

1 ADOPTED: 11/10/20  
2 EFFECTIVE: 01/01/21

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6  
7 SNOHOMISH COUNTY COUNCIL  
8 Snohomish County, Washington

9  
10 ORDINANCE NO. 20-072

11  
12 ADOPTING THE 2020-2025 CAPITAL FACILITIES PLANS FOR THE  
13 ARLINGTON NO. 16, EDMONDS NO. 15, EVERETT NO. 2, LAKE STEVENS NO. 4,  
14 LAKEWOOD NO. 306, MARYSVILLE NO. 25, MONROE NO. 103, MUKILTEO NO. 6,  
15 SNOHOMISH NO. 201, AND SULTAN NO. 311 SCHOOL DISTRICTS, AND THE 2020-  
16 2026 CAPITAL FACILITIES PLAN FOR THE NORTHSORE NO. 417 SCHOOL  
17 DISTRICT PURSUANT TO SCC 30.66C.020 AND AMENDING  
18 THE SCHOOL IMPACT FEE SCHEDULE IN SCC 30.66C.100

19  
20 WHEREAS, in 1999 Snohomish County (“the County”) adopted an impact fee  
21 ordinance to provide mitigation for the impacts of new development on public school  
22 facilities pursuant to RCW 82.02.050; and

23  
24 WHEREAS, pursuant to RCW 82.02.050(5)(a), impact fees may be collected and  
25 spent only for the public facilities defined in RCW 82.02.090, which are addressed by  
26 the capital facilities element of the County’s Growth Management Act Comprehensive  
27 Plan (“GMACP”) created under the Growth Management Act (GMA), Chapter 36.70A  
28 RCW; and

29  
30 WHEREAS, pursuant to Snohomish County Code (SCC) 30.66C.035, school  
31 districts must submit capital facilities plans to the County for inclusion in the County’s  
32 capital facilities plan, part of the capital facilities element of the GMACP, to be eligible to  
33 receive payment of school impact fees; and

34  
35 WHEREAS, under SCC 30.66C.230, each participating school district must enter  
36 into an agreement with the County addressing the reimbursement of the actual  
37 administrative costs of assessing, collecting and handling fees for the district, any legal  
38 expenses and staff time associated with defense of the impact fee program against  
39 district-specific challenges, and payment of any refunds required under the impact fee  
40 program; and

41  
42 WHEREAS, the eleven participating school districts and the County executed  
43 agreements as required under SCC 30.66C.230; and

44  
45 WHEREAS, capital facilities plans for the Arlington School District No. 16,  
46 Edmonds School District No. 15, Everett School District No. 2, Lake Stevens School  
47 District No. 4, Lakewood School District No. 306, Marysville School District No. 25,

ORDINANCE NO. 20-072  
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ARLINGTON NO. 16, EDMONDS NO. 15, EVERETT NO. 2, LAKE  
STEVENS NO. 4, LAKEWOOD NO. 306, MARYSVILLE NO. 25,  
MONROE NO. 103, MUKILTEO NO. 6, SNOHOMISH NO. 201, AND  
SULTAN NO. 311 SCHOOL DISTRICTS, AND THE 2020-2026 CAPITAL  
FACILITIES PLAN FOR THE NORTHSORE NO. 417 SCHOOL  
DISTRICT PURSUANT TO SCC 30.66C.020 AND AMENDING THE  
SCHOOL IMPACT FEE SCHEDULE IN SCC 30.66C.100

1 Monroe School District No. 103, Mukilteo School District No. 6, Northshore School  
2 District No. 417, and Snohomish School District No. 201 were last adopted by  
3 Snohomish County in 2018 and will expire on December 31, 2020; and  
4

5 WHEREAS, the eleven aforementioned school districts (collectively “the  
6 Districts”) must submit updated capital facilities plans to the County for review and  
7 adoption before December 31, 2020, to maintain or re-establish their eligibility to receive  
8 school impact fees after December 31, 2020; and  
9

10 WHEREAS, the Districts each submitted an updated capital facilities plan for  
11 2020-2025 to the Snohomish County Department of Planning and Development  
12 Services (PDS) pursuant to SCC 30.66C.035; and  
13

14 WHEREAS, the Index School District No. 63, Darrington School District No. 330,  
15 Granite Falls School District No. 332 and Stanwood/Camano Island School District No.  
16 401 have not submitted school capital facilities plans for this 2020 update; and  
17

18 WHEREAS, PDS has reviewed the Districts’ 2020 capital facility plans, including  
19 the impact fee calculations using SCC 30.66C.045, consulted with the school technical  
20 review committee authorized by SCC 30.66C.050(3), and determined that each 2020  
21 capital facilities plan meets the requirements of SCC 30.66C.040 and Appendix F of the  
22 GMACP - General Policy Plan (GPP); 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 Snohomish County Planning Commission (“the Planning  
33 Commission”) held a public hearing on September 22, 2020, on the Districts’ 2020  
34 capital facilities plans and the proposed amended impact fee schedule; and  
35

36 WHEREAS, at the conclusion of the public hearing, the Planning Commission  
37 voted to recommend adoption of each of the Districts’ 2020 capital facilities plans and  
38 proposed an amended impact fee schedule as shown in its recommendation letter  
39 dated September 24, 2020; and  
40

41 WHEREAS, on November 10, 2020, the Snohomish County Council (the “County  
42 Council”) held a public hearing after proper notice, received public testimony related to  
43 this Ordinance No. 20-072, and considered the entire record, including the Planning  
44 Commission’s recommendations; and  
45

46 WHEREAS, following the public hearing on November 10, 2020, the County  
47 Council deliberated on this Ordinance No. 20-072; and  
48

ORDINANCE NO. 20-072  
ADOPTING THE 2020-2025 CAPITAL FACILITIES PLANS FOR THE  
ARLINGTON NO. 16, EDMONDS NO. 15, EVERETT NO. 2, LAKE  
STEVENS NO. 4, LAKEWOOD NO. 306, MARYSVILLE NO. 25,  
MONROE NO. 103, MUKILTEO NO. 6, SNOHOMISH NO. 201, AND  
SULTAN NO. 311 SCHOOL DISTRICTS, AND THE 2020-2026 CAPITAL  
FACILITIES PLAN FOR THE NORTHSORE NO. 417 SCHOOL  
DISTRICT PURSUANT TO SCC 30.66C.020 AND AMENDING THE  
SCHOOL IMPACT FEE SCHEDULE IN SCC 30.66C.100

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

4  
5 NOW, THEREFORE, BE IT ORDAINED:

6  
7 Section 1. The County Council adopts the foregoing recitals as findings of fact  
8 as if set forth in full herein.

9  
10 Section 2. The County Council makes the following additional findings of fact in  
11 support of this ordinance:

12  
13 A. A school district must prepare and adopt a capital facilities plan that meets  
14 the requirements of Chapter 36.70A RCW and RCW 82.02.020 to participate in the  
15 impact fee program. A school district's capital facilities plan expires two years from the  
16 date of its effective date or when the County Council adopts an updated capital facilities  
17 plan that meets the requirements of Chapter 30.66C SCC and the GMA.

18  
19 B. The Districts submitted capital facilities plans to PDS for the 2020 biennial  
20 update as required under SCC 30.66C.035.

21  
22 C. Index School District No. 63, Darrington School District No. 330, Granite Falls  
23 School District No. 332, and Stanwood/Camano Island School District No. 401 did not  
24 submit capital facilities plans for the period for this 2020 biennial update meaning the  
25 County will neither impose nor collect impact fees for those districts during the 2021 -  
26 2022 biennial period. Index School District No. 63, Darrington School District No. 330,  
27 Granite Falls School District No. 332, and Stanwood/Camano Island School District No.  
28 401 are not currently listed on the school impact fee schedule, SCC Table  
29 30.66C.100(1).

30  
31 D. PDS reviewed each of the Districts' 2020 capital facilities plans, including the  
32 impact fee calculations, using the formula in SCC 30.66C.045 and determined that each  
33 capital facilities plan meets the requirements of SCC 30.66C.040. This determination  
34 was made after consultation with the school technical review committee that reviewed  
35 each capital facilities plan prior to the Planning Commission's public hearing.

36  
37 E. This ordinance is adopted to implement Chapter 30.66C SCC and to adopt  
38 the Districts' 2020 capital facilities plans.

39  
40 F. The adoption of this ordinance exercises the County's authority to impose  
41 impact fees pursuant to RCW 82.02.050.

42  
43 G. The Districts' 2020 capital facilities plans adopted herein will further the goals  
44 of the GMA by providing adequate public-school facilities to accommodate growth.

45  
46 H. Amendment of SCC 30.66C.100 is necessary to adopt an updated impact fee  
47 schedule consistent with the Districts' 2020 capital facilities plans.

1 I. Pursuant to SCC 30.66C.100, the County reduces the amount of the impact  
2 fee calculated by the Districts by fifty percent.  
3

4 J. SEPA requirements have been satisfied by each school district, acting as lead  
5 agency, completing an environmental checklist and issuing a Determination of  
6 Nonsignificance for its capital facilities plan. The County adopts and incorporates by  
7 this reference the SEPA determinations made by the respective school districts.  
8

9 K. The Planning Commission reviewed the Districts' 2020 capital facilities plans,  
10 conducted a public hearing on each 2020 capital facilities plan and made its  
11 recommendation as evidenced in its recommendation letter dated September 24, 2020.  
12

13 L. The County Council conducted a public hearing on November 10, 2020, on  
14 this Ordinance No. 20-072.  
15

16 Section 3. The County Council makes the following conclusions:  
17

18 A. The Districts' 2020 capital facilities plans each individually meet the  
19 requirements of Chapter 30.66C SCC and the requirements of Appendix F of the GPP  
20 concerning the operation and administration of a school impact fee program.  
21

22 B. The public participation requirements of the SCC and GMA have been met  
23 through the public hearings conducted by the Planning Commission and the County  
24 Council.  
25

26 C. The SEPA requirements for the Districts' 2020 capital facilities plans have  
27 been met.  
28

29 D. The adoption of the Districts' capital facilities plans is consistent with the  
30 GMACP, the Countywide Planning Policies for Snohomish County, and the GMA.  
31

32 E. The GMA allows the County to amend the GMACP more frequently than once  
33 per year if the amendment is to the capital facilities element and occurs concurrently  
34 with the adoption or amendment of the County's budget. This criterion is met because  
35 this ordinance will be considered concurrently with the County's annual budget  
36 ordinance, fulfilling the GMA, the Snohomish County Charter, and SCC requirements  
37 that link the capital improvement program to the budget.  
38

39 F. Each of the Districts' 2020 capital facilities plans shall be incorporated by  
40 reference into the capital facilities element of the GMACP as provided by SCC  
41 30.66C.055.  
42

43 Section 4. Arlington School District No. 16's 2020-2025 Capital Facilities Plan,  
44 attached as Exhibit A-1, is adopted and incorporated herein by reference as if set forth  
45 in full and replaces the 2018-2023 Capital Facilities Plan adopted by Amended  
46 Ordinance No. 18-083, based on the foregoing findings and conclusions.  
47

1 Section 5. Edmonds School District No. 15's 2020-2025 Capital Facilities Plan,  
2 attached as Exhibit A-2, is adopted and incorporated herein by reference as if set forth  
3 in full and replaces the 2018-2023 Capital Facilities Plan adopted by Amended  
4 Ordinance No. 18-083, based on the foregoing findings and conclusions.  
5

6 Section 6. Everett School District No. 2's 2020-2025 Capital Facilities Plan,  
7 attached as Exhibit A-3, is adopted and incorporated herein by reference as if set forth  
8 in full and replaces the 2018-2023 Capital Facilities Plan adopted by Amended  
9 Ordinance No. 18-083, based on the foregoing findings and conclusions.  
10

11 Section 7. Lake Stevens School District No. 4's 2020-2025 Capital Facilities  
12 Plan, attached as Exhibit A-4, is adopted and incorporated herein by reference as if set  
13 forth in full and replaces the 2018-2023 Capital Facilities Plan adopted by Amended  
14 Ordinance No. 18-083, based on the foregoing findings and conclusions.  
15

16 Section 8. Lakewood School District No. 306's 2020-2025 Capital Facilities Plan,  
17 attached as Exhibit A-5, is adopted and incorporated herein by reference as if set forth  
18 in full and replaces the 2018-2023 Capital Facilities Plan adopted by Amended  
19 Ordinance No. 18-083, based on the foregoing findings and conclusions.  
20

21 Section 9. Marysville School District No. 25's 2020-2025 Capital Facilities Plan,  
22 attached as Exhibit A-6, is adopted and incorporated herein by reference as if set forth  
23 in full and replaces the 2018-2023 Capital Facilities Plan adopted by Amended  
24 Ordinance No. 18-083, based on the foregoing findings and conclusions.  
25

26 Section 10. Monroe School District No. 103's 2020-2025 Capital Facilities Plan,  
27 attached as Exhibit A-7, is adopted and incorporated herein by reference as if set forth  
28 in full and replaces the 2018-2023 Capital Facilities Plan adopted Amended Ordinance  
29 No. 18-083, based on the foregoing findings and conclusions.  
30

31 Section 11. Mukilteo School District No. 6's 2020-2025 Capital Facilities Plan,  
32 attached as Exhibit A-8, is adopted and incorporated herein by reference as if set forth  
33 in full and replaces the 2018-2023 Capital Facilities Plan adopted by Amended  
34 Ordinance No. 18-083, based on the foregoing findings and conclusions.  
35

36 Section 12. Northshore School District No. 417's 2020-2026 Capital Facilities  
37 Plan, attached as Exhibit A-9, is adopted and incorporated herein by reference as if set  
38 forth in full and replaces the 2018-2024 Capital Facilities Plan adopted by Amended  
39 Ordinance No. 18-083, based on the foregoing findings and conclusions.  
40

41 Section 13. Snohomish School District No. 201's 2020-2025 Capital Facilities  
42 Plan, attached as Exhibit A-10, is adopted and incorporated herein by reference as if set  
43 forth in full and replaces the 2018-2023 Capital Facilities Plan adopted by Amended  
44 Ordinance No. 18-083, based on the foregoing findings and conclusions.  
45

46 Section 14. Sultan School District No. 311's 2020-2025 Capital Facilities Plan,  
47 attached as Exhibit A-11, is adopted and incorporated herein by reference as if set forth

1 in full and replaces the 2018-2023 Capital Facilities Plan adopted by Amended  
2 Ordinance No. 18-083, based on the foregoing findings and conclusions.

3  
4 Section 15. Each of the Districts' capital facilities plans adopted by this  
5 ordinance shall remain in effect for a period of two years from the effective date of this  
6 ordinance, unless an updated plan is submitted and approved prior to that date  
7 pursuant to the requirements of Chapter 30.66C SCC and the GMA.

8  
9 Section 16. Snohomish County Code Section 30.66C.100, last amended by  
10 Amended Ordinance No. 18-083 on, November 19, 2018, is hereby amended to read:

11  
12 **30.66C.100 Fee required.**

13  
14  
15 (1) Each development, as a condition of approval, shall be subject to the school impact  
16 fee established pursuant to this chapter. The school impact fee shall be calculated in  
17 accordance with the formula established in SCC 30.66C.045.

18 (2) The fees listed in Table 30.66C.100(1) represent one-half of the amount calculated  
19 by each school district in its respective capital facilities plan in accordance with the  
20 formula identified in SCC 30.66C.045.

21 (3) The payment of school impact fees will be required prior to issuance of building  
22 permits, except as provided in SCC 30.66C.200(2). The amount of the fee due shall be  
23 based on the fee schedule in effect at the time of filing a complete application for  
24 development. For building permit applications received by the department more than  
25 five years after the filing of a complete application for development, the amount of the  
26 fee due shall be based on the fee schedule in effect at the time of building permit  
27 application.

28 (4) The department shall maintain and provide to the public upon request a table  
29 summarizing the schedule of school impact fees for each school district within the  
30 county.

31 (5) The fees set forth in Table 30.66C.100(1) apply to developments that vest to county  
32 development regulations from January 1, (~~2019~~) 2021, to December 31, (~~2020~~)  
33 2022.

34 (6) Building permits submitted after January 1, 1999, for which prior plat approval has  
35 been obtained under chapter 30.66C SCC as codified prior to January 1, 1999, shall be  
36 subject to the school impact fees established pursuant to this chapter, as set forth in this  
37 section, except as provided in SCC 30.66C.010(2).

38 **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 per dwelling unit
Arlington No. 16	(( <del>\$4,756</del> ) <u>\$3,811</u> )	\$0	(( <del>\$6,790</del> ) <u>\$3,455</u> )	(( <del>\$6,790</del> ) <u>\$3,455</u> )
Edmonds No. 15	\$0	\$0	\$0	\$0
Everett No. 2	(( <del>\$14,250</del> ) <u>\$5,358</u> )	\$0	(( <del>\$9,125</del> ) <u>\$3,010</u> )	(( <del>\$9,125</del> ) <u>\$3,010</u> )
Lake Stevens No. 4	(( <del>\$7,235</del> ) <u>\$9,788</u> )	\$0	(( <del>\$3,512</del> ) <u>\$7,672</u> )	(( <del>\$3,512</del> ) <u>\$7,672</u> )
Lakewood No. 306	(( <del>\$847</del> ) <u>\$3,566</u> )	(( <del>\$0</del> ) <u>\$445</u> )	(( <del>\$2,022</del> ) <u>\$1,641</u> )	(( <del>\$2,022</del> ) <u>\$1,641</u> )
Marysville No. 25	\$0	\$0	\$0	\$0
Monroe No. 103	(( <del>\$3,956</del> ) <u>\$3,803</u> )	\$0	(( <del>\$6,276</del> ) <u>\$7,638</u> )	(( <del>\$6,276</del> ) <u>\$7,638</u> )
Mukilteo No. 6	(( <del>\$4,257</del> ) <u>\$5,048</u> )	\$0	(( <del>\$5,768</del> ) <u>\$8,924</u> )	(( <del>\$5,768</del> ) <u>\$8,924</u> )
Northshore No. 417	(( <del>\$16,038</del> ) <u>\$17,080</u> )	\$0	(( <del>\$1,818</del> ) <u>\$1,504</u> )	(( <del>\$1,818</del> ) <u>\$1,504</u> )
Snohomish No. 201	(( <del>\$0</del> ) <u>\$6,039</u> )	\$0	(( <del>\$0</del> ) <u>\$260</u> )	(( <del>\$0</del> ) <u>\$260</u> )
Sultan No. 311	(( <del>\$1,132</del> ) <u>\$2,966</u> )	\$0	(( <del>\$1,374</del> ) <u>\$2,685</u> )	(( <del>\$1,374</del> ) <u>\$2,685</u> )

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Section 17. 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 18. The effective date of this ordinance shall be January 1, 2021.

Section 19. If any section, sentence, clause or phrase of this ordinance shall be held to be invalid or unconstitutional by the Growth Management Hearings Board ("Board") or a court of competent jurisdiction, such invalidity or unconstitutionality shall not affect the validity or constitutionality of any other section, sentence, clause or phrase

1 of this ordinance. Provided, however, if any section, sentence, clause or phrase of this  
2 ordinance is held to be invalid by the Board or court of competent jurisdiction, then the  
3 section, sentence, clause or phrase in effect prior to the effective date of this ordinance  
4 shall be in full force and effect for that individual section, sentence, clause or phrase as  
5 if this ordinance had never been adopted.  
6  
7

8 PASSED this 10th day of November, 2020.  
9

10 SNOHOMISH COUNTY COUNCIL  
11 Snohomish County, Washington

12   
13 \_\_\_\_\_  
14 Chairperson  
15

16 ATTEST:

17   
18 \_\_\_\_\_  
19 Clerk of the Council  
20

- 21 ( X ) APPROVED
- 22 ( ) VETOED
- 23 ( ) EMERGENCY
- 24
- 25
- 26
- 27

DATE: November 23, 2020

28   
29 \_\_\_\_\_  
30 Snohomish County Executive  
31

32 ATTEST:

33   
34 \_\_\_\_\_  
35

36 Approved as to form only:

37   
38 \_\_\_\_\_  
39 Deputy Prosecuting Attorney  
40  
41  
42  
43

D-19



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**ARLINGTON PUBLIC SCHOOLS**  
**CAPITAL FACILITIES PLAN**  
**2020-2025**

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**ARLINGTON**  
**PUBLIC SCHOOLS**  
**EDUCATE • PREPARE • INSPIRE**

**Adopted: August 10, 2020**

**ARLINGTON PUBLIC SCHOOLS**  
**CAPITAL FACILITIES PLAN**  
**2020-2025**

**BOARD OF DIRECTORS**  
**Judy Fay, President**  
**Mary Levesque**  
**Michael Ray, Vice President**  
**Marc Rosson**

**SUPERINTENDENT**  
**Dr. Chrys Sweeting**

For information regarding the Arlington Public Schools Capital Facilities Plan, contact the Office of the Superintendent, District Administration Office, 315 N. French Street, Arlington, WA 98223. Telephone: (360) 618-6200; Fax: (360) 618-6221.

Approved by the Board of Directors on August 10, 2020

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Appendix B .....	Student Generation Rates
Appendix C .....	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.

Arlington Public Schools (the “District”) has prepared this Capital Facilities Plan (the “CFP”) to provide Snohomish County (the “County”) and the City of Arlington (the “City”) with a schedule and financing program for capital improvements over the next six years (2020-2025).

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

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

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

- District should use information from recognized sources, such as the U.S. Census or the Puget Sound Regional Council. School districts may generate their own data if it is derived through statistically reliable methodologies. The information must not be inconsistent with Office of Financial Management (“OFM”) population forecasts. Student generation rates must be independently calculated by each school district.
- The CFP must comply with the GMA.
- The methodology used to calculate impact fees must comply with the GMA. In the event that impact fees are not available due to action by the state, county or cities within the District, the District in a future CFP update must identify alternative funding sources to replace the intended impact fee funding.
- The methodology used to calculate impact fees complies with the criteria and the formulas established by the County and the City.

Snohomish County’s Countywide Planning Policies direct jurisdictions in Snohomish County to “ensure the availability of sufficient land and services for future K-20 school needs.” Policy ED-11. The District appreciates any opportunity for cooperative planning efforts with its jurisdictions.

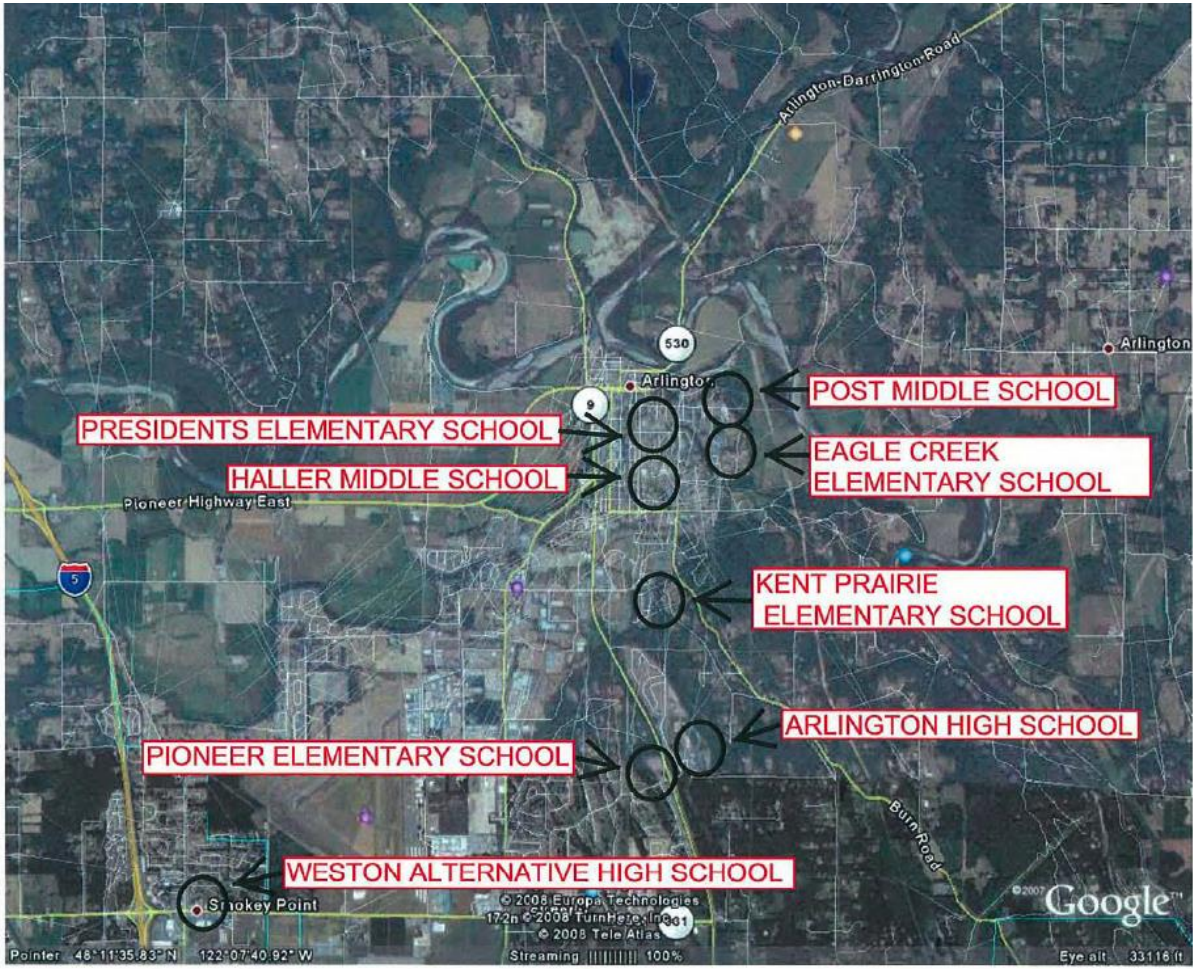
***B. Overview of Arlington Public Schools***

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

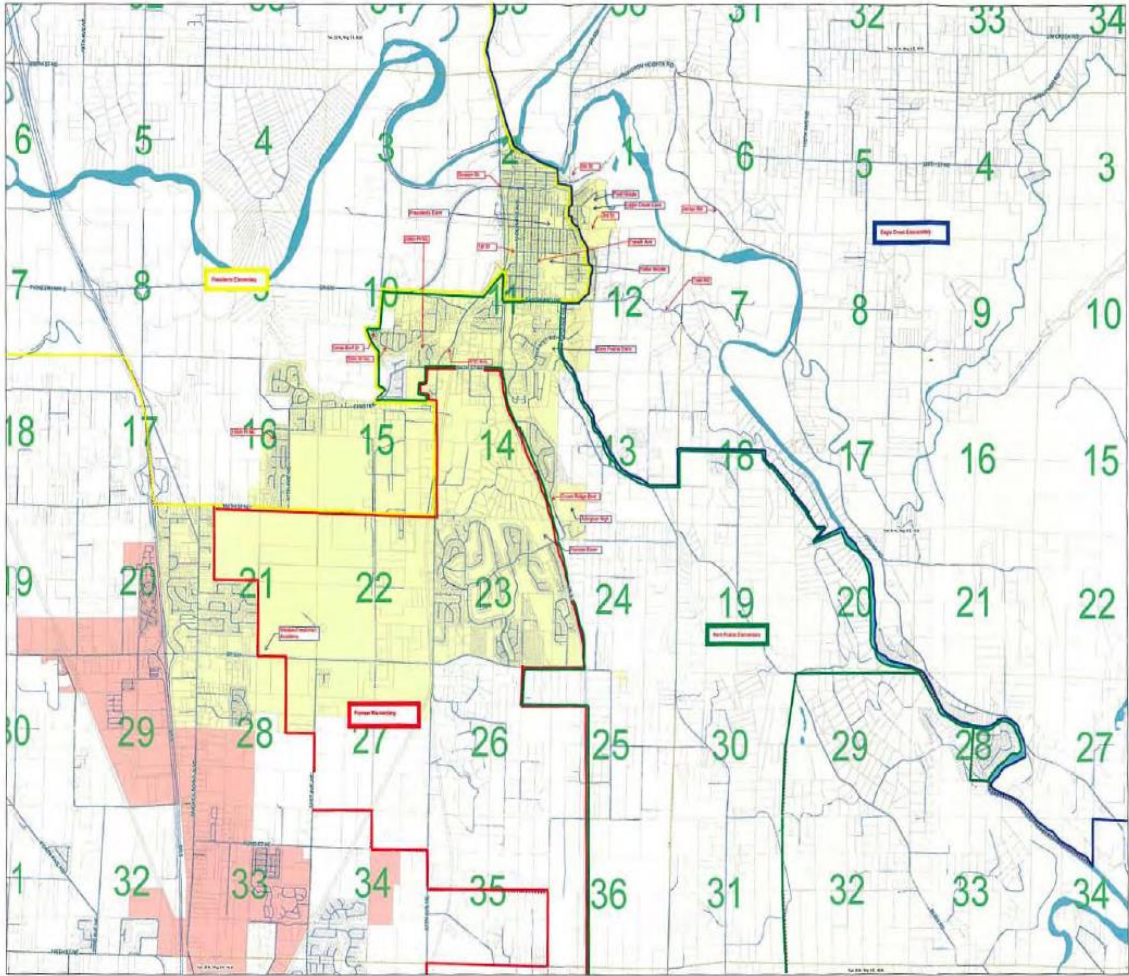
The District serves a student population of 5,581 (October 1, 2019 FTE enrollment) with four elementary schools (K-5), two middle schools (grades 6-8), one high school (grades 9-12), one alternative high school (grades 9-12), and one support facility for home schooled children (grades K-12). For the purposes of facility planning, this CFP considers grades K-5 as elementary, grades 6-8 as middle school, and grades 9-12 as high school. For purposes of this CFP, neither enrollment in the Stillaguamish Valley School (a home school support facility serving grades K-12) nor enrollment in the alternative high school (Weston) are included.

