously used for high schools is now extended to the middle schools as well. Capacity for the elementary level will remain with the classroom model for the time being but may recognize the shift to teaching stations in the future, or as result of state funded changes for smaller class sizes.

It has been a goal of Edmonds School District to reduce class sizes for grades one through six. By employing funds from capital projects that were completed under budget, and proceeds from the voter approved 2014 Bond, the District will realize a reduction from twenty five students per classroom to twenty four. This information is presented in tables 4, 5 and 6.

### **Measures of Capacity**

The OSPI<sup>2</sup> calculates school capacity by dividing gross square footage of a building by a standard square footage per student (e.g.,90 square feet per elementary student, 117 square feet per middle school student, and 130 square feet per high school student)<sup>2</sup>. 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 considered to be an accurate reflection of the actual capacity required to accommodate the adopted educational program of Edmonds School District.

For this plan, school capacity was determined by applying the District's educational facility standards for class size and design capacity to individual schools. It is this capacity calculation that is used to establish the District's maximum capacity and determine future capacity needs based on projected student enrollment.

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<sup>2</sup> WAC 392-343-035 Space allocation

**Table 4 – Elementary School Capacity**

<b>Elementary School</b>	<b>Site Size Acres</b>	<b>Bldg. Area (Sq. Ft.)</b>	<b>Year Built or Last Remodel</b>	<b>Total Class Rooms</b>	<b>Max Student Capacity</b>	<b>Program Capacity</b>
<b>Alderwood</b>	8.9	36,869	1965	20	480	n/a****
<b>Beverly</b>	9.1	48,020	1988	25*	600	528
<b>Brier</b>	10.0	43,919	1989	25	600	552
<b>Cedar Valley</b>	22.1	64,729	2001	25	600	504
<b>Cedar Way</b>	9.4	53,819	1993	25	600	552
<b>Chase Lake</b>	10.3	57,697	2000	25	600	552
<b>College Place</b>	9.0	48,180	1968	27	648	552
<b>Edmonds</b>	8.4	34,726	1966	20	480	444
<b>Hazelwood</b>	10.3	51,453	1987	28*	672	600
<b>Hilltop</b>	9.8	49,723	1967	27	648	600
<b>Lynndale</b>	10.0	39,043	1989	22*	528	456
<b>Lynnwood</b>	8.9	45,460	1962	27*	648	576
<b>Madrona K-8</b>	26.9	85,505	1963	32	768	697
<b>Maplewood K-8</b>	7.4	76,554	2002	27	648	525
<b>Martha Lake</b>	10.0	50,753	1993	26	624	576
<b>Meadowdale</b>	9.1	57,111	2000	25	600	552
<b>Melody Hill***</b>						
<b>Mountlake Terrace</b>	8.0	40,412	1989	23*	552	480
<b>Oak Heights</b>	9.4	49,355	1966	28*	672	612
<b>Seaview</b>	8.3	49,420	1997	22	528	492
<b>Sherwood</b>	13.6	43,284	1966	20	480	420
<b>Spruce**</b>	8.9	43,022	1966	25*	600	504
<b>Terrace Park</b>	15.3	71,664	2002	33	792	744
<b>Westgate</b>	8.1	44,237	1989	21	504	444
<b>Woodway</b>	13.1	37,291	1962	20	480	n/a
<b>Less Grades 7-8</b>						(256)
<b>Totals</b>	<b>264.3</b>	<b>1,222,246</b>		<b>598</b>	<b>14,352</b>	<b>11,706</b>

Source: Facilities Operations Department, Edmonds School District, OSPI

Notes: Maximum capacity = classrooms times 24 students

\* Reflects the addition of portable classrooms per Table 7

\*\* Spruce received two new classrooms in 2013 and three portables in 2014

\*\*\* Demolished in 2013. Melody Hill was not an active school site, but a leased facility and was listed as potential capacity in the event of recapture.

\*\*\*\* Alderwood Early Childhood Center serves Pre-K developmentally challenged children and is not included in total program capacity calculations for K-12 purposes

**Table 5 – Middle School Capacity Inventory**

Middle School	Site Size (acres)	Bld. Area (Sq. Ft.)	Year Built or Last Remodel	Teaching Stations	Max (3) Student Capacity	Program Capacity
Alderwood	19.3	93,882	1988	40	936	856
Brier Terrace	22.7	89,258	1969	38	962	824
College Place	18.7	87,031	1970	40	962	868
Meadowdale	20.7	102,925	2011	35	858	750
Grades 7&8 (1)				19	520	256
Former Woodway (2)					72	72
<b>Totals</b>	<b>81.40</b>	<b>373,096</b>		<b>172</b>	<b>4,310</b>	<b>3,626</b>

Source: Facilities Operations Department, Edmonds School District

Notes:

(1) Grades 7 and 8 housed in K-8 schools.

(2) Edmonds Home School Resource Center housed at former Woodway High School

(3) Maximum Capacity equals 85% utilization of total seats, based on trigger of 31 students for standard classes; 10 students for dedicated special Ed and 15 students for other pull-out.

**Table 6 – High School Capacity Inventory**

High School	Site Size (acres)	Building Area (Sq. Ft.)	Year Built or Last Remodel	Teaching Stations	Maximum Student Capacity 93% Utilization	Program Capacity 80% Utilization
Edmonds-Woodway	28.5	208,912	1998	64*	1,789	1,539
Lynnwood	40.5	217,597	2009	64	1,833	1,577
Meadowdale	40.0	197,306	1998	59*	1,586	1,364
Mountlake Terrace	33.2	211,950	1991	64*	1,791	1,541
Former Woodway (1)	39.0	148,740	1967	55	1,600	1,328
<b>Totals</b>	<b>181.2</b>	<b>984,505</b>		<b>306</b>	<b>8,599</b>	<b>7,349</b>

Source: Facilities Operations Department, Edmonds School District

\*Notes: Capacity may vary depending on education program or schedules. These models assume that teachers use their classrooms one period a day for planning and preparation. If necessary, all classrooms could be used for all periods.

(1) Edmonds Heights and Scriber Lake High programs are housed at former Woodway High School.

## Temporary Classroom Facilities (Portables)

Temporary classrooms provide supplemental housing for students and may be located on a campus for extended periods. They may be used additionally to temporarily house students pending construction of permanent classrooms, or also to provide non-disruptive space for music programs. How portables are used varies widely from storage to occasional use for music programs to transitional classroom space. Two portables at Former Woodway High School are used for storage.

**Table 7 – Temporary Classroom Inventory**

<b>Elementary School Site</b>	<b>Number of Portable Classrooms</b>	<b>Available Units</b>	<b>Interim Student Capacity Provided</b>
Beverly	1*	1	26
College Place Elementary	2	2	52
Hazelwood	2*	2	52
Hilltop Elementary	2	2	52
Lynndale	2*	2	52
Lynnwood	2*	2	52
Mountlake Terrace	2*	2	52
Oak Heights Elementary	2* 1	3	78
Spruce	3*	3	78
Former Woodway High School	4	0	0
<b>Totals</b>	<b>23</b>	<b>19</b>	<b>494</b>

\* New in 2014

In 2014, fourteen portables were added to the facilities inventory to accommodate rapid population growth. The portables at College Place, Hilltop, and one of the units at Oak Heights elementary schools are older units that are nearing the end of their useful lives and, while safe, should not be depended on to provide student capacity in the long term.

In addition to schools, the District owns and operates additional facilities that provide operational support functions to the schools. An inventory of these facilities is provided in Table 8.

**Table 8 – Inventory of Support Facilities**

Facility Name	Building Area (Sq. Ft.)	Site Size (Acres)
Administration Center (ESC)	57,400	5.0
Maintenance/Transportation*	65,000	9.1
Warehouse*	9,600	3.4
District Stadium	7,068	6.0

Source: Facilities Operations Department, Edmonds School District  
 \* To be relocated to the New District Support Center Site

**Land Inventory**

Undeveloped Sites

The District owns nine undeveloped parcels varying in size from 3.3 to 18.9 acres. An inventory of the undeveloped parcels (sites) owned by the District is summarized in Table 9.

**Table 9 – Inventory of Undeveloped Sites**

School District Site Description	Acres	Status	Jurisdiction	Zoning
Chase Lake Bog	7.5	Wetlands South of CLE	Edmonds	Residential R8400
New DSC	19.6	New District Support Center	Lynnwood	Light Industrial
Esperance	3.3	Vacant	Edmonds	Residential R8400
Evergreen	10.3	Letter of intent	MLT	Freeway/Tourist
Former Melody Hill	7.4	Vacant	MLT	Commercial
Site 7 (Middle School)	18.9	Vacant Next to MLE	Sno Co	Residential R9600
Site 28	9.5	Vacant South of LHS	Sno Co	Residential R9600
Site 29	8.9	Vacant N.E. of Martha Lake	Sno Co	Residential R9600
Site 32	9.4	Vacant North of BVE	Sno Co	Residential R8400

Source: Facilities Operations Department, Edmonds School District

Developed Sites

Table 10 provides an inventory of District-owned sites that are currently developed or planned for uses other than schools, and under long-term ground leases. Each lease retains a recapture provision that would allow the District to reclaim the property if needed for school capacity needs. At this time, former ESC and Evergreen are under Purchase and Sale Agreements and in the due diligence phase.

**Table 10 – Inventory of Developed Sites**

Facility/Site	Acres	Status	Jurisdiction	Zoning
Civic Center Playfield	7.9	Leased	Edmonds	Public
Former LHS	40.1	Leased	Lynnwood	Mixed Use Commercial
Meadowdale Playfields	21	Leased	Edmonds	Public
Woodway Elementary	13.1	Leased	Edmonds	RS6000
Old ESC Site	3.9	P&S Agreement	Lynnwood	City Center Core

Source: Facilities Operations Department, Edmonds School District

**SECTION 5 -- PROJECTED FACILITY NEEDS**

**Facility Needs Through 2034**

Projected available student capacity was derived by subtracting projected student enrollment for each of the six years in the forecast period from the existing 2013 school maximum capacity as shown in Table 11. As described above, the District counts portable classrooms as a part of capacity calculations; therefore, supplemental capacity provided by portables is included (information on portables can be found in Table 7).

**Table 11 — Projected Available Student Capacity: 2014–2034**

Grade Span	2014	2015	2016	2017	2018	2019	2034
Elementary	3,676	3,592	3,500	3,332	3,229	3,222	2,605
Middle School	1,389	1,368	1,333	1,307	1,274	1,113	827
High School	2,181	2,208	2,170	2,207	2,225	2,178	844

The District projects that it will have no unhoused students by the end of the initial forecast period (the year 2019). The District will not have to construct any additional classrooms during the short term. The District does have schools that are in need of rebuilding or remodeling within the twenty year planning horizon. When construction funding opportunities arise, the District may seek voter approval for capital construction funds, use revenues from real estate, or evaluate the use of non-voted debt that could be re-paid with property revenues.

While Edmonds School District is not anticipating dramatic population fluctuations in student enrollment until after 2019, population forecasts

suggest that by 2034 the District may still have sufficient capacity but may wish to create capacity in other areas of the district. The District has identified all anticipated capital construction projects in its Six Year Facilities Plan, which is periodically reassessed and revised as necessary, to maintain consistency with long-range projections of facility needs. The District appears to have adequate undeveloped sites for the construction of a new middle school.

## **SECTION 6 -- PLANNED IMPROVEMENTS**

In February 2006, voters approved Capital Construction funding for new Lynnwood High school and Meadowdale Middle. The major construction projects funded with the 2006 bond are complete.

Discussed below is the 2014 Capital Construction Bond scope of work. The majority of the capital construction will be focused on replacing, modernizing and renovating schools and building systems. Many of the District's schools will be remodeled or building systems renovated as funding becomes available.

### **Construction Projects - (Six-Year Plan)**

The 2014 to 2019 period will see activity in the construction of a number of new sites. In February 2014, District voters approved a \$275 million dollar bond issue to replace, expand, modernize and upgrade multiple District facilities. In addition, the District continues to pursue revenue from property sales and leases. Maintenance and Transportation; former ESC property on 196<sup>th</sup> Street SW, and Evergreen will be sold or ground leased, adding to the revenue stream along with the former Lynnwood High School Property. Proceeds from the development of these properties will allow the District to use independent, non-tax dollars for capital construction purposes. These projects are described in Table 12.



**Table 12 – Construction Projects**

<b>Proposed Projects</b>	<b>Estimated Completion Date*</b>	<b>Student Capacity Change</b>	<b>Estimated Project Cost</b>
New Alternative Learning Center	TBD	TBD	TBD
New Maintenance, Transportation and Warehouse	2019	N/A	\$30,000,000
Capital Improvement Projects, multi	2015-2019	N/A	\$40,000,000
New Madrona K-8 Design & construction	2018-2019		\$44,000,000
New Alderwood Middle- Design and Construction	2017	TBD	\$59,000,000
New Lynndale Elementary- Design and Construction	2018		\$32,000,000
Expand/Modernize Lynnwood, Mountlake Terrace and Spruce, Elementary Schools	2018-2019		\$40,000,000
Expand Classroom Capacity at Ten Elementary Schools	2015-2019		\$30,000,000

**Table 13 – Capital Construction Finance Detail in Thousands**

	<b>Budget</b>	<b>Local Funds</b>	<b>State Match</b>	<b>Other</b>
New Alt. Learning Ctr.	TBD	Property Revenue	TBD	TBD
New Maintenance, Transportation and Warehouse	\$30,000,000	2014 Bond	N/A	TBD
New AWM	\$59,000,000	2014 Bond	TBD	TBD
New MAD	\$44,000,000	2014 Bond	TBD	TBD
New LDE	\$32,000,000	2014 Bond	TBD	TBD
Expand/Modernize LWE, MTE, and SPE	\$40,000,000	2014 Bond	TBD	TBD
Expand Classroom capacity at Ten Elementary Schools	\$30,000,000	2014 Bond	N/A	TBD

Completion of these construction projects will allow the District to continue to have sufficient capacity at the elementary, middle, and high school levels to house projected student enrollment through the year 2019 and to update existing classroom and building space to assist in achieving its total local educational program objectives.

**Relocatable Classroom Facilities (Portables) - (Six-Year Plan)**

Nineteen serviceable portables are expected to be in use at school sites throughout the District, providing capacity for full day kindergarten and

reduced class size at the primary grade level. In 2014, the District installed 14 new portables at seven sites, (please see table seven).

### **Site Acquisition and Improvements**

The District currently owns enough school sites to accommodate projected student housing needs through the year 2034.

## **SECTION 7 -- CAPITAL FACILITIES FINANCING PLAN**

Funding of school facilities is secured from a number of sources, with the major source being voter-approved bonds. Other sources may include State matching funds, development fees and mitigations, and proceeds from real-estate leases and surplus property sales. 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. Voters in the District passed a capital construction bond for \$275 million in February 2014.

### **State Match Funds**

State Match Funds come from the Common School Construction Fund. School districts may qualify for State matching funds for specific capital projects based on an eligibility system. State matching funds are generated from a complex formula based on many factors. At the present time, the State provides matching funds on Edmonds School District projects at a rate of 47.02% of ELIGIBLE costs, which are a fraction of actual costs.

State match funds can only be generated by 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 kept pace with enrollment growth, increasing construction costs, or actual square footage constructed per student, matching funds from the State may not be received by a school district until two or three years after a school has been constructed. If a project is to stay on schedule, a District may have to commit to construction without any certainty of when State

matching funds will be available. 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 reserves in the Capital Projects Fund.) When the State share is disbursed (without accounting for escalation), the District's capital projects fund is reimbursed, but without interest earnings or accounting for escalating construction costs.

### **Sales and Ground Lease of District Surplus Property**

School districts are permitted to sell or engage in long-term leases of surplus properties. The proceeds of these activities are deposited in the Capital Facilities Fund and become available to fund capital construction projects. As of 2008, the District has entered into a development agreement for the former Lynnwood High School site, which anticipates a long term 99-year ground lease. Future leases or sales may include the current Maintenance and Transportation site, Evergreen Elementary, Melody Hill Elementary, former Esperance Elementary, and the Lynnwood City Center site, (Former ESC) to provide additional continuing property revenues.

### **Developer Contribution**

Development impact fees authorized by the GMA have been adopted by a number of jurisdictions in the state as a means of supplementing other funding sources for construction of public facilities needed to accommodate new development. To date, Snohomish County is the only jurisdiction within Edmonds School District to adopt an impact fee ordinance. School impact fees are generally collected by the permitting agency at issuance of the building permit or certificates of occupancy. A discussion on impact fees is provided in Section 8. Schools are also eligible to receive developer contributions for impacts attributable to development by operation of other laws, such as the State Environmental Policy Act, and the Subdivision Act.

## **SECTION 8 -- IMPACT FEES**

The County is currently the only local government within the District's jurisdictional boundaries that has adopted a GMA-based impact fee ordinance. The implementing ordinance is found at SCC Title 30.66C. Local city governments within the District's boundaries also have the

ability to adopt their own approach to school impact fee assessment or to adopt an ordinance requiring compliance with the County's 30.66C criteria and incorporating the County-approved CFP by reference. Additionally, the State Environmental Policy Act (SEPA) authorizes jurisdictions to require mitigation for impacts directly related to a proposed development. In the previous years, some impacts to schools resulting from new residential development have been mitigated through voluntary agreements negotiated on a case-by-case basis. The State subdivision code also addresses the need to provide appropriate provisions for schools (Chapter 58.17 RCW).

The District does not presently anticipate collecting impact fees, because school capacity is adequate to house current and future enrollment projections. This conclusion is based on information available at the time of publication. Given the dynamic development of additional residential capacity within the District's borders, the District cannot rule out the need for future fees. In preparation for the time when such fees may be needed, the District requests that all jurisdictions adopt a school impact fee ordinance that will allow the District to make use of this source of revenue should the need arise. The District will closely monitor development as it occurs and will actively seek appropriate developer contributions for impacts upon the District on a case-by-case basis as authorized by applicable law.

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W. Les Kendrick PhD, April, 2014

Snohomish County Tomorrow 2009/2010 Growth Monitoring Report,  
Snohomish County Planning & Development Services, December 2010.

Student Generation Rate Study for Edmonds School District,  
Doyle Consulting, April 3, 2014

## Appendix A



### **Student Generation Rate Study for the Edmonds School District**

4/3/2014

This document describes the methodology used to calculate student generation rates (SGRs) for the Edmonds School District, and provides results of the calculations.

SGRs were calculated for two types of residential construction: Single family detached, and multi-family with 2 or more bedrooms. Attached condominiums, townhouses and duplexes are included in the multi-family classification since they are not considered "detached". Manufactured homes on owned land are included in the single family classification.

1. Electronic records were obtained from the Snohomish County Assessor's Office containing data on all new construction within the Edmonds School District from January 2006 through December 2012. As compiled by the County Assessor's Office, this data included the address, building size, assessed value, and year built for new single and multi-family construction. The data was "cleaned up" by eliminating records which did not contain sufficient information to generate a match with the District's student record data (i.e. incomplete addresses).
2. The District downloaded student records data into Microsoft Excel format. This data included the addresses and grade levels of all K-12 students attending the Edmonds School District as of April 2014. Before proceeding, this data was reformatted and abbreviations were modified as required to provide consistency with the County Assessor's data.

3. **Single Family Rates:** The data on all new single family detached residential units in County Assessor's data were compared with the District's student record data, and the number of students at each grade level living in those units was determined. The records of 2,357 single family detached units were compared with data on 20,423 students registered in the District, and the following matches were found by grade level(s)\*:

GRADE(S)	COUNT OF MATCHES	CALCULATED RATE
K	69	0.029
1	96	0.041
2	75	0.032
3	69	0.029
4	62	0.026
5	61	0.026
6	68	0.029
7	51	0.022
8	53	0.022
9	48	0.020
10	67	0.028
11	50	0.021
12	74	0.031
K-6	500	0.212
7-8	104	0.044
9-12	239	0.101
K-12	843	0.358

4. *Large Multi-Family Developments:* Snohomish County Assessor's data does not specifically indicate how many units or bedrooms are contained in large multi-family developments. Additional research was performed to obtain this information from specific parcel ID searches, and information provided by building management when available. Information obtained included the number of 0-1 bedroom units, the number of 2+ bedroom units, and specific addresses of 0-1 bedroom units were obtained when possible. In cases where information had been gathered previously for a prior SGR study, prior study information was used.

*Small Multi-Family Developments:* This method included all developments in the County Assessor's data containing four-plexes, tri-plexes, duplexes, condominiums and townhouses. This data contained information on the number of bedrooms for all townhouses and condominiums. Specific parcel ID searches were performed for duplex and larger units in cases where number of bedroom data was missing.

5. **Multi-Family 2+ BR Rates:** The multi-family 2+ BR SGR's were calculated by comparing data on 2+ BR multi-family units with the District's student record data, and the number of students at each grade level living in those units was determined. The records of 1,024 multi-family 2+ BR units were compared with data on 20,423 students registered in the District, and the following matches were found by grade level(s)\*:

GRADE(S)	COUNT OF MATCHES	CALCULATED RATE
K	27	0.026
1	16	0.016
2	15	0.015
3	14	0.014
4	12	0.012
5	10	0.010
6	6	0.006
7	10	0.010
8	16	0.016
9	8	0.008
10	10	0.010
11	10	0.010
12	16	0.016
K-6	100	0.098
7-8	26	0.025
9-12	44	0.043
K-12	170	0.166

6. **Multi-Family 0-1 BR Rates:** Research indicated that 129 multi-family 0-1 BR units were constructed within District boundaries during the time period covered by this study. These units were compared with the data on 20,423 students registered in the District. While one (1) match was found, the small sample size does not lend itself to calculating an effective SGR.

7. **Summary of Student Generation Rates\*:**

	K-6	7-8	9-12	K-12
Single Family	.212	.044	.101	.358
Multi-Family 2+ BR	.098	.025	.043	.166

\*Calculated rates for grade level groups may not equal the sum of individual grade rates due to rounding.

### Comparison, 2012 - 2014

Single Family Rates				
2012		GRADE(S)	2014	
COUNT OF MATCHES	CALCULATED RATE		COUNT OF MATCHES	CALCULATED RATE
123	0.039	K	69	0.029
107	0.034	1	96	0.041
108	0.035	2	75	0.032
102	0.033	3	69	0.029
115	0.037	4	62	0.026
91	0.029	5	61	0.026
86	0.028	6	68	0.029
87	0.028	7	51	0.022
94	0.030	8	53	0.022
88	0.028	9	48	0.020
106	0.034	10	67	0.028
111	0.036	11	50	0.021
89	0.029	12	74	0.031
732	0.235	K-6	500	0.212
181	0.058	7-8	104	0.044
394	0.127	9-12	239	0.101
1307	0.420	K-12	843	0.358

Multi-family Rates				
2012		GRADE(S)	2014	
COUNT OF MATCHES	CALCULATED RATE		COUNT OF MATCHES	CALCULATED RATE
23	0.020	K	27	0.026
16	0.014	1	16	0.016
21	0.018	2	15	0.015
19	0.017	3	14	0.014
10	0.009	4	12	0.012
14	0.012	5	10	0.010
10	0.009	6	6	0.006
11	0.010	7	10	0.010
17	0.015	8	16	0.016
16	0.014	9	8	0.008
16	0.014	10	10	0.010
17	0.015	11	10	0.010
9	0.008	12	16	0.016
113	0.099	K-6	100	0.098
28	0.025	7-8	26	0.025
58	0.051	9-12	44	0.043
199	0.175	K-12	170	.0166

Source: ESD Facilities Operations



**EVERETT SCHOOL DISTRICT No. 2**

# **CAPITAL FACILITIES PLAN**

**2014 – 2019**

**August 26, 2014**

Produced by Everett School District No. 2

**EVERETT SCHOOL DISTRICT NO. 2**

**RESOLUTION NO. 1095**

**Capital Facilities Plan 2014-2019**

A Resolution of the Board of Directors (the "Board") of the Everett School District No. 2 (the "District") to adopt a Capital Facilities Plan (the "Plan") for school facilities conforming to requirements of the State Growth Management Act and the Snohomish County General Policy Plan.

**WHEREAS**, in August 1998, the District approved Resolution 651 adopting a Capital Facilities Plan meeting the requirements of RCW 36.70A (the Growth Management Act) and the Snohomish County General Policy Plan; and

**WHEREAS**, in June 2000, September 2002, September 2004, August 2006, August 2008, August 2010, and August 2012 the District approved Resolutions 700, 742, 799, 860, 907, 1004, and 1046 adopting updated Capital Facilities Plans meeting the requirements of RCW 36.70A (the Growth Management Act) and the Snohomish County General Policy Plan; and

**WHEREAS**, Districts are required to update their Capital Facilities Plan every two years in compliance with the Act and the General Policy Plan; and

**WHEREAS**, this Plan update was developed by the District in accordance with accepted methodologies and requirements of the Growth Management Act; and

**WHEREAS**, the proposed impact fees utilize calculation methodologies meeting the conditions and tests of RCW 82.02; and

**WHEREAS**, a draft of the Plan was submitted to the Snohomish County Department of Planning and Development Services for review with changes having been made in accordance with Department comments; and

**WHEREAS**, the District finds that the Plan meets the basic requirements of RCW36.70A and RCW 82.02; and

**WHEREAS**, the District conducted a review of the Plan in accordance with the State Environmental Policy Act, state regulations implementing the act, and District policies and procedures;

**Now, Therefore Be It Resolved as follows:**

1. The 2014 Capital Facilities Plan for the years 2014-2019 is hereby adopted by the District.
2. The Snohomish County Council is hereby requested to adopt the Plan by reference as part of the capital facilities element of the County's General Policy Plan.
3. The Cities of Mill Creek and Everett are hereby requested to adopt the Plan by reference as part of the Capital Facilities Plan element of their respective General Policy Plans.

**ADOPTED** this \_\_\_\_ day of \_\_\_\_\_, 2014 and authenticated by the signatures affixed below.

By: \_\_\_\_\_  
Pam LaSesne, President

By: \_\_\_\_\_  
Caroline Mason, Member

By: \_\_\_\_\_  
Carol Andrews, Vice President

By: \_\_\_\_\_  
Tracy Mitchell, Member

ATTEST:  
By: \_\_\_\_\_  
Dr. Gary D. Cohn, Superintendent  
and Secretary for the Board

By: \_\_\_\_\_  
Ted Wentta, Member

**CAPITAL FACILITIES PLAN  
2014-2019  
EVERETT SCHOOL DISTRICT No. 2**

**BOARD OF DIRECTORS**

Pam LaSesne, President  
Carol Andrews, Vice President  
Caroline Mason, Member  
Traci Mitchell, Member  
Ted Wenta, Member

**SUPERINTENDENT**

Dr. Gary D. Cohn

August 26, 2014

For information on the Everett School District's Capital Facilities Plan contact Michael Gunn, Executive Director Facilities and Operations, Everett School District No. 2, P.O. Box 2098, Everett WA 98213, Phone (425) 385-4190, email: [mgunn@everettsd.org](mailto:mgunn@everettsd.org)

**EVERETT SCHOOL DISTRICT No. 2**  
**CAPITAL FACILITIES PLAN**  
**2014-2019**

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*Section 1*

*Introduction*

## SECTION 1: INTRODUCTION

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

The Washington Growth Management Act (GMA) outlines thirteen broad goals including adequate provision of necessary public facilities and services. Schools are among these necessary facilities and services. The public school districts serving Snohomish County residents have developed 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.

This Capital Facilities Plan (CFP) is intended to provide the Everett School District (District), Snohomish County, and other jurisdictions a description of facilities needed to accommodate projected student enrollment at acceptable levels of service through the year 2035, and a more detailed schedule and financing program for capital improvements over the six year period 2014-2019.

In accordance with GMA mandates, and Chapter 30.66C Snohomish County Code (SCC), this CFP contains the following required elements:

- Future enrollment forecasts for each grade span (elementary, middle, and high).
- An inventory of existing capital facilities owned by the district, showing the locations and student capacities of the facilities.
- A forecast of the future needs for capital facilities and school sites, distinguishing between existing and projected deficiencies.
- The proposed capacities of expanded or new capital facilities.
- A 6-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. The financing plan and/or the impact fee calculation formula must also differentiate between projects or portions of projects which address existing deficiencies (ineligible for impact fees) and those which address future growth-related needs.
- A calculation of impact fees to be assessed and support data substantiating said fees.
- In developing this CFP, the guidelines of Appendix F of the General Policy Plan were used as follows:
- Information was 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 is to be consistent with the State Office of Financial Management (OFM) population forecasts and those of Snohomish County.
- Chapter 30.66C SCC requires that student generation rates be independently calculated by each school district. Rates were updated for this CFP.

- The CFP complies with RCW 36.70A (the Growth Management Act) and, where impact fees are to be assessed, RCW 82.02.
- The calculation methodology for impact fees meets the conditions and tests of RCW 82.02. Districts which propose the use of impact fees should identify in future plan updates alternative funding sources in the event that impact fees are not available due to action by the state, county or the cities within their district boundaries.

Unless otherwise noted, all enrollment and student capacity data in this CFP is expressed in Full Time Equivalent (FTE)<sup>1</sup> as of October 1 of the year indicated.

### **Overview of the Everett School District**

The Everett School District stretches approximately fifteen miles from its northernmost boundary at the Union Slough to 194th Street S.E. at its southernmost boundary. The average width is a little more than two and a half miles. The district contains an area of approximately 39 square miles. The district includes most of the City of Everett, all but a very small portion of the City of Mill Creek, and portions of unincorporated Snohomish County. Total population within the district in 2013 is estimated at 132,626 (Snohomish County GMA Population Forecast).

The district serves 17,986 students FTE (October 2013 – OSPI Report 1049) in seventeen elementary schools, five middle schools, three comprehensive high schools, one alternative high school, and 83 portable classrooms. The full and part-time district staff is approximately 2,200.

### **Significant Issues Related to Facility Planning in the Everett School District**

The most significant school facility related issues facing the Everett School District are: 1) availability of real property appropriate for anticipated future school facilities needs, 2) the need to upgrade older facilities so they can continue to serve students in the decades ahead, 3) the need to meet state mandates: Full-Day Kindergarten at all schools for all students, Reduction in K-3 class sizes to a 17:1 student to teacher ratio, the expansion of the high school graduation requirements (fine arts and science), and 4) the need to construct new facilities and building additions to meet the growth in enrollment.

- The district anticipates the need for additional elementary school sites by 2035 for un-housed students as well as new classroom facilities at all grade levels will need to be constructed. Projections for un-housed students are based on enrollment growth and planned program changes.
- The district anticipates the availability of appropriate sized property for new schools will continue be a challenge. The number of suitable, strategically located, properties continues to diminish.
- The most recently completed modernizations are Monroe Elementary School, View Ridge Elementary School, and Everett High School’s Gymnasium building.
- In addition to major new construction and modernization work on school facilities, the district finds it necessary to address other district-wide needs. Mechanical system upgrades, roofing replacements, seismic upgrades, technology upgrades, and building envelope upgrades are among these needs.

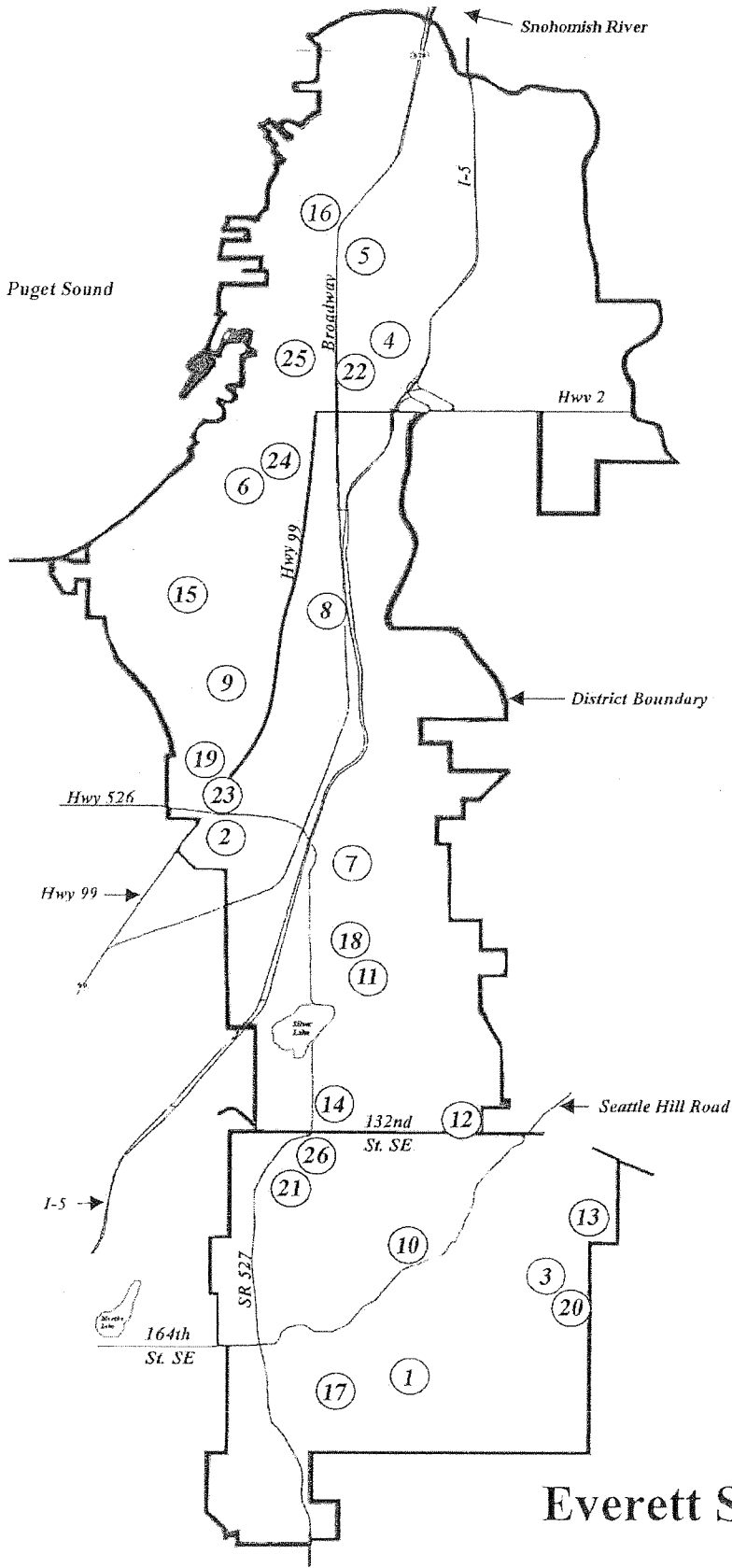
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<sup>1</sup> Full Time Equivalents (FTE) – includes half of the students attending Kindergarten, and all students attending grades 1-12.

The district construction program in recent years has been financed in large part by passage of a 198.9 million bond issue in 2006. The 2006 bond included the funding for: a new elementary school, school modernizations, property acquisitions, technology upgrades, as well as a variety of other projects. The district recently sought voter approval of a \$259.4 million bond measure, however the proposal failed to receive the required 60% approval threshold. In 2010 the voters approved a \$48 million six year capital levy. This levy includes district-wide technology upgrades, roofing replacements, flooring replacements, HVAC upgrades, and other well needed projects. Other funding has come from state financing assistance, school growth mitigation and school impact fees.

- The district currently implements a forty-year modernization schedule for all of its facilities. This schedule is divided into five eight-year phases. Each phase has seven to nine modernization projects. The district recently completed the final three projects in Phase I which runs through 2014.





**Figure 1**  
**Map of School Facilities**



Approximate Scale: 1 mile

- School Facilities**
1. Cedar Wood ES
  2. Emerson ES
  3. Forest View ES
  4. Garfield ES
  5. Hawthorne ES
  6. Jackson ES
  7. Jefferson ES
  8. Lowell ES
  9. Madison ES
  10. Mill Creek ES
  11. James Monroe ES
  12. Penny Creek ES
  13. Silver Firs ES
  14. Silver Lake ES
  15. View Ridge ES
  16. Whittier ES
  17. Woodside ES
  18. Eisenhower MS
  19. Evergreen MS
  20. Gateway MS
  21. Heatherwood MS
  22. North MS
  23. Cascade HS
  24. Sequoia HS
  25. Everett HS
  26. H.M. Jackson HS

**Everett School District No. 2**

*Section 2*

*Definitions*

## SECTION 2: DEFINITIONS

Note: Definitions of terms preceded by an asterisk (\*) are provided in Ordinance 97-095 as amended by Ordinance 99-107. They are included here, in some cases with further clarification to aid in the understanding of the Capital Facilities Plan. Any such clarifications provided herein in no way affect the legal definitions and meanings assigned to them in Ordinance 97-095, as amended.

- \* **Appendix F** - Appendix F of the Snohomish County Growth Management Act (GMA) Comprehensive Plan also referred to as the General Policy Plan (GPP).
- \* **Average Assessed Value** - the average assessed value, by dwelling unit type, of all residential units constructed within the district.
- Board** - the Board of Directors of the Everett School District No. 2 (“School Board”).
- \* **Boeckh Index** - the current construction trade index of construction costs for each school type. (OSPI currently refers to this index as the Area Cost Analysis)
- \* **Capital Facilities** - school facilities identified in the district's capital facilities plan and are “system improvements” as defined by the GMA as opposed to localized “project improvements”.
- \* **Capital Facilities Plan (CFP)** - the district’s facilities plan adopted by its school board consisting of those elements required by Chapter 30.66C SCC and meeting the requirements of the GMA and Appendix F of the General Policy Plan. The definition refers to this document.
- \* **Council** - Snohomish County Council.
- \* **County** - Snohomish County.
- \* **Developer** - 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** - 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** - any residential construction or expansion of a building, structure or use of land or any other change of 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** - any written authorization from the County which authorizes the commencement of a development activity.
- \* **Director** - the Director of the Snohomish County Department of Planning and Development Services (PDS), or the Director’s designee.

**District** - Everett School District No. 2.

- \* **District Property Tax Levy Rate** - the district's current capital property tax rate per thousand dollars of assessed value.
- \* **Dwelling Unit Type** - (1) single-family residences, (2) multi-family one-bedroom apartment or condominium units and (3) multi-family multiple-bedroom apartment or condominium units.
- \* **Encumbered** - 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** - 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.
- \* **Facility Design Capacity** - the number of students each school type is designed to accommodate; based on the district's standard of service as determined by the district.

**FTE (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 one FTE if he/she is enrolled for the equivalent of a full schedule each school day. Some students attend state-funded full-day kindergarten programs and therefore are counted as 1.0 FTE. The balance of the kindergarten students attend half-day programs and are counted as 0.5 FTE. For purposes of this Capital Facilities Plan, first through twelfth grades are considered to contain 1.0 FTE per student.

**GFA (per student)** - the Gross Floor Area per student.

- \* **Grade Span** - a category into which the district groups its grades of students (e.g., elementary, middle or junior high, and high school). Grade spans for the Everett School district include grades K-5 for elementary level, grades 6-8 for middle school, and grades 9-12 for senior high school.
- \* **Growth Management Act/GMA** - 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** - the current interest rate as stated in the Bond Buyer Twenty-Bond General Obligation Bond Index.
- \* **Land Cost Per Acre** - 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 Dwelling Unit** - any residential dwelling unit that is not a single-family unit as defined by the ordinance.<sup>2</sup>

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

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

- \* **Permanent Facilities** - school facilities of the district with a fixed foundation.

**Portables** - Synonym for relocatable facilities.

**RCW** - Revised Code of Washington.

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<sup>2</sup> For purposes of calculating Student Generation Rates, assisted living or senior citizen housing is not included in this definition.

\* **Relocatable Facilities** (also referred to as Portables) - 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 the 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** - the total cost, based on actual costs incurred by the district, for purchasing and installing portable classrooms.

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

\* **School Impact Fee** - 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** - State Environmental Policy Act.

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

\* **Standard of Service** - the standard adopted by the 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 Funding Assistance Percentage** - 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 or Student Generation Rate (SGR)** - the number of students of each grade span (elementary, middle/junior high, high school) that the district determines are typically generated by different dwelling unit types within the district. The 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 the district.

**Subdivision** - small and large lot subdivisions as defined in Title 19 of the Snohomish County Code, and all short subdivisions as defined in Title 20 which are within the definition of "development" above.

**Teaching Station** - a facility space (classroom) specifically dedicated to implementing the district's educational program and capable of accommodating at any one time, at least a full class of up to 32 students. In addition to traditional classrooms, these spaces can include computer labs, auditoriums, gymnasiums, music rooms and other special education and resource rooms.

**Un-housed Students** - students projected to be housed in classrooms where class size exceeds standards within the district and students projected to be housed in portable classrooms.

**WAC** - Washington Administrative Code.

*Section 3*

*Educational Program Standards*

## SECTION 3: EDUCATIONAL PROGRAM STANDARDS

### Educational Program Standards

School facility and student capacity needs are dictated by the types and amount of space required to accommodate the school board adopted educational programs. 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, government mandates and community expectations may affect how classroom space is used. Traditional educational programs offered by the Everett School District are supplemented by nontraditional or special programs, such as: Special Education, English Language Learner, remediation programs, alcohol and drug education, AIDS education, preschool and daycare programs, computer labs, music programs, Career and Technical Education, Accelerated Learning Support Classes (ALS), etc. These special or nontraditional educational programs can have a significant impact on the available student capacity of school facilities.

Examples of special teaching stations and programs offered by the Everett School District:

- Accelerated Learning Support
- Activities
- Advanced Placement
- Athletics, Health and Fitness
- Contract Learning
- Career Counseling
- Denny Youth Center Services
- Drug and Alcohol Counseling
- ECEAP (Early Childhood Educational Assistance Program)
- Elementary Music (designated classroom)
- English Language Learner (ELL)
- Health Services
- Highly Capable Program
- Homeschool Alternative Program – Port Gardner
- Intervention Services – Counseling, Social Work
- Learning Assistance Program (LAP)
- Leadership
- Library Instruction
- Lighthouse Cooperative
- Online High School
- Readiness to Learn Parent Center
- Science Resource Center
- Special Education
  - Deaf and Hard of Hearing Specialists
  - Developmental Kindergarten
  - Developmental Pre-School
  - Extended Resource Room
  - GOAL – Gaining Ownership of Adult Life (post high school)



*Special Education – continued*

- Life Skills
- Occupational / Physical Therapy
- Positive Behavior Support
- Resource Room
- School Psychologists
- Speech and Hearing Therapy
- STRIVE – Students Transitioning Responsibility into Vocational Experiences (post high school)
- Vision Impaired Service
- Technology Instruction
- Time-Out Room (In-School Suspension)
- Title I Programs - Reading and Math
- Vocational
  - Auto Shop
  - Business and Marketing
  - Health and Human Services
  - Horticulture, Agriculture, Floriculture
  - Technology and Industry
- Wireless Computer Carts

Variations in student capacity between schools are often a result of special programs offered at specific schools. These special programs require classroom space, which can reduce the permanent capacity of the buildings housing these programs. Some students, for example, leave their regular classroom for a period of time to receive instruction in these special programs. Newer schools within the district have been designed to accommodate many 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 building.

District educational program standards will undoubtedly change in the future as a result of changes in the program year, special programs, class size, grade span configurations, use of new technology, and 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.

### **Educational Program Standards for Elementary Schools**

- Class size targets are:
  - 22 Kindergarten
  - 24 General Education - Grades 1-5
  - 10 Special Education - Pre-School (self-contained)
  - 10 Special Education - Kindergarten (self-contained)
  - 10 Special Education - Positive Behavior Support
  - 15 Special Education - Extended Resource Room
  - 10 Special Education - Life Skills
- Students are provided music instruction in a separate classroom.
- Students are scheduled into the computer lab as a pull-out program.
- All elementary schools should strive to offer at least one Full-Day Kindergarten class and one Special Education Resource Room as part of their curriculum.
- The optimum design capacity for elementary schools is 550-565 students (FTE).

- Actual capacity of individual schools may vary depending on the educational programs offered and/or housed at a particular school.

### **Educational Program Standards for Middle and High Schools**

As a result of scheduling conflicts for student programs, the need for specialized rooms for specific programs, and the need for teachers to have a workspace during planning periods, it is not possible to achieve 100% utilization of teaching stations. Based on an analysis of actual utilization of secondary schools, the standard utilization rate is 85%, resulting in the following target class sizes.

#### **Middle School**

- Class size targets:
  - 24.3 General Education - Grades 6-8
  - 24.3 Special Education - Resource Room
  - 15 Special Education - Extended Resource Room
  - 10 Special Education - Life Skills
  - 10 Special Education - Positive Behavior Support
  - 18 English Language Learner (ELL)

#### **High School**

- Class size targets:
  - 24 General Education - Grades 9-12
  - 24 Special Education - Resource Room
  - 15 Special Education - Extended Resource Room
  - 10 Special Education - Life Skills
  - 10 Special Education - Positive Behavior Support
  - 18 English Language Learner (ELL)

#### **Alternative High School**

- Class size targets:
  - 24 General Education - Grades 9-12
  - 24 Special Education - Resource Room
- Students are also provided educational opportunities in classrooms such as:
  - Art Labs
  - Auto Shop (high school only)
  - Challenge, College in the High School, and Advanced Placement Program
  - Computer Labs (two at middle school and three at high school)
  - Drama rooms (high school only)
  - Health and Fitness
  - Home and Family Life Labs
  - Music rooms
  - Science Labs
  - Student Stores
- Optimum design capacity for middle schools is 825 students and 1,500 students for high schools.
- Actual capacity of individual schools may vary depending on the educational programs offered and/or housed at a particular school.

## Minimum Levels of Service

RCW 36.70A.020 requires that public facilities and services necessary to support new housing developments shall be adequate to serve the development at the time the development is available for occupancy and use without decreasing current service levels below locally established minimum standards. These “minimum levels of service” in the Everett School District are established as an average class size no larger than the following:

- **Class Size Goals**
  - 25 Kindergarten
  - 27 General Education - Grades 1-5
  - 31 General Education - Grades 6-8
  - 35 General Education - Grades 9-12
  
- **2013 Actual Class Size Average** - *based on the October 1, 2013 count of student enrollment*
  - 22.8 Kindergarten
  - 25.7 General Education - Grades 1-5
  - 24.4 General Education - Grades 6-8
  - 26.2 General Education - Grades 9-12

## School Boundary Changes

The Everett School District recognizes that school boundaries need to be modified occasionally to respond to changes in student enrollment or educational programs. Boundary changes can be an effective method of reducing the need for new school construction, and are also necessary when new schools or classroom additions are built. A good example of changing school boundaries to reduce the need for new schools occurred in the fall of 2008 when the district re-configured the middle school boundaries in response to significant enrollment growth at Gateway Middle School in the southern end of the district.

Boundary changes, however, can be disruptive to the educational program and to the lives of students and their parents. Therefore, careful consideration of the following should be given before implementing any boundary change:

- The potential negative and positive impacts of any proposed boundary changes should be carefully evaluated.
- Boundary changes should be implemented only after appropriate discussions with affected parties and careful consideration of alternative solutions.
- Boundary changes should be made in the context of long term solutions. Short term solutions that do not address long term issues should be avoided.
- Natural or manmade barriers to safe and efficient transportation routes should be taken into consideration. This applies to pedestrian as well as vehicular transportation.
- It is important, especially at the elementary school level, to ensure students are able to attend schools located within close proximity to their own neighborhood, and, if possible, all students living in a neighborhood should attend the same schools.

### **Future Trends in Programs, with Potential Impacts on district facilities**

- STEM (Science, Technology, Engineering, and Math) – Programs integrating science, technology, engineering, and mathematics; including career and technical education, manufacturing, and biomechanics
- Early learning programs from birth to third grade
- Post high school support opportunities
- Support for strategic partners whose work is aligned with the district’s student learning mission
- Centralized storage and staging facilities for assessment, curriculum and textbooks, and science program kits
- Music programs such as orchestra
- Cost effective solutions for serving high need students that are currently outsourced, such as the NW Regional Learning Center

### **Full-Day Kindergarten**

RCW 28A.150.220 and RCW 28A.150.315 mandates a statewide implementation of full-day kindergarten by the 2017-18 school year. Currently the district has 32 half-day kindergarten sections and 39 full-day sections. Six schools (Emerson, Garfield, Hawthorne, Jackson, Lowell, and Madison) have state funded full-day kindergarten, together they offer 23 sections. This year’s kindergarten program is housed in 59 classrooms. If full-day kindergarten were to be implemented district-wide in the fall 2014, it would expand the number of classrooms needed to house the full-day kindergarten program to 71 and would require the use of an additional 12 classrooms or portables. The district began to implement full-day kindergarten during the 2013-14 school year with the schools which had the highest percentage of low-income students.

The implementation of full-day kindergarten is dependent upon adequate funding for the ongoing costs of providing additional teachers and staff, as well as funding to support the costs of constructing new classrooms facilities. As of April 2014, the state has not funded all of these costs. Therefore, district-wide implementation of full-day kindergarten has not been included in this Capital Facilities Plan update. The district will reconsider including this program’s implementation in future updates.

### **Grades K-3 Class Size Reduction**

Substitute House Bill (SHB) 2776 was passed during the 2010 Legislative Session, and expands on or updates items that were introduced in Engrossed Substitute House Bill (ESHB) 2261 (passed during the 2009 Legislative Session). Among the items included in SHB 2776 is a new formula for the allocation of general apportionment moneys to school districts. SHB 2776 includes an enhancement to reduce the average class size for grades K-3 to 17.0 students per classroom teacher by the 2017-18 school year. This reduction is to begin in the 2011-13 biennium, beginning with the schools with the highest percentage of low-income students, and to continue until the goal is reached by the 2017-18 school year. For the 2014-15 school year the district will receive funding for six additional staff to be used at the K-1 level to reduce the student per classroom teacher ratio.

To fully implement K-3 class size reduction would require a minimum of 80 additional classroom spaces. The actual impact will depend on a variety of factors, including how OSPI interprets the term “classroom teacher”

The implementation of K-3 class size reduction is dependent upon adequate funding for the ongoing costs of providing additional teachers and staff, as well as funding to support the costs of constructing new classrooms facilities. As of April 2014, the state has not funded all of these costs. Therefore, district-wide implementation of K-3 class size reduction has not been included in this Capital Facilities Plan update. The district will reconsider including this program's implementation in future updates.

### **District Strategic Plan**

On June 10, 2014 the school board approved the Annual Strategic Plan Update for 2014-2015 which provides the strategic direction for all district activities including the Capital Facilities Plan. The mission, vision, core values and strategic priorities in the strategic plan are as follows:

#### **Mission Statement**

- Inspire, educate, and prepare each student to achieve to high standards, contribute to our community, and thrive in a global society.

#### **Vision Statement**

- Our students will lead and shape the future.

They will be well-rounded, healthy, and flexible thinkers with a global perspective who can access resources and collaborate. They will demonstrate empathy, pride, and advocacy for self, school, and community while respecting the diversity and worth of others. They will acquire the knowledge, attitudes and skills to adapt to the emerging needs of a changing world.

#### **Core Values**

- Our core values drive our actions and behavior.

Learning	We believe each student has the ability to learn and achieve to high standards.
Equity	We honor and support each student's right to learn and achieve.
Integrity	We act in good faith, serving others with honesty and dignity. We serve as steward of the public trust.
Passion	We are passionate about teaching and learning.
Respect	We value differences among people and treat one another with respect.
Diversity	We embrace diversity as an essential asset; we are inclusive and treat our differences as a core strength.
Collaboration	We believe in learning and working together, the value of diverse views, and the power of collective wisdom.

#### **Strategic Priorities**

- Teaching and Learning - Align curriculum, instruction, and assessment to educate, inspire, and prepare each student to graduate, to contribute to our community, and thrive in a global society.
- Inspiration, Innovation, and Information - Foster innovation to serve current and future needs of diverse learners; support innovative approaches to develop, identify, and use information and technology.
- People, Structure, and Systems - Develop people, structures, and systems to support student learning in a culture of mutual respect and intellectual engagement.

- Resource Management - Generate, align, and coordinate all available resources to serve the best interests of the students. Develop flexibility and adaptability to achieve our mission in a changing economic environment.
- Strategic Relationships - Develop intentional partnerships and strategic relationships to support student learning.

*Section 4*

*Capital Facilities Inventory*

## **SECTION 4: CAPITAL FACILITIES INVENTORY**

Under the GMA, cities and counties are required to inventory capital facilities used to serve existing development. The purpose of the following facilities inventory is to establish a baseline for determining what facilities will be required to address existing deficiencies and accommodate future demand (student enrollment) at acceptable or established levels of service. This section provides an inventory of capital facilities owned and operated by the Everett School District including schools, 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 Section 3). A map showing locations of district school facilities is provided in Figure 1 on page 1-4.

### **Schools**

Everett School District elementary schools include grades K-5, middle schools grades 6-8, and high schools grades 9-12.

OSPI calculates school capacity by dividing gross square footage of a building by a standard square footage per student<sup>3</sup>. This method is used by the state as a simple and uniform approach for determining school capacity for purposes of allocating available state funding assistance to school districts for school construction. However, this method is not considered an accurate reflection of the capacity required to accommodate the adopted educational program of each individual district.

For this CFP, capacity is based on the number of teaching stations within each building and the space requirements of the educational program. The school inventory is summarized in Table 1.

### **Portables**

Portables are used as interim classroom space to house students until permanent classroom facilities can be provided and to prevent overbuilding. Portables are not a solution for housing students on a permanent basis. The number of portables and their capacities are summarized in Table 2. For this Capital Facilities Plan, costs of portable relocations have not been included in the formula for determining developer impact fees.

### **Support Facilities**

In addition to schools, the Everett School District owns and operates additional facilities which provide operational support functions to the schools. An inventory of these facilities is provided in Table 3.

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<sup>3</sup> 90 sq. ft. per kindergarten through sixth grade student, 117 sq. ft. per grade seven and grade eight student, 130 sq. ft. per grade nine through grade twelve student, and 144 sq. ft. per disabled student. (WAC 392-343-035)



## Land

The Everett School District owns the following additional sites not currently used for school purposes:

- 36th & Norton: 3.25 acres - Currently used as a neighborhood playfield.
- Approximately 9.81 acres adjacent to Jefferson Elementary School
- Northwest corner of 35th Street & Grand Avenue, 1.5 acres - This site is presently leased on a long-term basis to the City of Everett for a small neighborhood park.
- 18.9 acres located at the southeast corner of Seattle Hill Road and State Route 527 (Bothell Everett Highway)
- 29.1 acres on the North side of 180th Street SE, between 43rd Ave SE and 46th Ave SE

**Table 1  
School Inventory**

Capacity numbers are in FTE

Elementary School	Site Size (acres)	Bldg. Area (Sq. Ft.) (4)	General Education						Special Education						Other (note 1)	Total School Capacity (FTE)				
			Basic Ed. (Gr. 1-5)		1/2 Day Kindergarten		Full Day Kindergarten		Developmental Pre-school		Developmental Kindergarten		Positive Behavior Support				Extended Resource		Life Skills	
			Classrms	Capacity (X24)	Classrms	Capacity (X22)	Classrms	Capacity (X11)	Classrms	Capacity (X10)	Classrms	Capacity (X10)	Classrms	Capacity (X10)			Classrms	Capacity (X15)	Classrms	Capacity (X10)
Cedar Wood	14.40	55,454	19	456	2	44	2	22	1	10	0	0	0	0	0	0	0	2	532	
Emerson	8.05	52,796	18	432	0	0	5	55	1	10	0	0	0	0	0	0	0	3	497	
Forest View	15.30	66,629	20	480	1	22	2	22	0	0	0	0	0	0	1	15	1	10	3	549
Garfield	5.60	52,699	15	360	0	0	3	33	0	0	0	0	0	0	1	15	0	0	5	408
Hawthorne	8.84	72,395	19	456	0	0	4	44	2	20	0	0	0	0	0	0	0	0	3	520
Jackson	5.16	51,652	11	264	0	0	3	33	0	0	1	10	2	20	0	0	0	0	2	327
Jefferson	18.81 (2)	55,154	16	384	3	66	0	0	0	0	0	0	1	10	1	15	1	10	2	485
Lowell	9.34	58,690	14	336	0	0	4	44	2	20	0	0	0	0	0	0	0	0	4	400
Madison	9.64	58,063	16	384	0	0	3	33	0	0	0	0	0	0	2	30	1	10	4	457
Mill Creek	9.69	55,646	19	456	2	44	2	22	0	0	0	0	0	0	1	15	0	0	2	537
Monroe	9.15	64,930	20	480	2	44	1	11	1	10	1	10	0	0	0	0	0	0	3	555
Penny Creek	13.90	64,882	24	576	2	44	2	22	0	0	0	0	1	10	0	0	0	0	3	652
Silver Firs	12.02	55,839	18	432	1	22	2	22	2	20	0	0	0	0	0	0	0	0	3	496
Silver Lake	11.09	56,774	17	408	2	44	1	11	0	0	0	0	1	10	1	15	0	0	2	488
View Ridge	9.47	64,376	22	528	1	22	1	11	0	0	0	0	0	0	0	0	1	10	4	571
Whittier	5.20	54,084	14	336	1	22	2	22	0	0	0	0	0	0	0	0	1	10	4	390
Woodside	10.84	53,395	18	432	3	66	2	22	0	0	0	0	0	0	0	0	0	0	1	520
<b>Totals:</b>	<b>176.50</b>	<b>993,458</b>	<b>300</b>	<b>7200</b>	<b>20</b>	<b>440</b>	<b>39</b>	<b>429</b>	<b>9</b>	<b>90</b>	<b>2</b>	<b>20</b>	<b>5</b>	<b>50</b>	<b>7</b>	<b>105</b>	<b>5</b>	<b>50</b>	<b>50</b>	<b>8384</b>

Middle School	Site Size (acres)	Bldg. Area (Sq. Ft.) (4)	General Education				Special Education						Other (note 1)	Total School Capacity (FTE)		
			Basic Ed. (Gr. 6-8)		Resource		Positive Behavior Support		Extended Resource		Life Skills				English Language Learner	
			Classrms	Capacity (X24.3)	Classrms	Capacity (X24.3)	Classrms	Capacity (X10)	Classrms	Capacity (X15)	Classrms	Capacity (X10)			Classrms	Capacity (X18)
Eisenhower	19.67	107,252	33	802	2	49	1	10	1	15	0	0	0	0	2	876
Evergreen	21.74	116,526	40	972	2	49	1	10	0	0	2	20	0	0	2	1051
Gateway	43.70	110,181	37	899	2	49	0	0	0	0	0	0	0	0	2	948
Heatherwood	29.21	117,051	31	753	2	49	1	10	1	15	0	0	0	0	2	827
North	10.66	100,860	38	923	2	49	0	0	2	30	0	0	1	18	2	1020
<b>Totals:</b>	<b>124.98</b>	<b>551,870</b>	<b>179</b>	<b>4350</b>	<b>10</b>	<b>243</b>	<b>3</b>	<b>30</b>	<b>4</b>	<b>60</b>	<b>2</b>	<b>20</b>	<b>1</b>	<b>18</b>	<b>10</b>	<b>4722</b>

High School	Site Size (acres)	Bldg. Area (Sq. Ft.) (4)	General Education				Special Education						Other (note 1)	Total School Capacity (FTE)				
			Basic Ed. (Gr. 9-12)		Resource		Positive Behavior Support		Extended Resource		Life Skills				GOAL / STRIVE			
			Classrms	Capacity (X24)	Classrms	Capacity (X24)	Classrms	Capacity (X15)	Classrms	Capacity (X15)	Classrms	Capacity (X10)			Classrms	Capacity (X15)		
Cascade	38.85	244,345	71	1704	3	72	2	30	1	15	1	10	0	0	1	18	3	1849
Everett	11.12	280,459	72	1728	3	72	2	30	2	30	1	10	1	15	2	36	3	1921
Jackson	42.79	247,043	71	1704	1	24	1	15	1	15	1	10	1	15	0	0	3	1783
Sequoia	3.02 (3)	67,007	18	432	1	24	0	0	0	0	0	0	0	0	0	0	2	456
<b>Totals:</b>	<b>95.78</b>	<b>838,854</b>	<b>232</b>	<b>5568</b>	<b>8</b>	<b>192</b>	<b>5</b>	<b>75</b>	<b>4</b>	<b>60</b>	<b>3</b>	<b>30</b>	<b>2</b>	<b>30</b>	<b>3</b>	<b>54</b>	<b>11</b>	<b>6009</b>

**Notes:**

1. Other classrooms not providing capacity: i.e. computer labs, reading rooms, elementary music rooms, ECEAP, LAP, and resource rooms.
2. Jefferson ES site excludes adjacent undeveloped site of 9.87 acres.
3. Sequoia HS excludes 2 nearby sites - 2.96 acre playground at 36th Street and Norton Avenue and 1.38 acre park at the NW corner of 35th Street and Grand Avenue.
4. Building areas do not include covered play areas.
5. Program locations and capacities are projected as of Fall 2014 and as determined by Section 3: Educational Program Standards.

397.26 2,384,182

Table 2  
Portable Inventory

Capacity numbers are in FTE

Elementary School	General Education						Special Education								Other (note 1)	Total School Capacity (FTE)		
	Basic Ed. (Gr. 1-5)		1/2 Day Kindergarten		Full Day Kindergarten		Developmental Pre-school		Developmental Kindergarten		Positive Behavior Support		Extended Resource				Life Skills	
	Classrms	Capacity (X24)	Classrms	Capacity (X22)	Classrms	Capacity (X11)	Classrms	Capacity (X10)	Classrms	Capacity (X10)	Classrms	Capacity (X10)	Classrms	Capacity (X15)			Classrms	Capacity (X10)
Cedar Wood	6	144	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	144
Emerson	4	96	0	0	0	0	0	0	0	0	0	0	0	0	0	0	1	96
Forest View	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
Garfield	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
Hawthorne	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	1	0
Jackson	2	48	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	48
Jefferson	1	24	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	24
Lowell	2	48	0	0	0	0	0	0	0	0	0	0	0	0	0	0	2	48
Madison	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
Mill Creek	5	120	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	120
Monroe	2	48	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	48
Penny Creek	6	144	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	144
Silver Firs	2	48	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	48
Silver Lake	1	24	0	0	0	0	0	0	0	0	0	0	0	0	0	0	1	24
View Ridge	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
Whittier	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
Woodside	8	192	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	192
<b>Totals:</b>	<b>39</b>	<b>936</b>	<b>0</b>	<b>0</b>	<b>0</b>	<b>0</b>	<b>0</b>	<b>0</b>	<b>0</b>	<b>0</b>	<b>0</b>	<b>0</b>	<b>0</b>	<b>0</b>	<b>0</b>	<b>0</b>	<b>5</b>	<b>936</b>

Middle School	General Education				Special Education						Other (note 1)	Total School Capacity (FTE)		
	Basic Ed. (Gr. 6-8)		Resource		Positive Behavior Support		Extended Resource		Life Skills				English Language Learner	
	Classrms	Capacity (X24.3)	Classrms	Capacity (X24.3)	Classrms	Capacity (X10)	Classrms	Capacity (X15)	Classrms	Capacity (X10)			Classrms	Capacity (X18)
Eisenhower	5	122	0	0	0	0	0	0	0	0	0	0	122	
Evergreen	5	122	0	0	0	0	0	0	0	0	1	18	140	
Gateway	5	122	0	0	0	0	0	0	0	0	0	0	122	
Heatherwood	10	243	0	0	0	0	0	0	0	0	0	0	243	
North	1	24	0	0	0	0	0	0	0	0	0	0	24	
<b>Totals:</b>	<b>26</b>	<b>632</b>	<b>0</b>	<b>0</b>	<b>0</b>	<b>0</b>	<b>0</b>	<b>0</b>	<b>0</b>	<b>0</b>	<b>1</b>	<b>18</b>	<b>651</b>	

High School	General Education				Special Education						English Language Learner	Other (note 1)	Total School Capacity (FTE)			
	Basic Ed. (Gr. 9-12)		Resource		Positive Behavior Support		Extended Resource		Life Skills					GOAL / STRIVE		
	Classrms	Capacity (X24)	Classrms	Capacity (X24)	Classrms	Capacity (X15)	Classrms	Capacity (X15)	Classrms	Capacity (X10)				Classrms	Capacity (X15)	
Cascade	0	0	0	0	0	0	0	0	0	0	1	15	0	0	1	15
Everett	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
Jackson	8	192	0	0	0	0	0	0	0	0	0	0	0	0	0	192
Sequoia	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
<b>Totals:</b>	<b>8</b>	<b>192</b>	<b>0</b>	<b>0</b>	<b>0</b>	<b>0</b>	<b>0</b>	<b>0</b>	<b>0</b>	<b>0</b>	<b>1</b>	<b>15</b>	<b>0</b>	<b>0</b>	<b>1</b>	<b>207</b>

Other Portables	Classrms	Capacity (X24)
Stored <sup>(2)</sup>	2	48
<b>Totals:</b>	<b>2</b>	<b>48</b>

- Notes:
1. Other classrooms not providing capacity: i.e. computer labs, reading rooms, elementary music rooms, ECEAP, LAP, and resource rooms.
  2. Portables used during construction projects. They are staged to be moved where needed for enrollment increases or program changes.
  3. Program locations and capacities are projected as of Fall 2014 and as determined by Section 3: Educational Program Standards.

**Table 3**  
**Support Facility Inventory**

Support Facility	Site Size (acres)	Building Area (Sq. Ft.)
Maintenance Facility	1.5	29,080
Vehicle Repair Building	-	7,851
Maintenance Storage Building	0.4	10,594
North Satellite Bus & Storage Facility	2.42	12,600
Central Bus Facility	5.25	24,102
Community Resource Center <sup>(1)</sup>	3.6	68,531
Longfellow Building & Annex	2.34	32,200
Educational Service Center <sup>(2)</sup>	8.04	13,550
Lively Environmental Center	19.45	3,885
Memorial Stadium	22.79	-
Athletics Building	-	11,925
FB Press Box	-	1,602
Baseball Facility	-	7,625
Batting Cage/Storage	-	2,800
Other Buildings	-	5,639
<b>Totals:</b>	<b>65.79</b>	<b>231,984</b>

**Notes:**

1. Building area does not include unheated garage space (18,409 sq. ft.)
2. Building area does not include portable structure (2,770 sq. ft.)

*Section 5*

*Student Enrollment*

## **SECTION 5 - STUDENT ENROLLMENT**

### **Historical and Current Enrollment Trends**

Student enrollment in the Everett School District was relatively constant between 1973 and 1983. From 1983 to 2001 enrollment increased steadily due to a healthy local economy and an active housing market, and then gradually decreased from 2002 to 2004 due to slowing economic conditions. Fueled by historically low interest rates and another active housing market in the Mill Creek East UGA Plan area, district enrollment rose again from 2005 to 2009. Beginning in 2010 the district's enrollment declined each year through 2012. In 2013 the enrollment rebounded back to the 2009 levels. Enrollment is projected to continue to increase, each year, through 2019. Enrollment projections from 2019 to 2035 are linked directly to OFM population forecasts, and are expected to show a steady increase as well.

### **2014-2019 Enrollment Projections**

This CFP has been prepared using an OSPI enrollment projection from 2014 through 2019. This enrollment projection method was chosen because it uses an historical cohort-survival analysis that has historically produced relatively accurate results. This method tracks enrollment each year at each grade span as students move through the K-12 system, and projects enrollment based on actual enrollment changes over the previous six years. The OSPI methodology is described in more detail in Appendix C. OSPI enrollment projections are presented in Tables 4, 5 and 6, and OFM - Ratio enrollment projections are presented in Tables 5 and 7. Please note that all enrollment figures shown in this CFP are FTE as of October 1 of the year indicated.

Table 5 also contains enrollment forecasts from two other sources for comparison purposes: A grade progression (cohort survival analysis) projection prepared by Kendrick (described in more detail in Appendix E) and an OFM Ratio projection prepared by Shockey Planning Group. The OFM Ratio method (described in more detail in Appendix D) is based on a percentage of the District's population as predicted by OFM and Snohomish County.

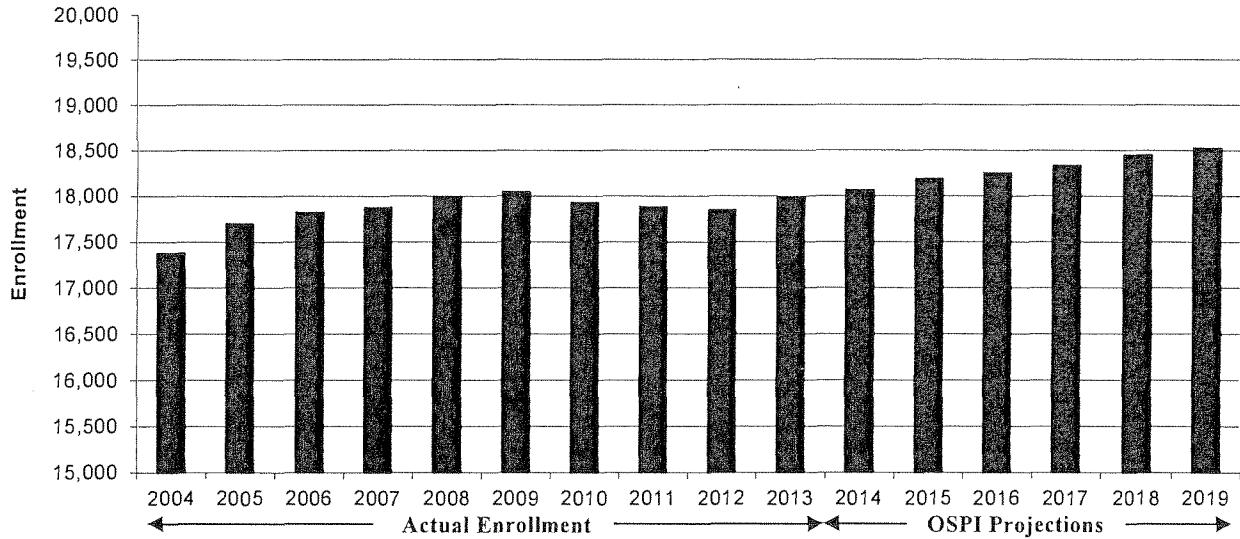
Based on the OSPI enrollment projections, overall District enrollment will increase by 538 students over the next six years, reflecting an increase of approximately 3.0% over 2013 levels. Table 6 provides a breakdown of the OSPI enrollment projections by grade span for every year from 2013 to 2019.

### **2035 Enrollment Projections**

Long-range enrollment projections are, by their nature, much more speculative than short-range projections. Nevertheless, they are useful in developing comprehensive plans for future facilities and sites. Enrollment projections for 2035 are presented in Table 7 using the OFM Ratio method since neither OSPI nor OSPI produce projections that far into the future.

The OFM projections for 2035 indicate that total enrollment in the District will increase to 24,949 FTE, an increase of 38.71% over the 2013 enrollment levels. Enrollment in 2035 is projected to be higher than the 2013 capacities at the elementary, middle, and high school levels. An analysis of future capacities and facilities needs is provided in Section 6.

**Table 4  
Enrollment (FTE) 2004-2019**



**Table 5  
Comparison of Enrollment Projections (FTE) 2013-2019**

	<i>Actual</i>							Projected Total Change	Projected Percent Change
	2013	2014	2015	2016	2017	2018	2019	2013-2019	2013-2019
OSPI	17,986	18,062	18,187	18,250	18,332	18,448	18,524	538	2.99
OFM Ratio	17,986	18,124	18,386	18,613	18,840	19,393	19,945	1,959	10.89
Kendrick	17,986	18,191	18,335	18,436	18,562	18,736	18,838	852	4.74

**Table 6  
OSPI Enrollment Projections (FTE) 2013-2019**

	<i>Actual</i>						
	2013	2014	2015	2016	2017	2018	2019
Elementary School	8,290	8,404	8,398	8,494	8,551	8,602	8,585
Middle School	4,201	4,202	4,257	4,334	4,377	4,342	4,477
High School	5,495	5,456	5,532	5,422	5,404	5,504	5,462
<b>Total:</b>	<b>17,986</b>	<b>18,062</b>	<b>18,187</b>	<b>18,250</b>	<b>18,332</b>	<b>18,448</b>	<b>18,524</b>

**Table 7  
OFM Ratio Enrollment Projections (FTE) 2035**

	2035
Elementary School	11,563
Middle School	6,030
High School	7,356
<b>Total:</b>	<b>24,949</b>

**Table 8**  
**Permanent Facility Capacity Calculations (FTE) 2013-2035**

Elementary School	2013	2014	2015	2016	2017	2018	2019	2035
Enrollment	8290	8404	8398	8494	8551	8602	8585	11563
Capacity Increase Due to Construction Projects		0	0	192	0	565	0	2424
Total Capacity (after construction projects)	8384	8384	8384	8576	8576	9141	9141	11565
Amount of Enrollment Above or Below (-) Capacity		20	14	-82	-25	-539	-556	-2
2014-2019 Elementary School Expansion Ratio*	218 / 757 = 28.80%							

Middle School	2013	2014	2015	2016	2017	2018	2019	2035
Enrollment	4201	4202	4257	4334	4377	4342	4477	6030
Capacity Increase Due to Construction Projects		0	0	0	0	0	0	1312
Total Capacity (after construction projects)	4722	4722	4722	4722	4722	4722	4722	6034
Amount of Enrollment Above or Below (-) Capacity		-520	-465	-388	-345	-380	-245	-4
2014-2019 Middle School Expansion Ratio*	0 / 0 = 0.00% (no new construction is planned)							

High School	2013	2014	2015	2016	2017	2018	2019	2035
Enrollment	5495	5456	5532	5422	5404	5504	5462	7356
Capacity Increase Due to Construction Projects		0	0	0	0	0	0	1500
Total Capacity (after construction projects)	6009	6009	6009	6009	6009	6009	6009	7509
Amount of Enrollment Above or Below (-) Capacity		-553	-477	-587	-605	-505	-547	-153
2014-2019 High School Expansion Ratio*	0 / 0 = 0.00% (no new construction is planned)							

\* Ratio between the needed capacity for growth divided by the capacity increase due to proposed construction projects



*Section 6*

*Capital Facilities Plan*

## SECTION 6 - CAPITAL FACILITIES PLAN

### Facilities Needs 2014-2019

As of 2013, there were no district-wide capacity deficiencies at the elementary, middle, or high school levels. District-wide enrollment is projected to gradually increase each year from 2013 to 2019. During this same six year time period the anticipated enrollment levels will not exceed the 2013 capacities at the middle school and high school levels. The enrollment levels at the elementary school level will exceed the 2013 capacity without new construction. Enrollment and capacity projections are presented together for comparison purposes in Table 8 – *Permanent Facility Capacity Calculations 2013-2035* on page 5-3.

Since most of the undeveloped land suitable for housing development is located in the southern portion of the district it is likely that a disproportionate amount of the anticipated enrollment growth will occur there. This trend could increase the amount of school facilities needed in this area beyond the levels described below. Additionally, due to the impacts, difficulties and high cost of transporting students over long distances, the district believes bussing students long distances from the south end of the district to the north end is not an appropriate method of addressing all of the expected south end growth.

### Planned Improvements Adding Student Capacity

The following is an outline of the projects that add capacity and are considered necessary to accommodate the students forecasted in OSPI enrollment projections in the district through 2019. Timelines for these projects can be found in Table 9 – *Capital Facilities Plan* on page 6-4.

#### Elementary Schools

District-wide elementary school enrollment is projected to reach 8,585 in 2019 as shown in Table 8 on page 5-3, an increase of 295 students from the 2013 enrollment of 8,290. This is 201 more students than the existing 2013 elementary school capacity of 8,384. In response to this increase in enrollment: 1) 4-classroom additions at two schools, with a total capacity of 192 will be built; 2) A new elementary school (Elementary No. 18) with a projected capacity of 565 needs to be constructed. Depending on where the enrollment growth occurs, a potential location for this school is on a parcel of land situated in the southeast portion of the district on 180<sup>th</sup> St. SE, and 3) Portable classrooms will need to be relocated and/or purchased in order to provide sufficient classroom space while avoiding additional construction expense. The total cost is estimated to be approximately \$44,195,000.<sup>4</sup>

#### Middle Schools

District-wide middle school enrollment is projected to increase to its highest level of 4,477 in 2019. The existing 2013 middle school capacity of 4,722 will be adequate to accommodate the anticipated enrollment. To provide for enrollment increases at individual schools, portable classrooms will be brought in to provide sufficient classroom space, while avoiding additional construction expense. The total cost is estimated to be approximately \$600,000.<sup>4</sup> No other projects adding capacity are planned through 2019.

#### High Schools

District-wide high school enrollment is projected to vary over this time frame and will remain relatively stable through 2019 (Note: Kendrick's projections indicate an increase in enrollment over this same time period.) Enrollment will reach its highest level of 5,535 in 2015. The existing 2013 high school capacity of 6,009 will be able to accommodate the anticipated enrollment. As enrollment

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<sup>4</sup> Portable relocation costs of are not included in the calculation of the impact fee.

increases at individual schools, portable classrooms will need to be brought in to provide sufficient classroom space while avoiding additional construction expense. The total cost is estimated to be approximately \$1,815,000.<sup>5</sup> No other projects adding capacity are planned through 2019.

#### Future School Site Property

In 2008 the district purchased property on 180<sup>th</sup> St. SE, from a developer, as a future site for two schools. As part of the purchase and sale agreement, the district issued the developer Mitigation Fee credits toward future impact fees for \$4,660,000. The developer can use the certificates in lieu of paying impact fees. This practice will continue until the current credit balance of \$3,565,781 is retired.

### **Planned Improvements Not Adding Student Capacity**

The following is an outline of the projects that do not add capacity, but are considered necessary to accommodate and support the educational program in the district through 2019. Timelines for these projects can be found in Table 9 – *Capital Facilities Plan*.

#### Elementary Schools

- Modernization & partial replacement of Woodside Elementary School
- Total cost is estimated to be approximately \$22,119,000

#### Middle Schools

- Modernization & partial replacement of North Middle School
- Total cost is estimated to be approximately \$41,199,000

#### High Schools

- Modernization of the Gymnasium / Athletics building at Everett High School
- Turf replacements at Cascade High School and HM Jackson High School
- Total cost is estimated to be approximately \$6,480,000

#### Other School Projects

- District-wide upgrades to heating, ventilation and air conditioning systems, exterior and interior finishes, technology upgrades, and other miscellaneous systems upgrades.
- The total cost is estimated to be approximately \$26,019,000.

#### Other Projects

- Completion of the Community Resource Center.
- The total cost is estimated to be approximately \$2,500,000.

### **Facilities Needs 2020-2035**

#### **Planned Improvements**

In order to house the district wide OFM projected enrollments from 2020 to 2035, as shown on page 5-3, Table 8 – *Permanent Facility Capacity Calculations 2013-2035*, the district would need to construct classroom additions at various sites throughout the district. We would need to plan for a minimum of 101 additional classrooms, at the elementary level, with a total capacity of 2,424 FTE. In addition, we need to construct additional building area (square footage) equivalent to: 54 classrooms at middle school, with a total capacity of 1,312 FTE, and 54 classrooms at the high school, with capacity for 1,512 FTE. To prepare for this and future growth, the district will need to, depending on where the enrollment growth occurs, purchase additional sites for new elementary schools.

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<sup>5</sup> Portable relocation costs are not included in the calculations of the impact fee.

**Table 9  
Capital Facilities Plan**

	Estimated Project Cost by Year - in \$ Millions						Total Cost	Secured Bond/Levy <sup>1</sup>	Secured Other <sup>2</sup>	Unsecured Other <sup>3</sup>
	2014	2015	2016	2017	2018	2019				
<b>Improvements Adding Student Capacity</b>										
<b>Elementary School</b>										
4-Classroom Addition @ 2 sites		\$0.154	\$1.842	\$2.148			\$4.144			\$4.144
New Elementary #18			\$1.363	\$16.323	\$19.045		\$36.731			\$36.731
Portable Relocations / Purchase <sup>4</sup>	\$0.420	\$0.700	\$0.700	\$0.700	\$0.400	\$0.400	\$3.320		\$2.052	\$1.268
<b>Middle School</b>										
Portable Relocations / Purchase <sup>4</sup>					\$0.300	\$0.300	\$0.600			\$0.600
<b>High School</b>										
Portable Relocations / Purchase <sup>4</sup>	\$0.315	\$0.300	\$0.300	\$0.300	\$0.300	\$0.300	\$1.815		\$1.548	\$0.267
<b>Subtotal</b>	<b>\$0.735</b>	<b>\$1.154</b>	<b>\$4.205</b>	<b>\$19.471</b>	<b>\$20.045</b>	<b>\$1.000</b>	<b>\$46.610</b>		<b>\$3.600</b>	<b>\$43.010</b>
<b>Property Adding Student Capacity</b>										
180th Street SE Property <sup>4</sup>	\$0.300	\$0.300	\$0.300	\$0.300	\$0.300	\$0.300	\$1.800		\$1.800	
<b>Subtotal</b>	<b>\$0.300</b>	<b>\$0.300</b>	<b>\$0.300</b>	<b>\$0.300</b>	<b>\$0.300</b>	<b>\$0.300</b>	<b>\$1.800</b>		<b>\$1.800</b>	
<b>Improvements Not Adding Student Capacity</b>										
Community Resource Center (CRC)	\$2.400	\$0.100					\$2.500		\$2.500	
Modernization of EHS Gymnasium	\$2.200						\$2.200	\$2.200		
Turf Replacement Project-CHS & JHS			\$4.280				\$4.280		\$0.416	\$3.864
Modernization + partial replacement of Woodside ES		\$0.200	\$0.200	\$4.687	\$9.954	\$7.078	\$22.119			\$22.119
Modernization + partial replacement of North MS		\$0.200	\$0.200	\$9.076	\$18.539	\$13.184	\$41.199			\$41.199
Upgrade HVAC/Exterior and Interior Finishes/Floor Systems	\$0.951	\$1.779	\$2.000	\$1.270			\$6.000	\$6.000		
District-Wide Technology Upgrades	\$5.370	\$4.940	\$3.900	\$3.300	\$1.250	\$1.259	\$20.019	\$18.800	\$1.219	
<b>Subtotal</b>	<b>\$10.921</b>	<b>\$7.219</b>	<b>\$10.580</b>	<b>\$18.333</b>	<b>\$29.743</b>	<b>\$21.521</b>	<b>\$98.317</b>	<b>\$27.000</b>	<b>\$4.135</b>	<b>\$67.182</b>
<b>Total</b>	<b>\$11.956</b>	<b>\$8.673</b>	<b>\$15.085</b>	<b>\$38.104</b>	<b>\$50.088</b>	<b>\$22.821</b>	<b>\$146.727</b>	<b>\$27.000</b>	<b>\$9.535</b>	<b>\$110.192</b>

Source: Everett School District

1. Secured Bond/Levy- Bond and levy funding already approved by voters.

2. Secured Other - Funds currently available to the District including proceeds from property sales, school mitigation and impact fees, state match funds remaining from prior construction projects, and impact fee credits for the 2006 30-acre property purchase on 180th St SE.

3. Unsecured future - School mitigation and impact fees not yet collected, bonds and levies not yet approved.

4. Costs are not included in the calculations of the impact fees.

## CAPITAL FACILITIES FINANCING PLAN

### Six Year Finance Plan

The *Capital Facilities Plan* (Table 9) demonstrates how the Everett School District intends to fund new construction and improvements to school facilities for the years 2014 through 2019. The financing components include secured funding from capital projects bonds and levies, secured funding from other sources (proceeds from property sales, school mitigation fees, school impact fees, and state financing assistance funds remaining from prior construction projects) and unsecured future funding sources (bonds, levies, and school mitigation / impact fees). The financing plan also 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.

### Funding for the Plan

#### 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 Everett School District passed capital improvements bonds for \$96.5 million in 1990, \$68.5 million in 1996, \$74.0 million in 2002 and 198.9 million in 2006. Several major projects have been financed by these bonds.

#### Capital Levies

Voters in the Everett School District passed a Building Repair and Technology levy in 2010 authorizing the district to collect \$48,000,000 from property taxes over six years for capital improvements to facilities and technology.

#### State Financing Assistance

State financing assistance comes 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 funds or the State Board of Education can establish a moratorium on certain projects.

School districts may qualify for state financing assistance for a specific capital project. To qualify, a project must first meet a state-established criterion of need. This is determined by a formula that specifies the amount of square footage the state will help finance to house the enrollment projected for the district. If a project qualifies, it can become part of a state prioritization system. This system prioritizes allocation of available funding resources to school districts statewide based on seven 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 percent of the total project cost to be paid by the state for eligible projects. The state contribution for eligible projects can range from less than half to more than 70% of the project's cost.<sup>6</sup>

State financing assistance can be applied only to major school construction projects. Site acquisition and minor improvements are not eligible to receive financing assistance from the state. Because availability of state financing assistance has not kept pace with the rapid enrollment growth occurring in many of Washington's school districts, sometimes financing assistance from the state

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<sup>6</sup> Paying for Growth's Impacts - A Guide To Impact Fees, State of Washington Department of Community Development Growth Management Division, January 1992, Pg. 30.

may not be received by a school district until 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). When the state share is finally disbursed (without accounting for escalation) the future district project is partially reimbursed.

The state has determined that the Everett School District has excess student capacity. Therefore, the district is not currently eligible for state financing assistance on projects that provide increased student capacity. The district is eligible for state financing assistance for modernization projects.

### School 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. Impact fees for the Everett School District are calculated on worksheets contained in Appendix A and are summarized in Table 11 on page 6-8.

Impact fees have been calculated utilizing the formula in Chapter 30.66C SCC. 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 or relocate temporary facilities (portables). Credits have also been applied in the formula to account for state financing assistance to be reimbursed to the district (none anticipated for the Everett School District for facilities needed to serve new growth.) and projected future property taxes to be paid by the owner of a dwelling unit. The costs of projects that *do not* add capacity or which only address existing deficiencies have been eliminated from the variables used in the calculations as indicated in Table 12 – *Impact Fee Variables* on page 6-9.

### Exclusion of Costs to Correct Existing Deficiencies

#### 2014-2019 Costs

By ordinance, new development cannot be assessed impact fees to correct existing deficiencies. For this CFP update, the base year for determining existing deficiencies is 2013. Thus, capacity deficiencies existing in 2013 must be deducted from the total projected deficiencies in the calculation of impact fees. This is accomplished in Table 8 (page 5-3) for school construction costs by calculating a 2013-2019 Expansion Ratio percentage of new students to new capacity for each grade span. This Expansion Ratio is then used to modify (reduce) certain variables included in the calculation of the School Construction Cost Element, which are shown on the lines labeled "Growth Related (2013-2019)" in Table 12. For example: The total cost of a 4-room additions at two schools and new elementary school in Table 12 (\$40,875,000)<sup>7</sup> was multiplied by the Elementary Expansion Ratio from Table 8 (28.80%) to obtain the "Growth Related (2013-2019)" school construction cost in Table 12 (\$11,748,098) used in the impact fee calculations (Appendix A).

### Projects Included in the Calculation of Impact Fees

The calculations of school impact fees in this Capital Facilities Plan are based on the following projects which address future growth-related needs for elementary school facilities in the south end of the district:

2014-2019 Needs:	4-Classroom Additions at two schools	-	\$4,144,000
	One New Elementary School	-	\$36,731,000

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<sup>7</sup> Portable relocation costs are not included in the calculation of the impact fees.

### Projects *Not* Included in the Calculation of Impact Fees

The following projects deal primarily with existing deficiencies or do not add capacity, and are not included in the calculation of impact fees:

- Modernization & partial replacement of Woodside Elementary School
- Modernization & partial replacement of North Middle School
- Modernization of gymnasium building @ Everett High School
- Portable relocations
- Turf replacements at Cascade High School and HM Jackson High School
- Heating, ventilation and air conditioning Systems upgrades
- Exterior and interior finishes upgrades
- Flooring upgrades
- District-wide technology upgrades
- Miscellaneous upgrades - district-wide

### Property *Not* Included in the Calculation of Impact Fees

- Property on 180<sup>th</sup> St. SE for future schools

### The proposed locations and capacities of new or expanded capital facilities are:

- New elementary school No. 18: Possible location is the 180th Street SE site – South end of the district (Capacity 565 FTE)
- 4-classroom additions at two sites: Final locations - yet to be determined (Capacity 192 FTE)
- Portable relocations: Various sites throughout the district. (Capacity 24 FTE each)

**Calculation Criteria** (See Table 12 – *Impact Fee Variables* – page 6-9)

### Site Acquisition Cost Element

Site Size: The site size gives the optimum acreage for each school type based on studies of existing school sites. Generally, districts will require 11-15 acres for an elementary school; 25-30 acres for a middle school or junior high school; and 40 acres or more for a high school. Actual school sites may vary in size depending on the size of parcels available for sale and other site development constraints such as wetlands. It also varies based on the need for athletic fields adjacent to the school, along with other specific planning factors.

Average Land Cost per Acre: The cost per acre is based on estimates of land costs within the district, based on recent land purchases and prevailing costs in the particular real estate market. Prices per acre will vary throughout the county and will be heavily influenced by the urban vs. rural setting of the specific district and the location of the planned school site. The Everett School District has, in the past, researched and evaluated potential land purchases in the southeast area of the district. This is the most likely area of the district to experience growth in the future, and much of it is included in the recently rezoned Mill Creek East UGA or immediately adjacent areas that could be rezoned as well. Developed sites, which sometimes must be acquired adjacent to existing school sites in order to expand these facilities, can cost substantially more.

Additional Land Capacity: Building capacities reflect the district's optimum number of students each school type is designed to accommodate. These figures are based on design studies of optimum floor area for new school facilities. The district design standards for new schools accommodate the following capacities: elementary schools - 550 to 565 students, middle schools - 825 students, and high schools - 1,500 students.

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 detached dwellings and multiple-family dwellings. Multiple-family dwellings, which may be rental or owner-occupied units within structures containing two or more dwelling units, were broken out into one-bedroom and two-plus bedroom units.

Pursuant to a requirement of Chapter 30.66C SCC, each school district was required to conduct student generation studies within their jurisdictions. This was done to “localize” generation rates for purposes of calculating impact fees. A description of this methodology is contained in Appendix B.

The student generation rates for the Everett School District are discussed in Appendix A and shown on Table 10.

**Table 10  
Student Generation Rates**

Housing Type	K-5	6-8	9-12	K-12
Single Family	.274	.114	.129	.517
Multiple Family, 2+ BR	.078	.025	.042	.145
Multiple Family, 0-1 BR	.000	.000	.000	.000

**School Construction Cost Variables**

Additional Building Capacity: (See description under Additional Land Capacity on page 6-6)

Current Permanent Square Footage: (From Table 1 – School Inventory on page 4-3)

Estimated Facility Construction Cost: The estimated facility construction cost is based on planned costs or on actual costs of recently constructed schools. The facility cost is the total cost for construction projects as defined on Table 9, including only capacity related improvements. Projects or portions of projects that address existing deficiencies, which are those students who are un-housed as of December 31, 2013 are not included in the calculation of facility cost for impact fee calculation.

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 financing assistance. Off-site development costs vary, and can represent 10% or more of the total building construction cost.

**State Financing Assistance Credit Variables**

Construction Cost Allocation (CCA): This number is generated by OSPI as a guide for determining the area cost allocation for new school construction. The CCA is adjusted regularly for inflation. As of July 1, 2013 the CCA been adjusted to \$200.40 per square foot.

State Financing Assistance Percentage: The state financing assistance 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 the district’s 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.



If a project were eligible for state financing assistance, the Everett School District would receive basic project reimbursement on a state financing assistance ratio. However, because the state has determined that the Everett District has excess student capacity according to the state’s formula, the Everett District is not eligible for new construction state financing assistance at this time. Therefore, the effective state financing assistance ratio is zero. If the Everett School District was eligible to receive state financing assistance, the 2014 financing assistance ratio, according to OSPI, would be 55.18%.

**Tax Credit Variables**

Under Chapter 30.66C SCC, a credit is granted to new development to account for property taxes which will be paid to the school district over the next ten years. The credit is calculated using a “present value” formula.

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 assumed interest rate is 4.25%.

Levy Rate (in mils): The capital construction levy rate is determined by dividing the district's average capital property tax rate by one-thousand. The current levy rate for the Everett School District is .00209.

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 average assessed values are 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 \$263,113 for single-family detached residential dwellings; \$77,653 for one-bedroom multi-family units, and \$114,081 for two or more bedroom multi-family units.

Loan Payoff (Years): This is the average amount of time remaining on Capital Projects/General Obligation Bonds issued by the district. The average time remaining on bonds issued by all the Snohomish County school districts is assumed to be 10 years for purposes of calculating this credit.

**Impact Fee Schedule**

**Table 11  
School Impact Fees  
Everett School District**

<b>Housing Type</b>	<b>Impact Fee Per Unit</b>
Single Family	\$4,988
Multiple Family, 0-1 BR	\$0
Multiple Family, 2+ BR *	\$1,092

*\* Includes duplexes and townhomes*

**Table 12**  
**Impact Fee Variables**  
**Everett School District**

Criteria	Elementary	Middle	High
<b>Site Acquisition Cost Element</b>			
Site Size (acres)			
<i>Growth Related (2020-2035)</i>			
Average Land Cost Per Acre			
Total Land Cost			
<i>Growth Related (2020-2035)</i>			
Additional Land Capacity			
<i>Growth Related (2020-2035)</i>			
Student Factor			
Single Family	0.274	0.114	0.129
Multiple Family 1 Bdrm	.000	.000	.000
Multiple Family 2 Bdrm	0.078	0.025	0.042
<b>School Construction Cost Element</b>			
	Elementary school & 4-Room additions @ 2 schools		
Additional Building Capacity	757	0	0
<i>Growth Related (2014-2019)</i>	218	0	0
Current Facility Square Footage	993,458	551,870	838,854
Estimated Facility Construction Cost	\$40,875,000	\$0	\$0
<i>Growth Related (2014-2019)</i>	\$11,771,136	\$0	\$0
<b>State Financing Assistance Credit</b>			
Construction Cost Allotment -- July 2013	\$200.40	\$200.40	\$200.40
School Space per Student (OSPI)	90	117	130
State Financing Assistance Percentage	0.00%	0.00%	0.00%
<b>Tax Payment Credit</b>			
Interest Rate	4.25%	4.25%	4.25%
Loan Payoff (Years)	10	10	10
Levy Rate	0.00209	0.00209	0.00209
Average Assessed Value	\$263,113 (Single Family)	\$77,653 (MF 0-1 bdrm)	\$114,051 (MF 2+ bdrm)
<b>Growth-Related Capacity Percentage</b>			
Permanent Facilities	28.80%	0.00%	0.00%
<b>Discount</b>	50%	50%	50%

*Appendix A*

*Impact Fee Calculations*

IMPACT FEE WORKSHEET  
 EVERETT SCHOOL DISTRICT  
 SINGLE-FAMILY RESIDENTIAL

SITE ACQUISITION COST

acres needed	<u>0.00</u>	x	cost per acre	<u>\$0</u>	/	capacity (# students)	<u>0</u>	x	student factor	<u>0.274</u>	=	<u>\$0</u>	(elementary)
acres needed	<u>0.00</u>	x	cost per acre	<u>\$0</u>	/	capacity (# students)	<u>0</u>	x	student factor	<u>0.114</u>	=	<u>\$0</u>	(middle school)
acres needed	<u>0.00</u>	x	cost per acre	<u>\$0</u>	/	capacity (# students)	<u>0</u>	x	student factor	<u>0.129</u>	=	<u>\$0</u>	(high school)
TOTAL SITE ACQUISITION COST											=	<u>\$0</u>	

SCHOOL CONSTRUCTION COST

total const. cost	<u>\$11,771,136</u>	/	capacity (# students)	<u>218</u>	x	student factor	<u>0.274</u>	=	<u>\$14,795</u>	(elementary)			
total const. cost	<u>\$0</u>	/	capacity (# students)	<u>0</u>	x	student factor	<u>0.114</u>	=	<u>\$0</u>	(middle school)			
total const. cost	<u>\$0</u>	/	capacity (# students)	<u>0</u>	x	student factor	<u>0.129</u>	=	<u>\$0</u>	(high school)			
									Subtotal	<u>\$14,795</u>			
Total Square Feet of Permanent Space (District)	<u>2,384,182</u>	/	Total Square Feet of Relocatable Facilities (Portables)	<u>2,452,658</u>				=	<u>97.21%</u>				
TOTAL FACILITY CONSTRUCTION COST											=	<u>\$14,382</u>	

STATE FINANCING ASSISTANCE CREDIT

BOECKH Index	<u>\$200.40</u>	x	OSPI Allowance	<u>90</u>	x	State Financing Assistance %	<u>0.00%</u>	x	student factor	<u>0.274</u>	=	<u>\$0</u>	(elementary)
BOECKH Index	<u>\$200.40</u>	x	OSPI Allowance	<u>117</u>	x	State Financing Assistance %	<u>0.00%</u>	x	student factor	<u>0.114</u>	=	<u>\$0</u>	(middle school)
BOECKH Index	<u>\$200.40</u>	x	OSPI Allowance	<u>130</u>	x	State Financing Assistance %	<u>0.00%</u>	x	student factor	<u>0.129</u>	=	<u>\$0</u>	(high school)
TOTAL STATE MATCH CREDIT											=	<u>\$0</u>	

TAX PAYMENT CREDIT

(((1+ interest rate	<u>4.25%</u>	) ^	<u>10</u>	years to pay off bond) - 1]	/	[ interest rate	<u>4.25%</u>	x		
(1 + interest rate	<u>4.25%</u>	) ^	<u>10</u>	years to pay off bond ]	x	<u>0.00209</u>	Property tax levy rate	x		
assessed value	<u>\$263,113</u>							=	<u>\$4,405</u>	(tax payment credit)

IMPACT FEE CALCULATION

SITE ACQUISITION COST	<u>\$0</u>
FACILITY CONSTRUCTION COST	<u>\$14,382</u>
RELOCATABLE FACILITIES COST (PORTABLES)	<u>\$0</u>
(LESS STATE FINANCING ASSISTANCE CREDIT)	<u>\$0</u>
(LESS TAX PAYMENT CREDIT)	<u>(\$4,405)</u>
(LESS COUNTY DISCOUNT)	<u>(\$4,988)</u>
(LESS ELECTIVE DISTRICT DISCOUNT)	<u>\$0</u>

<b>FINAL IMPACT FEE PER UNIT</b>	<b><u>\$4,988</u></b>
----------------------------------	-----------------------

IMPACT FEE WORKSHEET  
 EVERETT SCHOOL DISTRICT  
 MULTIPLE FAMILY RESIDENTIAL -- 1 BEDROOM OR LESS

SITE ACQUISITION COST

acres needed	<u>0.00</u>	x	cost per acre	<u>\$0</u>	/	capacity (# students)	<u>0</u>	x	student factor	<u>.000</u>	=	<u>\$0</u>	(elementary)
acres needed	<u>0.00</u>	x	cost per acre	<u>\$0</u>	/	capacity (# students)	<u>0</u>	x	student factor	<u>.000</u>	=	<u>\$0</u>	(middle school)
acres needed	<u>0.00</u>	x	cost per acre	<u>\$0</u>	/	capacity (# students)	<u>0</u>	x	student factor	<u>.000</u>	=	<u>\$0</u>	(high school)
TOTAL SITE ACQUISITION COST											=	<u>\$0</u>	

SCHOOL CONSTRUCTION COST

total const. cost	<u>\$11,771,136</u>	/	capacity (# students)	<u>218</u>	x	student factor	<u>.000</u>	=	<u>\$0</u>	(elementary)			
total const. cost	<u>\$0</u>	/	capacity (# students)	<u>0</u>	x	student factor	<u>.000</u>	=	<u>\$0</u>	(middle school)			
total const. cost	<u>\$0</u>	/	capacity (# students)	<u>0</u>	x	student factor	<u>.000</u>	=	<u>\$0</u>	(high school)			
										Subtotal	=	<u>\$0</u>	
Total Square Feet of Penmanent Space (District)	<u>2,384,182</u>	/ Total Square Feet of School Facilities (Portables)	<u>2,452,658</u>	=	<u>97.21%</u>								
TOTAL FACILITY CONSTRUCTION COST											=	<u>\$0</u>	

STATE FINANCING ASSISTANCE CREDIT

BOECKH Index	<u>\$200.40</u>	x OSPI Allowance	<u>90</u>	x	State Financing Assistance %	<u>0.00%</u>	x	student factor	<u>.000</u>	=	<u>\$0</u>	(elementary)	
BOECKH Index	<u>\$200.40</u>	x OSPI Allowance	<u>117</u>	x	State Financing Assistance %	<u>0.00%</u>	x	student factor	<u>.000</u>	=	<u>\$0</u>	(middle school)	
BOECKH Index	<u>\$200.40</u>	x OSPI Allowance	<u>130</u>	x	State Financing Assistance %	<u>0.00%</u>	x	student factor	<u>.000</u>	=	<u>\$0</u>	(high school)	
TOTAL STATE MATCH CREDIT											=	<u>\$0</u>	

TAX PAYMENT CREDIT

(((1+ interest rate	<u>4.25%</u>	) ^	<u>10</u>	years to pay off bond) - 1] /	[ interest rate	<u>4.25%</u>	x							
(1 + interest rate	<u>4.25%</u>	) ^	<u>10</u>	years to pay off bond ] x	<u>0.00209</u>	Property tax levy rate x								
assessed value	<u>\$77,653</u>											=	<u>\$1,300</u>	(tax payment credit)

IMPACT FEE CALCULATION

SITE ACQUISITION COST	<u>\$0</u>
FACILITY CONSTRUCTION COST	<u>\$0</u>
RELOCATABLE FACILITIES COST (PORTABLES)	<u>\$0</u>
(LESS STATE FINANCING ASSISTANCE CREDIT)	<u>\$0</u>
(LESS TAX PAYMENT CREDIT)	<u>(\$1,300)</u>
(LESS COUNTY DISCOUNT)	<u>\$0</u>
(LESS ELECTIVE DISTRICT DISCOUNT)	<u>\$0</u>

<b>FINAL IMPACT FEE PER UNIT</b>	<u><b>\$0</b></u>
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IMPACT FEE WORKSHEET  
 EVERETT SCHOOL DISTRICT  
 MULTIPLE FAMILY RESIDENTIAL -- 2 BEDROOM OR MORE

SITE ACQUISITION COST

acres needed	<u>0.00</u>	x	cost per acre	<u>\$0</u>	/	capacity (# students)	<u>0</u>	x	student factor	<u>0.078</u>	=	<u>\$0</u>	(elementary)
acres needed	<u>0.00</u>	x	cost per acre	<u>\$0</u>	/	capacity (# students)	<u>0</u>	x	student factor	<u>0.025</u>	=	<u>\$0</u>	(middle school)
acres needed	<u>0.00</u>	x	cost per acre	<u>\$0</u>	/	capacity (# students)	<u>0</u>	x	student factor	<u>0.042</u>	=	<u>\$0</u>	(high school)
TOTAL SITE ACQUISITION COST											=	<u>\$0</u>	

SCHOOL CONSTRUCTION COST

total const. cost	<u>\$11,771,136</u>	/	capacity (# students)	<u>218</u>	x	student factor	<u>0.078</u>	=	<u>\$4,212</u>	(elementary)			
total const. cost	<u>\$0</u>	/	capacity (# students)	<u>0</u>	x	student factor	<u>0.025</u>	=	<u>\$0</u>	(middle school)			
total const. cost	<u>\$0</u>	/	capacity (# students)	<u>0</u>	x	student factor	<u>0.042</u>	=	<u>\$0</u>	(high school)			
									Subtotal	<u>\$4,212</u>			
Total Square Feet of Permanent Space (District)		<u>2,384,182</u>	/ Total Square Feet of School Facilities (Portables)		<u>2,452,658</u>			=	<u>97.21%</u>				
TOTAL FACILITY CONSTRUCTION COST											=	<u>\$4,094</u>	

STATE FINANCING ASSISTANCE CREDIT

BOECKH Index	<u>\$200.40</u>	x	OSPI Allowance	<u>90</u>	x	State Financing Assistance %	<u>0.00%</u>	x	student factor	<u>0.078</u>	=	<u>\$0</u>	(elementary)
BOECKH Index	<u>\$200.40</u>	x	OSPI Allowance	<u>117</u>	x	State Financing Assistance %	<u>0.00%</u>	x	student factor	<u>0.025</u>	=	<u>\$0</u>	(middle school)
BOECKH Index	<u>\$200.40</u>	x	OSPI Allowance	<u>130</u>	x	State Financing Assistance %	<u>0.00%</u>	x	student factor	<u>0.042</u>	=	<u>\$0</u>	(high school)
TOTAL STATE MATCH CREDIT											=	<u>\$0</u>	

TAX PAYMENT CREDIT

(((1+ interest rate	<u>4.25%</u>	) ^	<u>10</u>	years to pay off bond) - 1] /	[ interest rate	<u>4.25%</u>	x			
(1 + interest rate	<u>4.25%</u>	) ^	<u>10</u>	years to pay off bond ] x	<u>0.00209</u>	Property tax levy rate x				
assessed value	<u>\$114,051</u>							=	<u>\$1,910</u>	(tax payment credit)

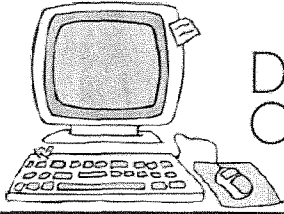
IMPACT FEE CALCULATION

SITE ACQUISITION COST	<u>\$0</u>
FACILITY CONSTRUCTION COST	<u>\$4,094</u>
RELOCATABLE FACILITIES COST (PORTABLES)	<u>\$0</u>
(LESS STATE FINANCING ASSISTANCE CREDIT)	<u>\$0</u>
(LESS TAX PAYMENT CREDIT)	<u>(\$1,910)</u>
(LESS COUNTY DISCOUNT)	<u>(\$1,092)</u>
(LESS ELECTIVE DISTRICT DISCOUNT)	<u>\$0</u>

FINAL IMPACT FEE PER UNIT	<u>\$1,092</u>
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*Appendix B*

*Student Generation Rate Study*



DOYLE  
CONSULTING

ENABLING SCHOOL DISTRICTS TO MANAGE AND USE STUDENT ASSESSMENT DATA

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## **Student Generation Rate Study for the Everett School District**

2/24/2014

This document describes the methodology used to calculate student generation rates (SGRs) for the Everett School District, and provides results of the calculations.

SGRs were calculated for two types of residential construction: Single family detached, and multi-family with 2 or more bedrooms. Attached condominiums, townhouses and duplexes are included in the multi-family classification since they are not considered “detached”. Manufactured homes on owned land are included in the single family classification.

1. Electronic records were obtained from the Snohomish County Assessor’s Office containing data on all new construction within the Everett School District from January 2006 through December 2012. As compiled by the County Assessor’s Office, this data included the address, building size, assessed value, and year built for new single and multi-family construction. The data was “cleaned up” by eliminating records which did not contain sufficient information to generate a match with the District’s student record data (i.e. incomplete addresses).
2. The District downloaded student records data into Microsoft Excel format. This data included the addresses and grade levels of all K-12 students attending the Everett School District as of February 2014. Before proceeding, this data was reformatted and abbreviations were modified as required to provide consistency with the County Assessor’s data.



3. **Single Family Rates:** The data on all new single family detached residential units in County Assessor's data were compared with the District's student record data, and the number of students at each grade level living in those units was determined. The records of 2,601 single family detached units were compared with data on 18,865 students registered in the District, and the following matches were found by grade level(s)\*:

GRADE(S)	SF	SF
	COUNT OF MATCHES	CALCULATED RATE
K	132	0.051
1	130	0.05
2	122	0.047
3	117	0.045
4	129	0.05
5	83	0.032
6	93	0.036
7	108	0.042
8	96	0.037
9	96	0.037
10	86	0.033
11	72	0.028
12	81	0.031
K-5	713	0.274
6-8	297	0.114
9-12	335	0.129
K-12	1345	0.517

4. *Large Multi-Family Developments:* Snohomish County Assessor's data does not specifically indicate the number of units or bedrooms contained in large multi-family developments. Additional research was performed to obtain this information from specific parcel ID searches, and information provided by building management, when available. Information obtained included the number of 0-1 bedroom units, the number of 2+ bedroom units, and specific addresses of 0-1 bedroom units. If specific addresses or unit numbers of 0-1 bedroom units were not provided by building management, the assumption of matches being 2+ bedroom units was made. This assumption is supported by previous SGR studies.

*Small Multi-Family Developments:* This method included all developments in the County Assessor's data containing four-plexes, tri-plexes, duplexes, condominiums and townhouses. This data contained information on the number of bedrooms for all townhouses and condominiums. Specific parcel ID searches were performed for duplex and larger units in cases where number of bedroom data was missing.

5. **Multi-Family 2+ BR Rates:** The multi-family 2+ BR SGR's were calculated by comparing data on 2+ BR multi-family units with the District's student record data, and the number of students at each grade level living in those units was determined. The records of 1299 multi-family 2+ BR units were compared with data on 18,865 students registered in the District, and the following matches were found by grade level(s)\*:

GRADE(S)	MF 2+	MF 2+
	COUNT OF MATCHES	CALCULATED RATE
K	23	0.014
1	27	0.026
2	25	0.01
3	24	0.012
4	18	0.005
5	24	0.011
6	17	0.008
7	14	0.012
8	16	0.006
9	12	0.008
10	11	0.011
11	6	0.013
12	5	0.009
K-5	101	0.078
6-8	33	0.025
9-12	54	0.042
K-12	188	0.145

6. **Multi-Family 0-1 BR Rates:** Research indicated that 562 multi-family 0-1 BR units were constructed within District boundaries during the time period covered by this study. These units were compared with the data on 18,865 students registered in the District. No specific unit number matches were made.

7. **Summary of Student Generation Rates\*:**

	K-5	6-8	9-12	K-12
Single Family	.274	.114	.129	.517
Multi-Family 2+ BR	.078	.025	.042	.145
Multi-Family 0-1 BR	.000	.000	.000	.000

\*Calculated rates for grade level groups may not equal the sum of individual grade rates due to rounding.

*Appendix C*

*OSPI Enrollment Projection Methodology*

## OSPI Enrollment Projection Methodology

### Cohort-Survival or Grade-Succession Technique

Development of a long-range school building program requires a careful forecast of school enrollment indicating the projected number of children who will attend school each year.

The following procedures are suggested for determining enrollment projections:

1. Enter in the lower left corner of the rectangle for each year the number of pupils actually enrolled in each grade on October 1 as reported on the October Report of School District Enrollment, Form M-70, Column A. (For years prior to October 1, 1965, enter pupils actually enrolled as reported in the county superintendent's annual report, Form A-1.)
2. In order to arrive at enrollment projections for kindergarten and/or grade one pupils, determine the percent that the number of such pupils each year was of the number shown for the immediately preceding year. Compute an average of the percentages, enter it in the column headed "Avg. % of Survival", and apply such average percentage in projecting kindergarten and/or grade one enrollments for the next six years.
3. For grade two and above determine the percent of survival of the enrollment in each grade for each year to the enrollment in the next lower grade during the preceding year and place this percentage in the upper right corner of the rectangle. (For example, if there were 75 pupils in actual enrollment in grade one on October 1, 1963, and 80 pupils in actual enrollment in grade two on October 1, 1964, the percent of survival would be  $80/75$ , or 106.7%. If the actual enrollment on October 1, 1965 in grade three had further increased to 100 pupils, the percent of survival to grade three would be  $100/80$ , or 125%).

Compute an average of survival percentages for each year for each grade and enter it in the column, "Avg. % of Survival".

In order to determine six-year enrollment projections for grade two and above, multiply the enrollment in the next lower grade during the preceding year by the average percent of survival. For example, if, on October 1 of the last year of record, there were 100 students in grade one and the average percent of survival to grade two was 105, then 105% of 100 would result in a projections of 105 students in grade two on October 1 of the succeeding year.

4. If, after calculating the "Projected Enrollment", there are known factors which will further influence the projections; a statement should be prepared showing the nature of those factors involved, and their anticipated effect upon any portion of the calculated projection.

\*Kindergarten students are projected based on a regression line.

State of Washington  
 STATE BOARD OF EDUCATION  
 Olympia  
 OSPI

**PROJECTION OF ENROLLMENT DATA**

School District: \_\_\_\_\_ No.: \_\_\_\_\_ County: \_\_\_\_\_

**DETERMINING SURVIVAL RATE**

Actual Enrollment (October 1st)

Projected Enrollment

20\_\_ 20\_\_ 20\_\_ 20\_\_ 20\_\_ 20\_\_ 20\_\_ Ave. % of Survival 20\_\_ 20\_\_ 20\_\_ 20\_\_ 20\_\_ 20\_\_

	20__	20__	20__	20__	20__	20__	20__	Ave. % of Survival	20__	20__	20__	20__	20__	20__
Kindergarten														
Grade 1														
Grade 2														
Grade 3														
Grade 4														
Grade 5														
Grade 6														
Grade 7														
Grade 8														
Grade 9														
Grade 10														
Grade 11														
Grade 12														
Totals 1 - 6														
1 - 8														
7 - 9														
10 - 12														
9 - 12														
Hcpd.														
Grand Total Incl. Ktgn.														

*We, the undersigned authorized representatives of the aforesaid school district, hereby certify that the information submitted herewith is, to the best of our knowledge and belief, correct and complete.*

Date \_\_\_\_\_

Signed \_\_\_\_\_  
 Chairman of the Board

Date \_\_\_\_\_

Signed \_\_\_\_\_  
 Superintendent of Schools

OSPI PROJECTED STUDENT ENROLLMENT 2014-2019

School Type	Grade Level	School Year & Grade Progression Percentage												AVG GP%
		2014	GP%	2015	GP%	2016	GP%	2017	GP%	2018	GP%	2019	GP%	
Elementary	K	770	--	774	--	778	--	782	--	786	--	789	--	--
	1	1,649	103.6%	1,595	103.6%	1,603	103.6%	1,611	103.6%	1,619	103.6%	1,627	103.6%	103.6%
	2	1,532	97.6%	1,610	97.6%	1,557	97.6%	1,565	97.6%	1,573	97.6%	1,580	97.6%	97.6%
	3	1,509	99.5%	1,524	99.5%	1,601	99.4%	1,548	99.4%	1,556	99.4%	1,564	99.4%	99.4%
	4	1,431	97.9%	1,478	97.9%	1,492	97.9%	1,568	97.9%	1,516	97.9%	1,524	97.9%	97.9%
	5	1,513	99.0%	1,417	99.0%	1,463	99.0%	1,477	99.0%	1,552	99.0%	1,501	99.0%	99.0%
Middle	6	1,420	100.1%	1,514	100.1%	1,418	100.1%	1,464	100.1%	1,478	100.1%	1,553	100.1%	100.1%
	7	1,336	99.6%	1,415	99.6%	1,509	99.7%	1,413	99.6%	1,459	99.7%	1,473	99.7%	99.7%
	8	1,446	99.4%	1,328	99.4%	1,407	99.4%	1,500	99.4%	1,405	99.4%	1,451	99.5%	99.4%
High	9	1,421	101.1%	1,462	101.1%	1,343	101.1%	1,422	101.1%	1,516	101.1%	1,420	101.1%	101.1%
	10	1,410	97.8%	1,390	97.8%	1,430	97.8%	1,314	97.8%	1,391	97.8%	1,483	97.8%	97.8%
	11	1,340	94.2%	1,329	94.3%	1,310	94.2%	1,348	94.3%	1,238	94.2%	1,311	94.2%	94.2%
	12	1,285	100.8%	1,351	100.8%	1,339	100.8%	1,320	100.8%	1,359	100.8%	1,248	100.8%	100.8%
			Growth%		Growth%		Growth%		Growth%		Growth%		Growth%	AVG%
Elementary		8,404	101.4%	8,398	99.9%	8,494	101.1%	8,551	100.7%	8,602	100.6%	8,585	99.8%	100.6%
Middle School		4,202	100.0%	4,257	101.3%	4,334	101.8%	4,377	101.0%	4,342	99.2%	4,477	103.1%	101.1%
High School		5,456	99.3%	5,532	101.4%	5,422	98.0%	5,404	99.7%	5,504	101.9%	5,462	99.2%	99.9%
<b>TOTAL:</b>		<b>18,062</b>	<b>100.4%</b>	<b>18,187</b>	<b>100.7%</b>	<b>18,250</b>	<b>100.3%</b>	<b>18,332</b>	<b>100.4%</b>	<b>18,448</b>	<b>100.6%</b>	<b>18,524</b>	<b>100.4%</b>	<b>100.5%</b>

Source: OSPI

Note: All enrollments shown are Full Time Equivalents (FTE) as of October 1 of the year indicated.

ACTUAL STUDENT ENROLLMENT 2002-2013

School Type	Grade Level	School Year & Growth Progression Percentage																								
		2002	GP%	2003	GP%	2004	GP%	2005	GP%	2006	GP%	2007	GP%	2008	GP%	2009	GP%	2010	GP%	2011	GP%	2012	GP%	2013	GP%	AVG GP%
Elementary	K	668	--	684	--	715	--	696	--	718	--	702	--	747	--	783	--	734	--	734	--	746	--	796	--	--
	1	1,327	101.0%	1,380	103.3%	1,369	100.1%	1,457	101.9%	1,497	107.5%	1,467	102.2%	1,452	103.4%	1,549	103.7%	1,595	101.9%	1,496	101.9%	1,547	105.4%	1,569	105.2%	103.1%
	2	1,334	100.1%	1,354	102.0%	1,363	98.8%	1,395	101.9%	1,434	98.4%	1,491	99.6%	1,490	101.6%	1,425	98.1%	1,502	97.0%	1,542	96.7%	1,472	98.4%	1,517	98.1%	99.2%
	3	1,429	97.0%	1,383	103.7%	1,350	99.7%	1,395	102.3%	1,419	101.7%	1,453	101.3%	1,453	97.5%	1,500	100.7%	1,403	98.5%	1,477	98.3%	1,550	100.5%	1,461	99.3%	100.0%
	4	1,410	99.1%	1,425	99.7%	1,359	98.3%	1,364	101.0%	1,401	100.4%	1,418	99.9%	1,462	100.6%	1,445	99.4%	1,427	95.1%	1,392	99.2%	1,437	97.3%	1,528	98.6%	99.1%
	5	1,455	96.9%	1,424	101.0%	1,402	98.4%	1,344	98.9%	1,398	102.5%	1,395	99.6%	1,426	100.6%	1,481	101.3%	1,425	98.6%	1,424	99.8%	1,341	96.3%	1,419	98.7%	99.4%
Middle	6	1,457	96.4%	1,462	100.5%	1,415	99.4%	1,403	100.1%	1,335	99.3%	1,425	101.9%	1,383	99.1%	1,425	99.9%	1,499	101.2%	1,411	99.0%	1,429	100.4%	1,341	100.0%	99.8%
	7	1,438	98.9%	1,426	97.9%	1,449	99.1%	1,430	101.1%	1,419	101.1%	1,370	102.6%	1,424	99.9%	1,380	99.8%	1,408	98.8%	1,471	98.1%	1,406	99.6%	1,454	101.7%	99.9%
	8	1,448	99.7%	1,401	97.4%	1,391	97.5%	1,443	99.6%	1,430	100.0%	1,443	101.7%	1,370	100.0%	1,426	100.1%	1,379	99.9%	1,403	99.6%	1,437	97.7%	1,406	100.0%	99.4%
High	9	1,632	112.9%	1,614	111.5%	1,526	108.9%	1,490	107.1%	1,829	126.7%	1,822	127.4%	1,492	103.4%	1,389	101.4%	1,432	100.4%	1,396	101.2%	1,440	102.6%	1,441	100.3%	108.7%
	10	1,461	93.8%	1,500	91.9%	1,470	91.1%	1,461	95.7%	1,512	101.5%	1,464	80.0%	1,476	81.0%	1,438	96.4%	1,365	98.3%	1,401	97.8%	1,361	97.5%	1,422	98.8%	93.7%
	11	1,352	91.5%	1,311	89.7%	1,386	92.4%	1,678	114.1%	1,373	94.0%	1,373	90.8%	1,666	113.8%	1,384	93.8%	1,365	94.9%	1,309	95.9%	1,306	93.2%	1,275	93.7%	96.5%
	12	1,258	94.8%	1,180	87.3%	1,184	90.3%	1,144	82.5%	1,055	62.9%	1,049	76.4%	1,155	84.1%	1,421	85.3%	1,444	104.3%	1,460	107.0%	1,372	104.8%	1,357	103.9%	90.3%
Elementary			Growth%		Growth%		Growth%		Growth%		Growth%		Growth%		Growth%		Growth%		Growth%		Growth%		Growth%		Growth%	AVG %
		7,623	96.5%	7,650	100.4%	7,558	98.8%	7,651	101.2%	7,867	102.8%	7,926	100.7%	8,030	101.3%	8,183	101.9%	8,086	98.8%	8,065	99.7%	8,093	100.3%	8,290	102.4%	100.4%
	Middle School	4,343	99.8%	4,289	98.8%	4,255	99.2%	4,276	100.5%	4,184	97.8%	4,238	101.3%	4,177	98.6%	4,231	101.3%	4,286	101.3%	4,285	100.0%	4,272	99.7%	4,201	98.3%	99.7%
	High School	5,703	102.3%	5,605	98.3%	5,566	99.3%	5,773	103.7%	5,769	99.9%	5,708	98.9%	5,789	101.4%	5,632	97.3%	5,606	99.5%	5,566	99.3%	5,479	98.4%	5,495	100.3%	99.9%
<b>TOTAL:</b>		<b>17,669</b>	<b>99.1%</b>	<b>17,544</b>	<b>99.3%</b>	<b>17,379</b>	<b>99.1%</b>	<b>17,700</b>	<b>101.8%</b>	<b>17,820</b>	<b>100.7%</b>	<b>17,872</b>	<b>100.3%</b>	<b>17,996</b>	<b>100.7%</b>	<b>18,046</b>	<b>100.3%</b>	<b>17,978</b>	<b>99.6%</b>	<b>17,916</b>	<b>99.7%</b>	<b>17,844</b>	<b>99.6%</b>	<b>17,986</b>	<b>100.8%</b>	<b>100.1%</b>

Source: OSPI

Note: All enrollments shown are Full Time Equivalents (FTE) as of October 1 of the year indicated.

*Appendix D*

*OFM Ratio Enrollment Projection Methodology*



## OFM Ratio Forecast Methodology

The Growth Management Act requires that capital facilities plans for schools consider enrollment forecasts that are related to official population forecasts for the district. The OFM ratio method computes past enrollment as a percentage of past population and then projects how those percentage trends will continue into the future. Snohomish County prepares the population estimates by distributing official estimates from the Washington Office of Financial Management (OFM) to the school district level. The assumed percentage trends are then applied to these County population forecasts.

There are currently three alternative population estimates issued by Snohomish County.

	<u>2019</u>	<u>2035</u>
Alternative 1:	149,425	194,260
Alternative 2:	<b>145,058</b>	<b>178,210</b>
Alternative 3:	145,025	178,088

Student enrollment totals were published by OSPI in late 2013. The ratio of student population to total population between 2006-2013 is shown below:

<b>Table D-1</b>								
<b>Historical Student/Population Ratio</b>								
(FTE Student Enrollment)								
	<b>2006</b>	<b>2007</b>	<b>2008</b>	<b>2009</b>	<b>2010</b>	<b>2011</b>	<b>2012</b>	<b>2013</b>
Population	122,733	124,578	126,150	127,730	129,842	130,251	131,214	132,626
FTE Student Enrollment	17,820	17,872	17,996	18,046	17,927	17,880	17,844	17,986
Student/ Population Ratio	14.52%	14.35%	14.27%	14.13%	13.81%	13.73%	13.60%	13.56%

District enrollment as a percentage of population declined each year. In its 2012 Capital Facilities Plan update, the District estimated a ratio of 13.50% vs. the 13.56% actually reported.

### Future Forecast

For its planning purposes, the District has accepted the Alternative 2 estimate of 178,210 for 2035 and 145,058 for 2019. The District is aware of opinions by the City of Everett that its forecasted population is nearer to the mid-range estimate than the higher figure. To accept Alternative 3, Mill Creek would have to be assumed to take a significantly higher percentage of population growth which is not likely to happen.

Combining the three alternative population estimates by the County with the OSPI estimates for 2019 (Table D-2) produces a student: population ratio that the District considers too low. The range of 12.92% to 13.30% would be significantly below any ratio dating to at least Year 2000 and is considered too conservative for long range capital facility planning purposes.

The District will assume a future student:population ratio of 13.75% for 2019 and 14% for 2035. The ratios reflect a declining percentage as the population ages, but also provide a comfortable margin for long range planning by using a figure that is more in line with, albeit still lower than, past ratio trends. It is the mid-point between the ratios occurring 2006-2013.

**Table D-2  
2019 Estimates  
Using OSPI Estimates**

	<b>County PDS Alt. 1</b>	<b>County PDS Alt. 2</b>	<b>County PDS Alt. 3</b>
District Population	149,435	145,058	145,025
OSPI	19,313		
Ratio	12.92%	13.3%	13.3%

The above assumptions produce the following OFM-based FTE enrollment figures for use in the 2014 CFP.

**Table D-3  
Estimated Enrollment (FTE)**

<b>2010 Actual</b>	<b>2011 Actual</b>	<b>2012 Actual</b>	<b>2013 Actual</b>	<b>2014</b>	<b>2015</b>	<b>2016</b>	<b>2017</b>	<b>2018</b>	<b>2019</b>	<b>2035</b>
17,927	17,880	17,844	17,986	18,124	18,386	18,613	18,840	19,393	19,945	24,949

*Appendix E*

**Kendrick Enrollment Projection Methodology**

# Kendrick Enrollment Projection Methodology

W. Les Kendrick, Ph.D., Educational Data Solutions, LLC

Enrollment for the Everett School District was projected using grade progression methods (cohort survival ratios) that track the progress of students as they progress from grade to grade. This method compares the enrollment in a given year at a specific grade (e.g., 2<sup>nd</sup> grade) to the enrollment at the previous grade from the previous year (1<sup>st</sup> grade). The ratio of these two numbers provides an indication of whether enrollment typically stays the same, grows, or declines as students progress from one grade to the next. The progression ratios at each grade level were averaged over several years and then applied to the current year grade level enrollment (e.g., 2<sup>nd</sup> grade) to predict next year's enrollment at the subsequent grade (e.g., 3<sup>rd</sup> grade). This was done for every grade except kindergarten. The numbers were then adjusted and modified based on additional information about housing and population growth within the District (more on this below).

Kindergarten enrollment was projected by comparing the kindergarten enrollment in a given year to county births 5 years prior to that year (birth-to-k ratio). The average of this number for the last several years was then used to predict next year's enrollment. The average was also applied to future known birth cohorts to project subsequent years. For years in which birth data was not available, births were projected based on forecasts of the county population available from State and local jurisdictions, State birth forecasts, the correlation between State and County birth rates, and an assessment of the most recently available fertility rates for the county.

After completing the initial forecast, the numbers were adjusted using new home construction data, county population forecasts, and forecasts of the future K-12 population in the county. New Home construction data was obtained from New Home Trends, including information about currently permitted units as well as information about future planned development within the Everett School District. Population forecasts for the county were obtained from State and county planning offices. And a forecast of the population for the Everett School District was created based on forecasts of growth for neighborhoods in and around the District and recent population estimates for the District. All of this information was considered and used to adjust the final forecast numbers, so that they would more closely reflect expected changes in housing and population growth within the District's boundary area in the coming years.

**Kendrick Enrollment Projections (FTE)**

4/8/2014

**ELEMENTARY SCHOOL**

CEDAR WOOD	Actual Oct. 1 Enrollments				Projected Oct. 1 Enrollments					
	2010	2011	2012	2013	2014	2015	2016	2017	2018	2019
K	45	43	45	38	42	40	40	41	40	41
1	79	100	95	106	92	99	95	95	97	96
2	72	89	100	108	116	98	107	102	101	104
3	95	79	101	106	120	127	106	116	110	110
4	96	96	81	97	116	128	135	114	124	118
5	87	99	95	89	106	124	137	144	122	132
<b>TOTALS</b>	<b>474</b>	<b>506</b>	<b>517</b>	<b>544</b>	<b>592</b>	<b>616</b>	<b>620</b>	<b>611</b>	<b>595</b>	<b>601</b>

**EMERSON**

K	55	50	56	59	55	54	53	55	55	55
1	123	111	93	118	119	111	110	109	113	113
2	99	114	101	90	112	114	106	105	105	108
3	94	96	112	101	87	109	110	102	102	102
4	97	92	91	112	95	83	104	105	98	98
5	79	87	83	85	106	91	78	99	101	94
<b>TOTALS</b>	<b>547</b>	<b>550</b>	<b>536</b>	<b>565</b>	<b>575</b>	<b>561</b>	<b>561</b>	<b>576</b>	<b>574</b>	<b>569</b>

**FOREST VIEW**

K	48	42	39	51	44	43	43	45	45	45
1	108	99	97	95	119	104	103	103	106	107
2	94	111	96	84	93	118	103	102	101	105
3	70	91	105	100	83	93	118	103	102	102
4	84	67	88	106	97	82	92	117	102	101
5	83	86	72	88	103	96	80	90	116	101
<b>TOTALS</b>	<b>487</b>	<b>496</b>	<b>497</b>	<b>524</b>	<b>540</b>	<b>536</b>	<b>539</b>	<b>560</b>	<b>572</b>	<b>560</b>

**GARFIELD**

K	25	26	38	41	35	33	33	35	34	35
1	67	63	63	76	94	83	79	78	82	82
2	50	66	58	55	70	88	78	75	74	78
3	62	46	67	61	51	67	85	75	71	71
4	50	53	48	57	57	48	63	80	71	67
5	58	51	53	44	53	53	45	60	76	67
<b>TOTALS</b>	<b>312</b>	<b>305</b>	<b>327</b>	<b>334</b>	<b>360</b>	<b>373</b>	<b>383</b>	<b>403</b>	<b>410</b>	<b>400</b>

**HAWTHORNE**

K	45	42	51	42	43	42	42	44	43	44
1	92	78	84	98	79	82	82	81	84	84
2	83	83	77	80	87	72	74	75	74	76
3	86	69	75	66	72	80	66	69	68	68
4	78	77	59	73	58	65	73	60	62	62
5	78	76	59	55	65	52	59	66	53	56
<b>TOTALS</b>	<b>462</b>	<b>425</b>	<b>405</b>	<b>414</b>	<b>404</b>	<b>393</b>	<b>396</b>	<b>394</b>	<b>385</b>	<b>389</b>

**JACKSON**

K	25	40	35	36	36	34	34	36	35	35
1	65	55	78	67	74	73	70	69	72	72
2	58	61	50	70	64	69	68	64	64	67
3	48	63	54	40	68	60	65	64	61	61
4	56	48	65	63	38	63	56	60	59	57
5	48	52	39	53	61	35	59	52	55	55
<b>TOTALS</b>	<b>300</b>	<b>319</b>	<b>321</b>	<b>329</b>	<b>341</b>	<b>334</b>	<b>351</b>	<b>345</b>	<b>347</b>	<b>346</b>

	Actual Oct. 1 Enrollments					Projected Oct. 1 Enrollments					
		2010	2011	2012	2013	2014	2015	2016	2017	2018	2019
<b>JEFFERSON</b>											
K	39	55	44	54	48	48	47	49	49	49	49
1	84	81	102	86	103	96	95	94	98	97	97
2	92	86	77	100	85	104	96	96	94	98	98
3	84	94	87	83	100	87	106	99	98	97	97
4	77	87	93	86	82	100	88	107	99	99	99
5	83	88	80	96	85	82	101	88	108	100	100
TOTALS	459	491	483	505	503	517	533	533	546	540	540
<b>LOWELL</b>											
K	38	42	37	43	38	38	38	39	39	39	39
1	96	87	83	78	89	81	82	81	84	84	84
2	72	84	87	79	72	84	77	78	77	80	80
3	78	75	94	72	74	70	82	74	75	75	75
4	63	78	78	86	67	71	67	77	71	72	72
5	65	69	75	68	80	64	67	64	73	68	68
TOTALS	412	435	454	426	420	408	413	414	420	418	418
<b>MADISON</b>											
K	40	39	37	40	37	36	36	38	37	37	37
1	75	87	74	76	80	75	76	74	78	78	78
2	80	79	68	69	70	76	72	72	70	74	74
3	72	76	80	77	65	67	73	69	69	68	68
4	75	71	73	71	71	62	64	69	66	66	66
5	69	74	66	66	66	67	59	61	65	62	62
TOTALS	411	426	398	399	389	383	378	381	386	385	385
<b>MILL CREEK</b>											
K	55	49	45	54	50	47	47	48	48	48	48
1	119	98	108	93	113	103	98	98	101	101	101
2	132	120	101	117	95	114	104	99	98	102	102
3	112	131	118	92	121	97	116	106	101	101	101
4	111	120	123	122	94	121	98	117	107	102	102
5	123	117	113	126	124	94	121	98	118	107	107
TOTALS	652	635	608	604	596	576	584	566	573	561	561
<b>MONROE</b>											
K	43	39	46	52	46	45	45	47	46	47	47
1	84	91	98	88	113	101	100	100	103	103	103
2	89	68	101	95	87	113	101	100	99	103	103
3	81	82	74	102	95	88	114	102	101	101	101
4	75	75	88	70	100	94	88	114	102	101	101
5	89	76	81	87	68	100	94	87	114	102	102
TOTALS	461	431	488	494	510	541	542	550	566	555	555
<b>PENNY CREEK</b>											
K	52	55	52	53	52	51	50	52	52	52	52
1	128	104	125	95	108	107	105	104	108	107	107
2	129	134	112	127	96	109	108	106	105	109	109
3	123	125	133	109	129	98	111	110	108	107	107
4	117	131	127	125	110	130	99	112	111	109	109
5	123	121	131	117	126	110	130	99	113	111	111
TOTALS	672	670	680	626	621	605	603	583	596	595	595
<b>SILVER FIRS</b>											
K	51	42	44	43	41	41	41	42	42	42	42
1	99	89	74	91	82	79	81	79	82	82	82
2	100	92	88	70	89	81	79	81	79	82	82
3	76	94	94	84	69	90	83	80	82	80	80
4	89	72	96	102	82	69	90	82	80	81	81
5	94	88	77	96	100	81	68	89	82	80	80
TOTALS	509	477	473	486	462	442	441	454	447	447	447

SILVER LAKE	Actual Oct. 1 Enrollments				Projected Oct. 1 Enrollments					
	2010	2011	2012	2013	2014	2015	2016	2017	2018	2019
K	46	43	49	43	47	43	43	45	44	44
1	91	89	89	92	92	94	87	85	89	89
2	73	86	96	91	97	90	93	86	84	88
3	69	77	89	86	97	97	91	93	86	84
4	82	68	69	82	91	95	96	89	92	84
5	78	76	64	74	86	89	94	94	88	90
TOTALS	439	439	456	468	509	509	502	492	483	480

VIEW RIDGE	2010	2011	2012	2013	2014	2015	2016	2017	2018	2019
K	47	38	37	39	36	36	36	37	37	37
1	83	72	73	100	79	75	76	75	78	78
2	88	89	83	92	99	79	75	77	76	79
3	88	90	85	90	92	101	82	77	79	78
4	100	82	85	90	89	92	102	82	78	79
5	104	83	80	88	89	89	93	102	83	79
TOTALS	510	454	443	499	482	472	463	451	431	430

WHITTIER	2010	2011	2012	2013	2014	2015	2016	2017	2018	2019
K	25	34	29	30	30	30	30	31	30	31
1	76	68	66	61	67	68	69	67	70	70
2	61	70	64	59	63	71	72	73	70	74
3	62	69	70	73	61	66	76	76	78	75
4	73	64	59	75	75	64	69	79	80	81
5	60	76	68	66	77	78	66	73	83	83
TOTALS	357	381	356	364	373	377	381	399	411	414

WOODSIDE	2010	2011	2012	2013	2014	2015	2016	2017	2018	2019
K	52	54	64	74	66	63	62	65	65	65
1	116	116	129	133	157	140	136	134	140	139
2	120	97	104	117	131	154	138	134	132	137
3	92	116	99	111	117	130	154	138	134	132
4	95	101	110	102	109	115	128	152	136	131
5	100	94	99	108	101	107	113	126	149	133
TOTALS	575	578	605	645	679	711	733	749	755	738

OTHER	2010	2011	2012	2013	2014	2015	2016	2017	2018	2019
K	6	4	5	10	7	6	7	7	7	7
1	10	8	18	20	22	14	14	14	15	15
2	10	13	10	16	20	22	14	14	14	15
3	11	4	15	10	16	20	22	15	14	14
4	9	10	4	9	10	16	20	22	14	14
5	4	11	6	12	9	10	16	20	22	14
TOTALS	50	50	58	77	82	88	92	91	87	81

ELEMENTARY	Actual Oct. 1 Enrollments				Projected Oct. 1 Enrollments					
	2010	2011	2012	2013	2014	2015	2016	2017	2018	2019
K	734	734	747	797	751	734	727	755	752	756
1	1,595	1,496	1,549	1,573	1,680	1,586	1,555	1,540	1,599	1,593
2	1,502	1,542	1,473	1,519	1,546	1,654	1,565	1,534	1,519	1,577
3	1,403	1,477	1,552	1,463	1,517	1,547	1,659	1,570	1,539	1,524
4	1,427	1,392	1,437	1,528	1,441	1,497	1,530	1,640	1,552	1,522
5	1,425	1,424	1,341	1,418	1,505	1,422	1,480	1,513	1,622	1,535
TOTALS	8,086	8,065	8,099	8,298	8,440	8,441	8,517	8,553	8,584	8,508

9191

**MIDDLE SCHOOL**

	Actual Oct. 1 Enrollments					Projected Oct. 1 Enrollments				
	2010	2011	2012	2013	2014	2015	2016	2017	2018	2019
EISENHOWER										
6	306	282	274	265	289	274	301	326	294	333
7	292	302	291	282	272	294	280	307	332	300
8	287	298	301	299	293	278	303	289	317	342
TOTALS	885	882	866	846	853	847	884	922	944	975

**EVERGREEN**

6	356	342	333	311	323	360	328	318	353	350
7	359	352	345	330	304	320	357	325	315	350
8	352	351	348	339	326	301	319	356	324	314
TOTALS	1,067	1,045	1,026	980	952	981	1,004	1,000	993	1,014

**GATEWAY**

6	250	265	264	256	276	304	281	269	287	297
7	223	252	267	262	258	275	303	280	268	286
8	201	217	248	262	265	256	274	303	280	267
TOTALS	674	734	779	780	798	835	859	852	835	850

**HEATHERWOOD**

6	331	290	303	286	314	311	299	345	336	384
7	304	322	287	308	284	315	312	300	345	337
8	311	307	311	296	315	290	324	321	308	354
TOTALS	946	919	901	890	913	916	935	966	990	1,076

**NORTH**

6	243	226	240	219	212	247	212	222	243	258
7	220	229	211	253	217	211	247	210	220	242
8	218	222	221	199	248	211	206	242	206	216
TOTALS	681	677	672	671	677	670	665	674	669	715

**OTHER**

6	13	5	15	8	10	11	10	11	11	12
7	10	14	5	20	13	14	15	14	15	15
8	10	8	8	12	10	10	10	11	10	11
TOTALS	33	27	28	40	33	35	35	36	36	38

MIDDLE SCHOOL	Actual Oct. 1 Enrollments					Projected Oct. 1 Enrollments				
	2010	2011	2012	2013	2014	2015	2016	2017	2018	2019
6	1,499	1,410	1,429	1,345	1,423	1,508	1,432	1,491	1,524	1,634
7	1,408	1,471	1,406	1,455	1,347	1,429	1,514	1,438	1,497	1,530
8	1,379	1,403	1,437	1,407	1,455	1,347	1,436	1,522	1,445	1,504
TOTALS	4,286	4,284	4,272	4,207	4,225	4,284	4,382	4,451	4,466	4,668



**HIGH SCHOOL**

CASCADE	Actual Oct. 1 Enrollments				Projected Oct. 1 Enrollments					
	2010	2011	2012	2013	2014	2015	2016	2017	2018	2019
9	521	474	491	437	458	473	438	467	496	470
10	462	502	446	482	420	440	454	421	449	476
11	457	441	465	419	454	393	412	426	395	421
12	432	439	441	467	414	447	388	408	421	390
TOTALS	1,872	1,856	1,843	1,805	1,746	1,753	1,693	1,722	1,760	1,758

**EVERETT**

9	389	382	399	409	396	414	384	410	434	412
10	388	353	376	380	385	379	397	369	393	416
11	341	347	311	315	326	334	329	345	321	341
12	364	341	343	296	301	316	325	320	336	312
TOTALS	1,482	1,423	1,429	1,400	1,409	1,443	1,435	1,444	1,483	1,481

**JACKSON**

9	513	507	533	580	552	567	527	561	594	565
10	480	493	507	515	567	539	554	514	549	581
11	470	455	444	472	480	526	500	515	478	510
12	441	471	435	447	468	474	520	495	509	472
TOTALS	1,904	1,926	1,919	2,014	2,068	2,106	2,102	2,086	2,130	2,128

**SEQUOIA**

9	3	24	8	8	11	11	10	11	12	11
10	26	42	31	38	36	35	38	35	37	39
11	89	61	82	70	74	74	72	76	70	75
12	185	197	152	151	151	157	155	153	161	149
TOTALS	303	324	273	267	272	276	275	275	279	274

**OTHER**

9	6	9	9	8	8	9	8	9	9	9
10	9	11	5	10	9	8	9	8	9	9
11	8	9	7	9	9	9	9	9	8	9
12	22	9	9	4	6	7	7	6	7	6
TOTALS	45	38	30	31	32	32	32	32	33	32

HIGH SCHOOL	Actual Oct. 1 Enrollments				Projected Oct. 1 Enrollments					
	2010	2011	2012	2013	2014	2015	2016	2017	2018	2019
9	1,432	1,396	1,440	1,442	1,425	1,474	1,367	1,458	1,545	1,467
10	1,365	1,401	1,365	1,425	1,418	1,401	1,452	1,347	1,436	1,522
11	1,365	1,313	1,309	1,285	1,343	1,336	1,323	1,371	1,272	1,356
12	1,444	1,457	1,380	1,365	1,340	1,400	1,396	1,382	1,433	1,329
TOTALS	5,606	5,567	5,494	5,517	5,526	5,611	5,538	5,558	5,686	5,674

**ALL GRADE LEVELS**

DIST. TOTALS	Actual Oct. 1 Enrollments				Projected Oct. 1 Enrollments					
	2010	2011	2012	2013	2014	2015	2016	2017	2018	2019
TOTALS	17,978	17,916	17,865	18,022	18,191	18,335	18,436	18,562	18,736	18,850

*Appendix F*

*Appendix F of the General Policy Plan*

## APPENDIX F

### REVIEW CRITERIA FOR SCHOOL DISTRICT CAPITAL FACILITY PLANS

#### Required Plan Contents

1. Future Enrollment Forecasts by Grade Span, including:
  - a 6-year forecast (or more) to support the financing program;
  - a description of the forecasting methodology and justification for its consistency with OFM population forecasts used in the county's comprehensive plan.
  
2. Inventory of Existing Facilities, including:
  - the location and capacity of existing schools;
  - a description of educational standards and a clearly defined minimum level of service such as classroom size, school size, use of portables, etc.;
  - the location and description of all district-owned or leased sites (if any) and properties;
  - a description of support facilities, such as administrative centers, transportation and maintenance yards and facilities, etc.; and
  - information on portables, including numbers, locations, remaining useful life (as appropriate to educational standards), etc.
  
3. Forecast of Future Facility Needs, including:
  - identification of new schools and/or school additions needed to address existing deficiencies and to meet demands of projected growth over the next 6 years; and
  - the number of additional portable classrooms needed.
  
4. Forecast of Future Site Needs, including:
  - the number, size, and general location of needed new school sites.
  
5. Financing Program (6-year minimum Planning Horizon)
  - estimated cost of specific construction and site acquisition and development projects proposed to address growth-related needs;
  - projected schedule for completion of these projects; and
  - proposed sources of funding, including impact fees (if proposed), local bond issues (both approved and proposed), and state matching funds.
  
6. Impact Fee Support Data (where applicable), including:
  - an explanation of the calculation methodology, including description of key variables and their computation;
  - definitions and sources of data for all inputs into the fee calculation, indicating that it:
    - a) is accurate and reliable and that any sample data is statistically valid;
    - b) accurately reflects projected costs in the 6-year financing program; and
  - a proposed fee schedule that reflects expected student generation rates from, at minimum, the following residential unit types: single-family, multi-family/studio or 1-bedroom, and multi-family/2-bedroom or more.