The District has experienced moderate growth in recent years after a period of declining student population. For a period of years (2012-2015) the District, due to the declining student population, did not prepare an updated Capital Facilities Plan. The District prepared a CFP in 2016 in anticipation of potential growth, enrollment increases, and future capacity needs. Growth has been steady in the District since 2016 and is projected to continue to increase at all grade levels over the six year planning period. This 2020 update builds on the 2018 CFP and identifies growth-related projects at the middle and high school levels, and future planning for new capacity at the elementary level.

**FIGURE 1  
MAP OF FACILITIES**



**ARLINGTON SCHOOL DISTRICT #16 FACILITIES MAP**



# Arlington School District # 16



2

- Legend**
- Parish
  - Roads
  - District Boundary NAME
  - Township
  - Sectors
  - Water
  - City Boundaries
  - ARLINGTON
  - GRANITE FALLS
  - MARYSVILLE

Information on this map is derived from GIS data as of 10/15/2014. The information is provided for informational purposes only and is not intended to be used for legal or other purposes. The information is provided as is and without warranty. The user assumes all liability for any use of the information. The information is provided for informational purposes only and is not intended to be used for legal or other purposes. The information is provided as is and without warranty. The user assumes all liability for any use of the information.

## SECTION 2 DISTRICT EDUCATIONAL PROGRAM STANDARDS

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

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

### ***A. Districtwide Educational Program Standards***

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

- APPLE (formerly named ECEAP);
- Elementary program for handicapped students; and
- Enhanced Learning Program/Highly Capable; and
- English Language Learner Program (Eagle Creek Elementary).

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

The District educational program standards which directly affect school capacity are outlined below for the elementary, middle, and high school grade levels. Each grade span has a targeted level of service (LOS) which is expressed as a "not to exceed" number. The minimum LOS for each grade span is expressed as "maximum average class size". This figure is used to determine when another class is added. When this average is exceeded, the District will add additional classes if space is available. Only academic classes are used to compute the maximum average class size.

The District has fully implemented full-day kindergarten in and reduced K-3 class size requirements.



***B. Educational Program Standards for Elementary Schools***

- Class size for Kindergarten and grades 1-3 is targeted not to exceed 21 students, with a maximum average class size of 21 students;
- Class size for grade 4 is targeted not to exceed 25 students, with a maximum average class size of 27 students;
- Class size for grade 5 is targeted not to exceed 27 students, with a maximum average class size of 29 students;
- Special Education for some students is provided in a self-contained classroom;
- Music instruction will be provided in a separate classroom (when available); and
- All elementary schools currently have a room dedicated as a computer lab, or have access to mobile carts with laptop computers for classroom use.

***C. Educational Program Standards for Middle and High Schools***

- Class size for grade 6 is targeted not to exceed 27 students, with a maximum average class size of 29 students
- Class size for middle school grades 7-8 is targeted not to exceed 29 students, with a maximum average class size of 31 students;
- Class size for high school grades 9-12 is targeted not to exceed 30 students, with a maximum average class size of 32 students;
- It is not possible to achieve 100% utilization of all regular teaching stations throughout the day. Therefore, high school classroom capacity has been adjusted using a utilization factor in the range of 90% to 96% (based on a regular school day). Middle school classroom capacity has been adjusted using a utilization factor of 85%;
- Special Education for some students will be provided in a self-contained classroom; and
- Identified students will also be provided other programs in classrooms designated as follows:
  1. Resource Rooms (i.e. computer labs, study rooms).
  2. Learning Support Centers.
  3. Program Specific Classrooms (i.e., music, drama, art, home and family education).

***D. 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

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 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 26 students and average class size in 9-12 classrooms will not exceed 32 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.

For the school years of 2017-18 and 2018-19, the District’s compliance with the minimum level of service was as follows

2017-18 School Year						
LOS Standard	<b>MINIMUM LOS# Elementary</b>	<b>REPORTED LOS Elementary</b>	<b>MINIMUM LOS Middle</b>	<b>REPORTED LOS Middle</b>	<b>MINIMUM LOS High</b>	<b>REPORTED LOS High</b>
	26	21.7	26	19.4	32	32.5

\* The District determines the reported 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.

2018-19 School Year						
LOS Standard	<b>MINIMUM LOS# Elementary</b>	<b>REPORTED LOS Elementary</b>	<b>MINIMUM LOS Middle</b>	<b>REPORTED LOS Middle</b>	<b>MINIMUM LOS High</b>	<b>REPORTED LOS High</b>
	26	22.0	26	20.1	32	32.9

\* The District determines the reported 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. Portables are not included in this analysis.

**SECTION 3  
CAPITAL FACILITIES INVENTORY**

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

**A. Schools**

The District maintains four elementary schools, two middle schools, one high school, an alternative high school, and the Stillaguamish Valley School (a Home-School Support center). Elementary schools currently accommodate grades K-5, the middle schools serve grades 6-8, and the high school and alternative high school provide for grades 9-12. The Stillaguamish Valley School serves grades K-12.

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

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

**Table 1  
Elementary School 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>
Eagle Creek	23.70	57,362	28	630	1989
Kent Prairie	10.10	57,362	28	630	1993
Presidents	12.40	60,977	31	680	2004
Pioneer	20.60	61,530	25	562	2002
<b>TOTAL</b>	<b>66.62</b>	<b>237,231</b>	<b>112</b>	<b>2,502</b>	

**Table 2  
Middle School Inventory**

<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>
Post Middle	24.60	76,323	36	757	1993
Haller Middle	25.46	86,002	31	612	2006
<b>TOTAL</b>	50.06	162,325	67	1,369	

\*Includes a total of six special education classrooms between both schools.

**Table 3  
High School Inventory**

<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>
Arlington High	54.00	256,181	53	1,780	2003

**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 eleven relocatable classrooms at various school sites throughout the District to provide additional interim capacity (an additional 10 relocatables are located at Stillaguamish Valley School). A typical relocatable classroom can provide capacity for a full-size class of students. The District's relocatable classrooms have adequate useful remaining life and are evaluated regularly. Current use for the 2020-19 school year of relocatable classrooms throughout the District is summarized in Table 4.

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

<b>Elementary School</b>	<b>Relocatables</b>	<b>Interim Capacity</b>
Eagle Creek	2	58
Kent Prairie	4	84
Presidents	2	58
<b>Middle School</b>	<b>Relocatables</b>	<b>Interim Capacity</b>
Post Middle	4	113
<b>High School</b>	<b>Relocatables</b>	<b>Interim Capacity</b>
Arlington High	1	32
<b>TOTAL</b>	13	345

**C. Support Facilities**

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

**Table 5  
Support Facility Inventory**

<b>Facility</b>	<b>Building Area (Square Feet)</b>	<b>Site Location</b>
Administration and Special Programs	21,402	Roosevelt Building, Presidents
Transportation	41,550	Leased
Support Services	70,991	Old HS "A" Bldg

**D. Land Inventory & Other Facilities**

The District owns the following undeveloped sites:

- A 167-acre site ("Hwy 530 Site") located 1.5 miles from the city limits of Arlington adjacent to SR 530. The property is outside of the Urban Growth Area boundary and not serviced by municipal utilities. The District is currently negotiating a sale of this property.
- Seven sites ranging from 25 to 160 acres that are managed as forest land by a forestland manager and generally topographically unsuitable for school site development.
- An additional 58.9 acres at the Post Middle School site of farmland located in a floodplain and therefore unsuitable for development.

The District owns the "A" Building on the former high school campus. The "A" Building has been taken out of educational use and is no longer eligible (by OSPI) for use as for classroom space.

The Stillaguamish Valley School, which supports home-schooled students, is located on the Eagle Creek Elementary site. This facility consists of 10 portable classrooms and is not considered part of the District's permanent facility capacity.

Additionally, the District leases a 33,000 square foot building on a 10 acre site near the Arlington Airport. This remodeled building houses the (alternative) Weston High School. Since this site houses only alternative educational programs, the building's capacity is not included as part of the District's eligible facility inventory<sup>1</sup>.

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<sup>1</sup> Students enrolled in these alternative programs are not included in enrollment numbers for the purposes of this CFP update.

**SECTION 4  
STUDENT ENROLLMENT PROJECTIONS**

**A. Projected Student Enrollment 2020-2025**

Enrollment projections are most accurate for the initial years of the forecast period. In the past, the District has used the methodology from the Office of Superintendent of Public Instruction (OSPI) to determine enrollment projections. The cohort survival method uses historical enrollment data to forecast the number of students who will be attending school the following year. It uses a weighted average of the most recent years to project enrollment. The District has adjusted the OSPI projections to reflect the District’s full-time equivalent enrollment (reduction of students enrolled but not housed in District facilities). Based on this methodology, a total of 828 FTE students are expected to be added to the District by 2025 - an increase of 14.8% over 2019 enrollment levels.

OFM population-based enrollment projections were estimated for the District using OFM population forecasts as adopted by Snohomish County. Between 2014 and 2019, the District’s enrollment constituted 17.2% of the total population in the District. Assuming that between 2020 and 2025 the District’s enrollment will constitute 17.2% of the District's total population and using OFM/County data, a total enrollment of 6,159 FTE is projected in 2025. *See Appendix A.*

**Table 6  
Projected Student Enrollment  
2025-2025**

								<b>Change</b>	<b>% Change</b>
<b>Projection</b>	<b>2019*</b>	<b>2020</b>	<b>2021</b>	<b>2022</b>	<b>2023</b>	<b>2024</b>	<b>2025</b>	<b>19-25</b>	<b>19-25</b>
District/OSPI	5,581	5,690	5,843	5,972	6,083	6,279	6,409	828	14.8%
OFM/County	5,581	5,677	5,773	5,869	5,965	6,061	6,159	578	10.4%

\* Actual October 2019 FTE enrollment

The District uses the adjusted OSPI cohort survival projections for purposes of predicting enrollment during the six years of this Plan. The District will monitor actual enrollment over the next two years and, if necessary, make appropriate adjustments in the next Plan update.

**B. 2035 Enrollment Projections**

Student enrollment projections beyond 2025 are highly speculative. Based on OFM/County data for 2025 and an estimated student-to-population ratio of 17.2%, 6,800 FTE students are projected for 2035. The total enrollment estimate was broken down by grade span to evaluate long-term site acquisition needs for elementary, middle, and high school facilities. Enrollment by grade span was determined based on recent and projected enrollment trends at the elementary, middle school, and high school levels.

Projected enrollment by grade span for the year 2035<sup>2</sup> is provided in Table 7. Again, these estimates are highly speculative and are used only for general planning purposes.

**Table 7**  
**Projected Student Enrollment**  
**(Ratio Method – OFM/County)**  
**2035**

<b>Grade Span</b>	<b>Projected Enrollment</b>
Elementary (K-5)	3,060
Middle School (6-8)	1,632
High School (9-12)	2,108
<b>TOTAL (K-12)</b>	<b>6,800</b>

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<sup>2</sup> Snohomish County Planning & Development Services provided the underlying data for the 2035 projections.

**SECTION 5  
CAPITAL FACILITIES NEEDS**

Projected available student capacity was derived by subtracting projected student enrollment from existing school capacity (excluding relocatable classrooms) for each of the six years in the forecast period (2020-2025). Capacity needs are expressed in terms of “unhoused students.” Note that the identified capacity needs do not include growth-related capacity needs from recent development.

Table 8A below shows future capacity needs assuming no new construction during the planning period.

**Table 8A  
Future Capacity Needs**

<b>Grade Span</b>	<b>2025 Projected Unhoused Students - Total</b>	<b>2025 Projected Unhoused Students – Growth Post-2019</b>
Elementary (K-5)	533	517
Middle School (6-8)	136	136
High School (9-12)	89	89
<b>TOTAL (K-12)</b>	<b>758</b>	<b>742</b>

Projected student capacity is depicted on Table 8B. This is derived by applying the projected number of students to the projected capacity. Planned improvements (if any) by the District through 2025 are included in Table 8B. It is not the District’s policy to include relocatable classrooms when determining future capital facility needs; therefore interim capacity provided by relocatable classrooms (including additions and adjustments) 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 6 and the Financing Plan, Table 9.



**Table 8B**  
**Projected Student Capacity**  
**2020 - 2025**

**Elementary School Surplus/Deficiency**

<b>Elementary</b>	<b>2019</b>	<b>2020</b>	<b>2021</b>	<b>2022</b>	<b>2023</b>	<b>2024</b>	<b>2025</b>
Existing Capacity	2,502	2,502	2,502	2,502	2,502	2,502	2,502
Added Capacity							
Total Capacity	2,502	2,502	2,502	2,502	2,502	2,502	2,502
Enrollment	2,518	2,579	2,648	2,753	2,849	2,961	3,035
Surplus (Deficiency)	(16)	(77)	(146)	(251)	(347)	(459)	(533)

**Middle School Surplus/Deficiency**

<b>Middle</b>	<b>2019</b>	<b>2020</b>	<b>2021</b>	<b>2022</b>	<b>2023</b>	<b>2024</b>	<b>2025</b>
Existing Capacity	1,369	1,369	1,369	1,369	1,369	1,369	1,519
Added Capacity						150^	
Total Capacity	1,369	1,369	1,369	1,369	1,369	1,519	1,519
Enrollment	1,343	1,399	1,391	1,399	1,412	1,420	1,505
Surplus (Deficiency)	26	(30)	(22)	(30)	(43)	99	14

*^Replacement and Expansion of Post Middle School*

**High School Surplus/Deficiency**

<b>High</b>	<b>2019</b>	<b>2020</b>	<b>2021</b>	<b>2022</b>	<b>2023</b>	<b>2024</b>	<b>2025</b>
Existing Capacity	1,780	1,780	1,780	1,780	1,780	2,036	2,036
Added Capacity					256^		
Total Capacity	1,780	1,780	1,780	1,780	2,036	2,036	2,036
Enrollment	1,721	1,712	1,804	1,820	1,822	1,898	1,869
Surplus (Deficiency)	59	68	(24)	(40)	214	138	167

*^Arlington High School Addition*

## SECTION 6 CAPITAL FACILITIES FINANCING PLAN

### A. *Planned Improvements*

The District has identified several capacity projects within the six year planning period needed to meet growth-related needs:

#### Permanent Capacity Adding Projects:

- Replacement of Post Middle School with the addition of 150 new student seats.
- Expansion of Arlington High School would add 256 additional student seats.

#### Temporary Capacity Projects:

- The District plans to add portable facilities at the elementary level and potentially at other levels during the six year planning period of this CFP.

#### Property Acquisition:

- The District plans to acquire land for an elementary school site.

The District is also starting to plan for elementary capacity solutions as growth continues at that grade level. Future updates to the CFP will include any specifically planned projects.

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 school construction assistance program funds, and impact fees. Each of these funding sources is discussed in greater detail below.

## **B. *Financing Sources***

### **1. *General Obligation Bonds/Capital Levies***

Bonds are typically used to fund construction of new schools and other capital improvement projects, and require a 60% voter approval. Capital levies require a 50% voter approval and can be used for certain capital improvement projects. In February 2020, the District presented a \$25.1 million capital levy and \$107.5 million bond measure to its voters. The voters approved the capital levy, which includes, among other things, funding for the new classrooms and a science, technology, engineering, art and math (STEAM) workshop wing addition at Arlington High School. The bond proposal included funding for the construction of a new middle school to replace Post Middle School. The bond did not achieve the required 60% minimum for passage.

### **2. *State School Construction Assistance Funds***

State School Construction Assistance funds come from the Common School Construction Fund. The State deposits revenue from the sale of renewable resources from State school lands set aside by the Enabling Act of 1889 into the Common School Account. If these sources are insufficient to meet needs, the Legislature can appropriate General Obligation Bond funds or the Superintendent of Public Instruction can prioritize projects for funding. 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 school construction assistance funds at the 64.85% level for eligible projects.

### **3. *Impact Fees***

Impact fees are a means of supplementing traditional funding sources for construction of public facilities needed to accommodate new development.

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

Table 9 demonstrates how the District intends to fund new construction and improvements to school facilities for the years 2020-2025. The financing components include a capital levy funds, future bond revenue, impact fees, and other future sources. 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 Board of Directors is considering options for funding the needed Post Middle School replacement/addition but has not made any decisions relative to the six year planning period of this CFP. However, the needs remain, as reflected in this CFP, and continue in the District's planning. The District will update the CFP as needed, including consideration of an interim update, to reflect updated planning decisions.

**Table 9  
Capital Facilities Financing Plan**

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

Project	2020	2021	2022	2023	2024	2025	Total Cost	Bonds/ Levy/Other Local	State Match	Impact Fees
<b>Elementary</b>										
Potential Property Purchase							TBD	X		X
<b>Middle School</b>										
Post Middle School Replacement and Expansion			\$27.666	\$27.666	\$27.666		\$83.000	X	X	X
<b>High School</b>										
Arlington High School Expansion	\$1.00	\$1.00	\$6.186				\$8.186	X		X

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

Project	2020	2021	2022	2023	2024	2025	Total Cost	Bonds/ Levy/Other Local	State Match	Impact Fees
Relocatables		\$0.600	\$0.600	\$0.600			\$1.800	X		X

**Noncapacity Improvements (Costs in Millions)**

Project	2020	2021	2022	2023	2024	2025	Total Cost	Bonds/ Levy/Other Local	State Match	Impact Fees
<b>Various Schools (all grade levels)</b>										
Security improvements; pedestrian safety improvements; energy efficiency measures; miscellaneous improvements	\$5.259	\$7.560	\$4.298				\$17.117	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 and the City of Arlington’s impact fee programs require school districts to prepare and adopt CFPs meeting the specifications of the GMA. Impact fees are calculated in accordance with the formula, which are based on projected school facility costs necessitated by new growth and are contained in the District’s CFP.

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

Impact fees 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.

A student factor (or student generation rate) is used to identify the average cost per dwelling unit by measuring the average number of students generated by each housing type (single-family dwellings and multi-family dwellings of one bedroom and two bedrooms or more). A description of the student methodology is contained in Appendix B. The District has in recent years identified some volatility in the Multi-Family 2+ bedroom student generation rates given the small number of units in the data set. In order to control for that volatility in this CFP and until more consistent District-specific demographic information is available, the District has

calculated Multi-Family 2+ BR student generation rates using the countywide average of the corresponding rates published in the 2018 capital facilities plans (the last County-adopted set of plans) of the other school districts in Snohomish County. These averages reflect recent development trends in Snohomish County which will likely influence any multi-family construction that occurs in the District in the near term. King County recognizes countywide averages as a reasonable approach to calculating student generation rates when there is a lack of sufficient development data within a school district. See KCC 21A.06.1260.

The resulting average student generation rates are as follows:

<b>Multi-Family 2+ BR Rates</b>	<b>K-5</b>	<b>6-8</b>	<b>9-12</b>
	<b>0.171</b>	<b>0.099</b>	<b>0.108</b>

As required under the GMA, credits are applied in the formula to account for State School Construction Assistance 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 8-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 9 for a complete identification of funding sources.

The following projects are included in the impact fee calculation:

- A capacity addition at Arlington High School.
- A capacity addition at the replacement Post Middle School

Please see Table 11 for relevant cost data related to each capacity project.

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

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

**Table 10  
School Impact Fees  
2020**

<b>Housing Type</b>	<b>Impact Fee Per Dwelling Unit</b>
Single Family	\$3,811
Multi-Family (1 Bedroom)	No fee (\$0)
Multi-Family (2+ Bedroom)	\$3,455

*Table 10 reflects a 50% adjustment to the calculated fee as required by local ordinances.*

**Table 11: Impact Fee Variables**

<b>Student Generation Factors – Single Family</b>			<b>Average Site Cost/Acre</b>	N/A
Elementary		.294		
Middle		.126		
Senior		.175		
<b>Total</b>		<b>.595</b>		
<b>Student Generation Factors – Multi Family (1 Bdrm)</b>			<b>Temporary Facility Capacity</b>	22
Elementary		.000	Capacity	
Middle		.000	Cost	\$300,000
Senior		.000		
<b>Total</b>		<b>.000</b>		
<b>Student Generation Factors – Multi Family (2+ Bdrm)**</b>			<b>State Match Credit</b>	64.85%
Elementary		.171	Current State Match Percentage	
Middle		.099		
Senior		.108		
<b>Total</b>		<b>.378</b>		
<b>Projected Student Capacity per Facility</b>			<b>Construction Cost Allocation</b>	238.22
Arlington HS (expansion) - 256			Current CCA	
Post Middle School (replacement and expansion) – 150 added capacity (for total new capacity of 907)				
<b>Required Site Acreage per Facility</b>			<b>District Average Assessed Value</b>	\$403,171
<b>Facility Construction/Cost Average</b>			Single Family Residence	
Arlington HS (expansion)		\$8,186,671		
Post Middle School (repl/expansion)		\$83,000,0000		
<b>Permanent Facility Square Footage</b>			<b>District Average Assessed Value</b>	\$125,314
Elementary		237,231	Multi Family (1 Bedroom)	
Middle		162,325	Multi Family (2+ Bedroom)	\$178,051
Senior		256,181		
<b>Total</b>	<b>98.61%</b>	<b>655,737</b>		
<b>Temporary Facility Square Footage</b>			<b>SPI Square Footage per Student</b>	90
Elementary		5,034	Elementary	
Middle		3,356	Middle	108
Senior		839	High	130
<b>Total</b>	<b>1.39%</b>	<b>9,229</b>		
<b>Total Facility Square Footage</b>			<b>District Debt Service Tax Rate for Bonds</b>	\$1.039
Elementary		242,265	Current/\$1,000	
Middle		165,681		
Senior		257,020		
<b>Total</b>	<b>100.00%</b>	<b>664,966</b>	<b>General Obligation Bond Interest Rate</b>	2.44%
			Current Bond Buyer Index	
			<b>Developer Provided Sites/Facilities</b>	
			Value	0
			Dwelling Units	0

\*\*Uses 2018 Snohomish County average (see pages 19-20).



**APPENDIX A**

**POPULATION AND ENROLLMENT DATA**



School Facilities and Organization  
 INFORMATION AND CONDITION OF SCHOOLS  
 Enrollment Projections (Report 1049)

Snohomish/Arlington(31016)

Grade	--- ACTUAL ENROLLMENTS ON OCTOBER 1st ---						AVERAGE % SURVIVAL	--- PROJECTED ENROLLMENTS ---					
	2014	2015	2016	2017	2018	2019		2020	2021	2022	2023	2024	2025
Kindergarten	353	362	355	390	386	426		426	439	453	466	480	493
Grade 1	365	385	383	375	409	403	105.95%	451	451	465	480	494	509
Grade 2	423	375	396	394	394	414	102.94%	415	464	464	479	494	509
Grade 3	392	433	381	415	423	406	103.83%	430	431	482	482	497	513
Grade 4	389	387	429	409	423	432	101.83%	413	438	439	491	491	506
Grade 5	423	401	382	452	424	437	102.82%	444	425	450	451	505	505
Grade 6	407	439	428	417	473	441	105.66%	462	469	449	475	477	534
<b>K-6 Sub-Total</b>	<b>2,752</b>	<b>2,782</b>	<b>2,754</b>	<b>2,852</b>	<b>2,932</b>	<b>2,959</b>		<b>3,041</b>	<b>3,117</b>	<b>3,202</b>	<b>3,324</b>	<b>3,438</b>	<b>3,569</b>
Grade 7	434	414	448	443	416	486	101.95%	450	471	478	458	484	486
Grade 8	433	429	416	440	458	416	100.18%	487	451	472	479	459	485
<b>7-8 Sub-Total</b>	<b>867</b>	<b>843</b>	<b>864</b>	<b>883</b>	<b>874</b>	<b>902</b>		<b>937</b>	<b>922</b>	<b>950</b>	<b>937</b>	<b>943</b>	<b>971</b>
Grade 9	434	450	453	427	457	489	104.55%	435	509	472	493	501	480
Grade 10	440	445	455	444	435	463	100.96%	494	439	514	477	498	506
Grade 11	463	427	408	429	422	402	94.09%	436	465	413	484	449	469
Grade 12	450	473	444	421	430	431	102.33%	411	446	476	423	495	459
<b>9-12 Sub-Total</b>	<b>1,787</b>	<b>1,795</b>	<b>1,760</b>	<b>1,721</b>	<b>1,744</b>	<b>1,785</b>		<b>1,776</b>	<b>1,859</b>	<b>1,875</b>	<b>1,877</b>	<b>1,943</b>	<b>1,914</b>
<b>DISTRICT K-12 TOTAL</b>	<b>5,406</b>	<b>5,420</b>	<b>5,378</b>	<b>5,456</b>	<b>5,550</b>	<b>5,646</b>		<b>5,754</b>	<b>5,898</b>	<b>6,027</b>	<b>6,138</b>	<b>6,324</b>	<b>6,454</b>

Notes: Specific subtotalling on this report will be driven by District Grade spans.