### Plan Performance Criteria

1. School facility plans must meet the basic requirements set down in RCW 36.70A (the Growth Management Act). Districts proposing to use impact fees as a part of their financing program must also meet the requirements of RCW 82.02.
2. Where proposed, impact fees must utilize a calculation methodology that meets the conditions and tests of RCW 82.02.
3. Enrollment forecasts should utilize established methods and should produce results which are not inconsistent with the OFM population forecasts used in the county comprehensive plan. Each plan should also demonstrate that it is consistent with the 20-year forecast in the land use element of the county's comprehensive plan.
4. The financing plan should separate projects and portions of projects which add capacity from those which do not, since the latter are generally not appropriate for impact fee funding. The financing plan and/or the impact fee calculation formula must also differentiate between projects or portions of projects which address existing deficiencies (ineligible for impact fees) and those which address future growth-related needs.
5. Plans should use best-available information from recognized sources, such as the U.S. Census or the Puget Sound Regional Council. District-generated data may be used if it is derived through statistically reliable methodologies.
6. Districts which propose the use of impact fees should identify in future plan updates alternative funding sources in the event that impact fees are not available due to action by the state, county or the cities within their district boundaries.
7. Repealed effective January 2, 2000.

### Plan Review Procedures

1. District capital facility plan updates should be submitted to the County Planning and Development Services Department for review prior to formal adoption by the school district.
2. Each school district planning to expand its school capacity must submit to the county an updated capital facilities plan at least every 2 years. Proposed increases in impact fees must be submitted as part of an update to the capital facilities plan, and will be considered no more frequently than once a year.
3. Each school district will be responsible for conducting any required SEPA reviews on its capital facilities plan prior to its adoption, in accordance with state statutes and regulations.

4. School district capital facility plans and plan updates must be submitted no later than 60 calendar days prior to their desired effective date. (For example, if a district requires its updated plan to take effect on January 1, 2007 in order to meet the minimum updating requirement of item 2. above, it must formally submit that plan no later than October 30, 2006.)

5. District plans and plan updates must include a resolution or motion from the district school board adopting the plan before it will become effective.

*Appendix G*

*Levels of Service Report*

2013-2014

**Levels of Service Report**

*(October 2013 Enrollment)*

**Minimum Levels of Service**

Washington state law (RCW 36.70A.020) requires that public facilities and services necessary to support new housing developments shall be adequate to serve the development at the time the development is available for occupancy and use without decreasing current service levels below locally established minimum standards (minimum levels of services).

The Everett School District sets the minimum levels of service as the district-wide average class size. The district's class size goals are described in Section 3: Educational Program Standards, Minimum Levels of Service, on page 3-4. The average class sizes for the 2013-2014 school year are shown below.

**Average Class Size**

	<b>Elementary</b>
<b>Kindergarten</b>	<b>22.8</b>
<b>Grades 1 - 5</b>	<b>25.7</b>
	<b>Middle School</b>
<b>Grades 6 - 8</b>	<b>24.4</b>
	<b>High School</b>
<b>Grades 9 - 12</b>	<b>26.2</b>

*Appendix H*

*Impact Fee Report*



**2012 & 2013  
School Impact Fee Report**

**2012**

**Impact Fees <sup>1</sup>**

Revenue:	\$ 692,719.00	
Expenditures:	\$ 357,835.19	<u>Sites</u>
	\$ 118,065.85	Woodside Elementary School
	\$ 90,080.89	Heatherwood Middle School
	\$ 149,688.45	HM Jackson High School

**Mitigation Fee Credit <sup>2</sup>**

2012 Beginning Balance:	\$ 4,481,766.00
Mitigation Fee Certificates:	\$ 464,023.00
2012 Ending Balance:	\$ 4,017,743.00

**2013**

**Impact Fees <sup>1</sup>**

Revenue:	\$ 560,885.00	
Expenditures:	\$ 188,437.86	<u>Sites</u>
	\$ 11,125.77	Jefferson Elementary School
	\$ 113,495.36	Woodside Elementary School
	\$ 2,383.53	Heatherwood Middle School
	\$ 61,433.20	HM Jackson High School

**Mitigation Fee Credit <sup>2</sup>**

2013 Beginning Balance:	\$ 4,017,743.00
Mitigation Fee Certificates:	\$ 451,962.00
2013 Ending Balance:	\$ 3,565,781.00

Impact fees are collected on housing developments within unincorporated Snohomish County (excluding the cities of Everett and Mill Creek). The revenues represent the total amount the district received from developers. The expenditures shows the amounts spent by the district at the identified schools.

The mitigation fee credit shows the value of the Mitigation Fee Certificates used by developers. The charts shows the amount of the certificates claimed on developments within unincorporated Snohomish County. None of the certificates were used for developments within the cities of Everett and Mill Creek.

Notes:

1. Impact fee revenue was expended to relocate existing portables and/or purchase new portables to provide additional capacity at schools with unhoused students.
2. In 2008, the District purchased a 30 acre parcel on 180th Street SE as a site for future schools. As part of the purchase and sale agreement with the seller was a Mitigation Fee Credit for \$4,660,000. All redeemed certificates are credited towards the existing balance.

LAKE STEVENS SCHOOL  
DISTRICT NO. 4  
CAPITAL FACILITIES PLAN  
2014 - 2019

*prepared for:*

Snohomish County  
Planning Department

*And*

City of Lake Stevens  
City of Marysville

June 2014

REVIEW DRAFT

**CAPITAL FACILITIES PLAN  
LAKE STEVENS SCHOOL DISTRICT NO. 4**

**BOARD OF DIRECTORS**

John Boerger  
Kevin Plemel  
Paul Lund  
David Iseminger  
Mari Taylor

**SUPERINTENDENT**

Amy Beth Cook, Ed.D.

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 Lake Stevens School District Capital Facilities Plan contact the District at (425) 335-1500

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## **INTRODUCTION**

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

The Washington Growth Management Act (GMA) outlines thirteen broad goals including adequate provision of necessary public facilities and services. Schools are among these necessary facilities and services. The public school districts serving Snohomish County residents have developed 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.

This Capital Facilities Plan (CFP) is intended to provide the Lake Stevens School District (District), Snohomish County, the City of Lake Stevens, the City of Marysville and other jurisdictions a description of facilities needed to accommodate projected student enrollment at acceptable levels of service over the next twenty years, with a more detailed schedule and financing program for capital improvements over the next six years (2014-2019).

The CFP for the District was first prepared in 1998 in accordance with the specifications set in Snohomish County Code; "certification" packets were prepared earlier for the County's old SEPA-based "fee" program. When Snohomish County adopted its GMA Comprehensive Plan in 1995, it addressed future school capital facilities plans in Appendix F of the General Policy Plan. This part of the plan establishes the criteria for all future updates of the District CFP, which is to occur every two years. This CFP updates the GMA-based Capital Facilities Plan last adopted by the District in 2012.

In accordance with GMA mandates, and Snohomish County Chapter 30.66C, this CFP contains the following required elements:

- Future enrollment forecasts for each grade span (elementary, middle, mid-high and high).
- An inventory of existing capital facilities owned by the District, showing the locations and student capacities of the facilities.
- A forecast of the future needs for capital facilities and school sites; distinguishing between existing and projected deficiencies.
- 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 that add capacity from those which do not, since the latter are generally not appropriate for impact fee funding. The financing plan and/or the impact fee calculation formula must also differentiate between projects or portions of projects that address existing deficiencies (ineligible for impact fees) and those which address future growth-related needs.
- A calculation of impact fees to be assessed and support data substantiating said fees.
- A report on fees collected since 2012 and how those funds were used.
- A Level of Service report comparing the Districts adopted educational service standards with actual experience since the 2012 report.

In developing this CFP, the guidelines of Appendix F of the General Policy Plan were used as follows:

- Information was 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 is to be consistent with the State Office of Financial Management (OFM) population forecasts and those of Snohomish County.
- Chapter 30.66C requires that student generation rates be independently calculated by each school district. Rates were updated for this CFP.
- The CFP complies with RCW 36.70A (the Growth Management Act) and, where impact fees are to be assessed, RCW 82.02.
- The calculation methodology for impact fees meets the conditions and test of RCW 82.02. Districts which propose the use of impact fees should identify in future plan updates alternative funding sources in the event that impact fees are not available due to action by the state, county or the cities within their district boundaries.

Adoption of this CFP by reference by the County and cities constitutes approval of the methodology used herein.

Unless otherwise noted, all enrollment and student capacity data in this CFP is expressed in terms of FTE (Full Time Equivalent)<sup>1</sup>.

### ***Overview of the Lake Stevens School District***

The Lake Stevens School District is located six miles east of downtown Everett, and encompasses all of the City of Lake Stevens as well as portions of unincorporated Snohomish County and a small portion of the City of Marysville. The District is located south of the Marysville School District and north of the Snohomish School District.

The District currently serves a student population of 8,187 (October 1, 2013 headcount) with six elementary schools, two middle schools, one mid-high school, one high school and one homeschool partnership program (HomeLink). Elementary schools provide educational programs for students in Kindergarten through grade five. Middle schools serve grades six and seven, the mid-high serves grades eight and nine and the high school serves grades ten through twelve. HomeLink provides programs for students from Kindergarten through grade twelve.

### ***Significant Issues Related to Facility Planning in the Lake Stevens School District***

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

- uneven distribution of growth across the district, requiring facilities to balance enrollment;
- aging school facilities;

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<sup>1</sup> Full Time Equivalents (FTE) include half the students attending kindergarten and all students enrolled in grades 1 – 12.

- the need for additional property and lack of suitable sites to accommodate a school facility;
- inability to locate more temporary classrooms on school sites without significant site improvements required.

These issues are addressed in greater detail in this Capital Facilities Plan.



## SECTION 2: DEFINITIONS

Note: Definitions of terms preceded by an asterisk (\*) are provided in Chapter 30.9SCC. They are included here, in some cases with further clarification to aid in the understanding of this CFP. Any such clarifications provided herein in no way affect the legal definitions and meanings assigned to them in Chapter 30.9SCC.

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

\*Area Cost Allowance (Boeckh Index) means the current OSPI construction allowance for construction costs for each school type.

\*Average Assessed Value average assessed value by dwelling unit type for all residential units constructed within the district. These figures are provided by Snohomish County. For the 2014 Capital Facilities Plan the listed values are \$232,647 for single family dwellings, \$94,676 for "large unit" multiple family; and \$64,444 for "small unit" multiple family.

\*Boeckh Index means the number generated by the E. H. Boeckh Company and used by OSPI as a guideline for determining the area cost allowance for new school construction. The Index for the 2014 Capital Facilities Plan is \$200.40, as provided by Snohomish County.

\*Board means the Board of Directors of the Lake Stevens School District ("School Board").

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

\*Capital Facilities Plan (CFP) means the District's facilities plan adopted by its school board consisting of those elements required by Chapter 30.66C and meeting the requirements of the GMA and Appendix F of the General Policy Plan. The definition refers to this document.

\*City means City of Lake Stevens and/or City of Marysville.

\*Council means the Snohomish County Council and/or the Lake Stevens or Marysville City Council.

\*County means Snohomish County.

\*Commerce means the Washington State Department of Commerce.

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

\*Development means all subdivisions, short subdivisions, conditional use 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, the City of Lake Stevens and/or City of Marysville.

\*Development Activity means any residential construction or expansion of a building, structure or use of land or any other change of 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 and/or City, which authorizes the commencement of a development activity.

\*Director means the Director of the Snohomish County Department of Planning and Development Services (PDS), or the Director's designee.

District means Lake Stevens School District No. 4

\*District Property Tax Levy Rate means the District's current capital property tax rate per thousand dollars of assessed value. For this Capital Facilities Plan, the assumed levy rate is .00159.

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

\*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.

\*FTE (Full Time Equivalent) is a means of measuring student enrollment based on the number of hours per day in attendance at the District's schools. A student is considered one FTE if he/she is enrolled for the equivalent of a full schedule each full day. Kindergarten students attend half-day programs and therefore are counted as 0.5 FTE. For purposes of this Capital Facilities Plan, all other students are counted as full FTE. (This is in line with OSPI's FTE measurements and projections.)

\*GFA (per student) means the Gross Floor Area per student.

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

Growth Management Act (GMA) - means the Growth Management Act (RCW 36.70A)

\*Interest Rate means the current interest rate as stated in the Bond Buyer Twenty Bond General Obligation Bond Index. For this Capital Facilities Plan an assumed rate of 4.38% is used, as provided by Snohomish County.

\*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 Dwelling Unit means any residential dwelling unit that is not a single-family unit as defined by ordinance Chapter 30.66C.<sup>2</sup>

\*OFM means Washington State Office of Financial Management.

\*OSPI means Washington State Office of the Superintendent of Public Instruction.

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

\*R.C.W. means the Revised Code of Washington (a state law).

\*Relocatable Facilities (also referred to as Portables) means factory-built structures, transportable in one or more sections, that are designed to be used as an education spaces and are needed to prevent the overbuilding of school facilities, to meet the needs of service areas within the 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 the 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.

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<sup>2</sup> For purposes of calculating Student Generation Rates, assisted living or senior citizen housing is not included in this definition.

\*SEPA means the State Environmental Policy Act (RCW 43.21C).

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

\*Standard of Service means the standard adopted by the 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 that 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 (SGR)] means the number of students of each grade span (elementary, middle, mid-high, high school) that the District determines are typically generated by different dwelling unit types within the District. Each 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 District. (See Appendix D)

\*Subdivision means all small and large lot subdivisions as defined in Section 30.41 of the Snohomish County Code.

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

\*Teaching Station means a facility space (classroom) specifically dedicated to implementing the District's educational program and capable of accommodating at any one time, at least a full class of up to 30 students. In addition to traditional classrooms, these spaces can include computer labs, auditoriums, gymnasiums, music rooms and other special education and resource rooms.

\*Unhoused Students means 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 means the Washington Administrative Code.

### SECTION 3: 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 that 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, government mandates and community expectations may 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, English as a second language, remediation, migrant education, alcohol and drug education, AIDS education, preschool and daycare programs, computer labs, music programs, etc. These special or nontraditional educational programs can have a significant impact on the available student capacity of school facilities.

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

- Bilingual Program
- Behavioral Program
- Community Education
- Conflict Resolution
- Contract-Based Learning
- Credit Retrieval
- Drug Resistance Education
- Early Learning Center, which includes ECEAP and developmentally-delayed preschool
- Highly Capable
- Home School Partnership (HomeLink)
- Language Assistance Program (LAP)
- Life Skills Self-Contained Program
- Multi-Age Instruction
- Running Start
- Senior Project (volunteer time as part of course work)
- Summer School
- Structured Learning Center
- Title I

- Title 2
- Career and Technical Education

Variations in student capacity between 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 regular classroom 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 requirements will undoubtedly change in the future as a result of changes in the program year, special programs, class sizes, grade span configurations, state funding levels 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.

The District's minimum educational program requirements, which directly affect school capacity, are outlined below for the elementary, middle, mid-high and high school grade levels.

#### ***Educational Program Standards for Elementary Grades***

- Average class size for grades K-5 should not exceed 27 students.
- Special Education for students may be provided in a self-contained classroom. The practical capacity for these classrooms is 15 students.
- All students will be provided music instruction in a separate classroom.
- Students may have a 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, Mid-High and High Schools***

- Class size for secondary grade (6-12) regular classrooms should not exceed 30 students. The District assumes a practical capacity for high school, mid-high and middle school classrooms of 30 students.
- Special Education for students may be provided in a self-contained classroom. The practical capacity for these classrooms is 15 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 workspace during planning periods, 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 83% at the high school, mid-high and middle school levels.
- Some Special Education services for students will 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.
- Program Specific Classrooms:
  - Music
  - Drama
  - Art
  - Physical Education
  - Family and Consumer Sciences
  - Career and Technical Education
- Optimum design capacity for new middle schools is 750 students. However, actual capacity of individual schools may vary depending on the educational programs offered.
- Optimum design capacity for new high schools is 1500 students. However, actual capacity of individual schools may vary depending on the educational programs offered.

**Minimum Educational Service Standards**

The Lake Stevens School District will evaluate student housing levels based on the District as a whole system and not on a school by school or site by site basis. This may result in portable classrooms being used as interim housing, attendance boundary changes or other program

**Table 3-1  
Classrooms Exceeding  
Educational Service Standards**

<u>School</u>	<u>Grade Span</u>	<u>Classrooms</u>	<u>Classrooms Exceeding Class Size Guidelines</u>
Glenwood Elementary	K-5	27	7
Highland Elementary	K-5	26	6
Hillcrest Elementary	K-5	26	9
Mt. Pilchuck Elementary	K-5	25	2
Skyline Elementary	K-5	24	0
Sunnycrest Elementary	K-5	27	8
Lake Stevens Middle	6-7	27	11
North Lake Middle	6-7	39	24
Cavelero Mid-High	8-9	62	3
Lake Stevens High School	10-12	61	53
<b>Total</b>		<b>344</b>	<b>123</b>

changes to balance student housing across the system as a whole.

The Lake Stevens School District has set minimum educational service standards based on several criteria. Exceeding these minimum standards will trigger significant changes in program delivery. If there are 28 or more students per classroom in a majority of K-5 classrooms or 31 or more students in a majority of 6-12 classrooms, the minimum standards have not been met.

Table 3-1 compares Educational Service Standards to the actual experience for the current school year. It should be noted that the minimum educational standard is just that, a minimum, and not the desired or accepted operating standard. Also, portables are used to accommodate students within District standards, but are not considered a permanent solution. (See Chapter 4).

## SECTION 4: CAPITAL FACILITIES INVENTORY

### Capital Facilities

Under GMA, public entities are required to inventory capital facilities used to serve the existing populations. 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. 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 section provides an inventory of capital facilities owned and operated by the Lake Stevens School District including schools, 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 Section 3). A map showing locations of District school facilities is provided as Figure 1.

### Schools

The Lake Stevens School District includes: six elementary schools grades K-5, two middle schools grades 6-7, one mid-high school grades 8-9, one high school grades 10-12, and an alternative K-12 home school partnership program (HomeLink).

**Table 1 – School Capacity Inventory**

School Name	Site Size (acres)	Bldg. Area (Sq. Ft.)	Teaching Stations SPED	Teaching Stations Regular	Perm. Student Capacity*	Capacity with Portables	Year Built or Last Remodel	Potential for Expansion of Perm. Facility
<b>Elementary Schools</b>								
Glenwood Elementary	9	42,673	2	27	513	621	1992	No
Hillcrest Elementary	15	49,735		26	549	711	2008	No
Highland Elementary	8.7	49,727		26	512	620	1999	No
Mt. Pilchuck Elementary	22	49,833	4	25	501	582	2008	No
Skyline Elementary	15	42,673	3	24	513	621	1992	No
Sunnycrest Elementary	15	46,970		27	549	738	2009	No
<b>Total</b>	<b>84.7</b>	<b>281,611</b>	<b>9</b>	<b>155</b>	<b>3,137</b>	<b>3,893</b>		
<b>Middle Schools</b>								
Lake Stevens Middle School	25	86,374	4	27	684	924	1996	No
North Lake Middle School	15	90,323		39	751	991	2001	No
<b>Total</b>	<b>40</b>	<b>176,697</b>	<b>4</b>	<b>66</b>	<b>1,435</b>	<b>1,915</b>		
<b>Mid-High</b>								
Cavelero Mid-High School	37	224,694	3	62	1,418	1,418	2007	Yes
<b>Total</b>	<b>37</b>	<b>224,694</b>	<b>3</b>	<b>62</b>	<b>1,418</b>	<b>1,418</b>		
<b>High Schools</b>								
Lake Stevens High School	38	207,195	8	61	1,526	2,036	2008	Yes
<b>Total</b>	<b>38</b>	<b>207,195</b>	<b>8</b>	<b>61</b>	<b>1,526</b>	<b>2,036</b>		
<b>Other</b>								
HomeLink (K-12 Homeschool Program)	Housed at North Lake MS							

Source: Lake Stevens School District

\* Note: Student Capacity figure is exclusive of portables and adjustments for special programs.



number of teaching stations within each building and the space requirements of the District's adopted education program. These capacity calculations were used to establish the District's baseline capacity and determine future capacity needs based on projected student enrollment. The school capacity inventory is summarized in Table 4-1.

Relocatable classrooms (portables) are not viewed by the District as a solution for housing students on a permanent basis. Therefore, these facilities were not included in the permanent school capacity calculations provided in Table 4-1.

**Leased Facilities**

The District does not lease any permanent classroom space.

**Relocatable Classroom Facilities (Portables)**

Portables are used as interim classroom space to house students until funding can be secured to construct permanent classroom facilities. Portables are not viewed by the District as a solution for housing students on a permanent basis. The Lake Stevens School District currently uses 66 portable classrooms at various school sites throughout the District to provide interim capacity for K-12 students. In addition, 14 portable classrooms are used to accommodate the Early Learning Center, which is not a K-12 program.

**Table 4-2 -- Portables**

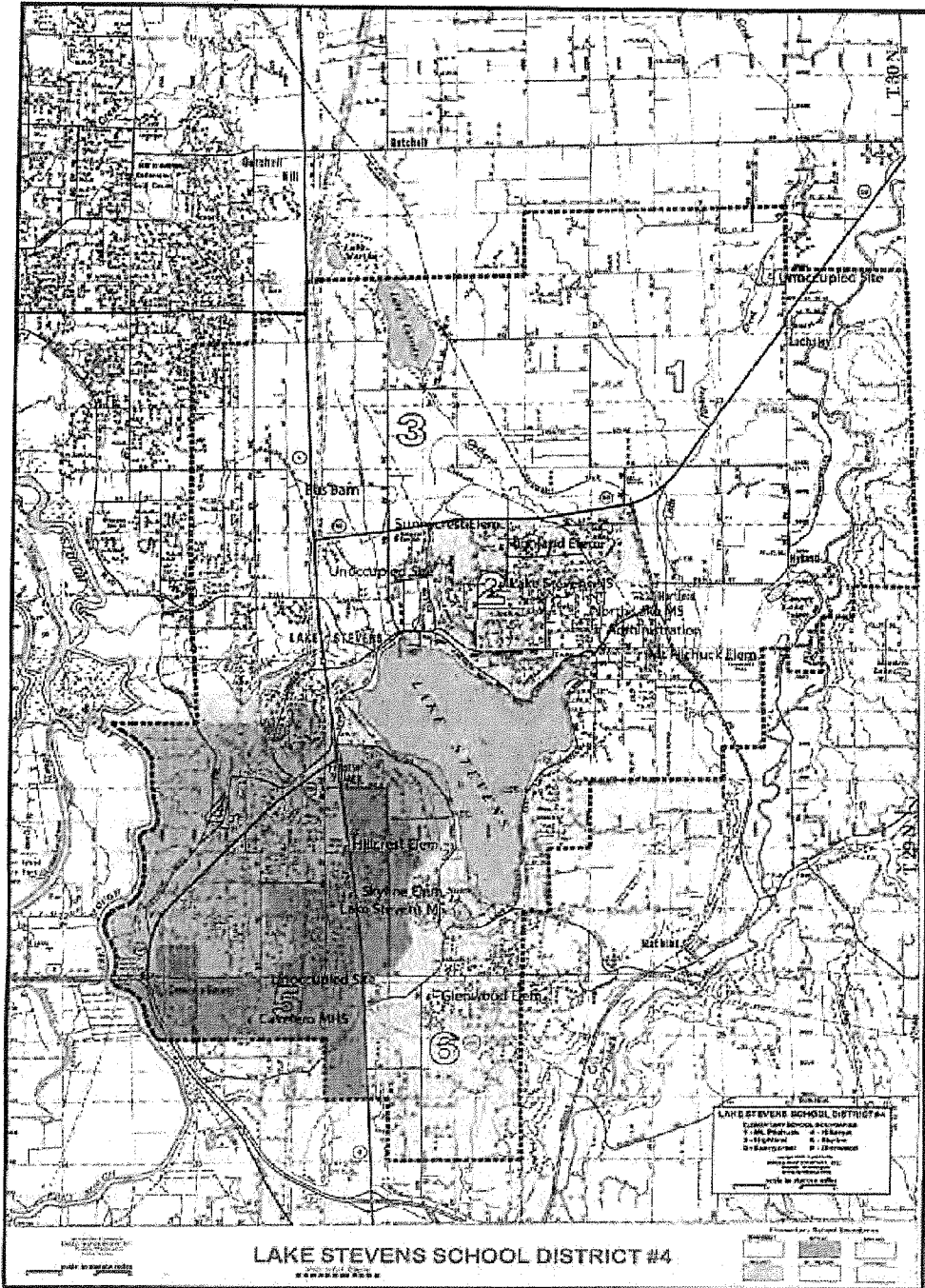
School Name	Portable Classrooms	Capacity in Portables	Portable ft <sup>2</sup>
<b>ELEMENTARY</b>			
Glenwood	4	108	3,584
Hillcrest	8	162	5,376
Highland	6	162	5,376
Mt. Pilchuck	4	81	2,688
Skyline	4	108	3,584
Sunnycrest	7	189	6,272
Total	33	810	26,880
<b>MIDDLE</b>			
Lake Stevens Middle	8	240	7,168
North Lake Middle	8	240	7,168
Total	16	480	14,336
<b>MID-HIGH</b>			
Cavelero Mid-High			-
Total			
<b>HIGH</b>			
Lake Stevens High School	17	510	15,232
Total	17	510	15,232
District K-12 Total	66	1,800	56,448
<b>OTHER</b>			
Early Learning Center	14	350	12,544
Non K-12 Total	14	350	12,544

A typical portable classroom can provide capacity for a full-size class of students. Current use of portables throughout the District is summarized in Table 4-2.

In addition to the portables listed above, the District purchased a portable in 2005 to house the Technology Department, a District-wide support team. The portable is located at North Lake Middle School, across from the District Administration Office. It will not add space for interim student housing.

The District will continue to purchase or move existing portables, as needed, to cover the gap between the time that families move into new residential developments and the time the District is able to complete construction on permanent school facilities. Some of the District's existing portables are beyond their serviceable age and are no longer able to be moved. Upon completion of additional school facilities, the probability exists these units will be demolished.

Figure 1 – Map of District Facilities



### **Support Facilities**

In addition to schools, the Lake Stevens School District owns and operates additional facilities that provide operational support functions to the schools. An inventory of these facilities is provided in Table 4-3.

**Table 4-3 – Support Facilities**

<b>Facility</b>	<b>Site Acres</b>	<b>Building Area (sq.ft.)</b>
Education Service Center	1.4	13,700
Grounds	1.0	3,000
Maintenance	1.0	6,391
Transportation	6.0	17,550
<b>Total</b>	<b>9.4</b>	<b>40,641</b>

### **Land Inventory**

The Lake Stevens School District owns six undeveloped sites described below:

Ten acres located in the northeast area of the District (Lochsloy area), west of Highway 92. This site will eventually be used for an elementary school (beyond the year 2019). It is presently used as an auxiliary sports field.

An approximately 35-acre site northwest of the intersection of Highway 9 and Soper Hill Road, bordered by Lake Drive on the east planned for use as a middle school site.

A parcel of approximately 23 acres located at 20<sup>th</sup> Street SE and 83<sup>rd</sup> Street. This property was donated to the School District for an educational facility. The property is encumbered by wetlands and easements, leaving less than 10 available acres (not considered sufficient for an elementary school site).

A 5.4 acre parcel located at 20<sup>th</sup> Street SE and 83<sup>rd</sup> Street that has been used as an access to the mid-high site.

A 20 ft. x 200 ft. parcel located on 20<sup>th</sup> Street SE has been declared surplus by the Lake Stevens School Board and will be used in exchange for dedicated right-of-way for Cavelero Mid-High.

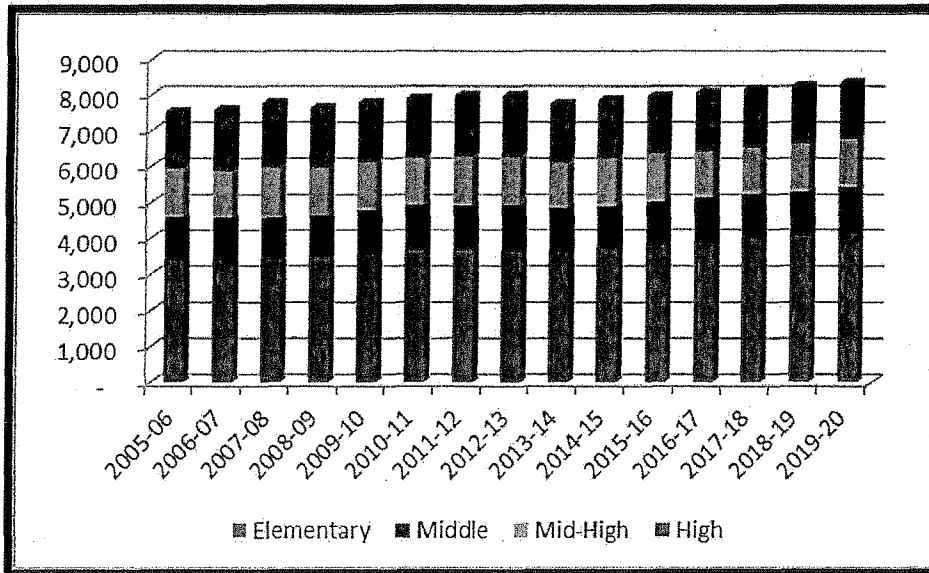
A 2.42 acre site (Jubb Field), located in an area north of Highway #92, is used as a small softball field. It is not of sufficient size to support a school.

## SECTION 5: STUDENT ENROLLMENT TRENDS AND PROJECTIONS

### *Historic Trends and Projections*

Student enrollment in the Lake Stevens School District remained relatively constant between 1973 and 1985 (15%) and then grew significantly from 1985 through 2005 (approximately 120%). Between October 2008 and October 2013, student enrollment increased by 479 FTE students, approximately 7%. Overall there was a 2% decline countywide during this period. The October 1, 2013 enrollment was 7,759 student FTEs, an increase of 118 students (1.6%) over October 1, 2011, the last CFP reporting period. The District has been, and is projected to continue to be one of the fastest growing districts in Snohomish County based on the OFM-based population forecast. Population is estimated to rise from 41,238 in 2013 to over 61,000 in Year 2035.

**Figure 2 – Lake Stevens School District Enrollment Projection**



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 projections. Monitoring birth rates in Snohomish 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.

	Population	FTE Student Enrollment (Actual)	Student/ Population Ratio (Updated)
2000	29,888	6,305	21.1%
2001	30,897	6,633	21.5%
2002	31,906	6,800	21.3%
2003	32,914	6,996	21.3%
2004	33,923	7,109	21.0%
2005	34,932	7,299	20.9%
2006	35,941	7,240	20.1%
2007	36,950	7,257	19.6%
2008	37,959	7,307	19.2%
2009	38,968	7,433	19.1%
2010	39,977	7,568	18.9%
2011	40,248	7,640	19.0%
2012	40,726	7,655	18.8%
2013	41,238	7,759	18.8%
2014	42,142	7,860	18.70%
2015	43,047	7,959	18.50%
2016	43,951	8,055	18.30%
2017	44,856	8,150	18.20%
2018	45,760	8,242	18.00%
2019	46,665	8,331	17.90%

For its planning purposes, the District forecasts enrollments using the Ratio method, which measures FTE enrollment as a percentage of population. Table 5-1 shows this ratio from 2000 to 2013 based on official census and county population estimates adopted in 2012 by the Snohomish County Tomorrow Steering Committee and Snohomish County Council. Enrollments are based on District records of actual FTE enrollments.

The future enrollment forecasts (2014-2019) by the Office of the Superintendent of Public Instruction (OSPI) were not adopted for use in the District's 2014 CFP update. OSPI methodology uses a modified cohort survival method based on headcount. This method estimates how many students in one year will attend the next grade in the following year. The methodology is explained in Appendix B. OSPI Headcount estimates are found in Table 5-2 and differ from the District's Ratio-based FTE estimates in Table 5-3. The OSPI estimates are too high in the opinion of the District. They would produce a student/population ratio of 19.1% in 2019 when the percentage has been declining consistently since 2001.

At this time, the District has at least one section of for-pay full-day Kindergarten at each of its six elementary schools. However, the majority of Kindergarten students still attend half-day Kindergarten. The District is not yet eligible for state-funded full-day Kindergarten at any of its

schools. As a result, the District will continue to use student full-time equivalent (FTE) numbers for its calculations. The District is aware of the potential requirement, with accompanying state funding, for full-day kindergarten beginning in 2018. This is not considered in this Capital Facilities Plan because the requirement is not officially in place. Should it happen prior to the 2016 update the District may revise its plan accordingly.

In summary, the Lake Stevens School District, using the ratio method, estimates that FTE enrollment will total 8,331 students in 2019. This represents a 7.4% FTE increase over 2013.

Table 5-2 shows future enrollment by grade span. It is based in part on the percentage distribution by OSPI, although the District assumes a slower pace of growth over the next six years. The estimates are based on a more focused analysis of trends that show a similar growth rate at the elementary level, but lower at the higher grade spans.

**Table 5-2 - Projected FTE Enrollment by Grade Span 2013-2019  
Lake Stevens School District - FTE**

Grade Span	2013	2014	2015	2016	2017	2018	2019
Elementary School	3,612	3,710	3,825	3,886	3,992	4,070	4,122
Middle School	1,268	1,216	1,228	1,282	1,276	1,250	1,336
Mid-High School	1,225	1,310	1,321	1,260	1,262	1,307	1,308
High School	1,654	1,623	1,585	1,627	1,620	1,616	1,565
<b>Total</b>	<b>7,759</b>	<b>7,860</b>	<b>7,959</b>	<b>8,055</b>	<b>8,150</b>	<b>8,242</b>	<b>8,331</b>

### **2035 Enrollment Projections**

Although student enrollment projections beyond 2019 are highly speculative, they are useful for developing long-range comprehensive facilities plans. These long-range enrollment projections may also be used in determining future site acquisition needs.

The District projects a 2035 student FTE enrollment of 10,656 based on the "ratio" method. (OSPI does not forecast enrollments beyond 2019). The forecast is based on the County's OFM-based population forecast of 61,136. Assuming the County forecasts are correct, student enrollment will continue to increase through 2035 and the 17.4% ratio is considered reasonable. The 2013 actual ratio was 18.8%. OSPI has forecasted a decline in the student/population ratio. The 2035 assumption reflects this ratio decline.

**Table 5-3 - Projected 2035 Enrollment**

Grade Span	2035
Elementary School	5,272
Middle School	1,709
Mid-High School	1,673
High School	2,002
<b>Total</b>	<b>10,656</b>

The 2035 estimate represents a 37% increase over 2013 enrollment levels. The total enrollment estimate was broken down by grade span to evaluate long-term site acquisition needs for elementary, middle school, mid-high school and high school facilities. Enrollment by grade span was determined based on recent and projected enrollment trends at the elementary, middle, mid-high and high school levels.

Should projected enrollment materialize as described in Table 5-3, it is estimated that the District would require an additional 58 classrooms at the elementary level, 10 classrooms at the middle school level, 13 classrooms at the mid-high level and 27 classrooms at the high school level.

These additional classrooms could take the form of relocatable classrooms (portables)<sup>3</sup>, additional classrooms at existing schools or new campuses. In addition, it is possible that the District would require additional support facilities, like a maintenance building, technology center or additional bus service facilities, to serve the projected enrollment.

Again, the 2035 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 Capital Facilities Plan.

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<sup>3</sup> Portable classroom space is not considered a part of permanent capacity

## SECTION 6: CAPITAL FACILITIES PLAN

### ***Existing Deficiencies***

Current enrollment at each grade level is identified in Table 5-2. The District currently (2013) has 475 unhoused students at the elementary level and 128 unhoused students at the high school level. It has excess capacity at the middle school (167) and mid-high (193) school levels.

### ***Facility Needs (2014-2019)***

Projected available student capacity was derived by subtracting projected FTE student enrollment from 2014 permanent school capacity (excluding portables) for each of the six years in the forecast period (2014-2019). The District's enrollment projections in Table 5-2 have been applied to the existing capacity (Table 4-1). If no capacity improvements were to be made by the year 2019 the District would be over capacity at the elementary level by 985 students, 110 students at mid-high and 39 at the high school level. The middle school level would have excess capacity of 99 students.

Projected future capacity needs are depicted on Table 6-1. This table compares actual future space needs with the portion of those needs that are "growth related." RCW 82.02 and SCC 30.66C mandate that new developments cannot be assessed impact fees to correct existing deficiencies. Thus, any capacity deficiencies existing in the District in 2013 must be deducted from the total projected deficiencies before impact fees are assessed. The percentage figure shown in the last column of Table 6-1 is the "growth related" percentage of overall deficiencies that is used to calculate impact fees.

**Table 6-1 - Projected Additional Capacity Needs 2013 – 2019**

Grade Span	2013	2014	2015	2016	2017	2018	2019	2013-2019
<b>Elementary (K-5)</b>								
Capacity Deficit	(475)	(573)	(688)	(749)	(855)	(933)	(985)	
Growth Related		(98)	(213)	(274)	(380)	(458)	(510)	51.78%
<b>Middle School (6-7)</b>								
Capacity Deficit	167	219	207	153	159	185	99	
Growth Related		52	40	(14)	(8)	18	(68)	68.69%
<b>Mid-High (8-9)</b>								
Capacity Deficit	193	108	97	158	156	111	110	
Growth Related		(85)	(96)	(35)	(37)	(82)	(83)	75.73%
<b>High School 10-12)</b>								
Capacity Deficit	(128)	(97)	(59)	(101)	(94)	(90)	(39)	
Growth Related		31	69	27	34	38	89	0.00%

Table 6-1 does not consider the construction of a new elementary school. The District's six-year capital improvement plan (Table 6-3) includes the project. Deficiencies would remain at three grade levels (not Middle School), although the elementary deficit would drop to 485 with a new elementary school.



**Forecast of Future Facility Needs through 2035**

Additional elementary, middle, mid-high and high school classroom space will need to be constructed between 2015 and 2035 to meet the projected student population increase. The District will have to purchase additional school sites to facilitate growth during this time frame.

By the end of the six-year forecast period (2019), additional permanent student capacity will be needed as follows:

**Table 6-2 – 2019 Additional Capacity Need**

<b>Grade Level</b>	<b>2013 Capacity</b>	<b>2019 Capacity</b>	<b>2019 Additional Capacity Needed</b>
Elementary	3,137	3,637	485*
Middle School	1,435	1,435	
Mid-High	1,418	1,418	
High School	1,526	1,526	39
<b>Total</b>	<b>7,516</b>	<b>8,016</b>	<b>524</b>

\*Assumes construction of new 500-student elementary school in 2019

These figures reflect a planned elementary school improvement by the District by 2019.

**Planned Improvements (2013 - 2019)**

The following is a brief outline of those projects likely needed to accommodate un-housed students in the Lake Stevens School District through the Year 2019 based on OSPI enrollment projections.

**Elementary Schools:** Based upon current enrollment estimates, elementary student population will increase to the level of requiring a new elementary school. The construction of a new elementary school is projected by 2019 and will require placing a bond issue before the electorate. If a school is built, there would be 485 unhoused students, a number less than the District’s standard of 500-student capacity for elementary schools.

**Middle Schools:** With the move of the 8<sup>th</sup> grade to the new Cavelero Mid-High School, there is currently sufficient student capacity.

**Mid-High School:** Cavelero Mid-High, opened in 2007, houses grades 8 & 9.

**High Schools:** The high school houses grades 10-12. There will be an estimated 39 unhoused students at this level. Additional classroom space will be accommodated with portables.

**Interim Classroom Facilities (Portables):** Additional portables will be purchased in future years, as needed. However, it remains a District goal to house all students in permanent facilities.

**Site Acquisition and Improvements:** An additional elementary school site will be needed in an area where student growth is taking place. The 10-acre Lochsloy property is in the far corner of the district, not in an area of growth and will not meet this need. Affordable land suitable for school facilities will be difficult to acquire. Funds for the purchase of land suitable for an elementary facility will have to be included in a bond issue. At this time a bond issue has not been scheduled for placement before the District electorate.

### **Support Facilities**

The District does not project the need for additional support facilities during period of the six-year finance plan.

### ***Capital Facilities Six-Year Finance Plan***

The Six Year Finance Plan shown on Table 6-3 demonstrates how the District intends to fund new construction and improvements to school facilities for the years 2014-2019. The financing components include bond issue(s), State match funds, school mitigation and impact fees.

The financing plan separates projects and portions of projects that add capacity from those that do not, since the latter are generally not appropriate for impact fee funding. The financing plan and impact fee calculation formula also differentiate between projects or portions of projects that address existing deficiencies (ineligible for impact fees) and those which address future growth related needs.

**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. A capital improvements bond for \$65,500,000 was approved by the electorate in February 2005. These funds were used to construct the Cavelero Mid-High School, the modernization of Mt. Pilchuck, Sunnycrest and Hillcrest Elementary schools, Lake Stevens High School 500 Building and the District athletic facility.

If actions by state, county and local jurisdictions determined that impact fees were not available in the future to fund growth-related projects, it would be necessary for the District to seek additional funds through voter approved general obligation bonds coupled with available state match.

The total costs of the growth related projects outlined in Table 6-3 represent recent and current bids per information obtained through OSPI, the District's architect and neighboring school districts that have recently or are planning to construct classroom space. An inflation factor of 2.5% per year has been applied out to 2019.

**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 predominately 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 matching funds for a specific capital project. To qualify, a project must first meet State-established criteria of need. This is determined by a formula that

specifies the amount of square footage the State will help finance to house the enrollment projected for the district. If a project qualifies, it can become part of a State prioritization system. This system prioritizes allocation of available funding resources to school districts based on a formula which calculates district assessed valuation per pupil relative to the whole State assessed valuation per pupil to establish the percent of the total project cost to be paid by the State for eligible projects.

State Match Funds can only be applied to major school construction projects. Site acquisition and minor 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 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). When the State share is finally disbursed (without accounting for escalation) the future District project is partially reimbursed.

Because of the method of computing State Match, the District has historically received approximately 39% of the actual cost of school construction in state matching funds. For its 2014 CFP, the District assumes a 40% match.

**School 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.

Impact fees have been calculated utilizing the formula in Snohomish County Ordinance, Chapter 30.66C. 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 or relocate temporary facilities (portables). 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 owner of a dwelling unit. The costs of projects that do not add capacity or which address existing deficiencies have been eliminated from the variables used in the calculations.

Since 2012, the Lake Stevens School District has collected and expended the following impact fees:

	<u>Collections</u>	<u>Expenditures</u>
2014	\$ 384,044.00	\$ 232,450.92
2013	\$1,005,470.00	\$ 22,304.10
2012	\$1,526,561.00	\$ -
2011	\$ 734,392.00	\$ -
2010	\$1,057,088.00	\$ 3,600,000.00
2009	\$1,638,290.00	\$ -

The law allows ten years for collected dollars to be spent.

By ordinance, new developments cannot be assessed impact fees to correct existing deficiencies. Thus, existing capacity deficiencies must be deducted from the total projected deficiencies in the calculation of impact fees.

**Table 6-3 – Capital Facilities Plan 2014-2019**

		Estimated Project Cost by Year - in \$millions					Total	Local Cost*	State Match
		2014	2015	2016	2017	2018	2019		
<b>Improvements Adding Student Capacity</b>									
<b>Elementary</b>									
Site Acquisition						\$ 1.50	\$ 1.50	\$ 1.50	
	Acres					15	15		
	Capacity Addition					500			
Construction Cost						\$19.95	\$19.95	\$ 11.27	\$8.68
	Capacity Addition						500		
<b>Middle</b>							-		
Site Acquisition							-		
	Acres						-		
	Capacity Addition						-		
Construction Cost							-		
	Capacity Addition						-		
<b>Mid-High</b>							-		
Site Acquisition							-		
	Acres						-		
	Capacity Addition						-		
Construction Cost							-		
	Capacity Addition						-		
<b>High School</b>							-		
Site Acquisition							-		
	Acres						-		
	Capacity Addition						-		
Construction Cost							-		
	Capacity Addition						-		
<b>Total Cost</b>						\$21.45	\$21.45	\$12.77	\$8.68
<b>Portables Purchased as Necessary at \$110,000 per unit</b>									
<b>Improvements Not Adding Student Capacity</b>							-	Local	Match
<b>Elementary</b>							-		
Construction Cost							-		
<b>Middle</b>							-		
Construction Cost							-		
<b>Mid-High</b>							-		
Construction Cost							-		
<b>High School</b>							-		
Construction Cost							-		
<b>District-wide Improvements</b>							-		
Construction Cost							-		
<b>Totals</b>							-	Local	Match
Elementary (including land acquisition)						\$21.45	\$21.45	\$12.77	\$8.68
Middle							-		
Mid-High							-		
High School							-		
District Wide							-		
<b>Annual Total</b>						\$21.45	\$21.45	\$12.77	\$8.68

\* Local Cost includes amounts currently available to the District, future uncollected impact fees and bonds and levies not yet approved.

The financing plan separates projects and portions of projects that add capacity from those that do not, since the latter are generally not appropriate for impact fee funding. The financing plan and impact fee calculation also differentiate between projects or portions of projects that address existing deficiencies (ineligible for impact fees) and those which address future growth-related needs. From this process, the District can develop a plan that can be translated into a bond issue package for submittal to District voters, if deemed appropriate.

Table 6-4 presents an estimate of the capacity impacts of the proposed capital construction projects.

## **Calculation Criteria**

### **1. Site Acquisition Cost Element**

**Site Size:** The site size given the optimum acreage for each school type based on studies of existing school sites OSPI standards. Generally, districts will require 11-15 acres for an elementary school; 25-30 acres for a middle school or junior high school; and 40 acres or more for a high school. Actual school sites may vary in size depending on the size of parcels available for sale and other site development constraints, such as wetlands. It also varies based on the need for athletic fields adjacent to the school along with other specific planning factors.

This space for site size on the Variable Table contains a number only when the particular district plans to acquire additional land during the six-year planning period, 2014 - 2019. As noted previously, the District will need to acquire an additional elementary school site between 2014 and 2019. The District acquired a site for an elementary school and a high school in 2001.

**Average Land Cost Per Acre:** The cost per acre is based on estimates of land costs within the District, based either on recent land purchases or by its knowledge of prevailing costs in the particular real estate market. Prices per acre will vary throughout the County and will be heavily influenced by the urban vs. rural setting of the specific district and the location of the planned school site. The Lake Stevens School District estimates its vacant land costs to be \$100,000 per acre. Until a site is actually located for acquisition, the actual purchase price is unknown. Developed sites, which sometimes must be acquired adjacent to existing school sites, can cost well over \$100,000 per acre.

**Facility Design Capacity (Student FTE):** Facility design capacities reflect the District's optimum number of students each school type is designed to accommodate. These figures are based on actual design studies of optimum floor area for new school facilities. The Lake Stevens School District designs new elementary schools to accommodate 500 students, new middle schools 750 students and new high schools 1,500 students.

**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 detached dwellings and multiple-family dwellings. Multiple-family dwellings, which may be rental or owner-occupied units within structures containing two or more dwelling units, were broken out into one-bedroom and two-plus bedroom units.

**Table 6-4 – Projected Growth Related Capacity Surplus (Deficit)  
After Programmed Improvements**

	<b>Elementary</b>	<b>Middle</b>	<b>Mid-High</b>	<b>High School</b>
<b>2013</b>				
Existing Capacity	3,137	1,435	1,418	1,526
Programmed Improvement Capacity				
Capacity After Improvement	3,137	1,435	1,418	1,526
Current Enrollment	3,612	1,268	1,225	1,654
Surplus (Deficit) After Improvement	(475)	167	193	(128)
<b>2014</b>				
Existing Capacity	3,137	1,435	1,418	1,526
Programmed Improvement Capacity	0	0	0	0
Capacity After Improvement	3,137	1,435	1,418	1,526
Projected Enrollment	3,710	1,216	1,310	1,654
Surplus (Deficit) After Improvement	(573)	219	108	(97)
<b>2015</b>				
Existing Capacity	3,137	1,435	1,418	1,526
Programmed Improvement Capacity	0	0	0	0
Capacity After Improvement	3,137	1,435	1,418	1,526
Projected Enrollment	3,825	1,228	1,321	1,585
Surplus (Deficit) After Improvement	(688)	207	97	(59)
<b>2016</b>				
Existing Capacity	3,137	1,435	1,418	1,526
Programmed Improvement Capacity	0	0	0	0
Capacity After Improvement	3,137	1,435	1,418	1,526
Projected Enrollment	3,886	1,282	1,260	1,627
Surplus (Deficit) After Improvement	(749)	153	158	(101)
<b>2017</b>				
Existing Capacity	3,137	1,435	1,418	1,526
Programmed Improvement Capacity	0	0	0	0
Capacity After Improvement	3,137	1,435	1,418	1,526
Projected Enrollment	3,992	1,276	1,262	1,620
Surplus (Deficit) After Improvement*	(855)	159	156	(94)
<b>2018</b>				
Existing Capacity	3,137	1,435	1,418	1,526
Programmed Improvement Capacity	0	0	0	0
Capacity After Improvement	3,137	1,435	1,418	1,526
Projected Enrollment	4,070	1,250	1,307	1,616
Surplus (Deficit) After Improvement*	(933)	185	111	(90)
<b>2019</b>				
Existing Capacity	3,137	1,435	1,418	1,526
Programmed Improvement Capacity	500	0	0	0
Capacity After Improvement	3,637	1,435	1,418	1,526
Projected Enrollment	4,122	1,336	1,308	1,565
Surplus (Deficit) After Improvement	(485)	99	110	(39)

Pursuant to a requirement of Chapter 30.66C, each school district was required to conduct student generation studies within their jurisdictions. This was done to “localize” generation rates for purposes of calculating impact fees. A description of this methodology is contained in Appendix D.

The student generation rates for the Lake Stevens School District are shown on Table 6-5.

**Table 6-5 – Student Generation Rates**

	<b>Elementary</b>	<b>Middle</b>	<b>Mid-High</b>	<b>High</b>	<b>Total</b>
Single Family	0.332	0.111	0.092	0.118	0.653
<i>Multiple Family, 1 Bedroom</i>	--	--	--	--	--
Multiple Family, 2+ Bedroom	0.169	0.038	0.063	0.055	0.325

The District expects that .653 students will be generated from each new single family home in the District and that .325 students will be generated from each new two-plus bedroom multi-family unit. No survey samples were found for Multiple Family 1-Bedroom units.

## **2. School Construction Cost Variables**

**Additional Building Capacity:** These figures are the actual capacity additions to the Lake Stevens School District that will occur as a result of improvements listed on Table 6-3 (Capital Facilities Plan).

**Current Facility Square Footage:** These numbers are taken from Tables 4-1 and 4-2. They are used in combination with the “Existing Portables Square Footage” to apportion the impact fee amounts between permanent and temporary capacity figures in accordance with Chapter 30.66C.

**Estimated Facility Construction Cost:** The estimated facility construction cost is based on planned costs or on actual costs of recently constructed schools. The facility cost is the total cost for construction projects as defined on Table 6-3, including only capacity related improvements and adjusted to the “growth related” factor. Projects or portions of projects that address existing deficiencies (which are those students who are un-housed as of October 2013) are not included in the calculation of facility cost for impact fee calculation.

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.

## **3. Relocatable Facilities Cost Element**

Impact fees may be collected to allow acquisition of portables to help relieve capacity deficiencies on a temporary basis. The cost allocated to new development must be growth related and must be in proportion to the current permanent versus temporary space allocations by the district.

Existing Units: This is the total number of existing portables in use by the district as reported on Table 4-2.

New Facilities Required Through 2019: This is the estimated number of portables to be acquired.

Cost Per Unit: This is the average cost to purchase and set up a portable. It includes site preparation, but does not include moveable furnishings in the unit.

Relocatable Facilities Cost: This is simply the total number of needed units multiplied by the cost per unit. The number is then adjusted to the "growth-related" factor.

For districts, such as Lake Stevens, that do not credit any portable capacity to the permanent capacity total (see Table 4-1), this number is not directly applicable to the fee calculation and is for information only. The impact fee allows a general fee calculation for portables; however the amount is adjusted to the proportion of total square footage in portables to the total square footage of permanent and portable space in the district.

Where districts do allow a certain amount of portable space to be credited to permanent capacity, that amount would be adjusted by the "growth-related" factor, because it is considered to be permanent space.

#### **4. Fee 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 \$200.40 (January 2014).

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 the District's 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. The District will continue to use a state match percentage of 40% vs. the historical percentage of 39%.

#### **5. Tax Credit Variables**

Under Title 30.66C, a credit is granted to new development to account for taxes that will be paid to the school district over the next ten years. The credit is calculated using a "present value" formula.

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 assumed interest rate is 4.38%.



Levy Rate (in mills): The Property Tax Levy Rate (for bonds) is determined by dividing the District's average capital property tax rate by one thousand. The current levy rate for the Lake Stevens School District is 0.00159.

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 averaged assessed values are 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 \$232,647 for single-family detached residential dwellings; \$64,444 for one-bedroom multi-family units, and \$94,676 for two or more bedroom multi-family units.

## **6. Adjustments**

Growth Related Capacity Percentage: This is explained in preceding sections.

Discount: In accordance with Chapter 30.66C, all fees calculated using the above factors are to be reduced by 50%.

These variables and calculations are shown in Table 6-6.

Table 6-6 - Impact Fee Variables

Criteria	Elementary	Middle	Mid-High	High
Single Family	0.332	0.111	0.092	0.118
Multiple Family 1 Bdrm				
Multiple Family 2 Bdrm	0.169	0.038	0.063	0.055
Site Needs (acres)	15.0	-	-	-
Growth Related	7.8	-	-	-
Cost Per Acre	\$100,000.00	\$100,000.00	\$100,000.00	\$100,000.00
Additional Capacity	500	-	-	-
Growth Related	258	0	0	0
Estimated Facility Construction Cost	\$21,700,000	\$0	\$0	\$0
Growth Related	\$11,235,532	\$0	\$0	\$0
Additional Capacity	500	-	-	-
Growth Related	258	-	-	-
Current Facility Square Footage	281,611	176,697	224,694	207,195
Relocatable Facilities Cost	\$110,000	\$110,000	\$110,000	\$110,000
Growth Related	\$56,954	\$75,555	\$83,302	\$0
Relocatable Facilities Capacity/Unit	27	30	30	25
Growth Related	13	20	22	-
Existing Portable Square Footage	29,568	14,336	-	15,232
Boeckh Index	\$200.40	\$200.40	\$200.40	\$200.40
School Space per Student (OSPI)	90	117	117	130
State Match Percentage	40.00%	40.00%	40.00%	40.00%
Interest Rate	4.38%	4.38%	4.38%	4.38%
Loan Payoff (Years)	10	10	10	10
Property Tax Levy Rate (Bonds)	0.00159	0.00159	0.00159	0.00159
Average AV per DU Type	\$232,647	\$64,444		\$94,676
	(Single Fam.)	(MF 1 bdrm)		(MF 2 bdrm)
Growth-Related Factor	51.78%	68.69%	75.73%	0.00%
Discount	50%	50%	50%	50%

**Proposed Impact Fee Schedule**

Using the variables and formula described, impact fees proposed for the Lake Stevens School District are summarized in Table 6-7 (refer to Appendix A for worksheets).

**Table 6-7 - Calculated Impact Fees**

<b>Housing Type</b>	<b>Impact Fee Per Unit</b>
Single Family Detached	\$9,360
One Bedroom Apartment	\$0
Two + Bedroom Apartment	\$5,065
Two + Duplex/Townhouse	\$5,065

**50% discount**

<b>Housing Type</b>	<b>Impact Fee Per Unit</b>
Single Family Detached	\$4,680
One Bedroom Apartment	\$0
Two + Bedroom Apartment	\$2,532
Two + Duplex/Townhouse	\$2,532

Appendix A

Impact Fee Calculation

IMPACT FEE WORKSHEET  
 LAKE STEVNS SCHOOL DISTRICT  
**SINGLE-FAMILY RESIDENTIAL**

**SITE ACQUISITION COST**

acres needed	7.80	x	\$	capacity (#	258	x	student	0.332	=	\$1,004	(elementary)
			100,000	students)			factor				
acres needed	0	x	\$	capacity (#	0	x	student	0.111	=	\$0	(middle)
			100,000	students)			factor				
acres needed	0	x	\$	capacity (#	0	x	student	0.092	=	\$0	(mid-high)
			100,000	students)			factor				
acres needed	0	x	\$	capacity (#	0	x	student	0.118	=	\$0	(high school)
			100,000	students)			factor				
<b>TOTAL SITE ACQUISITION COST</b>										<b>\$1,004</b>	

**SCHOOL CONSTRUCTION COST**

total const. cost	\$11,235,532	/	capacity (#	258	x	student	0.332	=	\$14,458	(elementary)	
			students)			factor					
total const. cost	\$0	/	capacity (#	0	x	student	0.111	=	\$0	(middle)	
			students)			factor					
total const. cost	\$0	/	capacity (#	0	x	student	0.092	=	\$0	(mid-high)	
			students)			factor					
total const. cost	\$0	/	capacity (#	0	x	student	0.118	=	\$0	(high school)	
			students)			factor					
<b>Subtotal</b>										<b>\$14,458</b>	

Total Square Feet		/	Total Square Feet		=	
of Permanent Space (District)	890,197		of School Facilities (000)	949,333		93.77%

**TOTAL FACILITY CONSTRUCTION COST** = **\$ 13,557**

**RELOCATABLE FACILITIES COST (PORTABLES)**

Portable Cost	\$ 56,954	/	13	facility size	x	student factor	0.332	=	\$1,455	(elementary)
Portable Cost	\$ 75,555	/	20	facility size	x	student factor	0.111	=	\$419	(middle)
Portable Cost	\$ 83,302	/	22	facility size	x	student factor	0.092	=	\$348	(mid-high)
Portable Cost	\$ -	/	0	facility size	x	student factor	0.118	=	\$0	(high school)
<b>Subtotal</b>										<b>\$2,222</b>

Total Square Feet		/	Total Square Feet		=	
of Portable Space (District)	59,136		of School Facilities (000)	949,333		6.23%

**TOTAL RELOCATABLE COST ELEMENT** = **\$138**

CREDIT AGAINST COST CALCULATION -- MANDATORY

STATE MATCH CREDIT:

BOECKH Index	\$ 200.40	x OSPI Allowance	90.00	x	State Match %	40.00%	x	student factor	0.332	=	\$2,395	(elementary)	
BOECKH Index	\$ 200.40	x OSPI Allowance	117.00	x	State Match %	40.00%	x	student factor	0.111	=		(middle)	
BOECKH Index	\$ 200.40	x OSPI Allowance	117.00	x	State Match %	40.00%	x	student factor	0.092	=		(mid-high)	
BOECKH Index	\$ 200.40	x OSPI Allowance	130.00	x	State Match %	40.00%	x	student factor	0.118	=		(high school)	
TOTAL STATE MATCH CREDIT											=	\$2,395	

TAX PAYMENT CREDIT

[(1+ interest rate	4.38%	)	10	years to pay off bond) - 1]	/	[ interest rate	4.38%	x				
(1 + interest rate	4.38%	)^	10	years to pay off bond ]	x	0.00159	capital levy rate	x				
assessed value	\$232,647								tax payment credit	=	\$	2,944

IMPACT FEE CALCULATION

SITE ACQUISITION COST	\$1,004
FACILITY CONSTRUCTION COST	\$ 13,557
RELOCATABLE FACILITIES COST (PORTABLES)	\$138
(LESS STATE MATCH CREDIT)	(\$2,395)
(LESS TAX PAYMENT CREDIT)	(\$2,944)

FINAL IMPACT FEE PER UNIT	Non-Discounted	50% Discount
	\$9,360	\$4,680

IMPACT FEE WORKSHEET  
 LAKE STEVNS SCHOOL DISTRICT  
**MULTIPLE FAMILY RESIDENTIAL -- 1 BDRM OR LESS**

<b>SITE ACQUISITION COST</b>												
acres needed	7.8	x	\$	/	capacity (#	258	x	student	0	=	\$0	(elementary)
			100,000		students)			factor				
acres needed	0	x	\$	/	capacity (#s	0	x	student	0	=	\$0	(middle)
			100,000		tudents)			factor				
acres needed	0	x	\$	/	capacity (#	0	x	student	0	=	\$0	(mid-high)
			100,000		students)			factor				
acres needed	0	x	\$	/	capacity (#	0	x	student	0	=	\$0	(high school)
			100,000		students)			factor				
<b>TOTAL SITE ACQUISITION COST</b>										=	\$0	
<b>SCHOOL CONSTRUCTION COST</b>												
total const. cost	\$11,235,532	/			capacity (#	258	x	student factor	0	=	\$0	(elementary)
					students)							
total const. cost	\$0	/			capacity (#	0	x	student factor	0	=	\$0	(middle)
					students)							
total const. cost	\$0	/			capacity (#	0	x	student factor	0	=	\$0	(mid-high)
					students)							
total const. cost	\$0	/			capacity (#	0	x	student factor	0	=	\$0	(high school)
					students)							
										Subtotal	\$0	
Total Square Feet			/ Total Square Feet									
of Permanent Space (District)	890,197			of School Facilities (000)		949,333					= 93.77%	
<b>TOTAL FACILITY CONSTRUCTION COST</b>										=	\$ -	
<b>RELOCATABLE FACILITIES COST (PORTABLES)</b>												
Portable Cost	\$	/	13	facility size	x	student factor	0		=	\$0	(elementary)	
	56,954											
Portable Cost	\$	/	20	facility size	x	student factor	0		=	\$0	(middle)	
	75,555											
Portable Cost	\$	/	22	facility size	x	student factor	0		=	\$0	(mid-high)	
	83,302											
Portable Cost	\$	/	0	facility size	x	student factor	0		=		(high school)	
										Subtotal	\$0	
Total Square Feet			/ Total Square Feet									

of Portable Space (District) 59,136 of School Facilities (000) 949,333 = 6.23%  
 TOTAL RELOCATABLE COST ELEMENT = \$0

**CREDIT AGAINST COST CALCULATION -- MANDATORY**

**STATE MATCH CREDIT**

BOECKH Index	<u>\$ 200.40</u>	x OSPI Allowance	<u>90</u>	x State Match %	<u>40.00%</u>	x student factor	<u>0</u>	=	<u>\$0</u>	(elementary)
BOECKH Index	<u>\$ 200.40</u>	x OSPI Allowance	<u>117</u>	x State Match %	<u>40.00%</u>	x student factor	<u>0</u>	=	<u>0</u>	(middle)
BOECKH Index	<u>\$ 200.40</u>	x OSPI Allowance	<u>117</u>	x State Match %	<u>40.00%</u>	x student factor	<u>0</u>	=	<u>0</u>	(mid-high)
BOECKH Index	<u>\$ 200.40</u>	x OSPI Allowance	<u>130</u>	x State Match %	<u>40.00%</u>	x student factor	<u>0</u>	=	<u>0</u>	(high school)

TOTAL STATE MATCH CREDIT = \$0

**TAX PAYMENT CREDIT**

$$\left[ \frac{(1 + \text{interest rate})^{10} - 1}{\text{interest rate}} \right] \times \left[ \text{interest rate} \times 4.38\% \right] \times \text{assessed value}$$

$$\left[ \frac{(1 + \text{interest rate})^{10} - 1}{\text{interest rate}} \right] \times 0.00159 \times \text{assessed value}$$

tax payment credit = \$ (816)

**IMPACT FEE CALCULATION**

SITE ACQUISITION COST	<u>\$0</u>
FACILITY CONSTRUCTION COST	<u>\$0</u>
RELOCATABLE FACILITIES COST (PORTABLES)	<u>\$0</u>
(LESS STATE MATCH CREDIT)	<u>\$0</u>
(LESS TAX PAYMENT CREDIT)	<u>(\$816)</u>

	Non-Discounted	50% Discount
<b>FINAL IMPACT FEE PER UNIT</b>	<b>\$0</b>	<b>\$0</b>



IMPACT FEE WORKSHEET  
LAKE STEVNS SCHOOL DISTRICT

**MULTIPLE FAMILY RESIDENTIAL – 2 BDRM OR MORE**

**SITE ACQUISITION COST**

acres needed	7.8	x	\$ 100,000	/	capacity (#students)	258	x	student factor	0.169	=	\$511	(elementary)
acres needed	0	x	\$ 100,000	/	capacity (#students)	0	x	student factor	0.038	=	\$0	(middle)
acres needed	0	x	\$ 100,000	/	capacity (#students)	0	x	student factor	0.063	=	\$0	(mid-high)
acres needed	0	x	\$ 100,000	/	capacity (#students)	0	x	student factor	0.055	=	\$0	(high school)

TOTAL SITE ACQUISITION COST

= \$511

**SCHOOL CONSTRUCTION COST**

total const. cost	\$11,235,532	/	capacity (# students)	258	x	student factor	0.169	=	\$7,360	(elementary)
total const. cost	\$0	/	capacity (# students)	0	x	student factor	0.038	=	\$0	(middle)
total const. cost	\$0	/	capacity (# students)	0	x	student factor	0.063	=	\$0	(mid-high)
total const. Cost	\$0	/	capacity (# students)	0	x	student factor	0.055	=	\$0	(high school)

\$7,360

Total Square Feet of Permanent Space (District)	890,197	/	Total Square Feet of School Facilities (000)	949,333
--	---------	---	---	---------

= 93.77%

TOTAL FACILITY CONSTRUCTION COST

= \$ 6,901

**RELOCATABLE FACILITIES COST (PORTABLES)**

Portable Cost	\$ 56,954	/	13	facility size	x	student factor	0.169	=	\$740	(elementary)
Portable Cost	\$ 75,000	/	20	facility size	x	student factor	0.038	=	\$143	(middle)
Portable Cost	\$ 83,302	/	22	facility size	x	student factor	0.063	=	\$239	(mid-high)
Portable Cost	\$ -	/	0	facility size	x	student factor	0.055	=		(high school)

Subtotal

\$1,121

Total Square Feet of Portable Space (District)	59,136	/	Total Square Feet of School Facilities (000)	949,333
---	--------	---	---	---------

= 6.23%

TOTAL RELOCATABLE COST ELEMENT

= \$70

**CREDIT AGAINST COST CALCULATION -- MANDATORY**

**STATE MATCH CREDIT**

BOECKH Index	\$ 200.40	x OSPI Allowance	90	x	State Match %	40.00%	x	student factor	0.169	=	\$1,219	(elementary)
BOECKH Index	\$ 200.40	x OSPI Allowance	117	x	State Match %	40.00%	x	student factor	0.038	=		(middle)
BOECKH Index	\$ 200.40	x OSPI Allowance	117	x	State Match %	40.00%	x	student factor	0.063	=		(mid-high)
BOECKH Index	\$ 200.40	x OSPI Allowance	130	x	State Match %	40.00%	x	student factor	0.055	=		(high school)
<b>TOTAL STATE MATCH CREDIT</b>										=	\$1,219	

**TAX PAYMENT CREDIT**

[(1+ interest rate	4.38%	)	10	years to pay off bond) - 1] /	[ interest rate	4.38%	x					
(1 + interest rate	4.38%	)	10	years to pay off bond ] x	0.00159	capital levy rate x						
assessed value	\$94,676									tax payment credit	=	\$ 1,198

**IMPACT FEE CALCULATION**

SITE ACQUISITION COST	\$511
FACILITY CONSTRUCTION COST	\$6,901
RELOCATABLE FACILITIES COST (PORTABLES)	\$70
(LESS STATE MATCH CREDIT)	(\$1,219)
(LESS TAX PAYMENT CREDIT)	(\$1,198)

<b>FINAL IMPACT FEE PER UNIT</b>	Non-Discounted	50% Discount
	\$5,065	\$2,532

Appendix B

OSPI Enrollment Forecasting Methodology

## OSPI PROJECTION OF ENROLLMENT DATA

### Cohort-Survival or Grade-Succession Technique

Development of a long-range school-building program requires a careful forecast of school enrollment indicating the projected number of children who will attend school each year. The following procedures are suggested for determining enrollment projections:

1. Enter in the lower left corner of the rectangle for each year the number of pupils actually enrolled in each grade on October 1, as reported on the October Report of School District Enrollment, Form M-70, column A. (For years prior to October 1, 1965, enter pupils actually enrolled as reported in the county superintendent's annual report, Form A-1.)

2. In order to arrive at enrollment projections for kindergarten and/or grade one pupils, determine the percent that the number of such pupils each year was of the number shown for the immediately preceding year. Compute an average of the percentages, enter it in the column headed "Ave. % of Survival", and apply such average percentage in projecting kindergarten and/or grade one enrollment for the next six years.

3. For grade two and above determine the percent of survival of the enrollment in each grade for each year to the enrollment in the next lower grade during the preceding year and place this percentage in the upper right corner of the rectangle. (For example, if there were 75 pupils in actual enrollment in grade one on October 1, 1963, and 80 pupils were in actual enrollment in grade two on October 1, 1964, the percent of survival would be  $80/75$ , or 106.7%. If the actual enrollment on October 1, 1965 in grade three had further increased to 100 pupils, the percent of survival to grade three would be  $100/80$  or 125 %.). Compute an average of survival percentages for each year for each grade and enter it in the column, "Ave. % of Survival".

In order to determine six-year enrollment projections for grade two and above, multiply the enrollment in the next lower grade during the preceding year by 7 the average percent of survival. For example, if, on October 1 of the last year of record, there were 100 students in grade one and the average percent of survival to grade two was 105,

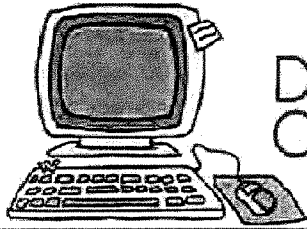
then 105% of 100 would result in a projection of 105 students in grade two on October 1 of the succeeding year.

4. If, after calculating the "Projected Enrollment", there are known factors which will further influence the projections, a statement should be prepared showing the nature of those factors, involved and their anticipated effect upon any portion of the calculated projection.

\*Kindergarten students are projected based on a regression line.

Appendix C

Student Generation Rate Methodology



**DOYLE  
CONSULTING**

*ENABLING SCHOOL DISTRICTS TO MANAGE AND USE STUDENT ASSESSMENT DATA*

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## **Student Generation Rate Study for the Lake Stevens School District**

### **With Grade Levels (K-5, 6-7, 8-9, 10-12)**

*This document describes the methodology used to calculate student generation rates (SGRs) for the Lake Stevens School District, and provides results of the calculations.*

*SGRs were calculated for two types of residential construction: Single family detached, and multi-family with 2 or more bedrooms. Attached condominiums, townhouses and duplexes are included in the multi-family classification since they are not considered "detached". Manufactured homes on owned land are included in the single family classification.*

- 1. Electronic records were obtained from the Snohomish County Assessor's Office containing data on all new construction within the Lake Stevens School District from January 2006 through December 2012. As compiled by the County Assessor's Office, this data included the address, building size, assessed value, and year built for new single and multi-family construction. The data was "cleaned up" by eliminating records which did not contain sufficient information to generate a match with the District's student record data (i.e. incomplete addresses).*
- 2. The District downloaded student records data into Microsoft Excel format. This data included the addresses and grade levels of all K-12 students attending the Lake Stevens School District as of March 2014. Before proceeding, this data was reformatted and abbreviations were modified as required to provide consistency with the County Assessor's data.*

3. *Single Family Rates:* The data on all new single family detached residential units in County Assessor's data were compared with the District's student record data, and the number of students at each grade level living in those units was determined. The records of 2,227 single family detached units were compared with data on 8,197 students registered in the District, and the following matches were found by grade level(s)\*:

GRADE(S)	COUNT OF MATCHES	CALCULATED RATE
K	139	0.062
1	118	0.053
2	114	0.051
3	139	0.062
4	109	0.049
5	121	0.054
6	115	0.052
7	133	0.060
8	91	0.041
9	114	0.051
10	90	0.040
11	96	0.043
12	76	0.034
K-5	740	0.332
6-7	248	0.111
8-9	205	0.092
10-12	262	0.118
K-12	1455	0.653

4. *Large Multi-Family Developments:* Snohomish County Assessor's data does not specifically indicate the number of units or bedrooms contained in large multi-family developments. Additional research was performed to obtain this information from specific parcel ID searches, and information provided by building management, when available. Information obtained included the number of 0-1 bedroom units, the number of 2+ bedroom units, and specific addresses of 0-1 bedroom units.

*Small Multi-Family Developments:* This method included all developments in the County Assessor's data containing four-plexes, tri-plexes, duplexes, condominiums and townhouses. This data contained information on the number of bedrooms for all townhouses and condominiums. Specific parcel ID searches were performed for duplex and larger units in cases where number of bedroom data was missing.

5. **Multi-Family 2+ BR Rates:** The multi-family 2+ BR SGR's were calculated by comparing data on 2+ BR multi-family units with the District's student record data, and the number of students at each grade level living in those units was determined. The records of 237 multi-family 2+ BR units were compared with data on 8,197 students registered in the District, and the following matches were found by grade level(s)\*:

GRADE(S)	COUNT OF MATCHES	CALCULATED RATE
K	10	0.042
1	5	0.021
2	5	0.021
3	8	0.034
4	5	0.021
5	7	0.030
6	7	0.030
7	2	0.008
8	9	0.038
9	6	0.025
10	5	0.021
11	5	0.021
12	3	0.013
K-5	40	0.169
6-7	9	0.038
8-9	15	0.063
10-12	13	0.055
K-12	77	0.325

6. **Multi-Family 0-1 BR Rates:** Research indicated that no (0) multi-family 0-1 BR units were constructed within District boundaries during the time period covered by this study.

7. **Summary of Student Generation Rates\*:**

	K-5	6-7	8-9	10-12	K-12
Single Family	.332	.111	.092	.118	.653
Multi-Family 2+ BR	.169	.038	.063	.055	.325

\*Calculated rates for grade level groups may not equal the sum of individual grade rates due to rounding.



Appendix D

Board Resolution Adopting

Capital Facilities Plan

Appendix E

Determination of Non-Significance and Environmental Checklist

Appendix F

Snohomish County General Policy Plan

## APPENDIX F

### REVIEW CRITERIA FOR SCHOOL DISTRICT CAPITAL FACILITY PLANS

#### Required Plan Contents

1. Future Enrollment Forecasts by Grade Span, including:
  - a 6-year forecast (or more) to support the financing program;
  - a description of the forecasting methodology and justification for its consistency with OFM population forecasts used in the county's comprehensive plan.
2. Inventory of Existing Facilities, including:
  - the location and capacity of existing schools;
  - a description of educational standards and a clearly defined minimum level of service such as classroom size, school size, use of portables, etc.;
  - the location and description of all district-owned or leased sites (if any) and properties;
  - a description of support facilities, such as administrative centers, transportation and maintenance yards and facilities, etc.; and
  - information on portables, including numbers, locations, remaining useful life (as appropriate to educational standards), etc.
3. Forecast of Future Facility Needs, including:
  - identification of new schools and/or school additions needed to address existing deficiencies and to meet demands of projected growth over the next 6 years; and
  - the number of additional portable classrooms needed.
4. Forecast of Future Site Needs, including:
  - the number, size, and general location of needed new school sites.
5. Financing Program (6-year minimum Planning Horizon)
  - estimated cost of specific construction and site acquisition and development projects proposed to address growth-related needs;
  - projected schedule for completion of these projects; and
  - proposed sources of funding, including impact fees (if proposed), local bond issues (both approved and proposed), and state matching funds.
6. Impact Fee Support Data (where applicable), including:
  - an explanation of the calculation methodology, including description of key variables and their computation;
  - definitions and sources of data for all inputs into the fee calculation, indicating that it:
    - a) is accurate and reliable and that any sample data is statistically valid;
    - b) accurately reflects projected costs in the 6-year financing program; and
  - a proposed fee schedule that reflects expected student generation rates from, at minimum, the following residential unit types: single-family, multi-family/studio or 1-bedroom, and multi-family/2-bedroom or more.

**Plan Performance Criteria**

1. School facility plans must meet the basic requirements set down in RCW 36.70A (the Growth Management Act). Districts proposing to use impact fees as a part of their financing program must also meet the requirements of RCW 82.02.
2. Where proposed, impact fees must utilize a calculation methodology that meets the conditions and tests of RCW 82.02.
3. Enrollment forecasts should utilize established methods and should produce results which are not inconsistent with the OFM population forecasts used in the county comprehensive plan. Each plan should also demonstrate that it is consistent with the 20-year forecast in the land use element of the county's comprehensive plan.
4. The financing plan should separate projects and portions of projects which add capacity from those which do not, since the latter are generally not appropriate for impact fee funding. The financing plan and/or the impact fee calculation formula must also differentiate between projects or portions of projects which address existing deficiencies (ineligible for impact fees) and those which address future growth-related needs.
5. Plans should use best-available information from recognized sources, such as the U.S. Census or the Puget Sound Regional Council. District-generated data may be used if it is derived through statistically reliable methodologies.
6. Districts which propose the use of impact fees should identify in future plan updates alternative funding sources in the event that impact fees are not available due to action by the state, county or the cities within their district boundaries.
7. Repealed effective January 2, 2000.

**Plan Review Procedures**

1. District capital facility plan updates should be submitted to the County Planning and Development Services Department for review prior to formal adoption by the school district.
2. Each school district planning to expand its school capacity must submit to the county an updated capital facilities plan at least every 2 years. Proposed increases in impact fees must be submitted as part of an update to the capital facilities plan, and will be considered no more frequently than once a year.
3. Each school district will be responsible for conducting any required SEPA reviews on its capital facilities plan prior to its adoption, in accordance with state statutes and regulations.

4. School district capital facility plans and plan updates must be submitted no later than 60 calendar days prior to their desired effective date. (For example, if a district requires its updated plan to take effect on January 1, 2007 in order to meet the minimum updating requirement of item 2. above, it must formally submit that plan no later than October 30, 2006.)

5. District plans and plan updates must include a resolution or motion from the district school board adopting the plan before it will become effective.

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**LAKEWOOD SCHOOL DISTRICT NO. 306**

**CAPITAL FACILITIES PLAN**

**2014-2019**

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**DRAFT: August 2014**

**APPROVED:**

\_\_\_\_\_, 2014

# **LAKEWOOD SCHOOL DISTRICT NO. 306**

## **CAPITAL FACILITIES PLAN**

**2014-2019**

### **BOARD OF DIRECTORS**

**LARRY BEAN, PRESIDENT**

**DAVID KIEFER, VICE-PRESIDENT**

**KELLY ALLEN**

**OSCAR ESCALANTE**

**GREGORY JENSEN**

### **SUPERINTENDENT**

**DR. MICHAEL MACK**

For information regarding the Lakewood School District Capital Facilities Plan, contact the Office of the Superintendent, Lakewood School District, P.O. Box 220, North Lakewood, WA 98259-0220. Tel: (360) 652-4500 or Fax: (360) 652-4502.



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Appendix C .....	School Impact Fee Calculations

## 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 Lakewood School District (the "District") has prepared this Capital Facilities Plan (the "CFP") to provide Snohomish County (the "County") and the cities of Arlington and Marysville with a description of facilities needed to accommodate projected student enrollment and a schedule and financing program for capital improvements over the next six years (2014-2019).

In accordance with the Growth Management Act, adopted County Policy, the Snohomish County Ordinance Nos. 97-095 and 99-107, the City of Arlington Ordinance No. 1263, 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, middle, and high school).
- 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 supporting data substantiating said fees.

In developing this CFP, the District followed the following guidelines set forth in the Snohomish County 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 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.

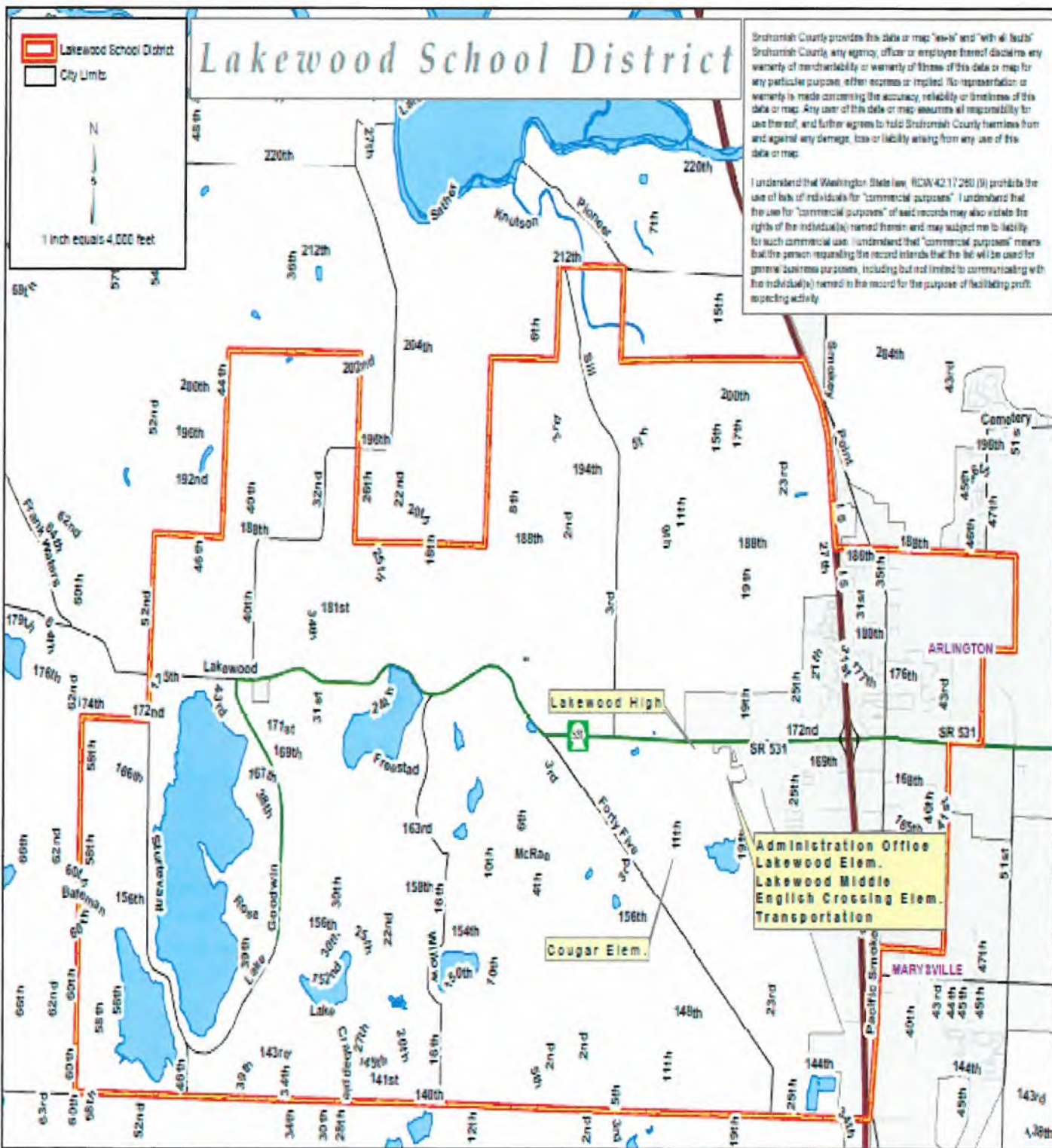
- The methodology used to calculate impact fees also complies with the criteria and the formulas established by the County.

***B. Overview of the Lakewood School District***

The Lakewood School District is located along Interstate 5, north of Marysville, Washington, primarily serving unincorporated Snohomish County and a part of the City of Arlington and the City of Marysville. The District is bordered on the south by the Marysville School District, on the west and north by the Stanwood School District, and on the east by the Arlington School District.

The District serves a student population of 2,253 (October 1, 2013 FTE Enrollment) with three elementary schools, one middle school, and one high school.

**FIGURE 1  
MAP OF 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 classroom facilities (portables), as well as specific and unique physical structure needs required to meet the full access needs of students with special needs.

In addition to factors which affect the amount of space required, government mandates and community expectations may 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, expanded bilingual education, remediation, migrant education, alcohol and drug education, AIDS education, preschool and daycare programs, computer labs, music programs, and others. These special or nontraditional educational programs can have a significant impact on the available student capacity of school facilities, and upon planning for future needs.

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

### ***Lakewood Elementary School (Preschool through 5th Grades)***

- Bilingual Education Program
- Title I Remedial Services Program
- P – 5<sup>th</sup> Grade Counseling Services
- Speech and Language Disorder Therapy Program
- Early Childhood Education and Assistance Program (ECEAP)
- Developmentally Delayed Preschool Program - Ages 3 to 5
- Developmentally Delayed Kindergarten Program
- K-5<sup>th</sup> Grade Special Education Resource Room Program
- Learning Assistance Program - Remedial Services
- Occupational Therapy Program

### ***English Crossing Elementary School (Kindergarten through 5th Grades)***

- K through 5th Grade Special Education Resource Room Program
- Bilingual Education Program
- K – 5th Grade Counseling Services
- Speech and Language Disorder Therapy Program
- Learning Assistance Program - Tutorial Services

- Occupational Therapy Program
- Special Education EBD Program

***Cougar Creek Elementary School (Kindergarten through 5th Grades)***

- Bilingual Education Program
- Title I Remedial Services Program
- Speech and Language Disorder Therapy Program
- Learning Assistance Program – Remedial Services (Learning Lab)
- Occupational Therapy Program
- K – 5<sup>th</sup> Grade Special Education Resource Room Program
- K – 5<sup>th</sup> Grade Special Education Life Skills Program (serves all K-5 schools)
- K – 5<sup>th</sup> Grade Counseling Services
- 3 – 5<sup>th</sup> Highly Capable/Enrichment Program (serves grades 3-5 district-wide)

***Lakewood Middle School (6th through 8th Grades)***

- Speech and Language Disorder Therapy Program
- 6th-8th Grade Special Education Resource and Inclusion Program
- 6th-8th Grade Special Education Life Skills Program
- Bilingual Education Program
- Learning Assistance Program - Tutorial Services
- Occupational Therapy Program
- 6<sup>th</sup> – 8<sup>th</sup> Grade Counseling Services

***Lakewood High School***

- 9th-12th Grade Special Education Resource Room and Transition Program
- 6th-12th Grade Special Education Life Skills Program
- Bilingual Education Program
- Occupational Therapy Program
- Speech and Language Disorder Program
- 9<sup>th</sup> – 12<sup>th</sup> Grade Counseling Program

Variations in student capacity between schools may result from the special or nontraditional programs offered at specific schools. Some students, for example, leave their regular classroom for a short period of time to receive instruction in these special programs. Schools recently added to the District's inventory have been designed to accommodate many of these programs. However, existing schools often require space modifications to accommodate special programs,

and in some circumstances, these modifications may affect the overall classroom capacities of the buildings.

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, use of new technology, and 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.

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 – 4th will not exceed 26 students.
- Class size for grades 5th – 8th will not exceed 28 students.
- All students will be provided library/media services in a school library.
- Special Education for students may be provided in self-contained or specialized classrooms.
- All students will be provided music instruction in a separate classroom.
- All students will have scheduled time in a computer lab. Each classroom will have access to computers and related educational technology.
- Optimum design capacity for new elementary schools is 475 students. However, actual capacity of individual schools may vary depending on the educational programs offered.
- All students will be provided physical education instruction in a gym or in a multipurpose room.

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

- Class size for middle school grades will not exceed 28 students.
- Class size for high school grades will not exceed 30 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. In updating this Capital Facility Plan, a building review of classroom use was conducted in order to reflect the actual classroom utilization in the high school and middle school. Therefore, classroom capacity should be adjusted using a utilization factor of 86% at the middle school and 83% at the high school to reflect the use of classrooms for teacher planning. Special Education for students will be provided in self-contained or specialized classrooms.
- All students will have access to computer labs. Each classroom is equipped with access to computers and related educational-technology.

- Identified students will also be provided other nontraditional educational opportunities in classrooms designated as follows:
  - Counseling Offices
  - Resource Rooms (i.e. computer labs, study rooms)
  - Special Education Classrooms
  - Program Specific Classrooms (i.e. music, drama, art, physical education, Industrial Arts and Agricultural Sciences).
- Optimum design capacity for new middle schools is 600 students. However, actual capacity of individual schools may vary depending on the educational programs offered.
- Optimum design capacity for new high schools is 800 students. However, actual capacity of individual schools may vary depending on the educational programs offered.

***Minimum Educational Service Standards***

The District will evaluate student housing levels based on the District as a whole system and not on a school by school or site by site basis. This may result in portable classrooms being used as interim housing, attendance boundary changes or other program changes to balance student housing across the system as a whole. A boundary change or a significant programmatic change would be made by the District’s Board of Directors following appropriate public review and comment.

The District has set minimum educational service standards based on several criteria. Exceeding these minimum standards will trigger significant changes in program delivery. Minimum standards have not been met if, on average using current FTE figures: K-4 classrooms have 26 or more students per classroom, 5-8 classrooms have 28 or more students per classroom, or 9-12 classrooms have 30 or more students per classroom. For purposes of this determination, the term “classroom” does not include special education classrooms or special program classrooms (i.e. computer labs, art rooms, chorus and band rooms, spaces used for physical education and other special program areas). Furthermore, the term “classroom” does not apply to special programs or activities that may occur in a regular classroom. The minimum educational service standards are not District’s desired or accepted operating standard.

The District reported the following information to Snohomish County in 2013 to demonstrate compliance with the minimum educational service standards:

LOS Standard	MINIMUM LOS# Elementary	CURRENT LOS Elementary	MINIMUM LOS Middle	CURRENT LOS Middle	MINIMUM LOS High	CURRENT LOS High
Lakewood No. 306	26	22	28	25	30	28

The District determines the current service level by adding the number of students in regular classrooms at each grade level and dividing that number by the number of teaching stations.



**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. Facility capacity is based on the space required to accommodate the District's adopted educational program standards. See Section 2. Attached as Figure 1 (page 3) is a map showing locations of District facilities.

**A. Schools**

The District maintains three elementary schools, one middle school, and one high school. Lakewood Elementary School accommodates grades P-5, Cougar Creek Elementary School accommodates grades K-5, and English Crossing Elementary School accommodates grades K-5. Lakewood Middle School serves grades 6-8, and Lakewood High School serves grades 9-12.

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 Table 1.

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 Table 1.

**Table 1  
School Capacity Inventory**

<b>Elementary School</b>	<b>Site Size (Acres)</b>	<b>Building Area (Square Feet)</b>	<b>Teaching Stations</b>	<b>Permanent Capacity</b>	<b>Year Built or Remodeled</b>
English Crossing	*	41,430	20	520	1994
Cougar Creek	10**	44,217	22	572	2003
Lakewood	*	45,400	16	416	1998/1997
<b>TOTAL</b>	<b>*</b>	<b>131,047</b>	<b>58</b>	<b>1,508</b>	

<b>Middle School</b>	<b>Site Size (Acres)</b>	<b>Building Area (Square Feet)</b>	<b>Teaching Stations</b>	<b>Permanent Capacity</b>	<b>Year Built or Remodeled</b>
Lakewood Middle	*	62,835	27	756	1971, 1994, and 2002

<b>High School</b>	<b>Site Size (Acres)</b>	<b>Building Area (Square Feet)</b>	<b>Teaching Stations</b>	<b>Permanent Capacity</b>	<b>Year Built or Remodeled</b>
Lakewood High	*	79,422	24	598	1982

\*Note: All facilities are located on one 89-acre campus located at Tax Parcel No. 31053000100300.

\*\*The Cougar Creek site is approximately 22 acres located at 16216 11<sup>th</sup> Ave NE, Arlington, WA 98223. Note that the presence of critical areas on the site does not allow full utilization at this site.

**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 18 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 2. Table 2 includes only those relocatable classrooms used for regular capacity purposes.

**Table 2  
Relocatable Classroom (Portable) Inventory**

<b>Elementary School</b>	<b>Relocatables</b>	<b>Interim Capacity</b>
English Crossing	5	135
Cougar Creek	0	0
Lakewood	5	130
<b>SUBTOTAL</b>	<b>10</b>	<b>265</b>

<b>Middle School</b>	<b>Relocatables</b>	<b>Interim Capacity</b>
Lakewood Middle	1	28
<b>SUBTOTAL</b>	<b>1</b>	<b>28</b>

<b>High School</b>	<b>Relocatables</b>	<b>Interim Capacity</b>
Lakewood High	7	174
<b>SUBTOTAL</b>	<b>7</b>	<b>174</b>

<b>TOTAL</b>	<b>18</b>	<b>467</b>
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**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 3.

**Table 3  
Support Facility Inventory**

<b>Facility</b>	<b>Building Area (Square Feet)</b>
Administration	1,384
Business and Operations	1,152
Storage	2,456
Bus Garage	5,216
Maintenance Shop	4,096
Stadium	14,500

**D. Land Inventory**

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**

The District’s October 1, 2013 FTE enrollment was 2,253. 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 Snohomish 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 projection. The Capital Facilities Plan does not assume mandatory Full-Day Kindergarten in its projections. If the State Legislature funds implementation, future updates to the Capital Facilities Plan will reflect an adjustment.

**A. Six Year Enrollment Projections**

Two enrollment forecasts were conducted for the District: an estimate by the Office of the Superintendent of Public Instruction (OSPI) based upon the cohort survival method; and an estimate based upon County population as provided by OFM (“ratio method”).

Based on the cohort survival methodology, a total of 2,249 FTE students are expected to be enrolled in the District by 2019, a slight decrease from the October 2013 enrollment levels. Notably, the cohort survival method does not anticipate new students from new development patterns. This is particularly true of new development resulting from annexation and rezoning (both of which have recently occurred in the City of Marysville).

OFM population-based enrollment projections were estimated for the District using OFM population forecasts for the County. The County provided the District with the estimated total population in the District by year. Between 2000 and 2013, the District’s student enrollment constituted approximately 16.89% of the total population in the District. Assuming that between 2014 and 2019, the District’s enrollment will continue to constitute 16.89% of the District’s total population and using OFM/County data, OFM/County methodology projects a total enrollment of 2,576 FTEs in 2019.

**Table 4  
Projected Student Enrollment (FTE)  
2014-2019**

Projection	Oct. 2013*	2014	2015	2016	2017	2018	2019	Change 2014-17	Percent Change 2014-17
OFM/County	2,253	2,306	2,359	2,412	2,465	2,518	2,576	323	13.33%
OSPI Cohort**	2,253	2,234	2,225	2,225	2,214	2,230	2,249	(4)	(.002%)

\* Actual FTE, October 2013

\*\*Based upon the cohort survival methodology (using FTE, which for the District is headcount enrollment with kindergarten at 0.5); complete projections located at Appendix A.

In addition to the OFM population-based enrollment projections, the District is aware of pending development within the District's portion of the City of Marysville. This information is based on development applications filed with the City and does not consider additional projects that may be submitted to the City within the six years of this plan period.

Given these pending developments and the fact that the OSPI method does not incorporate the County's planning data, the District has chosen to rely on the OFM population-based enrollment projections for purposes of planning for the District's needs during the six years of this plan period. Future updates to the Plan may revisit this issue.

**B. 2035 Enrollment Projections**

Student enrollment projections beyond 2019 are highly speculative. Using OFM/County data as a base, the District projects a 2035 student FTE population of 3,116. This is based on the OFM/County data for the years 2000 through 2013 and the District's average fulltime equivalent enrollment for the corresponding years (for the years 2000 to 2013, the District's actual enrollment averaged 16.89% of the OFM/County population estimates). The total enrollment estimate was broken down by grade span to evaluate long-term needs for capital facilities.

Projected enrollment by grade span for the year 2035 is provided in Table 5. Again, these estimates are highly speculative and are used only for general planning purposes.

**Table 5  
Projected Student Enrollment  
2035**

<b>Grade Span</b>	<b>FTE Enrollment – October 2013</b>	<b>Projected Enrollment 2035*</b>
Elementary (K-5)	970	1,340
Middle School (6-8)	539	748
High School (9-12)	744	1,028
<b>TOTAL (K-12)</b>	<b>2,253</b>	<b>3,116</b>

\*Assumes that percentage per grade span will remain constant through 2035.

Note: Snohomish County Planning and Development Service provided the underlying data for the 2035 projections.<sup>1</sup>

<sup>1</sup> The District has chosen to use Alternative #2 of the Snohomish County 2035 Population Forecast since it contains the medium-range forecast of potential growth.

**SECTION 5  
CAPITAL FACILITIES NEEDS**

The projected available student capacity was determined by subtracting projected FTE student enrollment from permanent school capacity (i.e. excluding portables) for each of the six years in the forecast period (2014-2019).

Capacity needs are expressed in terms of “unhoused students.”

Projected future capacity needs are depicted on Table 6-A and are derived by applying the projected enrollment to the capacity existing in 2014. 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 (see Table 7).

This table shows actual space needs and the portion of those needs that are “growth related” for the years 2014-2019.

**Table 6-A\*  
Additional Capacity Needs  
2013-2019**

<b>Grade Span</b>	<b>2013**</b>	<b>2014-15</b>	<b>2015-16</b>	<b>2016-17</b>	<b>2017-18</b>	<b>2018-19</b>	<b>2019-20</b>	<b>Pct. Growth Related</b>
<b>Elementary (K-5)</b>								
Total	0	0	0	0	0	0	0	
Growth Related	--	--	--	--	--	--	--	0%
<b>Middle School (6-8)</b>								
Total	0	0	0	0	0	0	0	
Growth Related	--	--	--	--	--	--	--	0%
<b>High School</b>								
Total	146	117	133	150	166	183	201	
Growth Related***	--	--	--	4	20	37	55	27.4%

\*Please refer to Table 7 for capacity and projected enrollment information.

\*\*Actual October 2013 FTE Enrollment

\*\*\*Existing deficiencies equal the “Total” less “Growth Related” capacity figures.

By the end of the six-year forecast period (2019), additional permanent classroom capacity will be needed as follows:

**Table 6-B  
Unhoused Students**

<b>Grade Span</b>	<b>Unhoused Students /Growth Related in Parentheses)</b>
Elementary (K-5)	0 / (0)
Middle School (6-8)	0 / (0)
High School (9-12)	201 / (55)
<b>TOTAL UNHOUSED (K-12)</b>	201 / (55)

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 in Table 6-B. However, Table 6-C incorporates the District’s current relocatable capacity (see Table 2) for purposes of identifying available capacity.

**Table 6-C  
Unhoused Students – Mitigated with Relocatables**

<b>Grade Span</b>	<b>2019 Unhoused Students /Growth Related in (Parentheses)</b>	<b>Relocatable Capacity</b>	<b>Unhoused Students*</b>
Elementary (K-5)	0 / (0)	265	-----
Middle School (6-8)	0 / (0)	28	-----
High School (9-12)	201 / (55)	174	-----

Importantly, Table 6-C does not include relocatable adjustment that may be made to meet capacity needs. For example, the relocatable classrooms currently designated to serve elementary school needs could be used to serve high school capacity needs. Therefore, assuming no permanent capacity improvements are made, Table 6-C indicates that the District will have adequate interim capacity with the use of relocatable classrooms to house students during this planning period.

Projected permanent capacity needs are depicted in Table 7. They are derived by applying the District’s projected number of students to the projected capacity. Planned improvements by the District through 2019 are included in Table 7 and more fully described in Table 8.

**Table 7  
Projected Student Capacity  
2014-2019**

**Elementary School Surplus/Deficiency**

	<b>Oct 2013 FTE</b>	<b>2014</b>	<b>2015</b>	<b>2016</b>	<b>2017</b>	<b>2018</b>	<b>2019</b>
Existing Capacity	1,508	1,508	1,508	1,508	1,508	1,508	1,508
Added Permanent Capacity							
Total Capacity	1,508	1,508	1,508	1,508	1,508	1,508	1,508
Enrollment	970	1,038	1,062	1,085	1,109	1,133	1,159
Surplus (Deficiency)	538	470	446	423	399	375	349

**Middle School Surplus/Deficiency**

	<b>Oct 2013 FTE</b>	<b>2014</b>	<b>2015</b>	<b>2016</b>	<b>2017</b>	<b>2018</b>	<b>2019</b>
Existing Capacity	756	756	756	756	756	756	756
Added Permanent Capacity*							
Total Capacity	756	756	756	756	756	756	756
Enrollment	539	553	566	579	592	604	618
Surplus (Deficiency)	217	203	190	177	164	152	138

**High School Surplus/Deficiency**

	<b>Oct 2013 FTE</b>	<b>2014</b>	<b>2015</b>	<b>2016</b>	<b>2017</b>	<b>2018</b>	<b>2019</b>
Existing Capacity	598	598	598	598	598	598	921
Added Permanent Capacity*						323	
Total Capacity	598	598	598	598	598	921	921
Enrollment	744	715	731	748	764	781	799
Surplus (Deficiency)	(146)	(117)	(133)	(150)	(166)	140	122

\*See Section 6 for project information.

See Appendix A for complete breakdown of enrollment projections.

See Table 6-A for a comparison of additional capacity needs due to growth versus existing deficiencies.



## SECTION 6 CAPITAL FACILITIES FINANCING PLAN

### *A. Planned Improvements*

In March 2000, the voters passed a \$14,258,664 bond issue for school construction and site acquisition. A new elementary school and a middle school addition were funded by that bond measure. These projects are complete. Based upon current needs, the District anticipates that it may need to consider the following acquisitions and/or improvements within the six years of this Plan:

#### **Projects Adding Permanent Capacity:**

- A three hundred (323) student expansion at Lakewood High School;
- A potential expansion at Lakewood Middle School, subject to future planning analysis and funding; and
- Acquisition and siting of portable facilities to accommodate growth needs.

#### **Non-Capacity Adding Projects:**

- High School modernization and improvements;
- Bus Garage improvements;
- Replace Administration Building;
- Replace Business Office Building; and
- Land acquisition for future sites.

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. The potential funding sources are discussed 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, District voters approved a \$14,258,664 bond issue for school construction and site acquisition, which included funding of Cougar Creek Elementary School. In April 2014, the District's voters approved a

\$66,800,000 bond measure to fund improvements, including a capacity addition, at Lakewood High School. .

**2. *State School Construction Assistance***

State School Construction Assistance 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 School Construction Assistance funds for specific capital projects based on a prioritization system. The District is eligible for State School Construction Assistance funds for new schools at the 54.59% funding percentage level.

**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***

The Six-Year Financing Plan shown in Table 8 demonstrates how the District intends to fund new construction and improvements to school facilities for the years 2014-2019. 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 8  
Capital Facilities Plan**

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

Project	2014	2015	2016	2017	2018	2019	Total Cost	Bonds/Levy	State Match	Impact Fees
<b>Elementary School</b>										
<b>Middle School</b>										
<b>High School</b>										
Lakewood High Addition			\$13.00	\$10.554			\$23.554	X	X	X
<b>Secondary</b>										
Site Acquisition			\$0.775				\$0.775	X		X

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

Project	2014	2015	2016	2017	2018	2019	Total Cost	Bonds/Levy	State Match	Impact Fees
<b>Elementary</b>										
<b>Middle School</b>										
<b>High School</b>										
Lakewood High Modernization and Shop/Lab Replacement			\$19.544	\$4.000			\$23.544	X	X	
LHS Stadium, Track and Stadium Field Improvements				\$3.100			\$3.100	X	X	
<b>District-wide</b>										

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

	2014	2015	2016	2017	2018	2019	Total Cost	Bonds/Levy	State Match	Impact Fees
<b>TOTAL</b>			\$33.319	\$171.654			\$50.973	X	X	X

## 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 in Snohomish County***

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, 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: single family; multi-family/studio or 1-bedroom; and multi-family/2-bedroom or more.

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.

### ***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. The costs of projects that do not add capacity are not included in the impact fee calculations. Furthermore, because the impact fee formula calculates a “cost per dwelling unit”, an identical fee is generated regardless of whether the total new capacity project costs are used in

the calculation or whether the District only uses the percentage of the total new capacity project costs allocated to the Districts growth-related needs, as demonstrated in Table 6-A. For purposes of this Plan, the District has chosen to use the full project costs in the fee formula. Furthermore, impact fees will not be used to address existing deficiencies. See Table 8 for a complete identification of funding sources.

The following projects are included in the impact fee calculation:

- A capacity addition at Lakewood High School.

Please see Table 8 and page 21 for relevant cost data related to each capacity project.

## FACTORS FOR ESTIMATED IMPACT FEE CALCULATIONS

<b>Student Generation Factors – Single Family</b>		<b>Average Site Cost/Acre</b>	
Elementary	.180		
Middle	.090		
Senior	.140		
<b>Total</b>	<b>.410</b>		
<b>Student Generation Factors – Multi Family (1 Bdrm)</b>		<b>Temporary Facility Capacity</b>	
Elementary	.000	Capacity	
Middle	.000	Cost	
Senior	.000		
<b>Total</b>	<b>.000</b>		
<b>Student Generation Factors – Multi Family (2+ Bdrm)</b>		<b>State Match Credit</b>	
Elementary	.198	Current State Match Percentage	54.59%
Middle	.099		
Senior	.139		
<b>Total</b>	<b>.436</b>		
<b>Projected Student Capacity per Facility</b>		<b>Construction Cost Allocation</b>	
High School (new addition) - 323		Current CCA	200.40
<b>Required Site Acreage per Facility</b>		<b>District Average Assessed Value</b>	
<b>Facility Construction/Cost Average</b>		Single Family Residence	\$259,068
High School (Addition)	\$23,553,551	<b>District Average Assessed Value</b>	
		Multi Family (1 Bedroom)	\$64,444
		Multi Family (2+ Bedroom)	\$94,676
		<b>SPI Square Footage per Student</b>	
		Elementary	90
		Middle	108
		High	130
		<b>District Debt Service Tax Rate for Bonds</b>	
		Current/\$1,000	\$2.50
		<b>General Obligation Bond Interest Rate</b>	
		Current Bond Buyer Index	4.38%
<b>Permanent Facility Square Footage</b>		<b>Developer Provided Sites/Facilities</b>	
Elementary	131,047	Value	0
Middle	62,835	Dwelling Units	0
Senior	79,422		
<b>Total</b>	<b>96.74%</b>		
	<b>273,304</b>		
<b>Temporary Facility Square Footage</b>			
Elementary	5,120		
Middle	512		
Senior	3,584		
<b>Total</b>	<b>3.26%</b>		
	<b>9,216</b>		
<b>Total Facility Square Footage</b>			
Elementary	136,167		
Middle	63,347		
Senior	83,006		
<b>Total</b>	<b>100.00%</b>		
	<b>282,520</b>		

**C. Proposed Lakewood School District Impact Fee Schedule**

Using the variables and formula described in subsection B, impact fees proposed for the District are summarized in Table 9. See also Appendix C.

**Table 9**  
**School Impact Fees**  
**Snohomish County, City of Arlington, City of Marysville**

<b>Housing Type</b>	<b>Impact Fee Per Dwelling Unit</b>
Single Family	\$1,203
Multi-Family (1 Bedroom)	\$0
Multi-Family (2+ Bedroom)	\$2,811

**APPENDIX A**

**POPULATION AND ENROLLMENT DATA**



**Table A-1**

**HISTORICAL STUDENT ENROLLMENT 2005-2013  
ACTUAL ENROLLMENTS ON OCTOBER 1st\***

GRADES	2005	2006	2007	2008	2009	2010	2011	2012	2013
K	98	89	95	86	97	82	99	92	98
1 <sup>st</sup> Grade	200	205	186	186	175	181	164	196	181
2 <sup>nd</sup> Grade	194	204	189	190	184	158	179	153	197
3 <sup>rd</sup> Grade	190	204	199	189	183	181	162	174	159
4 <sup>th</sup> Grade	202	200	200	209	194	171	175	159	181
5 <sup>th</sup> Grade	177	200	194	192	210	181	180	176	154
6 <sup>th</sup> Grade	193	184	200	191	212	210	194	180	178
7 <sup>th</sup> Grade	222	198	183	189	190	193	200	182	182
8 <sup>th</sup> Grade	216	215	207	185	197	190	204	203	179
9 <sup>th</sup> Grade	199	227	221	203	189	185	183	185	204
10 <sup>th</sup> Grade	158	188	218	212	205	181	187	176	178
11 <sup>th</sup> Grade	171	157	184	203	196	187	172	185	180
12 <sup>th</sup> Grade	175	171	161	188	204	180	189	165	182
<b>Total Enrollment</b>	<b>2,395</b>	<b>2,442</b>	<b>2,437</b>	<b>2,423</b>	<b>2,436</b>	<b>2,280</b>	<b>2,288</b>	<b>2,226</b>	<b>2,253</b>

\* FTE enrollment.

**Table A-2**

**PROJECTED STUDENT ENROLLMENT 2014-2019  
Based on OSPI Cohort Survival\*  
(Headcount Enrollment)**

STATE OF WASHINGTON  
SUPERINTENDENT OF PUBLIC INSTRUCTION  
SCHOOL CONSTRUCTION ASSISTANCE PROGRAM  
REPORT 1049 - DETERMINATION OF PROJECTED ENROLLMENTS  
SCHOOL YEAR 2013-2014

Snohomish/Lakewood(51306)

Grade	--- ACTUAL ENROLLMENTS ON OCTOBER 1st ---						AVERAGE % SURVIVAL	--- PROJECTED ENROLLMENTS ---					
	2008	2009	2010	2011	2012	2013		2014	2015	2016	2017	2018	2019
Kindergarten	172	194	163	197	184	195		196	199	203	206	210	213
Grade 1	186	175	181	164	196	181	98.69%	192	193	196	200	203	207
Grade 2	190	184	158	179	153	197	96.37%	174	185	186	189	193	196
Grade 3	189	183	181	162	174	159	99.66%	196	173	184	185	188	192
Grade 4	209	194	171	175	159	181	98.98%	157	194	171	182	183	186
Grade 5	192	210	181	180	176	154	99.28%	180	156	193	170	181	182
Grade 6	191	212	210	194	180	178	103.74%	160	187	162	200	176	188
K-6 Sub-Total	1,529	1,552	1,245	1,251	1,222	1,245		1,255	1,287	1,295	1,332	1,394	1,564
Grade 7	189	190	193	200	182	182	96.15%	171	154	180	156	192	169
Grade 8	185	197	190	204	203	179	101.95%	186	174	157	184	159	196
7-8 Sub-Total	374	387	383	404	385	361		357	328	337	340	351	365
Grade 9	203	189	185	183	185	204	96.70%	173	180	168	152	170	154
Grade 10	212	205	181	187	176	178	98.04%	200	170	176	165	149	175
Grade 11	203	196	187	172	185	180	95.97%	171	192	163	169	158	143
Grade 12	188	204	180	189	165	182	97.53%	176	167	187	159	165	154
9-12 Sub-Total	806	794	733	731	711	744		720	709	694	645	650	626
DISTRICT K-12 TOTAL	2,509	2,533	2,361	2,386	2,318	2,350		2,332	2,324	2,326	2,317	2,335	2,355

Notes: Specific subtotaling on this report will be driven by District Grade spans.

School Facilities and Organization

Printed Dec 23, 2013

\* The cohort survival method of predicting future enrollment does not consider enrollment attributable to new development in the District. Enrollment projections are most accurate for the initial years of the forecast period.

**Table A-3**

**AVERAGE PERCENTAGE ENROLLMENT BY GRADE SPAN**  
(OSPI Enrollment Projections – Using FTE Enrollment)

<b>Enrollment by Grade Span</b>	<b>Oct. 2013</b>	<b>2014</b>	<b>2015</b>	<b>2016</b>	<b>2017</b>	<b>2018</b>	<b>2019</b>
Elementary (K-5)	970	997	1,001	1,032	1,029	1,053	1,070
Middle School (6-8)	539	517	515	499	540	527	553
High School (9-12)	744	720	709	694	645	650	626
<b>TOTAL</b>	<b>2,253</b>	<b>2,234</b>	<b>2,225</b>	<b>2,225</b>	<b>2,214</b>	<b>2,230</b>	<b>2,249</b>

<b>Percentage by Grade Span</b>	<b>Oct. 2013</b>	<b>2014</b>	<b>2015</b>	<b>2016</b>	<b>2017</b>	<b>2018</b>	<b>2019</b>
Elementary (K-5)	43%	45%	45%	46%	47%	47%	47%
Middle School (6-8)	24%	23%	23%	22%	24%	24%	25%
High School (9-12)	33%	32%	32%	32%	29%	29%	28%
<b>TOTAL**</b>	<b>100%</b>	<b>100%</b>	<b>100%</b>	<b>100%</b>	<b>100%</b>	<b>100%</b>	<b>100%</b>

<b>Average Percentage by Grade Span</b>	
Elementary (K-5)	45%
Middle School (6-8)	24%
High School (9-12)	31%
<b>TOTAL</b>	<b>100%</b>

**Table A-4**

**AVERAGE PERCENTAGE ENROLLMENT BY GRADE SPAN  
(COUNTY/OFM Enrollment Projections)\*\*\***

<b>Enrollment by Grade Span</b>	<b>Oct. 2013*</b>	<b>Avg. %age</b>	<b>2014</b>	<b>2015</b>	<b>2016</b>	<b>2017</b>	<b>2018</b>	<b>2019</b>
Elementary (K-5)	970	45%	1,038	1,062	1,085	1,109	1,133	1,159
Middle School (6-8)	539	24%	553	566	579	592	604	618
High School (9-12)	744	31%	715	731	748	764	781	799
<b>TOTAL**</b>	<b>2,288</b>	<b>100%</b>	<b>2,306</b>	<b>2,359</b>	<b>2,412</b>	<b>2,465</b>	<b>2,518</b>	<b>2,576</b>

\*Actual October 2013 Enrollment.

\*\* Totals may vary due to rounding.

\*\*\*Using average percentage by grade span.

**APPENDIX B**

**STUDENT GENERATION FACTOR REVIEW**



**DOYLE  
CONSULTING**

*ENABLING SCHOOL DISTRICTS TO MANAGE AND USE STUDENT ASSESSMENT DATA*

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## **Student Generation Rate Study for the Lakewood School District**

4/10/2014

This document describes the methodology used to calculate student generation rates (SGRs) for the Lakewood School District, and provides results of the calculations.

SGRs were calculated for two types of residential construction: Single family detached, and multi-family with 2 or more bedrooms. Attached condominiums, townhouses and duplexes are included in the multi-family classification since they are not considered "detached". Manufactured homes on owned land are included in the single family classification.

1. Electronic records were obtained from the Snohomish County Assessor's Office containing data on all new construction within the Lakewood School District from January 2006 through December 2012. As compiled by the County Assessor's Office, this data included the address, building size, assessed value, and year built for new single and multi-family construction. The data was "cleaned up" by eliminating records which did not contain sufficient information to generate a match with the District's student record data (i.e. incomplete addresses).
2. The District downloaded student records data into Microsoft Excel format. This data included the addresses and grade levels of all K-12 students attending the Lakewood School District as of March 2014. Before proceeding, this data was reformatted and abbreviations were modified as required to provide consistency with the County Assessor's data.

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3. **Single Family Rates:** The data on all new single family detached residential units in County Assessor's data were compared with the District's student record data, and the number of students at each grade level living in those units was determined. The records of 200 single family detached units were compared with data on 2,310 students registered in the District, and the following matches were found by grade level(s)\*:

GRADE(S)	COUNT OF MATCHES	CALCULATED RATE
K	7	0.035
1	5	0.025
2	10	0.050
3	5	0.025
4	4	0.020
5	5	0.025
6	5	0.025
7	5	0.025
8	8	0.040
9	10	0.050
10	7	0.035
11	5	0.025
12	6	0.030
K-5	36	0.180
6-8	18	0.090
9-12	28	0.140
K-12	82	0.410

4. *Large Multi-Family Developments:* Snohomish County Assessor's data does not specifically indicate the number of units or bedrooms contained in large multi-family developments. Additional research was performed to obtain this information from specific parcel ID searches, and information provided by building management, when available. Information obtained included the number of 0-1 bedroom units, the number of 2+ bedroom units, and specific addresses of 0-1 bedroom units.

*Small Multi-Family Developments:* This method included all developments in the County Assessor's data containing four-plexes, tri-plexes, duplexes, condominiums and townhouses. This data contained information on the number of bedrooms for all townhouses and condominiums. Specific parcel ID searches were performed for duplex and larger units in cases where number of bedroom data was missing.

5. **Multi-Family 2+ BR Rates:** The multi-family 2+ BR SGR's were calculated by comparing data on 2+ BR multi-family units with the District's student record data, and the number of students at each grade level living in those units was determined. The records of 101 multi-family 2+ BR units were compared with data on 2,310 students registered in the District, and the following matches were found by grade level(s)\*:

GRADE(S)	COUNT OF MATCHES	CALCULATED RATE
K	1	0.010
1	6	0.059
2	4	0.040
3	4	0.040
4	4	0.040
5	1	0.010
6	3	0.030
7	6	0.059
8	1	0.010
9	6	0.059
10	4	0.040
11	2	0.020
12	2	0.020
K-5	20	0.198
6-8	10	0.099
9-12	14	0.139
K-12	44	0.436

6. **Multi-Family 0-1 BR Rates:** Research indicated that no (0) multi-family 0-1 BR units were constructed within District boundaries during the time period covered by this study.

7. **Summary of Student Generation Rates\*:**

	K-5	6-8	9-12	K-12
Single Family	.180	.090	.140	.410
Multi-Family 2+ BR	.198	.099	.139	.436

\*Calculated rates for grade level groups may not equal the sum of individual grade rates due to rounding.



**APPENDIX C**

**SCHOOL IMPACT FEE CALCULATIONS**

SCHOOL IMPACT FEE CALCULATIONS									
Snohomish County/Cities of Arlington and Marysville									
DISTRICT	Lakewood School District								
YEAR	2014								
School Site Acquisition Cost:									
(((AcresxCost per Acre)/Facility Capacity)xStudent Generation Factor									
	Facility	Cost/	Facility	Student	Student	Student	Cost/	Cost/	Cost/
	Acres	Acre	Capacity	SFR	MFR (1)	MFR (2+)	SFR	MFR (1)	MFR (2+)
Elementary	0.00	\$	500	0.180	0.000	0.198	\$0	\$0	\$0
Middle			85	0.090	0.000	0.099	\$0	\$0	\$0
High			323	0.140	0.000	0.139	\$0	\$0	\$0
							\$0	\$0	\$0
School Construction Cost:									
(((Facility Cost/Facility Capacity)xStudent Generation Factor)x(permanent/Total Sq Ft))									
	%Perm/	Facility	Facility	Student	Student	Student	Cost/	Cost/	Cost/
	Total Sq.Ft.	Cost	Capacity	SFR	MFR (1)	MFR (2+)	SFR	MFR (1)	MFR (2+)
Elementary	93.56%	\$	500	0.180	0.000	0.198	\$0	\$0	\$0
Middle	93.56%	\$	85	0.090	0.000	0.099	\$0	\$0	\$0
High	93.56%	\$ 23,553,551	323	0.140	0.000	0.139	\$9,552	\$0	\$9,483
						TOTAL	\$9,552	\$0	\$9,483
Temporary Facility Cost:									
(((Facility Cost/Facility Capacity)xStudent Generation Factor)x(Temporary/Total Square Feet))									
	%Temp/	Facility	Facility	Student	Student	Student	Cost/	Cost/	Cost/
	Total Sq.Ft.	Cost	Size	SFR	MFR (1)	MFR (2+)	SFR	MFR (1)	MFR (2+)
Elementary	6.44%	\$	26	0.180	0.000	0.198	\$0	\$0	\$0
Middle	6.44%	\$	29	0.090	0.000	0.099	\$0	\$0	\$0
High	6.44%	\$	30	0.140	0.000	0.139	\$0	\$0	\$0
						TOTAL	\$0	\$0	\$0
State Matching Credit:									
Boeckh Index X SPI Square Footage X District Match % X Student Factor									
	Boeckh	SPI	District	Student	Student	Student	Cost/	Cost/	Cost/
	Index	Footage	Match %	SFR	MFR (1)	MFR (2+)	SFR	MFR (1)	MFR (2+)
Elementary	\$ 200.40	90	0.00%	0.180	0.000	0.198	\$0	\$0	\$0
Middle	\$ 200.40	108	0.00%	0.090	0.000	0.099	\$0	\$0	\$0
Sr. High	\$ 200.40	130	94.59%	0.140	0.000	0.139	\$1,991	\$0	\$1,977
						TOTAL	\$1,991	\$0	\$1,977
Tax Payment Credit:									
Average Assessed Value									
							\$269,048	\$64,444	\$94,676
Capital Bond Interest Rate									
							4.38%	4.38%	4.38%
Net Present Value of Average Dwelling									
							\$2,042,081	\$512,949	\$753,584
Years Amortized									
							10	10	10
Property Tax Levy Rate (Bonds)									
							\$2.50	\$2.50	\$2.50
Present Value of Revenue Stream									
							\$5,155	\$1,282	\$1,884
Fee Summary:									
				Single	Multi-	Multi-			
				Family	Family (1)	Family (2+)			
Site Acquisition Costs				\$0	\$0	\$0			
Permanent Facility Cost				\$9,552	\$0	\$9,483			
Temporary Facility Cost				\$0	\$0	\$0			
State Match Credit				(\$1,991)	\$0	(\$1,977)			
Tax Payment Credit				(\$5,155)	(\$1,282)	(\$1,884)			
FEE (AS CALCULATED)				\$2,405	\$0	\$5,622			
FEE (AS DISCOUNTED 50%)				\$1,203	\$0	\$2,811			

# MARYSVILLE SCHOOL DISTRICT NO. 25

## CAPITAL FACILITIES PLAN

2014-2019



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

*August 2014 Draft*

*Adopted: September 2, 2014 (pending Board action)*

# MARYSVILLE SCHOOL DISTRICT NO. 25

## CAPITAL FACILITIES PLAN

2014-2019

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

### ***BOARD OF DIRECTORS***

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### ***SUPERINTENDENT***

Dr. Becky Berg

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For information regarding the Marysville School District 2014-2019 Capital Facilities Plan, contact Jim Baker, Marysville School District No. 25, 4220 80th Street N.E., Marysville, Washington 98270-3498. Telephone: (360) 653-7058.

## *SECTION ONE: 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. 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 Marysville School District (the “District”) has prepared this Capital Facilities Plan (the “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 (2014-2019).

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.

### *Overview of 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 an approximate student population of 10,804 (October 1, 2013 FTE enrollment) with eleven elementary schools (grades K-5), four middle level schools (6-8), and two comprehensive high school (grades 9-12). In addition, the District operates several small learning communities. In 1999, the District moved approximately 400 9<sup>th</sup> graders to Marysville Pilchuck High School with approximately 500 9<sup>th</sup> graders remaining at Marysville Junior High School. In 2007, the District completed the shift of 9<sup>th</sup> graders to Marysville Pilchuck High School and renamed Marysville Junior High School as Totem Middle School. During 2008, the District completed construction of the Marysville Tulalip Campus and consolidated several programs (serving grades 6-12) on one campus. The District also opened Grove Elementary School in the fall of 2008. The District opened the Marysville Getchell Campus, housing four separate 9-12 small learning communities, in the fall of 2010. For the purposes of facility planning, this CFP considers grades K-5 as elementary school, grades 6-8 as middle level school, and grades 9-12 as high school.

The District continues to make progress in addressing capacity needs. The opening of Grove Elementary School, the Marysville Tulalip Campus, and the Marysville Getchell Campus help to alleviate some of these needs. However, the District expects continued growth-related enrollment increases at the elementary level. Also of concern is the condition of its facilities. All schools need technology support upgrades (electrical and network). Eight elementary schools (Cascade, Kellogg Marsh, Grove, Liberty, Marshall, Pinewood, Shoultes, and Sunnyside), two middle schools (Marysville and Totem), and two high school (Marysville Pilchuck and Marysville Getchell) need improvements. In addition, support facilities need additional space.

### *Facilities and Capacity Needs*

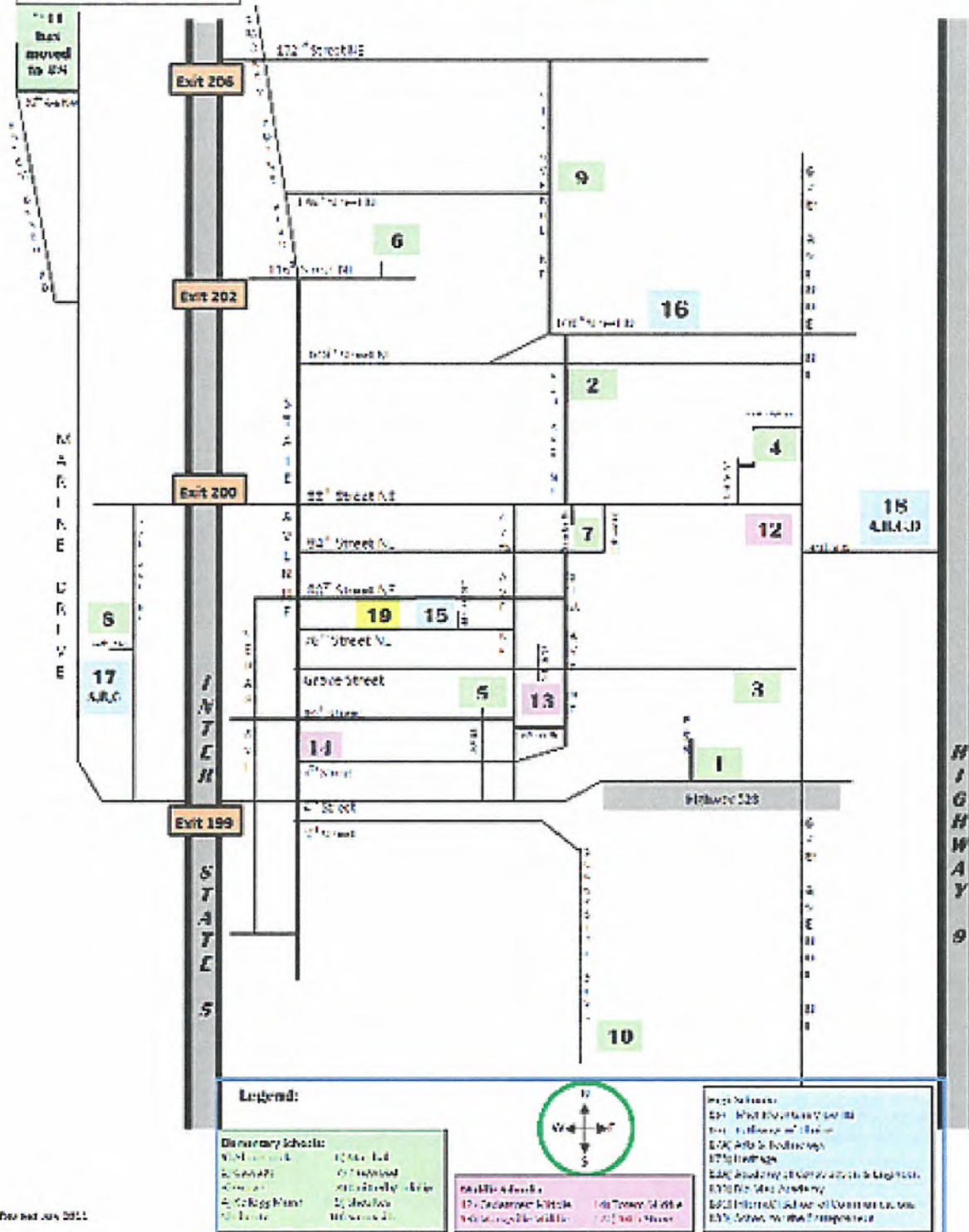
The District encounters a variety of issues that affect the capital facilities planning process. Affordable housing (as compared to Seattle and adjacent cities) in the District tends to draw young families, which puts demands on the school facilities. In addition, the 2005 amendments to the Snohomish County Comprehensive Plan expanded the Marysville urban growth boundary to include an additional 560.4 acres zoned for residential development. Also, a significant amount of acreage already within the Marysville UGA was rezoned to accommodate more density in housing developments. The dramatic modifications to land use priorities will have a significant impact on schools. Capacity impacts are obvious. In addition, locating and purchasing suitable property and agreement on scope and amount of future bond measures are of concern.

In February of 2006, the District's voters approved a school construction bond for approximately \$118 million. The bond helped to pay for the construction of Marysville Getchell High School and Grove Elementary School. The District also used the bond proceeds to acquire future school sites. In 2014, District voters approved a \$12 million technology levy. The District will consider presenting a future bond to the voters during the six years of this Plan to fund modernization and addition projects as identified in this Capital Facilities Plan.



# Welcome to the Marysville School District No. 25

\*\*Tully Elementary has been  
renamed to Quilley Elementary.  
We will be updating all maps and  
directions to include this.



Revised July 2011

Elementary Schools		Middle Schools (Grades 6-8)			
1	<b>Blaine Creek Elementary</b> 6505 40th Street NE Johnston #199 - Telephone: 360-653-6666 Capacity: 2.5 million - School #1 on the 100's	360-653-6666 <b>Debra McEly, Principal</b>	11th Street See #100's description on this page <b>Shawn Stevenson, Principal</b>	360-653-6666	
2	<b>Carroll Elementary</b> 5700 100th Street NE Total Enr: 2200 - Telephone: 360-653-6666 - Capacity: 2.5 million Formal Enr: 1500 Seats NE - School #100A, NE School #100B, NE	360-653-6666 <b>Teresa York-Williams, Principal</b>	12	<b>Centrose Middle School</b> 6400 80th Street NE Total Enr: 2000 - Telephone: 360-653-6666 - Capacity: 1.5 million Formal Enr: 1400 Seats NE	360-653-6666 <b>Shirley Gentry, Principal</b>
3	<b>Grove Elementary</b> 6600 Grove Street Johnston #199 - Telephone: 360-653-6666 Total Enr: 2200 - Telephone: 360-653-6666 - Capacity: 2.5 million Formal Enr: 1500 Seats NE - School #100A, NE School #100B, NE	360-653-6666 <b>Debra Harris, Principal</b>	13	<b>Maryville Middle School</b> 4915 80th Street NE Total Enr: 2100 - Telephone: 360-653-6666 - Capacity: 1.5 million Formal Enr: 1500 Seats NE - School #100A, NE School #100B, NE	360-653-6666 <b>Susan Haggberg, Principal</b>
4	<b>Kittling Marsh Elementary</b> 6325 110 Street NE Total Enr: 2200 - Telephone: 360-653-6666 - Capacity: 2.5 million Formal Enr: 1500 Seats NE - School #100A, NE School #100B, NE	360-653-6666 <b>Sharon Anderson, Principal</b>	14	<b>Town Middle School</b> 1605 7th Street Total Enr: 2100 - Telephone: 360-653-6666 - Capacity: 1.5 million Formal Enr: 1500 Seats NE - School #100A, NE School #100B, NE	360-653-6666 <b>Robert Kalish, Principal</b>
5	<b>Liberty Elementary</b> 3900 100th Street Johnston #199 - Telephone: 360-653-6666 Capacity: 2.5 million - School #1 on the 100's	360-653-6666 <b>Scott Lewis, Principal</b>	<b>High Schools (Grades 9-12) - Learning Communities</b>		
6	<b>Marshall Elementary</b> 4400 110th Street NE Johnston #199 - Telephone: 360-653-6666 Capacity: 2.5 million - School #1 on the 100's	360-653-6666 <b>Kristina Gunnery, Principal</b>	15	<b>Maryville Mountain View High School</b> 3310 20th Street NE Total Enr: 2100 - Telephone: 360-653-6666 - Capacity: 1.5 million Formal Enr: 1500 Seats NE - School #100A, NE School #100B, NE	360-653-6666 <b>Debra Barmeter, Principal</b>
7	<b>Pinewood Elementary</b> 5115 100th Street NE Total Enr: 2200 - Telephone: 360-653-6666 - Capacity: 2.5 million Formal Enr: 1500 Seats NE - School #100A, NE School #100B, NE	360-653-6666 <b>Debra Williams, Principal</b>	16	<b>Maryville Pikeview Campus</b> 6611 100th Street NE Total Enr: 2100 - Telephone: 360-653-6666 - Capacity: 1.5 million Formal Enr: 1500 Seats NE - School #100A, NE School #100B, NE	360-653-6666 <b>Andrew F. Orr, Principal</b>
8	<b>Quil Cove/Tulip Elementary</b> 2415 14th Street NE Johnston #200 - Telephone: 360-653-6666 - Capacity: 2.5 million Formal Enr: 1500 Seats NE - School #100A, NE School #100B, NE	360-653-6666 <b>Kristen DeWitt, Principal</b>	17	<b>Maryville Tulip Campus (Reopened June 2011)<sup>1</sup></b> (Formerly Maryville Secondary Campus) 7804 27th Avenue NE Total Enr: 2000 - Telephone: 360-653-6666 - Capacity: 1.5 million Formal Enr: 1500 Seats NE - School #100A, NE School #100B, NE	360-653-6666
9	<b>Sioux Falls Elementary</b> 15525 5th Avenue NE Johnston #199 - Telephone: 360-653-6666 Capacity: 2.5 million - School #1 on the 100's	360-653-6666 <b>Christi Sampson, Principal</b>	18 A	<b>Maryville Arts &amp; Technology</b> - <b>Tom Kitchin, Principal</b>	360-653-6666
10	<b>Sunnyside Elementary</b> 3307 Sunnyside Blvd. Johnston #199 - Telephone: 360-653-6666 Capacity: 2.5 million - School #1 on the 100's	360-653-6666 <b>Sharon Stone, Principal</b>	18 B	<b>Highgate (Grades 9-12)</b> - <b>Suey-Lyn D. Octor</b>	360-653-6666
			18 C	<b>11th Street (Grades 9-12)</b> - <b>Shawn Stevenson, Principal</b>	360-653-6666
			19	<b>Maryville General Campus (Opened Fall 2010)</b> 8701 8th Street NE Total Enr: 2000 - Telephone: 360-653-6666 - Capacity: 1.5 million Formal Enr: 1500 Seats NE - School #100A, NE School #100B, NE	360-653-6666
			19 A	<b>Add. of Grade 9 Edg.</b> - <b>Shawn Stevenson, Principal</b>	360-653-6666
			19 B	<b>Blended Academy</b> - <b>Scott Hurdick, Principal</b>	360-653-6666
			19 C	<b>11th School of Science</b> - <b>Angela Hanson, Principal</b>	360-653-6666
			19 D	<b>Screening the Entrepreneur</b> - <b>Debra Rowe, Principal</b>	360-653-6666
<b>Administrative Offices - Service Center</b>					
			19	<b>District Office</b> 4220 80th Street NE	360-653-7058

## ***SECTION 2 -- EDUCATIONAL PROGRAM STANDARDS***

The District acknowledges and realizes that classroom population impacts the quality of instruction provided. 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. In addition, the State Legislature's implementation of requirements for all-day kindergarten and reduced K-3 class size will also impact school capacity and educational program standards. (Approximately 41% of the District's kindergarten enrollment is currently all-day.) If the State Legislature funds implementation, future updates to the CFP will reflect any adjustments. 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.

Within the context of this topic, there are at least three methodologies that can be applied to capacity forecasting. Those include a maximum class size based on contractual obligations, a maximum class size target, and a minimum service level.

The District has internal targets, which predicate staffing decisions. These internal targets are the District's preferred capacity levels. In comparison, class size based on a maximum number of students is predicated on contractual language in the contract with the Marysville Education Association. This contract specifies a maximum number of students in a classroom above which the District must fund additional classroom assistance. Finally, the minimum service level represents the capacity level that the District will not exceed. This is determined by an average maximum number of students in a classroom by grade (for K-8 classes) or by a course of study (for the 9-12 grade level). For example, grade 8 may have an average class size (and minimum level of service) of 32 students. Some classrooms might have less than 32 students and some classrooms might have more than 32 students; however the average of grade 8 classrooms district-wide will not exceed 32 students. At the secondary school level, some classes will

exceed 34 students (band, physical education, etc.). This minimum service level is defined for core classes and is an average of all core classes for the secondary level. Table 1 compares class size methodologies.

**Table 1**  
**Class Size Methodologies**

<i>Grade Level</i>	<i>District Targets</i>	<i>Maximum (Per Contract)</i>	<i>Minimum Service Level</i>
Kindergarten	23	24	27
Grades 1 – 3	23	24	29
Grades 4 – 5	25	27	30
Grades 6 – 8	25	30	32
Grades 9 – 12	25	30	34

***Educational Program Standards Based Upon Internal Targets***

***Elementary Schools:***

- Average class size for Kindergarten should not exceed 23 students.
- Average class size for grades 1-3 should not exceed 23 students.
- Average class size for grades 4-5 should not exceed 25 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 and Junior High Schools:***

- Average class size for grades 6-8 should not exceed 25 students.
- 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 available teaching stations depending on the physical characteristics of the facility and program needs.
- 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).

***High Schools:***

- Average class size for grades 9-12 should not exceed 25 students.
- 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 available teaching stations depending on the physical characteristics of the facility and program needs.

- 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).

The following information reflects the District’s current compliance with the minimum educational service standards (as reported to Snohomish County in 2013):

LOS Standard	MINIMUM LOS# Elementary	CURRENT LOS Elementary	MINIMUM LOS Middle	CURRENT LOS Middle	MINIMUM LOS High	CURRENT LOS High
Marysville No. 25	29	20.25	32	21.6	34	22.2
Maximum average class size						

The District determines the current service level by adding the number of students per regular classroom at each grade level and dividing that number by the number of teaching stations.

**SECTION THREE: 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 Two: Educational Program Standards.* A map showing locations of District facilities is provided on page 4.

***Schools***

See *Section One* for a description of the District’s schools and programs.

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 and internal targets. 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 2, 3, and 4.

***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 65 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 5.

**Table 2  
Elementary School Inventory**

<b><i>Elementary School</i></b>	<b><i>Site Size (Acres)</i></b>	<b><i>Building Area (sq ft)</i></b>	<b><i>Teaching Stations*</i></b>	<b><i>Permanent Capacity**</i></b>
Allen Creek	11.0	47,594	21.0	496
Cascade	9.5	38,923	21.0	496
Grove	6.2	54,000	24.0	566
Kellogg Marsh	12.8	47,816	21.0	496
Liberty	9.1	40,459	20.0	472
Marshall	13.7	53,063	14.0	330

Pinewood	10.5	40,073	17.0	401
Quil Ceda	10.0	47,594	27.0	637
Shoultes	9.5	40,050	16.0	378
Sunnyside	10.4	39,121	22.0	519
<b>TOTAL</b>	<b>102.7</b>	<b>448,693</b>	<b>203</b>	<b>4,791</b>

\* Teaching Station Definition: A space designated as a classroom. Other stations include spaces designated for special education and pull-out programs.

\*\* Regular classrooms.

**Table 3**  
**Middle Level School Inventory**

<i>Middle Level School</i>	<i>Site Size (Acres)</i>	<i>Building Area (sq ft)</i>	<i>Teaching Stations*</i>	<i>Permanent Capacity**</i>
Cedarcrest	27.0	83,128	29.0	725
Marysville Middle	21.0	99,617	32.0	800
Marysville Tulalip Campus*** (6-8)	***	15,000	7.0	175
Totem	15.2	124,822	30.0	750
<b>TOTAL</b>	<b>63.2</b>	<b>322,567</b>	<b>98</b>	<b>2,450</b>

\* Teaching Station Definition: A space designated as a classroom. Other stations include spaces designated for special education and pull-out programs.

\*\* Regular classrooms.

\*\*\* \*The Marysville Tulalip Campus includes the following schools co-located on one campus: Arts & Technology, Tulalip Heritage, and the 10<sup>th</sup> Street School. Grades 6-12 are served at the Marysville Tulalip Campus. The above chart identifies information relevant to grades 6-8.



*Table 4  
High School Inventory*

<i>High School</i>	<i>Site Size (Acres)</i>	<i>Building Area (sq ft)</i>	<i>Teaching Stations*</i>	<i>Permanent Capacity**</i>
Marysville Pilchuck	83.0	259,033	56.0	1,400
Marysville Getchell	38.0	193,000	61.0	1,525
Marysville Tulalip Campus*** (9-12)	39.4	70,000	19.0	475
Mountain View	2.4	18,350	8.0	200
<b><i>TOTAL</i></b>	<b>162.8</b>	<b>540,383</b>	<b>144</b>	<b>3,600</b>

\* Teaching Station Definition: A space designated as a classroom. Other stations include spaces designated for special education and pull-out programs.

\*\* Regular classrooms.

\*\*\* \*The Marysville Tulalip Campus includes the following schools co-located on one campus: Arts & Technology, Tulalip Heritage, and the 10<sup>th</sup> Street School. Grades 6-12 are served at the Marysville Tulalip Campus. The above chart identifies information relevant to grades 9-12.

**Table 5**  
**Relocatable Classroom (Portable) Inventory\***

<i>Elementary School</i>	<i>Relocatables**</i>	<i>Other Relocatables***</i>	<i>Interim Capacity</i>
Allen Creek	7	0	165
Cascade	3	2	71
Kellogg Marsh	5	2	118
Liberty	6	2	142
Marshall	3	3	71
Pinewood	3	4	71
Quil Ceda	3	4	71
Shoultes	5	3	118
Sunnyside	4	5	94
<b><i>SUBTOTAL</i></b>	<b>39</b>	<b>25</b>	<b>921</b>

<i>Middle Level School</i>	<i>Relocatables</i>	<i>Other Relocatables</i>	<i>Interim Capacity</i>
Cedarcrest	12	2	300
Marysville Middle	7	2	175
Totem	0	0	0
<b><i>SUBTOTAL</i></b>	<b>19</b>	<b>4</b>	<b>475</b>

<i>High School</i>	<i>Relocatables</i>	<i>Other Relocatables</i>	<i>Interim Capacity</i>
Marysville-Getchell	0	0	0
Marysville-Pilchuck	6	0	150
Mountain View	2	0	52
<b><i>SUBTOTAL</i></b>	<b>8</b>	<b>0</b>	<b>202</b>

<b><i>TOTAL</i></b>	<b>66</b>	<b>29</b>	<b>1,623</b>
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\* Each portable is 600 square feet.

\*\*Used for regular classroom capacity.

\*\*\*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 6.

**Table 6**  
**Support Facility Inventory**

<i>Facility</i>	<i>Building Area (Square Feet)</i>	<i>Site Size (Acres)</i>
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 7.

**Table 7**  
**Undeveloped Site Inventory**

<i>Site</i>	<i>Site Size (Acres)</i>
4315 71 <sup>st</sup> Ave NE	7.00
132nd Street Site	20.00
152nd Street Site	35.02
Old Getchell Site	10.00
West Marshall Site (School Farm)	18.00
Frondorf Site	27.75
Highway 9 Site	53.00

Development on some of these sites is restricted due to significant wetlands, limited site sizes, high utility costs, and/or inappropriate locations. In addition to these sites, the District owns four sites of less than two acres.

## ***SECTION FOUR: STUDENT ENROLLMENT TRENDS AND PROJECTIONS***

Generally, enrollment projections using historical calculations are most accurate for the initial years of the forecast period. Moving further into the future, more assumptions about economic conditions, land use, 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 CFP. 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.

With the assistance of a professional demographer, the District has developed its own methodology for forecasting future enrollments. This methodology, a modified cohort survival method, considers a variety of factors to evaluate the potential student population growth for the years 2014 through 2027. These factors include: Office of Financial Management population forecasts for Snohomish County and historical data; Office of the Superintendent of Public Instruction data regarding enrollment history by year and grade and other statistical data regarding District-specific enrollment trends; Washington State Health Department and Snohomish County birth statistics (for purposes of predicting kindergarten enrollments); Washington State Department of Licensing statistics regarding population migration; Educational Service District 189 statistics regarding enrollment trends; Snohomish County and City of Marysville data regarding residential home construction; United States Census records regarding population age groupings; and District data regarding alternative program enrollment statistics and trends, student transfer statistics and trends, and current school enrollment figures by grade level and schools.

The District methodology uses the cohort projections developed by the Office of the Superintendent of Public Instruction as a baseline and then applies a growth factor, derived from the evaluated factors, for each year through 2027. *See Appendix A* (which shows the District's Headcount Enrollment Projections). The growth factor starts at 0% and is then determined by balancing the positive and negative evaluated factors (i.e. those listed in the paragraph above) which could affect student enrollment figures over the term of the forecast. As an example, the 2009 kindergarten class is the largest in the history of the District and, along with the large number of births in Snohomish County over the last five years, should indicate that high kindergarten enrollments will continue, resulting in positive overall enrollment. However, on the negative side, the District is has lost some students who have opted to attend schools in other surrounding districts. These two trends tend to cancel each other out, in creating either a plus or minus growth factor.

District enrollment has declined in recent years, likely due to a variety of factors such as economic circumstances, slower in-migration, and students opting for alternative education plans. However, the six year enrollment forecast demonstrates enrollment growth at the elementary level over the next six years. Using the modified cohort survival projections, a total

enrollment of 10,692 (FTE)<sup>1</sup> is expected in 2019. In other words, the District projects a decline in enrollment by 112 students between 2013 and 2019. See Table 10. However, elementary enrollment is projected to have continued growth with an addition of 42 students. See Table 14. The growth in elementary enrollment does not include the implementation of all day kindergarten, which would result in an addition of 267 students, for a total growth addition of 309 elementary students.

OFM population-based enrollment projections were estimated for the District using OFM population forecasts for the County.<sup>2</sup> Between 2000 and 2013 the District's enrollment constituted approximately 16.98% of the District's total population. Assuming that, between 2014 and 2019, the District's enrollment will continue to constitute 16.98% of the District's population, using OFM/County data, the District projects a total enrollment of 13,021 students in 2019. See Table 10.