**APPENDIX B**

**STUDENT GENERATION FACTOR REVIEW**

## **Student Generation Rate Study for the Arlington School District 3/20/2020**

This document describes the methodology used to calculate student generation rates (SGRs) for the Arlington 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 Arlington School District from January 2012 through December 2018. 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 Arlington School District as of March 2020. 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 635 single family detached units were compared with data on 5,748 students registered in the District, and the following matches were found by grade level(s)\*:

GRADE(S)	COUNT OF MATCHES	CALCULATED RATE
K	41	0.065
1	28	0.044
2	26	0.041
3	27	0.043
4	26	0.041
5	39	0.061
6	29	0.046
7	23	0.036
8	28	0.044
9	32	0.050
10	33	0.052
11	19	0.030
12	27	0.043
K-5	187	0.294
6-8	80	0.126
9-12	111	0.175
K-12	378	0.595

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 20 multi-family 2+ BR units were compared with data on 5,748 students registered in the District, and the following matches were found by grade level(s)\*:

GRADE(S)	COUNT OF MATCHES	CALCULATED RATE
K	1	0.050
1	0	0.000
2	0	0.000
3	0	0.000
4	0	0.000
5	0	0.000
6	0	0.000
7	0	0.000
8	0	0.000
9	1	0.050
10	1	0.050
11	0	0.000
12	0	0.000
K-5	1	0.050
6-8	0	0.000
9-12	2	0.100
K-12	3	0.150

6. **Multi-Family 0-1 BR Rates:** Research indicated that 4 multi-family 0-1 BR units were constructed within District boundaries during the time period covered by this study. No specific unit number matches were made.

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

	K-5	6-8	9-12	K-12
Single Family	.294	.126	.175	.595
Multi-Family 2+ BR	.050	.000	.100	.150

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

\*\*See pages 19-20 of the CFP for more information related to the Multi-Family 2+ Bedroom student generation rates used in this CFP.

**APPENDIX C**

**SCHOOL IMPACT FEE CALCULATIONS**

<b>SCHOOL IMPACT FEE CALCULATIONS</b>									
DISTRICT	Arlington School District								
YEAR	2020								
<b>School Site Acquisition Cost:</b>									
((AcresxCost per Acre)/Facility Capacity)xStudent Generation Factor									
	Facility	Cost/	Facility	Student	Student	Student	Cost/	Cost/	Cost/
	Acreage	Acre	Capacity	SFR	MFR (1)	MFR (2+)	SFR	MFR (1)	MFR (2+)
Elementary	10.00	\$ -	550	0.294	0.000	0.171	\$0	\$0	\$0
Middle	20.00	\$ -	907	0.126	0.000	0.099	\$0	\$0	\$0
High	40.00	\$ -	256	0.175	0.000	0.108	\$0	\$0	\$0
						<b>TOTAL</b>	<b>\$0</b>	<b>\$0</b>	<b>\$0</b>
<b>School Construction Cost:</b>									
((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	98.61%	\$ -	550	0.294	0.000	0.171	\$0	\$0	\$0
Middle	98.61%	\$ 83,000,000	907	0.126	0.000	0.099	\$11,370	\$0	\$8,934
High	98.61%	\$ 8,186,671	256	0.175	0.000	0.108	\$5,519	\$0	\$3,406
						<b>TOTAL</b>	<b>\$16,889</b>	<b>\$0</b>	<b>\$12,339</b>
<b>Temporary Facility Cost:</b>									
((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	1.39%	\$ 150,000.00	22	0.294	0.000	0.171	\$28	\$0	\$16
Middle	1.39%	\$ -	28	0.126	0.000	0.099	\$0	\$0	\$0
High	1.39%	\$ -	30	0.175	0.000	0.108	\$0	\$0	\$0
						<b>TOTAL</b>	<b>\$28</b>	<b>\$0</b>	<b>\$16</b>
<b>State School Construction Funding Assistance Credit:</b>									
CCA X SPI Square Footage X District Funding Assistance % X Student Factor									
	CCA	SPI	Funding	Student	Student	Student	Cost/	Cost/	Cost/
		Footage	Asst %	SFR	MFR (1)	MFR (2+)	SFR	MFR (1)	MFR (2+)
Elementary	\$ 238.22	90	0.00%	0.294	0.000	0.171	\$0	\$0	\$0
Middle	\$ 238.22	108	64.85%	0.126	0.000	0.099	\$2,102	\$0	\$1,652
High	\$ 238.22	130	64.85%	0.175	0.000	0.108	\$3,515	\$0	\$2,169
						<b>TOTAL</b>	<b>\$5,617</b>	<b>\$0</b>	<b>\$3,821</b>
<b>Tax Payment Credit:</b>									
	Average Assessed Value						SFR	MFR (1)	MFR (2+)
	Capital Bond Interest Rate						\$403,171	\$125,314	\$178,051
	Net Present Value of Average Dwelling						2.44%	2.44%	2.44%
	Years Amortized						\$3,539,544	\$1,100,164	\$1,563,156
	Property Tax Levy Rate						10	10	10
	Present Value of Revenue Stream						\$1.04	\$1.04	\$1.04
							<b>\$3,678</b>	<b>\$1,143</b>	<b>\$1,624</b>
<b>Fee Summary:</b>									
				Single	Multi-	Multi-			
				Family	Family (1)	Family (2+)			
	Site Acquisition Costs			\$0	\$0	\$0			
	Permanent Facility Cost			\$16,889	\$0	\$12,339			
	Temporary Facility Cost			\$28	\$0	\$16			
	State SCFA Credit			(\$5,617)	\$0	(\$3,821)			
	Tax Payment Credit			(\$3,678)	(\$1,143)	(\$1,624)			
	FEE (AS CALCULATED)			\$7,622	(\$1,143)	\$6,911			
	<b>FEE (AS DISCOUNTED)</b>			<b>\$3,811</b>	<b>\$0</b>	<b>\$3,455</b>			





MEADOWDALE MIDDLE SCHOOL

# 2020-2025 CAPITAL FACILITIES PLAN



**Edmonds**  
SCHOOL DISTRICT

Each student learning, every day!

# **CAPITAL FACILITIES PLAN EDMONDS SCHOOL DISTRICT**

## **SCHOOL BOARD MEMBERS**

**Deborah Kilgore, President**

Director District 4

**Gary Noble, Vice President**

Director District 3

**Carin Chase, Legislative Representative**

Director District 1

**Ann McMurray**

Director District 2

**Nancy Katims**

Director District 5

**SUPERINTENDENT  
Dr. Gustavo Balderas**

**Adopted by Board of Directors, September 8, 2020**

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 eighteen years. It also meets the planning requirements of the State Growth Management Act and the County's GMA Comprehensive Plan (SCC 30.66C). A more detailed schedule and financing program for capital improvements over the next six years, (2020-2025) 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.

Cities within ESD #15 include Brier, Edmonds, Lynnwood, Mountlake Terrace, and Woodway. Upon adoption of this CFP by Snohomish County each City may be asked to adopt it as well.

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. Impact fees are not anticipated during this 2020-2025 planning period. Should available funding fall short of meeting existing capital facility needs, the District will, first, assess its ability to meet its Planning Objectives (See below) and Educational Service Standards (Section 3) by reconfiguring schools or attendance boundaries or other methods discussed in this report. If those strategies are unsuccessful, GMA rules allow the County to reassess the land use element of its comprehensive plan to ensure that land use, development and the CFP, are coordinated and consistent.

If impact fees are deemed desirable as part of this strategy, the District may request an amendment to this CFP during the 2021-22 biennium.

## Overview of Edmonds School District

The District is the largest school district in the County, and the eleventh largest of Washington's 294 public school systems. The District covers an area of 36 square miles. The District currently serves a total student population (headcount, including Kindergarten) of 20,238<sup>1</sup> (as of October 2019) 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, one e-learning program, 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 Capital Facilities Plan is to assess existing school facility capacities, forecast future facility needs within six-year and approximate twenty-year planning horizons, and to articulate a facility and financing plan to address those needs. This CFP replaces and supersedes the District's 2018 Capital Facilities Plan. The current projections cycle is 2020 to 2025.

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. 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 with resulting issues of congestion and affordability occurring. 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.

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<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 students who attend part time. Office of the Superintendent of Public Instruction Report No. 1251 H, (December, 2017)

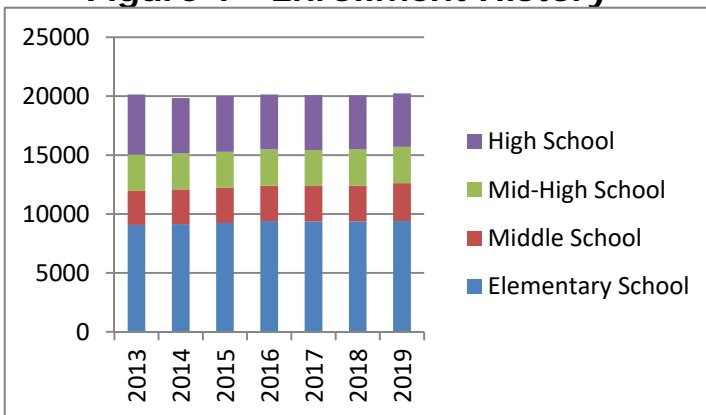
The CFP records and documents how the District utilizes its educational facilities given current District enrollment configurations, educational program standards and locations, fixed capital facilities, and known capital funding sources. Using this information as a platform to look into the future,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

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. 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**

**Figure 1 - Enrollment History**



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 gradually declined until 2012. Since then, increasing residential development has pushed enrollment above 20,000. Enrollment in October 2019 was 20,238.

**Forecast 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 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”).

In previous capital facility plans, one of two forecast methodologies were used: one from Edmonds School District; and a second from the Washington State Office of Superintendent of Public Instruction, (OSPI). In January 2019 the latest of several enrollment studies was presented<sup>2</sup> to the District with enrollment forecasts through 2025, increasing to 21,653 from a 2018 figure of 20,325. A previous (April 2018) study by the District’s Bond Committee had estimated a 2017 enrollment of 22,153

For this Capital Facilities Plan, the 2019 FLO Analytics enrollment forecasts have been used. Its plan is used by the District for its ongoing planning work. Its estimates are compared with the other two methods on Table 1.

### **Projected Student Enrollment 2019 -2025**

According to the FLO Analytics study (2019), total enrollment is expected to increase by 1,049 students by the year 2025, an increase of 5.1% from existing levels. Based on OSPI projections, which include the *actual* 2019 enrollment count, the District would be expected to grow by 4.1%. The 2018 Kendrick Study estimated a 22,583 enrollment. These are shown in Table 1 and Figure 2.

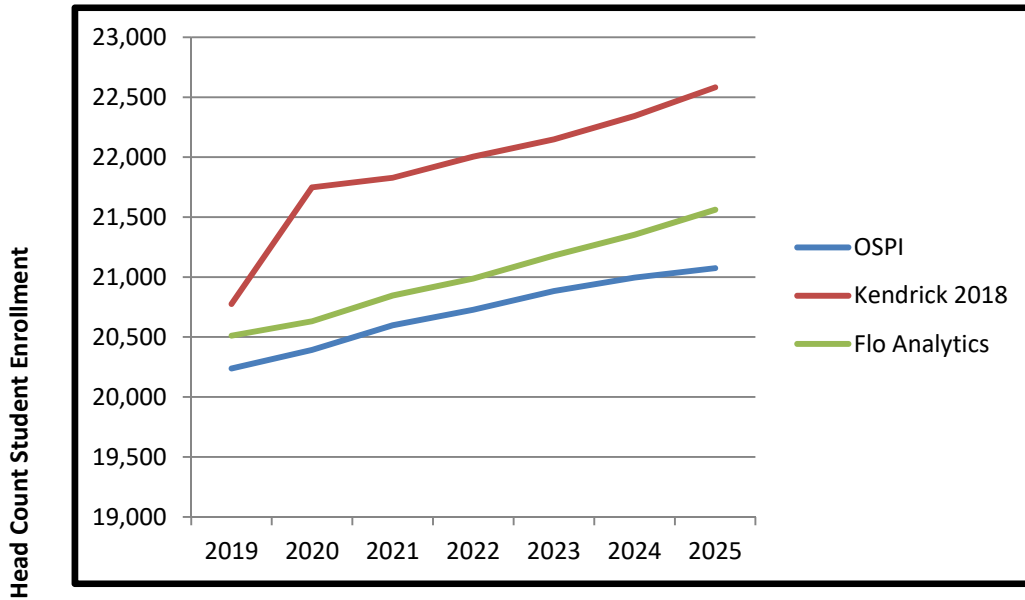
**Table 1 — Comparison of Student Enrollment Projections  
Edmonds School District 2019-2025**

Source	2019	2020	2021	2022	2023	2024	2025	% Inc.
<b>OSPI</b>	20,238	20,392	20,598	20,727	20,883	20,996	21,075	4.1%
<b>Kendrick 2018</b>	20,776	21,749	21,828	22,005	22,149	22,343	22,583	8.6%
<b>Flo Analytics</b>	20,512	20,632	20,846	20,988	21,180	21,353	21,562	5.1%

<sup>2</sup> Memorandum: Jerry Oelerich, FLO Analytics, to Steward Mhyre, January 4, 2019.



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



**Table 2 — Projected Student Enrollment by Grade Span  
Edmonds School District 2019-2025**

Grade Span	Actual	Projected						Change 2019-25	% Change
		2019	2020	2021	2022	2023	2024		
Elementary (K-6)	11,147	11,164	11,275	11,310	11,442	11,597	11,697	515	4.9%
Middle School (7-8)	3,093	3,208	3,232	3,210	3,204	3,135	3,222	129	4.2%
High School (9-12)	6,272	6,260	6,340	6,467	6,533	6,622	6,643	371	5.9%
<b>Total</b>	<b>20,512</b>	<b>20,632</b>	<b>20,846</b>	<b>20,988</b>	<b>21,180</b>	<b>21,353</b>	<b>21,562</b>	<b>1,049</b>	<b>5.1%</b>

FLO Analytics 2020

### 2038 Student Enrollment Projection

In 2018 an appointed Enrollment Committee issued a report estimating future enrollments through the year 2038. These estimates are used by the District in its long range facility plan. At the same time, the District acknowledges the County's capital facilities plan process under SCC 30.66C. Extrapolation of the District's 2038 estimate back to the County's 2035 population estimate is shown on Table 3. The District

enrollment estimate (22,762) as a percentage of the County's total population estimate for 2035 (203,942) is 11.16%. This compares with recent population/enrollment ratios of about 11.50%, a difference of about 700 students. As a comparison between two separate documents estimating enrollments fifteen years into the future, the 3% difference is considered negligible. The District Enrollment Committee estimates are used in this CFP.

**Table 3 — Projected Student Enrollment Through 2038**

<b>Grade Span</b>	<b>2025 Projected Student Headcount (District)</b>	<b>2035 Projected Student Headcount (District)</b>	<b>2038 Projected Student Headcount (District)</b>
<b>Elementary (K-6)</b>	11,697	12,273	12,446
<b>Middle School (7-8)</b>	3,222	3,411	3,468
<b>High School (9-12)</b>	6,643	7,078	7,208
<b>Total</b>	<b>21,562</b>	<b>22,762</b>	<b>23,122</b>

Medium Growth Model: Source: W. Les Kendrick, February 2018; FLO Analytics, 2020

### **Student Generation Rates**

Student Generation Rates (SGR's) are the average number of students by grade span (elementary, middle, 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. For this CFP estimates of rates were provided in the Flow Analytics report. The 2018 Kendrick Update (Page 40) reported an estimated SGR of about .32 students for each new home and .14 students per apartment.

The purpose of SGR's in the Capital Facilities Plan is primarily to assist districts with the calculation of school impact fees. The Edmonds School District does not charge impact fees at this time. However, based on future growth in the District, this may change. Updated student generation numbers will be provided at that time.

### 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, intervention programs, 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, 24 students for grades 2-6.
- 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 capacity for new elementary schools is based upon a District-wide Educational Specification which assigns a range of approximately 21-27 classrooms for K-6 or K-8 basic educational program and two or more classrooms for self-contained resource or program-specific activities.
- The actual capacity of individual schools may be lower than the maximum 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 to be approximately 90%.

### **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 rates 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 up 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 or continue adding relocatable classrooms.

- Actual capacity and actual enrollment of individual schools may vary. Actual capacity may be lower than the design might suggest 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 4 to determine existing and future capacities.

### **Minimum Levels of Service**

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

With a total of 616 classrooms, the District could accommodate 11,075 elementary school children based upon current maximum capacity.

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

With a total of 151 teaching stations, the District could accommodate 3,370 seventh and eighth graders in its K-8 and Middle Schools based on actual maximum capacity.

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

With a total of 272 teaching stations, the District could accommodate 6,649 high school students based upon actual maximum capacity.

## 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.

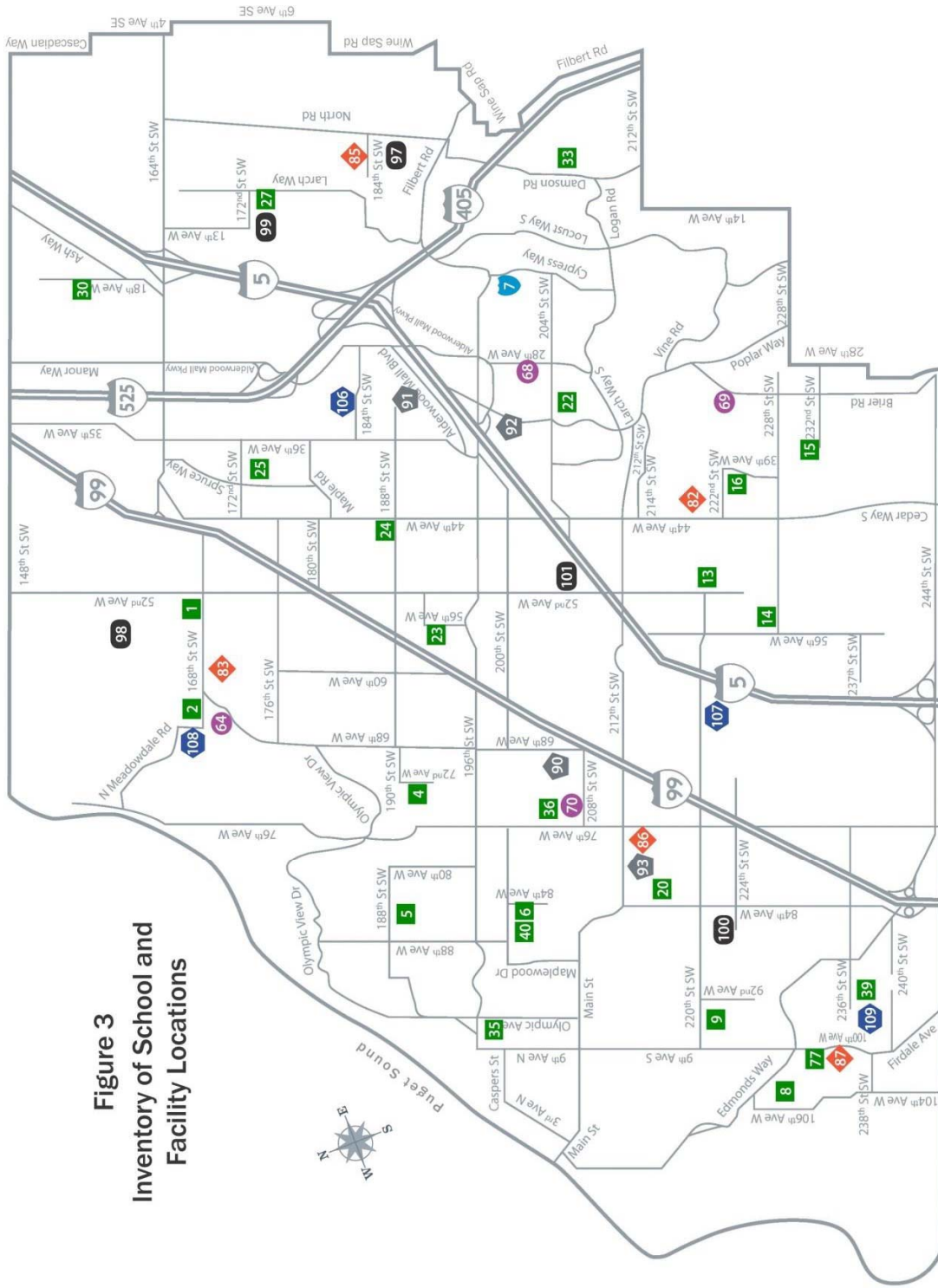
### Schools

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 e-learning program;
- One former elementary school and one former middle school as reserve facilities for schools being displaced due to construction or remodeling.

Edmonds offers a District program, Maplewood, 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 challenges.

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



**Figure 3  
Inventory of School and  
Facility Locations**

## Edmonds School District

### District Support Sites

- 90 - ESC - Educational Services Center
- 92 - Warehouse
- 93 - Stadium
- 101 - New Transportation Maintenance

### Undeveloped Parcels

- 96 - Site 29 (P & S agreement)
- 97 - Site 28
- 98 - Site 32
- 100 - Chase Lake Bog

### Developed Parcels

- 68 - Alderwood Middle
- 91 - Transportation/Maintenance (for sale)
- 106 - Former Lynnwood High School
- 107 - Former Melody Hill Elementary (for sale)
- 108 - Meadowdale Playfields
- 109 - Former Woodway Elementary

### 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
- 69 - Brier Terrace Middle
- 70 - College Place Middle
- 99 - Alderwood 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

### Recently Sold

- 95 - Esperance, sold 2015
- 105 - Civic Field, sold 2016
- 111 - Former ESC, Educational Services Center, sold 2015
- 110 - Former Evergreen Elementary, sold 2016



## **Program Improvements and Population Growth**

Since 2016, the State of Washington employs an all-day kindergarten model. The State has also lowered funded teacher ratios in grades K-3 to 17:1. The District has identified a need to support students who are identified with an IEP, 504, or ELL by adding additional teaching staff. This will put increasing pressure on capacity. This change brought about a need for additional space. The District has added 37 relocatable classrooms since 2014. While this is a response to total additional space requirements, the assignment of how and what grade levels will use these remains flexible.

The District has re-evaluated the relationship between classrooms and how buildings have 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 amends the traditional classroom model through the use of smaller instructional spaces to provide enhanced opportunity for learning. This process has been on-going for many years and is a fluid and flexible model to enhance the quality and amount of small group or one-on-one time with students.

Previously, the District has measured basic education capacity by determining how, on average, rooms are assigned during the day. This assumes 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 is then reduced accordingly to determine the basic educational capacity of a school.

A more accurate descriptor, the teaching station, has been recognized at the secondary 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 and 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 where the District has not previously listed the number of teaching stations for all buildings. Secondary schools constructed since 2009 and those under construction or in the planning stages will be built to accommodate this shift from the traditional classroom model.

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.

## **Measures of Capacity**

The OSPI 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>3</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 based on projected student enrollment.

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<sup>3</sup>WAC 392-343-035 Space Allocation

**Table 4 – Elementary School Capacity Inventory**

Elementary School	Site Size Acres	Bldg. Area (Sq. Ft.)	Year Built or Last Remodel	Total Class Rooms	Max Student Capacity	90% Program Capacity	Future Capacity Improvements ***	Meets Facility Service Standard
Alderwood	8.9	36,869	1965	20	n/a*	n/a*		
Beverly	9.1	48,020	1988	29	575	518	TBD	
Brier	10.0	43,919	1989	25	456	410		
Cedar Valley	22.1	64,729	2001	25	449	404		
Cedar Way	9.4	53,819	1993	26	488	439		
Chase Lake	10.3	57,697	2000	25	451	406		
College Place	9.0	48,180	1968	27	504	454		
Edmonds	8.4	34,726	1966	20	358	322		
Hazelwood	10.3	51,453	1987	28	519	467		
Hilltop	9.8	49,723	1967	29	562	506		
Lynndale	10.0	69,045	2016	26	582	524		
Lynnwood	8.9	81,405	2018	27	618	556		
Madrona K-8	26.9	78,930	2018	28	485	437		
Maplewood K-8	7.4	76,554	2002	27	375	338		
Martha Lake	10.0	50,753	1993	26	462	416		
Meadowdale	9.1	57,111	2000	25	455	410		
Mountlake Terrace	8.0	67,379	2018	21	486	437		
Oak Heights	9.4	49,355	1966	30	528	475	TBD	
Seaview	8.3	49,420	1997	22	396	356		
Sherwood	13.6	43,284	1966	24	526	473		
Spruce	8.9	71,742	1966	28	642	578	184	
Terrace Park	15.3	71,664	2002	33	678	610		
Westgate	8.1	44,237	1989	25	480	432		
Woodway	13.1	37,291	1962	20	n/a**	n/a**		
New Elementary							550	
<b>Totals</b>	<b>264.3</b>	<b>1,337,305</b>		<b>616</b>	<b>11,075</b>	<b>9,968</b>		

Source: Facilities Operations Department, Edmonds School District, OSPI  
 \* Alderwood Early Childhood Center serves Pre-K developmentally challenged children and is not included in total program capacity calculations for K-12 purposes  
 \*\* Woodway is a reserve campus.  
 \*\*\* Future improvements are as currently planned by District. Funding is not currently available  
 (See Discussion of Six Year Plan and Table 12.)

**Table 5 — Middle School Capacity Inventory**

Middle School	Site Size (Acres)	Building Area (Sq. Ft.)	Year Built or Last Remodel	Teaching Stations	Max Student Capacity (3)	Program Capacity 83%	Future Capacity Improvements (4)	Meets Facility Service Standard
Alderwood	18.9	114,400	2016	38	800	664		
Brier Terrace	22.7	89,258	1969	38	785	652		
College Place	18.7	87,031	1970	40	765	635	75	
Meadowdale	20.7	102,925	2011	35	750	622		
Madrona – 7 & 8 (1)					150	125		
Maplewood – 7 & 8 (2)					120	100		
New							900	
<b>Totals</b>	<b>81</b>	<b>393,614</b>		<b>151</b>	<b>3,370</b>	<b>2,798</b>		

Source: Facilities Operations Department, Edmonds School District

District Notes:

(1) Madrona K-8: Grades 7 and 8  
(2) Maplewood K-8: Grades 7 and 8  
(3) Maximum Capacity equals 90% utilization of total seats.  
(4) Future improvements are as currently planned by District. Funding is not currently available (See Discussion of Six Year Plan and Table 12.

**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	Program Capacity 83%	Meets Facility Service Standard
Edmonds-Woodway	28.5	208,912	1998	64*	1,539	1,277	
Lynnwood	40.5	217,597	2009	64	1,577	1,309	
Meadowdale	40.0	197,306	1998	59*	1,488	1,235	
Mountlake Terrace	33.2	211,950	1991	64*	1,541	1,279	
Innovative Learning Center (Proposed)	TBD						
<b>Totals</b>	<b>141.2</b>	<b>835,765</b>		<b>251</b>	<b>6,145</b>	<b>5,100</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 Woodway Campus. Scriber Lake to be replaced by Innovative Learning Center

## Relocatable 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.

As of September 1, 2019, there are a total of 50 relocatable classrooms to help with added enrollment, K-3 class reductions and all-day Kindergarten.

**Table 7 — Relocatable Classroom Inventory**

School	Single Unit	Double Unit	Available Classroom	Student Capacity
Alderwood Middle	2		2	48
Beverly Elementary	1	2	5	120
Cedar Way Elementary	4		4	96
College Place Elementary		1	2	48
Edmonds-Woodway High	1		1	24
Hazelwood Elementary	2		2	48
Hilltop Elementary	1	1	3	72
Meadowdale High	2	1	4	96
Oak Heights Elementary	7	1	9	216
Sherwood Elementary	6		6	144
Spruce Elementary	5		5	120
Westgate Elementary	3	1	5	120
Woodway Campus*	4		2	48
<b>Totals</b>	<b>38</b>	<b>7</b>	<b>50</b>	<b>1,200</b>

\*Two relocatable classrooms at Woodway Campus are used for non-educational purposes.

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	19.6
Warehouse	9,600	3.4
District Stadium	7,068	6.0

Source: Facilities Operations Department, Edmonds School District

## Land Inventory

### Undeveloped Sites

The District owns three undeveloped parcels varying in size from 7.5 to 9.5 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
Site 28	9.5	Vacant South of LHS	Sno Co	Residential R9600
Site 32	9.4	Vacant North of BEV	Sno Co	Residential R8400

### 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

**Table 10 – Inventory of Developed Sites**

Facility/Site	Acres	Status	Jurisdiction	Zoning
Former LHS	40.1	Leased	Lynnwood	Mixed Use Commercial
Meadowdale Playfields	21	Leased	Lynnwood	Public
Former Alderwood Middle School	18.9	Held in reserve	Lynnwood	RMM
Former Woodway Elementary School	13.1	Held in reserve	Edmonds	RS6000
Former Trans/Maint	9.1	Purchase and sale agreement	Lynnwood	Commercial

Source: Facilities Operations Department, Edmonds School District

## SECTION 5 -- PROJECTED FACILITY NEEDS

### Facility Needs Through 2038

Projected permanent student capacity was derived by subtracting projected student enrollment for each of the six years in the forecast period from the existing 2019 school maximum capacity as shown in Tables 4-6. As described above, the District counts relocatable (portable) classrooms (Table 7) in its facilities planning. The figures in Table 11 do not include those temporary capacity figures.

**Table 11 — Projected Maximum Available Student Capacity  
2019-2025  
(without Relocatable Classrooms)**

Grade Span	2019	2020	2021	2022	2023	2024	2025	2035	2038
	Elementary (K-6)	-72	-89	-200	-235	-367	-522	-622	-1,198
Middle School (7-8)	277	162	138	160	166	235	148	-41	-98
High School (9-12)	-127	-115	-195	-322	-388	-477	-498	-933	-1,063
<b>Total</b>	78	-42	-257	-397	-589	-764	-972	-2,172	-2,532

The District does have schools that are in need of rebuilding or remodeling within the long range planning horizon. When construction funding opportunities arise, the District may seek voter approval for capital construction funds and use revenues from real estate taxes.

Due to all day kindergarten, class reduction, and increasing enrollment, student capacity has seen a significant impact from previous years, putting elementary capacity in the negative territory.

## SECTION 6 -- PLANNED IMPROVEMENTS

In February 2020, the proposed Bond program did not receive the required super majority vote for Capital Construction funding to complete Spruce Elementary Phase 2, new middle school, new College Place Middle, new Oak Heights Elementary, new Beverly Elementary, new

Innovative Learning Center and multi-site renewal & upgrade projects. The additional capacity that would have been provided by these improvements are shown on Tables 4 and 5.

The 2020 Capital Construction Bond scope of work is discussed below. The majority of the capital construction would be focused, adding capacity, 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 2020 to 2026 period will see activity in the construction of a number of new sites. Over the last two and a half years the District has worked with its Enrollment Committee and Capital Facilities Bond Committee to evaluate needs and recommend projects to the Board of Directors. The Enrollment Committee recommended changing grade configurations to relieve overcrowding at the elementary grade level. This approach would require adding significant capacity at both the elementary and middle school grade levels. The Bond Committee identified \$1.7 Billion in priority facilities needs and recommended a \$600 Million initial construction program. Based on the recommendations of both Committees the District’s Board of Directors approved a \$600 Million bond program that would add a new elementary school and a new middle school, replace two existing elementary schools, create an Innovative Learning Center, and upgrade or replace systems at multiple sites. These projects are described in Table 12. In February 2020 this bond measure received 56% voter approval, short of the needed 60%. The Board of Directors is evaluating next steps.

**Table 12 — Construction Projects**

<b>Proposed Projects</b>	<b>Estimated Completion Date</b>	<b>Student Capacity Change</b>	<b>Estimated Project Cost</b>
Complete Spruce Phase 2 <sup>2</sup>	2021	184	\$42,200,000
New Middle School	2024	900	\$128,800,000
New College Place Middle	2024	75	\$128,800,000
New Elementary School	2022	550	\$67,000,000
New Oak Heights Elementary <sup>1-3</sup>	2023	TBD	\$64,200,000
New Beverly Elementary <sup>1-3</sup>	2023	TBD	\$63,000,000
New Innovative Learning Center	2023	TBD	\$55,000,000
Renewal & Upgrade Projects (Multi-Site)	2020-2026	0	\$51,000,000

- 1. New replacement school will have a capacity of 550 students.
- 2. Relocatable classrooms excluded in calculation of existing capacity.
- 3. Boundary Adjustment will affect capacity change. Precise numbers to be determined.



**Table 13 – Capital Construction Finance Detail**

	<b>Budget</b>	<b>Local Funds '20 Bond</b>	<b>State Construction Assistance*</b>	<b>Other Property Revenue</b>
Complete Spruce Phase 2	\$42,200,000	\$42,200,000	TBD	TBD
New Middle School	\$ 130,500,000	\$130,500,000	Not eligible	
New College Place Middle	\$130,500,000	\$130,500,000	TBD	TBD
New Elementary School	\$66,000,000	\$66,000,000	Not eligible	TBD
New Oak Heights Elementary	\$61,600,000	\$61,600,000	TBD	TBD
New Beverly Elementary	\$65,000,000	\$65,000,000	TBD	TBD
New Innovative Learning Center	\$ 47,000,000	\$ 47,000,000	Not eligible	TBD
Renewal & Upgrade Projects (Multi-Site)	\$ 57,200,000	\$ 57,200,000	Not eligible	TBD

\*Under the Current School Construction Assistance Program the Edmonds School District is not eligible for assistance to increase enrollment capacity at the K-8 grade level. The District's only eligibility is for modernization or new-in-lieu replacement of existing square footage.

If eventually approved by voters, 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 2023 and to update existing classroom and building space to assist in achieving its total local educational program objectives. The District would adjust attendance boundaries to accommodate the new schools and balance enrollment among schools.

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

Fifty relocatable classrooms are currently in use at school sites throughout the District, providing additional capacity for increased enrollment and for full day kindergarten and reduced class size at the primary grade level. Future enrollment fluctuations may require these units to be moved to schools needing program capacity changes on a yearly basis.

**Site Acquisition and Improvements**

The District currently owns enough school sites to accommodate projected student housing needs through the year 2036.

## 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 Construction Assistance Program (SCAP)**

State Construction Assistance Program funds (SCAP) come from the Common School Construction Fund. School districts may qualify for SCAP 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 Construction Assistance Program funds can only be generated by school construction projects. Site acquisition and improvements are not eligible to receive SCAP 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.

### **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 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 may decide to collect impact fees in the future. This decision will be based on information available at the time. Given the dynamic development of additional residential capacity within the District's borders, the District cannot rule out the need for future fees. 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.

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.

**Appendix A**  
**FLO Analytics Reports**


**Enrollment and Student Generation Rates**




## MEMORANDUM

To: Stewart Mhyre  
Edmonds School District

Date: January 4, 2019

From: Tyler Vick  
Principal 

Project: F1152.04.01

Jerry Oelerich  
Data Analyst 

RE: Enrollment Forecasts Report – Edmonds School District

At your request, FLO Analytics (FLO) conducted demographic and geographic analysis to assist the Edmonds School District (District) in understanding enrollment trends and to produce forecasts of future student enrollment. The analysis was completed through three main tasks: 1) Student Enrollment Assessment 2) Land Use Analysis 3) Projected Student Enrollment Distribution Analysis. These forecasts provide the number of students by grade group that will be residing in each of the District's elementary, middle, and high school attendance areas at the beginning of the 2023–24 and 2028–29 school years. Residence-based forecasts are also provided for the intervening years between the baseline year (2018–19) and 5-year forecast.

### SUMMARY FINDINGS

#### Student Enrollment Assessment:

- FLO's analysis occurred within the boundaries of Edmonds School District (Figure 1). Individual students were mapped and geocoded to the parcel-level. Figure 2 shows the distribution of students across the District.

#### Land Use Analysis:

- Of students enrolled in District schools in 2018–19, 69.0% reside in single-family (SF) housing, 28.8% in multi-family (MF) housing, and 2.2% in housing that FLO is unable to immediately classify as SF or MF. Development data compiled by FLO indicates that the MF percentage is likely to increase over the forecast range.
- FLO conducted phone interviews with planners from Snohomish County and the municipalities of Brier, Edmonds, Lynnwood, and Mountlake Terrace to discuss foreseeable

residential growth within the District throughout the forecast range. Key development data acquired through these meetings are presented in Figure 3, which shows the locations of expected SF and MF developments. More detailed information from these meetings, as well as assumptions made by FLO staff, are available within the Land Use Addendum, GeoPlanner web application, as well as upon request.

The most notable areas of development include:

- West side of Lynnwood, particularly within the city center between I-5, 196th and 48<sup>th</sup> and near the Alderwood Mall. This high-growth area is partly fueled by the expected mid-2024 completion of Sound Transit's Lynnwood light-rail extension. There are three distinct multi-family developments (Alderwood Avalon on the Old Sears Site, Alderwood South Project, and Home Depot Site) that will account for approximately 1,068 units based on current plans, all of which are expected to be built by 2023. While there have not been any other specific, significant development applications submitted yet, our forecasts assume similar numbers of MF units will also materialize between 2023 and 2028 in the Lynnwood City Center area of expected high growth. While the majority are expected to be studio and single bedroom units, some will be two plus bedrooms and available for families. There are also 5-10 single-family projects on the periphery of the Alderwood Mall area, totaling just over 50 units.
- The southwest portion of Lynnwood, west of Hwy 99, contains four developments—primarily townhomes—totaling 692 units. The assuredness of these developments coming to fruition is in question; therefore, assumptions were made limiting the impact on enrollment.
- The Mountlake Terrace Town Center, east of I-5 near the transit center, possesses a significant concentration of predominantly MF units. Based on current data, 555 MF units are planned, the majority from two developments—Gateway TOD Phase 1 (258 units) and Atlas 236 (151 units). On the outskirts of the Town Center, 20 SF units are in the development pipeline.
- Southeast portion of Edmonds along the Hwy 99 corridor, including lots within the unincorporated Esperance area. Development will predominantly be MF, totaling approximately 242 units. Like Edmonds as a whole, single-family building permits are also scattered throughout the area. A total of approximately 65 SF units are currently planned within the city limits and Esperance area.
- The northeast corner of the District, comprised on unincorporated Snohomish County, contains a considerable amount of planned SF developments. In total, just under 400 units are expected to be developed; the majority east of I-5 and north of Hwy 405. Two medium-sized MF developments are also planned along the I-5

corridor—Greater Residence Apartments (123 units) and Allegro at Ash Creek, Phase II (108 units).

- Brier and Woodway are expected to see a comparatively low-level of scattered SF developments.
- The Urban Village plan in unincorporated Snohomish Co. near Woodway is nowhere near construction phase. The developer is doing the bare minimum to keep the project alive. The County is currently reviewing EIS. Any potential plan is well beyond the 2028 forecast horizon.

**5-year Enrollment Forecasts Summary:**

- Between the 2018–19 and 2023–24 school years, overall District enrollment (headcount) is projected to increase from 20,307 to 21,180 or by 4.3%.
- The District is projected to capture 79.9% of the forecasted District population of all school-age children (25,698 children). The grade and attendance-level capture rates used were informed by known 2018-19 student data. Note that out-of-District students account for 3.0% of forecasted enrollment.
- Although unique for each development, overall average per unit student generation rates within the District used, by residential housing category, are 0.45 for single-family households and 0.16 for multi-family households (drawn down by a large number of expected studio and single bedroom apartments in the Lynnwood City Center area).
- Included in these forecasts is an increase in grades:
  - K–6 enrollment from 11,009 to 11,442 (3.9% gain); 2.4% from out-of-District
  - 7–8 enrollment from 3,034 to 3,204 (5.6 % gain); 2.8% from out-of-District
  - 9–12 enrollment from 6,264 to 6,533 (4.3 % gain); 4.1% from out-of-District
- Both these and the 10-year forecasts exclude PS, as well as EdCAP/Open Doors and full-time Running Start high school students.

**10-year Enrollment Forecasts Summary:**

- Between the 2023–24 and 2028–29 school years, overall District enrollment (headcount) is projected to increase from 21,180 to 21,909 or by 3.4%.
- The District is projected to capture 79.9% of the forecasted District population of school-age children (26,586 children).
- Included in these forecasts is an increase in grades (with the same proportions of out-of-District students as for the 2023–24 forecasts):
  - K–6 enrollment from 11,442 to 11,913 (4.1% gain)

- 7–8 enrollment from 3,204 to 3,335 (4.1% gain)
- 9–12 enrollment from 6,533 to 6,661 (2.0% gain)
- Over the 10-year range, these 2028–29 forecasts represent an increase over 2018–19 counts by 7.9% for overall District enrollment, 8.2% for grades K–6, 9.9% for grades 7–8, and 6.3% for grades 9–12.

#### **Annual District-Wide Building Attendance Enrollment Forecasts by Grade Group:**

- Figure 4 shows the total annual District enrollment forecasts through the 2028–29 horizon for low, medium (preferred), and high-growth scenarios. Figure 5 shows the enrollment forecasts broken down by grade group for the medium growth series.
- Figures 6–8 provide elementary, middle, and high school building attendance enrollment projections through 2028–29, respectively, for low, medium, and high-growth scenarios.

#### **Detailed Attendance Area Residence Forecasts:**

- Figures 9–11 detail projected change over the next five years in the number of District students residing in each attendance area for elementary, middle, and high, respectively. Note that our forecasts are produced at a significantly more granular level—that of Census block group, of which there are 121 in the District. For future boundary scenario modeling (or other work, these more granular forecasts are available upon request, and can be accurately aggregated to current or future attendance area boundaries.
- Figures 12–14 provide annual forecasts by attendance area of District students residing in each attendance area for elementary, middle, and high, respectively. Figure 15 provides district grade totals (and includes both residence-based and building attendance totals by grade group).

#### **Helpful Notes on Using Forecasts:**

- The two fundamental types of student enrollment forecasts are building/program attendance (i.e., the number of students expected to attend school at a specific building), and residence-based (i.e., the number of students expected to reside within a certain region, whether it be the District as a whole, or individual attendance areas).
- Residence-based forecasts are generally more accurate than building attendance forecasts, as they are not subject to variability linked to student choices (e.g., intra-district transfers), movement of program locations, constraints on intra-district transfers imposed by building capacities, etc. The current rates of intra-district transfer for the elementary, middle, and high school grade groups, respectively, can be found in the Figures 16–18 residence-attendance enrollment pattern matrices.
- Residence-based forecasts are rooted in student location, and therefore, with the proper granularity, can be re-allocated to different boundaries besides the current attendance areas.



This, coupled with their increased accuracy over building attendance forecasts, makes them more suitable for boundary scenario modeling.

- In district-wide totals, building attendance forecasts will always be greater than residence-based ones, as by definition, only the building attendance forecasts include out-of-district students.
- Finally, when comparing building attendance and residence-based forecasts for an individual school, it is important to recognize that the two can sometimes vary quite considerably. In some cases, the building attendance is higher than the count of students residing in the corresponding attendance area (e.g., Chase Lake), while at other times it is lower (e.g., Lynnwood).

## COMPARISON TO PRIOR YEAR FORECASTS

### DISTRICT-LEVEL

Last year's (2017–18 base year) District-level elementary enrollment forecast for 2023–24 was 11,736, whereas this year's forecast for 2023–24 is 11,442 (2.5% difference). For middle school, last year's forecast was 3,257, with this year's being 3,204 (1.6% difference). Finally, for high school, last year's forecast was 6,664, with this year's being 6,533 (2.0% difference). Note that last year's district-wide forecast for 2018–19 was 0.8% high (see Figure 19).

Last year's forecast for the elementary grade group was 1.3% high (Figure 20 provides error by grade group for 2018–19 forecasts by grade group), and this was partly due to our optimistic K forecast. Overall, our assumptions of net in-migration of elementary school age children were slightly high. As such, we've lowered the future annual K class sizes built into our forecasts, and marginally lowered our elementary grade progression ratios to assume lower in-migration rate. That said, although the elementary grade group has stagnated the last couple of years, we still see ample evidence of housing development in the pipeline to continue to support sustained growth, and do not expect a prolonged retraction.

Although last year's forecasts were 1.4% low for middle school, and as we gain more years of data on the District (e.g., geocoded student residences and multiple data points on capture rate), we feel last year's 2023–24 middle school forecasts were slightly high. As such, we have lowered the middle school forecasts for that year by 53 students. The smaller size of the middle school grade group relative to elementary and high lends to difficulty in achieving tight accuracies.

Finally, while last year's forecast for the high school grade group was only 0.9% high, the lower grade progression ratios we employed in this year's model have a compounding effect as each grade-to-grade turnover happens as students roll up to high school. The net result is that we've reduced our 2023–24 high school forecast by 2.0%.

### ATTENDANCE AREA-LEVEL

Of note is that for the Lynnwood and Oak Heights attendance areas, we have dialed back our growth assumptions. This is due to reduced expectation of in-migration due to increased clarity on the fact that much of the MF development occurring in Lynnwood is studio and single bedroom apartments, as well as lower assumed student yield factors in general, as affordability continues to be an increasing barrier to young families moving into the District. That said, conditions can change quickly, and these attendance areas should continue to be closely monitored.

Additionally, as noted earlier in the report, there is increased uncertainty regarding some of the MF developments that have been perpetually on the horizon in the Lynndale attendance area. This is reflected by a significant reduction in our forecast for Lynndale over the next several years.

## **ENROLLMENT FORECASTS METHODOLOGY**

### **EXTERNAL DATA SOURCES**

In addition to historic enrollment and housing development data provided by the District, FLO used the following external data sources to inform our student enrollment forecasts:

#### Student Enrollment Assessment and Land Use Analysis:

- Student addresses and attribute data from the District's October 3, 2018 student information system (SIS)
- School attendance area boundaries provided by the District
- Snohomish County Parcels
- 2018 Statewide Urban Growth Areas and City Limits from WA Department of Ecology
- FLO-conducted phone interviews with planners from Snohomish County and the municipalities of Brier, Edmonds, Lynnwood, and Mountlake Terrace.
- County/City zoning, comprehensive plan, building permits, plats, etc. data

#### Enrollment Forecasting:

- US Census and American Community Survey
- Esri 2018/2023 US Demographics
- Historic October Enrollment provided by the District
- Washington State Office of Superintendent of Public Instruction (OSPI) October Enrollment
- Washington State Office of Financial Management (OFM) forecasts
- Washington State Department of Health (WDOH) birth data

- Puget Sound Regional Council (PSRC) Land Use Baseline (LUB) and Vision (LUV) forecasts

### **INITIAL STEPS**

Our first step in preparing enrollment forecasts is to perform a detailed assessment of the geographic distribution of District students, as well as historic enrollment trends (i.e. last five years). The results of this preliminary analysis feed into our enrollment forecasts, which use a combination of the demographic cohort-component model to forecast population for the District by age and sex, and the enrollment rate method, which advances each age cohort through successive grade levels. In the former, the components of population change are births, deaths, and migration (which includes a detailed analysis of expected housing development and resulting student yields).

### **USE OF ENROLLMENT RATE METHOD**

In terms of linking historic enrollment trends to future enrollment forecasts, the enrollment rate method is first used to look at the percent of five-year-olds living in the District boundary in the 2018–19 school year that enrolled in K at District schools. This is referred to as the K enrollment (or “capture”) rate. Separate enrollment rates are computed in a similar manner for each of the other age/grade cohorts present in 2018–19 (i.e., 1st through 12th grades). These cohort-specific enrollment rates, modified based on certain assumptions (e.g, drop-out rates in high school), are the primary basis for determining the rate at which each given cohort will be enrolled in the future, and can be thought of as a means of calibrating the future enrollment forecasts. For example, the 2018–19 3rd grade enrollment rate of 8-year-olds heavily informs the 8th grade capture rate of the projected 13-year-old District population in 2023–24, and so forth.

### **PROJECTING NET MIGRATION**

Another way historic enrollment data are used is by leveraging knowledge of the geographic distribution of the 2018–19 student population to calculate enrollment rates at the sub-District level. To do this, FLO divided the District into 36 regions (corresponding to Census tracts), each with a sufficient number of students at each grade level to permit statistical calculations. These sub-District, cohort-specific enrollment rates were applied as a baseline to new District school-age children projected to be added due to net in-migration over the next five years. Note that the future migration rate and population projections used, which were largely informed by Esri’s 2018/2023 US Demographics, were prepared at an even finer geographic resolution (Census block groups), and at units that are generally socioeconomically distinct from each other.

The Esri 2018/2023 US Demographics dataset is prepared using recent growth trends derived from US Census and state/local sources such as OFM, and account for regional land use and comprehensive plans, publicly available development data (i.e. permits), housing inventory, and US Postal Service carrier route additions to track growth. Prior to use, FLO reviews these data and

confirm proper assumptions and incorporation of local data sources, particularly with respect to any publicly available vacant lands and comprehensive plan data, making modifications as warranted based on our detailed review of local data. In particular, FLO performs a very detailed analysis to incorporate expected housing development and associated student yields.

The benefit of this approach is that the geographic analysis performed allowed for a granular forecasting of how many of the eligible new children in the District over the next five years will enroll in District schools, which is expected to be more accurate than simply using District-level rates to predict capture. This is key, as migration often plays a larger role in future enrollment levels than any other factor—more so than gradual changes in birth rate, for example—but can vary greatly within a region.

Regarding expected student yields from new housing development, student yield factors used for each development were approximated at the neighborhood level by looking at existing student ratios (per SF and MF unit) in all housing units for each of those neighborhoods, and adjusting those ratios using development-specific information provided by planners, as well as educated assumptions about trends specific to new development. FLO's analysis merges student counts forecasted within existing housing inventory with the student generation expected from new development.

At the end of each 5-year window, the attendance area numbers are modified as needed to ensure they are consistent with District-wide numbers, which are computed using only District-wide population and historic enrollment numbers. In this way, the District-wide numbers are used to “control” the attendance area-level numbers.

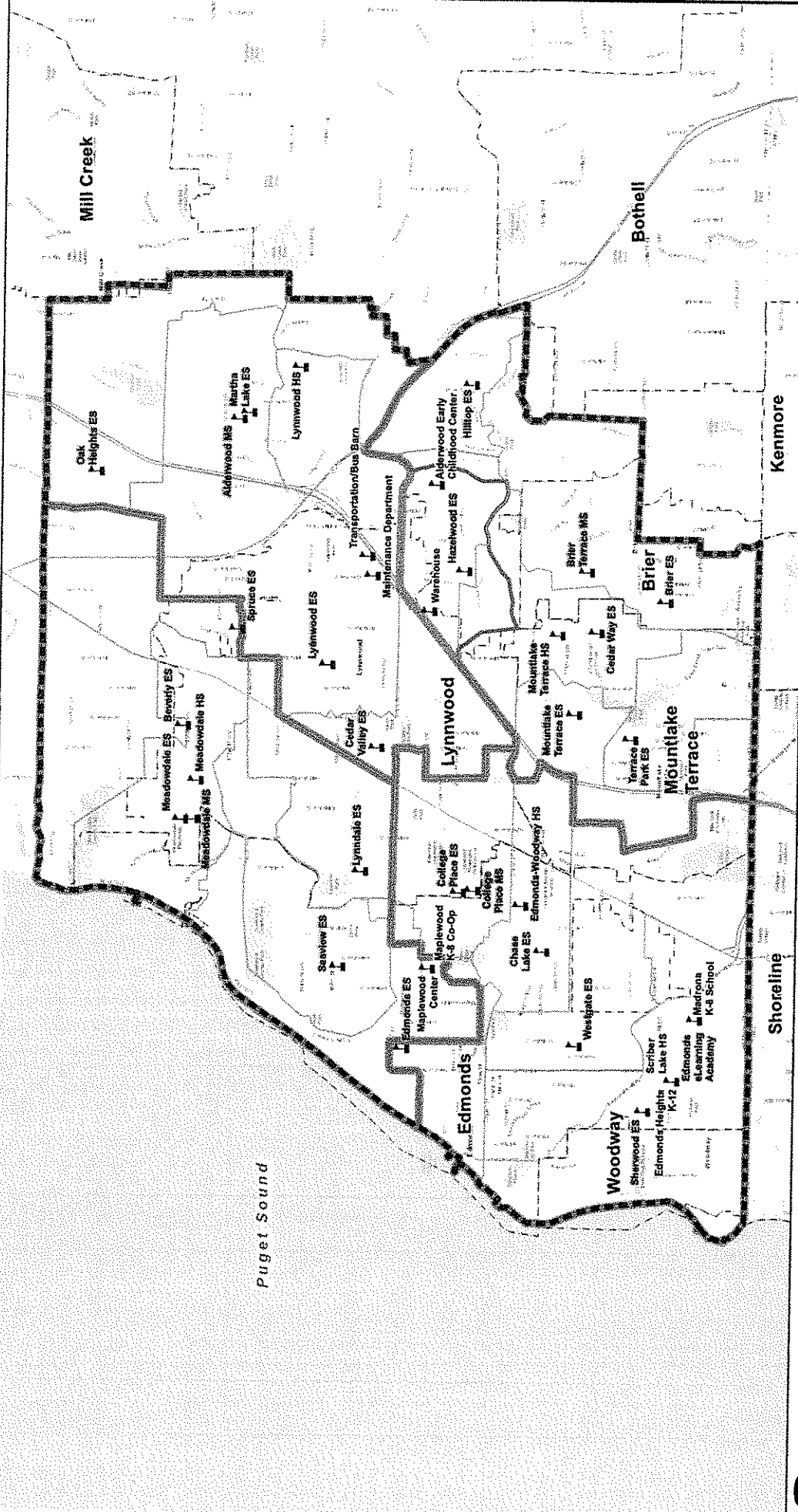
#### **LONGER-TERM FORECASTS (10-YEAR)**

Our 10-year forecasts assume similar Census tract-level migration patterns between 2023–24 and 2028–29 as were applied between 2018–19 and 2023–24, only scaled back proportionately as the slowing in District total population growth, as well as quantities of buildable land within district boundaries and the relative rates at which those spaces are expected to be built out (e.g., as ascertained from review of all known development data).

2018–23 births, which inform K classes beginning with the 2023–24 school, were projected based on a review of available historic WDOH city and county birth data throughout the District (Snohomish County, and the municipalities of Edmonds, Lynnwood, and Mountlake Terrace), forecasted population of females of child-bearing age throughout the District, and county and state trends in fertility (declining).

In terms of capture rate, the grade-specific rates computed from the 2018–19 student enrollment assessment are used. Also, as with the shorter-term projections, a 3-year average of grade progression ratios are enforced at the District level.