**Table 10**  
**Projected Student Enrollment (FTE)\***  
**2014-2019**

<i>Projection</i>	<i>2013*</i>	<i>2014</i>	<i>2015</i>	<i>2016</i>	<i>2017</i>	<i>2018</i>	<i>2019</i>	<i>Actual Change</i>	<i>Percent Change</i>
OFM/County	10,804	11,174	11,544	11,914	12,284	12,654	13,021	2,217	28.2%
District	10,804	10,853	10,813	10,732	10,691	10,683	10,692	(112)	(1.04)%

\* The District uses FTE enrollment, which is essentially headcount enrollment with the kindergarten enrollment adjusted to account for the current split between all-day and half-day kindergarten, to reflect actual classroom usage. For example, the "District" enrollment line in Table 10 is derived from the District's headcount enrollment projections located in Appendix I. The reader can see that Appendix A projects 11,122 students in 2014. When the kindergarten enrollment for 2014 is adjusted, the total K-12 enrollment for 2014 is 10,853.

\*\* Actual FTE enrollment (October 1, 2013).

Based upon the immediate dynamics of the District, as discussed above, the District has chosen to follow the more conservative District estimates as opposed to the OFM/County projections during this planning period. This decision will be revisited in future updates to the CFP.

### **2035 Enrollment Projections**

Student enrollment projections beyond 2019 and to the future are highly speculative. The District projects a total enrollment of 11,128 FTE students in 2027, the last year in the District's projections. This is based on the District's enrollment projections updated in 2013. See Appendix A. 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. See Table 11-A below. Again, these estimates are highly speculative and are used only for general planning purposes.

<sup>1</sup> FTE projected enrollment is derived by using the Headcount Enrollment Projections in Appendix A and multiplying kindergarten enrollment by 0.50 and then adding back approximately 40% of that figure to reflect the current percentage of kindergarten students in the District attend all-day kindergarten.

<sup>2</sup> The District has chosen to use Alternative #3 of the Snohomish County 2035 Population Forecast since it contains the high end of potential growth. This alternative provides the District with an outside measure of growth.

**Table 11-A**  
**Projected FTE Student Enrollment - District**  
**2027**

<i>Grade Span</i>	<i>Projected FTE Enrollment</i>
Elementary (K-5)	5,206
Middle Level School (6-8)	2,555
High School (9-12)	3,367
<b>TOTAL (K-12)</b>	<b>11,128</b>

Assuming that the District's enrollment will continue to constitute 16.98% of the District's population through 2035, the projected enrollment by grade span *based upon the County/OFM projections* is as follows:

**Table 11-B**  
**Projected FTE Student Enrollment – County/OFM**  
**2035**

<i>Grade Span</i>	<i>Projected FTE Enrollment</i>
Elementary (K-5)	7,057
Middle Level School (6-8)	3,639
High School (9-12)	4,863
<b>TOTAL (K-12)</b>	<b>15,559</b>

**SECTION FIVE: 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 (2014-2019). Capacity needs are expressed in terms of “unhoused students” Table 12 identifies the District’s current capacity needs (based upon information contained in Table 14):

**Table 12**  
**Unhoused Students – Based on October 2013 Enrollment/Capacity**

<i>Grade Span</i>	<i>Unhoused Students/(Available Capacity)</i>
Elementary Level (K-5)	111
Middle Level (6-8)	77
High School Level (9-12)	(223)

The method used to define future capacity needs assumes that:

- Capacity additions at Cascade and Liberty Elementary Schools are complete by the fall of 2019.

Assuming these capacity additions, Table 13 identifies the additional permanent classroom capacity that will be needed in 2019, the end of the six year forecast period:

**Table 13**  
**Unhoused Students – 2019**

<i>Grade Span</i>	<i>Unhoused Students/(Available Capacity)</i>
Elementary Level (K-5)	(11)
Middle Level (6-8)	41
High School Level (9-12)	(343)

Projected future capacity needs, shown in Table 14, are derived by applying the projected number of students to the projected capacity. Grade reconfigurations and planned improvements by the District through 2019 are included in Table 14. 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 (except for in the total District capacity summary). (Information on relocatable classrooms by grade level and interim capacity can be found in Table 5. Information on planned construction projects can be found in the Financing Plan, Table 15.) Current deficiencies are shown in Table 12.

**Table 14**  
**Projected Student Capacity – 2014 through 2019**

**Elementary School -- Surplus/Deficiency**

	<b>2013*</b>	<b>2014</b>	<b>2015</b>	<b>2016</b>	<b>2017</b>	<b>2018</b>	<b>2019</b>
Existing Capacity	4,791	4,791	4,791	4,791	4,791	4,791	4,791
Added Permanent Capacity	0	0	0	0	0	0	164** *
Total Capacity**	4,791	4,791	4,791	4,791	4,791	4,791	4,955
Enrollment	4,902	4,934	4,924	4,911	4,971	4,974	4,944
Surplus (Deficiency)**	(111)	(143)	(133)	(120)	(180)	(183)	11

\*Actual October 2013 FTE enrollment

\*\*Does not include added relocatable capacity

\*\*\*Additions at Cascade and Liberty

**Middle School Level -- Surplus/Deficiency**

	<b>2013*</b>	<b>2014</b>	<b>2015</b>	<b>2016</b>	<b>2017</b>	<b>2018</b>	<b>2019</b>
Existing Capacity	2,450	2,450	2,450	2,450	2,450	2,450	2,450
Added Permanent Capacity	0	0	0	0	0	0	0
Total Capacity**	2,450	2,450	2,450	2,450	2,450	2,450	2,450
Enrollment	2,527	2,469	2,427	2,417	2,404	2,428	2,491
Surplus (Deficiency)**	(77)	(19)	23	33	46	22	(41)

\*Actual October 2013 FTE enrollment

\*\*Does not include added relocatable capacity



*High School Level -- Surplus/Deficiency*

	<i>2013*</i>	<i>2014</i>	<i>2015</i>	<i>2016</i>	<i>2017</i>	<i>2018</i>	<i>2019</i>
Existing Capacity	3,600	3,600	3,600	3,600	3,600	3,600	3,600
Added Permanent Capacity	0	0	0	0	0	0	0
Total Capacity**	3,600	3,600	3,600	3,600	3,600	3,600	3,600
Enrollment	3,377	3,468	3,466	3,404	3,316	3,281	3,257
Surplus (Deficiency)**	223	132	134	196	284	319	343

\*Actual October 2013 FTE enrollment

\*\*Does not include added relocatable capacity.

## **SECTION SIX: FINANCING PLAN**

### ***Planned Improvements***

The District plans to present for voter approval the replacement and addition of capacity at Cascade Elementary School and Liberty Elementary School (using the Grove Elementary School prototype). These projects will help to address capacity needs at the elementary level. The District is not currently planning to add permanent capacity at the middle or high school levels. Enrollment at those levels is expected to decline over the six year planning period (as illustrated in Table 14) and existing relocatables should provide sufficient interim capacity. The District's voters recently passed a levy for technology upgrades, which will be implemented over the six year planning period.

### ***Financing for Planned Improvements***

Funding for planned improvements is typically secured from a number of sources including voter-approved bonds, State match funds, and impact fees.

***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's voters approved funding for the new high school and new elementary school in February of 2006. Future bond issues will require input from community and staff, substantial exploration of facility options, and critical decisions by the Board of Directors.

***State School Construction Assistance Funds:*** State School Construction Assistance 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 School Construction Assistance Funds for specific capital projects based on a prioritization system.

***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 Section 7 School Impact Fees.*

The Six-Year Financing Plan shown on Table 15 demonstrates how the District intends to fund new construction and improvements to school facilities for the years 2014-2019. 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 15**  
**Capital Facilities Financing Plan**

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

Project	2013	2014	2015	2016	2017	2018	2019	Total Cost	Bonds/ Local Funds	Projected State Match	Impact Fees <sup>3</sup>
<b>Elementary</b>											
Cascade Addition <sup>4</sup>				\$1.250	\$1.388			\$2.638	\$1.899	\$0.738	\$0.089
Liberty Addition <sup>5</sup>				\$1.535	\$2.000			\$3.535	\$1.025	\$1.025	\$0.167
<b>Middle School</b>											
<b>High School</b>											
<b>Land Purchase (for future growth)</b>											

\*\*All projects are growth-related.

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

	2013	2014	2015	2016	2017	2018	2019	Total Cost	Bonds/ Local Funds	Projected State Match	Impact Fees
<b>Elementary</b>				\$2.785	\$3.388			\$6.173	\$2.924	\$1.763	\$0.256
<b>Middle Level</b>											
<b>High School</b>											
<b>Land Purchase</b>											
<b>TOTALS</b>				\$2.785	\$3.388			\$6.173	\$2.924	\$1.763	\$0.256

\*\*All projects are growth-related.

<sup>3</sup> Fees in this column are based on amount of fees collected to date and estimated fees on future units. Estimated fees are based on recent fee collections and a review of projected fee amounts and known or anticipated future growth.

<sup>4</sup> The cost estimate for Cascade is for a pro-rata (@ 12.39%) of the total estimated cost of construction. This corresponds to the additional capacity added to the replacement capacity for the school.

<sup>5</sup> The cost estimate for Liberty is for a pro-rata (@ 16.60%) of the total estimated cost of construction. This corresponds to the additional capacity added to the replacement capacity for the school.

**Table 15**  
**Capital Facilities Financing Plan**

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

Project	2014	2015	2016	2017	2018	2019	Total Cost	Bonds/ Levies	Projected State Match	Impact Fees
<b>Elementary</b>										
Cascade Replacement <sup>6</sup>			\$10.653	\$8.000			\$18.653	\$13.430	\$5.223	
Liberty Replacement <sup>7</sup>			\$11.400	\$6.361			\$17.761	\$12.610	\$5.151	
<b>Middle</b>										
Marysville Middle Modernization				\$6.000	\$24.000	10.061	\$40.061	\$24.818	\$15.243	
<b>High School</b>										
MPHS Phase 1 Modernization				\$30.000	\$40.000	\$20.680	\$90.680	\$64.445	\$26.235	
<b>District-wide</b>										
Tech/Misc Improvements		\$3.000	\$3.000	\$3.000	\$3.000		\$12.000	\$12.000		
<b>TOTALS</b>		<b>\$3.00</b>	<b>\$25.053</b>	<b>\$53.361</b>	<b>\$67.000</b>	<b>30.741</b>	<b>\$179.155</b>	<b>\$127.303</b>	<b>\$51.852</b>	

<sup>6</sup> The cost estimate for the Cascade replacements reflects 87.61% of the estimated cost of construction. This corresponds to the replacement capacity portion of the project.

<sup>7</sup> The cost estimate for the Liberty replacement reflects 83.4% of the estimated cost of construction. This corresponds to the replacement capacity portion of the project.

## ***SECTION SEVEN: 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 (with subsequent amendments).

### ***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 Municipal Code for the City of Marysville. 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 16. *See also* Appendix C.

**Table 16**  
**Student Generation Rates**

	<i>Elementary</i>	<i>Middle Level</i>	<i>High School</i>	<i>TOTAL</i>
Single Family	.235	.106	.147	.487
Multi-Family (1 Bedroom)	No Data	No Data	No Data	No Data
Multi-Family (2+ Bedrooms)	.136	.051	.062	.249

(Source: Doyle Consulting, March 2014)

*Proposed Marysville School District Impact Fee Schedule for Snohomish County and the cities of Everett and Marysville*

Using the variables and formula described, impact fees proposed for the District in Snohomish County and in the cities of Everett and Marysville, using the ordinances' discount rate of 50%, are summarized in Table 17. *See also* Appendix B.

*Table 17  
School Impact Fees  
2014*

<i>Housing Type</i>	<i>Impact Fee Per Dwelling Unit</i>
Single Family	\$1,817
Multi-Family (1 Bedroom)	N/A
Multi-Family (2+ Bedroom)	\$1,180

## FACTORS FOR ESTIMATED IMPACT FEE CALCULATIONS

### Student Generation Factors – Single Family

Elementary	.235
Middle	.106
Senior	.147
<b>Total</b>	<b>.487</b>

### Student Generation Factors – Multi Family (1 Bdrm)

Elementary	.000
Middle	.000
Senior	.000
<b>Total</b>	<b>.000</b>

### Student Generation Factors – Multi Family (2+ Bdrm)

Elementary	.136
Middle	.051
Senior	.062
<b>Total</b>	<b>.249</b>

### Projected Student Capacity per Facility

Elementary School	164
Cascade (70)	
Liberty (94)	

### Required Site Acreage per Facility

Elementary	0
------------	---

### Facility Construction Cost

Elementary	\$6,173,256
Cascade - \$2,638,089	
Liberty - \$3,535,167	

### Permanent Facility Square Footage

Elementary	448,693
Middle	322,567
Senior	540,383
<b>Total</b>	<b>1,311,643</b>
	<b>95.88%</b>

### Temporary Facility Square Footage

Elementary	37,800
Middle	13,800
Senior	4,800
<b>Total</b>	<b>56,400</b>
	<b>4.12%</b>

### Total Facility Square Footage

Elementary	486,493
Middle	336,367
Senior	544,583
<b>Total</b>	<b>1,368,043</b>
	<b>100%</b>

### Average Site Cost/Acre

Elementary	\$0
------------	-----

### Temporary Facility Capacity

Capacity	
Cost	

### State School Construction Assistance

Current Funding Percentage	65.53%
----------------------------	--------

### Construction Cost Allocation

Current CCA	200.40
-------------	--------

### District Average Assessed Value

Single Family Residence	\$208,070
-------------------------	-----------

### District Average Assessed Value

Multi Family (1 Bedroom)	\$64,444
--------------------------	----------

### District Average Assessed Value

Multi Family (2+ Bedroom)	\$94,676
---------------------------	----------

### SPI Square Footage per Student

Elementary	90
Middle	108
High	130

### District Property Tax Levy Rate (Bonds)

Current/\$1,000	\$1.25
-----------------	--------

### General Obligation Bond Interest Rate

Current Bond Buyer Index	4.38%
--------------------------	-------

### 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.



APPENDIX A

*POPULATION AND ENROLLMENT DATA*

Prepared: 4/1/2013

**MARYSVILLE SCHOOL DISTRICT**  
**ENROLLMENT PROJECTION**  
**INDIVIDUAL GRADE LEVEL**  
**2013 TO 2016**

(Oct, Headcount; excl. running start)												COHORT FACTOR	GROWTH FACTOR PER YEAR				
2002	2003	2004	2005	2006	2007	2008	2009	2010	2011	2012	2013			2014	2015	2016	
K	815	781	876	804	860	836	834	883	851	855	898	2013-2016	926	892	867	857	
1	857	818	852	939	852	915	883	859	890	861	830		99.00%	894	922	888	863
2	923	821	860	890	968	882	907	871	843	879	860	100.0%	822	885	913	880	
3	897	856	818	882	909	948	894	904	846	830	857	98.2%	845	807	870	896	
4	995	849	887	856	881	908	933	886	899	858	834	101.2%	2017-2027	858	846	808	871
5	969	956	837	919	895	878	913	917	874	885	844	99.5%		99.50%	821	845	833
Subtl	5,456	5,081	5,130	5,290	5,365	5,367	5,364	5,320	5,203	5,168	5,123		5,166	5,198	5,179	5,163	
6	988	921	932	847	921	872	840	879	891	853	845	97.5%	815	793	816	804	
7	939	940	941	942	897	915	875	851	859	903	874	101.7%	851	821	799	822	
8	918	894	969	941	910	896	913	866	831	852	895	100.0%	866	843	813	791	
Subtl	2,843	2,755	2,842	2,730	2,728	2,683	2,628	2,598	2,581	2,608	2,614		2,531	2,456	2,427	2,417	
9	1113	917	929	990	949	912	902	881	852	838	876	100.9%	894	865	842	812	
10	848	948	950	1043	956	950	911	874	892	900	854	102.2%	887	905	875	852	
11	805	799	818	807	876	875	897	849	862	842	821	94.3%	798	828	845	818	
12	751	718	763	723	926	1032	963	980	967	943	900	110.1%	895	869	903	922	
Subtl	3,517	3,382	3,460	3,563	3,707	3,769	3,673	3,584	3,593	3,523	3,451		3,473	3,468	3,466	3,404	
<b>Totals</b>	<b>11,816</b>	<b>11,218</b>	<b>11,432</b>	<b>11,583</b>	<b>11,800</b>	<b>11,819</b>	<b>11,665</b>	<b>11,500</b>	<b>11,377</b>	<b>11,299</b>	<b>11,188</b>		<b>11,171</b>	<b>11,122</b>	<b>11,072</b>	<b>10,983</b>	
Change	-116	-598	214	151	217	19	-154	-165	-123	-78	-111		-17	-49	-50	-68	
% Change	-0.97%	-5.06%	1.91%	1.32%	1.87%	0.16%	-1.30%	-1.41%	-1.07%	-0.69%	-0.98%		-0.15%	-0.44%	-0.45%	-0.60%	

\*Projections use headcount figures.

Prepared: 4/1/2013

**MARYSVILLE SCHOOL DISTRICT**  
**ENROLLMENT PROJECTION**  
**INDIVIDUAL GRADE LEVEL**  
**2017 TO 2027**

	2017	2018	2019	2020	2021	2022	2023	2024	2025	2026	2027
K	883	883	887	890	894	901	909	917	926	934	942
1	857	883	884	888	891	894	902	910	918	926	935
2	859	853	879	880	883	887	890	898	906	914	922
3	868	848	842	868	869	872	875	879	886	894	902
4	902	874	853	848	874	874	878	881	884	892	900
5	862	893	865	845	839	865	865	869	872	875	883
Subtl	5,232	5,235	5,211	5,218	5,249	5,293	5,320	5,354	5,392	5,435	5,483
6	772	836	866	839	819	814	839	839	843	846	849
7	814	782	847	877	850	830	824	849	850	853	856
8	818	810	778	843	873	846	826	820	845	846	849
	2,404	2,428	2,491	2,559	2,542	2,489	2,488	2,509	2,538	2,545	2,555
9	794	822	814	782	846	877	849	829	824	849	850
10	826	808	838	828	795	861	892	864	843	838	863
11	800	775	758	784	777	746	808	837	811	792	787
12	896	877	850	831	859	851	818	885	917	888	867
Subtl	3,316	3,281	3,257	3,225	3,278	3,335	3,367	3,416	3,395	3,367	3,367
<b>Totals</b>	<b>10,952</b>	<b>10,945</b>	<b>10,959</b>	<b>11,001</b>	<b>11,069</b>	<b>11,118</b>	<b>11,175</b>	<b>11,278</b>	<b>11,325</b>	<b>11,347</b>	<b>11,405</b>
Change	-31	-7	14	42	67	49	58	103	47	22	58
% Change	-0.28%	-0.07%	0.13%	0.38%	0.61%	0.44%	0.52%	0.92%	0.42%	0.19%	0.51%

**APPENDIX B**

**SCHOOL IMPACT FEE CALCULATIONS**

SCHOOL IMPACT FEE CALCULATIONS									
DISTRICT	Marysville School District								
YEAR	2014								
JURISDICTION	City of Marysville and Snohomish County								
School Site Acquisition Cost:									
((Acres*Cost per Acre)/Facility Capacity)*Student Generation Factor									
	Facility	Cost/	Facility	Student	Student	Student	Cost/	Cost/	Cost/
	Acres	Acres	Capacity	Factor	Factor	Factor	SFR	MFR (1)	MFR (2+)
Elementary	20.00	\$ -	450	0.235	0.000	0.136	\$0	\$0	\$0
Middle	20.00	\$ -	450	0.106	0.000	0.051	\$0	\$0	\$0
High	40.00	\$ -	1,600	0.147	0.000	0.062	\$0	\$0	\$0
						TOTAL	\$0	\$0	\$0
School Construction Cost:									
((Facility Cost/Facility Capacity)*Student Generation Factor)*permanent/Total Sq Ft)									
	%Perm/	Facility	Facility	Student	Student	Student	Cost/	Cost/	Cost/
	Total Sq.Ft.	Cost	Capacity	Factor	Factor	Factor	SFR	MFR (1)	MFR (2+)
Elementary	95.88%	\$ 6,173,256	164	0.235	0.000	0.136	\$8,481	\$0	\$4,908
Middle	95.88%	\$ -	200	0.106	0.000	0.051	\$0	\$0	\$0
High	95.88%	\$ -	1,600	0.147	0.000	0.062	\$0	\$0	\$0
						TOTAL	\$8,481	\$0	\$4,908
Temporary Facility Cost:									
((Facility Cost/Facility Capacity)*Student Generation Factor)*Temporary/Total Square Feet)									
	%Temp/	Facility	Facility	Student	Student	Student	Cost/	Cost/	Cost/
	Total Sq.Ft.	Cost	Size	Factor	Factor	Factor	SFR	MFR (1)	MFR (2+)
Elementary	4.12%	\$ -	24	0.235	0.000	0.136	\$0	\$0	\$0
Middle	4.12%	\$ -	26	0.106	0.000	0.051	\$0	\$0	\$0
High	4.12%	\$ -	26	0.147	0.000	0.062	\$0	\$0	\$0
						TOTAL	\$0	\$0	\$0
State Matching Credit:									
Boeckh Index X SPI Square Footage X District Match % X Student Factor									
	Boeckh	SPI	District	Student	Student	Student	Cost/	Cost/	Cost/
	Index	Footage	Match %	Factor	Factor	Factor	SFR	MFR (1)	MFR (2+)
Elementary	\$ 200.40	90	65.53%	0.235	0.000	0.136	\$2,777	\$0	\$1,607
Junior	\$ 200.40	108	0.00%	0.106	0.000	0.051	\$0	\$0	\$0
Sr. High	\$ 200.40	130	0.00%	0.147	0.000	0.062	\$0	\$0	\$0
						TOTAL	\$2,777	\$0	\$1,607
Tax Payment Credit:									
Average Assessed Value							SFR	MFR (1)	MFR (2+)
Capital Bond Interest Rate							\$208,070	\$64,844	\$94,676
Net Present Value of Average Dwelling							4.30%	4.30%	4.30%
Years Amortized							\$1,656,157	\$512,949	\$753,584
Property Tax Levy Rate for Bonds							10	10	10
							\$1.25	\$1.25	\$1.25
	Present Value of Revenue Stream						\$2,070	\$641	\$942
Fee Summary:									
				Single	Multi-	Multi-			
				Family	Family (1)	Family (2+)			
Site Acquisition Costs				\$0	\$0	\$0			
Permanent Facility Cost				\$8,481	\$0	\$4,908			
Temporary Facility Cost				\$0	\$0	\$0			
State Match Credit				(\$2,777)	\$0	(\$1,607)			
Tax Payment Credit				(\$2,070)	(\$641)	(\$942)			
FEE (AS CALCULATED)				\$3,634	\$0	\$2,359			
FEE (DISCOUNTED 50%)				\$1,817	\$0	\$1,180			

**APPENDIX C**

**STUDENT GENERATION RATES (SGR)**



**DOYLE  
CONSULTING**

ENABLING SCHOOL DISTRICTS TO MANAGE AND USE STUDENT ASSESSMENT DATA

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## **Student Generation Rate Study for the Marysville School District**

4/11/14

(With Grade Levels K-5, 6-8, and 9-12)

This document describes the methodology used to calculate student generation rates (SGRs) for the Marysville School District, and provides results of the calculations.

SGRs were calculated for two types of residential construction: Single family detached, and multi-family with 2 or more bedrooms. Attached condominiums, townhouses and duplexes are included in the multi-family classification since they are not considered "detached". Manufactured homes on owned land are included in the single family classification.

1. Electronic records were obtained from the Snohomish County Assessor's Office containing data on all new construction within the Marysville School District from January 2006 through December 2012. As compiled by the County Assessor's Office, this data included the address, building size, assessed value, and year built for new single and multi-family construction. The data was "cleaned up" by eliminating records which did not contain sufficient information to generate a match with the District's student record data (i.e. incomplete addresses).
2. The District downloaded student records data into Microsoft Excel format. This data included the addresses and grade levels of all K-12 students attending the Marysville School District as of February 2014. Before proceeding, this data was reformatted and abbreviations were modified as required to provide consistency with the County Assessor's data.

- J. **Single Family Rates:** The data on all new single family detached residential units in County Assessor's data were compared with the District's student record data, and the number of students at each grade level living in those units was determined. The records of 2,340 single family detached units were compared with data on 11,297 students registered in the District, and the following matches were found by grade level(s):

GRADE(S)	COUNT OF MATCHES	CALCULATED RATE
K	107	0.045
1	106	0.045
2	57	0.023
3	22	0.009
4	53	0.025
5	24	0.042
6	42	0.035
7	53	0.035
8	22	0.036
9	66	0.037
10	55	0.038
11	92	0.035
12	50	0.036
K-5	519	0.225
6-8	247	0.126
9-12	314	0.147
K-12	1140	0.467

4. **Large Multi-Family Developments:** Snohomish County Assessor's data does not specifically indicate the number of units or bedrooms contained in large multi-family developments. Additional research was performed to obtain this information from specific parcel ID searches, and information provided by building management, when available. Information obtained included the number of 0-1 bedroom units, the number of 2+ bedroom units, and specific addresses of 0-1 bedroom units. If specific addresses or unit numbers of 0-1 bedroom units were not provided by building management, the assumption of matches being 2+ bedroom units was made. This assumption is supported by previous SGR studies.

**Small Multi-Family Developments:** This method included all developments in the County Assessor's data containing four-plexes, tri-plexes, duplexes, condominiums and townhouses. This data contained information on the number of bedrooms for all townhouses and condominiums. Specific parcel ID searches were performed for duplex and larger units in cases where number of bedroom data was missing.



5. **Multi-Family 2+ BR Rates:** The multi-family 2+ BR SGR's were calculated by comparing data on 2+ BR multi-family units with the District's student record data, and the number of students at each grade level living in those units was determined. The records of 177 multi-family 2+ BR units were compared with data on 11,297 students registered in the District, and the following matches were found by grade level(s)\*:

GRADE(S)	COUNT OF MATCHES	CALCULATED RATE
K	4	0.023
1	4	0.023
2	10	0.068
3	1	0.006
4	2	0.011
5	3	0.017
6	3	0.017
7	3	0.017
8	3	0.017
9	3	0.017
10	3	0.017
11	3	0.017
12	2	0.011
K-5	24	0.136
6-8	9	0.061
9-12	11	0.062
K-12	44	0.245

6. **Multi-Family 0-1 BR Rates:** Research indicated that 6 multi-family 0-1 BR units were constructed within District boundaries during the time period covered by this study. These units were compared with the data on 11,297 students registered in the District. No specific unit number matches were made.

7. **Summary of Student Generation Rates<sup>22</sup>:**

	K-5	6-8	9-12	K-12
Single Family	.135	.106	.147	.487
Multi Family 2+ BR	.136	.051	.062	.249

\*Calculated rates for grade level groups may not equal the sum of individual grade rates due to rounding.

MONROE SCHOOL  
DISTRICT NO. 103  
CAPITAL FACILITIES PLAN  
2014– 2019

*prepared for:*

Snohomish County  
Planning Department

*And*

City of Monroe

June, 2014

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

## **BOARD OF DIRECTORS**

Katy Woods  
Jason Hutchinson  
Nancy Truitt Pierce  
Darcy Cheesman  
Jim Scott

## **SUPERINTENDENT**

Dr. Ken Hoover

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) 804-2501.

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## CHAPTER 1 -- INTRODUCTION

Monroe School District's Capital Facilities Plan (CFP) is intended to provide the District, City of Monroe, Snohomish County and other jurisdictions with a description of facilities needed to accommodate projected student enrollment at acceptable levels of service over the next 21 years (2014-2035), as well as a more detailed schedule and financing program for capital improvement over the next six years (2014-2019). In accordance with the Growth Management Act this CFP contains the following required elements:

- 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 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 with 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 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 82 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 also a major traffic link between Monroe, Duvall, Carnation and the Redmond/Bellevue areas.

The District currently serves a student population of 6,436 (October 1, 2013) with five elementary school campuses, two middle schools, 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 students in grades K-12 who otherwise would be home schooled, is housed in a former middle school. 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 five. Middle schools serve grades six through eight and the high school grades nine through twelve. Leaders in Learning serves grades nine through twelve.

WAVA High School, a virtual high school for students in grades 9-12, is operated by the District. The District also provides fiscal and administrative support for the Youth Re-Engagement program housed off-site at Everett Community College in Everett, Washington. It also provides a graduate retrieval program through Shoreline Community College. The WAVA High School, the graduate retrieval program and U-3 program enrollment figures are included in the OSPI figures.

The enrollment figures for these programs are not included when determining the District's facility needs in Chapter 6. The total capacity-related FTE count for 2013 was 5,334 students vs. the 6,436 Headcount total.

### **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 aging school facilities, the rate of student growth, the availability and affordability of suitable school sites, including perkable soil for septic systems, access to water and the geographic constraints associated with the increased student population.

The District is currently in the process of evaluating projected usages and use possibilities for the District office, Marshall Baseball Field and the Memorial Stadium. These properties do not directly affect student housing.

The consolidation of three middle schools into two sites and the conversion of the third site to house the Sky Valley education program reduce space available for growth. When the district experiences significant growth, housing will quickly become a critical issue.

## 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 30.66C. 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 for all residential units constructed within the district.

Area Cost Allowance (Boeckh Index) - means the current OSPI construction allowance for construction costs for each school type.

Boeckh Index - means the number generated by the E. H. Boeckh Company and used by OSPI as a guideline for determining the area cost allowance for new school construction.

Capital Facilities - means school facilities identified in a 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 30.66C and meeting the requirements of the GMA.

City - means City of Monroe.

Council(s) - means the Snohomish County Council and/or the Monroe City 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 or City of Monroe.

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 or City 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, or the City of Monroe Community Development Director or a designee.

District - means a school district whose geographic boundaries include areas within Snohomish County. For this CFP, "District" is the Monroe School District unless otherwise indicated.

District Property Tax Levy Rate (for Bonds) - 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 of 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, junior high, and high school).

Growth Management Act I 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 Snohomish County Ordinance 30.66C or City of Monroe's Municipal Code Section 18.02.470

OFM -means the Washington State Office of Financial Management.

OSPI -means the Washington State Office of the Superintendent of Public Instruction.  
Permanent Facilities - means school facilities of the District with a fixed foundation. RCW - means the Revised Code of Washington (a state law).

Relocatable Facilities (Portables) - 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 -means the 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, middle, high school) that the 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.

Un-housed Students -means 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 -means the Washington Administrative Code.

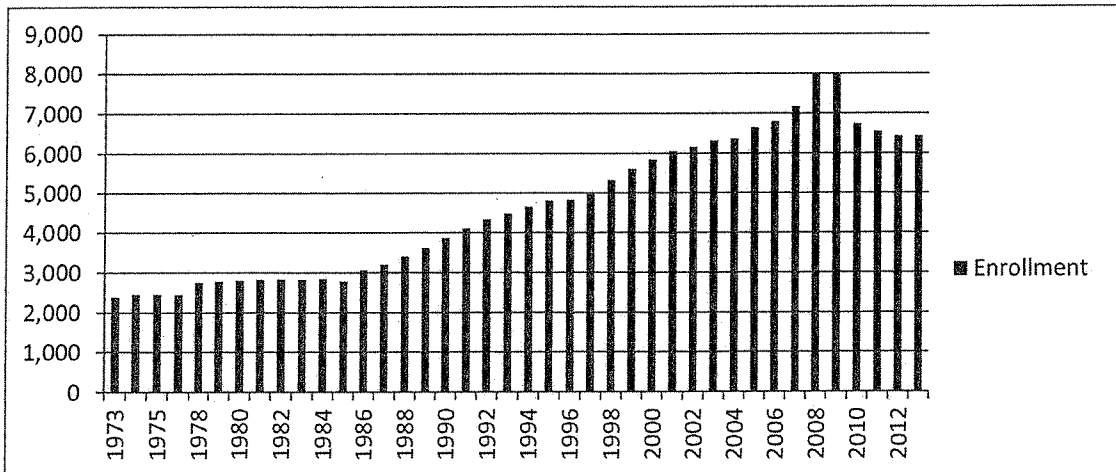
## CHAPTER 3 -- STUDENT ENROLLMENT TRENDS AND PROJECTIONS

### HISTORICAL TRENDS

Student enrollment records dating back to 1973 were available from Snohomish County and OSPI. Student enrollment in the Monroe School District remained relatively constant between 1973 and the mid-1980's. Enrollment within the District increased dramatically from 1985-2009 (7,974 Headcount), then declined to 6,436 students in October 2013 (See Figure 1).

Facility needs are determined in part by evaluating recent trends in Full Time Equivalent (FTE) student enrollment. OSPI lists the 2013 FTE enrollment as 6,226 factoring in ½ day Kindergarten. Subtracting the non-resident WAVA, U-3 and CC programs<sup>1</sup>, the October 2013 FTE enrollment was 5,334 (See Table 1), an increase over the net 5,025 figure in the 2012 CFP.

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



### RECENT TRENDS - FTE STUDENT ENROLLMENT (TABLE 1)

FTE enrollment in elementary grades K-5 between 2008 and 2013 experienced a decline of 336 students (-12.1%). At the middle school level (grades 6-8), enrollment decreased by 186 students (13.4%). FTE on-site enrollment at the high school level (grades 9-12) decreased by 791 students (-52.5%) overall. The overall FTE, capacity-related enrollment declined by 1,312 (-24.6%). This was due in part to OSPI changing the rules in 2009 regarding which students could be counted for enrollment projection purposes. This resulted in a substantial drop in

<sup>1</sup> WAVA is an offsite internet based school program. Students do not use District facilities, but are enrolled, monitored and tested through this program for their schooling. U3 and CC programs are both off site credit retrieval programs to allow student to complete their high school education. These are provided by two separate community colleges in cooperation with the District. Students are enrolled through the District in cooperation with the college but do not attend at the Districts facilities.

recorded enrollment on the OSPI report 1049. The Report-1049 enrollment for the 9-12 grade bands went from 3458 to 2632.

Historical enrollment in the WAVA, U-3 and CC programs grew rapidly at the start of these programs, but has dropped off over time. There has been a great effect on district recorded enrollment as OSPI changed the funding and housing rules around 2009. Future enrollment is expected to remain nearly steady over the next 6 years.

**Table 1- Total Student Enrollment  
Monroe School District 2008-2013  
(Total and FTE)**

<b>Monroe</b>	<b>2008</b>	<b>2009</b>	<b>2010</b>	<b>2011</b>	<b>2012</b>	<b>2013</b>	<b>Change</b>
<b>K-5 Headcount</b>	2977	2993	2734	2611	2623	2647	-330
K-5 FTE	2772	2795	2534	2425	2409	2437	-336
<b>6-8 Headcount</b>	1577	1523	1379	1389	1401	1391	-186
<b>9-12 Headcount</b>	3434	3458	2632	2549	2414	2398	-1036
9-12 FTE	2297	2103	1272	1211	1454	1506	-791
<b>K-12 Headcount</b>	7988	7974	6745	6549	6438	6436	-1552
K-12 FTE	7783	7776	6545	6363	6224	6226	-1557
<i>Off-Site</i>	1,137	1,355	1,360	1,338	960	892	-245
<b>Capacity FTE</b>	6,646	6,421	5,185	5,025	5,264	5,334	-1312

**PROJECTED STUDENT ENROLLMENT 2014-2019**

Two enrollment forecasts were conducted for the Monroe School District and are shown in Tables 2-3. The first (Table 2) presents the OSPI forecasts. Both it and the trends analysis (Table 3) consider total enrollment with and without the WAVA and other programs not requiring a physical location in school facilities. “Capacity FTE” directly affects classroom need.

The Office of the Superintendent of Public Instruction (OSPI) method estimates future enrollment using a modified cohort survival method. This method estimates how many students in one year will attend the next grade in the following year. Table 2 shows the OSPI forecast distributed by Elementary, Middle and Senior High grade levels.

The OSPI methodology does not fully account for other growth indicators in local districts. The OFM Trend Analysis (Table 3) is an estimate based, in part, upon Snohomish County population estimates as provided by the State Office of Financial Management (OFM) and distributed to the school district level. The Growth Management Act requires that planning for public facilities be based on the 20-year population projections developed by the OFM. OFM population-based enrollment projections have been estimated using the revised Population Forecast for the School District prepared by the Snohomish County Department of Planning and Development Services and OFM population forecasts for Snohomish County.

The County forecasted three population totals for the District:

	<u>2019</u>	<u>2035</u>
Alternative 1:	39,687	44,380
Alternative 2:	39,769	44,681
Alternative 3:	39,763	44,659

These are currently under review by the County. The District has selected Alternative 2 for its CFP update.

For this CFP, Table 3 applied an adjustment to the OSPI forecast to reflect a more aggressive enrollment growth rate, while accepting the population growth rate issued by the County (Alt. 2). Contact by the District with local permit agencies indicates increased residential building activity that it believes will generate a higher student population than assumed in the OSPI methodology.

**Table 2- OSPI Total FTE Student Enrollment Projections  
Monroe School District 2013-2019  
(Total and FTE Adjusted)**

Monroe	2013	2014	2015	2016	2017	2018	2019
<b>K-5 Headcount</b>	2,647	2,615	2,629	2,626	2,675	2,712	2,727
<b>K-5W/K @ 1/2</b>	2,437	2,407	2,419	2,414	2,461	2,496	2,510
<b>6-8 Headcount</b>	1,391	1,334	1,282	1,279	1,209	1,198	1,193
<b>9-12 Headcount</b>	2,398	2,281	2,088	2,066	2,131	2,000	1,949
<b>9-12 FTE</b>	1,506	1,389	1,196	1,174	1,239	1,108	1,057
<b>K-12 Headcount</b>	6,436	6,230	5,999	5,971	6,015	5,910	5,869
<b>K-12 FTE</b>	6,226	6,022	5,789	5,759	5,801	5,694	5652
<b>Off-Site</b>	892	892	892	892	892	892	892
<b>Capacity FTE</b>	5,334	5,130	4,897	4,867	4,909	4,802	4,760

For Table 3, adjustments were made by calculating the OSPI forecast as a percentage of population, then increasing this ratio by 1.25 percentage points. For example, the 2019 OSPI K-12 Headcount projection of 5,869 (Table 2) is 14.76% of the total estimated population of the District (39,769 – County Alternative 2). For the Trends analysis (Table 3), this percentage was increased to 16.01%. This produced a K-12 Headcount total of 6,366. This increase reflects the District’s view that a higher proportion of Monroe’s 2019 population will be student-aged. It also holds to the County’s official population estimate.

From these totals, grade level and FTE totals were calculated. Adjusting for half-day kindergarten students has consistently produced a 92% FTE portion of total K-5 Headcount. Further, the District believes that its WAVA, U3 and CC programs will even off at 2013 totals.

This 2013 enrollment total was held constant through 2019.

Based on the District's OFM Trends Analysis, FTE student enrollment through 2019 is projected to increase at the elementary level (285) and decrease at the middle school (-97) and high school (-339) levels.

**Table 3 - OFM-Based Enrollment Projections  
Monroe School District 2013-2019  
(Total and FTE Adjusted)**

Monroe	2013	2014	2015	2016	2017	2018	2019
<b>K-5 Headcount</b>	2,647	2,697	2,811	2,818	2,846	2,934	2,958
<b>K-5W/K @ 1/2</b>	2,437	2,496	2,623	2,629	2,654	2,748	2,772
<b>6-8 Headcount</b>	1,391	1,376	1,371	1,372	1,286	1,296	1,294
<b>9-12 Headcount</b>	2,398	2,352	2,233	2,217	2,268	2,164	2,114
<b>9-12 On-Site FTE</b>	1,506	1,441	1,297	1,279	1,336	1,220	1,167
<b>K-12 Headcount</b>	6,436	6,425	6,415	6,407	6,400	6,395	6,367
<b>K-12 FTE</b>	6,226	6,224	6,226	6,219	6,208	6,209	6,180
<b>Off-Site</b>	892	888	880	880	878	871	872
<b>Capacity Related FTE</b>	5,334	5,336	5,346	5,339	5,330	5,338	5,308

**2035 STUDENT ENROLLMENT PROJECTIONS**

Student enrollment projections beyond 2019 are highly speculative. For the CFP the District used the average percentage of students-to-population for the 2013-2019 OFM-based forecast period (16.64% Headcount; 13.80% FTE). The grade span distribution was similarly based on averages from 2013-2019.

**Table 4 - Monroe School District FTE Year  
2035**

<b><u>District</u></b>	
Total (K-12)	<b>7,434</b>
Elementary (K-5)	3,268
Middle School (6-8)	1,556
High School (9-12)	2,610
<b><u>Capacity Related</u></b>	
Total (K-12)	<b>6,168</b>
Elementary (K-5)	3,052
Middle School (6-8)	1,579
High School (9-12)	1,536

Again, 2035 estimates are highly speculative and are used only for general planning purposes.

## 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 non-traditional or special programs such as special education, bilingual education, remediation programs, migrant education, alcohol and drug education, AIDS education, preschool, extended day kindergarten 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.

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, behavioral and behavioral support
- ELL/ESL
- Title I I L A P
- Drug and Alcohol Education
- Community Schools
- Vocational and Technical Education
- Technology Education
- Music
- Day Care - before and after school
- Computer Labs
- Birth to Three Programs
- Excel
- Adopt-A-Stream
- Outdoor Education
- Horticulture
- Multi-age classrooms
- Special Education 18 to 21 year old transitional program
- Full Day Kindergarten<sup>2</sup>

Variations in student capacity among schools are often a result of what special or nontraditional

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<sup>2</sup> The District currently has both full time and half time kindergarten in some schools where space and parent desires for the program permit its implementation.



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 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. As indicated earlier in this revision, a grade level reconfiguration again took place in September 2005 with the completion of a new elementary school and additions to Hidden River Middle School and Monroe High School.

There is discussion of a potential Full Time Kindergarten requirement beginning in 2018. The District currently has both full time and half time kindergarten in some schools where space and parent desires for the program permit its implementation. The District will move to all day kindergarten as the State provides funding for it. Right now that is attached to the percentage of free and reduced price lunch eligible students at the school. One school is currently eligible. The next highest percentage is may become eligible in the upcoming biennium. Other elementary schools will probably be farther out.

Regarding the projected future eligibility of schools for all day kindergarten the District would have to purchase and install portables, build a modular structure, or add on to the building. The District should have enough funding for portables, may or may not have enough for a stand-alone modular structure, and would need bond funds for an addition to buildings. The Board of Directors will have to determine whether to include funding for a permanent addition to buildings in the possible 2015 construction bond issue.

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 24 students. Class size for grade 5 should not exceed 28 students.
- Special Education for students will 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 (computer labs can be stationary dedicated spaces, or mobile laptop labs).
- Optimum design capacity for new elementary schools is 500-550 students. However, actual

capacity of individual schools may vary depending on the educational programs offered.

### **EDUCATIONAL PROGRAM STANDARDS FOR MIDDLE AND HIGH SCHOOLS**

- Class size for middle 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 will 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, science, family and consumer science, physical education, technology education).

Desired design capacity for new middle schools is 800 to 850 students. However, actual capacity of individual schools may vary depending on the educational programs offered and/or geographic area served.

Desired design capacity for new comprehensive high schools is 1,600-1800 students. However, actual capacity of individual schools may vary depending on the educational programs offered.

### **MINIMUM EDUCATIONAL SERVICE STANDARDS**

The Monroe School District will evaluate student housing levels based on the District as a whole system and not on a school by school or site by site basis. This may result in portable classrooms being used as interim housing, attendance boundary changes or other program changes to balance student housing across the system as a whole.

The Monroe School District has set minimum educational service standards based on several criteria. Exceeding these minimum standards will trigger significant changes in program delivery. If there are 2,092 FTE or more students in K-4 classrooms, or 4,868 or more students in grade 5-12 classrooms, the minimum standards have not been met. 2013 levels are 1,974 FTE K-4 and 4,252 FTE 5-12, thus current LOS standards have been met.

Although they may meet the number criteria above, double shifting with reduced hours or "Year Round Education" programs adopted for housing reasons would also not meet the minimum standards.

It should be noted that the minimum educational standard is just that, a minimum, and not the desired or accepted operating standard.

## 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.<sup>2</sup> 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 five elementary school campuses serving grades K-5 including a portion of Wagner Center, formerly Frank Wagner Elementary East as a part of the Frank Wagner Elementary complex, two middle schools serving grades 6-8 and one high school serving grades 9-12. Leaders in Learning, an individualized secondary program is offered in a portion of Wagner Center. Sky Valley Education Center, a grades 1-12 individualized parent partnership program is housed in the old Monroe Middle School site. Monroe Middle School students and staff have been consolidated into the other two middle schools.

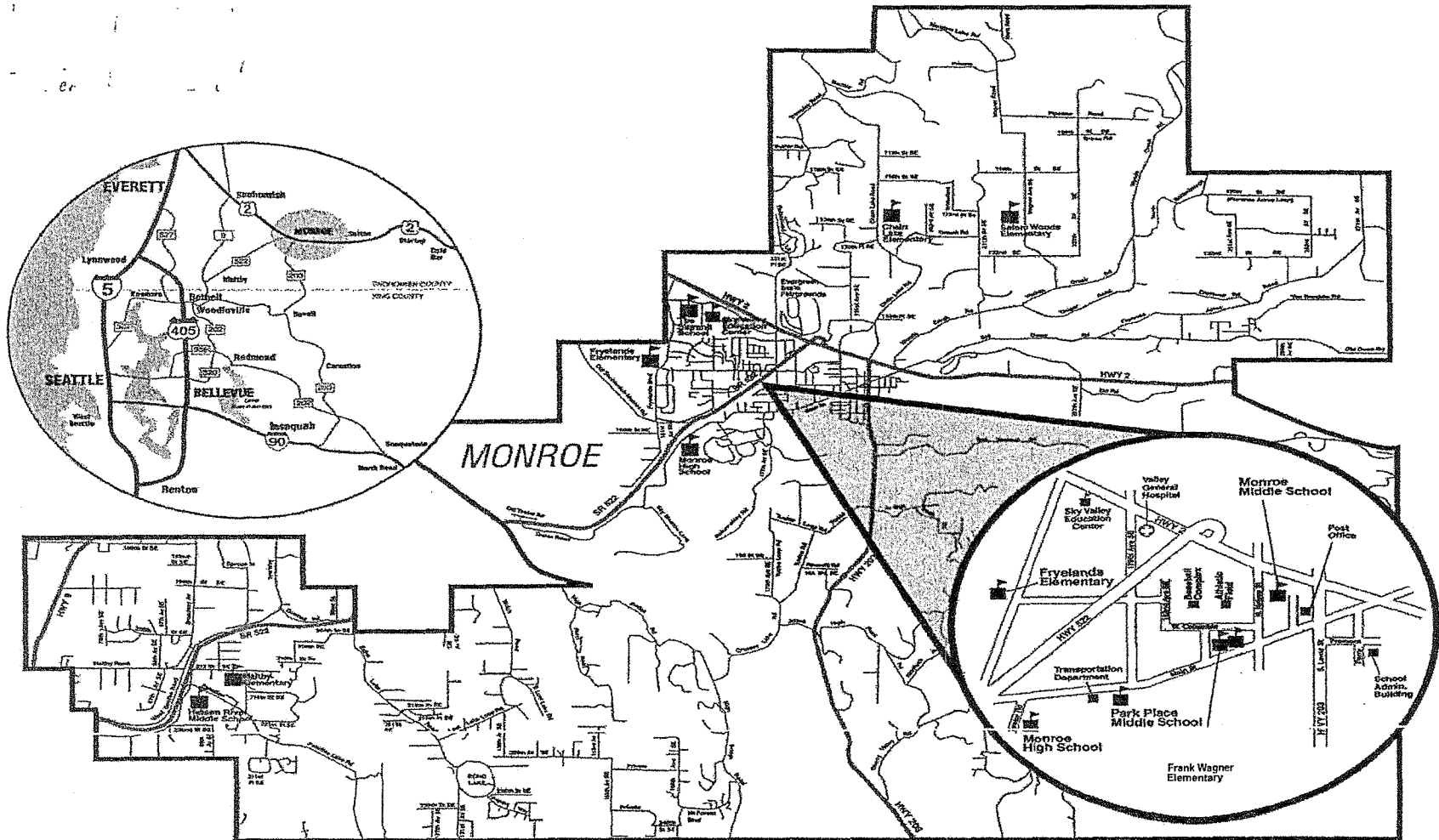
WAVA High School (a virtual high school), the U3 Program and a graduate retrieval program through Shoreline Community College do not require District housing.

The State (OSPI) calculates school capacity by dividing gross square footage of a building by a standard square footage per student (i.e. 90 square feet per kindergarten through sixth grade student, 117 square feet per grade seven and grade eight student, 130 square feet per grade nine through grade twelve student, and 144 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 2014 school facility inventory is summarized in Tables 5, 6 and 7.

<sup>2</sup> 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 2 - EXISTING SCHOOL DISTRICT FACILITIES



**Table 5 - 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	46,207	21	506	492	1990	yes**
Frank Wagner	10.21	46,418	22	494	468	1989	yes
Wagner Center	5.27	13,250	4	124	100	1980	yes
Fryelands	7.09	54,074	22	601	496	2005	no
Maltby	10	50,230	25	481	564	2005	yes
Salem Woods	10	38,338	20	419	468	1980	no*
SVEC (part) ***	6	34,848	15	299	375	1980	no
<b>Totals</b>	<b>62.97</b>	<b>283,365</b>	<b>129</b>	<b>2,924</b>	<b>2,963</b>		

\* Septic system capacity limits expansion    \*\* Holding tank capacity limits expansion

\*\*\* Sky Valley Ed Center capacities prorated by daily usage.

**Table 6 - 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
Park Place Middle	19.4	109,912	42	959	935	1991	yes
Hidden River	20	60,688	20	570	442	2005	yes
SVEC (part) **		22,949	9	207	252	1980	no
<b>Totals</b>	<b>39.4</b>	<b>193,549</b>	<b>71</b>	<b>1,736</b>	<b>1,629</b>		

\* Calculated at 83% room utilization

\*\* Sky Valley Ed Center capacities prorated by daily usage.

**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	209,432	74	1,603	1718	2005	yes
Leaders In Learning*	n/a	14,250	7	135	196	1980	yes
SVEC (part) ***		27,199	9	226	252	1980	no
<b>Totals</b>	<b>33</b>	<b>250,881</b>	<b>90</b>	<b>1,964</b>	<b>2,166</b>		

\* Leaders in Learning is located in a portion of Wagner Center    \*\*\* Sky Valley Ed Center capacities prorated by daily usage.

\*\* Calculated at 90% room utilization

## RELOCATABLE CLASSROOM FACILITIES (PORTABLES)

Relocatable classroom facilities (portables) are used as interim classroom space to house students until construction of permanent classroom facilities takes place. Therefore, these facilities are not included in the school capacity calculations provided in Tables 5, 6 and 7. The Monroe School District currently uses 40 portables with 36 located at various school sites throughout the District providing additional interim capacity. A typical portable classroom provides capacity for 24 to 28 students - depending on the grade level and the program being housed. Current use of portables throughout the District is summarized in Table 8.

**Table 8 - Relocatable Classroom (Portable) Inventory  
2014**

	Number of Portables	Interim Student Capacity Provided	Building Area (Sq. Ft.)
Chain Lake Elementary	6	150	5,358
Frank Wagner Elementary	8	175	7,144
Salem Woods Elementary	3	75	2,679
Hidden River Middle	5	140	6,468
Monroe Middle	2		1,786
Park Place Middle*	6	112	4,465
Monroe High School	6	168	5,358
Preschool/Head Start	3	40	2,679
Transportation	1	0	893
	40	860	36,830

\* Two portables for Life Skills

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. The District continues to survey its portables to determine how many can be moved to another site without damaging the portable beyond use. However, several of the portables have been purchased during the last ten years. These portables can and will be moved from time to time to meet instructional needs and to provide interim student housing, as the need arises.

## 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	Building Area (sq)
District Admin Office and Warehouse	3.5	21,584
Maintenance Shops	0.2	5,459
Transportation	3.4	6,612
Totals	7.1	33,655

**LAND INVENTORY**

The Monroe School District owns one undeveloped parcel of 14.5 acres adjacent to Chain Lake Elementary. The District had intended to build a middle school on the 14.5 acres located at this site. However, there are substantial wetlands and buffer zone requirements. The site cannot be used for a middle school. There appears to be sufficient usable space to add a classroom addition to Chain Lake Elementary School.

The District purchased a 13+ acre piece of property on the Old Owen corridor in 2007. The property will be used for an elementary school.

The District owns other sites which are unsuitable for school buildings inasmuch as they do not have the acreage necessary to support even an elementary school. They are: 1) A 2.7 acre piece in the Lake Fontal area donated to the District in the early 1900's; and 2) 2.54 acres within a residential area of Monroe which is currently being used as the Park Place Baseball Field.

A 33+ acre site deeded to the District by the BPA property is located in the Sultan School District.

The District will need additional schools in the area north of Highway 2 to meet long-range needs associated an increasing population in this area. Sites for schools north of Highway 2 should be purchased while property may still be available. Funds to purchase school sites were not included in a bond issue placed before the electorate in 2010.

**CHAPTER 6 – PROJECTED FACILITY NEEDS**

**NEAR-TERM FACILITY NEEDS ( THROUGH 2019)**

*Current* enrollment at each grade level is identified in Table 1 which provides the actual enrollment as of October 1, 2013. *Projected* available student capacity was derived by subtracting projected FTE student enrollment from existing October, 2013 school capacity (Tables 5-7). 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<sup>3</sup>.

To determine future facility needs, existing school program capacity was compared to projected enrollment throughout the six-year forecast period. The District currently has no capacity deficiencies (Table 10).

**Table 10  
Available Student Capacity Monroe  
School District 2013-2019  
(Excludes WAVA & U3 Enrollment)**

<b>Grade Span</b>	<b>2013 Enrollment</b>	<b>2019 Enrollment</b>	<b>2013 Capacity</b>	<b>2013 Surplus</b>	<b>2019 Surplus</b>
Elementary K-5	2,437	2,772	2,963	527	191
Middle 6-8	1,391	1,294	1,629	238	335
High School 9-12	1,506	1,167	2,166	660	999
<b>Total</b>	<b>5,334</b>	<b>5,233</b>	<b>6,758</b>	<b>1,424</b>	<b>1,525</b>

The District's six-year capital improvement plan includes capacity projects identified in Table 12 to address existing and future needs. The District, in consultation with the City of Monroe and a Community Long Range Planning Committee, has concluded that those improvements are warranted based on a higher enrollment forecast than depicted on Table 10. It views the OSPI and County forecasts as understating future enrollments and capital facility needs. That being said, however, the capacity "surplus" indicated on Table 10 precludes assessment of impact fees by the District.

<sup>3</sup> Information on portables and interim capacity can be found in Table 8.



## LONG TERM NEEDS

Growth is occurring throughout the District, with most of it occurring within and north of the City of Monroe. Long-range projections indicate a capacity deficiency at the elementary school level by 2035.

The total number of students projected for the Monroe School District in 2035 is 7,434 using the ratio method, including the WAVA, U-3 and Shoreline students. Enrollment without these students included is projected to be 6,168. The 2035 projected enrollment and its effect on capacity is reflected in Table 11.

**Table 11-Unhoused Students 2035  
(w/o classroom additions)  
(Full Time Equivalent (FTE))**

<b>Grade Span</b>	<b>2013 Enrollment</b>	<b>2035 Projected Enrollment</b>	<b>Student Capacity In 2013</b>	<b>Surplus/ Deficiency 2035</b>
Elementary K-5	2,437	3,052	2,963	-89
Middle 6-8	1,391	1,579	1,629	50
High School 9-12	1,506	1,536	2,166	630
<b>Total</b>	<b>5,334</b>	<b>6,168</b>	<b>6,758</b>	<b>590</b>

Note: (-) indicates unhoused students (excludes WAVA, U3 and drop-out retrieval enrollment)

**CHAPTER 7 -- PLANNED IMPROVEMENTS & NEW CONSTRUCTION**

**NEW SCHOOL CONSTRUCTION**

Growth-related new school construction projects are summarized in Table 12. The primary source of funding for these projects would be from a bond issue to be placed before the electorate and supplemented by state matching funds and mitigation fees.

**Table 12 – Planned Construction Projects (Figures in Millions of Dollars)**

	2014	2015	2016	2017	2018	2019	Cost	Fees*	Bond	Match
<b>Improvements Adding Student Capacity</b>										
<b>Elementary</b>										
Salem Woods					\$10.00		\$10.00		\$10.00	
Frank Wagner				\$15.00			\$15.00	\$0.47	\$14.53	
<b>Capacity Addition</b>				<b>250</b>	<b>100</b>		<b>350</b>		<b>350</b>	
<b>Middle</b>										
Site Acquisition				\$3.00			\$3.00		\$3.00	
Hidden River				\$12.70			\$12.70	\$0.03	\$12.67	
<b>Capacity Addition</b>				<b>1,100</b>			<b>1,100</b>		<b>1,100</b>	
<b>High School</b>										
MHS PE/Athletics (5 teaching stations)			\$3.50				\$3.50		\$3.50	
<b>Totals -- Capacity Related</b>			\$3.50	\$30.70	\$10.00		\$44.70	\$0.50	\$43.70	
<b>Capacity Addition</b>			<b>140</b>	<b>1,350</b>	<b>100</b>					
<b>Improvements Not Adding Student Capacity</b>										
<b>Elementary</b>										
Salem Woods					\$16.70		\$16.70		\$16.70	
<b>Middle</b>										
Park Place Modernization			\$59.90				\$59.90		\$39.90	\$20.00
<b>District-wide Improvements</b>										
District Offices						\$9.82	\$9.82		\$9.82	
Small Capital Projects			\$1.70	\$1.80	\$1.70	\$1.80	\$7.00		\$7.00	
<b>Totals -- Non-Capacity</b>			\$61.60	\$1.80	\$18.40	\$11.62	\$93.42		\$73.42	\$20.00
<b>Elementary</b>				\$15.00	\$26.70		\$41.70	\$0.47	\$41.70	
<b>Middle</b>			\$59.90	\$15.70			\$75.60	\$0.03	\$55.60	\$20.00
<b>High School</b>			\$3.50				\$3.50		\$3.50	
<b>District Wide</b>			\$1.70	\$1.80	\$1.70	\$11.62	\$16.82		\$16.82	
<b>Annual Total</b>			\$65.10	\$32.50	\$28.40	\$11.62	\$137.62	\$0.50	\$117.62	\$20.00

\* "Fees" included monies left from previous collections.

### Elementary Level Projects

A classroom and associated spaces addition will be done at Salem Woods Elementary, and will house 100 to 110 students. The school would also undergo a remodel of existing spaces to bring it up to current building code and educational standards.

Frank Wagner elementary would have a large addition of library spaces and 8 – 10 classrooms to house students that are in temporary housing in portables and in an adjoining school.

### Middle School Level Projects

Hidden River Middle would have the Phase 3 Addition added to the building, providing housing for an additional 250 students. This planned addition will consist of classrooms as well as laboratories, computer centers, art rooms and shop classrooms. The kitchen will be expanded to serve the additional student load.

Park Place Middle school is scheduled to undergo a complete renovation plus some demolition and replacement of older buildings to bring it up to meet current building codes and educational standards.

### High School Level Projects

The Monroe High school would have 5 teaching stations added by converting unusable outdoor physical education space to useable all weather spaces.

### District Level Projects

Seven million dollars is allocated for small capital projects from the District's current Small Capital Projects List to be done at all sites. These improvements would involve reroofing, HVAC replacement, etc.

The District Office building is nearly 100 years old and needs remodel or replacement. The project has not been finalized but a preliminary budget of \$9.82 million is allocated to this work.

### Relocatable (Portable) Classrooms

The District will attempt to minimize the purchase of re locatable classrooms; however moveable classrooms will always be needed to handle upswings in student enrollment. Issues with moveable classrooms have been discussed in Chapter 5 of this document. Mitigation fee revenue, when available, will be used to purchase or relocate this type of classroom.

### Site Acquisition

The Monroe School District would continue to need school sites through 2035. The District currently has one elementary site unused north of Highway 2 that was purchased in 2007. A third middle school site is needed, also north of highway 2. Three million dollars is budgeted for site(s) acquisition. The unused acreage at Chain Lake Elementary is limited by wetlands and required setbacks. It would only be suitable for an elementary expansion in the future.

Support Facility Needs

The District's Transportation site and buildings are severely impacted by the expanding bus fleet and need additional space.

Facilities, Maintenance and Grounds departments are housed in a volunteer-built building from sometime in the 1950's. At some point they will need to move to adequate buildings that are designed to be used to support the functions of these departments.

Warehouse space is part of the District Office complex and is also too small for its current functions.

Table 13 shows how the planned improvements affect school capacity based on the projected enrollment.

**Table 13 – Future Capacity and Future Enrollment**

	<b>Elementary</b>	<b>Middle</b>	<b>High School</b>
<b>2013</b>			
Existing Capacity	2,963	1,629	2,166
Programmed Improvement Capacity	0	0	0
Capacity After Improvement	2,963	1,629	2,166
Current Enrollment	2,437	1,391	1,506
Surplus (Deficit) After Improvement	526	238	660
<b>2014</b>			
Existing Capacity	2,963	1,629	2,166
Programmed Improvement Capacity	0	0	0
Capacity After Improvement	2,963	1,629	2,166
Projected Enrollment	2,496	1,365	1,441
Surplus (Deficit) After Improvement	467	264	725
<b>2015</b>			
Existing Capacity	2,963	1,629	1,526
Programmed Improvement Capacity	0	0	0
Capacity After Improvement	2,963	1,629	1,526
Projected Enrollment	2,623	1,390	1,297
Surplus (Deficit) After Improvement	340	239	229
<b>2016</b>			
Existing Capacity	2,963	1,629	1,526
Programmed Improvement Capacity	0	0	140
Capacity After Improvement	2,963	1,629	1,666
Projected Enrollment	2,629	1,393	1,279
Surplus (Deficit) After Improvement	334	236	387

	<b>Elementary</b>	<b>Middle</b>	<b>High School</b>
<b>2017</b>			
Existing Capacity	2,963	1,629	1,666
Programmed Improvement Capacity	250	1,100	0
Capacity After Improvement	3,213	2,729	1,666
Projected Enrollment	2,654	1,304	1,336
Surplus (Deficit) After Improvement*	559	1,425	330
<b>2018</b>			
Existing Capacity	3,213	2,729	1,666
Programmed Improvement Capacity	100	0	0
Capacity After Improvement	3,313	2,729	1,666
Projected Enrollment	2,748	1,319	1,220
Surplus (Deficit) After Improvement*	565	1,410	446
<b>2019</b>			
Existing Capacity	3,313	2,729	1,666
Programmed Improvement Capacity	0	0	0
Capacity After Improvement	3,313	2,729	1,666
Projected Enrollment	2,772	1,318	1,167
Surplus (Deficit) After Improvement	541	1,411	499

## CHAPTER 8 -- CAPITAL FACILITIES FINANCING PLAN

Table 12 lists proposed funding sources for the capital facilities plan. 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 Park Place Middle School (former Monroe High School), new roofs and insulation at three schools, a play shed at Maltby Elementary, and other smaller projects. A bond was passed in 1996 for \$24 million. It was used for the construction of a new high school and Hidden River Middle School in the Maltby area, both of which opened in September 1999. It also funded several other projects. The District passed a successful bond issue in 2003 in the amount of \$21,852,000. These funds were used for the construction of Fryelands Elementary, additions to Hidden River Middle School and Monroe High School, remodeling of Maltby Elementary School, new athletic facilities and technology upgrades. The projects were completed in 2005/2006.

A study and survey of the District's facility needs was completed in 2007 by the architectural firm of Hutteball & Oremus. Based on the findings of the study and survey and the recommendations of the Capital Facility Steering Committee, the District placed before the electorate a bond issue in April 2010. The bond failed. The District is considering placement of a bond issue on the ballot in 2014 for the modernization of Park Place Middle School and multiple other projects (See Table 12)

### 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. 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.<sup>3</sup>

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). 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 Monroe School District is not eligible to collect impact fees during this biennium because all grade levels have sufficient classroom capacity through 2019.

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<sup>3</sup> Paying for Growth's Impacts - A Guide To Impact Fees, State of Washington Department of Community Development Growth Management Division, January, 1992, Pg. 30.

**CHAPTER 9 -- IMPACT FEES**

**SCHOOL IMPACT FEES IN SNOHOMISH COUNTY**

The Growth Management Act authorizes jurisdictions to collect impact fees to supplement funding of additional public facilities needed to accommodate new development. Impacts to schools resulting from new residential development have been mitigated through Snohomish County's school mitigation ordinance, Title 30.66C (formerly Title 26C SCC).

Title 26C SCC became effective May 1, 1991 and authorized collection of impact mitigation from residential developments in unincorporated Snohomish County. Title 26C SCC was most recently amended by the Snohomish Council on November 17, 1997 to place the program under the authorization of the GMA. It stipulated school impact mitigation fees must be related to a school district's expansion costs identified in a capital facilities plan. These costs are a local obligation and are reasonably related to a proposed residential subdivision or development. In 2003, Snohomish County re-structured its development codes under a single "Unified Development Code" which placed the school impact fee program under Title 30.66C SCC. School Districts may use impact fees for improvements to District wide student housing. Impact fees identified in the Capital Facilities Plan approved by the School Board and Snohomish County, under Title 30.66C, for the Monroe School District are summarized in Table 14.

Impact fees cannot be used for the operation, maintenance, repair, alteration, or replacement of existing capital facilities used to meet "existing facility deficiencies".<sup>1</sup> Because no growth-related classroom deficits will occur during the 2013-2019 planning period, no impact fees will be collected by the Monroe School District.

**Table 14 – Monroe School District –  
Impact Fees Authorized Under Snohomish County Title 30.66C  
1995-2016**

Housing Type	1995	1996	1997	1998	1999	2000	2001-2002	2003-2004
Single-Family Detached	*	*	*	*	\$2,580.00	\$4,215.00	\$4,215.00	\$4,894.00
One-Bedroom Apartment	*	*	*	*	\$309.00	\$441.00	\$441.00	\$409.00
Two + Bedroom Apartment	*	*	*	*	\$1,954.00	\$4,173.00	\$4,173.00	\$6,606.00

Housing Type	2005-2006	2007-2008	2009-2010	2011-2012	2013-2014	2015-2016
Single-Family Detached	\$5,863	\$5,581	\$4,708	\$3,681	\$1,984	*
One-Bedroom Apartment	\$26	\$0	\$0	*	*	*
Two + Bedroom Apartment	\$5,241	\$3,637	\$2,075	\$996	3,174	*
Duplex/Townhouse Units	\$5,241	\$3,637	\$2,075	\$996	3,174	*



**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, 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 and presented on Table 15.

**Table 15: Impact Fee Variables**

<b>Criteria</b>	<b>Elementary</b>	<b>Middle</b>	<b>High</b>
<i>Student Factor</i>			
Single Family	0.299	0.158	0.181
Multiple Family 1 Bdrm	0.178	0.110	0.178
Multiple Family 2 Bdrm	0.178	0.110	0.178
<i>Site Acquisition Cost Element</i>			
Site Needs (acres)		50	
<i>Growth Related</i>			
Cost Per Acre	\$58,000	\$58,000	\$58,000
Additional Capacity to be Built		850	
<i>Growth Related</i>			
<i>School Construction Cost Element</i>			
Estimated Facility Construction Cost	\$25,000,000	\$12,700,000	\$3,500,000
<i>Growth Related</i>			
Additional Capacity	350	1,100	140
<i>Growth Related</i>			
Current Facility Square Footage	283,365	193,549	250,881
Current Facility Capacity	2,924	1,629	2,166
SPI Rated Capacity	2,924	1,736	1,964
<i>Relocatable Facilities Cost Element</i>			
Existing Units	17	13	6
<i>New Facilities Required Through 2019</i>			
Cost Per Unit	\$125,000	\$125,000	\$125,000
<i>Relocatable Facilities Cost</i>			
<i>Growth Related</i>			
Relocatable Facilities Capacity/Unit	25	28	28

Criteria	Elementary	Middle	High
<b>Total Relocatable Facilities Capacity</b>	<b>Portables are not considered in capacity</b>		
-- Permanent Capacity Percentage			
-- Permanent Capacity			
Existing Portable Square Footage			
<i>State Match Credit</i>			
Boeckh Index	\$200.40	\$200.40	\$200.40
School Space per Student (OSPI)	90	117	130
State Match Percentage	40.00%	40.00%	40.00%
<i>Tax Payment Credit</i>			
Interest Rate	4.38%	4.38%	4.38%
Loan Payoff (Years)	10	10	10
Property Tax Levy Rate	0.00158	0.00158	0.00158
Average AV per DU Type	\$278,028	\$94,676	\$64,444
<i>Growth-Related Capacity Percentage</i>	(SF)	(MF 1 bdrm)	(MF 2 bdrm)
	0%	0%	0%
<i>Discount</i>			50%
<i>Discount</i>			25%

### 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 two or more bedrooms.

Pursuant to a requirement of Snohomish County Ordinance 97-095, each school district is required to conduct student generation studies within their jurisdictions. This is done to "localize" generation rates for purposes of calculating impact fees. A description of this methodology is contained in Appendix B.

### SITE ACQUISITION COST ELEMENT

Site Needs. The total need for new or expanded sites as shown on Table 12. Site size is 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 - 15 acres as optimal for construction of new elementary schools, 30-35 acres for new middle and junior high schools and 30 - 40 acres for new high schools. The 50 acre need for future a future middle school site recognizes the topographic, critical area and other challenges that may exist on sites north of US 2 where such a facility will be needed in the future.

Cost per Acre. The Monroe School District continually reviews potential facility sites as future sites will be needed to meet District needs through 2035 and beyond.

Land costs continue 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 \$40,000 to \$70,000 per acre. Also, in the future, the District may have to consider property condemnation in order to find adequate school sites.

For purposes of this CFP, the District will use the figure of \$58,000 per acre as the cost of the property which could be purchased as a usable school site. It is considered a conservative estimate.

Additional Capacity to be Built The added capacity is the amount of student capacity that will be added by land acquisition and construction projects planned for accommodating new student growth. "Growth related" capacity is based on facility deficiencies created *after* 2013. For the period 2014-16 there is a "zero" growth factor.

#### **SCHOOL CONSTRUCTION COST ELEMENT**

Facility 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. Estimated construction costs for 2013-2019 are shown on Table 12.

Additional 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 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 to 550 students, new middle schools for 800 to 850 students, and new high schools to accommodate 1,600 to 1800 students.

Facility Capacity SPI facility capacity is computed using OSPI allocations square feet per student. OSPI calculates school capacity by dividing gross square footage of a building by a standard square footage per student. Monroe currently uses the OSPI standard of 90 square feet per kindergarten through sixth grade student, 117 square feet per grade seven and grade eight student and 130 square feet per grade nine through grade twelve student.

#### **RELOCATABLE 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 \$125,000.

The capacity information is given for informational purposes. However for purposes of computing capacity and impact fees, portables are not considered as providing permanent capacity. They are temporary classrooms only.

## STATE MATCH CREDITS.

Match credits are applied to impact fee calculations to account for other funding sources.

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, it is currently estimated it would receive reimbursement on a matching ratio of 66.61%. However, the money eventually received by the District would not actually be 66.61% of the entire project cost. Historically, the District has received approximately 40% of the total project costs. This later number is used for this CFP.

Boeckh Index - means the number generated by the E. H. Boeckh Company and used by OSPI as a guideline for determining the area cost allowance for new school construction. It is used in Snohomish County capital facilities plans to help compute the cost figure against which the Match Percentage is applied.

## TAX PAYMENT CREDITS

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 rate of 4.38 percent is used for calculating the tax credit for Snohomish County school districts. The number is provided by the County.

Levy Rate. The current levy rate for the Monroe School District is \$1.58 per one-thousand dollars (\$1,000) 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 \$278,028, the average assessed value for multi-family units is \$64,444 for one bedroom units and \$94,676 for 2+ bedroom units and. The figures are provided by Snohomish County.

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 less than 10 years. The Snohomish County average of 10 years is used for impact calculations.

## OTHER DISTRICT CREDITS.

Growth Related Capacity Percentage: This is a required reduction in impact fees based on the amount of cost attributable to new growth i.e. growth in enrollments since 2013. The

figure for the 2014 CFP is zero. There is sufficient capacity through 2019 at all grade levels.

Discount: This is a discretionary discount applied by local jurisdictions or the District. Snohomish County applies a 50% reduction.

Table 18A presents the variables for 2014. Impact fee formulae are shown in Appendix C. The results are shown on Tables 21 and 22. No impact fees will be assessed under this 2014 CFP.