# District Overview



**Legend:**

- School Location
- District Boundary
- Incorporated Municipality
- Urban Growth Area (UGA)
- Elementary School Attendance Area
- Middle School Attendance Area
- High School Attendance Area

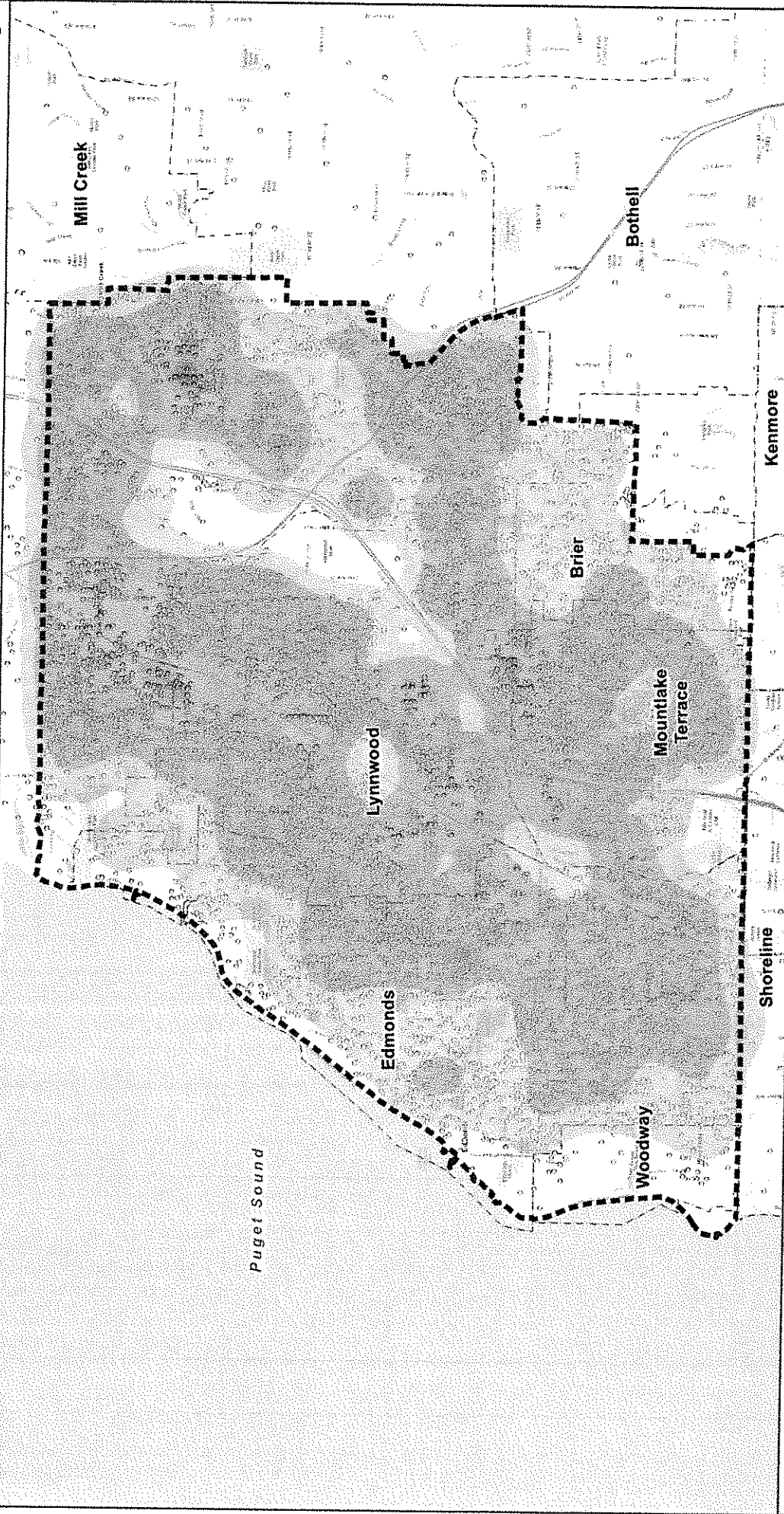
## Figure 1

**FLO**  
Profyca

0 0.25 0.5 1 Miles

N

# Student Density



**FLO Analytics**

0 0.25 0.5 1 Miles

N

Student Household Location (10/01/2018 SIS)

Incorporated Municipality

Student Density per Square Mile

1/2-mile Radius Analysis

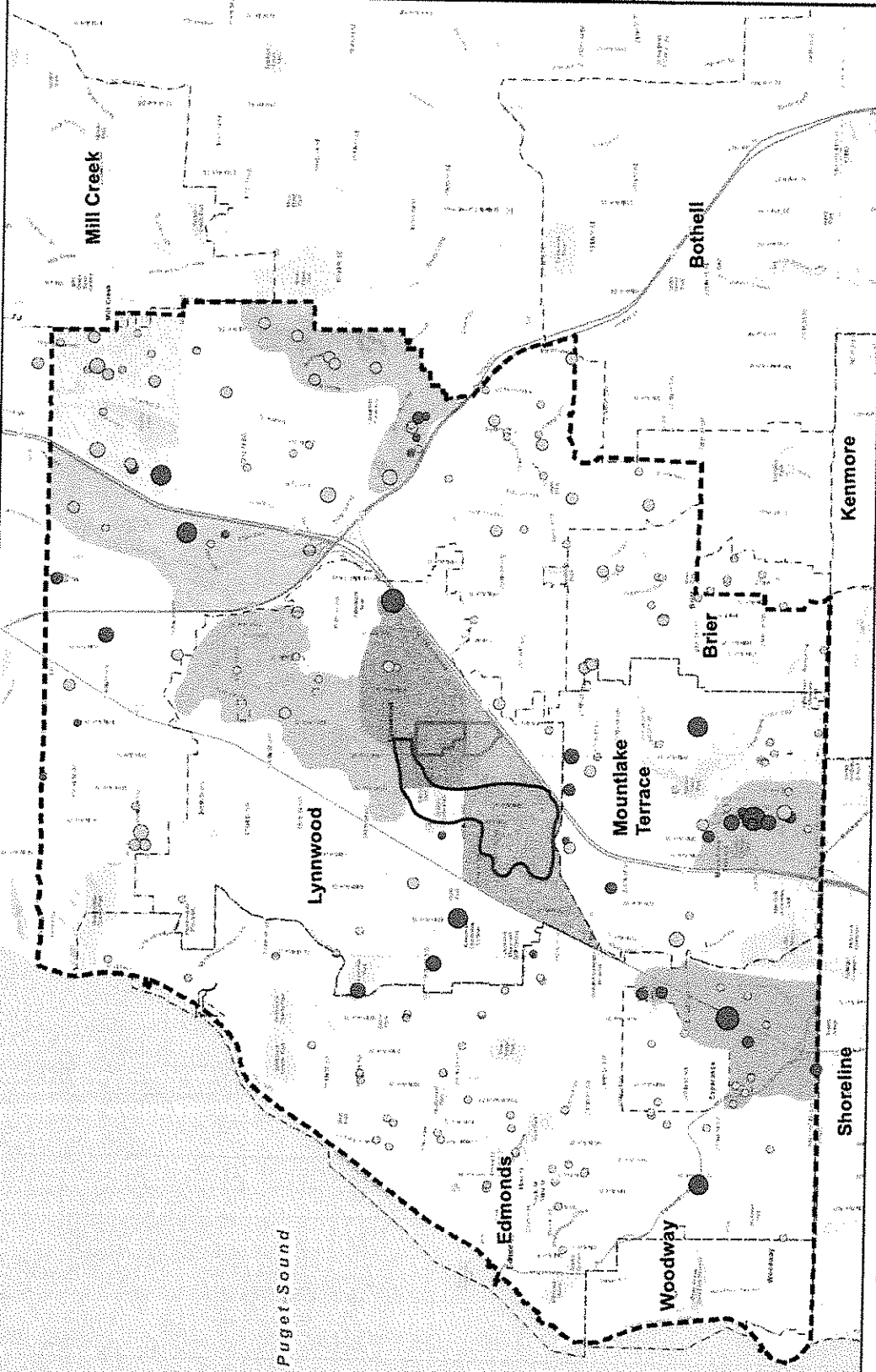
0.0 - 200.0	200.1 - 450.0	450.1 - 700.0	700.1 - 950.0	950.1 - 1,200.0
1,200.1 - 1,450.0	1,450.1 - 1,700.0	> 1,700.1		

## Figure 2

# Land Use & Development Overview

**Areas of Interest**

- Area of expected high growth (Ash Way)
- Area of expected high growth (Hwy 99 corridor); Maximum of 4,900 units in 20 years
- Area of expected high growth (Lynnwood City Center)
- Area of expected high growth (Martha Lake)
- Area of expected high growth (Mountlake Terrace Town Center)
- Area of expected high growth (Hwy 405)
- Area with 1-2 lot Single-family developments
- South Lynnwood Subarea; changes within the next 2-5 years (SF, MF, Commercial)
- Area to be maintained as Single-family
- Potential Mixed Use area
- Transit Center



**FLO** Physics

0 0.25 0.5 1 Miles

N

District Boundary

Incorporated Municipality

Land Use & Development Data (2017/2018)

Multi-family

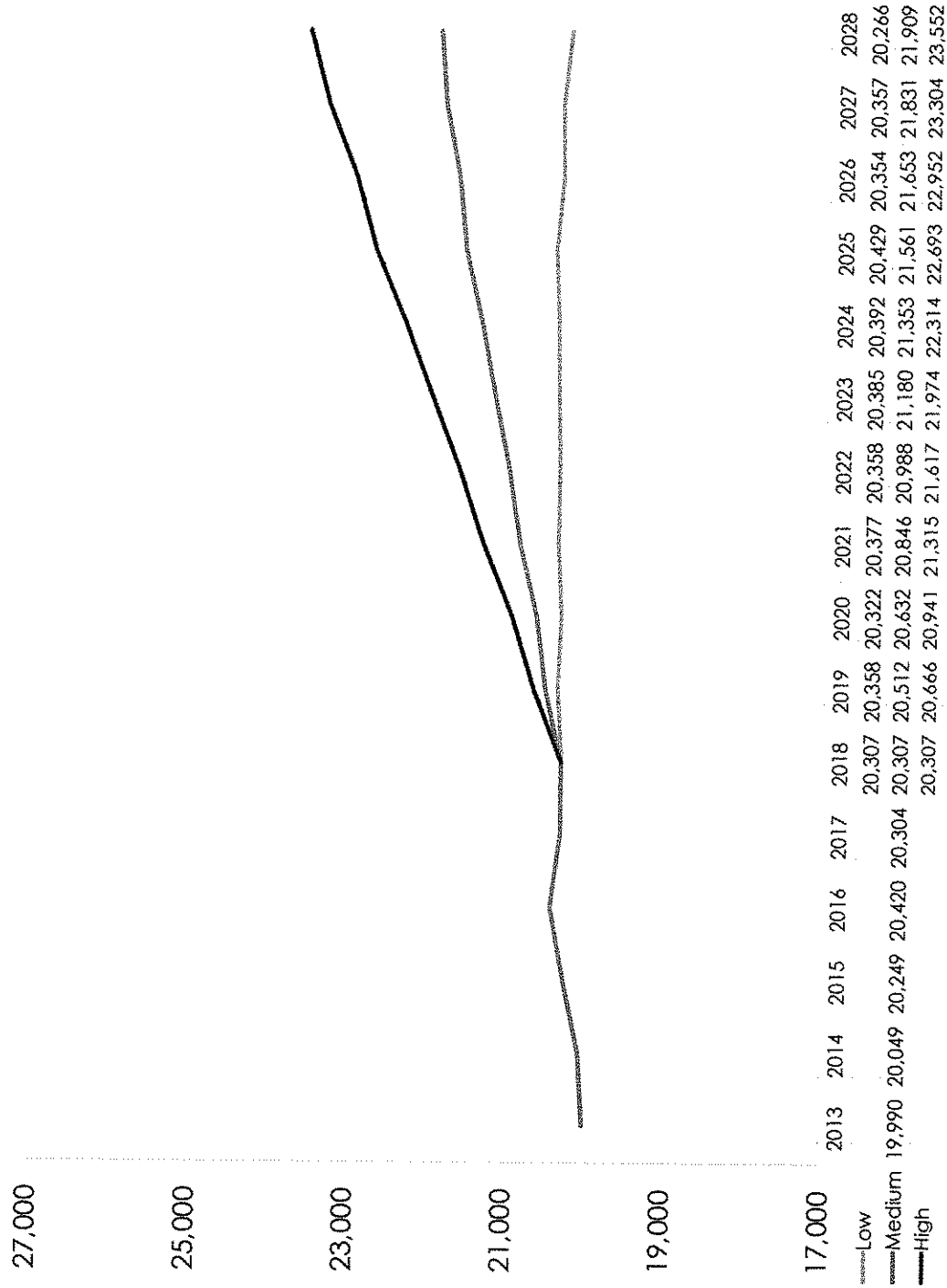
- 0 - 5
- 6 - 25
- 26 - 50
- 51 - 150
- > 150

Single-family

- 0 - 5
- 6 - 25
- 26 - 50
- 51 - 150
- > 150

## Figure 3

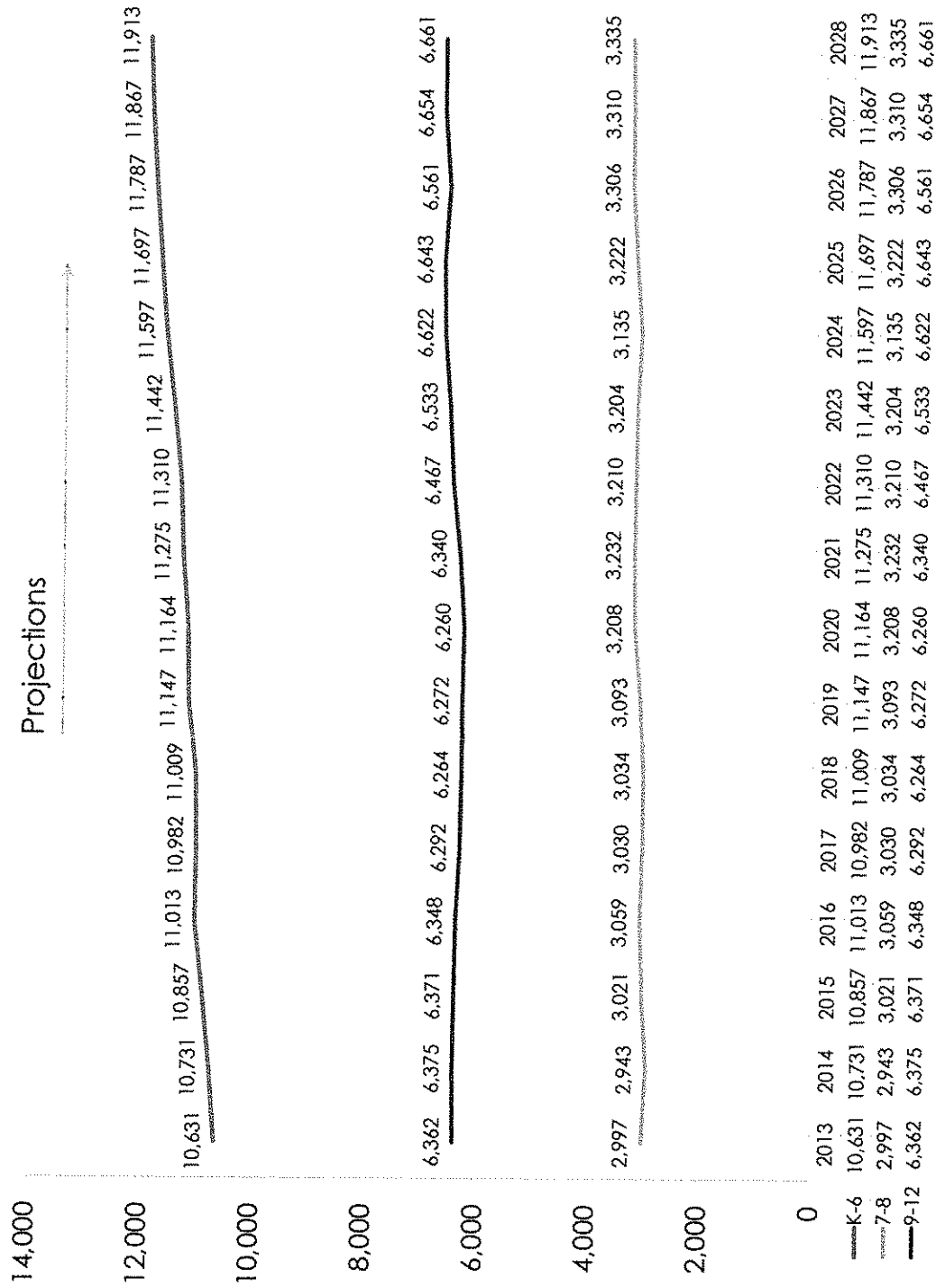
**Figure 4 – Total District Building Attendance Enrollment Forecasts (Headcount) – Low, Medium (Preferred), and High-Growth Series**



Total District October 1<sup>st</sup> building attendance enrollment forecasts (headcount) through 2028—low, medium, and high-growth series. Includes all schools, and students living both within and outside the District. Excludes PS, and high school ED CAP/Open Doors and full-time Running Start students.

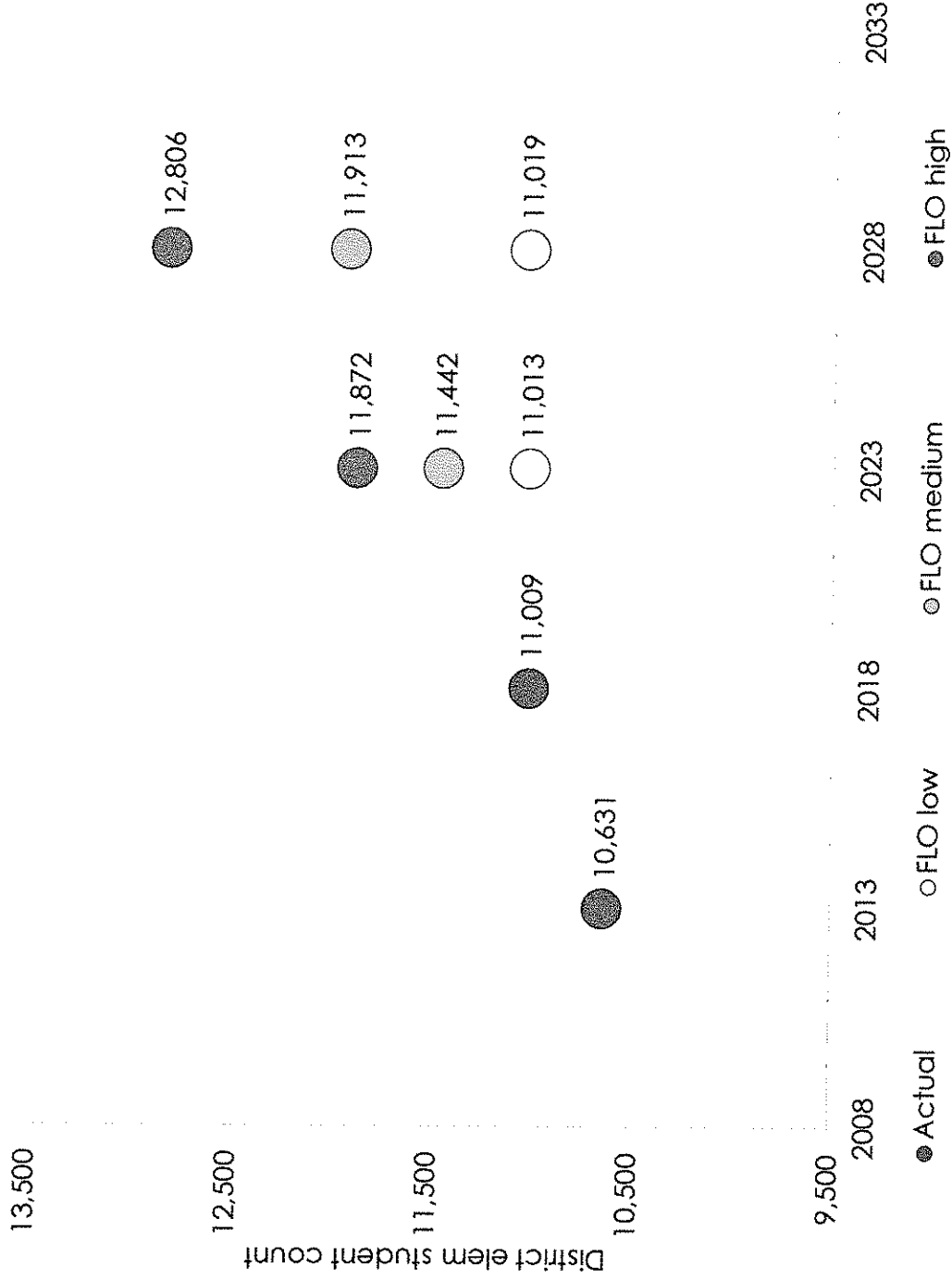


**Figure 5 – Building Attendance Enrollment Forecasts (Headcount) by Grade Group – Medium Growth Series (Preferred)**



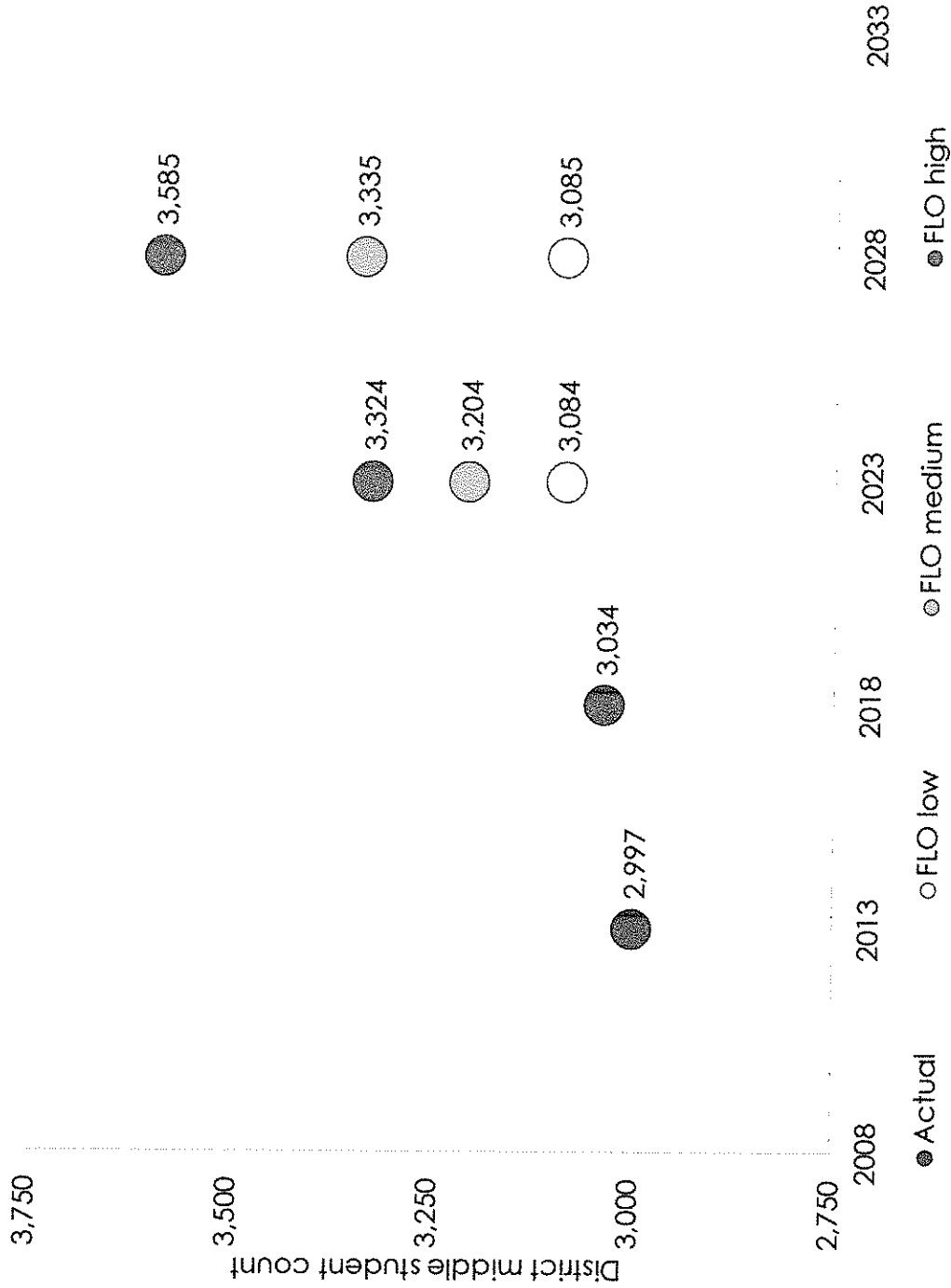
October 1<sup>st</sup> building attendance enrollment forecasts (headcount) through 2028 by grade group, medium-growth series. Includes all schools, and students living both within and outside the District. Excludes PS, and high school EDCAP/Open Doors and full-time Running Start students.

**Figure 6 – Elementary School Building Attendance Enrollment Forecasts (Headcount) – Low, Medium (Preferred), and High-Growth Series**



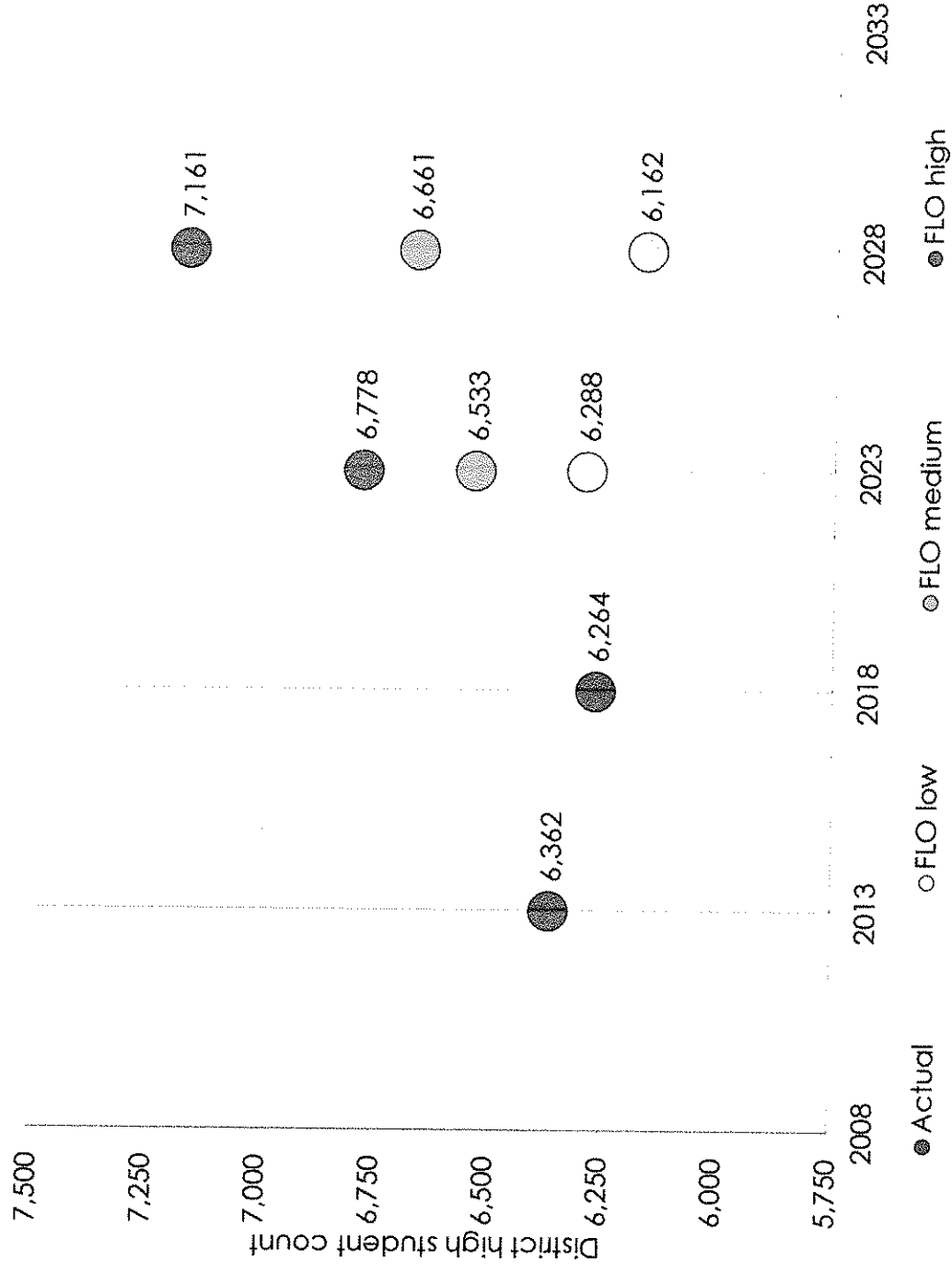
Elementary school October 1<sup>st</sup> building attendance enrollment forecasts (headcount) for 2023 and 2028—low, medium, and high-growth series. Includes all schools, and students living both within and outside the District. Excludes PS.

**Figure 7 – Middle School Building Attendance Enrollment Forecasts (Headcount) – Low, Medium (Preferred), and High-Growth Series**



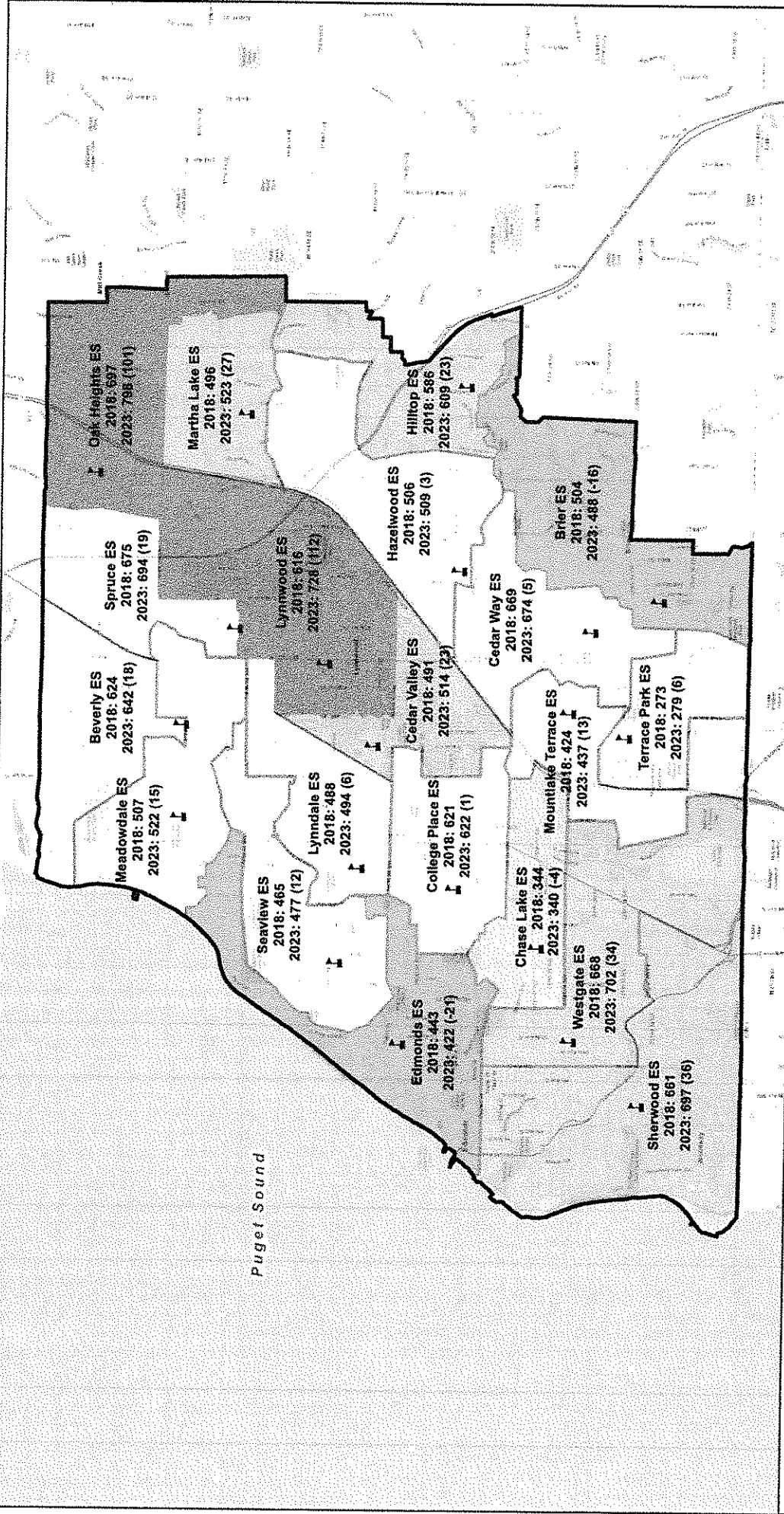
Middle school October 1<sup>st</sup> building attendance enrollment forecasts for 2023 and 2028—low, medium, and high-growth series. Includes all schools, and students living both within and outside the District.

**Figure 8 – High School Building Attendance Enrollment Forecasts (Headcount) – Low, Medium (Preferred), and High-Growth Series**



High school October 1<sup>st</sup> building attendance enrollment forecasts (headcount) for 2023 and 2028—low, medium, and high-growth series. Includes all schools, and students living both within and outside the District. Excludes EDCAP/Open Doors and full-time Running Start students.

# 5-year Enrollment Forecasts - Elementary School

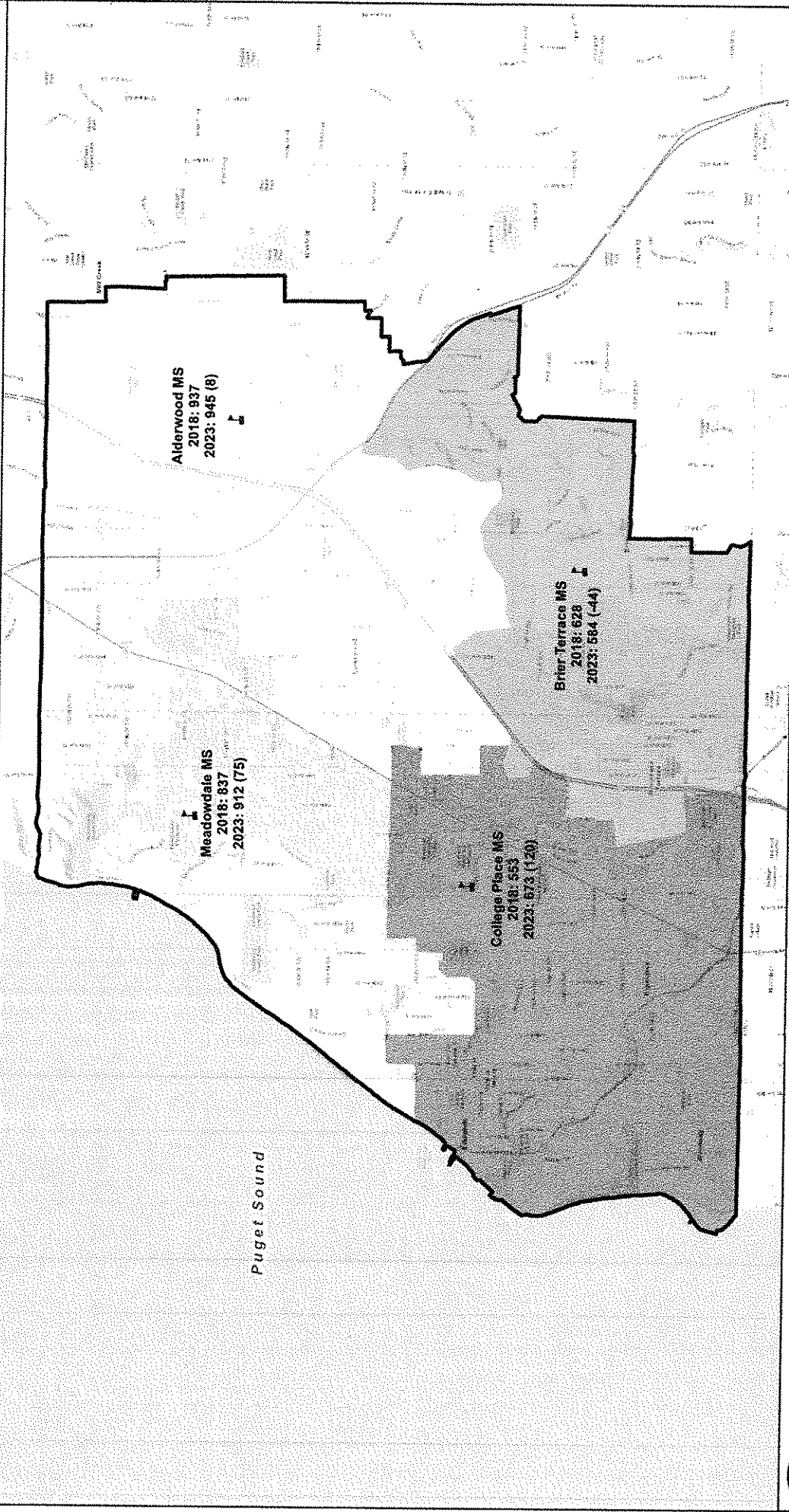


School Location  
 Elementary School Attendance Areas  
 District Boundary  
 2018-2023 Magnitude of Change  
 -15 to 0  
 1 to 20  
 31 to 50  
 > 50  
 < -15

FLO Analytics  
 0 0.25 0.5 1 Miles  
 N

Figure 9

# 5-year Enrollment Forecasts - Middle School



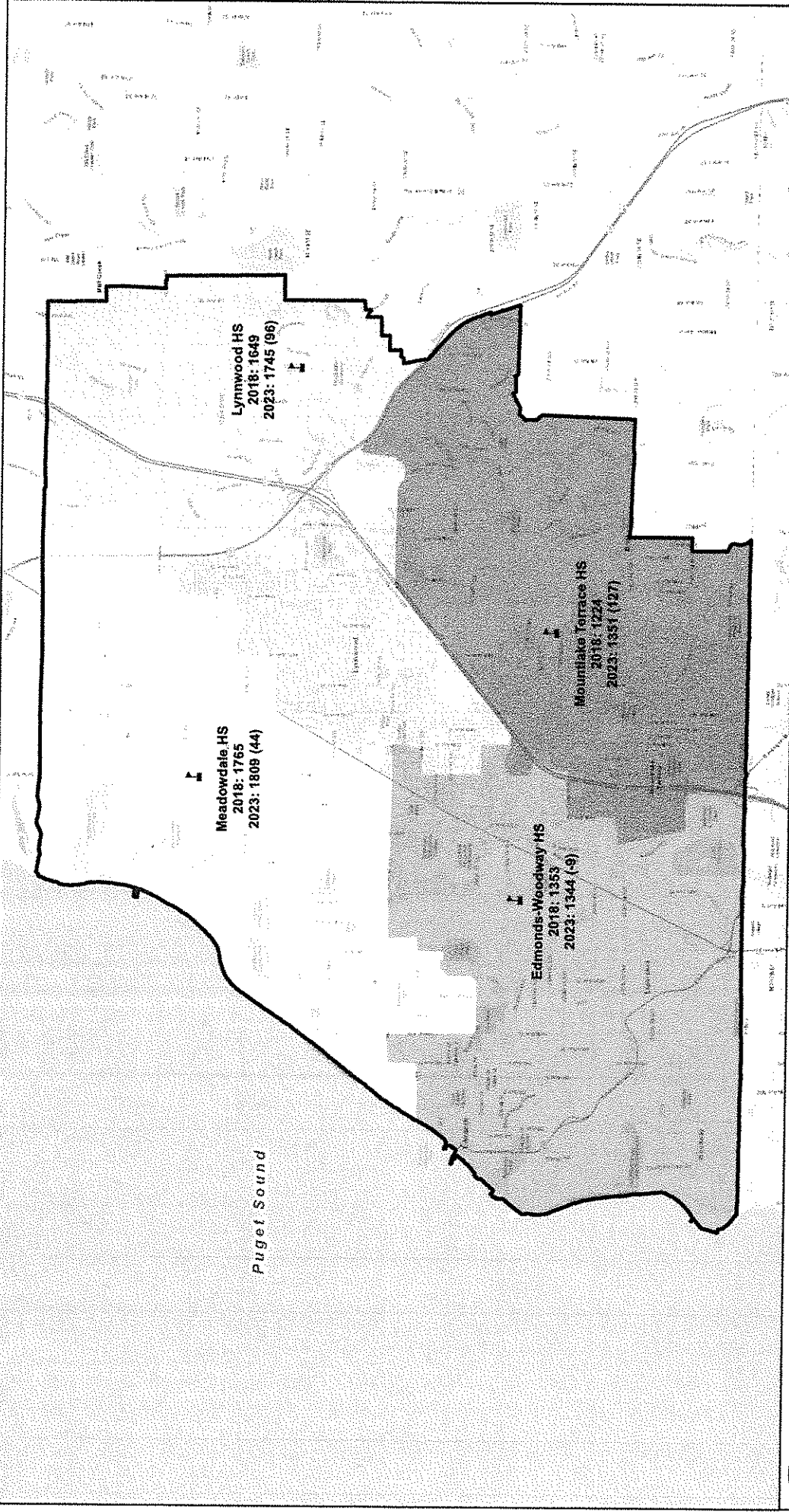
**FLO**  
Analytics

0 0.25 0.5 1 Miles

School Location  
 District Boundary  
 Middle School Attendance Areas  
 0 to 25  
 26 to 75  
 > 75  
 < 0  
 > 75

**Figure 10**

# 5-year Enrollment Forecasts - High School



**Figure 11**

**Figure 12 – Elementary School Attendance Area Residence-Based Forecasts (Headcount)**

**Attendance Areas**

Attendance Area	Building Attend.	Students Residing* →						
	2018	2018	2019	2020	2021	2022	2023	2028
Beverly ES	567	624	635	650	647	644	642	683
Brier ES	441	504	513	493	481	486	488	497
Cedar Valley ES	442	491	503	502	505	515	514	549
Cedar Way ES	560	669	675	666	668	658	674	657
Chase Lake ES	409	344	350	350	348	344	340	355
College Place ES	514	621	609	608	612	601	622	627
Edmonds ES	350	443	434	430	431	428	422	440
Hazelwood ES	464	506	509	508	503	509	509	524
Hilltop ES	545	586	585	595	595	605	609	634
Lynndale ES	428	488	481	472	475	477	494	506
Lynnwood ES	525	616	642	662	700	709	728	799
Martha Lake ES	455	496	505	513	516	509	523	553
Meadowdale ES	514	507	509	512	520	518	522	545
Mountlake Terrace ES	402	424	429	416	428	426	437	462
Oak Heights ES	617	697	731	751	769	784	798	859
Seaview ES	438	465	466	472	475	480	477	470
Sherwood ES	534	661	663	670	669	678	697	716
Spruce ES	576	675	689	670	684	695	694	731
Terrace Park ES	296	273	278	272	277	276	279	302
Westgate ES	538	668	675	685	704	698	702	719
<b>K-6</b>	<b>9,615</b>	<b>10,758</b>	<b>10,881</b>	<b>10,897</b>	<b>11,006</b>	<b>11,040</b>	<b>11,169</b>	<b>11,629</b>

\*An additional 263 elementary school students residing out-of-district were also enrolled on October 1st, 2018

**Non-Attendance Area Buildings/Programs**

Building/Program	Building Attend.
Challenge (@TP)	316
Edmonds Heights K-12	249
E-Learning	0
Madrona K-8	462
Maplewood K-8	361
Other	6
<b>K-6</b>	<b>1,394</b>

Annual elementary school attendance area residence-based forecasts through 2028. Shown are 2018 actual counts of District students residing in each attendance area (October 3<sup>rd</sup>, 2018 SIS), as well as October 1<sup>st</sup> projections for each subsequent year. Excludes PS. Also included are October 1<sup>st</sup>, 2018 building attendance numbers (OSPI) for each school (including schools and programs without attendance areas), which are independent of the attendance area residence numbers. By definition, the attendance area residence numbers do not include students living outside the District, whereas the 2018 building attendance numbers do. Note that the OSPI (9,615+1,394=11,009) and SIS (10,758+263=11,021) totals differ slightly due to the timing of the respective data reporting/exporting efforts.



**Figure 13 – Middle School Attendance Area Residence-Based Forecasts (Headcount)**

**Attendance Areas**

Attendance Area	Building Attend.	Students Residing* →						
		2018	2019	2020	2021	2022	2023	2028
Alderwood MS	816	937	898	887	916	927	945	1,029
Brier Terrace MS	683	628	600	636	660	615	584	598
College Place MS	433	553	633	687	660	684	673	697
Meadowdale MS	734	837	876	909	905	895	912	917
<b>7-8</b>	<b>2,666</b>	<b>2,955</b>	<b>3,007</b>	<b>3,118</b>	<b>3,141</b>	<b>3,121</b>	<b>3,114</b>	<b>3,241</b>

\*An additional 85 middle school students residing out-of-district were also enrolled on October 1st

**Non-Attendance Area Buildings/Programs**

Building/Program	Building Attend.
Edmonds Heights K-12	100
E-Learning	8
Madrona K-8	14
Maplewood K-8	112
Other	7
<b>7-8</b>	<b>368</b>

Annual middle school attendance area residence-based forecasts through 2028. Shown are 2018 actual counts of District students residing in each attendance area (October 3<sup>rd</sup>, 2018 SIS), as well as October 1<sup>st</sup> projections for each subsequent year. Also included are October 1<sup>st</sup>, 2018 building attendance numbers (OSPI) for each school (including schools and programs without attendance areas), which are independent of the attendance area residence numbers. By definition, the attendance area residence numbers do not include students living outside the District, whereas the 2018 building attendance numbers do. Note that the OSPI (2,666+368=3,034) and SIS (2,955+85=3,040) totals differ slightly due to the timing of the respective data reporting/exporting efforts.

**Figure 14 – High School Attendance Area Residence-Based Forecasts (Headcount)**

**Attendance Areas**

Attendance Area	Building Attend.	Students Residing* →						
	2018	2018	2019	2020	2021	2022	2023	2028
Edmonds-Woodway HS	1,546	1,353	1,293	1,252	1,292	1,309	1,344	1,412
Lynnwood HS	1,377	1,649	1,721	1,744	1,763	1,750	1,745	1,876
Meadowdale HS	1,495	1,765	1,755	1,727	1,742	1,779	1,809	1,829
Mountlake Terrace HS	1,289	1,224	1,231	1,265	1,267	1,348	1,351	1,254
<b>9-12</b>	<b>5,707</b>	<b>5,992</b>	<b>5,999</b>	<b>5,988</b>	<b>6,064</b>	<b>6,186</b>	<b>6,249</b>	<b>6,372</b>

\*An additional 272 high school students residing out-of-district were also enrolled on October 1st

**Non-Attendance Area Buildings/Programs**

Building/Program	Building Attend.
Edmonds Heights K-12	183
E-Learning	95
Scriber Lake	266
Other	12
<b>9-12</b>	<b>556</b>

Annual high school attendance area residence-based forecasts through 2028. Shown are 2018 actual counts of District students residing in each attendance area (October 3<sup>rd</sup>, 2018 SIS), as well as October 1<sup>st</sup> projections for each subsequent year. Excludes EDCAP/Open Doors and full-time Running Start students. Also included are October 1<sup>st</sup>, 2018 building attendance numbers (OSP1) for each school (including schools and programs without attendance areas), which are independent of the attendance area residence numbers. By definition, the attendance area residence numbers do not include students living outside the District, whereas the 2018 building attendance numbers do. Note that the OSP1 (5,707+556=6,263) and SIS (5,992+272=6,264) totals differ slightly due to the timing of the respective data reporting/exporting efforts.

**Figure 15 – District Grade Totals, Attendance Area Residence-Based Forecasts (Headcount)**

Grade	2018	2019	2020	2021	2022	2023	2024	2025	2026	2027	2028
<b>K</b>	1,560	1,600	1,599	1,621	1,614	1,637	1,665	1,690	1,689	1,683	1,678
<b>1</b>	1,528	1,574	1,602	1,601	1,623	1,618	1,639	1,667	1,691	1,691	1,685
<b>2</b>	1,500	1,518	1,578	1,592	1,590	1,613	1,608	1,629	1,657	1,679	1,679
<b>3</b>	1,564	1,498	1,517	1,578	1,589	1,586	1,612	1,606	1,626	1,654	1,675
<b>4</b>	1,501	1,566	1,496	1,515	1,579	1,587	1,586	1,612	1,603	1,624	1,652
<b>5</b>	1,594	1,505	1,570	1,498	1,517	1,587	1,593	1,591	1,617	1,606	1,626
<b>6</b>	1,511	1,620	1,535	1,600	1,529	1,542	1,617	1,622	1,621	1,647	1,633
<b>7</b>	1,490	1,505	1,604	1,523	1,585	1,515	1,523	1,599	1,604	1,604	1,628
<b>8</b>	1,465	1,502	1,514	1,618	1,536	1,599	1,524	1,533	1,609	1,613	1,613
<b>9</b>	1,541	1,511	1,545	1,564	1,669	1,587	1,653	1,578	1,585	1,662	1,666
<b>10</b>	1,503	1,548	1,517	1,556	1,573	1,671	1,593	1,661	1,584	1,597	1,673
<b>11</b>	1,485	1,431	1,471	1,440	1,486	1,482	1,582	1,512	1,574	1,506	1,505
<b>12</b>	1,463	1,509	1,455	1,505	1,458	1,509	1,505	1,602	1,533	1,600	1,528
<b>K-6</b>	10,758	10,881	10,897	11,006	11,040	11,169	11,320	11,418	11,506	11,584	11,629
<b>7-8</b>	2,955	3,007	3,118	3,141	3,121	3,114	3,047	3,132	3,213	3,217	3,241
<b>9-12</b>	5,992	5,992	5,988	6,064	6,186	6,249	6,334	6,354	6,276	6,365	6,372
<b>K-12</b>	19,705	19,887	20,004	20,211	20,347	20,533	20,701	20,903	20,994	21,166	21,242
<b>Residing in District (Residence-Based)</b>											
<b>Out-of-District</b>											
<b>K-6</b>	263	266	266	269	270	273	277	279	281	283	284
<b>7-8</b>	85	86	90	90	90	90	88	90	92	93	93
<b>9-12</b>	272	273	272	275	281	284	288	289	285	289	289
<b>K-12</b>	620	625	628	635	641	647	652	658	659	665	667
<b>Total Attendance (Building Attendance)</b>											
<b>K-6</b>	11,021	11,147	11,164	11,275	11,310	11,442	11,597	11,697	11,787	11,867	11,913
<b>7-8</b>	3,040	3,093	3,208	3,232	3,210	3,204	3,135	3,222	3,306	3,310	3,335
<b>9-12</b>	6,264	6,272	6,260	6,340	6,467	6,533	6,622	6,643	6,561	6,654	6,661
<b>K-12</b>	20,325	20,512	20,632	20,846	20,988	21,180	21,353	21,561	21,653	21,831	21,909

Shading Key:

= The 2018-19 numbers included above are from the 10/3/18 SIS, and differ slightly from the official Oct. 1st enrollment counts (OSP), which appear elsewhere in this report.

Annual District attendance area residence-based forecasts grade totals through 2028. Shown are 2018 actual counts of District students residing in each attendance area (October), as well as October 1<sup>st</sup> projections for each subsequent year. Forecasts of out-of-District students by grade group are also included, as well as building attendance forecasts by grade group (the sum of residence-based and out-of-District). Excludes PS, and high school EDCAP/Open Doors and full-time Running Start students.

**Figure 16 – 2018-2019 Elementary School Enrollment Patterns  
Residence-Attendance Matrix**

School of Attendance Attendance Area	Residence Count	Beverly ES	Brier ES	Cedar Valley ES	Cedar Way ES	Chase Lake ES	College Place ES	Edmonds ES	Hazelwood ES	Hilltop ES	Lyndale ES	Lynnwood ES	Martha Lake ES	Meadowdale ES	Mountlake Terrace ES	Oak Heights ES
Beverly ES	624	501	2	4	1	5	1	3	2	0	7	2	0	26	1	1
Brier ES	504	0	381	0	4	5	0	0	5	22	0	1	0	1	2	0
Cedar Valley ES	491	2	3	398	4	8	11	3	5	2	3	3	0	10	7	1
Cedar Way ES	669	0	5	3	505	15	3	0	27	4	3	3	0	1	8	0
Chase Lake ES	344	0	1	1	0	270	6	6	0	0	2	1	0	2	4	0
College Place ES	621	0	5	10	6	22	480	18	2	2	4	0	1	4	3	0
Edmonds ES	443	1	1	0	1	7	3	284	4	0	1	0	0	4	3	0
Hazelwood ES	506	2	10	1	5	5	1	3	384	4	2	3	12	1	1	0
Hilltop ES	586	0	5	0	1	4	0	1	5	499	0	1	1	1	3	0
Lynnwood ES	488	5	2	2	4	4	4	4	0	0	385	1	0	8	0	0
Lynnwood ES	616	3	0	5	4	6	0	1	4	0	1	488	1	2	5	4
Martha Lake ES	496	4	1	0	4	0	1	0	6	5	3	0	429	1	1	0
Meadowdale ES	507	22	2	3	0	0	0	2	4	0	1	0	0	402	2	1
Mountlake Terrace ES	424	1	5	0	1	13	0	0	0	0	0	3	0	3	343	0
Oak Heights ES	697	7	2	0	2	2	0	0	3	3	0	6	3	1	0	601
Seaview ES	465	3	0	0	1	2	0	10	1	0	1	0	0	6	0	1
Sherwood ES	661	0	3	0	0	11	0	5	0	0	0	0	0	0	0	0
Spruce ES	675	3	1	7	10	2	0	0	3	2	6	7	0	16	4	0
Terrace Park ES	273	0	2	0	1	2	0	1	2	0	0	2	0	1	5	1
Westgate ES	668	0	0	1	2	16	1	5	0	0	4	0	0	1	6	0
<b>K-6 Subtotals</b>	<b>10,758</b>	<b>554</b>	<b>431</b>	<b>435</b>	<b>556</b>	<b>399</b>	<b>511</b>	<b>346</b>	<b>457</b>	<b>543</b>	<b>423</b>	<b>521</b>	<b>447</b>	<b>495</b>	<b>396</b>	<b>610</b>
<b>Out of District</b>	<b>263</b>	<b>15</b>	<b>10</b>	<b>8</b>	<b>4</b>	<b>10</b>	<b>3</b>	<b>4</b>	<b>8</b>	<b>2</b>	<b>5</b>	<b>4</b>	<b>8</b>	<b>16</b>	<b>6</b>	<b>7</b>
<b>K-6 Totals</b>	<b>11,021</b>	<b>569</b>	<b>441</b>	<b>443</b>	<b>560</b>	<b>409</b>	<b>514</b>	<b>350</b>	<b>465</b>	<b>545</b>	<b>428</b>	<b>525</b>	<b>455</b>	<b>511</b>	<b>402</b>	<b>617</b>
<b>Attending Non-Resident Total</b>	<b>2,565</b>	<b>68</b>	<b>60</b>	<b>45</b>	<b>55</b>	<b>139</b>	<b>34</b>	<b>66</b>	<b>81</b>	<b>46</b>	<b>43</b>	<b>37</b>	<b>26</b>	<b>109</b>	<b>59</b>	<b>16</b>
<b>Transfer In Rates</b>	<b>23.3%</b>	<b>12.0%</b>	<b>13.6%</b>	<b>10.2%</b>	<b>9.8%</b>	<b>34.0%</b>	<b>6.6%</b>	<b>18.9%</b>	<b>17.4%</b>	<b>8.4%</b>	<b>10.0%</b>	<b>7.0%</b>	<b>5.7%</b>	<b>21.3%</b>	<b>14.7%</b>	<b>2.6%</b>

All values based on the 10/03/2018 Student Information System.  
Residence counts are based on current attendance area boundaries, as of the 2018-19 school year.