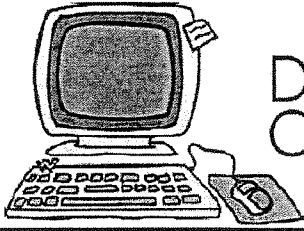
#### **PROPOSED MONROE SCHOOL DISTRICT IMPACT FEE SCHEDULE**

Using the variables and formula described, impact fees proposed for the Monroe School District are summarized in Tables 16 and 17. Refer to Appendix C for impact fee calculations.

**Table 16  
Monroe School District  
Proposed Impact Fee Schedule**

Housing Type	Impact Fee Per Unit
Single-Family Detached	\$0
Multi-Family (2+bedrooms)	\$0
Multi-Family (one bedroom)	\$0
Duplex/Townhouse Units	\$0

Appendix A  
Student Generation Rate Study



DOYLE  
CONSULTING

ENABLING SCHOOL DISTRICTS TO MANAGE AND USE STUDENT ASSESSMENT DATA

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# Student Generation Rate Study for the Monroe School District

3/4/2014

This document describes the methodology used to calculate student generation rates (SGRs) for the Monroe School District, and provides results of the calculations.

SGRs were calculated for two types of residential construction: Single family detached, and multi-family with 2 or more bedrooms. Attached condominiums, townhouses and duplexes are included in the multi-family classification since they are not considered “detached”. Manufactured homes on owned land are included in the single family classification.

1. Electronic records were obtained from the Snohomish County Assessor’s Office containing data on all new construction within the Monroe School District from January 2006 through December 2012. As compiled by the County Assessor’s Office, this data included the address, building size, assessed value, and year built for new single and multi-family construction. The data was “cleaned up” by eliminating records which did not contain sufficient information to generate a match with the District’s student record data (i.e. incomplete addresses).
2. The District downloaded student records data into Microsoft Excel format. This data included the addresses and grade levels of all K-12 students attending the Monroe School District as of February 2014. Before proceeding, this data was reformatted and abbreviations were modified as required to provide consistency with the County Assessor’s data.

232 Taylor Street • Port Townsend, WA 98368 • (360) 680-9014

3. Single Family Rates: The data on all new single family detached residential

units in County Assessor's data were compared with the District's student record data, and the number of students at each grade level living in those units was determined. The records of 747 single family detached units were compared with data on 6,697 students registered in the District, and the following matches were found by grade level(s)\*:

GRADE(S)	COUNT OF MATCHES	CALCULATED RATE
K	43	0.058
1	26	0.035
2	35	0.047
3	44	0.059
4	33	0.044
5	42	0.056
6	35	0.047
7	45	0.060
8	38	0.051
9	29	0.039
10	39	0.052
11	40	0.054
12	27	0.036
K-5	223	0.299
6-8	118	0.158
9-12	135	0.181
K-12	476	0.637

4. Large Multi-Family Developments: Snohomish County Assessor's data does not specifically indicate the number of units or bedrooms contained in large multi-family developments. Additional research was performed to obtain this information from specific parcel ID searches, and information provided by building management, when available. Information obtained included the number of 0-1 bedroom units, the number of 2+ bedroom units, and specific addresses of 0-1 bedroom units.
5. Small Multi-Family Developments: This method included all developments in the County Assessor's data containing four-plexes, tri-plexes, duplexes, condominiums and townhouses. This data contained information on the number of bedrooms for all townhouses and condominiums. Specific parcel ID searches were performed for duplex and larger units in cases where number of bedroom data was missing.



6. Multi-Family 2+ BR Rates: The multi-family 2+ BR SGR's were calculated by comparing data on 2+ BR multi-family units with the District's student record data, and the number of students at each grade level living in those units was determined. The records of 73 multi-family 2+ BR units were compared with data on 6,697 students registered in the District, and the following matches were found by grade level(s)\*:

GRADE(S)	COUNT OF MATCHES	CALCULATED RATE
K	2	0.027
1	0	0.000
2	3	0.041
3	1	0.014
4	3	0.041
5	4	0.055
6	4	0.055
7	3	0.041
8	1	0.014
9	4	0.055
10	4	0.055
11	3	0.041
12	2	0.027
K-5	13	0.178
6-8	8	0.110
9-12	13	0.178
K-12	34	0.466

7. Multi-Family 0-1 BR Rates: Research indicated that no (0) multi-family 0-1 BR units were constructed within District boundaries during the time period covered by this study.

8. Summary of Student Generation Rates\*:

	K-5	6-8	9-12	K-12
Single Family	.299	.158	.181	.637
Multi-Family 2+ BR	.178	.110	.178	.466

\*Calculated rates for grade level groups may not equal the sum of individual grade rates due to rounding.

Appendix B

Mitigation Revenue/Expenditure Report

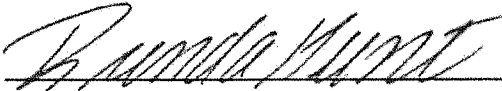




Report of School Mitigation Fees  
For Calendar Year 2013

	City	County	Total
Mitigation Balance 01/01/2013	\$ 459,693.46	\$ 12,270.80	\$ 471,964.26
Mitigation Received - Jan to Dec, 2013	\$ 128,078.00	\$ 86,530.00	\$ 214,608.00
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Expenditures			
Property taxes	\$ -	\$ (90.00)	\$ (90.00)
Portables	\$ (136,752.25)	\$ (71,914.96)	\$ (208,667.21)
	\$ (136,752.25)	\$ (72,004.96)	\$ (208,757.21)
Mitigation Balance 12/31/13	\$ 451,604.20	\$ 26,882.36	\$ 478,486.56

Report Prepared By:

  
Brenda S. Hunt  
Executive Director of Fiscal Services

Appendix C  
Impact Fee Calculation



IMPACT FEE WORKSHEET  
 MONROE SCHOOL DISTRICT  
 SINGLE-FAMILY RESIDENTIAL

SITE ACQUISITION COST

Acres needed	<u>0.00</u>	x		<u>\$58,000</u>	/	capacity (# students)	<u>          </u>	x	student factor	<u>0.299</u>	=	<u>\$0</u>	(elementary)
Acres needed	<u>50.00</u>	x	cost/acre	<u>\$58,000</u>	/	capacity (# students)	<u>850</u>	x	student factor	<u>0.158</u>	=	<u>\$0</u>	(middle school)
Acres needed	<u>0.00</u>	x		<u>\$58,000</u>	/	capacity (# students)	<u>0</u>	x	student factor	<u>0.181</u>	=	<u>\$0</u>	(high school)
TOTAL SITE ACQUISITION COST												=	<u>\$0</u>

SCHOOL CONSTRUCTION COST

total const. cost	<u>\$25,000,000</u>	/		capacity (# students)	<u>0</u>	x	student factor	<u>0.299</u>	=	<u>\$0</u>	(elementary)		
total const. cost	<u>\$12,700,000</u>	/		capacity (# students)	<u>850</u>	x	student factor	<u>0.158</u>	=	<u>\$0</u>	(middle school)		
total const. cost	<u>\$3,500,000</u>	/		capacity (# students)	<u>0</u>	x	student factor	<u>0.181</u>	=	<u>\$0</u>	(high school)		
										Subtotal	<u>\$0</u>		
Total Square Feet		/	Total Square Feet										
of Permanent Space (District)	<u>694,537</u>		of School Facilities (000)	<u>727,795</u>					=	<u>95.43%</u>			
TOTAL FACILITY CONSTRUCTION COST												=	<u>\$0</u>

RELOCATABLE FACILITIES COST  
 (PORTABLES)

Portable Cost	<u>\$125,000</u>	/	<u>25</u>	facility size	x	student factor	<u>0.299</u>	=	<u>\$0</u>	(elementary)			
Portable Cost	<u>\$125,000</u>	/	<u>28</u>	facility size	x	student factor	<u>0.158</u>	=	<u>\$0</u>	(middle school)			
Portable Cost	<u>\$125,000</u>	/	<u>28</u>	facility size	x	student factor	<u>0.181</u>	=	<u>\$0</u>	(high school)			
										Subtotal	<u>\$0</u>		
Total Square Feet		/	Total Square Feet										
of Portable Space (District)	<u>33,258</u>		of School Facilities (000)	<u>727,795</u>					=	<u>4.57%</u>			
TOTAL RELOCATABLE COST ELEMENT												=	<u>\$0.00</u>

CREDIT AGAINST COST CALCULATION -- MANDATORY

STATE MATCH CREDIT

BOECKH Index	<u>\$200.40</u>	x OSPI Allowance	<u>90</u>	x	State Match %	<u>40.00%</u>	x	student factor	<u>0.299</u>	=	<u>\$0</u>	(elementary)
BOECKH Index	<u>\$200.40</u>	x OSPI Allowance	<u>117</u>	x	State Match %	<u>40.00%</u>	x	student factor	<u>0.158</u>	=	<u>\$0</u>	(middle school)
BOECKH Index	<u>\$200.40</u>	x OSPI Allowance	<u>130</u>	x	State Match %	<u>40.00%</u>	x	student factor	<u>0.181</u>	=	<u>\$0</u>	(high school)
TOTAL STATE MATCH CREDIT											=	<u>\$0</u>

TAX PAYMENT CREDIT

[(1+ interest rate	<u>4.38%</u>	) ^	<u>10</u>	years to pay off bond) - 1] /	[ interest rate	<u>4.38%</u>	x		
(1 + interest rate	<u>4.38%</u>	) ^	<u>10</u>	years to pay off bond ] x	<u>0.00158</u>	capital levy rate x			
assessed value	<u>\$278,028</u>						=	<u>\$0</u>	(tax payment credit)

IMPACT FEE CALCULATION

SITE ACQUISITION COST	<u>\$0</u>
FACILITY CONSTRUCTION COST	<u>\$0</u>
RELOCATABLE FACILITIES COST (PORTABLES)	<u>\$0</u>
(LESS STATE MATCH CREDIT)	<u>\$0</u>
(LESS TAX PAYMENT CREDIT)	<u>\$0</u>
(LESS COUNTY DISCOUNT)	<u>\$0.00</u>
(LESS ELECTIVE DISTRICT DISCOUNT)	<u>          </u>

FINAL IMPACT FEE PER UNIT	<u>\$0</u>
---------------------------	------------

IMPACT FEE WORKSHEET  
 MONROE SCHOOL DISTRICT  
**MULTIPLE FAMILY RESIDENTIAL -- 1 BDRM OR LESS**  
 SITE ACQUISITION COST

acres needed	<u>0.00</u>	x	growth related	<u>\$58,000</u>	/	capacity (# students)	<u>0</u>	x	student factor	<u>0.178</u>	=	<u>0%</u>	(elementary)
acres needed	<u>50.00</u>	x	cost per acre	<u>\$58,000</u>	/	capacity (# students)	<u>850</u>	x	student factor	<u>0.110</u>	=	<u>\$0</u>	(middle school)
acres needed	<u>0.00</u>	x	acre	<u>\$58,000</u>	/	capacity (# students)	<u>0</u>	x	student factor	<u>0.178</u>	=	<u>\$0</u>	(high school)
TOTAL SITE ACQUISITION COST											=	<u>\$0</u>	

SCHOOL CONSTRUCTION COST

total const. cost	<u>\$25,000,000</u>	/	capacity (# students)	<u>          </u>	x	student factor	<u>0.178</u>	=	<u>\$0</u>	(elementary)			
total const. cost	<u>\$12,700,000</u>	/	capacity (# students)	<u>          </u>	x	student factor	<u>0.110</u>	=	<u>\$0</u>	(middle school)			
total const. cost	<u>\$0</u>	/	capacity (# students)	<u>0</u>	x	student factor	<u>0.178</u>	=	<u>\$0</u>	(high school)			
										Subtotal	<u>\$0</u>		
Total Square Feet of Permanent Space (District)	<u>694,537</u>	/	Total Square Feet of School Facilities	<u>727,795</u>				=	<u>95.43%</u>				
TOTAL FACILITY CONSTRUCTION COST											=	<u>\$0</u>	

RELOCATABLE FACILITIES COST (PORTABLES)

Portable Cost	<u>\$125,000</u>	/	<u>25</u>	facility size	x	student factor	<u>0</u>	=	<u>\$0</u>	(elementary)			
Portable Cost	<u>\$125,000</u>	/	<u>28</u>	facility size	x	student factor	<u>0.11</u>	=	<u>\$0</u>	(middle school)			
Portable Cost	<u>\$125,000</u>	/	<u>28</u>	facility size	x	student factor	<u>0.178</u>	=	<u>\$0</u>	(high school)			
										Subtotal	<u>\$0</u>		
Total Square Feet of Portable Space (District)	<u>33,258</u>	/	Total Square Feet of School Facilities	<u>727,795</u>				=	<u>4.57%</u>				
TOTAL RELOCATABLE COST ELEMENT											=	<u>\$0</u>	

CREDIT AGAINST COST CALCULATION -- MANDATORY

STATE MATCH CREDIT

BOECKH Index	<u>\$200.40</u>	x OSPI Allowance	<u>90</u>	x	State Match %	<u>40.00%</u>	x	student factor	<u>0.178</u>	=	<u>\$0</u>	(elementary)
BOECKH Index	<u>\$200.40</u>	x OSPI Allowance	<u>117</u>	x	State Match %	<u>40.00%</u>	x	student factor	<u>0.110</u>	=	<u>\$0</u>	(middle school)
BOECKH Index	<u>\$200.40</u>	x OSPI Allowance	<u>130</u>	x	State Match %	<u>40.00%</u>	x	student factor	<u>0.178</u>	=	<u>\$0</u>	(high school)
<i>TOTAL STATE MATCH CREDIT</i>											=	<u>\$0</u>

TAX PAYMENT CREDIT

$$\frac{[(1 + \text{interest rate } 4.38\%)^{10} \text{ years to pay off bond} - 1]}{(1 + \text{interest rate } 4.38\%)^{10} \text{ years to pay off bond}} \times \text{assessed value } \$64,444 = \frac{[ \text{interest rate } 4.38\% \times 0.00158 \text{ levy rate} ]}{1} \times \text{assessed value} = \$0 \text{ (tax payment credit)}$$

IMPACT FEE CALCULATION

SITE ACQUISITION COST	<u>\$0</u>
FACILITY CONSTRUCTION COST	<u>\$0</u>
RELOCATABLE FACILITIES COST (PORTABLES)	<u>\$0</u>
(LESS STATE MATCH CREDIT)	<u>\$0</u>
(LESS TAX PAYMENT CREDIT)	<u>\$0</u>
(LESS COUNTY DISCOUNT)	<u>\$0</u>
(LESS ELECTIVE DISTRICT DISCOUNT)	<u>\$0</u>

FINAL IMPACT FEE PER UNIT	<u>\$0.00</u>
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IMPACT FEE WORKSHEET  
 MONROE SCHOOL DISTRICT  
 MULTIPLE FAMILY RESIDENTIAL -- 2 BDRM OR MORE

SITE ACQUISITION COST

acres needed	<u>0.00</u>	x	cost/acre	<u>\$58,000</u>	/	capacity (# students)	<u>0</u>	x	student factor	<u>0.178</u>	=	<u>\$0</u>	(elementary)
acres needed	<u>50.00</u>	x	cost/acre	<u>\$58,000</u>	/	capacity (# students)	<u>0</u>	x	student factor	<u>0.11</u>	=	<u>\$0</u>	(middle school)
acres needed	<u>0.00</u>	x	cost/acre	<u>\$58,000</u>	/	capacity (# students)	<u>0</u>	x	student factor	<u>0.178</u>	=	<u>\$0</u>	(high school)
TOTAL SITE ACQUISITION COST											=	<u>\$0</u>	

SCHOOL CONSTRUCTION COST

total const. cost	<u>\$25,000,000</u>	/	capacity (# students)	<u>350</u>	x	student factor	<u>0.178</u>	=	<u>\$0</u>	(elementary)	
total const. cost	<u>\$12,700,000</u>	/	capacity (# students)	<u>1100</u>	x	student factor	<u>0.11</u>	=	<u>\$0</u>	(middle school)	
total const. cost	<u>\$3,500,000</u>	/	capacity (# students)	<u>140</u>	x	student factor	<u>0.178</u>	=	<u>\$0</u>	(high school)	
									Subtotal	<u>\$0</u>	

Total Square Feet of Permanent Space (District)	<u>694,537</u>	/ Total Square Feet of School Facilities	<u>727,795</u>	=	<u>95.43%</u>
--	----------------	---	----------------	---	---------------

TOTAL FACILITY CONSTRUCTION COST = \$0

RELOCATABLE FACILITIES COST (PORTABLES)

Portable Cost	<u>\$125,000</u>	/	<u>25</u>	facility size	x	student factor	<u>0.178</u>	=	<u>\$0</u>	(elementary)
Portable Cost	<u>\$125,000</u>	/	<u>28</u>	facility size	x	student factor	<u>0.11</u>	=	<u>\$0</u>	(middle school)
Portable Cost	<u>\$125,000</u>	/	<u>28</u>	facility size	x	student factor	<u>0.178</u>	=	<u>\$0</u>	(high school)
									Subtotal	<u>\$0</u>

Total Square Feet of Portable Space (District)	<u>33,258</u>	/ Total Square Feet of School Facilities	<u>727,795</u>	=	<u>4.57%</u>
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TOTAL RELOCATABLE FACILITY COST = \$0

CREDIT AGAINST COST CALCULATION -- MANDATORY

STATE MATCH CREDIT

BOECKH Index	<u>\$200.40</u>	x OSPI Allowance	<u>90</u>	x	State Match %	<u>40.00%</u>	x	student factor	<u>0.178</u>	=	<u>\$0</u>	(elementary)
BOECKH Index	<u>\$200.40</u>	x OSPI Allowance	<u>117</u>	x	State Match %	<u>40.00%</u>	x	student factor	<u>0.11</u>	=	<u>\$0</u>	(middle school)
BOECKH Index	<u>\$200.40</u>	x OSPI Allowance	<u>130</u>	x	State Match %	<u>40.00%</u>	x	student factor	<u>0.178</u>	=	<u>\$0</u>	(high school)
TOTAL STATE MATCH CREDIT										=	<u>\$0</u>	

TAX PAYMENT CREDIT

$$\frac{[(1 + \text{interest rate } 4.38\%)^{10} \text{ years to pay off bond}] - 1}{(1 + \text{interest rate } 4.38\%)^{10} \text{ years to pay off bond}] \times \text{assessed value } \$94,676} {[\text{interest rate } 4.38\% \times 0.00158 \text{ levy rate}] \times} = \underline{\$1,132} \text{ (tax payment credit)}$$

IMPACT FEE CALCULATION

SITE ACQUISITION COST	<u>\$0</u>	
FACILITY CONSTRUCTION COST	<u>\$0</u>	
RELOCATABLE FACILITIES COST (PORTABLES)	<u>\$0</u>	
(LESS STATE MATCH CREDIT)	<u>\$0</u>	
(LESS TAX PAYMENT CREDIT)	<u>(\$1,132)</u>	
(LESS COUNTY DISCOUNT)	<u>\$566</u>	
(LESS ELECTIVE DISTRICT DISCOUNT)	<u>\$283</u>	(\$566)

FINAL IMPACT FEE PER UNIT \$0

Appendix D

Board Resolution Adopting

Capital Facilities Plan

Appendix E

Determination of Non-Significance and Environmental Checklist

Appendix F

Snohomish County General Policy Plan

## APPENDIX F

### REVIEW CRITERIA FOR SCHOOL DISTRICT CAPITAL FACILITY PLANS

#### Required Plan Contents

1. Future Enrollment Forecasts by Grade Span, including:
  - a 6-year forecast (or more) to support the financing program;
  - a description of the forecasting methodology and justification for its consistency with OFM population forecasts used in the county's comprehensive plan.
2. Inventory of Existing Facilities, including:
  - the location and capacity of existing schools;
  - a description of educational standards and a clearly defined minimum level of service such as classroom size, school size, use of portables, etc.;
  - the location and description of all district-owned or leased sites (if any) and properties;
  - a description of support facilities, such as administrative centers, transportation and maintenance yards and facilities, etc.; and
  - information on portables, including numbers, locations, remaining useful life (as appropriate to educational standards), etc.
3. Forecast of Future Facility Needs, including:
  - identification of new schools and/or school additions needed to address existing deficiencies and to meet demands of projected growth over the next 6 years; and
  - the number of additional portable classrooms needed.
4. Forecast of Future Site Needs, including:
  - the number, size, and general location of needed new school sites.
5. Financing Program (6-year minimum Planning Horizon)
  - estimated cost of specific construction and site acquisition and development projects proposed to address growth-related needs;
  - projected schedule for completion of these projects; and
  - proposed sources of funding, including impact fees (if proposed), local bond issues (both approved and proposed), and state matching funds.
6. Impact Fee Support Data (where applicable), including:
  - an explanation of the calculation methodology, including description of key variables and their computation;
  - definitions and sources of data for all inputs into the fee calculation, indicating that it:
    - a) is accurate and reliable and that any sample data is statistically valid;
    - b) accurately reflects projected costs in the 6-year financing program; and
  - a proposed fee schedule that reflects expected student generation rates from, at minimum, the following residential unit types: single-family, multi-family/studio or 1-bedroom, and multi-family/2-bedroom or more.

### **Plan Performance Criteria**

1. School facility plans must meet the basic requirements set down in RCW 36.70A (the Growth Management Act). Districts proposing to use impact fees as a part of their financing program must also meet the requirements of RCW 82.02.
2. Where proposed, impact fees must utilize a calculation methodology that meets the conditions and tests of RCW 82.02.
3. Enrollment forecasts should utilize established methods and should produce results which are not inconsistent with the OFM population forecasts used in the county comprehensive plan. Each plan should also demonstrate that it is consistent with the 20-year forecast in the land use element of the county's comprehensive plan.
4. The financing plan should separate projects and portions of projects which add capacity from those which do not, since the latter are generally not appropriate for impact fee funding. The financing plan and/or the impact fee calculation formula must also differentiate between projects or portions of projects which address existing deficiencies (ineligible for impact fees) and those which address future growth-related needs.
5. Plans should use best-available information from recognized sources, such as the U.S. Census or the Puget Sound Regional Council. District-generated data may be used if it is derived through statistically reliable methodologies.
6. Districts which propose the use of impact fees should identify in future plan updates alternative funding sources in the event that impact fees are not available due to action by the state, county or the cities within their district boundaries.
7. Repealed effective January 2, 2000.

### **Plan Review Procedures**

1. District capital facility plan updates should be submitted to the County Planning and Development Services Department for review prior to formal adoption by the school district.
2. Each school district planning to expand its school capacity must submit to the county an updated capital facilities plan at least every 2 years. Proposed increases in impact fees must be submitted as part of an update to the capital facilities plan, and will be considered no more frequently than once a year.
3. Each school district will be responsible for conducting any required SEPA reviews on its capital facilities plan prior to its adoption, in accordance with state statutes and regulations.

4. School district capital facility plans and plan updates must be submitted no later than 60 calendar days prior to their desired effective date. (For example, if a district requires its updated plan to take effect on January 1, 2007 in order to meet the minimum updating requirement of item 2. above, it must formally submit that plan no later than October 30, 2006.)
5. District plans and plan updates must include a resolution or motion from the district school board adopting the plan before it will become effective.





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For Calendar Year 2013

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	\$ (136,752.25)	\$ (72,004.96)	\$ (208,757.21)
Mitigation Balance 12/31/13	\$ 451,604.20	\$ 26,882.36	\$ 478,486.56

Report Prepared By:

Brenda S. Hunt  
Executive Director of Fiscal Services



**Mukilteo**  
School District

**MUKILTEO SCHOOL DISTRICT NO. 6**

**CAPITAL FACILITIES PLAN  
2014 – 2019**

DRAFT 6/09/14

Adopted:  
Prepared:

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# MUKILTEO SCHOOL DISTRICT NO. 6

## CAPITAL FACILITIES PLAN 2014 – 2019

### BOARD OF DIRECTORS

Michael Simmons

Judy Schwab

Ron Johnson

Jeff Thorp

John Gahagan

### SUPERINTENDENT

Marci L. Larsen, Ed.D.

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# I. INTRODUCTION

## Purpose of the Capital Facilities Plan

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The Washington State Growth Management Act (the “GMA”) outlines 13 broad goals including the 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 growth. The CFP includes a detailed schedule and financing program for accommodating projected student enrollment at acceptable service levels over the next six years (2014 – 2019).

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 identifies sources of public money for such purposes. The financing plan separates projects and portions of projects that 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**

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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.

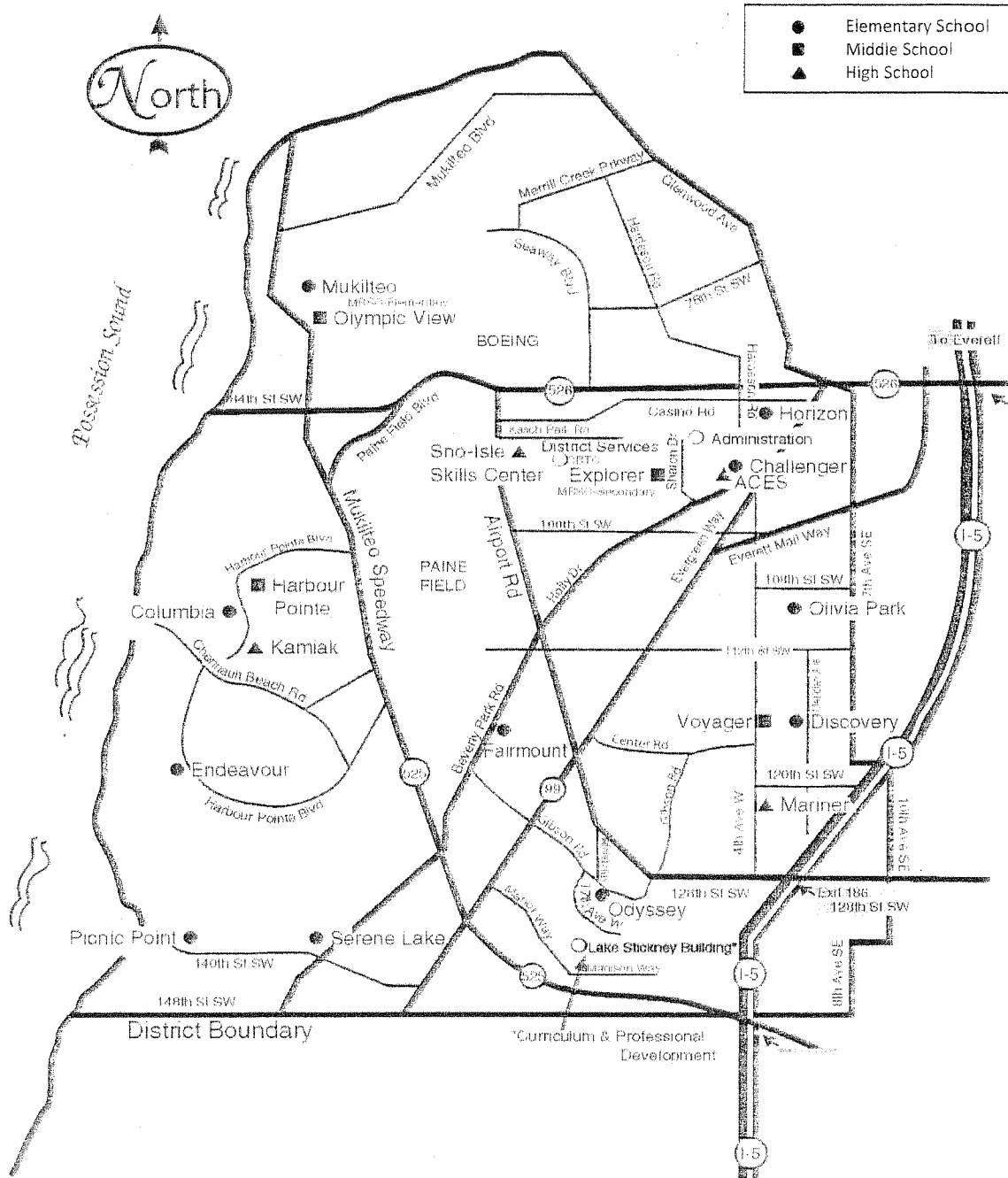
The District serves a student population headcount of 14884 (October 2013) with eleven elementary schools (grades K-5), four middle schools (grades 6-8), two comprehensive high schools (grades 9-12), and one alternative high school (grades 9-12). For the purposes of facility planning, this CFP considers 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 currently exist at elementary and high schools. Middle schools show deficiencies beginning in school year 2014.
- Uneven growth rates exist between geographic sectors within the District. Such uneven growth patterns results in some schools reaching maximum capacity sooner than others and this will increase the difficulty of maintaining stable school boundaries. The District will need to continue to transfer students from high population centers to schools with capacity until new facilities are built to absorb growth.

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 that 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

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

Advanced Placement (high school)	Library/Media Centers
Special Education (resource or specialized)	Speech Language Pathologists
Special Education (early childhood education)	Office/Therapy Room
Summer School	Performing Arts
Gifted & Talented Program including Summit (grades 3-8)	Health & Fitness
English as a Second Language (ESL)	Science Labs (earth, life, physical)
Elementary ELL Sheltering classes	OT/PT
World Languages	Career Centers (High School)
Community-Based Transition Program	Student Stores (High School)
ECEAP	Learning Assistance Programs
Music Programs	Mukilteo Behavioral Support Center
Computer & Technology Labs	Career and Technical Labs
	All-day Kindergarten

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 that directly affect school capacity are outlined below for the elementary, middle and high school grade levels.

***Educational Program Planning Standards for Elementary Schools***

- Planning class size for Kindergarten is 24 students per classroom.
- Class size for Kindergarten cannot exceed 29 students.
- Planning class size for grades 1-5 is 24 students per classroom.
- Class size for grades 1-5 cannot exceed 30 students.
- Schools should not exceed 700 headcount students. If schools exceed 700 headcount students, common areas may need to be enlarged or supplemented.
- Special Education for some students is provided in a self-contained classroom.
- Music and physical education instruction will be provided in a separate classroom.
- Schools have a room dedicated as a computer lab.
- All schools have at least two rooms dedicated as Resource and ELL. Title I schools have an additional dedicated room. More space may be designated in high enrollment schools.

***Educational Program Standards for Middle and High Schools***

- Planning class size for middle school grades is 25 students per teacher.
- Class size for middle school grades 6-8 cannot exceed 30 students.
- Planning class size for high school grades is 27 students per teacher.
- Class size for high school grades 9-12 cannot exceed 33 students.
- The ACES program limits capacity to 200 students.
- 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 85.
- Identified students will also be provided other programs in classrooms designated as computer labs, resource rooms and other program specific classrooms (i.e., music, drama, art, family and consumer science, special education, career and technical education and English language learner).

***Minimum Level of Service***

Planning class sizes are used to determine school capacities, they are not a measure of the District's minimum level of service. The minimum level of service is defined as the maximum level of enrollment the District can accommodate at any given time. At current program offerings and within existing permanent and portable facilities, the District's minimum level of service is:

Grade Level	Students/Classroom	Minimum Level of Service in FTE	Current Level of Service in FTE
K-5	30	8,562	6523
6-8	33	4,996	3392
9-12	33	5,645	4295

### 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 on page 3.

#### Schools

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The District maintains eleven elementary schools, four middle schools, two comprehensive high schools, an alternative high school, and the Sno-Isle Skills Center. 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.<sup>1</sup> 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)

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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 94 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 at the elementary level and are calculated at 85% occupancy at the middle and high schools. Current use of relocatable classrooms throughout the District is summarized in Table 4.

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<sup>1</sup>Undersized classrooms and classrooms used for support activities do not increase capacity. Special education class rooms are counted at 12 students for elementary schools and 16 students for middle and high schools.

**Table 1 - Elementary School Permanent Classroom Inventory**

Elementary School	Site Size (Acres)	Building Area (Square Feet)	Classrooms	Permanent Capacity	Year Built or Remodeled
Challenger	10	50,022	28	468	1987
Columbia	9.6	65,318	35	648	1989
Discovery	9.3	42,708	23	432	1988
Endeavour	9.4	55,939	20	408	1994
Fairmount	15	67,293	28	528	1999
Horizon	19	56,262	29	600	1990
Mukilteo	9.8	41,706	20	432	1981
Odyssey	10.9	60,631	26	576	2003
Olivia Park	9.5	49,881	27	552	1992
Picnic Point	10	40,996	20	408	1981
Serene Lake	10	49,230	20	372	1994
<b>TOTAL</b>		<b>579,986</b>	<b>276</b>	<b>5,424</b>	

**Table 2 - Middle School Permanent Classroom Inventory**

Middle School	Site Size (Acres)	Building Area (Square Feet)	Classrooms	Permanent Capacity	Year Built or Remodeled
Explorer	29.5	136,205	50	948	2003
Harbour Pointe	17.8	110,400	48	853	1993
Olympic View	25.2	105,296	43	769	1994
Voyager	16	106,954	45	822	1993
<b>TOTAL</b>		<b>458,855</b>	<b>186</b>	<b>3,392</b>	

**Table 3 - High School Permanent Classroom Inventory**

High School	Site Size (Acres)	Building Area (Square Feet)	Classrooms	Permanent Capacity	Year Built or Remodeled
ACES Alternative*	5.8	27,001	13	200	1997
Kamiak	60.7	256,129	82	1,666	2002
Mariner	37.1	276,668	90	1,852	2003
<b>TOTAL</b>		<b>559,798</b>	<b>185</b>	<b>3,718</b>	

\*Includes square footage for 9 relocatable classrooms considered permanent at this site.

Note: Numbers may not total due to rounding.

**Table 4 - Relocatable Classroom (Portable) Inventory\***

<b>School Name</b>	<b>Relocatables</b>	<b>Interim Capacity</b>	
<b>Elementary School</b>			
Challenger	11	264	
Columbia	0	0	
Discovery	10	240	
Endeavour	6	144	
Fairmount	8	168	
Horizon	5	120	
Mukilteo	10	216	
Odyssey	4	96	
Olivia Park	3	72	
Picnic Point	6	144	
Serene Lake	4	96	
<i>Elem. Subtotal</i>	<i>67</i>	<i>1560</i>	<i>59965 square feet</i>
<b>Middle School</b>			
Explorer	0	0	
Harbour Pointe	1	21	
Olympic View	4	85	
Voyager	0	0	
<i>MS Subtotal</i>	<i>5</i>	<i>106</i>	<i>4,475 square feet</i>
<b>High School</b>			
ACES Alternative	0	0	
Kamiak	16	326	
Mariner	8	156	
<i>HS Subtotal</i>	<i>24</i>	<i>482</i>	<i>21,480 square feet</i>
<b>TOTAL</b>	<b>96</b>	<b>2,148</b>	<b>85,290 square feet</b>

\*The District's portable classrooms are in good condition and with ongoing maintenance have an indeterminate remaining useful life. Portables are calculated at 895 square feet per classroom.

## Support Facilities

In addition to schools, the District owns and operates additional facilities that 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	Address	Building Area (Square Feet)	Site Size (Acres)
Administration	9401 Sharon Drive, Everett	26,608	9.15
Grounds/Maintenance	525 W. Casino Road, Everett	22,800	4
Service Center	8925 Airport Road, Everett	37,677	10
Lake Stickney*	1625 Madison Way, Lynnwood	37,443	9.8

\*Site of proposed new elementary school

**Table 6 - Other Facility Inventory**

Facility	Address	Building Area (Square Feet)	Site Size (Acres)
Sno-Isle Skills Center	9001 Airport Road, Everett	72,024	15

## Land Inventory

The District owns one undeveloped site:

- a one-acre site in Mukilteo Heights which is restricted for development by covenants and site size.

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

## IV. STUDENT ENROLLMENT PROJECTIONS

### Projected Student Enrollment 2014-2019

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Enrollment projections are generally most accurate for the initial years of the forecast period. Beyond the 5-6 year range, projected assumptions about economic or demographic trends may prove false, resulting in an enrollment trend that is quite different from the projection. For this reason it is important to monitor birth rates, new housing construction, and population growth on an annual basis as part of facilities management. 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 up projects when enrollment growth exceeds projections. For this reason, it is sometimes useful to project slightly more growth than might be expected so as to be better prepared for future events.

The Growth Management Act (GMA) requires that planning for public facilities be consistent with the 20-year population projections developed by the Office of Finance and Management (OFM) for the State of Washington.

The District has contracted with a consultant to develop a methodology for projections. The consultant has a twenty-four year history of working with local school districts in doing projections, including seven years as the demographer for the Seattle Public Schools and seventeen years as an independent consultant providing long-range projections for the Highline, Edmonds, Puyallup, Federal Way, Marysville, Seattle, Northshore, Bethel, South Kitsap, Bremerton, Bellevue, and Mukilteo school districts. The methodology employed by the consultant is a variation of the cohort survival method. Cohort survival compares enrollment at a particular grade in a specific year, to the enrollment at the previous grade from the prior year. For example, enrollment at the first grade is compared to the previous year's kindergarten enrollment. The ratio of these two numbers (first grade enrollment divided by kindergarten enrollment) creates a "progression ratio" providing a summary measure of the in-and-out migration that has occurred over the course of a year. This ratio can be calculated for each grade level. Once these ratios have been established over a period of years they can be averaged and/or weighted to predict the enrollment at each grade.

Cohort survival works well for every grade but kindergarten where there is no previous grade to use for comparison. At the kindergarten level enrollment is compared to the county birth cohort from five years prior to estimate a birth-to-k ratio. This ratio, averaged over several years, provides a method for predicting what proportion of the birth cohort will enroll at the kindergarten level. The District's percentage of this cohort has varied considerably over the past 7 years from a high of 12.4% to a low of 11.7%. Future forecasts assume that the District will enroll about 12% of the birth cohort with a gradual increase over time.

Cohort survival is a purely mathematical method, which assumes that future enrollment patterns will be similar to past enrollment patterns. It makes no assumptions about what is causing enrollment gains or losses and can be easily applied to any enrollment history. For this reason, cohort survival is a useful tool that anyone can use for projecting school enrollments.

Despite these advantages, cohort survival can produce forecast errors because it does not consider possible changes in demographic trends. New housing, in particular, can produce enrollment gains that might not otherwise be predicted from past trends. Or, alternatively, a district may lose market

share to private or other public schools. It is also possible that a slowdown in population growth will dampen enrollment gains. This appears to be what happened in King County in 1999 and 2000 when overall enrollment in the county declined for two straight years.

For the District forecast the cohort survival method is combined with information about market share gains and losses, information about population growth due to new housing construction, and information about regional trends. The population/housing growth factor reflects projected changes in the housing market and/or in the assumptions about overall population growth within the district's boundary area. The enrollment derived from the cohort model is adjusted upward or downward to account for expected shifts in the market for new homes, to account for changes in the growth of regional school age populations, and to account for projected changes in the District population.

Based on this projection methodology headcount enrollment is expected to increase to 16,087 by 2019. FTE enrollment is projected to increase to 15,350. Recognizing the uncertainty of the assumptions regarding growth, a higher growth model was also produced which predicts a headcount enrollment of 16,744 and an FTE enrollment of 15,980 by 2019.

A projection based on OFM population projections for Snohomish County was also produced. The District's October 2013 FTE enrollment (without the Skills Center) is 14,143. This is 1.9% of the estimated Snohomish County 2013 population of 730,500. Assuming that this percentage remains constant, and that the future population of the county aligns with the medium growth projection from the State produced for growth management, the District's FTE enrollment would grow to 15,586 FTE by 2019. An additional projection, using Snohomish County provided population data specific to the Mukilteo School District, results in slightly lower projection of 14,763 FTE by October of 2019.

A comparison of the FTE projections derived from the different methodologies is provided in Table 7. The table also includes a straight cohort survival model based on the trends of the past 5 years. The numbers from this model come from the OSPI facilities headcount forecast that is produced for all Districts in the State. To get the FTE numbers the headcount forecast was converted to an FTE forecast using the latest comparison between FTE and Headcount forecasts for the District, and the skills center numbers were excluded. This forecast shows a result that is slightly higher than the District medium range forecast in 2019 and slightly lower than the District high range forecast for that same year.

Due to the uncertainty of the assumptions regarding growth and the length of time it takes to initiate projects to deal with unanticipated growth, this plan uses "Projection #5 – District High" to determine facility needs during the time frame of the plan. (See Appendix B)

None of these forecasts are tied to the pending county planning alternatives since the various options will all impact the District in very different ways. Once the County has determined the growth direction they will use, future plans and projections will take them that into consideration. Even so, for shorter term planning the cohort survival methodology will continue to be a primary planning tool for the District.



**Table 7: Alternative FTE Projections 2014-2019**

FTE Projections	2013 Total	2014	2015	2016	2017	2018	2019	Total Change	% Change
1 Based on County Pop.	14,143	14,341	14,527	14,774	15,026	15,281	15,586	1,443	10.20%
2 Based on District Pop.	14,143	14,246	14,350	14,453	14,556	14,660	14,763	620	4.38%
3 Cohort Survival 5yr	14,143	14,354	14,611	14,818	15,071	15,354	15,680	1,537	10.87%
4 District Medium	14,143	14,413	14,680	14,811	14,963	15,137	15,350	1,207	8.53%
5 District High	14,143	14,576	14,914	15,143	15,396	15,699	15,980	1,837	12.99%

1. Assumes enrollment is a constant percent of the county population
2. Assumes enrollment is a constant percent of the District population
3. Cohort Survival Forecast
4. Based on projected births, cohort averages and projected population/housing growth
5. Based on projected births, cohort averages and projected population/housing growth; higher growth

None of these projections take into account the potential for a change to full day kindergarten which is scheduled to be fully implemented by 2018. Table 9 and Appendix B are both adjusted for this change.

### **Enrollment Projections to 2035**

Student enrollment projections beyond 6 years are somewhat speculative since economic or demographic trends could change. A long range forecast for the District was produced by the consultant demographer based on general assumptions about continued growth in housing/population and births. The “District Medium” forecast was used in estimating capacity needs because of its consistency with the County estimates based upon population projections. The District’s FTE enrollment is projected to be 18,461 by 2035 when adjusted for full time kindergarten.

## 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 (2014-2019). 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 as indicated in Tables 9 & 10. By the end of the six-year forecast period (2019), additional classroom capacity will be needed as follows:

**Table 8 – New Un-housed Students in 2019**

Grade Span	New Un-housed Students
Elementary (K-5)	652*
Middle School (6-8)	618
High School (9-12)	504
<b>Total (K-12)</b>	<b>1,774</b>

\*2019 balance of 548 students minus 1200 students if no schools are built in 2016 and 2017. See Table 9 BOLD

Projected future capacity needs are depicted in Table 9. They are derived by applying the projected number of students to the projected capacity. Planned improvements by the District through 2019 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 VI.)

Current enrollment at each grade level is identified in Table 9. The District is currently over capacity at the elementary level by 1099 students, there is no deficiency at the middle school level, and has 577 un-housed students at the high school level. Future capacity deficiency calculations are net of these figures to ensure that only un-housed students from growth are considered in determining if the District qualifies for the collection of impact fees. In 2018, the state is required to fund full day kindergarten for all students so that FTE capacity is added to the existing deficiency in the 2018 calculations. Even though existing unhoused students cannot be counted in determining impact fees, they still create capacity challenges for the District. The District’s enrollment projections, in Table 9, have been applied to the existing capacity and the District will be over capacity at the elementary level by 2,351 students, at the middle school level by 618 students and at the high school level by 1,080 students if no capacity improvements are made by the year 2019.

The District expects that .472 students will be generated from each new single family home in the District and that .311 students will be generated from each new multi-family 2+ unit, duplex or townhome. These numbers are based upon the District’s student generation rates (Table 11).

The District’s six-year capital improvement plan to address these deficiencies is found in Table 10.

**Table 9 - Projected Student FTE Capacity (2013 - 2019)**

Elementary								
	2013	2014	2015	2016	2017	2018	2019	2035
Existing Capacity	5424	5424	5424	5424	6024	6624	6624	6624
Added Capacity				600	600			
Total Capacity	5424	5424	5424	6024	6624	6624	6624	6624
Enrollment*	6523	6763	6852	6962	7103	7799**	7775	8689
Surplus (Deficiency)	-1099	-1339	-1428	-938	-479	-1175**	-1151	-2065
Less 2013 Existing Deficiency***	1099	1099	1099	1099	1099	1699**	1699	1699
New Development Deficiency	0	-240	-329	161	620	524	<b>548</b>	-366
Middle School								
	2013	2014	2015	2016	2017	2018	2019	2035
Existing Capacity	3392	3392	3392	3392	3392	3392	3392	3392
Added Capacity								
Total Capacity	3392	3392	3392	3392	3392	3392	3392	3392
Enrollment*	3325	3434	3597	3691	3777	3821	4010	4482
Surplus (Deficiency)	67	-42	-205	-299	-385	-429	-618	-1090
Less 2013 Existing Deficiency***	0	0	0	0	0	0	0	0
New Development Deficiency	67	-42	-205	-299	-385	-429	<b>-618</b>	-1090
High School								
	2013	2014	2015	2016	2017	2018	2019	2035
Existing Capacity	3718	3718	3718	3718	3718	3718	3718	3718
Added Capacity								
Total Capacity	3718	3718	3718	3718	3718	3718	3718	3718
Enrollment*	4295	4379	4465	4489	4516	4649	4798	5362
Surplus (Deficiency)	-577	-661	-747	-771	-798	-931	-1080	-1644
Less 2013 Existing Deficiency***	577	577	577	577	577	577	577	577
New Development Deficiency	0	-85	-171	-195	-222	-355	<b>-504</b>	-1067

\* Actual FTE Enrollment for the 13/14 School Year as of October 2013.

\*\* Adjustment for Full Day Kindergarten to be funded in 2018. Included in existing deficiency not from development.

\*\*\* The number of existing un-housed students at the inception of this plan. Existing un-housed students are accommodated in portables.

Note: Calculations are based upon Kendrick's "High" FTE enrollment projections December 2013, except for the 2035 projection which uses District "Medium" FTE enrollment due to the high level of speculation around these numbers.

## **VI. CAPITAL FACILITIES FINANCING PLAN**

### **Planned Improvements**

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Funding for the proposed elementary school will require the passage of a bond issue. The new elementary facility will likely be constructed at the site of the current Lake Stickney where ECEAP and the District's Curriculum and Professional Development Department currently reside. The plan also provides for the purchase of additional property for future schools. While the school sites will likely be in the North end of the District, no specific sites have been identified at the writing of this Plan.

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;
- busing;
- increased class sizes; or
- a modified school calendar.

The six year financing plan adds two elementary facilities to reduce the number of unhoused students in grades 1 through 5, but the District will continue to need portable classrooms to alleviate past deficiencies. The plan does not provide new construction for the upcoming deficiencies at middle and high schools, growth will be accommodated through the addition of portables or implementing one of the space management methods listed above.

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**

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#### ***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.

#### ***Capital Projects Levy***

The District has passed a six-year capital projects levy that runs through 2016. Capital project levy dollars will be dedicated to additional modernization and major maintenance of buildings and grounds.

#### ***State School Construction Assistance***

State School Construction Assistance 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 OSPI can establish a moratorium on certain projects. School districts may

qualify for State School Construction Assistance Funds for specific capital projects based on a prioritization system. The District is currently eligible for State Construction Assistance Funds for capital projects at the high school level and for some modernization/new in lieu at the elementary level. State match does not cover all of the costs of construction and each district has a different matching ratio based upon the state's formula.

### *Land Sales*

The District currently has no property for sale.

### *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 VII.

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 2012-2017. The financing components include a capital projects levy, funds from bonds, impact fees and State Match funds.

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

**Table 10 – Six-Year Financing Plan**

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

Project	Level*	Anticipated Year						Total Cost	Possible Funding Sources					
		2014	2015	2016	2017	2018	2019		Bonds/Levy	SCA (State)	Land Sales	Impact Fees	Future Source	
New Elementary School at Lake Stickney Site	EL			\$33.50				\$33.50	X	X			X	X
New Early Learning/ Kindergarten Center at Fairmount site	EL				\$34.50			\$34.50	X	X			X	X
<b>Total Cost</b>								\$68.00						

Note: If planned construction projects do not fully add space needs for increased student populations, the District may elect to purchase relocatable (portable) classrooms to accommodate those students.

**Improvements Not Adding Permanent Capacity (Cost in Millions)**

Project	Level*	Anticipated Year						Total Cost	Possible Funding Sources					
		2014	2015	2016	2017	2018	2019		Bonds/Levy	SCA (State)	Land Sales	Impact Fees	Future Source	
Add multipurpose room/kitchen at Discovery	EL			\$3.50				\$3.50	X					
Remodel Explorer House 1 for program relocations	MS		\$6.50					\$6.50	X					
Provide permanent space for CBTC and District Warehouse	D		\$2.50					\$2.50	X					
Add girls' locker room at Marner	HS			\$3.10				\$3.10	X					
District wide security improvements	D		\$1.00	\$1.00				\$2.00	X					X
Update science classrooms	D		\$0.75	\$0.75				\$1.50	X					
Training/safety rooms and team meeting rooms at Kamiak fields	HS				\$1.30			\$1.30	X					
Replace tracks and fields at Kamiak and Marner High School	HS					\$2.00		\$2.00	X					
Install tracks and artificial turf at Harbour Pointe and Voyager	MS			\$2.60				\$2.60	X					
District wide wireless network	D	\$1.00	\$1.00					\$2.00	X					
New telecom system	D		\$2.00					\$2.00	X					
Modernize gym building at Olympic View/ New Music facilities	MS				\$14.70			\$14.70	X					
Refurbish Explorer Middle School locker rooms	MS			\$0.40				\$0.40	X					
Harbour Pointe music facilities	MS			\$0.60				\$0.60	X					
Improvements at Picnic Point and Mukilteo Elementary	EL		\$1.15					\$1.15	X					
HVAC at Marner High School	HS		\$0.50					\$0.50	X					X
Boilers at Olivia Park Elementary and Kamiak High School	EL/HS		\$1.00					\$1.00	X					X
DDC Systems at Discovery and Olivia Park elementary schools	EL			\$1.30				\$1.30	X					X
Improve learning and support facilities, modernize systems.	D	\$5.14	\$4.52	\$3.95				\$13.61	X					
Replace District Office Roof	D	\$0.75						\$0.75	X					
Repair Serene Lake asphalt	EL	\$0.60						\$0.60	X					
<b>Totals</b>								\$63.61						

\*E = Elementary School; \* MS = Middle School; \* HS = High School; \* D = District wide improvement

## 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

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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; and
  - 2) duplexes and townhomes; and
  - 3) multi-family/2-bedroom or more.
    - a. (In the past, the District calculated student generation rates for multi-family/studio or 1 bedroom units, but their impact on growth is negligible.)

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

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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. 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 11 - Student Generation Rates<sup>2</sup>**

<b>Unit Type</b>	<b>Elementary</b>	<b>Middle School</b>	<b>High School</b>	<b>TOTAL</b>
Single Family	.248	.096	.128	.472
Duplexes and Townhomes	.173	.057	.081	.311
Multi-Family (2+ Bedrooms)	.173	.057	.081	.311

***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.

<sup>2</sup> Complete data is contained in Appendix C. Numbers may not total due to rounding.



**School Construction Assistance Credit Variables**

1. Construction Cost Allocation - currently \$200.40 for new construction projects approved in July of 2014.
1. State Funding Assistance Percentage - percentage of State funds that the District expects to receive. For new construction and additions, the District is currently eligible to receive a maximum state match of 51.16% of *eligible* costs (as defined by the State).

**Tax Credit Variables**

A credit is granted to new development to account for future payments that 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 April 1, 201 the current interest rate is 4.38%.
2. Bond Levy Rate - current bond levy rate is \$0.39 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 \$318,628 for single family dwelling units; \$77,653 for one-bedroom multi-family dwelling units; and \$114,081 for two or more bedroom multi-family dwelling units.

**Proposed Mukilteo School District Impact Fee Schedule**

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Using the variables and formula described, impact fees proposed for the District are summarized in Table 3. See also Appendix D.

**Table 12 – School Impact Fees**

<u>Housing Type</u>	<u>Impact Fee</u> <u>Per Unit</u>
Single Family	\$ 3914
Duplexes and Townhomes	\$ 2952
Multi-Family (2+ Bedroom)	\$ 2952

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 until 2018. Due to a change in state funding formulas after 2018, all kindergarten students are counted as a full FTE as of that date. For purposes of this CFP, all other grades are adjusted to reflect actual FTE.

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 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: new students whose numbers exceed the program capacity of existing permanent facilities

**APPENDIX B**

**POPULATION AND ENROLLMENT DATA**

**APPENDIX B**

**PROJECTED STUDENT ENROLLMENT 2014 -2019  
District Estimate in FTE's)**

Grade level	Oct-13 <sup>(1)</sup>	Oct-14	Oct-15	Oct-16	Oct-17	Oct-18	Oct-19
K	594	578	577	583	603	1200	1206
1	1214	1315	1261	1246	1260	1302	1295
2	1159	1251	1347	1284	1270	1283	1327
3	1168	1162	1248	1366	1303	1288	1302
4	1226	1208	1197	1261	1381	1317	1301
5	1162	1248	1224	1222	1287	1409	1344
6	1125	1177	1258	1238	1236	1302	1426
7	1079	1144	1166	1273	1253	1251	1318
8	1121	1114	1173	1180	1288	1268	1266
9	1142	1154	1141	1198	1205	1315	1295
10	1151	1167	1172	1134	1192	1198	1308
11	964	1052	1059	1057	1022	1074	1080
12	1038	1005	1092	1100	1097	1062	1115
Total <sup>(2)</sup>	14143	14576	14914	15143	15396	16269	16583
School Type							
K-5 <sup>(3)</sup>	6523	6763	6852	6962	7103	7799	7775
6-8	3325	3434	3597	3691	3777	3821	4010
9-12	4295	4379	4465	4489	4516	4649	4798

**Notes**

Prepared with the assistance of Consultant Les Kendrick January 2014

(1) Oct-13 numbers are the actual student enrollment as of Oct. 2013

(2) Numbers may not total due to rounding

(3) Assumes half-day attendance for kindergarten students until 2018, Full day attendance after that.

STATE OF WASHINGTON  
SUPERINTENDENT OF PUBLIC INSTRUCTION  
SCHOOL CONSTRUCTION ASSISTANCE PROGRAM  
REPORT 1049 - DETERMINATION OF PROJECTED ENROLLMENTS  
SCHOOL YEAR 2013-2014

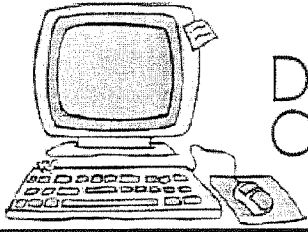
Snohomish/Mukilteo(31006)

Grade	--- ACTUAL ENROLLMENTS ON OCTOBER 1st ---					AVERAGE %		--- PROJECTED ENROLLMENTS ---					
	2008	2009	2010	2011	2012	2013	SURVIVAL	2014	2015	2016	2017	2018	2019
Kindergarten	1,067	1,056	1,095	1,061	1,138	1,188		1,183	1,206	1,229	1,253	1,276	1,299
Grade 1	1,100	1,097	1,177	1,181	1,154	1,214	107.50%	1,277	1,272	1,296	1,321	1,347	1,372
Grade 2	1,128	1,107	1,138	1,212	1,194	1,159	101.77%	1,235	1,300	1,295	1,319	1,344	1,371
Grade 3	1,064	1,085	1,154	1,190	1,170	1,168	99.86%	1,157	1,233	1,298	1,293	1,317	1,342
Grade 4	1,126	1,070	1,101	1,130	1,174	1,227	100.69%	1,176	1,165	1,242	1,307	1,302	1,326
Grade 5	1,081	1,120	1,082	1,140	1,125	1,162	100.52%	1,233	1,182	1,171	1,248	1,314	1,309
Grade 6	1,043	1,083	1,143	1,090	1,119	1,126	100.23%	1,165	1,236	1,185	1,174	1,251	1,317
<b>K-6 Sub-Total</b>	<b>7,609</b>	<b>7,618</b>	<b>7,890</b>	<b>8,004</b>	<b>8,074</b>	<b>8,244</b>		<b>8,426</b>	<b>8,594</b>	<b>8,716</b>	<b>8,915</b>	<b>9,151</b>	<b>9,336</b>
Grade 7	1,124	1,024	1,096	1,127	1,090	1,076	98.82%	1,113	1,151	1,221	1,171	1,160	1,236
Grade 8	1,065	1,131	1,042	1,130	1,122	1,122	101.59%	1,093	1,131	1,169	1,240	1,190	1,178
<b>7-8 Sub-Total</b>	<b>2,189</b>	<b>2,155</b>	<b>2,138</b>	<b>2,257</b>	<b>2,212</b>	<b>2,198</b>		<b>2,206</b>	<b>2,282</b>	<b>2,390</b>	<b>2,411</b>	<b>2,350</b>	<b>2,414</b>
Grade 9	1,126	1,104	1,105	1,058	1,141	1,143	101.14%	1,135	1,105	1,144	1,182	1,254	1,204
Grade 10	1,127	1,123	1,063	1,121	1,061	1,154	99.77%	1,140	1,132	1,102	1,141	1,179	1,251
Grade 11	1,400	1,401	1,438	1,414	1,505	1,455	131.34%	1,516	1,497	1,487	1,447	1,499	1,548
Grade 12	1,499	1,509	1,618	1,597	1,505	1,553	108.78%	1,583	1,649	1,628	1,618	1,574	1,631
<b>9-12 Sub-Total</b>	<b>5,152</b>	<b>5,137</b>	<b>5,224</b>	<b>5,190</b>	<b>5,212</b>	<b>5,305</b>		<b>5,374</b>	<b>5,383</b>	<b>5,361</b>	<b>5,388</b>	<b>5,506</b>	<b>5,634</b>
<b>DISTRICT K-12 TOTAL</b>	<b>14,950</b>	<b>14,910</b>	<b>15,252</b>	<b>15,451</b>	<b>15,498</b>	<b>15,747</b>		<b>16,006</b>	<b>16,259</b>	<b>16,467</b>	<b>16,714</b>	<b>17,007</b>	<b>17,384</b>

Notes: Specific subtotalling on this report will be driven by District Grade spans.

APPENDIX C

STUDENT GENERATION FACTOR REVIEW



DOYLE  
CONSULTING

ENABLING SCHOOL DISTRICTS TO MANAGE AND USE STUDENT ASSESSMENT DATA

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## **Student Generation Rate Study for the Mukilteo School District**

2/17/2014

This document describes the methodology used to calculate student generation rates (SGRs) for the Mukilteo School District, and provides results of the calculations.

SGRs were calculated for two types of residential construction: Single family detached, and multi-family with 2 or more bedrooms. Attached condominiums, townhouses and duplexes are included in the multi-family classification since they are not considered "detached". Manufactured homes on owned land are included in the single family classification.

1. Electronic records were obtained from the Snohomish County Assessor's Office containing data on all new construction within the Mukilteo School District from January 2006 through December 2012. As compiled by the County Assessor's Office, this data included the address, building size, assessed value, and year built for new single and multi-family construction. The data was "cleaned up" by eliminating records which did not contain sufficient information to generate a match with the District's student record data (i.e. incomplete addresses).
2. The District downloaded student records data into Microsoft Excel format. This data included the addresses and grade levels of all K-12 students attending the Mukilteo School District as of January 2014. Before proceeding, this data was reformatted and abbreviations were modified as required to provide consistency with the County Assessor's data.



3. **Single Family Rates:** The data on all new single family detached residential units in County Assessor's data were compared with the District's student record data, and the number of students at each grade level living in those units was determined. The records of 2,320 single family detached units were compared with data on 15,660 students registered in the District, and the following matches were found by grade level(s)\*:

GRADE(S)	COUNT OF MATCHES	CALCULATED RATE
K	98	0.042
1	107	0.046
2	94	0.041
3	100	0.043
4	77	0.033
5	100	0.043
6	79	0.034
7	69	0.030
8	75	0.032
9	72	0.031
10	83	0.036
11	67	0.029
12	75	0.032
K-5	576	0.248
6-8	223	0.096
9-12	297	0.128
K-12	1096	0.472

4. *Large Multi-Family Developments:* Snohomish County Assessor's data does not specifically indicate the number of units or bedrooms contained in large multi-family developments. Additional research was performed to obtain this information from specific parcel ID searches, and information provided by building management, when available. Information obtained included the number of 0-1 bedroom units, the number of 2+ bedroom units, and specific addresses of 0-1 bedroom units. If specific addresses or unit numbers of 0-1 bedroom units were not provided by building management, the assumption of matches being 2+ bedroom units was made. This assumption is supported by previous SGR studies.

*Small Multi-Family Developments:* This method included all developments in the County Assessor's data containing four-plexes, tri-plexes, duplexes, condominiums and townhouses. This data contained information on the number of bedrooms for all townhouses and condominiums. Specific parcel ID searches were performed for duplex and larger units in cases where number of bedroom data was missing.

5. **Multi-Family 2+ BR Rates:** The multi-family 2+ BR SGR's were calculated by comparing data on 2+ BR multi-family units with the District's student record data, and the number of students at each grade level living in those units was determined. The records of 804 multi-family 2+ BR units were compared with data on 15,660 students registered in the District, and the following matches were found by grade level(s)\*:

GRADE(S)	COUNT OF MATCHES	CALCULATED RATE
K	28	0.035
1	28	0.035
2	17	0.021
3	32	0.040
4	20	0.025
5	14	0.017
6	16	0.020
7	20	0.025
8	10	0.012
9	20	0.025
10	14	0.017
11	16	0.020
12	15	0.019
K-5	139	0.173
6-8	46	0.057
9-12	65	0.081
K-12	250	0.311

6. **Multi-Family 0-1 BR Rates:** Research indicated that 334 multi-family 0-1 BR units were constructed within District boundaries during the time period covered by this study. These units were compared with the data on 15,521 students registered in the District. No specific unit number matches were made.

7. **Summary of Student Generation Rates\*:**

	K-5	6-8	9-12	K-12
Single Family	.248	.096	.128	.472
Multi-Family 2+ BR	.173	.057	.081	.311

\*Calculated rates for grade level groups may not equal the sum of individual grade rates due to rounding.

APPENDIX D

SCHOOL IMPACT FEE CALCULATIONS

MUKILTEO SCHOOL DISTRICT NO .6

JURISDICTIONS: SNOHOMISH COUNTY, CITY OF MUKILTEO, CITY OF EVERETT

IMPACT FEE CALCULATION PREPARED April 2014

**School Site Acquisition Cost:**

Acres X Cost per Acre/Facility Capacity X Student Generation Factor

	Facility Acreage	Cost/ Acre	Facility Capacity	Student Factor SFR	Student Factor MFR (2+)	Cost/ SFR	Cost/ MFR (2+)
Elementary	11.5	\$ -	600	0.248	0.173	\$ -	\$ -
Middle	17.5	\$ -	750	0.096	0.057	\$ -	\$ -
High	25	\$ -	1500	0.128	0.081	\$ 0	\$ 0
						\$ 0	\$ 0

**School Construction Cost:**

Facility Cost/Facility Capacity X Student Generation Factor X % Permanent square feet

	% Perm	Facility Cost	Facility Capacity	Student Factor SFR	Student Factor MFR (2+)	Cost/ SFR	Cost/ MFR (2+)
Elementary	90%	\$ 68,000,000	1200	0.248	0.173	\$ 12,648	\$ 8,823
Middle	99%	\$ -	-	0.096	0.057	\$ -	\$ -
High	96%	\$ -	-	0.128	0.081	\$ -	\$ -
						\$ 12,648	\$ 8,823

**Temporary Facility Cost:**

Facility cost/facility capacity X Student Generation Factor X % Temporary square feet

	% Temp	Facility Cost	Facility Capacity	Student Factor SFR	Student Factor MFR (2+)	Cost/ SFR	Cost/ MFR (2+)
Elementary	10%	130,000	24	0.248	0.173	\$ 134	\$ 94
Middle	1%	130,000	21	0.096	0.057	\$ -	\$ -
High	4%	130,000	23	0.128	0.081	\$ 29	\$ 18
						\$ 163	\$ 112

**State School Construction Assistance**

Construction Allocation X SPI Footage X District Match X Student Generation Factor

	Const. Allocation	SPI footage	District Match %	Student Factor SFR	Student Factor MFR (2+)	Cost/ SFR	Cost/ MFR (2+)
Elementary	200.4	90	51.16%	0.248	0.173	\$ 2,288	\$ 1,596
Middle	200.4	117	0	0.096	0.057	\$ -	\$ -
High	200.4	130	51.16%	0.128	0.081	\$ 1,706	\$ 1,080
						\$ 3,994	\$ 2,676

**Tax Payment Credit**

	SFR	MFR (2+)
Average Assessed Value	\$318,628	\$114,081
Capital Bond Interest Rate	4.38%	4.38%
Years Amortized	10	10
Property Tax Levy Rate for Bonds	0.00039	0.00039
<b>Tax Payment Credit</b>	<b>-\$989</b>	<b>-\$354</b>

	SFR	MFR (2+) Duplexes and Townhomes
Site Acquisition cost	\$ 0	\$ 0
Permanent Facility Cost	\$ 12,648	\$ 8,823
Temporary Facility Cost	\$ 163	\$ 112
State Construction Assistance	\$ -3,994	\$ -2,676
Tax Payment Credit	\$ -989	\$ -354
FEE (AS CALCULATED)	\$ 7,828	\$ 5,905
FEE DISCOUNT 50%	\$ 3,914	\$ 2,952
	\$ 3,914	\$ 2,952

APPENDIX E

IMPACT FEE REPORT



**Mukilteo**  
School District

April 24, 2014

**District Office**  
9401 Sharon Drive • Everett WA 98204  
(425) 356-1274 • Fax (425) 356-1310

Gary Idleberg  
Snohomish County Planning and  
Development Services  
3000 Rockefeller, M/S 604  
Everett, Washington 98201

Dear Gary,

Enclosed please find Mukilteo School District's Annual Report for the collection and distribution of school impact fees as per the Interlocal Agreement.

This report covers the period of January 1, 2013 to December 31, 2013. We collected \$972,990.02 in impact fees; all fees are under GMA. The Transaction Recap report is included to show expenditures to vendors for the project at Discovery Elementary School

In you require further clarification, please do not hesitate to contact Josette Baines or me at (425) 356-1281.

Sincerely,

A handwritten signature in cursive script that reads "Carolyn A. Webb".

Carolyn A. Webb  
Executive Director  
Business Services

Enclosure

Cc: Debbie Fulton

**MUKILTEO SCHOOL DISTRICT NO. 6**

**ANNUAL REPORT OF SNOHOMISH COUNTY IMPACT FEE  
REVENUE & EXPENDITURES**

Reporting Period January 1, 2013 to December 31, 2013

<b>DATE OF EXPENDITURE</b>	<b>VOUCHER NUMBER</b>	<b>VENDOR</b>	<b>PROJECT</b>	<b>AMOUNT</b>
1/1/2013-12/31/2013	See Attached Transaction Recap		Discovery Elementary	<u>\$ 9,644.75</u>

<b>DATE OF REVENUE</b>	<b>SEPA</b>	<b>GMA</b>	<b>TOTAL COLLECTED</b>
1/1/2013-12/31/2013		\$ 972,990.02	<u>\$ 972,990.02</u>

Fd T GL PPSS AA OBBB LLL 4444 5555

20 Capital Projects  
 530 EXPENDITURES

Date	Src	Sub	Batch	Vendor Name/Ref	PO#/Line#	Description	Inv#/Desc2	Inv Date	Chk#/Rec#	Check Date	Amount
20 E 530 3114 21 7010 500 9180 0000											
01/01/13	AP		0115CS03	BLRB ARCHITECTS	2061100066	A&E SERVICES/DI.PORT.1112	51724	12/05/12	50487	01/15/13	383.30
02/08/13	AP		0215CS05	DUTTON ELECTRIC CO INC	2061100106	DI.PORT.UTIL.2012	9726-R	09/12/12	51181	02/15/13	2,542.02
04/03/13	AP		0415CS04	KING COUNTY DIRECTORS ASSOCIAT	2061100064	DI.DOUBLE PORTABLE/2012	3669711	03/26/13	52574	04/15/13	6,719.43
						*20 E 530 3114 21 7010 500 9180 0000					9,644.75
						*Accounts Payable					9,644.75

20 E 530 -----

20 -----



**Snohomish County Planning and Development Services**  
**2014 – 2019 Capital Facilities Plans**  
**PDS Technical Review Committee Comments**

<b>Contact Information</b>	<b>School District</b>	<b>MUKILTEO</b>
	<b>Contact Person</b>	Debra Fulton
	<b>Business Phone</b>	425.356.1330
	<b>E-mail-Address</b>	fultondm@mukilteo.wednet.edu
<b>Review Note for Page No.</b>	<b>School District Sign-Off</b>	<b>Suggested Correction(s)/Potential Issues</b>
Page 5	<p>Data is in FTE – added label.</p> <p>There is not enough information in the CFP for Reviewers to replicate the LOS number. District calculates permanent and portable classrooms at 30 for elementary and 33 students for secondary with some capacity for special education in FTE. I add the FTE label, but don't want to add a Table # since I would have to renumber the entire document.. (That was the problem on other pages when a Table was deleted.)</p>	<p>Thank-you for providing the comparison of minimum to current LOS! Is the maximum level of enrollment in FTEs?</p> <p>Not sure how the minimum LOS figures at bottom of page were calculated – could not replicate from other figures (classrooms, classroom planning capacity, utilization rate, etc.) provided in the plan.</p> <p>Even though it's fairly obvious, would be helpful to label LOS Figure/Table at the bottom of page 5.</p>
Page 7	They are correct.	The school capacity estimates seem pretty low, even allowing for special Ed and class planning use – suggest double-checking
Page 8	Added	...Might want to put asterisk by "Relocatable" heading and footnote, for clarity.
Page 11	<p>Added paragraph reference full day kindergarten after Table 7 on page 12.</p> <p>This section is a narrative produced by our demographer. He discusses various methodologies for predicting enrollment and tests them against each other and past results to see which is most reasonable.</p>	No mention made of all-day kindergarten; narrative continues to distinguish "headcount" from FTE enrollment to account for half-day K classes (however, second footnote to Table 9 mentions it as a year 2018 event); suggesting inserting a paragraph explaining it and how the plan addresses it.

	The methodologies include district level projections.	Projection is based on "OFM population for Snohomish County". Should district populations not be used here?
Pages 11-12	Corrected. Thank you.	The narrative describes an alternative enrollment forecast using the total <u>county</u> population as the basis for the student/population ratio – (Table 7 also uses the estimated <u>district</u> population for this, as most other districts do).
	Added last paragraph on page 11.	Narrative states on page 11, 3 <sup>rd</sup> paragraph, that the FTE projection based on the County population is 15,072 FTE by 2019 – this does not match the information contained in Table 7, page 12 (which shows 15,586).
		Not clear whether any of the enrollment forecasts are tied to one of the county plan alternatives – narrative should mention these alternatives and how they were used (or why not used).

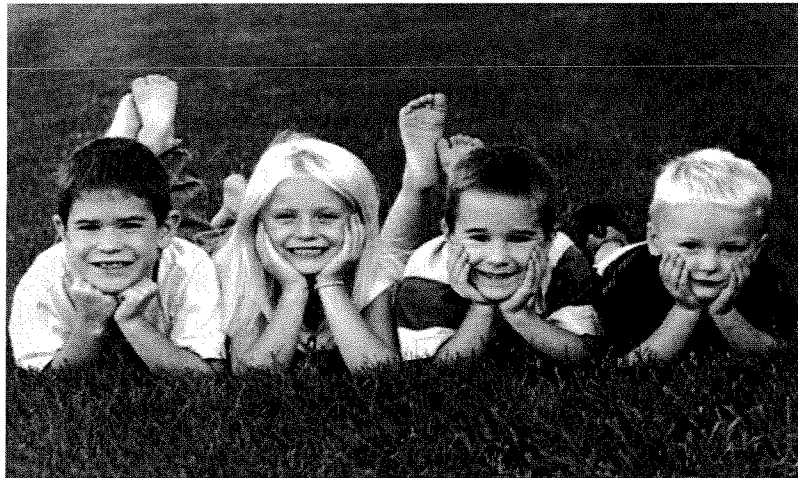
Review Note for Page	School District Sign-Off	Suggested Correction(s)/Potential Issues
Page 12 / Table 7	Corrected. Thank you.	<ul style="list-style-type: none"> <li>• Typo in year 2016 "district high" figure</li> <li>• "District high" figures for years 2017 and 2018 do not agree w/figures in Appendix B (presumably because all-day K is reflected in Appendix B but not in Table 7) – should explain in footnote or narrative.</li> </ul>
	Note added.	District High figure for 2016 is identical to the 2013 total...typo?
Page 12 & 14, Appendix B	Note added to explain the full day kindergarten is not included here but is included on Table 9 and Appendix B.	The FTE projections shown in Table 7, page 12, for the "Projection #5 – District High" do not match the district total enrollment projections shown on page 14 and in Appendix B.