**Figure 16 – 2018-2019 Elementary School Enrollment Patterns  
Residence-Attendance Matrix**

School of Attendance Attendance Area	Seaview ES	Sherwood ES	Spruce ES	Terrace Park ES	Westgate ES	Challenge	Contracted School	Edmonds Heights	Madrona	Maplewood Co Op	Unassigned School	Non-Residence Attendance Total	Transfer Out Rates
Beverly ES	5	1	7	5	2	10	0	10	16	12	0	123	19.7%
Brier ES	0	3	0	5	1	22	0	18	12	22	0	123	24.4%
Cedar Valley ES	8	1	1	1	0	7	0	2	4	7	0	93	18.9%
Cedar Way ES	3	3	0	9	3	27	0	13	19	15	0	164	24.5%
Chase Lake ES	3	3	0	1	4	4	0	6	20	10	0	74	21.5%
College Place ES	6	2	1	5	7	7	1	7	13	15	0	141	22.7%
Edmonds ES	3	6	0	2	0	28	0	11	38	48	0	159	35.9%
Hazelwood ES	4	0	0	1	4	13	0	13	23	14	0	122	24.1%
Hilltop ES	2	0	0	6	0	25	0	0	17	11	0	87	14.8%
Lynndale ES	12	1	0	1	1	8	1	7	16	22	0	103	21.1%
Lynnwood ES	4	1	4	2	2	18	0	5	21	34	1	128	20.8%
Martha Lake ES	1	0	0	5	0	22	0	0	6	7	0	67	13.5%
Meadowdale ES	9	0	1	2	2	9	0	6	18	21	0	105	20.7%
Mountlake Terrace ES	0	4	0	9	3	12	0	5	17	5	0	81	19.1%
Oak Heights ES	2	0	1	2	1	17	0	7	28	9	0	96	13.8%
Seaview ES	364	0	1	4	1	14	0	11	18	27	0	101	21.7%
Sherwood ES	1	486	0	2	8	20	0	17	70	37	1	175	26.5%
Spruce ES	3	3	552	3	5	10	2	2	23	10	1	123	18.2%
Terrace Park ES	0	2	0	212	1	13	0	7	18	3	0	61	22.3%
Westgate ES	2	13	0	7	492	28	0	12	50	27	1	176	26.3%
<b>K-6 Subtotals</b>	<b>432</b>	<b>529</b>	<b>568</b>	<b>284</b>	<b>537</b>	<b>314</b>	<b>4</b>	<b>159</b>	<b>447</b>	<b>356</b>	<b>4</b>	<b>--</b>	<b>--</b>
<b>Out of District</b>	<b>6</b>	<b>5</b>	<b>12</b>	<b>13</b>	<b>3</b>	<b>2</b>	<b>0</b>	<b>91</b>	<b>16</b>	<b>5</b>	<b>0</b>	<b>--</b>	<b>--</b>
<b>K-6 Totals</b>	<b>438</b>	<b>534</b>	<b>580</b>	<b>297</b>	<b>540</b>	<b>316</b>	<b>4</b>	<b>250</b>	<b>463</b>	<b>361</b>	<b>4</b>	<b>--</b>	<b>--</b>
<b>Attending Non-Resident Total</b>	<b>74</b>	<b>48</b>	<b>28</b>	<b>85</b>	<b>48</b>	<b>316</b>	<b>4</b>	<b>250</b>	<b>463</b>	<b>361</b>	<b>4</b>	<b>--</b>	<b>--</b>
<b>Transfer In Rates</b>	<b>16.9%</b>	<b>9.0%</b>	<b>4.8%</b>	<b>28.6%</b>	<b>8.9%</b>	<b>100.0%</b>	<b>100.0%</b>	<b>100.0%</b>	<b>100.0%</b>	<b>100.0%</b>	<b>100.0%</b>	<b>100.0%</b>	<b>--</b>

All values based on the 10/03/2018 Student Information System.

Residence counts are based on current attendance area boundaries, as of the 2018-19 school year.

**Figure 17 – 2018-2019 Middle School Enrollment Patterns  
Residence-Attendance Matrix**

School of Attendance Attendance Area	Residence Count	School of Attendance										Non-Residence Attendance Total	Transfer Out Rates
		Alderwood MS	Brier Terrace MS	College Place MS	Meadowdale MS	Contracted School	Edmonds eLearning Academy	Edmonds Heights	Madrona	Maplewood Co Op	Unassigned School		
Alderwood MS	937	790	57	11	18	3	1	11	26	20	0	147	15.7%
Brier Terrace MS	628	10	560	9	4	2	2	13	14	14	0	68	10.8%
College Place MS	553	4	29	394	8	1	2	16	56	42	1	159	28.8%
Meadowdale MS	837	4	31	14	698	1	1	14	39	35	0	139	16.6%
<b>7-8 Subtotals</b>	<b>2,955</b>	<b>808</b>	<b>677</b>	<b>428</b>	<b>728</b>	<b>7</b>	<b>6</b>	<b>54</b>	<b>135</b>	<b>111</b>	<b>1</b>	<b>---</b>	<b>---</b>
<b>Out of District</b>	<b>85</b>	<b>10</b>	<b>7</b>	<b>6</b>	<b>7</b>	<b>0</b>	<b>2</b>	<b>46</b>	<b>6</b>	<b>1</b>	<b>0</b>	<b>---</b>	<b>---</b>
<b>7-8 Totals</b>	<b>3,040</b>	<b>818</b>	<b>684</b>	<b>434</b>	<b>735</b>	<b>7</b>	<b>8</b>	<b>100</b>	<b>141</b>	<b>112</b>	<b>1</b>	<b>---</b>	<b>---</b>
<b>Attending Non-Resident Total</b>	<b>598</b>	<b>28</b>	<b>124</b>	<b>40</b>	<b>37</b>	<b>7</b>	<b>8</b>	<b>100</b>	<b>141</b>	<b>112</b>	<b>1</b>	<b>---</b>	<b>---</b>
<b>Transfer In Rates</b>	<b>19.7%</b>	<b>3.4%</b>	<b>18.1%</b>	<b>9.2%</b>	<b>5.0%</b>	<b>100.0%</b>	<b>100.0%</b>	<b>100.0%</b>	<b>100.0%</b>	<b>100.0%</b>	<b>100.0%</b>	<b>---</b>	<b>---</b>

All values based on the 10/03/2018 Student Information System.  
Residence counts are based on current attendance area boundaries, as of the 2018-19 school year.

**Figure 18 – 2018-2019 High School Enrollment Patterns  
Residence-Attendance Matrix**

School of Attendance Attendance Area	Residence Count	School of Attendance										Non-Residence Attendance Total	Transfer Out Rates
		Edmonds HS	Woodway HS	Lynwood HS	Meadowdale HS	Mountlake Terrace HS	Contracted School	Edmonds Career Access	Edmonds eLearning Academy	Edmonds Heights	Scriber Lake		
Edmonds-Woodway HS	1,511	1,255	7	19	52	4	56	25	33	60	0	256	16.9%
Lynwood HS	1,695	85	1,311	42	119	3	29	17	29	59	1	384	22.7%
Meadowdale HS	1,852	146	36	1,440	72	4	30	27	33	64	0	412	22.2%
Mountlake Terrace HS	1,312	88	60	20	1,024	2	21	17	32	48	0	288	22.0%
<b>9-12 Subtotals</b>	<b>6,370</b>	<b>1,574</b>	<b>1,414</b>	<b>1,521</b>	<b>1,267</b>	<b>13</b>	<b>136</b>	<b>86</b>	<b>127</b>	<b>231</b>	<b>1</b>	<b>--</b>	<b>--</b>
<b>Out of District</b>	<b>437</b>	<b>37</b>	<b>40</b>	<b>28</b>	<b>61</b>	<b>0</b>	<b>131</b>	<b>9</b>	<b>95</b>	<b>36</b>	<b>0</b>	<b>--</b>	<b>--</b>
<b>9-12 Totals</b>	<b>6,807</b>	<b>1,611</b>	<b>1,454</b>	<b>1,549</b>	<b>1,328</b>	<b>13</b>	<b>267</b>	<b>95</b>	<b>222</b>	<b>267</b>	<b>1</b>	<b>--</b>	<b>--</b>
<b>Attending Non-Resident Total</b>	<b>1,421</b>	<b>1,611</b>	<b>143</b>	<b>109</b>	<b>304</b>	<b>13</b>	<b>267</b>	<b>95</b>	<b>222</b>	<b>267</b>	<b>1</b>	<b>--</b>	<b>--</b>
<b>Transfer In Rates</b>	<b>20.9%</b>	<b>100.0%</b>	<b>9.8%</b>	<b>7.0%</b>	<b>22.9%</b>	<b>100.0%</b>	<b>100.0%</b>	<b>100.0%</b>	<b>100.0%</b>	<b>100.0%</b>	<b>100.0%</b>	<b>100.0%</b>	<b>100.0%</b>

\*\*\*Running Start students are included in the above table based on their school of attendance as coded within the SIS, regardless of partial or full-time participation in the program. This is in contrast to other portions of this report that omit full-time participating students.

All values based on the 10/03/2018 Student Information System.

Residence counts are based on current attendance area boundaries, as of the 2018-19 school year.

**Figure 19 – Total District-wide Forecast Error, Prior Forecasts Prepared by FLO**

School Year	Actual Enroll.	K-12 Medium-Growth Series Enrollment Forecasts by Base Year															
		'15-'16	'16-'17	'17-'18	'18-'19	'19-'20	'20-'21	'21-'22	'22-'23	'23-'24	'24-'25	'25-'26	'26-'27				
2015-16	20,249																
2016-17	20,420	20,464															
2017-18	20,304	20,645	20,432														
2018-19	20,307	20,717	20,670	20,461													
2019-20	-	20,975	20,950	20,630													
2020-21	-	21,271	21,273	20,845													
2021-22	-	21,405	21,498	21,116													
2022-23	-	21,585	21,637	21,311													
2023-24	-	21,843	21,794	21,657													
2024-25	-	21,955	22,000	21,748													
2025-26	-	22,047	22,128	21,895													
2026-27	-	-	22,206	21,974													
2027-28	-	-	-	22,153													
School Year	Percent Error in Medium-Growth Series Enrollment Forecasts by Base Year																
2016-17		'15-'16	'16-'17	'17-'18	'18-'19	'19-'20	'20-'21	'21-'22	'22-'23	'23-'24	'24-'25	'25-'26	'26-'27				
2017-18		0.2%															
2018-19		1.7%	0.6%														
2019-20		2.0%	1.8%	0.8%													
2020-21		-	-	-													
2021-22		-	-	-													
2022-23		-	-	-													
2023-24		-	-	-													
2024-25		-	-	-													
2025-26		-	-	-													
2026-27		-	-	-													
2027-28		-	-	-													

Comparison of actual and forecasted total District October enrollment for prior years, with calculated percent error. All numbers exclude PS and EDCAP/Open Doors and full-time Running Start students. Note that the base year 2016–17 forecasts have been amended to exclude high school full-time Running Start students, which were inadvertently included in the December 9, 2016 report.



**Figure 20 – Grade Groups Forecast Error, Prior Forecasts Prepared by FLO**

Grade Group	2018-19 Actual Enroll.	2018-19 Medium-Growth Series Enrollment Forecasts by Base Year											
		2017-18 (1 yr.)		2016-17 (2 yr.)		2015-16 (3 yr.)		2014-15 (4 yr.)					
		Forecast	Error	Forecast	Error	Forecast	Error	Forecast	Error	Forecast	Error	Forecast	Error
K-6	11,009	11,149	1.3%	11,346	3.1%	11,194	1.7%	-	-	-	-	-	-
7-8	3,034	2,991	-1.4%	3,121	2.9%	3,078	1.5%	-	-	-	-	-	-
9-12	6,264	6,321	0.9%	6,203	-1.0%	6,445	2.9%	-	-	-	-	-	-
<b>Total</b>	<b>20,307</b>	<b>20,461</b>	<b>0.8%</b>	<b>20,670</b>	<b>1.8%</b>	<b>20,717</b>	<b>2.0%</b>						
<b>Mean Absolute</b>	<b>Percent Error</b>		<b>1.2%</b>		<b>2.3%</b>		<b>2.0%</b>						

Comparison of actual and projected total District October enrollment for prior years, with calculated percent error. All numbers exclude PS and high school EDCAP/Open Doors and full-time Running Start students. Note that the base year 2016—17 projections have been amended to exclude high school full-time Running Start students, which were inadvertently included in the December 9, 2016 report.

**Appendix B**  
**Determination of Nonsignificance**

**DETERMINATION OF NONSIGNIFICANCE**  
**Edmonds School District Capital Facilities Plan**

**DESCRIPTION OF PROPOSAL:** This threshold determination pertains to environmental impacts associated with the Edmonds School Board adoption of its Capital Facilities Plan 2020-2025 and its incorporation into the Snohomish County Growth Management Comprehensive Plan pursuant to the requirements of Snohomish County Code 30.66C. Following adoption of the updated Capital Facilities Plan, it is anticipated that it will also be incorporated by reference into the comprehensive plans of the cities of Lynnwood, Edmonds, Mountlake Terrace, Brier, and the Town of Woodway. Adoption of the Capital Facilities Plan does not involve actual construction of schools or other facilities. These will be reviewed in more detail at the time of their proposed construction.

**PROPONENT:** Edmonds School District No. 15

**LOCATION OF PROPOSAL:** The Edmonds School District covers an area of approximately 36 square miles and includes the incorporated cities of Edmonds, Brier, Lynnwood, and Mountlake Terrace, as well as the Town of Woodway and some unincorporated areas of south Snohomish County. The District is generally bounded by King County on the south, Puget Sound on the west, 148<sup>th</sup> Street Southwest on the north, and Everett and Northshore School Districts on the east.

**LEAD AGENCY:** Edmonds School District No. 15

The lead agency for this Capital Facilities Plan adoption has determined that it does not have a probable significant adverse impact on the environment. An environmental impact statement (EIS) is not required under RCW 43.21C.030(2)(c). This determination assumes compliance with State law and ordinances related to general environmental protection. This decision was made after review of a completed environmental checklist and other information on file with the lead agency. This information is available to the public on request.

This DNS is issued under WAC 197-11-340(2). The lead agency will not act on this plan adoption proposal for 14 days from the date below. Comments may be submitted to the Responsible Official as named below. Board adoption is scheduled for September 8, 2020.

**RESPONSIBLE OFFICIAL:** Lydia Sellie  
**POSITION/TITLE:** Executive Director of Business & Finance  
**ADDRESS:** Edmonds School District No. 15  
20420 – 68<sup>th</sup> Avenue West  
Lynnwood, WA 98036-7400  
**PHONE:** 425-431-7334

**PUBLISHED:** The Everett Herald – August 7, 2020

There is no agency appeal.

**Appendix C**

**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, multifamily/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 180 calendar days prior to their desired effective date.
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.

**EVERETT SCHOOL DISTRICT No. 2**

# **CAPITAL FACILITIES PLAN**

## **2020-25**



**Adopted: August 25, 2020**

**EVERETT SCHOOL DISTRICT NO. 2**

**RESOLUTION NO. 1240**

**Adoption of Capital Facilities Plan 2020-25**

A Resolution of the Board of Directors (the "Board") of the Everett School District No. 2 (the "District") to adopt the Capital Facilities Plan 2020-25 (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 Board 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, August 2012, August 2014, August 2016, September 2016, and August 2018 the Board approved Resolutions 700, 742, 799, 860, 907, 1004, 1046, 1095, 1132, 1138, and 1180 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 Plans 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 Board 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:**

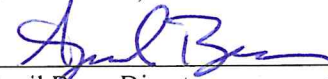
1. The Capital Facilities Plan 2020-25 is hereby adopted by the Board; and
2. The Snohomish County Council is hereby requested to adopt the Plan by reference as part of the capital facilities element of the County's General Policy Plan; and
3. The cities of Mill Creek and Everett are hereby requested to adopt the Plan by reference as part of the Capital Facilities Plan elements of their respective General Policy Plans.

**ADOPTED** this 25th day of August 2020 and authenticated by the signatures affixed below.

**BOARD OF DIRECTORS:**

  
\_\_\_\_\_  
Caroline Mason, President

  
\_\_\_\_\_  
Pam LeSesne, Vice President

  
\_\_\_\_\_  
April Berg, Director

  
\_\_\_\_\_  
Traci Mitchell, Director

  
\_\_\_\_\_  
Andrew Nicholls, Director

ATTESTED BY:

  
\_\_\_\_\_  
Dr. Ian Saltzman  
Secretary, Board of Directors



**CAPITAL FACILITIES PLAN  
2020-25  
EVERETT SCHOOL DISTRICT No. 2**

**BOARD OF DIRECTORS**

**Caroline Mason, President  
Pam LeSesne, Vice President  
April Berg, Director  
Traci Mitchell, Director  
Andrew Nicholls, Director**

**SUPERINTENDENT**

**Dr. Ian Saltzman**



**Adopted: August 25, 2020**

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

### 2020-25

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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, 2020-2025.

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 K-5, middle 6-8, and high 9-12).
- An inventory of existing capital facilities owned by the district, showing the locations, sizes 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) as of October 1 of the year indicated. The district implemented full-day kindergarten at all schools during the 2016-17 school year. For the purpose of this CFP, kindergarten through grade twelve students are considered 1.0 FTE. The FTE enrollment and Head Count (HC) enrollment are equivalent.

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

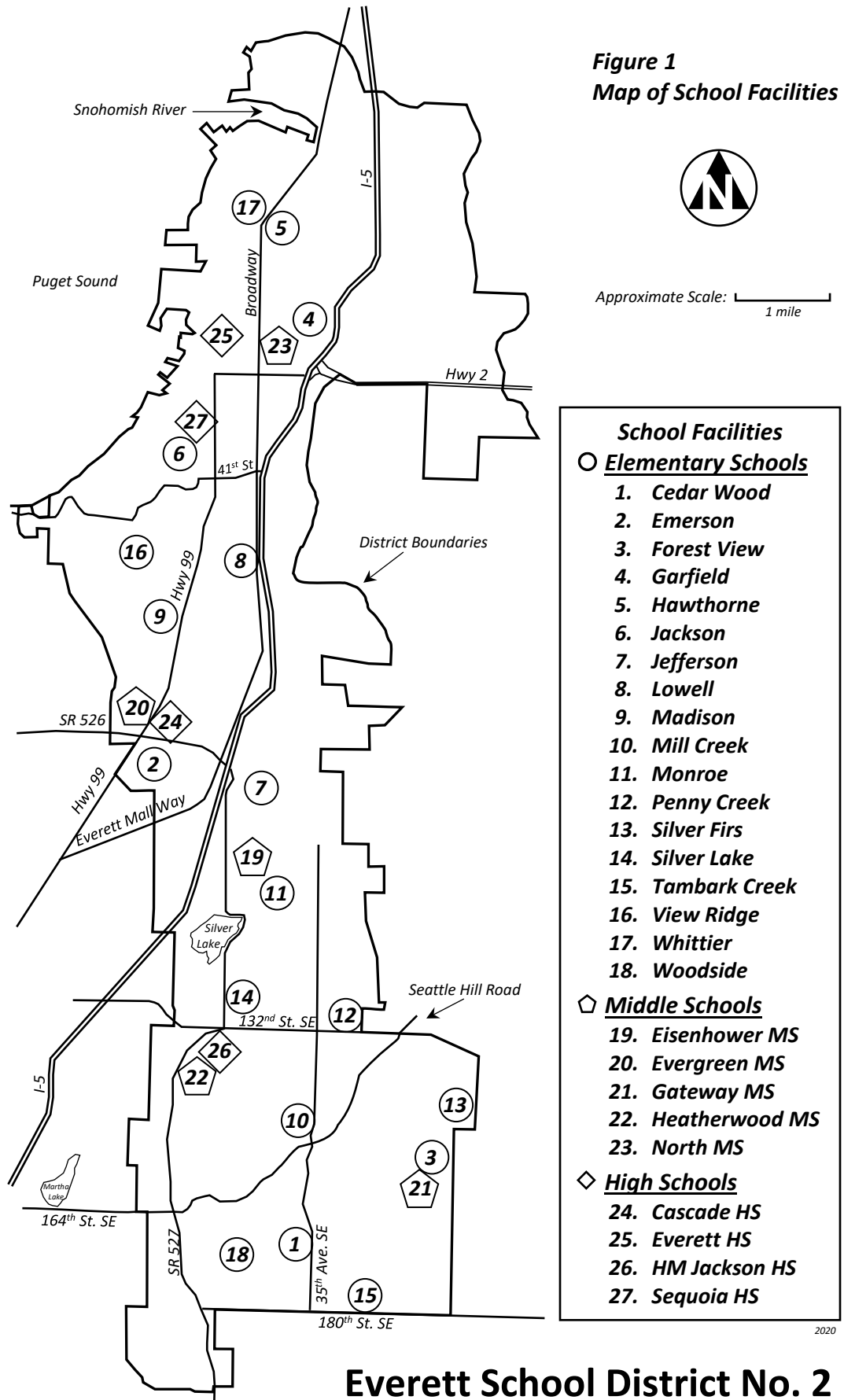
The Everett School District stretches approximately fifteen miles from its northernmost boundary at the Union Slough to its southernmost boundary at 194th Street S.E. The average width is a little more than two and a half miles. The district covers an area of approximately 39 square miles. The district 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 2019 is estimated at 149,372 (Snohomish County GMA Population Forecast).

The district serves 20,143 students FTE (October 2019 – OSPI Report 1049) in seventeen elementary schools, five middle schools, three comprehensive high schools, one alternative high school, and 139 portable classrooms. The full and part-time district staff is approximately 2,500.

### **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) finding space to implement new state initiatives: K-3 class size reduction (17:1 student to teacher ratio) and Career-Ready & College-Ready Graduation Requirements (24 credits – additional fine arts and lab science); 2) the need to construct new facilities and building additions to meet student enrollment growth; 3) the need to upgrade older facilities so they can continue to serve students in the decades ahead; and 4) the availability of real property appropriate for anticipated future school facilities' needs.

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



**Everett School District No. 2**

**Section 2**

**Educational Program Standards**

## SECTION 2: EDUCATIONAL PROGRAM STANDARDS

### Educational Program Standards – District wide

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 initiatives as well as community expectations may affect how classroom space is used. The district has in recent years implemented full-day kindergarten and reduced class sizes for grades K-3, all as required by the state legislature. Traditional educational programs offered by the Everett School District are supplemented by nontraditional or specialized programs.

Examples of specialized teaching stations and programs:

- Accelerated Learning Support (ALS)
- Advanced Placement
- Athletics, Health and Fitness
- Career and Technical Education
- Contract Learning
- Computer Labs
- Counseling (career and mental health)
- Early Childhood Educational Assistance Program (ECEAP)
- English Language development (EL)
- Elementary Music (designated classroom)
- Health Education
- Health Services
- High school credit class offered at middle schools
- Highly Capable Programs
- Intervention Programs
- Learning Assistance Programs
- Leadership and Activities
- Library Instruction
- Online High School
- Partnerships
  - Lighthouse Cooperative
  - PTSA
  - Port Gardner Parent Partnership
  - Mental Health providers
  - Natural Leaders
- Readiness to Learn Parent Center
- Robotics
- Science Resource Center



- Special Education
  - Achieve (behavior support)
  - Deaf and Hard of Hearing Specialists
  - Developmental Kindergarten
  - Developmental Pre-School
  - Extended Resource Room
  - Life Skills
  - Occupational / Physical Therapy
  - 18-21 programs
    - GOAL – Gaining Ownership of Adult Life
    - STRIVE – Students Transitioning Responsibly into Vocational Experiences
  - Resource Room
  - School Psychologists
  - Speech and Hearing Therapy
  - Vision Impaired Service
- Technology Instruction
- Time-Out Room (In-School Suspension)
- Title I Programs
  - Reading
  - Math
- Career and Technical Education (CTE)
  - Auto Shop
  - Business and Marketing
  - Health and Human Services
  - Horticulture, Agriculture, and Floriculture
  - Technology and Industry
- Wireless Computer Carts

These specialized or nontraditional educational programs can have a significant impact on the student capacity of school facilities. Variations in student capacity between schools are often a result of the number of specialized programs offered at specific schools. These specialized programs require classroom space, which can reduce the permanent capacity of the buildings housing these programs. For example, some students leave their regular classroom for a period of time to receive instruction in these specialized programs. Newer schools within the district have been designed to accommodate many of these programs. However, older schools often require space modifications to accommodate specialized 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, specialized 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 changes to the revised educational program standards.

### Educational Program Standards - Elementary Schools

- School capacity is determined using the follow:
 

<u>Students per room</u>	<u>Grade level / Program</u>
20.5	Kindergarten
20.5	General Education - Grades 1-3
24	General Education - Grades 4-5
10	Special Education - Pre-School (self-contained)
10	Special Education - Kindergarten (self-contained)
10	Special Education - Achieve (behavior support)
15	Special Education - Extended Resource Room
10	Special Education - Life Skills
- Students are provided music and technology instruction.
- At least one Special Education Resource Room is part of the curriculum.
- Design capacity for new schools:
  - 600 students
- Actual capacity of individual schools may vary depending on the educational programs offered and/or housed at a particular school.

### Educational Program Standards – Middle Schools 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

- School capacity is determined using the follow:
 

<u>Students per room</u>	<u>Grade level / Program</u>
24	General Education - Grades 6-8
24	Special Education - Resource Room
10	Special Education - Achieve (behavior support)
15	Special Education - Extended Resource Room
10	Special Education - Life Skills
18	English Language Learner (ELL)

#### High School

- School capacity is determined using the follow:
 

<u>Students per room</u>	<u>Grade level / Program</u>
24	General Education - Grades 9-12
24	Special Education - Resource Room
10	Special Education - Achieve (behavior support)
15	Special Education - Extended Resource Room
10	Special Education - Life Skills
18	English Language Learner (ELL)

## Middle School and/or High School

- Students are also provided educational opportunities such as:
  - Art Labs
  - Auto Shop (high school only)
  - Challenge, College in the High School, and Advanced Placement Program
  - Computer Labs
  - Drama rooms (high school only)
  - Health and Fitness
  - Marketing (high school only)
  - Music rooms
  - Navy Junior Reserve Officer Training Corps (high school only)
  - Science / STEM Labs
- Design capacity for new schools:
  - Middle schools = 825 students
  - High schools = 1,500 students
- 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**
  - 24 Kindergarten
  - 25 Grades 1-3 General Education
  - 26 Grade 4 General Education
  - 27 Grade 5 General Education
  - 29 Grades 6-8 General Education
  - 30 Grades 9-12 General Education
- **2019 Actual Class Size Average - based on the October 1, 2019 count of student enrollment**
  - 20.0 Kindergarten
  - 21.4 Grades 1-3 General Education
  - 24.9 Grades 4-5 General Education
  - 24.1 Grades 6-8 General Education
  - 22.8 Grades 9-12 General Education

## **School Boundary Changes**

The Everett School District recognizes that school boundaries need to be modified occasionally to respond to changes in student enrollment and/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 additional classroom space will occur beginning with the 2020-21 school year. The district will institute a limited re-configuration of high school boundaries in response to significant enrollment growth in the southern end of the district. The re-configuration will be phased in over four years. The district recently completed the process of adjusting elementary school boundaries in preparation of opening Tambark Creek Elementary in the fall of 2019.