Pages 13-16	Agreed. A Table was deleted and references were not updated. Thank you.	<b>Table references need correcting.</b>
	Influence of full day kindergarten is now discussed on Page 12 and in the footnote to Table 9.	The influence of all-day kindergarten should be discussed.
Page 14	Corrected, thank you.	There appear to be a few errors in the elementary school portion of Table 9 (surplus/deficiency figures for 2018 and 2035; total capacity for 2017).
Page 15	Added to paragraph 3.	Suggest a brief explanation of why the projected deficiencies at the middle school and high school levels are not triggering any planned projects.
Page 20	Thank you.	Table # reference needs correcting.
		Table 3 summarizes HS Permanent Classroom Inventory – reference revision.
		Typo – reference to Table 12 in text.
Appendix B	Agreed. The historical data was included in the hard copy but didn't get scanned into the PDF	<b>Suggest including historical enrollment data here, as in the previous CFPs; also suggest including historical district population and student/population ratios from previous CFPs.</b>
Appendix D	We list portables in the Note on Table 10 as an alternative to built space. However, the impact fee calculation related to portable classrooms actually <u>reduces</u> the total impact fee. The formula requires that the unhoused students related to growth be served in the same ratio as the current district split between portable and permanent space. In our instance, the fee allows for the unhoused students to be served in 90% built space and 10% portable space rather than the higher fee of housing them in 100% built space	<b>Impact fee calculations include costs for portables, but there are no portables in the 6-year financing plan – not sure these are eligible costs.</b>
<b>Impact Fee Expenditures</b>	You're welcome.	Thank-you for including this!
<b>Impact Fee Calculation</b>	Added.	Duplexes and townhomes should be a category on the fee schedule. That fee is the same as the Multi-family 2+ bedroom fee.

# 2014 CAPITAL FACILITIES PLAN

*Nothing you do for a child is ever wasted.*

GARRISON KEILLOR, *Leaving Home*



NORTHSHORE SCHOOL DISTRICT NO. 417  
3330 MONTE VILLA PARKWAY  
BOTHELL, WASHINGTON 98021-8972

**"STRENGTHENING OUR COMMUNITY THROUGH EXCELLENCE IN EDUCATION"**

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## **Executive Summary**

### **SECTION 1 -- INTRODUCTION**

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

Presented herein, in conformance with the Washington State Growth Management Act, the Codes of King and Snohomish Counties, and the cities of Bothell, Kenmore, Kirkland and Woodinville, is the Capital Facilities Plan (CFP) of the Northshore School District (NSD). This CFP is intended to provide a snapshot of projected student enrollment, site capacities, service over the long term (2014-2025), capital project schedules and capital financing over the next six years (2014-2020). The role of impact fees in funding school construction is addressed in Section 9 of this report.

#### **Summary**

Continued elementary enrollment has now pushed most schools in the northern and central service areas of the District into capacity deficit positions. Approval by the community of the 2014 bond allows the district to adopt grade reconfiguration (k-5, 6-8 and 9-12) which will provide some elementary capacity relief. That transition is tentatively scheduled for the 2017 school year. Grade reconfiguration, construction and opening of a new high school and other associated actions were part of a comprehensive plan recommended by the community based Enrollment Demographics Task Force (EDTF) and unanimously adopted by the School Board at its October 23, 2012 board meeting to address capacity issues and take advantage of instructional program benefits.

The 2014 CFP assumes the construction and opening of a new high school and grade reconfiguration in the 2017-2018 school year. Until grade reconfiguration occurs, portable capacity at applicable elementary schools will be maximized with increases based on the projected enrollment growth, program requirements, site security, circulation and gym/library capacities. State projections of a continued increase in birthrates could necessitate increased elementary or junior high capacity within the next five years. The CFP does not assume mandatory Full Day Kindergarten in its projections nor any change in the K-3 ratios, either of which would create significant capacity challenges. If the State Legislature funds implementation, future updates to the Capital Facilities Plan will reflect any adjustments.

#### **Overview of the Northshore School District**

The District services six jurisdictions: King County, Snohomish County, the City of Bothell, the City of Kenmore, the City of Kirkland and the City of Woodinville. The physical area and student population are roughly two-thirds in King County and one-third in Snohomish County. The District has a population of approximately 122,000 and an enrollment of 19,303. The District has twenty elementary schools, six junior

high schools, three high schools, one alternative schools program, and one early childhood center. The current grade configuration is K-6, 7-9 and 10-12 with a planned transition in the Fall of 2017 to a K-5, 6-8 and 9-12 model. The Urban Growth Area boundary line (UGA) splits the District, exacerbating capacity utilization challenges. Generally, schools on the east side of the UGA line are seeing declining enrollment while schools on the west side are seeing increasing enrollment. To optimize instructional program flexibility and maximize service levels in the most cost effective way possible, the District maintains 10% - 15% of its total design classroom capacity in relocatables (portables).

## **SECTION 2 -- STUDENT ENROLLMENT TRENDS AND PROJECTIONS**

### **Introduction**

Elementary enrollment has been growing steadily over the past few years, primarily due to larger birth cohorts and improvement in the real estate market. This wave of elementary enrollment growth has not yet moved into the high schools, whose enrollments have fluctuated within a fairly narrow range.

Projections, based on state and local jurisdiction provided data, indicate that this trend of an improved real estate market and increased birth cohorts will continue to fuel higher enrollments over the next decade. The birth cohorts since 2006 have been substantially larger than the numbers seen between 1996 and 2005. As a result, continued growth is expected in K-12 enrollment, especially elementary enrollment. It is expected that a marked increase in K-12 enrollment between 2015 and 2025 will be seen.

The real estate market has also been much stronger in the past two years. Since 2007 when home sales and prices began dropping, enrollment trends in the region have been transformed. Urban job centers, like Seattle, Bellevue, and Kirkland, saw better than expected population and K-12 enrollment gains between 2007 and 2011, primarily due to the fact that fewer people were leaving these areas to buy houses in the outlying regions of the Puget Sound. In the past two years this has reversed with, population and K-12 enrollment gains from more people being willing to buy houses away from the urban job centers. During this time, Northshore, Shoreline, Auburn, and Federal Way, which saw declines in enrollment between 2007 and 2011, have all shown enrollment increases.

Similar to past years, this year's District projections considered regional and local trends in population growth and housing, along with consideration of any market share gains or losses that might be attributable to private schools. In addition, assumptions and corresponding projections were analyzed down to the feeder pattern level. Growth rates were adjusted based on permit information specific to those respective areas. The resulting trends were used to further refine the projection methodology for both headcount and FTE forecasts used in this document. The following section describes in more detail the assumptions used to develop the forecast and compares the result of this projection to other available methodologies.

### **Methodology**

Numerous methodologies are available for projecting long-term enrollments. The most common method is known as cohort survival, which tracks groups of students through the system and adjusts the populations to account for the average year-to-year growth. For example, this year's fourth grade is adjusted based on the average enrollment trend of the past in order to estimate next year's fifth grade enrollment. This calculation method considers the past five years' trends to determine the



average adjustment factor for each grade, or cohort. The method works well for all grades except kindergarten, where there is no previous year grade. At kindergarten two methodologies are generally used. First, one can use a linear extrapolation from the previous five years, assuming that there is a trend. Or, alternatively, one can compare the kindergarten enrollment to births from five years prior to calculate a "birth-to-k" ratio. For example, kindergarten enrollment in 2013 is divided by the total births in King and Snohomish counties in 2008 to produce a birth-to-k ratio. The average ratio for the last five years can then be applied to births in subsequent years to estimate kindergarten enrollment.

The cohort survival method has been used by OSPI to predict enrollment for all districts in the state. In past years, OSPI has used a 6-year cohort average for grades 1-12 and a linear extrapolation method at kindergarten. In 2008, OSPI commissioned a study to evaluate the effectiveness of this method for predicting enrollment. The report recommended the use of the "birth-to-k" method for predicting kindergarten enrollment and the use of a housing adjustment factor for Districts that are likely to be impacted by large numbers of new housing developments. To date, these suggestions have not been implemented. The latest forecast from OSPI for the District continues to use cohort survival with a linear extrapolation at the kindergarten level.

Table 2-1 shows a projection for Northshore using the headcount projection provided by OSPI. This model converts the OSPI headcount forecast to an FTE forecast based on the latest data comparing headcount to FTE enrollment in Northshore. The OSPI forecast predicts a gradual increase in FTE enrollment over the next 6 years, with growth at all levels. The forecast also shows a marked increase at kindergarten over time. This is primarily due to the extrapolation of the recent upward trend at kindergarten into the future.

**TABLE 2-1**  
**OSPI Cohort Forecast converted to FTE Based on the Latest Northshore FTE Data**  
**October FTE**

Grade	Actual	Projections					
	13/14	14/15	15/16	16/17	17/18	18/19	19/20
K	757	761	778	796	814	831	849
1	1,566	1,650	1,661	1,699	1,738	1,777	1,815
2	1,640	1,603	1,689	1,700	1,739	1,779	1,819
3	1,559	1,677	1,639	1,727	1,738	1,778	1,819
4	1,550	1,592	1,714	1,675	1,765	1,776	1,817
5	1,550	1,574	1,618	1,742	1,702	1,794	1,805
6	1,476	1,568	1,592	1,637	1,762	1,722	1,815
7	1,555	1,501	1,595	1,620	1,666	1,792	1,751
8	1,517	1,583	1,529	1,625	1,650	1,697	1,825
9	1,596	1,539	1,605	1,550	1,647	1,672	1,720
10	1,545	1,643	1,586	1,654	1,597	1,697	1,722
11	1,531	1,466	1,553	1,500	1,564	1,509	1,604
12	1,461	1,474	1,409	1,496	1,445	1,507	1,454
<b>Total K-6</b>	10,098	10,425	10,691	10,976	11,258	11,457	11,739
<b>Total K-5</b>	8,622	8,857	9,099	9,339	9,496	9,735	9,924
<b>Total 7-9</b>	4,668	4,623	4,729	4,795	4,963	5,161	5,296
<b>Total 6-8</b>	4,548	4,652	4,716	4,882	5,078	5,211	5,391
<b>Total 10-12</b>	4,537	4,583	4,548	4,650	4,606	4,713	4,780
<b>Total 9-12</b>	6,133	6,122	6,153	6,200	6,253	6,385	6,500
<b>District Total</b>	19,303	19,631	19,968	20,421	20,827	21,331	21,815
<b>Change</b>							
#		328	337	453	406	504	484
%		1.7%	1.7%	2.3%	2.0%	2.4%	2.3%

The cohort method displayed in Table 2-1 generally works well for districts that have a consistent trend of gradual increases or declines in enrollment. It is less reliable in districts where spikes in demographic trends (especially a marked increase or decrease in new housing) can lead to dramatic swings in enrollment from one year to the next. In addition, the use of the linear extrapolation method at the kindergarten level can result in a distorted trend since it does not consider changes in birth trends. Combining cohort survival with other information about births, housing, regional population trends, and even trends in service area and private school enrollment can sometimes provide for a more accurate forecast.

Table 2-2 shows an alternative to the OSPI forecast that combines cohort survival methodology with information about new housing, the District's predicted share of the King and Snohomish County birth cohort, and any predicted gains or losses in the District's market share. Market share refers to the District's share of the K-12 public school population in the region as well as any expected effect from private schools. For this forecast, the average rollup at existing grades was combined with estimates

of growth that might be expected from new housing, and assumptions about market share gains or losses that the District is likely to see at certain grade levels. Estimates of housing growth for this model were obtained from permit information provided by the respective jurisdiction. Table 2-2 shows the forecast based on this methodology.

This forecast produces a result that is lower than the OSPI forecast. This is primarily due to the kindergarten projection. The linear extrapolation method that OSPI uses does not consider the predicted changes in birth trends, or any assumptions about Northshore's share of future cohorts. The District model predicts a lower kindergarten enrollment over time than the OSPI forecast, because it assumes that Northshore's share of the county birth cohorts will remain relatively consistent over the course of the forecast.

In addition to kindergarten, the other main difference pertains to housing. Permit information that the District has received from the jurisdictions shows relatively strong enrollment gains in the first four years of the forecast, with a tapering off of this growth in the last two years. This reflects the fact that the recent pipeline housing data shows very few new projects in the pipeline. Once the current wave of housing development is finished we will need to see more new housing growth if enrollment is going to continue to grow in a similar fashion to recent trends. It should be noted, however, that the K-12 enrollment in the District is likely to continue growing beyond the six years of this forecast, due to continued gains in the K-12 population in the county (due to births). Northshore will see some share of this future K-12 growth, though it may be lower than recent years, if new housing development lags the current trends.

Looking at the results of the model specifically, overall enrollment is predicted to increase between 2014 and 2019. In the initial years of the forecasts the largest gains are expected at the elementary level. Junior high and high school enrollment are expected to grow more strongly in the latter part of the forecast period as the larger elementary classes from recent years roll up through the grades.

Elementary enrollment is predicted to grow from 10,098 FTE in October 2013 to 10,787 FTE by October 2019. Junior high enrollment is projected to increase from 4,668 FTE in October 2013 to 5,225 FTE by October 2019. High school enrollment is projected to increase from 4,537 FTE in October 2013 to 4,721 FTE by October 2019.

**TABLE 2-2**  
**FTE Forecast - October Medium Case**  
**October FTE**

Grade	Actual	Projections					
	13/14	14/15	15/16	16/17	17/18	18/19	19/20
K	757	727	716	725	740	727	728
1	1,566	1,665	1,585	1,562	1,582	1,613	1,586
2	1,640	1,601	1,702	1,622	1,598	1,617	1,649
3	1,559	1,671	1,630	1,736	1,654	1,628	1,648
4	1,550	1,588	1,702	1,663	1,771	1,685	1,659
5	1,550	1,670	1,610	1,728	1,688	1,796	1,709
6	1,476	1,561	1,581	1,622	1,742	1,700	1,808
7	1,555	1,500	1,587	1,609	1,651	1,772	1,729
8	1,517	1,579	1,524	1,614	1,637	1,679	1,802
9	1,596	1,631	1,592	1,538	1,629	1,651	1,694
10	1,545	1,642	1,574	1,639	1,584	1,677	1,700
11	1,531	1,459	1,550	1,487	1,549	1,496	1,584
12	1,461	1,487	1,400	1,488	1,429	1,487	1,437
<b>Total K-6</b>	10,098	10,483	10,526	10,658	10,775	10,766	10,787
<b>Total K-5</b>	8,622	8,922	8,945	9,036	9,033	9,066	8,979
<b>Total 7-9</b>	4,668	4,710	4,703	4,761	4,917	5,102	5,225
<b>Total 6-8</b>	4,548	4,640	4,692	4,845	5,030	5,151	5,339
<b>Total 10-12</b>	4,537	4,588	4,524	4,614	4,562	4,660	4,721
<b>Total 9-12</b>	6,133	6,219	6,116	6,152	6,191	6,311	6,415
<b>District Total</b>	19,303	19,781	19,753	20,033	20,254	20,528	20,733
<b>Change</b>							
#		478	(28)	280	221	274	205
%		2.5%	-0.1%	1.4%	1.1%	1.4%	1.0%

### Long Range Projections

The methodology described above was extrapolated to 2020 and 2025 to produce a longer-range forecast. In general, this model assumes that enrollment in the period between 2019 and 2025 will grow at a rate that is similar to the overall county. Similar to the methodology used above, the average cohort survival rollup-rate for each grade was calculated and applied at each grade level to predict the growth in each subsequent year. Kindergarten was projected using the birth-to-k ratio method described above. Longer-range birth forecasts were arrived at by applying the most recent average of the fertility rates in each county (two year average) to the projected number of women expected to reach their child-bearing years over the next decade (using the medium range county growth management forecasts from the Office of Financial Management at the State of Washington). The average birth-to-k ratio for the last 5 years was then applied to the projected births to predict kindergarten enrollment. A growth factor was then applied to each of the grade level projections (K-12) to account for expected K-12 population growth between 2019 and 2025.

This factor was based on a forecast of county K-12 enrollment which used cohort survival trends, birth forecasts, and projected population growth for the county (again using the medium range county forecast obtained from OFM).

Using this methodology the District's enrollment shows continued growth from 2019 to 2025. FTE enrollment in 2020 is projected to be 21,007 and projected FTE enrollment for 2025 is predicted to be 21,579 FTE. This longer range model assumes that the State forecasts of more births, more K-12 growth, and continued population growth for the Puget Sound are reasonably accurate.

Obviously, future growth trends are somewhat uncertain. Changes in population growth, fertility rates, or a sharp downturn in the economic conditions in the Puget Sound region could have a major impact on long term enrollment, making it significantly lower or higher than the current estimate. Given this uncertainty, the current projection should be considered a reasonable estimate based on the best information available, but subject to change as newer information about trends becomes available.

TABLE 2-3  
Projected FTE Enrollment

Level	2015	2020	2025
Elementary:	10,527	10,713	10,821
Jr. High:	4,703	5,225	5,282
High School:	4,524	4,622	5,356
Total:	19,753 FTE	21,007 FTE	21,579 FTE

### COUNTY/OFM PROJECTIONS

Using OFM/County data as a base, the District projects a 2035 student FTE population of 26,027. This is based on the OFM/County data for the years 2000 through 2013 and the District's average fulltime equivalent enrollment for the corresponding years. For the years 2000 to 2013, the District's actual enrollment averaged 39.35% of the OFM/County population estimates. However, this figure is misleading in that it assumes that all of the District's students reside in Snohomish County. This is not the case given that the District's boundaries include both King and Snohomish County. As such, the projections are highly speculative and are used only for general planning purposes.

TABLE 2-3.1  
 Projected FTE Enrollment - 2035 OFM Estimates

Level	2013	2035
Elementary (K-5):	8,622	11,626
Jr. High (6-8):	4,548	6,132
High School (9-12):	6,133	8,269
Total:	19,303 FTE	26,027 FTE

\*Assumes that percentage per grade span will remain constant through 2035.

Note: Snohomish County Planning and Development Service provided the underlying data for the 2035 projections.<sup>1</sup>

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<sup>1</sup> The District has chosen to use Alternative #2 of the Snohomish County 2035 Population Forecast since it contains the medium range forecast of potential growth.

## **SECTION 3 -- DISTRICT STANDARD OF SERVICE**

### **Primary Objective**

Optimizing student learning is the heart of what the District strives for in establishing its service standard for classroom capacity utilization. This requires a constant review and assessment of instructional practices, student learning behaviors, learning environments and program development. An additional variable are changes in mandatory requirements dictated by the state, such as those being discussed relative to full day kindergarten and reduction in K-3 class sizes. These elements as well as demographic projections and cost considerations are weighed in determining service levels.

### **Grade Reconfiguration and Instructional Program Changes**

In the Fall of 2017, the District is planning on implementing a reconfiguration of its instructional model to a four year high school (9-12) program, a 6-8 middle school and a K-5 elementary school model. While the District has been successful in generating high graduation rates and test scores with its current grade configuration, the changing learning patterns, developmental needs and maturity level of our students will be more effectively met with this grade reconfiguration as well as provide a more effective match of resources with the needs of students. Specific room standards are not expected to change based on the new grade reconfiguration itself. Changes mandated by the State relative to the highly capable program will likely further complicate site capacity issues. Assessment of the impact is still in progress.

### **Existing Programs and Standards of Service**

The District currently provides traditional educational programs and nontraditional programs (See Table 3-1) such as special education, expanded bilingual education, remediation, alcohol and drug education, preschool and daycare programs, home school, computer labs, music programs, movement programs, etc. These programs and the associated learning environment are regularly reviewed to determine the optimum instructional method and learning environment at each school. The required space for these programs as well as any supporting space is determined by noise, level of physical activity, teacher to student ratios, privacy and/or the need for physical proximity to other services/facilities. Adequate space must exist for program flexibility, differing learning styles, program experimentation, project based learning and pre- and post- school activities. For example, service level capacities in rooms utilized for programs such as special education would reflect lower capacities of the defined service levels (See Table 3-2), eight versus 24 (for a standard size room or relocatables/portables). A second example is the Dual Language program with two dedicated classrooms at each grade level, in addition to the regular education classrooms. These classes have a scheduled use of 24 students per room.

Special teaching stations and programs offered by the District at specific school sites are included in Table 3-1.

**TABLE 3-1  
Programs and Teaching Stations**

	<b>Elementary</b>	<b>Secondary</b>
Computer Labs	X	X
Group Activities Rooms	X	
Elementary Advanced Placement (EAP)	X	
All Day Kindergarten	X	
Parents Active in Cooperative Education (PACE)	X	
Special Education	X	X
Special Education – Mid Level/Functional Skills & Academics	X	X
Learning Centers (LC)	X	X
Learning Assistance Program (LAP)/Title I (Elementary)	X	X
English Language Learners (ELL)	X	X
Dual Language (DL)	X	
Home School	X	X
Alternative School Program		X
Career Technical Education		X
International Baccalaureate (IB) and Advanced Placement (AP)		X
School-to-Work		X
Running Start		X
College in the High School		X

A number of the above programs affect the design capacity of some of the buildings housing these programs. Special programs usually require space modifications and sometimes have less density than other, more traditional programs; this potentially translates into greater space requirements. These requirements are part of the difference we see between design capacity and scheduled capacity (see page 14).

Teaching station loading is identified in Table 3-2. Class sizes are averages based on actual utilization as influenced by state funding and instructional program standards. The District's standard of service is based on state and/or contractual requirements.



**TABLE 3-2**  
**Standard of Service –Class Size (Average)**

<b>Classroom Type</b>	<b>Elementary – Average Students Per Classroom</b>	<b>Junior High – Average Students Per Classroom</b>	<b>High School – Average Students Per Classroom</b>
Kindergarten	23	NA	NA
Regular, Alternative, EAP	24	27	27
Regular (portables)	24	27	27
Special Education – Mid Level	12	12	12
Special Education – Functional Skills and Academics	8	8	8
Integrated - Regular & Special Education (15 regular & 6 special education students)	21	NA	NA
Special Education Preschool	8 (Sorenson & Cottage Lake)	NA	NA
Transitional Kindergarten	10 (Hollywood Hill & Lockwood)	NA	NA
Vocational	NA	27	27
Dual Language - assuming 2 classes per grade level	24	NA	NA

Snohomish County has requested that the District’s plan include a measurement of the current levels of service to compare to the District’s minimum levels of service. Table 3-3 shows the District’s average students per teaching station as a measurement of its minimum levels of service as of October 31, 2013.

**TABLE 3-3**  
**Average Students per Scheduled Teaching Station**

<b>Grade Level</b>	<b># of Scheduled Teaching Stations</b>	<b>FTE Scheduled Capacity</b>	<b>Minimum Level of Service(1)</b>	<b>FTE Enrollment</b>	<b>Average FTE / Teaching station</b>
K - 6	518	12,114	23.4	10,098	19.5
7 - 9	230	6,021	26.2	4,668	20.3
10 - 12	220	5,559	25.3	4,537	20.6
Total	968	23,694		19,303	

- (1) Capacity divided by the number of teaching stations for the respective year
- (2) Excludes alternative programs except SAS

## **SECTION 4 -- CAPITAL FACILITIES INVENTORY**

Under the Growth Management Act, a public entity must periodically determine its capacity by conducting an inventory of its capital facilities. Table 4 -1 summarizes the capacity owned and operated by the District. Information is also provided on relocatable classrooms (portables), school sites and other district owned facilities or land.

The effective capacity limit at each site will vary based on existing instructional programs, projected future programs and, where possible, the recommendation of local site administration. To monitor this, and for use in preliminary capacity planning, the District establishes design capacities. This is the maximum number of students a site can accommodate based on a standard room capacity of 54, 27, 24, or 12 FTE depending on room size. These figures are compared to the actual utilization or scheduled capacity on a regular basis. Scheduled capacity takes into consideration the specific programs that actually take place in each of the rooms. For example, capacities in rooms utilized for programs such as special education would reflect capacities of the defined service levels (See Table 3-2), eight versus 24 (for a standard size room or relocatables/portables). Due to the need to provide planning time and space for teacher preparation or other required services, some facilities will only support a design capacity utilization of 85%. In secondary schools where recent modernizations have added more teacher preparation space, the utilization percentage is higher.

### **Schools**

The District currently operates twenty elementary schools, six junior high schools, and three high schools. The District also has one alternative secondary school program, a home school program and an early childhood center.

**TABLE 4-1  
School Capacity Inventory (Including Relocatables)**

School	Year Built	Last Modernization or Capacity addition	Total # of Rooms		Capacity		# Students / Rm		Relocatables		
			Design	Schedule	Design	Schedule	Design	Schedule	# of	Schedule Capacity	% of Schedule
Arrowhead	1957	1994/2011	25	20	597	454	23.9	22.7	5	48	10.6%
Bear Creek	1988	2011	22	22	527	527	24.0	24.0	0	0	0.0%
Canyon Creek	1977	1999/2008	38	37	910	862	23.9	23.3	12	264	30.6%
Cottage Lake	1958	2005	23	17	550	382	23.9	22.5	0	0	0.0%
Crystal Springs	1957	2002/2010	30	29	718	694	23.9	23.9	10	216	31.1%
East Ridge	1991		22	17	526	406	23.9	23.9	0	0	0.0%
Fernwood	1988	2002/2010	41	33	860	788	21.0	23.9	15	190	24.1%
Frank Love	1990		32	28	761	665	23.8	23.8	10	168	25.3%
Hollywood Hill	1980	2001	25	17	598	406	23.9	23.9	2	0	0.0%
Kenmore	1955	2002/2011	27	23	646	526	23.9	22.9	5	48	9.1%
Kokanee	1994		37	31	861	765	23.3	24.7	11	216	28.2%
Lockwood	1962	2004/2011	30	25	669	609	22.3	24.4	4	48	7.9%
Maywood Hills	1961	2002	30	28	717	669	23.9	23.9	8	144	21.5%
Moorlands	1963	2002/2011	34	30	765	693	22.5	23.1	7	60	8.7%
Shelton View	1969	1999/2011	24	23	574	550	23.9	23.9	4	72	13.1%
Sorenson ECC *	2002										
Sunrise	1985		23	16	550	358	23.9	22.4	2	24	6.7%
Wellington	1978	2000/2011	28	26	669	597	23.9	23.0	4	47	7.9%
Westhill	1960	1995/2011	25	23	598	526	23.9	22.9	5	72	13.7%
Woodin	1970	2003	29	28	692	668	23.9	23.9	6	120	18.0%
Woodmoor	1994		46	45	1101	969	23.9	21.5	0	0	0.0%
<b>Subtotal</b>			<b>591</b>	<b>518</b>	<b>13,889</b>	<b>12,114</b>	<b>23.5</b>	<b>23.4</b>	<b>110</b>	<b>1,737</b>	<b>14.3%</b>
Canyon Park	1964	2000/2005	47	41	1,258	1,093	26.8	26.7	4	54	4.9%
Kenmore	1961	2002/2008/2011	39	36	1,054	928	27.0	25.8	1	27	2.9%
Leota	1972	1998	43	35	1,177	931	27.4	26.6	8	54	5.8%
Northshore	1977	2004	44	37	1,195	970	27.2	26.2	4	0	0.0%
Skyview	1992		45	45	1,246	1,156	27.7	25.7	6	162	14.0%
Timbercrest	1997		38	36	1,072	943	28.2	26.2	1	27	2.9%
<b>Subtotal</b>			<b>256</b>	<b>230</b>	<b>7,002</b>	<b>6,021</b>	<b>27.4</b>	<b>26.2</b>	<b>24</b>	<b>324</b>	<b>5.4%</b>
Bothell	1953	2005	87	77	2,251	1,918	25.9	24.9	6	24	1.3%
Inglemoor	1964	2000	81	69	2,125	1,807	26.2	26.2	6	162	9.0%
Woodinville	1983	1994/2008/2011	66	63	1,813	1,672	27.5	26.5	0	0	0.0%
<b>Subtotal</b>			<b>234</b>	<b>209</b>	<b>6,189</b>	<b>5,397</b>	<b>26.4</b>	<b>25.8</b>	<b>12</b>	<b>186</b>	<b>3.4%</b>
SAS	2010		19	11	279	162	14.7	14.7	0	0	0.0%
<b>Total K-12 All</b>			<b>1,100</b>	<b>968</b>	<b>27,359</b>	<b>23,694</b>	<b>24.9</b>	<b>24.5</b>	<b>146</b>	<b>2,247</b>	<b>9.5%</b>

\* Sorenson ECC has 10 classrooms designed and scheduled with 142 students that do not count toward district FTE.

## **Relocatable Classroom Facilities (Portables)**

Traditionally the District has kept 10% to 15% percent of its design capacity in relocatables. This percentage fluctuates, impacted by growth and changes in instructional program needs. Relocatables are utilized to help achieve efficient facility utilization and balance economic costs while encouraging innovation and new approaches, particularly for non-core or pilot programs. As funding for permanent capacity is secured through bond financing, or other changes occur, such as the revision of instructional programs or lower enrollment projections; the need for related relocatables are reassessed.

A typical portable classroom provides capacity for 24 students at the elementary level or 27 at the secondary level. Relocatables are used to meet a variety of instructional needs. Of the 146 relocatable classrooms that the District owns, 92 are used as classrooms housing students for scheduled classes or for pull out programs. Within the financial capabilities of the District, the intent is to minimize the size of the first group. Their actual use may reflect loads that are less than the standards of service identified in Section 3. Not included in the scheduled capacity are approximately 33 relocatables that are used for daycare, PTA, conference rooms/resource rooms, temporary housing in conjunction with pending modernizations or recently vacated as a result of the consolidation of some programs within other existing permanent space. A summary of relocatables is presented in Table 4-2.

**Table 4-2 Relocatable Classroom Summary**

School	Total # of Portables	Portables Scheduled (Note 1)	Designed Student Capacity	Scheduled Student Capacity	"Pull Out" Programs (Note 2)
Arrowhead	5	2	120	48	2
Bear Creek	0	0	0	0	0
Canyon Creek	12	11	288	264	1
Cottage Lake	0	0	0	0	0
Crystal Springs	10	9	240	216	0
East Ridge	0	0	0	0	0
Fernwood	15	8	238	190	2
Frank Love	10	7	240	168	1
Hollywood Hill	2	0	48	0	0
Kenmore	5	2	120	48	3
Kokanee	11	8	240	216	1
Lockwood	4	2	48	48	0
Maywood Hills	8	6	192	144	1
Moorlands	7	3	120	60	0
Shelton View	4	3	96	72	0
Sorenson ECC**	0	0	0	0	0
Sunrise	2	1	48	24	0
Wellington	4	2	95	47	2
Westhill	5	3	120	72	1
Woodin	6	5	144	120	1
Woodmoor	0	0	0	0	0
<b>Subtotal</b>	<b>110</b>	<b>72</b>	<b>2,397</b>	<b>1,737</b>	<b>15</b>
Canyon Park	4	2	108	54	0
Kenmore	1	1	27	27	0
Leota	8	2	216	54	0
Northshore	4	0	108	0	0
Skyview	6	6	162	162	0
Timbercrest	1	1	27	27	0
<b>Subtotal</b>	<b>24</b>	<b>12</b>	<b>648</b>	<b>324</b>	<b>0</b>
Bothell	6	2	162	24	1
Inglemoor	6	6	162	162	0
Woodinville	0	0	0	0	0
SAS	0				
<b>Subtotal</b>	<b>12</b>	<b>8</b>	<b>324</b>	<b>186</b>	<b>1</b>
<b>Total K-12 All</b>	<b>146</b>	<b>92</b>	<b>3,369</b>	<b>2,247</b>	<b>16</b>

Note 1: Excluded from Scheduled Capacity are portables used for OTPT/LAP/Science Labs/Computer Labs/Admin/ASB/Music

Note 2: "Pull Out" programs include OTPT/LAP/Science Labs/Computer Labs/Admin/ASB/Music but exclude Day Care/PTA/Resource/Conference Rooms/Counseling/Storage

## Other Facilities

In addition to 32 school sites, the District also owns and operates sites that provide transportation, administration, maintenance and operational support to the schools. The District also holds undeveloped properties that were acquired for potential development of a facility for instructional use. An inventory of these facilities is provided in Table 4-3 below. The new high school will be built on the 61 acres north of Fernwood Elementary. The remaining two undeveloped sites are located in the eastern and northern areas of the District respectively. Depending on possible grade configuration decisions, program changes and/or future growth, one or more of these sites may become an elementary or secondary school site.

**TABLE 4-3  
Inventory of Support Facilities & Undeveloped Land**

Facility Name	Status	Building Area (000 Sq Feet)	Site Size (Acres)
Administrative Center (Monte Villa)		49	5
Support Services Building		41	5
Paradise Lake Site			26
Warehouse	Leased	44	2
Transportation		39	9
"Anderson" site - possible site for additional capacity in the Growth Corridor			33
Land adjacent to Fernwood Elementary (New High School)			61

The District does not currently lease any facilities or property.

## SECTION 5 -- PROJECTED FACILITY NEEDS

### Near-term Facility Needs

Capacity needs resulting from changes in demographic growth patterns, instructional program or other variables are reviewed by District staff and a group of parents, educators, administrators, and consultants who comprise the Enrollment Demographic Task Force (EDTF). The EDTF examines enrollment projections, capacity considerations, student impacts, cost impacts, program choices, etc. and recommends potential solutions to the Board. If approved by the Board, these recommended actions are implemented by the District and then incorporated into the Capital Facilities Plan.

As noted earlier, the Urban Growth Boundary Line (UGA) splits the District service area, exacerbating capacity utilization challenges. Developers generally favor building inside the UGA since it allows for a higher number of homes per acre. The growth seen by the District reflects this, with schools outside the UGA declining in enrollment while schools inside the UGA (on the northern/western sides) see increased enrollment. This contributes to a situation where, in total, the District has excess capacity (Table 5-1) as capacity for schools outside the UGA see lower enrollment growth while schools inside the UGA see significantly higher growth. Once boundary changes and transportation options become prohibitive in rehousing students to areas of available capacity, the challenge becomes greater. Elementary capacity in the District's higher growth northern central corridor has been increased by the equivalent of more than an elementary school through permanent capacity additions, additional portables and changes in service boundaries. Despite these actions, projections indicate that the elementary capacity in this area will probably be insufficient to meet service levels within the next several years (Table 5-2). The proposed grade reconfiguration will provide capacity relief for the current growth at the majority of the elementary sites as indicated by a comparison of Table 5-2 & Table 5-3. Elementary capacities will remain tight at most northern corridor schools even after grade reconfiguration. If population growth continues or major changes in mandated programs occur, the area may require additional elementary and/or junior high capacity.

To meet continued growth in the central and northern corridors of the district, waivers have been limited and special-use permanent/relocatables are being converted into classroom space. Other options to address possible mandated changes in programs or unexpected high growth, such as leasing non-district space and considering boundary changes, are being implemented or under review.

**TABLE 5-1 School Enrollment vs. Design Capacity**

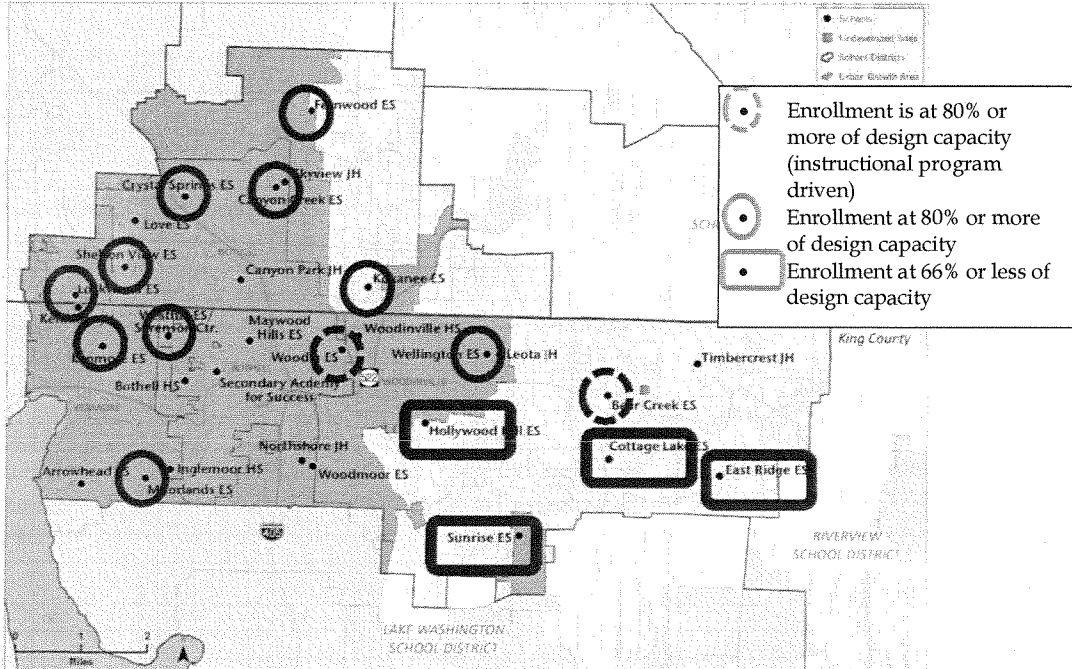
	2013 / 14	2014 / 15	2015 / 16	2016 / 17	2017 / 18**	2018 / 19**	2019 / 20**
<b>Elementary Enrollment</b>	10,098	10,383	10,527	10,657	9,034	9,067	8,979
Designed Permanent Capacity - Existing	11,492	11,492	11,492	11,492	11,492	11,492	11,492
Designed Capacity in New Permanent Facilities							
Designed Capacity in Relocatables	2,397	2,637	2,637	2,637	2,637	2,637	2,637
# of Relocatables included in Designed Capacity	100	110	110	110	110	110	110
Total Designed Capacity with Relocatables	13,889	14,129	14,129	14,129	14,129	14,129	14,129
<i>Surplus Capacity</i>	3,791	3,746	3,602	3,472	5,095	5,062	5,150
<b>Junior High School Enrollment</b>	4,668	4,609	4,703	4,761	5,030	5,151	5,339
Designed Permanent Capacity - Existing	6,354	6,354	6,354	6,354	6,354	6,354	6,354
Designed Capacity in New Permanent Facilities							
Designed Capacity in Relocatables	648	648	702	702	702	702	702
# of Relocatables included in Designed Capacity	24	24	26	26	26	26	26
Total Designed Capacity with Relocatables	7,002	7,002	7,056	7,056	7,056	7,056	7,056
<i>Surplus Capacity</i>	2,334	2,393	2,353	2,295	2,026	1,905	1,717
<b>High School Enrollment</b>	4,537	4,588	4,524	4,614	6,191	6,311	6,415
Designed Permanent Capacity - Existing	6,144	6,144	6,144	6,144	6,144	7,744	7,744
Designed Capacity in New Permanent Facilities					1,600		
Designed Capacity in Relocatables	324	324	324	324	324	324	324
# of Relocatables included in Designed Capacity	12	12	12	12	12	12	12
Total Designed Capacity with Relocatables	6,468	6,468	6,468	6,468	8,068	8,068	8,068
<i>Surplus Capacity</i>	1,931	1,880	1,944	1,854	1,877	1,757	1,653
<b>Total Enrollment</b>	19,303	19,580	19,753	20,032	20,255	20,529	20,732
Designed Permanent Capacity - Existing	23,990	23,990	23,990	23,990	23,990	25,590	25,590
Designed Capacity in New Permanent Facilities	-	-	-	-	1,600	-	-
Designed Capacity in Relocatables	3,369	3,609	3,663	3,663	3,663	3,663	3,663
# of Relocatables included in Designed Capacity	136	146	148	148	148	148	148
Total Designed Capacity with Relocatables	27,359	27,599	27,653	27,653	29,253	29,253	29,253
<i>Surplus Capacity</i>	8,056	8,019	7,900	7,621	8,998	8,724	8,521

\*\* Figures adjusted for Grade Reconfiguration K-5, 6-8 & 9-12



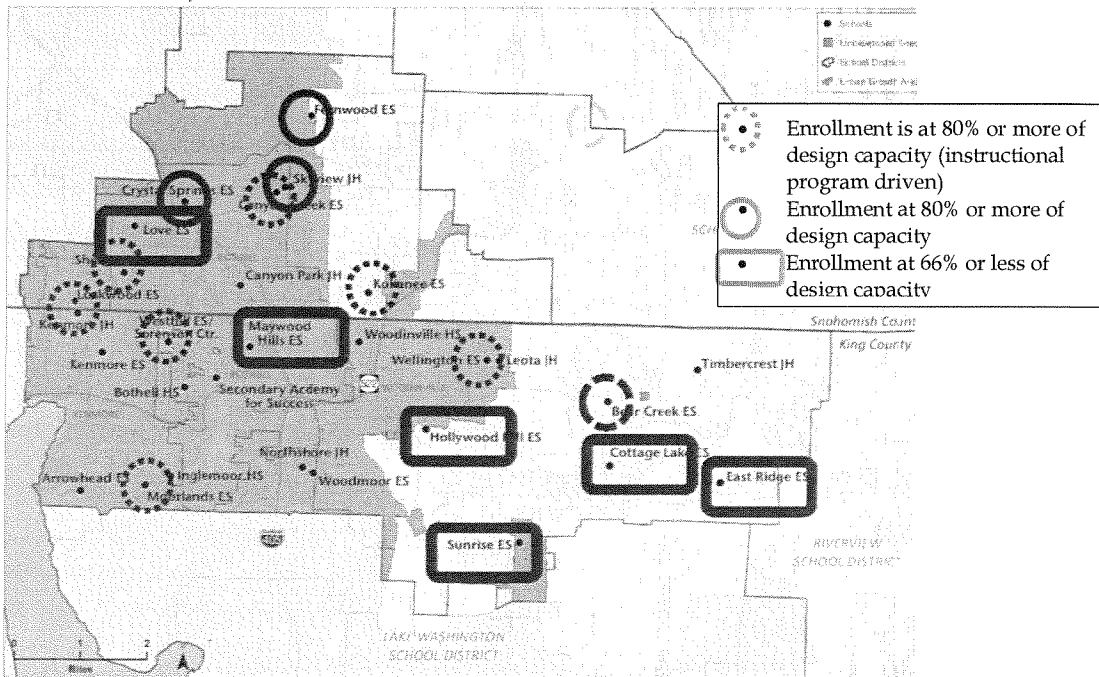
**Table 5-2 2014 Projected High and Low Capacity Utilizations (Assumes no program changes)**

Schools and Undeveloped Site in Northshore School District



**Table 5-3 Projected Elementary Capacities with Grade Reconfiguration in 2019 (Assumes no program changes)**

Schools and Undeveloped Site in Northshore School District



Note: "Instructional Program Driven" reflects school enrollments that result from program placement at a specific school

### Long-term Facility Needs (Year 2025)

A long-term projection of un-housed students and facilities needs is shown in Table 5-4 below. The capacity shown assumes the construction of a new high school, resulting from the successful February 2014 bond measure. As with any long term projections, many assumptions and estimates on housing must be made, increasing the risk associated with the accuracy of the projections. The data below does not reflect the challenges noted earlier in high growth areas where projected growth continues to challenge existing capacity.

**TABLE 5-4**  
**Year 2025 - Long-term Projection of Enrollment and Capacity**

Grade Level	FTE Designed Capacity	FTE Enrollment
Elementary	14,129	9,109
Jr. High	7,056	5,313
High School	8,068	7,157
Total	29,253	21,579

## **SECTION 6 -- GROWTH RELATED PROJECTS**

### **Planned Improvements - Construction to Accommodate New Growth**

If, as projected, elementary enrollment continues to increase, capacity increases from building programs, portable additions and boundary changes will be fully exhausted within several years. This CFP assumes that some elementary capacity relief from grade reconfiguration will occur in the Fall of 2017, as 6<sup>th</sup> graders move into the middle school program and 9<sup>th</sup> graders into the four year high school model. The CFP reflects the construction of a new high school, as shown in Table 6-1.

Long term projections indicate growth of possibly 1,800 new students in the next ten years. The CFP assumes that new capacity at the elementary and junior high level will be required. The District will continue to monitor the multitude of factors that shape our capacity needs, e.g.; instructional delivery, the economy, changes in planned land use, changes in mandated program requirements, permit activity, and birth rates, in order to help ensure needed instructional space is available when and where needed, and pursue additional land acquisition should construction of additional sites be necessary to accommodate those needs.

### **Planned Improvements – Existing Facilities (Building Improvement Program)**

In a number of other sites where the existing facility layout meets instructional needs and building structural integrity is relatively good, individual buildings systems are targeted for replacement or modernization to extend the life of the overall site. Almost 37 building systems at 21 schools have been replaced with this program, extending the useful life of the overall site. Other planned projects include renovating play fields and athletic fields, providing and upgrading technology and replacing/upgrading building systems. See Section 7 for a list of projects.

### **Modernizations**

Capacity additions at Canyon Creek Elementary and Fernwood Elementary were completed in the Fall of 2009 and Fall of 2010 respectively. The relocation of the alternative program (SAS) and Transportation was completed by the Fall of 2010. In 2012 modernizations were completed at Woodinville High School (Phase II) and Kenmore Junior High (Phase III).

## New Facilities and Additions

Funding is included in the 2014 bond.

**TABLE 6-1**  
**Planned Construction Projects – Growth Related**

<b>Project</b>	<b>Estimated Completion Date</b>	<b>Projected Student Capacity Added</b>
New High School – Grade Reconfiguration	2016/2017	1600 High School <i>(3722 188th St. SE Bothell)</i>

## SECTION 7 – CAPITAL INSTRUCTIONAL FACILITIES PLAN

**Six Year Capital Instructional Facilities Construction Schedule (Projects in Bold are Growth Related)**

<b>Year of Construction</b>	<b>Projects</b>
2013/2014	<b>New High School - Planning</b> BIP – Building Improvement Projects Field Improvements Technology Improvements Special Projects WHS Modernization Phase III <b>Portable Additions</b>
2014/2015	<b>New High School</b> WHS Modernization Phase III BIP – Building Improvement Projects Field Improvements Technology Improvements Special Projects <b>Portable Additions</b>
2015/2016	<b>New High School</b> WHS Modernization Phase III BIP – Building Improvement Projects Field Improvements Technology Improvements Special Projects
2016/2017	<b>New High School</b> <b>WHS Modernization Phase III</b> BIP – Building Improvement Projects Field Improvements Technology Improvements Special Projects
2017/2018	BIP – Building Improvement Projects Field Improvements Technology Improvements Special Projects <b>Junior High Modernization/Capacity Addition</b> <b>Elementary Capacity Addition</b>
2018/2019	BIP – Building Improvement Projects Field Improvements Technology Improvements Special Projects <b>Junior High Modernization/Capacity Addition</b> <b>Elementary Capacity Addition</b>

## **SECTION 8 -- CAPITAL FACILITIES FINANCING PLAN**

Funding of school facilities is typically secured from a number of sources including voter-approved bonds, state matching funds, impact fees, and mitigation payments. Each of these funding sources is discussed 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 issue. Bonds are sold as necessary to generate revenue. They are retired through collection of property taxes. Voters approved a bond of \$177.5 million in February 2014. Revenues from these bonds will be used to implement the Capital Facilities Plan set forth herein.

### **State Financial Assistance**

State financial assistance comes 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 funds or the State Board of Education can establish a moratorium on certain projects.

State financial assistance is available for qualifying school construction projects, however these funds may not be received until two to three years after a matched project has been completed. This forces the District to finance the complete project with local funds. Site acquisition and site improvements are not eligible to receive matching funds. These funds, as with all State funded programs, have been reduced and given the current state budget, could be eliminated. Also, if no changes to existing capacity are made, district demographics are projected to result in a loss of eligibility for state match at the secondary level. The District is currently ineligible for state match at the elementary level.

### **Impact Fees**

Authorization to collect impact fees has 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. Impact fees are generally collected by the permitting agency at the time of final plat approval or when building permits are issued. In the case of the four cities in the District, the Capital Projects Office collects fees prior to recording of plats, or issuance of permits. The District continues to assess its eligibility regarding the collection of impact fees. See the discussion regarding the impacts of growth in Section 6. The District may request impact fees in future CFP updates.

## Budget and Financing Plan

Table 8-1 is a summary of the budget that supports the Capital Facilities Plan. Each project budget represents the total project costs which include; construction, taxes, planning, architectural and engineering services, permitting, environmental impact mitigation, construction testing and inspection, furnishings and equipment, escalation, and contingencies.

The School District's planning for bond issues is outlined on Table 8-1. The District expects the proceeds of the bond sales to be supplemented by state financial assistance<sup>2</sup>. However, since the timing and amounts of these supplemental sources are unpredictable, they have not been included in the District's internal budgeting.

**TABLE 8-1  
Facilities Plan – Capital Budget**

2014 CAPITAL FACILITIES PLAN BUDGET *							
\$S IN 000S	FY 13-14	FY 14-15	FY 15-16	FY 16-17	FY 17-18	FY 18-19	FY 19-20
<b>MODERNIZATIONS/BUILDING SYSTEMS REPLACEMENT</b>							
Building Improvement Program	1,000	4,300	3,300	2,100		3,000	4,000
Woodinville High School Modernization Phase III	1,000	8,000	8,000				
SJH Modernization/Capacity					2,000	16,000	5,000
New Elementary School						2,500	8,000
Elementary School Modernization							5,000
<b>NEW CONSTRUCTION</b>							
New High School	19,100	47,000	56,100	5,800			
New Junior High Capacity (See Above)							
Technology	1,000	1,000	4,500		-	2,000	2,100
Fields	3,475	800	800		-	500	525
Code Compliance/Small Works	1,000	1,250	1,250	1,500	500	2,000	2,000
Site Purchase/Circulation	1,500	4,500					-
Overhead	1,100	1,100	1,100	1,100	1,100	1,100	1,100
Bond Expenses		542	542	115			
<b>TOTAL:</b>	<b>29,175</b>	<b>68,492</b>	<b>75,592</b>	<b>10,615</b>	<b>3,600</b>	<b>27,100</b>	<b>27,725</b>
Bond Expenditures	29,175	68,492	75,592	10,615	3,600	27,100	27,725

\* Note projects are dependent upon Board approval and passage of related bond measures by voters/New Junior High Capacity assumes an addition to an existing site

<sup>2</sup>State funding represents a significant challenge to the District. Although the District at times has a real need for additional classroom and support spaces, the criteria and formulas established by the state do not recognize this need, and as noted on page 28, the District has previously constructed growth-related additions without state financial assistance. Even where the District is eligible for State financial assistance, the present inadequate funding mechanism has resulted in significant delays in receiving the funds and a consequent reduction in their value.

The financing plan in Table 8-2 addresses only the growth-related projects from Section 7.

**TABLE 8-2  
Financing Plan – Growth Projects**

\$s in 000s	13/14*	14/15	15/16	16/17	17/18	Local Funds	State Financial Assistance	Impact Fees/Mit Payments
New High School Capacity – Growth Corridor/Grade Reconfiguration	21,100	47,000	56,100	5,800		130,000		
*Includes 2 million of spending from fiscal year 2012/2013								



## SECTION 9 -- IMPACT FEES

### School Impact Fees under the Washington State Growth Management Act

The Growth Management Act (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.<sup>1</sup>

### Methodology and Variables Used to Calculate School Impact Fees

Impact fees are 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 are applied for State Match Funds to be reimbursed to the District, property taxes and capital project funds to be proposed for future bond measures. Credit may also be given for construction projects that will be built to accommodate current un-housed students.

The District has recently made several boundary adjustments to increase District wide facility utilization and accommodate planned growth. The District is evaluating the impact of these changes, and may at a later point in the next six years seek the collection of impact fees for growth related projects. The District will update this CFP to reflect the new information.

### Impact Fee Schedules

The impact fee calculations in accordance with the formulas applicable to all jurisdictions are shown below:

**TABLE 9-1**  
**Impact Fee Schedule – All Jurisdictions**

Housing Type	Impact Fee per Unit
Single-family	\$0
Multi-family	\$0
Multi-family (2+ Bedroom)	\$0

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<sup>1</sup> Paying for Growth's Impacts - A Guide To Impact Fees, State of Washington Department of Community Development Growth Management Division, January, 1992

## DEFINITIONS

Throughout the Capital Facilities Plan a number of terms are used which are defined as follows:

**Boeckh Index.** WAC 392-343-060 establishes guidelines for determining the per square foot area cost allowance for new school construction. Washington State uses what is called a "Boeckh Index." The Boeckh Index is the average of a seven-city building cost index for commercial and factory buildings in Washington State, as reported by the E.H. Boeckh Company. The index is adjusted every two months from a base index of \$74.87, which was established in 1984.<sup>1</sup>

**CFP.** Capital Facilities Plan - refers to this document.

**DCD.** Washington State Department of Community Development.

**FTE.** Full Time Equivalent. This is 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 attending half-day programs are counted as 0.5 FTE.

**GFA (per student).** Gross floor area per student.

**GMA.** Washington State Growth Management Act.

**Multi-Family Dwelling Unit.** A residential dwelling unit contained in a building consisting of two or more attached residential dwelling units.

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

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

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

**Single-Family Dwelling Unit.** A detached residential dwelling unit designed for occupancy by a single family or household, including mobile homes.

**Student Factor or Student Generation Rate.** The Student Factor is the average number of students by grade span (elementary, junior high, and high school)

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<sup>1</sup> Paying For Growth's Impacts - A Guide To Impact Fees, State of Washington Department of Community Development Growth Management Division, January 1992.

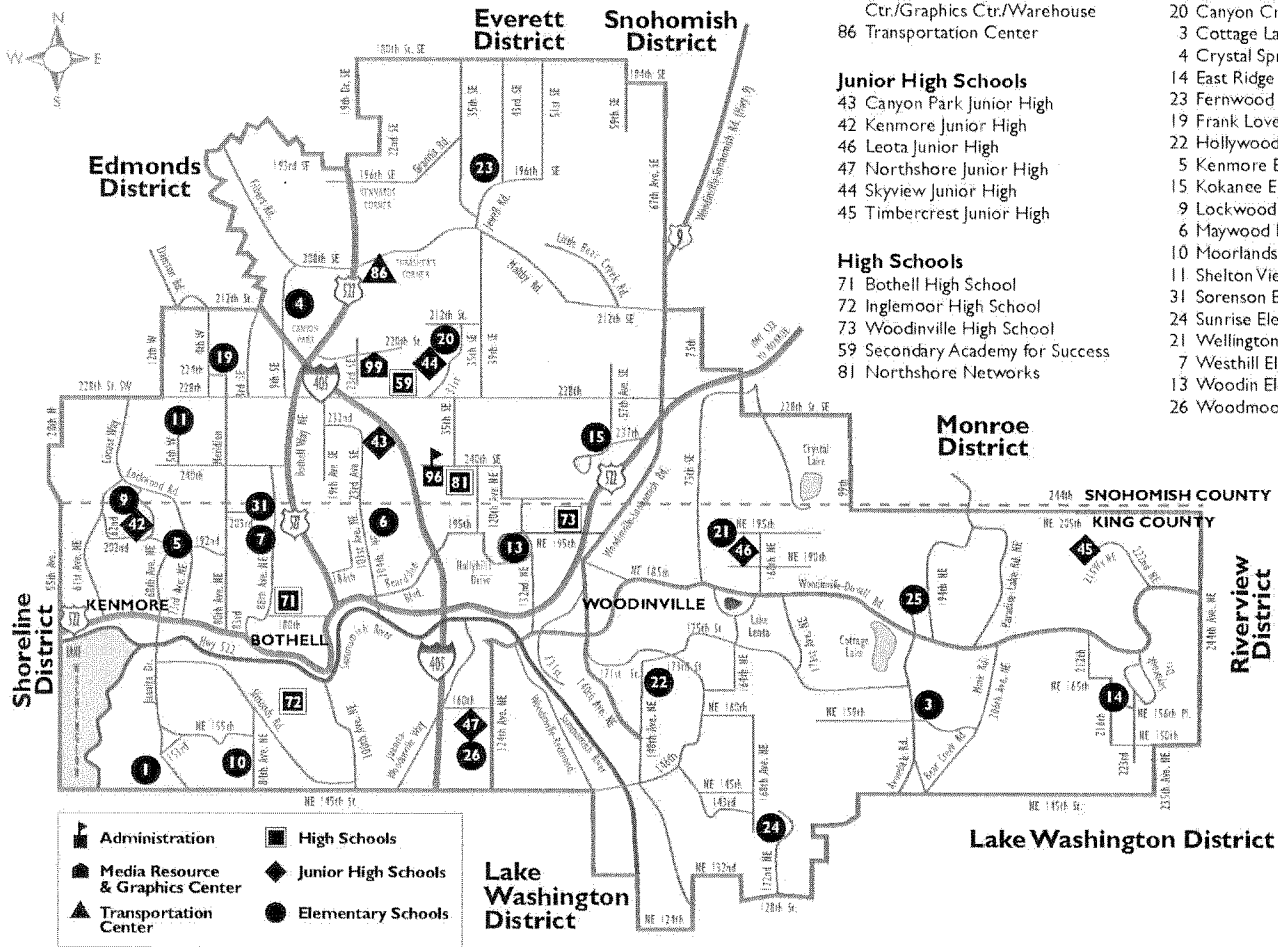
typically generated by each housing type. Student Factors are calculated based on a survey of all new residential units permitted by jurisdictions within the District during the most recent five-year period.

**Teaching Station.** A facility space (classroom) specifically dedicated to implementing the District's educational program. In addition to traditional classrooms, these spaces can include computer labs, auditoriums, gymnasiums, music rooms, other special education, and resource rooms.

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

**WAC.** Washington Administrative Code.

# Northshore School District



## Administrative/Resources

- 96 Administration Bldg
- 99 Support Services/Media Resource Ctr./Graphics Ctr./Warehouse
- 86 Transportation Center

## Junior High Schools

- 43 Canyon Park Junior High
- 42 Kenmore Junior High
- 46 Leota Junior High
- 47 Northshore Junior High
- 44 Skyview Junior High
- 45 Timbercrest Junior High

## High Schools

- 71 Bothell High School
- 72 Inglemoor High School
- 73 Woodinville High School
- 59 Secondary Academy for Success
- 81 Northshore Networks

## Elementary Schools

- 1 Arrowhead Elementary
- 25 Bear Creek Elementary
- 20 Canyon Creek Elementary
- 3 Cottage Lake Elementary
- 4 Crystal Springs Elementary
- 14 East Ridge Elementary
- 23 Fernwood Elementary
- 19 Frank Love Elementary
- 22 Hollywood Hill Elementary
- 5 Kenmore Elementary
- 15 Kokanee Elementary
- 9 Lockwood Elementary
- 6 Maywood Hills Elementary
- 10 Moorlands Elementary
- 11 Shelton View Elementary
- 31 Sorenson Early Childhood Ctr.
- 24 Sunrise Elementary
- 21 Wellington Elementary
- 7 Westhill Elementary
- 13 Woodin Elementary
- 26 Woodmoor Elementary

## SUMMARY OF CHANGES IN THIS YEAR'S CAPITAL FACILITIES PLAN

This year's Capital Facilities Plan is an updated document, based on the 2013 CFP. The significant changes reflected in the current Plan are identified below.

### **Section 2 - Student Enrollment Trends and Projections**

Enrollment projections were updated to reflect recent enrollment trends for the years 2015 through 2020 and new long range projections for the year 2025.

### **Section 3 – District Standard of Service**

Tables 3-2 & 3-3 were updated.

### **Section 4 - Capital Facilities Inventory**

Tables 4-1, 4-2 and 4-3 were revised to reflect reallocation of classroom utilization, movement of relocatable classrooms and design/schedule capacity and land acquisitions for possible additional capacity.

### **Section 5 - Projected Facility Needs**

Table 5-1 was changed to reflect new enrollment forecasts noted in Section 2, schedule/design capacity, grade reconfiguration, pullout utilization and changes to capacity noted in Sections 4 & 6. Tables 5-2 & Table 5-3 were added to graphically show current capacity utilization and potential utilization if a grade reconfiguration occurred. Table 5-4 was updated to the year 2025.

### **Section 6 - Growth Related Projects**

Updated to reflect current growth projections.

### **Section 7 - Capital Facilities Plan**

This section was updated to reflect changes in scheduled modernizations and non-growth related projects.

### **Section 8 – Finance Plan**

The finance plan has been updated.

### **Section 9 – Impact Fees**

Updated.

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# **Snohomish School District**

1601 Avenue D  
Snohomish, Washington 92890  
(360) 563-7330

# **CAPITAL FACILITIES PLAN**

## **2014 – 2019**

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*August 2014 Draft*

**Adopted**  
\_\_\_\_\_, 2014

## **Snohomish School District**

# **CAPITAL FACILITIES PLAN**

### **Board of Directors**

Jay Hagen, President

Leah Hughes-Anderson, Vice President

Shaunna Ballas

David Johnston

Josh Seek

### **Superintendent**

Dr. Bill Mester

For information on the Snohomish School District Facilities Plan,  
contact the Business Office at (360) 563-7240.

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## **SECTION 1: INTRODUCTION**

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

The purpose of this report is to update the Capital Facilities Plan (CFP) for the Snohomish School District pursuant to the Washington State Growth Management Act (GMA). 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.

This CFP is intended to provide the Snohomish School District (District), Snohomish County and other jurisdictions a description of the facilities needed to accommodate projected student enrollment at acceptable levels of service, including a detailed schedule and financing program for capital improvements, over the six year period of 2014-2019.

The CFP for the District was first prepared in 1994 in accordance with the specifications set down by the GMA. When Snohomish County adopted its GMA Comprehensive Plan in 1995, it addressed future school capital plans in Appendix F of the General Policy Plan. This part of the plan established the criteria for all future updates of the District CFP that are to occur every two years. This CFP updates the 2012 GMA-based CFP that was adopted by the District and the County in 2012.

In accordance with GMA mandates, and 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 school).
- 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 supporting data substantiating said fees.

In developing this CFP, the District followed the following guidelines set forth in the Snohomish County 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 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.

## **Overview of the Snohomish School District**

The Snohomish School District serves a population of about 9,563<sup>1</sup> students in kindergarten through grade 12. The City of Snohomish has a population of approximately 9,098 people while the County encompasses a larger population of 730,500 people. The District is located 35 miles north of Seattle in the heart of the Puget Sound region of Washington.

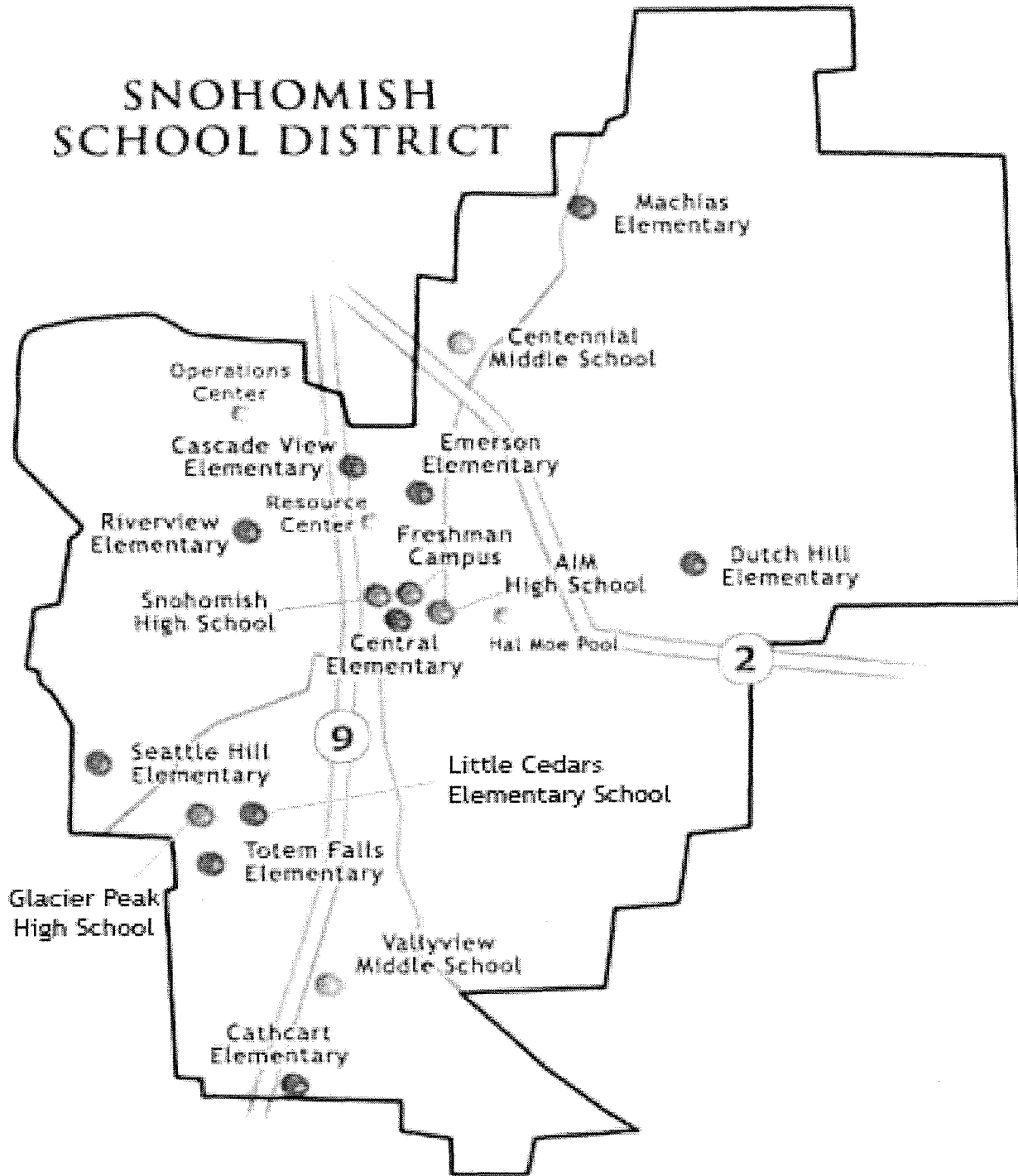
The District has preschool and Early Childhood Education and Assistance Program (ECEAP) programs, ten elementary schools (one grades K-2, one grades 3-6 and eight grades K-6), two middle schools (grades 7 and 8), two high schools (grades 9-12), and one alternative school (grades 9-12) (AIM), and a Parent Partnership Program (PPP) (grades K-12).

The District opened Glacier Peak High School in the fall of 2008. The District’s voters approved a construction bond in May 2008 to fund the renovation of Snohomish High School, the renovation/expansion of Valley View Middle School, the expansion of Centennial Middle School, the replacement/expansion of Machias and Riverview elementary schools, construction of a new aquatics center, and technology improvements. With the exception of the aquatics facility and technology improvements, these projects are now complete.

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<sup>1</sup> October 1, 2013 FTE. Unless otherwise noted, all enrollment and student capacity data in this CFP is expressed in terms of FTE (full time equivalent).

FIGURE 1  
MAP OF DISTRICT<sup>2</sup>



<sup>2</sup> Please contact the District's Business Office at (360) 563-7240 for a copy of the map in color.

## **SECTION 2: DISTRICT 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 facility 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). The facility standards that also typically drive facility space needs include educational program offerings, classroom utilization and scheduling requirements.

### **Facility Standards**

Creating a quality educational environment is the first priority of the Snohomish School District. It is the District's standard at this time that all students will be housed in permanent facilities and that classes will be run in one shift on a traditional school year schedule. Because of fluctuations in student population as a result of growth from new development and changing age demographics in different parts of the District, portables (temporary housing) are used ON A TEMPORARY BASIS in some locations. Portables will not be added if the quality of education at the facility is deemed by the District to be compromised by either total school size, impact upon core facilities such as restrooms, library space, playground space, hallways, etc. In addition, some facilities may not accommodate portables because of limitations on septic capacity. When it is not possible to increase population at a particular site, even with portables, the District will have the option of redistricting school boundaries if space is available at other facilities. The District may also request that development be deferred until planned facilities can be completed to meet the needs of the incoming population; however, the District has no control over the ultimate land use decisions made by the permitting jurisdictions.

The use of temporary housing (portables) is considered strictly temporary and this CFP outlines the future permanent facility needs of the District. Where adequate funding for new construction is not available from State match and impact fees, local bonds will be secured to construct the new facilities.

The State Legislature's implementation of requirements for all-day kindergarten and reduced K-3 class size will also impact school capacity and educational program standards. If the State Legislature funds implementation, the District will review its enrollment projections, educational program standards and school capacity inventory will make adjustments as necessary. These changes will also be reflected in future updates of this CFP.

### **Facility Standards for Elementary Schools:**

- The facility standard for grades K-3 is 22 students per classroom and 23 students per classroom for grade 4. For grades 5-6, the facility standard is 25 students per classroom.
- Optimum design capacity for new elementary schools is 600 students. However, actual capacity of individual schools may vary depending on the educational programs offered.

### **Facility Standards for Secondary Schools:**

- The facility standard for grades 7-8 is 28 students per classroom (except PE and Music).
- The facility standard for grades 9-12 is 30 students per classroom (except PE and Music).
- Optimum design capacity for new middle schools is 900 students. However, actual capacity of individual schools may vary depending on the educational programs offered.
- Optimum design capacity for high schools is 1,500 students. However, actual capacity of individual schools may vary depending on the educational programs offered.

### **Educational Program Standards**

In addition to factors that affect the amount of space required, government mandates and community expectations may affect how classroom space is used. Traditional educational programs offered by school districts are often supplemented by non-traditional, or special programs, such as:

- Secondary Academy
- Special education pre-school
- Special education – inclusion, resource, moderate and profound
- Highly Capable
- Bilingual education
- Preschool and early childhood programs
- Technology education
- Title I / LAP
- Drug and alcohol education
- Vocational and career education
- Music
- Daycare – before and after school
- Primary Intervention Program
- Physical education
- Outdoor education
- Multi-age classrooms
- Secondary Academies
- Parent Partnership Program
- Alternative Education (AIM High, Re Entry Program; PASS Program)
- USDA Food Service Program
- Extra Curricular, co-curricular and athletic programs

These special or nontraditional educational programs can have a significant impact on the available student capacity of school facilities.

Variations in student capacity between schools are often a result of what special or nontraditional programs are offered at specific schools. These special programs require classroom space that 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.

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

### **Educational Program Standards for Elementary Schools**

- Educational programs will be provided in a single shift each day. The facility will be available after normal hours for extended learning opportunities (remedial education) for selected students.
- Educational programs will be provided on the traditional school year schedule.
- Special education for students may be provided in a self-contained classroom.
- All students may be provided music instruction in a separate classroom.
- All students may be provided physical education instruction outside their regular classroom and outside of the cafeteria space.
- All students may be provided technology instruction outside of their regular classroom.
- Specialized work spaces for testing, specialists (i.e. OTPT/SLP's/psychologists), remedial programs, small group tutoring, and ESL programs.

### **Educational Program Standards for Middle and High Schools**

- Educational programs will be provided in a single shift each day. The facility will be available after normal hours for extra-curricular activities and for extended learning opportunities (remedial education) for selected students.
- Educational programs will be provided on a traditional school year schedule.
- 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 workspace during planning periods, it is not possible to achieve 100% utilization of all regular teaching stations throughout the day.

Therefore, classroom capacity should be adjusted to reflect the use of one period per day for teacher planning.

- Special education for students will be provided in a self-contained classroom.
- Specialized work spaces for testing, specialists (i.e. OTPT/SLP’s/psychologists), remedial programs, small group tutoring, and ESL programs.
- Identified students will also be provided other nontraditional educational opportunities in classrooms designated as follows:
  - Vocational Classrooms (i.e. business, auto shop, home-family life)
  - Program Specific Classrooms (i.e. music, drama, art, physical education, technology)
  - High School Academies
  - Alternative High School Programming

**Minimum Educational Service Standards**

The District will evaluate student housing levels based on the District as a whole system and not on a school by school or site by site basis. This may result in portable classrooms being used as interim housing, attendance boundary changes or other program changes to balance student housing across the system as a whole, while meeting the District’s paramount duties under the State Constitution. A boundary change or a significant programmatic change would be made by the District’s Board of Directors following appropriate public review and comment.

The District’s intent is to adhere to the target facility service standards noted above without making significant changes in program delivery. At a minimum, average class size in the grade K-8 classrooms will not exceed 35 students and average class size in 9-12 classrooms will not exceed 40 students. For purposes of this determination, the term “classroom” does not include special education classrooms or special program classrooms (i.e. computer labs, art rooms, chorus and band rooms, spaces used for physical education, and other special program areas). Furthermore, the term “classroom” does not apply to special programs or activities that may occur in a regular classroom or to classes held in assembly halls, gyms, cafeterias, or other common areas.

The minimum educational service standards are not the District’s desired or accepted operating standard.

The District reported the following information to Snohomish County in 2013 to demonstrate compliance with the minimum educational service standards:

LOS Standard	MINIMUM LOS# Elementary	CURRENT LOS Elementary	MINIMUM LOS Middle	CURRENT LOS Middle	MINIMUM LOS High	CURRENT LOS High
*Snohomish No. 203	35	24.44	35	27.0	40	32.0

\*The District determines these figures by taking the sum of all students in regular classrooms at a grade level and dividing that by the number of teaching stations at that grade level.

### 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.

#### Schools

The District currently has ten (10) elementary schools (one grades K-2, one grades 3-6 and eight grades K-6), two (2) middle schools (grades 7-8), and two high schools (grades 9-12). Machias and Riverview Elementary Schools and Valley View and Centennial Middle Schools were recently renovated and expanded. The District has an additional facility, the Maple Avenue Campus (the former "Freshman Campus"), which was used as interim capacity to accommodate the District's renovation program but is being mostly demolished and replaced by the Aquatic Center.

School capacity is based on the number of teaching stations within each building and the space requirements of the District's adopted educational program. The school capacity inventory is summarized in Tables 1, 2, and 3.

**Table 1  
Elementary School Capacity Inventory**

Elementary School	Site Size (acres)	Bldg Area (Sq. Ft.)	Teaching Stations(1)	Permanent Capacity (2)	Capacity with Portables	Year Built or Last Remodel	Potential for Expansion of Perm. Facility (3)
Cascade View	10.5	45,629	17	391	437	1990	yes
Cathcart	13.0	36,231	18	414	460	1994	yes
Central Primary	4.0	45,239	16	374	424	1994	yes
Dutch Hill	15.0	40,038	19	437	483	1985	yes
Emerson	7.9	38,389	20	460	506	1989	yes
Little Cedars	11.4	79,231	27	621	713	2007	yes
Machias	9.7	82,050	26	600	600	2011	yes
Riverview	9.6	84,114	26	600	600	2011	no
Seattle Hill	10.0	42,357	19	437	529	1982	yes
Totem Falls	10.0	44,877	18	483	575	1991	yes
<b>Total</b>		<b>520,471</b>		<b>4,817</b>	<b>5,327</b>		

(1) The number of teaching stations includes stations used for teacher planning periods. Therefore, the permanent capacity figure is adjusted to reflect that a teaching station may only be used for regular student instruction for a portion of the total school day.

(2) Permanent Student Capacity figure is exclusive of Portables and is based on target class sizes.

(3) Potential for expansion is based on the size of existing site and assumes that the District could obtain land use approvals/permits for such expansion. The analysis does not take into consideration the possibility of acquiring adjacent property.



**Table 2  
Middle School Capacity Inventory**

Middle School	Site Size (acres)	Bldg Area (Sq. Ft.)	Teaching Stations(1)	Permanent Capacity (2)	Capacity with Portables	Year Built or Last Remodel	Potential for Expansion of Perm. Facility (3)
Centennial	21.0	123,744	36	900	900	2011	yes
Valley View	36.0	168,725	38	950	950	2012	yes
<b>Total</b>		<b>290,718</b>		<b>1,850</b>	<b>1,850</b>		

(1) The number of teaching stations includes stations used for teacher planning periods. Therefore, the permanent capacity figure is adjusted to reflect that each teaching station is only used for regular student instruction for a portion of the total school day.

(2) Permanent Student Capacity figure is exclusive of Portables.

(3) Potential for expansion is based on the size of existing site and assumes that the District could obtain land use approvals/permits for such expansion. The analysis does not take into consideration the possibility of acquiring adjacent property.

**Table 3  
High School Capacity Inventory**

High School	Site Size (acres)	Bldg Area (Sq. Ft.)	Teaching Stations (1)	Permanent Capacity (2)	Capacity with Portables	Year Built or Last Remodel	Potential for Expansion of Perm. Facility (3)
Snohomish H.S.	30.0	270,089	73	1,800	1800	2012	No
Glacier Peak H.S.	52.0	245,229	68	1,500	1,590	2008	Yes
AIM Alternative(4)	3.25	13,873		100	100	2008	No
<b>Total</b>		<b>521,661</b>		<b>3,400</b>	<b>3,490</b>		

(1) The number of teaching stations includes stations used for teacher planning periods. Therefore, the permanent capacity figure is adjusted to reflect that each teaching station is only used for regular student instruction for a portion of the total school day.

(2) Permanent Student Capacity figure is exclusive of Portables.

(3) Potential for expansion is based on the size of existing site and assumes that the District could obtain land use approvals/permits for such expansion. The analysis does not take into consideration the possibility of acquiring adjacent property.

(4) Note that the AIM Alternative High School is housed in the larger Parkway Facility. The Parkway Facility has both programmatic and non-programmatic uses including the Parent Partnership Program, transition programs, and the District's Capital Projects Department. The information here is specific to the AIM Alternative High School and not the entire Parkway Facility.

## Portables

Portables are used as interim classroom space to house students until permanent classroom facilities can be provided and to prevent overbuilding. Portables are not a solution for housing students on a permanent basis. The District currently uses 59 portables at various sites throughout the District. The number of portables and their capacities are summarized in Table 4.

Table 4  
Portables\*

School Name	Portables Classrooms	Portables Other	Capacity
<b>ELEMENTARY:</b>			
Cascade View	3	2	69
Cathcart	2	5	46
Central Primary	0	2	0
Dutch Hill	4	2	92
Emerson		2	0
Machias	0		0
Riverview	0		0
Seattle Hill	6	7	138
Totem Falls	4	6	92
Little Cedars	4	2	92
<b>Total</b>	<b>23</b>	<b>28</b>	<b>529</b>
<b>MIDDLE:</b>			
Centennial	0	2	0
Valley View	0	0	0
<b>Total</b>	<b>0</b>	<b>2</b>	<b>0</b>
<b>HIGH</b>			
Snohomish	0	0	0
Glacier Peak	6	0	180
<b>Total</b>	<b>6</b>	<b>0</b>	<b>180</b>
<b>GRAND TOTAL</b>	<b>29</b>	<b>30</b>	<b>709</b>

*Each portable  
classroom is 910 square feet.*

## Support Facilities

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

**Table 5**  
**Support Facilities**

<b>Facility Name</b>	<b>Building Area (Sq. Ft.)</b>	<b>Site Size (Acres)</b>
Operations Center	15,073	5.16
Resource and Service Center	22,296	6.02
Parkway Campus	9,536*	3.25
District Warehouse	3,936	**
Aquatic Center	53,200	21.0

*\*Does not include education-related square footage.*

*\*\*Located on the same site as Cathcart Elementary School.*

## Land

The District currently owns three undeveloped sites. The District owns 17 acres in the Three Lakes area that could potentially be used as an elementary school site in the future (assuming that land use approvals/permits could be obtained); however that property does have some notable wetland concerns that are likely to limit potential use. The District also owns an additional 20 acres behind Valley View Middle School. The 20 acre site has topography concerns and accessibility issues that could limit the District's ability to use the property as an additional school site. The third site is located in the Clearview area and is 1.54 acres in size. This site is too small for any educational use and the site is currently leased out.

## Leased Facilities

The District currently does not lease any facilities. However, the District does lease out the Clearview property (see above).

## **SECTION 4: STUDENT ENROLLMENT**

### **Historical Trends**

Student enrollment in the District remained relatively constant between 1973 and 1983 and increased steadily between 1984 and 1997. The growth in student enrollment leveled out in 1998 and dipped a little in 1999. Student enrollment in the years 2006 through 2013 reflects a continuation in growth. Overall, District enrollment grew by 5.6% during that time period. The District anticipates, based upon projections from OFM and OSPI population projections, that future enrollments will level off over the next six year period.

The October 1, 2013 FTE enrollment was 9,563. 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 Snohomish 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 projection.

### **Six Year Enrollment Projections**

The District has developed its own methodology for forecasting future enrollments. This methodology, a modified cohort survival method, considers the cumulative effect of the historic enrollment trends and the projected residential development within the District. The District methodology uses the cohort projections developed by the Office of the Superintendent of Public Instruction as a baseline and then applies a growth factor for each year through 2021. *See Appendix A.* The average growth factor applied for the six year period of this Plan is 0.51% of enrollment growth per year. This growth factor was determined using an analysis of historic average housing development in the District and past enrollment growth within the last six years, knowledge of active known and proposed future housing developments, and an assessment of the most recent amendments to the Snohomish County Comprehensive Plan.

Using the modified cohort survival projections, a total enrollment of 9,603 (FTE) is expected in 2019. In other words, the District expects the enrollment of 40 additional students between 2013 and 2019. *See Table 6.*

OFM population-based enrollment projections were estimated for the District using OFM population forecasts for the County.<sup>3</sup> Between 2000 and 2013, the District's enrollment constituted approximately 18.35% of the District's total population. Assuming that, between 2014 and 2019, the District's enrollment will continue to constitute 18.35% of the District's population, using OFM/County data, the District projects a total enrollment of 10,327 students in 2019. *See Table 6.*

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<sup>3</sup> The District is using Alternative #2 of the County's 2035 GMA Population Forecast since it contains the high end of potential growth. This alternative provides the District with an outside measure of growth.

Table 6									
Comparison of Student Enrollment FTE Projections 2013-2019									
Projection	October 2013*	2014	2015	2016	2017	2018	2019	Projected Change 2013-2019	Percent Change 2013-2019
County/OFM**	9,563	9,690	9,817	9,944	10,071	10,198	10,327	764	7.99%
District	9,563	9,622	9,631	9,640	9,522	9,588	9,603	40	0.42%
Total Population Projection for District (OFM)							56,276		
Student to Population Ratio	18.35%								

\*Actual Oct 2013 FTE

\*\*Based on 2035 GMA Population Forecasts by School District, Alternative #2 for the Snohomish County GMA Comprehensive Plan update in 2015.

The District uses the modified cohort survival projections for purposes of predicting enrollment during the six years of this Plan. As noted above, the growth factor used in the modified cohort survival projections reflects an analysis of historic average housing development and enrollment in the District within the last six years and knowledge of active known and proposed future housing developments. The District believes this projection to be an accurate measure of future growth given that it is based upon actual circumstances within the District. The District will monitor actual enrollment over the next two years and, if necessary, make appropriate adjustments in the next Plan update.

### 2035 Enrollment Projections

Student enrollment projections beyond the 2019 school year are highly speculative. Using OFM/County data as a base, the District projects a 2035 student population of 11,935. This assumes that the District's enrollment will continue to constitute 18.35% of the District's total population through 2035.

The total enrollment estimate was broken down by grade span to evaluate long-term needs for capital facilities. Again, these estimates are highly speculative and are used only for general planning purposes.

**Table 7**  
**Projected Student Enrollment**  
**2035**

Grade Span	FTE Enrollment – October 2013	Projected Enrollment 2035**
Elementary (K-6)	4,476	5,586
Middle School (7-8)	1,575	1,966
High School (9-12)	3,512	4,383
<b>TOTAL (K-12)</b>	<b>9,563</b>	<b>11,935</b>

Note: Snohomish County Planning and Development Services provided the underlying data for the 2035 projections.

\*\*The 2035 enrollment projections assume that the percentage of students per grade level will remain consistent between 2014 and 2035.

## SECTION 5: CAPITAL FACILITIES NEEDS

### Facility Needs (2014-2019)

#### Schools

The projected available student capacity was determined by subtracting projected FTE student enrollment from permanent school capacity (i.e. excluding portables) for each of the six years in the forecast period (2014-2019).

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 (see Table 11).

Projected future capacity needs are depicted on Table 9-A and are derived by applying the District’s modified cohort projected enrollment to the capacity existing in 2013. This table shows actual space needs and the portion of those needs that are “growth related” for the years 2014-2019.

Table 9-A  
Additional Capacity Needs  
2014-2019

Grade Span	2013*	2014	2015	2016	2017	2018	2019	Pct. Growth Related
<b>Elementary (K-6)</b>								
Total	---**	---	---	---	---	---	---	
Growth Related	--	--	--	--	--	--	--	--%
<b>Middle School (7-8)</b>								
Total	---**	---	---	---	---	---	---	
Growth Related	--	--	--	--	--	--	--	--%
<b>High School</b>								
Total	112**	180	202	200	128	175	242	
Growth Related	--	68	90	88	16	63	130	54%

\* Actual 2013 FTE Enrollment

\*\*Represents deficiencies existing as of the date of this Plan.

The capacity improvements that are required to meet the District’s growth-related and non-growth related capacity needs are identified in Table 9-B below.

By the end of the six-year forecast period (2019-2020), additional permanent classroom capacity will be needed as follows:

**Table 9-B**  
**Estimated Unhoused Students (2019-2020)\***

<b>Grade Span</b>	<b>Unhoused Students (Growth Related)</b>	<b>Unhoused Students (Non-Growth Related)</b>
Elementary (K-6)	--	--
Middle School (7-8)	--	--
High School (9-12)	130	112
<b>TOTAL UNHOUSED (K-12)</b>	130	112

\*Reflects needs assuming no construction projects

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 in Table 9-B.

### **Planned and Funded Improvements**

To accommodate growth, the District constructed a new elementary school that opened in the fall of 2007 and constructed a second high school, Glacier Peak, which opened in the fall of 2008. The District’s voters approved a bond in May 2004 for these projects. In 2008, the District’s voters approved additional construction bonds to replace and expand Machias and Riverview elementary schools to address the need for elementary student capacity. The 2008 Bond also provided for finishing the renovation of Snohomish High School, enlarging and modernizing Valley View Middle School and enlarging Centennial Middle School, and building a new aquatics center. The District also purchased an existing building, the “Parkway Building”, and renovated one-half of it to house its AIM Alternative High School and Transition programs and the Parent Partnership Program. In the future, the District may seek voter approval for the construction of Elementary # 11. However, this is not expected to occur within the six year planning period.

At the present time, the District does not intend to construct new permanent capacity during the six-year planning period. The District likely will purchase and site new portable facilities to address capacity needs. The District intends to monitor closely enrollment and capacity needs and will update the CFP in the future as appropriate.



## **Elementary Schools**

The District recently opened Little Cedars Elementary School with a permanent capacity of 621, with 27 teaching stations. The elementary was completed and put into use for the 2007-08 school year. The total cost of the new elementary school was approximately \$25.0 million excluding the land purchase.

In addition, the District requested as a component of its 2008 bond proposal to replace and expand two elementary schools, Machias and Riverview. The projects were just recently completed and the capacity of the two schools was expanded from 437 and 483 respectively to 600 each. These schools opened at the new capacity in January of 2011.

## **Middle Schools**

To address overcrowding at the middle school level, the District modernized and enlarged Valley View Middle School to house 950 students and Centennial Middle School to house 900 students. Centennial opened in 2011 and Valley View opened in the fall of 2012.

## **High Schools**

The District opened Glacier Peak High School, with a capacity of 1,500 students in fall of 2008. In addition, the District recently completed modernization of the existing Snohomish High School campus.

In the summer of 2012 added three portables (total of six classrooms) at Glacier Peak.

## **Interim Classroom Facilities**

The District will purchase portables as needed (See Table 10).

As necessary, the District will also continue to utilize portables as temporary housing of students until permanent facilities are constructed. However, it remains a District goal to house all students in permanent facilities.

## **SECTION 6: CAPITAL FACILITIES FINANCING**

Funding of school facilities is typically secured from a number of sources including voter-approved bonds, State matching funds and development impact 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 approve the issuance of bonds. Bonds are then retired through collection of property taxes. Snohomish School District voters rejected a bond proposal in 2001 for \$14.5 million to finance the acquisition of sites, planning for a new elementary school, planning for a new high school, the acquisition of modular classrooms, and the purchase and installation of technology equipment and systems.

Voters in May of 1998 approved a \$3.9 million bond issue to construct 11 classrooms at Snohomish High School and to finance mechanical and technology improvements throughout the District. On March 14, 2000, Snohomish School District voters approved a \$6.12 million dollar bond issue to finance certain capital improvements to the District's educational facilities. A Study and Survey has been completed and will assist in identifying future facility needs and improvements.

In March of 2003, the school board appointed a 35-member Citizens' Facilities Advisory Committee to complete an in-depth study of our school facilities. This committee found that Snohomish schools are overcrowded and reported that half of our school buildings are at or near the end of their useful life. The committee then created a long-range plan for school construction, modernization and renovation to address those issues.

The District's voters approved a \$141,570,000 bond issue on May 18, 2004, to fund a new high school, modernization of the existing Snohomish High School, a new elementary school, acquisition of two new school sites, and various health, safety, energy and infrastructure improvements throughout the District.

The District's voters approved a \$261.6 million bond in May 2008 to fund the renovation of Snohomish High School, the renovation/expansion of Valley View Middle School, the expansion of Centennial Middle School, the replacement/expansion of Machias and Riverview elementary schools, construction of a new aquatics center, to make District-wide capital improvements, and acquire classroom technology to improve student learning.

### **State School Construction Assistance**

State School Construction Assistance funding comes 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 School Construction Assistance funds for

specific capital projects based on a prioritization system. The District is eligible for State School Construction Assistance funds for new schools at the 60.62% percentage level.

### **Impact Fees**

Development 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 additional discussion in Section 7).

### **Six Year Financing Plan**

The Six-Year Financing Plan shown in Table 10 demonstrates how the District intends to fund new construction and improvements to school facilities for the years 2014-2019. The financing components includes bond issues, impact fees, and State School Construction Assistance 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.

The District's six year finance plan is outlined in Table 10 below.

As previously stated, with the exception of portable purchases, the District currently does not plan to construct new capacity projects within the six-year planning period.

Table 10  
Capital Facilities Plan 2014-2019

Estimated Project Cost by Year - \$ in millions							Total Cost	Secured Bond/Lavy/Impact Fee	Secured Other	Unsecured Future	Projected State Match
2014*	2015	2016	2017	2018	2019						
<b>Improvements Adding Student Capacity (in thousands)</b>											
Elementary Schools							\$ -	\$ -	\$ -	\$ -	\$ -
Machias Expansion							\$ -	\$ -	\$ -	\$ -	\$ -
Riverview Expansion							\$ -	\$ -	\$ -	\$ -	\$ -
Middle Schools							\$ -	\$ -	\$ -	\$ -	\$ -
Valley View Expansion	\$ 521,000						\$ 521,000	\$ 521,000	\$ -	\$ -	\$ -
Centennial Expansion	\$ 59,000						\$ 59,000	\$ 59,000	\$ -	\$ -	\$ -
High Schools							\$ -	\$ -	\$ -	\$ -	\$ -
<b>TOTALS</b>	<b>\$ 580,000</b>	<b>\$ -</b>	<b>\$ -</b>	<b>\$ -</b>	<b>\$ -</b>	<b>\$ -</b>	<b>\$ 580,000</b>	<b>\$ 580,000</b>	<b>\$ -</b>	<b>\$ -</b>	<b>\$ -</b>
Estimated Project Cost by Year - \$ in millions							Total Cost	Secured Bond/Lavy	Secured Other	Unsecured Future	Projected State Match
2014*	2015	2016	2017	2018	2019						
<b>Improvements NOT Adding Student Capacity (in thousands)</b>											
Elementary Schools							\$ -	\$ -	\$ -	\$ -	\$ -
Machias Replacement(N/L)							\$ -	\$ -	\$ -	\$ -	\$ -
Riverview Replacement (N/L)	\$ 1,000	\$ 250,000					\$ 251,000	\$ 251,000	\$ -	\$ -	\$ -
Middle Schools							\$ -	\$ -	\$ -	\$ -	\$ -
Valley View Modernization							\$ -	\$ -	\$ -	\$ -	\$ -
Centennial Modernization							\$ -	\$ -	\$ -	\$ -	\$ -
High Schools							\$ -	\$ -	\$ -	\$ -	\$ -
Snohomish High School Renovation I	\$ 41,000						\$ 41,000	\$ 41,000	\$ -	\$ -	\$ -
Other							\$ -	\$ -	\$ -	\$ -	\$ -
New Community Aquatic Facility	\$ 1,538,000	\$ 20,000					\$ 1,558,000	\$ 1,558,000	\$ -	\$ -	\$ -
Portables							\$ -	\$ -	\$ -	\$ -	\$ -
District-wide Capital Improvements	\$ 602,000	\$ 1,030,000	\$ 900,000	\$ 1,000,000	\$ 750,000	\$ 750,000	\$ 5,032,000	\$ 5,032,000	\$ -	\$ -	\$ -
Technology to Improve Student Learning	\$ 7,000	\$ 3,200,000	\$ 3,400,000	\$ 3,600,000	\$ 3,825,000	\$ 3,800,000	\$ 17,832,000	\$ 17,832,000	\$ -	\$ -	\$ -
<b>TOTALS</b>	<b>\$ 2,189,000</b>	<b>\$ 4,500,000</b>	<b>\$ 4,300,000</b>	<b>\$ 4,600,000</b>	<b>\$ 4,575,000</b>	<b>\$ 4,550,000</b>	<b>\$ 24,714,000</b>	<b>\$ 24,714,000</b>	<b>\$ -</b>	<b>\$ -</b>	<b>\$ -</b>

\*Includes total project costs for projects, some of which has been previously expended.

**Table 11**  
**Projected Student Capacity**  
**2014-2019**  
**(After Programmed Improvements)**

**Elementary School Surplus/Deficiency**

	2014	2015	2016	2017	2018	2019
Existing Capacity <sup>1</sup>	4,817	4,817	4,817	4,817	4,817	4,817
Added Capacity						
Enrollment <sup>2</sup>	4,540	4,475	4,461	4,411	4,466	4,428
Surplus (Deficiency)	279	342	356	406	351	389

**Middle School Surplus/Deficiency**

	2014	2015	2016	2017	2018	2019
Existing Capacity	1,850*	1,850	1,850	1,850	1,850	1,850
Added Capacity						
Enrollment	1,503	1,555	1,579	1,583	1,547	1,534
Surplus (Deficiency)	347	295	271	267	303	316

\*Includes recent capacity additions at Valley View (2012) and Centennial (2011) Middle Schools.

**High School Surplus/Deficiency**

	2014	2015	2016	2017	2018	2019
Existing Capacity*	3,400	3,400	3,400	3,400	3,400	3,400
Added Capacity						
Enrollment	3,580	3,602	3,600	3,528	3,575	3,642
Surplus (Deficiency)	(180)	(202)	(200)	(128)	(175)	(242)

<sup>1</sup> Does not include temporary (portable) capacity

<sup>2</sup> See Appendix A for complete breakdown of enrollment projections

## **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.

### **School Impact Fees in Snohomish County**

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, 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: single family; multi-family/studio or 1-bedroom; and multi-family/2-bedroom or more.

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.

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

Impact fees are 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 are 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 costs of projects that do not add capacity are not included in the impact fee calculations. Furthermore, because the impact fee formula calculates a “cost per dwelling unit”, an identical fee is generated regardless of whether the total new capacity project costs are used in the calculation or whether

the District only uses the percentage of the total new capacity project costs allocated to the Districts growth-related needs. Furthermore, impact fees will not be used to address existing deficiencies.

The District is not requesting the collection of impact fees in 2014-15. See discussion in Section 5 above. The District may request impact fees in future updates to the Capital Facilities Plan.

**Table 12**  
**School Impact Fees**  
**2014**

<b>Housing Type</b>	<b>Impact Fee Per Dwelling Unit</b>
Single Family	\$0
Multi-Family (1 Bedroom)	\$0
Multi-Family (2+ Bedroom)	\$0

APPENDIX A

POPULATION AND ENROLLMENT DATA



**Table A-1**

**HISTORICAL STUDENT ENROLLMENT 2006-2013  
ACTUAL ENROLLMENTS ON OCTOBER 1st\***

GRADES	2006	2007	2008	2009	2010	2011	2012	2013
K	303	303	332	291	314	287	310	305
1 <sup>st</sup> Grade	678	644	622	704	618	674	593	671
2 <sup>nd</sup> Grade	716	695	668	644	719	651	697	620
3 <sup>rd</sup> Grade	694	724	713	684	651	735	665	728
4 <sup>th</sup> Grade	739	723	739	736	718	683	738	694
5 <sup>th</sup> Grade	716	745	732	755	731	708	705	760
6 <sup>th</sup> Grade	728	734	775	761	776	763	733	698
7 <sup>th</sup> Grade	780	733	743	807	771	803	792	759
8 <sup>th</sup> Grade	806	787	755	764	800	769	819	816
9 <sup>th</sup> Grade	782	804	822	835	870	903	848	921
10 <sup>th</sup> Grade	771	813	835	902	841	862	919	884
11 <sup>th</sup> Grade	709	734	789	859	888	855	833	899
12 <sup>th</sup> Grade	631	629	667	693	775	784	798	808
<b>Total Enrollment</b>	<b>9,052</b>	<b>9,068</b>	<b>9,192</b>	<b>9,436</b>	<b>9,462</b>	<b>9,477</b>	<b>9,445</b>	<b>9,563</b>

\* FTE enrollment.

**Table A-2**

**PROJECTED STUDENT ENROLLMENT (FTE) 2014-2019  
Based on Modified Cohort Survival\***

GRADES	ESTIMATE FTE 2014-2015	ESTIMATE FTE 2015-2016	ESTIMATE FTE 2016-2017	ESTIMATE FTE 2017-2018	ESTIMATE FTE 2018-2019	ESTIMATE FTE 2019-2020
K	302	294	291	300	295	296
1 <sup>st</sup> Grade	660	650	632	628	650	637
2 <sup>nd</sup> Grade	703	680	670	654	651	673
3 <sup>rd</sup> Grade	640	716	692	685	670	667
4 <sup>th</sup> Grade	758	661	740	719	712	696
5 <sup>th</sup> Grade	700	756	660	742	721	714
6 <sup>th</sup> Grade	777	718	777	681	766	744
<b>K-6 Total</b>	<b>4,540</b>	<b>4,475</b>	<b>4,461</b>	<b>4,411</b>	<b>4,466</b>	<b>4,428</b>
7 <sup>th</sup> Grade	729	814	753	816	715	805
8 <sup>th</sup> Grade	773	741	827	767	832	729
<b>6-8 Total</b>	<b>1,503</b>	<b>1,555</b>	<b>1,579</b>	<b>1,583</b>	<b>1,547</b>	<b>1,534</b>
9 <sup>th</sup> Grade	928	883	846	945	876	950
10 <sup>th</sup> Grade	962	971	923	885	988	916
11 <sup>th</sup> Grade	852	929	937	798	855	954
12 <sup>th</sup> Grade	838	818	893	900	856	821
<b>9-12 Total</b>	<b>3,580</b>	<b>3,602</b>	<b>3,600</b>	<b>3,528</b>	<b>3,575</b>	<b>3,642</b>
<b>Total Enrollment</b>	<b>9,622</b>	<b>9,631</b>	<b>9,640</b>	<b>9,522</b>	<b>9,588</b>	<b>9,603</b>

\*See Section 4 for further details.

<b>Enrollment by Grade Span**</b>	<b>2013*</b>	<b>2014</b>	<b>2015</b>	<b>2016</b>	<b>2017</b>	<b>2018</b>	<b>2019</b>
Elementary (K-6)	4,476	4,540	4,475	4,461	4,411	4,466	4,428
Middle School (7-8)	1,574	1,503	1,555	1,579	1,583	1,547	1,534
High School (9-12)	3,512	3,580	3,602	3,600	3,528	3,575	3,642
<b>TOTAL</b>	<b>9,562</b>	<b>9,622</b>	<b>9,631</b>	<b>9,640</b>	<b>9,522</b>	<b>9,588</b>	<b>9,603</b>

<b>Percentage by Grade Span</b>	<b>2013</b>	<b>2014</b>	<b>2015</b>	<b>2016</b>	<b>2017</b>	<b>2018</b>	<b>2019</b>
Elementary (K-6)	47%	47%	46%	46%	46%	47%	46%
Middle School (78)	16%	16%	16%	16%	17%	16%	16%
High School (9-12)	37%	37%	37%	37%	37%	37%	38%
<b>TOTAL**</b>	<b>100%</b>	<b>100%</b>	<b>100%</b>	<b>100%</b>	<b>100%</b>	<b>100%</b>	<b>100.%</b>

\*Actual October 2013 FTE Student Population

\*\*FTE Student Population

**AVERAGE PERCENTAGE ENROLLMENT BY GRADE SPAN**  
(COUNTY/OFM Enrollment Projections)  
Applying Above Percentages

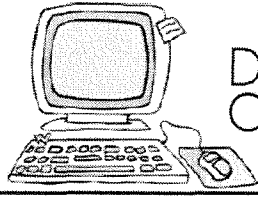
<b>Enrollment by Grade Span</b>	<b>2013*</b>	<b>2014</b>	<b>2015</b>	<b>2016</b>	<b>2017</b>	<b>2018</b>	<b>2017</b>
Elementary (K-6)	4,476	4,554	4,516	4,574	4,633	4,793	4,750
Middle School (7-8)	1,574	1,550	1,571	1,591	1,712	1,632	1,652
High School (9-12)	3,512	3,585	3,632	3,679	3,726	3,773	3,924
<b>TOTAL**</b>	<b>9,562</b>	<b>9,690</b>	<b>9,817</b>	<b>9,944</b>	<b>10,071</b>	<b>10,198</b>	<b>10,327</b>

\*Actual October 2011 FTE Student Enrollment.

\*\* Totals may vary due to rounding.

APPENDIX B

STUDENT GENERATION FACTOR REVIEW



DOYLE  
CONSULTING

ENABLING SCHOOL DISTRICTS TO MANAGE AND USE STUDENT ASSESSMENT DATA

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## Student Generation Rate Study for the Snohomish School District

2/26/2014

This document describes the methodology used to calculate student generation rates (SGRs) for the Snohomish School District, and provides results of the calculations.

SGRs were calculated for two types of residential construction: Single family detached, and multi-family with 2 or more bedrooms. Attached condominiums, townhouses and duplexes are included in the multi-family classification since they are not considered "detached". Manufactured homes on owned land are included in the single family classification.

1. Electronic records were obtained from the Snohomish County Assessor's Office containing data on all new construction within the Snohomish School District from January 2006 through December 2012. As compiled by the County Assessor's Office, this data included the address, building size, assessed value, and year built for new single and multi-family construction. The data was "cleaned up" by eliminating records which did not contain sufficient information to generate a match with the District's student record data (i.e. incomplete addresses).
2. The District downloaded student records data into Microsoft Excel format. This data included the addresses and grade levels of all K-12 students attending the Snohomish School District as of February 2014. Before proceeding, this data was reformatted and abbreviations were modified as required to provide consistency with the County Assessor's data.

3. **Single Family Rates:** The data on all new single family detached residential units in County Assessor's data were compared with the District's student record data, and the number of students at each grade level living in those units was determined. The records of 1,367 single family detached units were compared with data on 10,107 students registered in the District, and the following matches were found by grade level(s)\*:

GRADE(S)	COUNT OF MATCHES	CALCULATED RATE
K	65	0.048
1	71	0.052
2	59	0.043
3	66	0.048
4	77	0.056
5	75	0.055
6	49	0.036
7	72	0.053
8	70	0.051
9	73	0.053
10	73	0.053
11	71	0.052
12	62	0.045
K-6	462	0.338
7-8	142	0.104
9-12	279	0.204
K-12	883	0.646

4. *Large Multi-Family Developments:* Snohomish County Assessor's data does not specifically indicate the number of units or bedrooms contained in large multi-family developments. Additional research was performed to obtain this information from specific parcel ID searches, and information provided by building management, when available. Information obtained included the number of 0-1 bedroom units, the number of 2+ bedroom units, and specific addresses of 0-1 bedroom units. If specific addresses or unit numbers of 0-1 bedroom units were not provided by building management, the assumption of matches being 2+ bedroom units was made. This assumption is supported by previous SGR studies.

*Small Multi-Family Developments:* This method included all developments in the County Assessor's data containing four-plexes, tri-plexes, duplexes, condominiums and townhouses. This data contained information on the number of bedrooms for all townhouses and condominiums. Specific parcel ID searches were performed for duplex and larger units in cases where number of bedroom data was missing.

5. **Multi-Family 2+ BR Rates:** The multi-family 2+ BR SGR's were calculated by comparing data on 2+ BR multi-family units with the District's student record data, and the number of students at each grade level living in those units was determined. The records of 102 multi-family 2+ BR units were compared with data on 10,107 students registered in the District, and the following matches were found by grade level(s)\*:

GRADE(S)	COUNT OF MATCHES	CALCULATED RATE
K	1	0.010
1	1	0.010
2	0	0.000
3	3	0.029
4	1	0.010
5	2	0.020
6	0	0.000
7	1	0.010
8	1	0.010
9	2	0.020
10	2	0.020
11	2	0.020
12	2	0.020
K-6	8	0.078
7-8	2	0.020
9-12	8	0.078
K-12	18	0.176

6. **Multi-Family 0-1 BR Rates:** Research indicated that 20 multi-family 0-1 BR units were constructed within District boundaries during the time period covered by this study. These units were compared with the data on 9,970 students registered in the District. No specific unit number matches were made.
7. **Summary of Student Generation Rates\*:**

	K-6	7-8	9-12	K-12
Single Family	.338	.104	.204	.646
Multi-Family 2+ BR	.078	.020	.078	.176

\*Calculated rates for grade level groups may not equal the sum of individual grade rates due to rounding.

Sultan School District # 311

**Capital Facilities  
Plan**

*2014 – 2019*

DRAFT: June 20, 2014



**Sultan School District No. 311  
Capital Facilities Plan  
2014-2019**

For Inclusion in the  
**Snohomish County Comprehensive Plan**

**BOARD OF DIRECTORS**

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For information on the Sultan School District Facilities  
Plan contact the Superintendent's Office (360) 793-9801

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# **Section 1: Introduction**

## ***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 Sultan School District (the “District”) has prepared this Capital Facilities Plan (the “CFP”) to provide Snohomish County (the “County”), the City of Sultan (“Sultan”) and the City of Gold Bar (“Gold Bar”) with an overview of projected student enrollment, site capacity, a description of facilities needed to accommodate projected student enrollment, and a schedule and financing program for capital improvements over the next six years (2014-2019).

In accordance with the Growth Management Act, adopted County Policy and the Snohomish County Ordinance Nos. 97-095 and 99-107, the 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. The plan must also include a description of education standards and a clearly defined minimum level of service.
- ❖ A forecast of 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 that 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 (if applicable).

In developing this CFP, the guidelines of Appendix F of the General Policy Plan were used as follows:

- ❖ Information was 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 is to be consistent with the State Office of Financial Management (“OFM”) population forecasts and those of Snohomish County. Ordinance 97-095 and 99-107 require that student generation rates, as applicable, be independently calculated by each school district.

- ❖ The CFP complies with Chapter 36.70A RCW (the Growth Management Act) and, where impact fees are to be assessed, Chapter 82.02 RCW.
- ❖ The calculation methodology for impact fees meets the conditions and tests of Chapter 82.02 RCW. Districts which propose the use of impact fees should identify in future plan updates alternative funding sources in the event that impact fees are not available due to action by the state, county or the cities within their district boundaries.
- ❖ The calculation methodology for impact fees, if proposed by the District, also complies with the criteria and the formulas established by the County and the City.

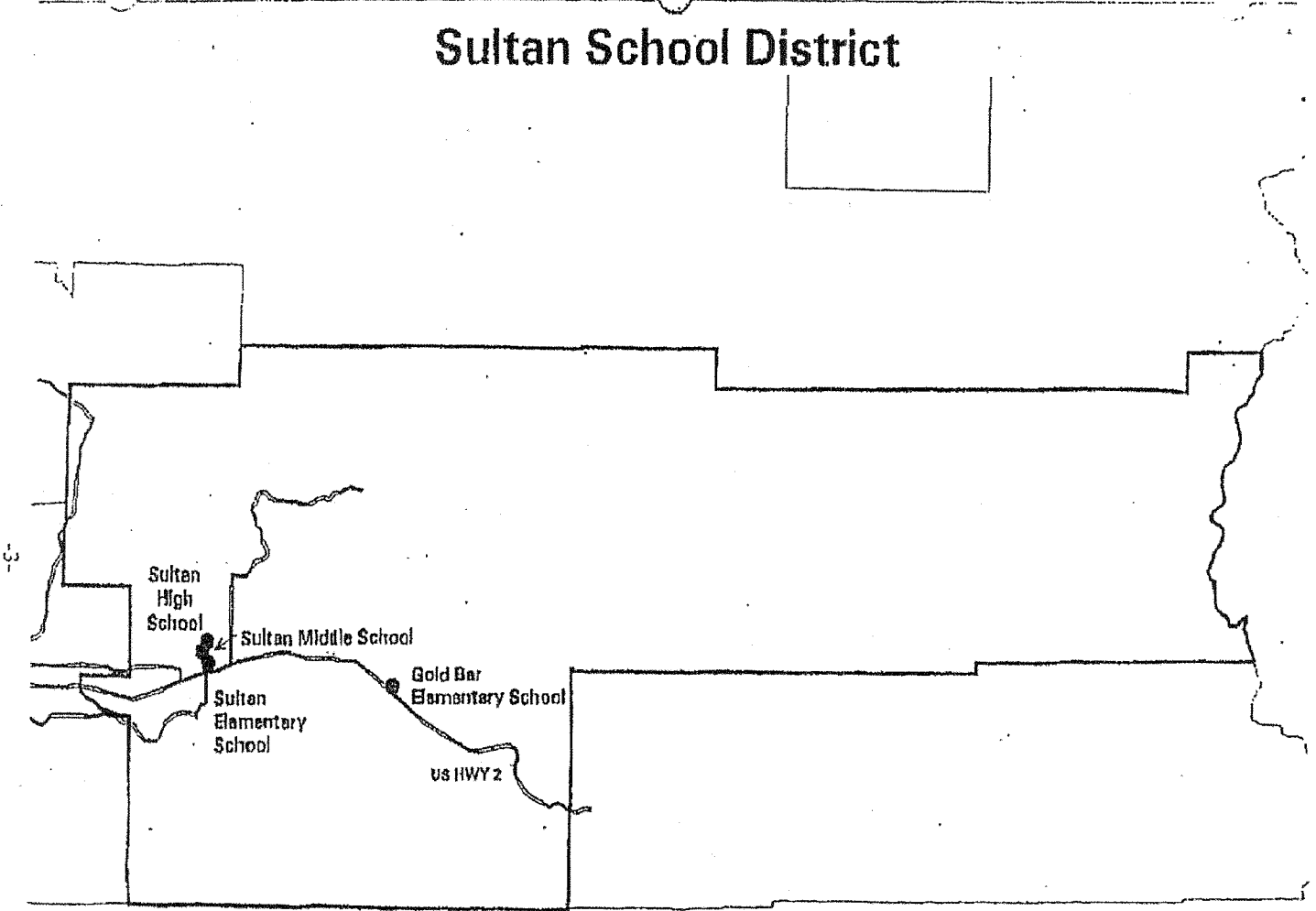
The County Council, on November 17, 1997, adopted Ordinance 97-095 that establishes the specific criteria for CFP adoption and for the assessment of mitigation fees. Section 3 of the Ordinance defines the requirements for the biennial CFP updates. Table 1 of the Ordinance outlines the formulae for determination of impact fees. This CFP has been drafted in accordance with Ordinance 97-095 and 99-107.

Unless otherwise noted, all enrollment and student capacity data in this CFP is expressed in terms of FTE (Full Time Equivalent).

### ***Overview of the Sultan School District***

The Sultan School District has two elementary schools (grades K-5), one middle school (grades 6-8), one high school (grades 9-12) and an Alternative Program (grades K-12). The District serves a student population of approximately 1,692 (October 1, 2013 FTE) in kindergarten through twelfth grade, includes the cities of Sultan and Gold Bar as well as unincorporated rural areas of Snohomish County, and has an estimated population of 13,159 residents (Snohomish County 2035 GMA Population Forecast by School District). The District is located 47 miles northeast of Seattle, Washington nestled in the foothills of the Cascade Mountain range.

# Sultan School District



-3-



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## Section 2: Definitions

Note: Where definitions are contained within Ordinance 97-095 and 99-107, the Ordinance definition is used (\*). In some cases, further clarification has been provided:

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

**\*Average Assessed Value** means the average assessed value by dwelling unit type of all residential units constructed within the district.

**Board** means the Board of Directors of the Sultan School District No. 311 (“School Board”).

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

**\*Capital Facilities** means school facilities identified in the District’s capital facilities plan and are “system improvements” as defined by the GMA as opposed to localized “project improvements”.

**\*Capital Facilities Plan (CFP)** means the 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 and Appendix F of the General Policy Plan. The definition refers to this document.

**\*Council** means the Snohomish County Council.

**\*County** means Snohomish County.

**DCTED** Dept. of Commerce

**\*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 of 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 that 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 Sultan School District No. 311.

**\*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 District's standard of service as determined by the District.

**FTE (Full Time Equivalent)** is a means of measuring student enrollment based on the number of hours per day in attendance at District schools. A student is considered one 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 Capital Facilities Plan, all other grades are considered to contain one FTE per student. The District has excluded those students enrolled in alternative learning experiences that do not require use of regular school capacity.

**GFA (per student)** means the Gross Floor Area per student.

**\*Grade Span** means a category into which the District groups its grades of students (e.g., elementary, 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, 1<sup>st</sup> 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 Dwelling Unit** means more than one residential dwelling unit, attached and/or detached, residing on a single tax parcel.

**OFM** means Washington State Office of Financial Management.

**OSPI** means Washington State Office of the Superintendent of Public Instruction.

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

**Portables:** means factory-built structures, transportable in one or more sections, that are designed to be used as instructional spaces and are needed to prevent the overbuilding of school facilities, to meet the needs of service areas within the 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.

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

**\*Portable 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** means the State Environmental Policy Act.

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

**\*Standard of Service** means the standard adopted by the 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 portable 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 (SGR)]** means the number of students of each grade span (elementary, middle/jr. high, high school) that the District determines are typically generated by different dwelling unit types within the District. The 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 the District.

**Subdivision** means all small and large lot subdivisions as defined in Title 19 of the Snohomish County Code, and all short subdivisions as defined in Title 20, which are within the definition of "development" above.

**Teaching Station** means a facility space (classroom) specifically dedicated to implementing the District's educational program and capable of accommodating at any one time, at least a full class of up to 32 students. In addition to traditional classrooms, these spaces can



include computer labs, auditoriums, gymnasiums, music rooms and other special education and resource rooms.

**Unhoused Students** means students projected to be housed in classrooms where class size exceeds standards within the District and, if the District so specifies in the Capital Facilities Plan, students projected to be housed in portable classrooms.

**WAC** means the Washington Administrative Code.

2014-2019

## **Section 3: Minimum Level of Service**

Creating a quality educational environment is the first priority of the Sultan School District. School facility and student capacity needs are often dictated by the types and amounts of space required to accommodate the District's adopted minimum level of service (MLOS) for both facility use and educational program. The educational program standards that typically drive facility space needs include grade configuration, optimum facility size, class size, educational program offerings, classroom utilization and scheduling requirements, and use of portable classroom facilities.

### ***MLOS for Elementary School Facilities***

- Class size for grades K-3 will not exceed an average of 22 students per classroom.
- Class size for grades 4- 5 will not exceed an average of 28 students per classroom.

### ***District Goals for Elementary School Educational Programs***

- Educational programs will be provided in a single shift each day. The facility will be available after normal hours for extended learning opportunities for selected students.
- Educational programs will be provided on the traditional school year schedule.
- Special education for students may be provided in regular classes when inclusion is possible and in resource rooms or self-contained classrooms when this is the most appropriate option available.
- All students will be provided music and physical education in a separate classroom.
- All students will be housed in permanent facilities.
- Optimum design capacity for new elementary schools is 400 students. However, actual capacity of an individual school may vary depending on the educational program offered.

### ***MLOS for Secondary School Facilities***

- Class size for grades 6-8 will not exceed an average of 30 students per classroom (except PE and Music).
- Class size for grades 9-12 will not exceed an average of 32 students per classroom (except PE and Music).

### ***District Goals for Secondary School Educational Programs***

- Educational programs will be provided in a single shift each school day. The facility will be available after normal hours for extra-curricular activities and for extended learning opportunities for selected students.
- Educational programs will be provided on a traditional school year schedule.

- 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 workspace during planning periods, it is not possible to achieve 100% utilization of all regular teaching stations throughout the day. We have targeted a utilization rate of 81% for grades 6-12 and 90% for grades K-5. Therefore, classroom capacity should be adjusted to reflect the use of one period per day for the aforementioned needs.
- Special education for students may be provided in regular classes when inclusion is possible, in resource rooms (pullout model), or in self-contained classrooms when this is the most appropriate option available.
- All students will be housed in permanent facilities.
- Optimum design capacity for a new middle school is 540 students and for a new high school 700 students. However, actual capacity of an individual school may vary depending on the educational program(s) offered.
- Identified students will also be provided other nontraditional educational opportunities in classrooms designated as follows:

Vocational Classrooms (i.e. business, metal/wood shop, home-family life, STEM)

Program Specific Classrooms (e.g., music, drama, art, physical education, computer labs, study rooms, etc.)

### ***District Goals for District-wide Educational Programs***

Special programs offered by the District at specific school sites include:

- ❖ Sno-Isle Skills Center (cooperative vocational technical school)
- ❖ Special Educational classes for Birth-Three through high school
- ❖ Speech and Language Therapy
- ❖ Occupational Therapy
- ❖ Physical Therapy
- ❖ School Psychology
- ❖ Title I/LAP
- ❖ Bilingual Education
- ❖ Extended Day Kindergarten
- ❖ Running Start
- ❖ Preschool
- ❖ AVID
- ❖ STEM
- ❖ Project Lead the Way
- ❖ Drug and Alcohol Intervention
- ❖ Summer School
- ❖ Vocational and career education
- ❖ Music
- ❖ Physical education

- ❖ Multi-age classrooms
- ❖ Technology education
- ❖ Alternative High School

These special or nontraditional educational programs can have a significant impact on the available student capacity of school facilities. In addition to factors that affect the amount of space required, government mandates and community expectations may affect how classroom space is utilized.

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 as accommodations are made to facilitate the demands brought about by modifications to the educational program standards. These changes will also be reflected in future updates of this Capital Facilities Plan.

At the start of the 2007/2008 school year the District launched a pilot Alternative High School program to provide an opportunity for struggling students to work towards completing their high school diploma requirements. Beginning in 2014/2015 Sky Valley Options High School will merge with Columbia Virtual Academy, another alternative education program within the Sultan School District. This will leave one K-12 Alternative School in the school district. We will continue to lease classrooms off campus for this school thru 2014-2015. About 30 FTE will report to campus each day and about 170 FTE will be served remotely via online learning.

***Use of Portables***

Because of fluctuations in student population as a result of growth from new development and changing age demographics in different parts of the District, portables are used **ON A TEMPORARY BASIS** in most locations. Portables will not be added if the quality of education at the facility is deemed by the District to be compromised by either total school size, or impact upon core facilities such as lunch room/food services, restrooms, library space, hallways, or a severe reduction in playground area or parking area, etc.

***Reporting of MLOS***

The District reported the following information to Snohomish County in 2013 to demonstrate compliance with the minimum educational service standards:

LOS Standard	MINIMUM LOS# Elementary	CURRENT LOS Elementary	MINIMUM LOS Middle	CURRENT LOS Middle	MINIMUM LOS High	CURRENT LOS High
*Sultan School District	K-3 =22 G4-5 =28	K-3 =21 G4-5 =22	30	25	32	24

\*The District determines these figures by taking the sum of all students in regular classrooms at a grade level and dividing that by the number of teaching stations at that grade level.

\*The current negotiated agreement with certificated staff requires that secondary teachers get one student period for prep time. Elementary school teachers get an average of 45 minutes of prep time within the student day, 225

minutes total within the week. The middle school, which has a six period day, operates at 83.3% capacity. The high school, which has a six period day, operates at 82% capacity.

*2014-2019*

## Section 4: Capital Facilities Inventory

### ***CAPITAL FACILITIES***

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 or established levels of service.

This section provides an inventory of capital facilities owned and operated by the Sultan School District including schools, portables, unimproved land and support facilities. Leased facilities are also identified. School facility capacity was inventoried based on the space required to accommodate the District's adopted educational program standards (see Section 3).

### ***Schools***

The District operates two elementary schools, one middle school, one high school, and an alternative high school. Currently the elementary schools accommodate grades K-5, the middle school serves grades 6-8 and the high school and alternative high school provides for grades 9-12.

School capacity was determined based on the number of regular 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 Table 1.

**Table 1  
School Capacity Inventory**

<b>Elementary School</b>	<b>Site Size (Acres)</b>	<b>Building Area (Square Feet)</b>	<b>Teaching Stations</b>	<b>Permanent Capacity</b>
Sultan Elementary 501 Date Ave, Sultan	9.00	52,661	21	504
Gold Bar Elementary 419 Lewis Ave, Gold Bar	10.22	33,723	12	288
<b>TOTAL</b>	<b>19.22</b>	<b>86,384</b>	<b>33</b>	<b>792</b>

<b>Middle School</b>	<b>Site Size (Acres)</b>	<b>Building Area (Square Feet)</b>	<b>Teaching Stations</b>	<b>Permanent Capacity</b>
Sultan Middle School 301 High Ave, Sultan	9.4	66,912	21	630
<b>TOTAL</b>	<b>9.4</b>	<b>66,912</b>	<b>21</b>	<b>630</b>

<b>High School*</b>	<b>Site Size (Acres)</b>	<b>Building Area (Square Feet)</b>	<b>Teaching Stations</b>	<b>Permanent Capacity</b>
Sultan High School 13715 310 <sup>th</sup> Ave SE, Sultan	35.0	71,876	20	640
<b>TOTAL</b>	<b>35.0</b>	<b>71,876</b>	<b>20</b>	<b>640</b>

<b>*Alternative Program</b>	<b>Site Size (Acres)</b>	<b>Building Area (Square Feet)</b>	<b>Teaching Stations</b>	<b>Permanent Capacity</b>
Columbia Virtual Academy 211 6 <sup>th</sup> Street, Sultan	5.0	700	4	60
<b>TOTAL</b>	5.0	700	4	60

*\*The site for the alternative school program is leased space that includes 4 classrooms.*

### **Portable Classrooms**

Portable classrooms are used as interim classroom space to house students until funding can be secured to construct permanent classrooms. The Sultan School District currently uses 30 portable classrooms at various school sites throughout the District to provide the additional interim capacity. A typical portable classroom can provide capacity for a full-size class of students, however; several are currently used for special education students and the Title I program which have lower class sizes.

**Table 2  
Portable Classroom Inventory**

<b>Elementary School</b>	<b>Bldg Area</b>	<b>Teaching Stations</b>	<b>Interim Capacity</b>
Gold Bar Elementary	7,168 sf	8	202
Sultan Elementary	7,176 sf	8	202
<b>TOTAL</b>	<b>14,344 sf</b>	<b>16</b>	<b>404</b>

<b>Middle School</b>	<b>Bldg Area</b>	<b>Portable Classrooms</b>	<b>Interim Capacity</b>
Sultan Middle School	4,484 sf	5	150
<b>TOTAL</b>	<b>4,484 sf</b>	<b>5</b>	<b>150</b>

<b>High School</b>	<b>Bldg Area</b>	<b>Portable Classrooms</b>	<b>Interim Capacity</b>
Sultan High School	8,076 sf	9	288
<b>TOTAL</b>	<b>8,076 sf</b>	<b>9</b>	<b>288</b>

<b>GRAND TOTAL</b>	<b>26,904 sf</b>	<b>*30</b>	<b>842</b>
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\*Of the 30 portables listed in inventory, 15 are suitable for fulltime self-contained classrooms. The other inventory is utilized for part time use that includes: 5 computer labs, 2 Stem labs, Title I, Occupational Therapy, Special Education and PTA.

### **Support Facilities**

In addition to schools, the District owns and operates additional facilities that provide operational support functions to the schools. An inventory of these facilities is provided in Table 3.

**Table 3  
Support Facility Inventory**

<b>Facility</b>	<b>Building Area (Square Feet)</b>
Administration	3,149

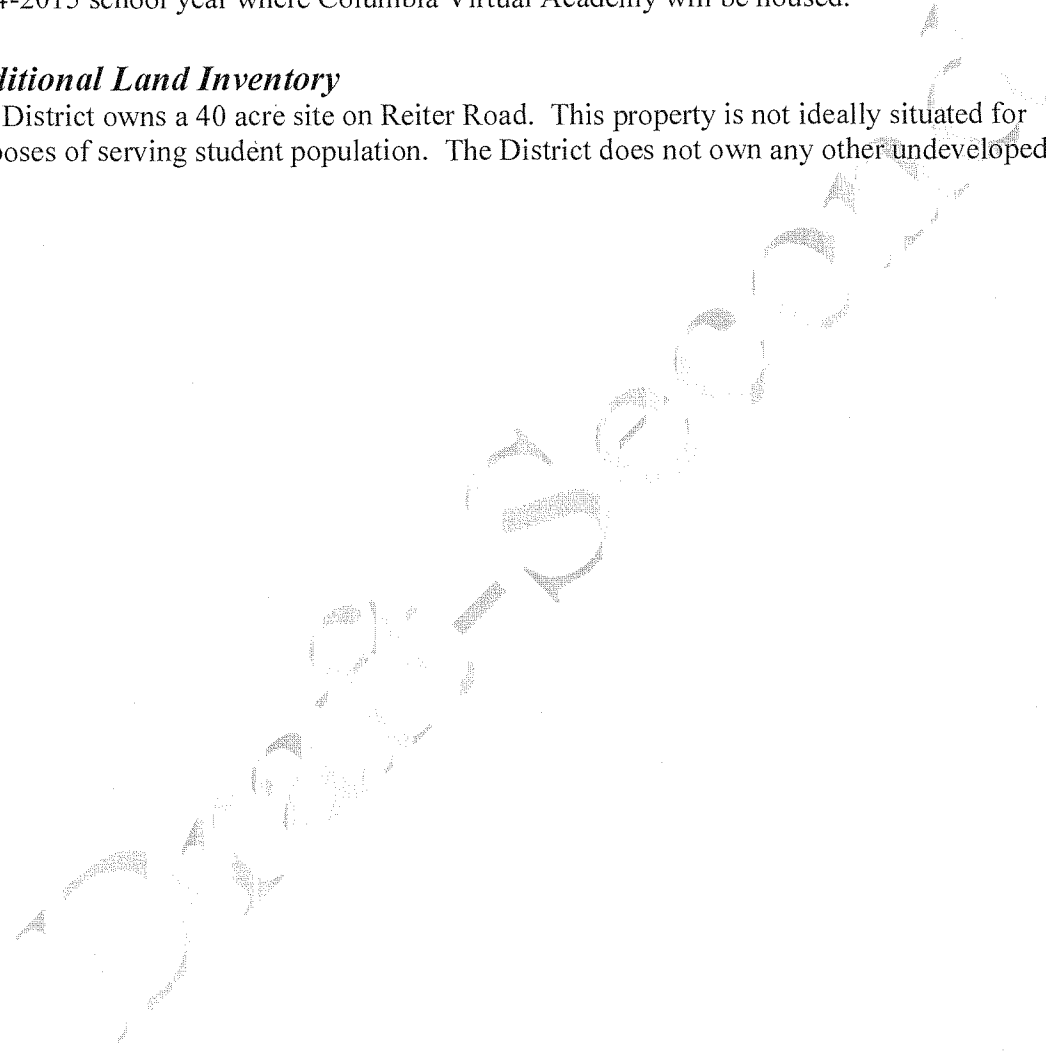
Gymnasium	6,000
Bus Garage/Storage	7,200
<b>TOTAL</b>	<b>16,349</b>

***Leased Facilities***

The Sky Valley Options Alternative High School, is in rented space from Mountain View Fellowship Church, 211 6<sup>th</sup> Street, Sultan, WA 98294. This lease will continue through the 2014-2015 school year where Columbia Virtual Academy will be housed.

***Additional Land Inventory***

The District owns a 40 acre site on Reiter Road. This property is not ideally situated for purposes of serving student population. The District does not own any other undeveloped land.





## **Section 5: Student Enrollment Projections**

### ***Student Enrollment Projections 2014 - 2019***

Enrollment projections are the 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 rate statistics in Snohomish County and population growth for the area are essential yearly activities in the ongoing management of the capital facilities plan. Any plans for new facilities can be delayed if enrollment projections and the economy indicate a downturn. It is much more difficult, however, to initiate new projects or speed projects up in the event enrollment growth exceeds the projections.

The District reviewed two methodologies available for enrollment projections and established, based on actual District data and experience, a third methodology for purposes of this Capital Facilities Plan. The District plans to closely monitor actual enrollment and, if necessary, make appropriate adjustments in the next Plan update.

1. The Office of Superintendent of Public Instruction (OSPI) projections (considered a lagging indicator) are based upon a modified “cohort survival method” which uses historical enrollment data from the previous 5 years to forecast the number of students who will be attending school in the following years, also known as a Linear Projection. The cohort survival method is primarily based on a student “headcount” and not a Full-Time Equivalent or “FTE”. This can be dramatically different when a kindergartener is calculated as a .5 FTE for half day kindergarten. In the case of Kindergarten students the only effect it would have on FTE is the amount of money we receive from the state as we already pay for full-time Kindergarten in our elementary school that does not qualify for state funding. It also doesn’t take into account eleventh and twelfth graders enrolled in the Alternative High School program who attend school for a partial school day, calculated at .5, .6, .75, etc. FTE but as 1 student for the headcount. The OSPI projections also do not exclude students participating in Alternative Learning Experiences (ALE) that do not use District facilities. Table 4 reflects the adjustment to the cohort survival report released by OSPI counting kindergarteners as a .5 FTE but does not breakdown the FTE count for eleventh and twelfth graders who attend as a partial FTE or exclude the ALE students who don’t require housing in District facilities.

Based upon the “cohort survival methodology,” the District’s enrollment will decrease by a total of 235 students by October 2019, a decrease of 10.0% from 2013 enrollment levels.

2. The Office of Financial Management (OFM)/Snohomish County “ratio method” comes from estimates based upon Snohomish County population estimates for people residing within the Sultan School District (both within the corporate City limits of Sultan and Gold Bar as well as unincorporated parts of Snohomish County). The ratio method incorporates kindergartners as a .5 FTE but does not break down the FTE count for eleventh and twelfth graders who attend as a partial FTE or exclude the ALE students who don’t require housing in District facilities.

OFM’s “ratio method” uses student to area population based enrollment projections calculated based on the 2035 population targets corresponding to the Snohomish County 2035 Population Forecast, Alternative #2. The District has chosen Alternative #2 since it contains the medium range forecast of potential growth. Between 2000 and 2013, the District’s enrollment constituted approximately 15.64% of the total population in the Sultan School District service area. Assuming that between 2013 and 2019 the District’s FTE enrollment will continue to constitute 15.64 of the Sultan School District service area population, and using OFM/County data, a total enrollment of 2,239 students is projected for 2019. This is an increase of 547 students, a 32.33% change.

- The District has developed its own methodology for forecasting future enrollments. This methodology, a modified cohort survival method, considers historic enrollment trends in the District and known data regarding local housing circumstances. For example, in the recent economic environment, the District has experienced a loss of student enrollment due to families moving out of the District. In addition, the District’s methodology accurately documents partial FTE students in the system and excludes ALE students who do not require housing in District facilities. Using these parameters, the District’s enrollment projections start with actual 2013 enrollment and use a modified growth factor to anticipate future enrollment growth over the six year planning period.

Based upon the District’s methodology, the District’s enrollment will decrease by a total of 228 students by October 2019, a decrease of 13.5% from 2013 enrollment levels.

OSPI, OFM, and the District’s modified enrollment projections are reflected in Table 4.

Method	2014	2015	2016	2017	2018	2019	Projected	Percent
							Change	Change
							2014-2019	2014-2019
OSPI Cohort Survival	1,623	1,554	1,535	1,512	1,475	1,457	-166	-10%
OFM/County Ratio	1,783	1,874	1,965	2,056	2,147	2,239	547	30.68%
District Methodology**	1,600	1,542	1,520	1,496	1,472	1,464	-136	-9%

\*\* Using reported FTE enrollment (which is adjusted only to reflect K enrollment at 0.5 FTE at one elementary school and .5 at another elementary school. This excludes unhoused ALE students.  
 \*\* Projected 14-15 FTE enrollment, as determined by District (reflecting adjusted FTEs and excluding unhoused ALE students).

The Sultan School District has chosen to follow the District developed methodology during this planning period because that methodology more accurately reflects the District’s facility needs at this time. However, the District intends to monitor closely enrollment data. In recent years, the District’s enrollment was growing due to new development. The current economic environment has slowed that trend. The District expects that, as the economy improves, student growth may occur both from new development and from families moving back into homes that are currently empty. The District will revisit the enrollment methodology in future updates to the CFP.

The District acknowledges that the City of Sultan’s Comprehensive Plan contains population projections that exceed the District’s methodology. The District intends to closely monitor growth and, should actual enrollment growth notably exceed the District’s projections, the

District will consider an amendment to the Capital Facilities Plan in order to implement plans for any necessary new capacity (which, based on current capacity inventory, would likely be necessary at the elementary level).

***Enrollment Projections - 2035***

Although student enrollment projections beyond 2019 are highly speculative, they are useful for developing long-range comprehensive plans. These long-range enrollment projections may also be used in determining future site acquisition needs. Using OFM data as a base, the District projects a 2035 student population of 2,722. This assumes that the District’s enrollment will continue to constitute 15.64% of the District’s total population through 2035.

The Total enrollment estimate is broken down by grade span to evaluate long-term needs for capital facilities. Again, these estimates are highly speculative and are used only for general planning purposes.

**Projected FTE Enrollment for 2035**

<b>Grade Span</b>	<b>2013*</b>	<b>2035</b>
<b>Elementary (K-5)</b>	754	1,218
<b>Middle School (6-8)</b>	425	684
<b>High School (9-12)</b>	510	820
<b>District Total</b>	1,692	2,722

\* Actual FTE Enrollment, October 2013

## **Section 6: Capital Facility Needs**

The projected available student capacity was determined by subtracting permanent school capacity (excluding portables) from projected student enrollment for each of the six years in the forecast period (2014-2019).

Capacity needs are expressed in terms of “unhoused students.” Unhoused students are defined as students expected to be housed in portable classrooms, or classrooms where class size exceeds State and/or District standards, or contractually negotiated agreements within the local school district.

**Table 6**  
**Unhoused Students – Based on October 2013 Enrollment Capacity**

<b>Grade Span</b>	<b>Available Capacity*</b>
Elementary Level (K-5)	(35)
Middle Level (6-8)	(205)
High School Level (9-12)	(130)

\*Numbers in parentheses indicate available capacity.

Assuming no new capacity additions during the six year period, Table 7 identifies the additional permanent classroom capacity that will be needed in 2019, the end of the six year forecast period:

**Table 7**  
**Unhoused Students – 2019**

<b>Grade Span</b>	<b>Available Capacity*</b>
Elementary Level (K-5)	(65)
Middle Level (6-8)	(271)
High School Level (9-12)	(262)

\*Numbers in parentheses indicate available capacity.

Projected future capacity needs, shown in Table 8, are derived by applying the projected number of students to the projected capacity. Planned improvements by the District through 2019 are included in Table 8 and include:

- Renovations are needed and are outlined on page 19 in planned improvements.
- The District plans to purchase land for a future elementary school (see page 19).

Note that it is not the District’s policy to include portable classrooms when determining future capital facility needs; therefore interim capacity provided by relocatable classrooms is not included. (Information on portable classrooms and interim capacity can be found in Table 2. Information on planned construction projects can be found in the Financing Plan, Table 11.)

**Table 8**  
**Projected Student Capacity – 2014 through 2019**

**Elementary School -- Surplus/Deficiency**

	<b>2013*</b>	<b>2014</b>	<b>2013</b>	<b>2014</b>	<b>2015</b>	<b>2016</b>	<b>2019</b>
Existing Capacity	792	792	792	792	792	792	792
Added Permanent Capacity	0	0	0	0	0	0	0
Total Capacity**	792	792	792	792	792	792	792
Enrollment	757	741	740	732	730	727	727
(+) Surplus or (-) Deficiency**	+35	+51	+52	+60	+62	+65	+65

\* Actual Oct. 2013 FTE enrollment

\*\*Does not include added portable capacity

**Middle School Level -- Surplus/Deficiency**

	<b>2013*</b>	<b>2014</b>	<b>2013</b>	<b>2014</b>	<b>2015</b>	<b>2016</b>	<b>2019</b>
Existing Capacity	630	630	630	630	630	630	630
Added Permanent Capacity	0	0	0	0	0	0	0
Total Capacity**	630	630	630	630	630	630	630
Enrollment	425	393	370	360	352	365	359
(+) Surplus or (-) Deficiency**	+205	+237	+260	+270	+278	+265	+271

\* Actual Oct. 2013 FTE enrollment

\*\*Does not include added portable capacity

**High School Level -- Surplus/Deficiency**

	<b>2013*</b>	<b>2014</b>	<b>2013</b>	<b>2014</b>	<b>2015</b>	<b>2016</b>	<b>2019</b>
Existing Capacity	640	640	640	640	640	640	640
Added Permanent Capacity	0	0	0	0	0	0	0
Total Capacity**	640	640	640	640	640	640	640
Enrollment	510	482	434	430	414	380	378
(+) Surplus or (-) Deficiency**	+130	+158	+206	+210	+226	+260	+262

\*Actual Oct. 2013 FTE enrollment

\*\*Does not include added portable capacity.

### ***Planned Improvements***

Current enrollment at each school span (elementary, middle and high school) is identified in Table 8. The District currently has available capacity to serve projected enrollment needs. Additional capacity at the elementary and high school levels, however, could be needed toward the end of the planning period. Certain events could accelerate these needs. For example, in addition to the expected conservative enrollment growth, as the economy improves, student growth may occur at a greater rate from new development and from families moving back into homes in the District that are currently empty. In addition, future planning may require more space at the elementary level to accommodate increased special program needs, shifting from half-day kindergarten to full-day kindergarten (if required by the Legislature or local service changes), reduced K-3 class size (if funded by the Legislature), changes to K-5 ALE enrollment, or adjustments in service standards. Any of these events would which negatively affect available regular capacity. To adequately plan for capacity needs, the District plans to purchase land for K-8 capacity during the six years of this planning period. Ideally, a 15 acre site is located in or near the City of Sultan. The District plans to monitor closely elementary capacity during the interim period before the next planning update. If enrollment growth should notably exceed the District's projections and existing capacity, the District will consider an amendment to the Capital Facilities Plan in order to implement plans for any needed new elementary capacity. For high school planning purposes, the District will continue to pursue options to acquire permanent space to house the Sky Valley Options students and the growing program at SVO. However, a specific solution has not been identified.

### ***Interim Classroom Facilities (Portables)***

During the six years of this planning period, the District will purchase portable classrooms as needed. Some portables may be relocated if feasible. It remains a District goal to house all students in permanent facilities.

## **Section 7: Financial Plan**

Funding of school facilities is typically secured from a number of sources including voter approved bonds, State matching funds and development impact fees. Each of these 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. Future bonds will require input from community and staff and decisions by the Board of Directors. General Obligation Bonds would be the primary source of funding for future capital improvement projects.

### ***State Matching Funds***

State Matching 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 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.

If a District's project qualifies, it can become part of a State prioritization system. This system prioritizes allocation of available funding resources to school districts statewide based on seven prioritization categories. The Sultan School District's matching ratio is 60.73%.

State matching funds can only be applied to major school construction projects. Site acquisition and minor improvements are not eligible to receive matching funds from the State. Because availability of State matching 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 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 State's share coming from funds allocated in future district projects). When the State share is finally disbursed (without accounting for cost escalation) a district's project is partially reimbursed.

### ***School 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. The District will not request the collection of school impact fees for 2015. The District may request impact fees in future CFP updates.

### ***Six-Year Financial Plan***

The Six-Year Financial Plan shown on Table 11 is a summary of the budget that supports the Capital Facilities Plan. The financing components include possible funding from capital bonds

and levies, development impact fees collected under the GMA or other local funding, and State matching funds (dependent upon qualifying, level of funding and availability of funds).

Table 10  
Finance Plan  
2012-2017

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

Project	2014	2015	2016	2017	2018	2019	Total Cost	Bonds/Levys	State Match	Impact Fees	Future Sources
Elementary											
Site Acquisition										X	X
Construction											
Purchase Portables		\$0.220					\$0.220				
Middle School											
Site Acquisition											
Construction											
Purchase Portables											
High School											
Site Acquisition											
Construction											
Purchase Portables											

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

Project	2014	2015	2016	2017	2018	2019	Total Cost	Bonds/Levy	State Match	Impact Fees	Future Sources

**Total Improvements (Costs in Millions)**

	2014	2015	2016	2017	2018	2019	Total Cost	Bonds/Levy	State Match	Impact Fees	Future Sources
Elementary		\$0.220					\$0.220			X	X
Middle School											
High School											
Districtwide Improvements											
<b>TOTALS</b>		\$0.220					\$0.220				



## **Section 8: Impact Fees**

### ***Impact Fee Calculation Parameters***

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. Fees also cannot be used to make up for capacity deficiencies existing on the date of Plan adoption. Fees may only be assessed in relation to the new capacity needs created by new development.

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

The District must provide support data including:

- (a) An explanation of the calculation methodology, including description of key variables and their computation; and
- (b) 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 6-year financing program;

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/ 2 or more bedrooms
3. Multi-family/studio or 1-bedroom;

### ***Impact Fees in Snohomish County***

In November 1997, Snohomish County substantially modified Title 26C to convert it into an impact fee program meeting new requirements of the GMA and changes to RCW 82.02, the State law authorizing impact fees. On February 1, 2003, Snohomish County adopted a revision of Title 26C, thus replacing it with Chapter 30.66C, as defined by the Uniform Development Code.

Chapter 30.66C requires school districts to prepare and adopt Capital Facilities Plans meeting the specifications of the GMA. Impact fees calculated in accordance with the formula in Chapter 30.66C will become effective following County Council adoption of the District's plan. Generally, impact fee ordinances adopted by cities in Snohomish County that require compliance with the County's Chapter 30.66C criteria and which adopt the County-approved CFP by reference, will comply with the GMA. Local governments, of course, have the ability to adopt their own approach to impact fee assessment, provided the approach meets the requirements of GMA and RCW 82.02. Impact fees are not to be used for projects, or portions of projects, which address existing deficiencies.

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

The District will not request the collection of impact fees for 2015. The District may request impact fees in future CFP updates.

**Table 12**  
**School Impact Fees – 2014 - 2019**

Housing Type	Impact Fee Per Unit
<i>Single Family Residential</i> (detached)	\$0
<i>Multi-Family (2+ bdrms)</i> (attached )	\$0
<i>Multi-Family (studio or 1 bdrm)</i> (attached)	\$0

**Table 13**  
**School Impact Fees Collected/Spent-2012-2017**

Housing Type	Impact Fees Collected	Impact Fees Spent
<b>Single Family Residential</b> (detached)	\$3,346	\$0
<b>Multi-Family (2+ bdrms)</b> (attached)	\$2,878	\$0
<b>Multi-Family (studio or 1 bdrm)</b> (attached)	\$0	\$0

**Appendix A-Historical View of the Sultan School District**

In 2005 the Sultan School District experienced its highest traditional FTE count even when we had 2,171 FTE enrolled on October 1, 2005. This enrollment level was maintained with little variation through the 06-07 budget cycle. In August of 2007 the Sultan School District started its first alternative school high school and had an enrollment of 35.69 FTE for the 2007-2008 school year. The final year of this program will be 2013-2014. See the table below for the historical enrollment.

Table 1. Alternative School Enrollment

2007-2008	2008-2009	2009-2010	2010-2011	2011-2012	2012-2013	2013-2014
35.69	72.18	61.24	60.42	49.52	42.98	32.51
Grad w/HS	Grad w/HS	11 graduates	13 graduates	14 graduates	16 graduates	12 graduates

As we have moved forward, enrollment in our traditional schools has continued to decline as well. As mentioned previously traditional enrollment has been decreasing as well. From the 2010-2011 school year to the budget set for 2014-2015 we have experienced a 10.5% decrease in traditional enrollment. The projection of decrease would be greater if it were not for an additional 28 FTE budgeted for fulltime Kindergarten that will be funded in the 2014-2015 school year.

Table 2. Traditional Enrollment

2010-2011	2011-2012	2012-2013	2013-2014	2014-2015
1,799	1,761	1,721	1,693	1,628