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

- Aerospace & Advanced Manufacturing Pathway
- Medical & Health Pathway
- Information & Communication Pathway
- STEM (Science, Technology, Engineering and Mathematics), CTE (Career and Technical Education) and AP (Advanced Placement) program growth
- Flexible space for multiple uses – “maker” spaces, robotics, project-based learning, etc.
- Extended learning opportunities – after-school and/or summer activities
- Expansion of high school credit class offerings at middle schools (science, languages, etc.)
- 1:1 technology for students
- Early learning programs - Birth to 3 years and 3 to 5 years
- Industry pathway partnerships
- Post high school support opportunities
- Technology accessibility for community
- 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 STEM materials
- Expanded music offerings such as orchestra (strings)
- Cost effective solutions for serving high-need students that are currently outsourced to programs, such as the NW Regional Learning Center and Denny Youth Center

**Section 3**

**Capital Facilities Inventory**

### **SECTION 3: 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 educational program standards outlined in Section 2. A map showing locations of district school facilities is provided in Figure 1 on page 1-4.

#### **Schools**

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

OSPI calculates school capacity by dividing gross square footage of a building by a standard square footage per student. OSPI uses the following in their calculations: 90 s.f. per kindergarten through sixth grade student, 117 s.f. per seven and eight grade student, 130 sq. ft. per nine through twelve grade student, and 144 sq. ft. per disabled student (WAC 392-343-035). 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.

This method is not considered an accurate reflection of the actual capacity required to accommodate the educational programs of each individual school and/or district.

For this CFP, capacity is based on the number of teaching stations within each building and the space requirements of the specific educational program as described in Section 2. The school capacity inventory is summarized in Table 1.

#### **Portables**

Portables are used as interim classroom space to house students until permanent classroom facilities can be provided as well as to prevent overbuilding. Portables are not a solution for housing students on a permanent basis. The typical useful life a portable is 30-35 years. The ages of the district's portables range from 2 to 35 years. The portables capacity inventory is summarized in Table 2.

For this CFP, the 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.

## Undeveloped Land

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

- 35th Street & Grand Avenue
  - 1.38 acres
  - Long term lease with the City of Everett - Doyle Park
- 36<sup>th</sup> Street & Norton Avenue
  - 2.96 acres
  - Long term lease with Housing Hope
- Cadet Way Property
  - 9.25 acres
  - Located north of Jefferson ES
- Seattle Hill Road & State Route 527
  - 18.94 acres
  - Future school site
- 180th Street SE
  - 24.81 acres
  - Future site of comprehensive high school #4
- Strumme Road
  - 10.55 acres
  - Future site of elementary school #19

**Table 1  
School Capacity Inventory**

School Name	Site Size (acres)	Building Area (Sq. Ft.) (1)	Teaching Stations General Education	Teaching Stations Special Education	2019 Permanent Student Capacity (2)	Teaching Stations Not Generating Capacity (3)
<b>Elementary Schools</b>						
Cedar Wood	14.40	55,454	21	2	454	3
Emerson	8.05	52,796	24	1	485	2
Forest View	15.30	66,629	24	1	530	3
Garfield	5.60	52,744	19	2	447	3
Hawthorne	8.84	72,395	26	4	589	4
Jackson	5.16	51,652	14	2	315	3
Jefferson (4)	18.81	55,154	19	3	443	2
Lowell	9.34	58,690	20	3	441	1
Madison	9.64	58,063	21	3	465	2
Mill Creek	9.69	55,646	23	2	533	1
Monroe	9.15	69,463	22	4	464	2
Penny Creek	13.90	64,882	29	2	637	2
Silver Firs	12.02	55,839	22	2	465	2
Silver Lake	11.09	56,774	19	2	409	4
Tambark Creek	18.64	83,665	28	2	608	3
View Ridge	9.47	66,154	24	2	538	3
Whittier	5.20	54,084	20	1	441	1
Woodside	10.84	54,055	16	1	341	1
<b>Totals:</b>	<b>195.14</b>	<b>1,084,139</b>	<b>391</b>	<b>39</b>	<b>8,605</b>	<b>42</b>
<b>Middle Schools</b>						
Eisenhower	19.67	107,252	34	5	913	
Evergreen	21.74	116,526	41	5	1,047	
Gateway	43.70	110,181	37	4	961	
Heatherwood	29.21	117,051	32	5	854	
North	10.66	101,770	35	6	935	
<b>Totals:</b>	<b>124.98</b>	<b>552,780</b>	<b>179</b>	<b>25</b>	<b>4,710</b>	<b>0</b>
<b>High Schools</b>						
Cascade	38.85	244,345	72	9	1,861	
Everett	11.12	280,459	78	8	2,023	
Jackson	42.79	247,043	72	9	1,879	
Sequoia (5)	3.02	67,007	17	1	432	
<b>Totals:</b>	<b>95.78</b>	<b>838,854</b>	<b>239</b>	<b>27</b>	<b>6,195</b>	<b>0</b>

415.90                      2,475,773

**Notes:**

- (1) Building areas do not include covered play areas
- (2) Permanent Student Capacity figures are based on Educational Program Standards - Section 3 and are exclusive of portables
- (3) Programs not generating capacity: computer labs, specialists (reading, art, science, etc.), elementary music, ECEAP, LAP, developmental pre-school, and elementary resource rooms
- (4) Jefferson Elementary School's acreage excludes adjacent undeveloped site of 9.81 acres
- (5) Sequoia High School's acreage excludes two nearby sites - playfield at 36th Street and Norton Avenue - 2.96 acres and Doyle Park at 35th Street and Grand Avenue - 1.38 acres



**Table 2  
Portable Capacity Inventory**

School Name	Teaching Stations General Education	Teaching Stations Special Education	2019 Portable Student Capacity (1)	Teaching Stations Not Generating Capacity (2)
<b>Elementary Schools</b>				
Cedar Wood	10		236	
Emerson	9		140	
Forest View	6		130	
Garfield				
Hawthorne	1		24	
Jackson	2	1	58	
Jefferson	5		113	
Lowell	3		65	4
Madison				
Mill Creek	6		123	
Monroe	4		96	
Penny Creek	4		96	
Silver Firs	3		72	
Silver Lake	9		216	2
Tambark Creek				
View Ridge	2		44	
Whittier	1		24	2
Woodside	11		250	1
<b>Totals:</b>	<b>76</b>	<b>1</b>	<b>1,687</b>	<b>9</b>
<b>Middle Schools</b>				
Eisenhower	7		156	
Evergreen	3	3	138	
Gateway	2		48	
Heatherwood	13		288	
North	0		0	
<b>Totals:</b>	<b>25</b>	<b>3</b>	<b>630</b>	<b>0</b>
<b>High Schools</b>				
Cascade	1		24	
Everett			0	
Jackson	17		408	
Sequoia			0	
<b>Totals:</b>	<b>18</b>	<b>0</b>	<b>432</b>	<b>0</b>

**Notes:**

- (1) Portable Student Capacity figures are based on Educational Program Standards - Section 3
- (2) Programs not generating capacity: computer labs, specialists (reading, art, science, etc.), elementary music, ECEAP, LAP, developmental pre-school, and elementary resource rooms

**Table 3  
Support Facility Inventory**

<b>Support Facility</b>	<b>Site Size (acres)</b>	<b>Building Area (Sq. Ft.)</b>
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
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>57.75</b>	<b>218,434</b>

**Note:**

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

**Section 4**

**Student Enrollment**

## **SECTION 4: STUDENT ENROLLMENT**

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

From the early 1970's through the early 1980's, student enrollment in the district was relatively constant. Beginning in 1983 student enrollment showed steady increase through 2001. Fueled by historically low interest rates and an active housing market in the Mill Creek East UGA Plan area, district enrollment rose again through 2009. Shortly thereafter district's enrollment felt the effect of economic recession. The district's enrollment declined through 2012. Since then the district's enrollment has rebounded and has increase each year since. Districtwide enrollment is projected to continue to increase through 2030. Enrollment forecasts from 2030 to 2035 are linked directly to OFM population forecasts and show a steady increase as well.

### **2018-2023 Enrollment Projections**

This CFP has been prepared using enrollment projections, for 2020 through 2025, as provided by W. Les Kendrick of Educational Data Solutions (Kendrick). This enrollment projection method was chosen because it uses a grade progression method (cohort survival analysis) that tracks the progress of students as they progress from grade to grade. 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 five years. 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. The Kendrick methodology is described in more detail in Appendix E. The Kendrick enrollment projections are presented in Tables 4, 5, and 6. All enrollment figures shown in this CFP are FTE as of October 1 of the year indicated.

For comparison purposes, Table 5 also contains enrollment forecasts from two other sources besides Kendrick. A historical cohort-survival projection prepared by OSPI (described in more detail in Appendix C) 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.

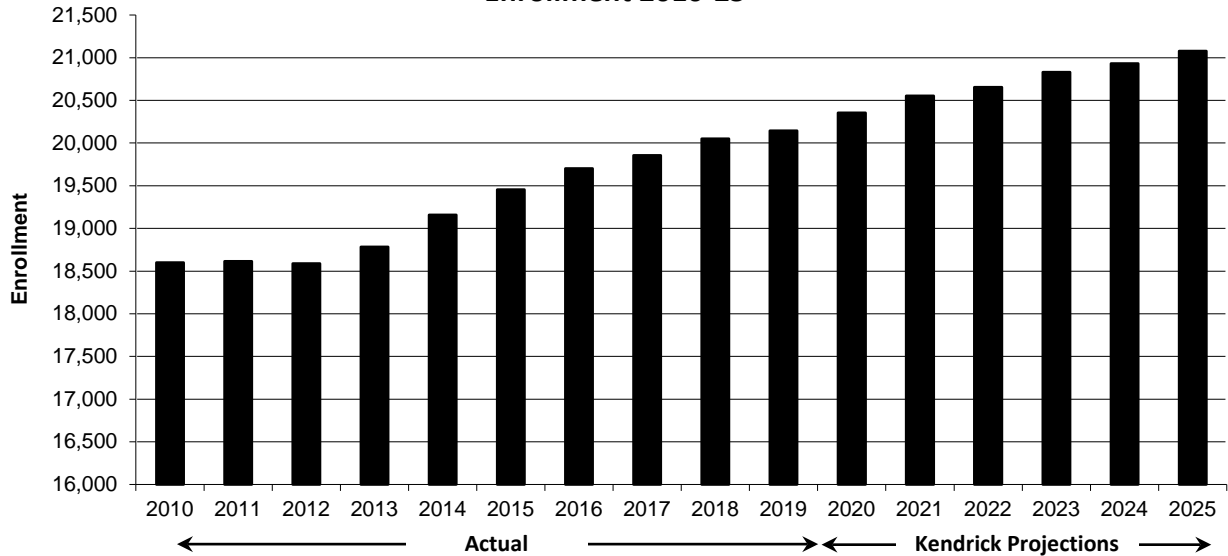
Based on the Kendrick enrollment projections, overall District enrollment will increase by 933 students over the next six years, reflecting an increase of approximately 4.63% over the 2019 enrollment levels. Table 6 provides a breakdown of the Kendrick enrollment projections by grade level span for every year from 2019 to 2025.

### **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. Kendrick produces projections through 2030 and OSPI produces projections through 2025. Therefore, enrollment projections for 2035 are presented in Table 7 using just the OFM Ratio Method.

The OFM projections for 2035 indicate that total enrollment in the District will increase by 5,111 students to 25,254 FTE, an increase of 25.37% over the 2019 enrollment levels. Enrollment in 2035 is projected to be higher than the 2019 capacities at all levels. An analysis of future capacities and facilities needs is provided in Section 5.

**Table 4  
Enrollment 2010-25**



**Table 5  
Comparison of Enrollment Projections 2020-25**

	<i>Actual *</i>							Projected Total Change 2019-25	Projected Percent Change 2019-25
	2019	2020	2021	2022	2023	2024	2025		
Kendrick		20,354	20,551	20,653	20,830	20,933	21,076	933	4.63%
OSPI	<b>20,143</b>	20,570	20,958	21,257	21,655	21,957	22,306	2,163	10.74%
OFM		20,570	20,958	21,257	21,655	21,957	22,306	2,163	10.74%

\* Actual enrolment from OSPI Form 1049

**Table 6  
Kendrick Actual Enrollment 2019 & Kendrick Projections 2020-25**

	<i>Actual</i>							Projected Total Change 2019-25	Projected Percent Change 2019-25
	2019	2020	2021	2022	2023	2024	2025		
Elementary	<b>9,816</b>	9,858	10,031	10,137	10,190	10,229	10,301	485	4.94%
Middle	<b>4,864</b>	4,882	4,824	4,711	4,724	4,856	4,883	19	0.39%
High	<b>5,463</b>	5,614	5,696	5,805	5,916	5,848	5,892	429	7.85%
Total:	<b>20,143</b>	<b>20,354</b>	<b>20,551</b>	<b>20,653</b>	<b>20,830</b>	<b>20,933</b>	<b>21,076</b>	<b>933</b>	<b>4.63%</b>

\* Actual enrolment from OSPI Form 1049

**Table 7  
OFM Ratio Enrollment Projections 2035**

	2035
Elementary School	12,300
Middle School	5,958
High School	6,996
Total:	25,254

**Table 8  
Permanent Facility Capacity Calculations 2019-2035**

<b>Elementary School</b>	<b>2019</b>	<b>2020</b>	<b>2021</b>	<b>2022</b>	<b>2023</b>	<b>2024</b>	<b>2025</b>	<b>2035</b>
Enrollment	<b>9,816</b>	9,858	10,031	10,137	10,190	10,229	10,301	12,300
Capacity Change Due to Construction Projects		0	0	220	308	176	264	2,727
Total Capacity (after construction projects)	<b>8,605</b>	8,605	8,605	8,825	9,133	9,309	9,573	12,300
Amount of Enrollment Above or (Below) Capacity	1,211	1,253	1,426	1,312	1,057	920	728	0

**Growth Related Capacity Need\* 485 / 1,696 = 28.60%**

Notes:

\* The Growth Related Capacity Need is misleading as it reads out growth-related capacity needs related to recent growth in the district.

<b>Middle School</b>	<b>2019</b>	<b>2020</b>	<b>2021</b>	<b>2022</b>	<b>2023</b>	<b>2024</b>	<b>2025</b>	<b>2035</b>
Enrollment	<b>4,864</b>	4,882	4,824	4,711	4,724	4,856	4,883	5,958
Capacity Change Due to Construction Projects		0	0	0	0	0	0	1,248
Total Capacity (after construction projects)	<b>4,710</b>	4,710	4,710	4,710	4,710	4,710	4,710	5,958
Amount of Enrollment Above or (Below) Capacity	154	172	114	1	14	146	173	0

**Growth Related Capacity Need\* 19 / 173 = 10.98%**

Notes:

\* The Growth Related Capacity Need is misleading as it reads out growth-related capacity needs related to recent growth in the district.

<b>High School</b>	<b>2019</b>	<b>2020</b>	<b>2021</b>	<b>2022</b>	<b>2023</b>	<b>2024</b>	<b>2025</b>	<b>2035</b>
Enrollment	<b>5,463</b>	5,614	5,696	5,805	5,916	5,848	5,892	6,996
Capacity Change Due to Construction Projects		0	0	0	0	0	0	1,500
Total Capacity (after construction projects)	<b>6,195</b>	6,195	6,195	6,195	6,195	6,195	6,195	7,695
Amount of Enrollment Above or (Below) Capacity	-732	-581	-499	-390	-279	-347	-303	-699

**Growth Related Capacity Need\* 0 / 0 = 0.00%**

Notes:

\* The Growth Related Capacity Need is misleading as it reads out growth-related capacity needs related to recent growth in the district.

**Section 5**

**Capital Facilities Plan**

## **SECTION 5: CAPITAL FACILITIES PLAN**

### **Facilities Needs 2020-25**

#### **Elementary School**

Currently, there are existing capacity deficiencies at the elementary school level. As of 2019, the district elementary enrollment was 1,211 students over the permanent building capacity. These students are currently housed in eighty-six (86) portable classrooms. Fifteen of the district's eighteen elementary schools are currently over their permanent building capacity. By 2025, the district is projected to grow by an additional 485 elementary students. The plan is to address these needs is through the construction of additional classroom space. The plan, as detailed in the CFP, is to construct 58 additional classrooms at eleven schools with a capacity of 968.

#### **Middle School**

There are existing capacity deficiencies at the middle school level. As of 2019, the district middle school enrollment was 154 students over the permanent building capacity. These students are currently housed in twenty-five (25) portable classrooms. Four of the district's five middle schools are over the permanent building capacity. The middle school enrollment is projected to continue to grow through 2025. The plan is to address the needs at individual schools through the purchase and placement of portables. The plan, as detailed in the CFP, is not to construct any new classroom space.

#### **High School**

District wide, the high schools do not indicate existing capacity deficiencies. Nonetheless, one of the district's three high schools is currently 298 students over the permanent building capacity. By 2025, the high school enrollment is projected to grow by an additional 429 students. At that point, two of the district's three high schools are projected to be over the permanent building capacity. The plan to address part of these needs, between 2020 and 2025, is through a modified attendance boundary adjustment and the purchase and placement of portables at the affected schools. The plan, as detailed in the CFP, is to not construct any new classroom space.

#### **District-wide**

##### Enrollment

The District-wide enrollment is projected to gradually increase each year from 2019 to 2025. During this same time period the anticipated enrollment levels will also exceed the 2019 capacities at the elementary, middle, and high school levels. This increase is seen in all areas of the district. A majority of the growth is being seen in the southern portion of the district. Enrollment and capacity projections are presented together for comparison purposes in Table 8 – *Permanent Facility Capacity Calculations 2019-2035*.

##### Land

Most of the recent growth in our student population has been, and is anticipated to continue to be, in the southern part of the district. Most of the developable land within the urban growth area in that part of the district has already been developed. This trend could increase the need for school facilities in this area beyond those described below.



State law, Vision 2040, and the Snohomish County Code each address school facilities planning. To help plan for anticipated growth in student enrollment in the southern part of the district, the district has been searching for developable assemblages of land large enough to site another elementary school in the vicinity. However, availability of undeveloped land within the southern part of Snohomish County's Urban Growth Area (UGA) is extremely limited.

The district finds it would be more efficient from a student access and transportation perspective to look at sites closer to that growth and outside the UGA rather than further away within the UGA. It would also be more burdensome and inequitable to displace new residents and housing stock with school facilities where other alternatives exist that require less family displacement, less housing stock demolition, and are more proximate to the students than potential school sites further north.

Therefore, the district anticipates the need to look outside the UGA to locate parcels large enough to accommodate a school, where appropriate. The District is authorized to locate an elementary school outside the UGA. Under Snohomish County's zoning code, elementary schools are allowed in rural areas, although RCW 36.70A.213 imposes certain conditions on extension of public facilities and utilities to serve schools sited in rural areas. RCW 36.70A.213(1)(b) & (c)

### Busing

Due to the impacts, difficulties, and high cost of transporting students over long distances, the district believes busing students long distances from the south end of the district to the north end is not the most appropriate method of addressing all 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 the Kendrick enrollment projections for the district through 2025. Timelines for these projects can be found in Table 9 – *Capital Facilities Plan*.

#### Elementary Schools

District-wide elementary school enrollment is projected to reach 10,301 in 2025 as shown in Table 8, an increase of 485 students from the 2019 enrollment of 9,816. This is 1,696 more students than the existing 2019 elementary school capacity of 8,605. In response to this increase in enrollment, the district is planning:

- 1) Classroom additions at eight schools – 36 classrooms – with a projected capacity of 792 need to be constructed. The location of these additional classrooms (estimated costs): Emerson ES – 6 classrooms (\$5,625,500); Jefferson ES – 4 classrooms (\$3,750,400); Mill Creek ES – 4 classrooms (\$3,750,500); Cedar Wood ES – 4 classrooms (\$3,750,500); Monroe ES – 4 classrooms (\$3,750,500); Silver Firs ES – 4 classrooms (\$3,750,500); View Ridge ES – 8 classrooms (\$4,051,200)\*; Woodside ES – 4 classrooms (\$1,012,800)\*. (\* project completion 2026)  
Total estimate - \$29,442,000
- 2) Additional classroom space as part of three new in lieu of modernization projects – 22 classrooms with - with a projected capacity of 484 need to be constructed. The location of these additional classrooms (estimated costs): Jackson ES – 10 classrooms (\$9,375,000); Madison ES – 4 classrooms (\$3,750,000); Lowell ES – 8 classrooms (\$7,501,000).  
Total estimate - \$20,626,000
- 3) Portable classrooms (26) will need to be relocated or purchased in order to provide enough classroom space at individual schools.

Total estimate - \$4,550,000

The estimated cost of elementary school permanent facility improvements is: \$50,068,000

#### Middle Schools

District-wide middle school enrollment is projected to increase to its highest level of 4,883 in 2025. The existing 2019 middle school capacity of 4,710 will not be adequate to accommodate the projected enrollment. To provide for the enrollment increases at individual schools, portable classrooms (8) will be purchased or relocated to provide sufficient classroom space, while avoiding additional permanent facility construction expense. No other projects adding capacity are planned through 2025. Total estimate - \$1,400,000

The estimated cost of middle school permanent facility improvements is: \$0.

#### High Schools

District-wide high school enrollment is projected to increase to its highest level of 5,916 in 2023. At that point, two of the district's three high schools are projected to be over their permanent building capacity. The plan to address the needs, between 2020 and 2023, is through a modified attendance boundary adjustment and the purchase and placement of portables at the affected schools. As enrollment increases at individual school portable classrooms (7) will need to be purchased or relocated in order to provide enough classroom space. Total estimate - \$1,225,000

The estimated cost of high school permanent facility improvements is: \$0

#### Future School Site Property – 180th Street SE

In 2007 the district purchased property on 180th St. SE as a future site for two schools. As part of the purchase and sale agreement the district issued, to the developer, the equivalent of \$4,660,000 worth of Mitigation Fee Credits toward future impact fees. The developer can use the certificates in lieu of paying impact fees. This practice will continue until the retirement of current credit balance of \$79,750.

#### Property Purchases

To accommodate future growth and the facilities needs of the district, the district plans to acquire additional property in the southeastern portion of the district in the vicinity of Strumme Road for a future elementary school. In accordance with applicable state, regional, and county planning policies, the district finds that this property is an appropriate location for a future elementary school, given the anticipated student enrollment area and growth, and the limited availability of suitable land in south Snohomish County to equitably meet the anticipated student demand.

The cost to purchase these properties is estimated at: \$4,500,000

### **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 2025. Timelines for these projects can be found in Table 9 – *Capital Facilities Plan*.

#### Elementary Schools

- Woodside Elementary School modernization & partial replacement
- Jackson Elementary School new in lieu of modernization
- Madison Elementary School new in lieu of modernization
- Lowell Elementary School new in lieu of modernization

The cost of these improvements is estimated at: \$161,079,000

#### Middle Schools

- North Middle School modernization & partial replacement

The cost to complete this improvement is estimated at: \$6,600,000

#### High Schools

- Everett High School Main Building exterior finish preservation and restoration
- Cascade High School Science Building modernization
- Everett High School Auditorium Building modernization
- Everett High School Vocational Building modernization
- Jackson High School Science Classroom upgrades
- cascade High School Cafeteria and kitchen upgrades
- Everett High School Science Building - interior and exterior finishes
- Cascade High School Softball field and dugout renovations

The cost of these improvements is estimated at: \$73,561,000

#### Safety and Security Projects

- Upgrades to building access and controls, fire alarms, site security, and parking lot expansions

The cost of these improvements is estimated at: \$7,244,000

#### 1:1 Computers for Students – High School, Middle School, & Elementary School

- WI-FI mobile devices, related infrastructure, support, training, professional development

The cost of these improvements is estimated at: \$9,400,000

#### Technology Infrastructure & Upgrades

- WIFI, security cameras, network/data security, data center systems
- Upgrade electrical systems district-wide - Including data server rooms emergency backup generators and fiber optic network systems
- Modernize Student Information System - including software and staff development

The cost of these improvements is estimated at: \$27,410,000

#### Other School Projects

- District-wide upgrades to heating, ventilation and air conditioning systems, exterior and interior finishes, roofing, and other miscellaneous systems upgrades.

The cost of these improvements is estimated at: \$22,620,000

#### Other Projects

- Replace playground equipment
- Memorial stadium - replace synthetic track and turf
- South satellite bus facility

The cost of these improvements is estimated at: \$6,133,000

## Facilities Needs 2025-2035

### Planned Improvements

In order to house the district wide projected enrollments (OFM) from 2025 through 2035, the district would need to construct new schools and/or classroom additions at various school sites throughout the district. To prepare for this and future growth the district will need to acquire additional sites for new schools.

To accommodate the enrollment from 2025-2035 the district anticipates the need for the following facilities:

- Elementary school level
  - 124 Classrooms / 2,727 capacity
    - *Equivalent to four new schools and additions to existing schools*
- Middle school level
  - 52 Classrooms / 1,248 capacity
    - *Equivalent to approximately one new school and additions to existing schools*
- High school level
  - The construction and opening of a high school (1,500 capacity) will accommodate all projected growth through 2035.

**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>
	2020	2021	2022	2023	2024				
<b>Improvements Adding Student Capacity</b>									
<b>Elementary School</b>									
Tambark Creek Elementary	\$0.674					\$0.674			\$29.442
Classroom Additions - 36 CR at eight (8) schools	\$0.400	\$4.663	\$5.063	\$4.050	\$7.689	\$29.442			\$9.375
Jackson ES - Part of new in lieu of modernization project - 10 CR	\$0.100	\$1.587	\$3.938	\$3.750		\$9.375			\$3.750
Madison ES - Part of new in lieu of modernization project - 4 CR	\$0.075	\$0.601	\$1.574	\$1.500		\$7.501			\$7.501
Lowell ES - Part of new in lieu of modernization project - 8 CR	\$1.225	\$0.525	\$0.525	\$0.875	\$1.050	\$4.550	\$1.000	\$1.000	\$2.550
<b>Middle School</b>									
Portable Relocations / Purchase <sup>4</sup>	\$0.350		\$0.175		\$0.525	\$1.400		\$0.250	\$1.150
<b>High School</b>									
Portable Relocations / Purchase <sup>4</sup>	\$0.175	\$0.175	\$0.175	\$0.350	\$0.175	\$1.225	\$1.000	\$0.225	
<b>Subtotal</b>	<b>\$2.999</b>	<b>\$7.551</b>	<b>\$11.675</b>	<b>\$11.650</b>	<b>\$12.589</b>	<b>\$57.917</b>	<b>\$2.674</b>	<b>\$1.475</b>	<b>\$53.768</b>
<b>Property Adding Student Capacity</b>									
180th Street SE Site <sup>4</sup>	0.080					\$0.080		0.080	
Purchase property for future elementary school	\$1.984	\$2.516				\$4.500	\$4.500		
<b>Subtotal</b>	<b>\$2.064</b>	<b>\$2.516</b>				<b>\$4.580</b>	<b>\$4.500</b>	<b>\$0.080</b>	
<b>Improvements Not Adding Student Capacity</b>									
Woodside ES modernization + partial replacement	\$15.930	\$0.600				\$16.530	\$16.530		
North MS modernization + partial replacement	\$6.600					\$6.600	\$6.600		
Everett HS - Main building exterior finish preserve & restore	\$0.875					\$0.875	\$0.875		\$36.918
Jackson ES - New in lieu of modernization project	\$0.350	\$5.588	\$15.505	\$14.767	\$0.708	\$55.492			\$55.492
Madison ES - New in lieu of modernization project	\$0.400	\$8.324	\$23.307	\$22.197	\$1.264	\$52.139			\$17.770
Lowell ES - New in lieu of modernization project		\$1.564	\$7.821	\$7.641	\$20.856	\$27.583			\$10.232
Cascade HS - Science building modernization		\$2.666	\$7.463	\$11.861	\$2.693	\$27.583			\$2.973
Everett HS - Auditorium building modernization		\$4.137	\$11.585		\$7.539	\$10.232			\$5.744
Everett HS - Vocational building modernization					\$0.595	\$2.973			\$6.735
HM Jackson HS - Science classroom upgrade				\$0.862	\$2.872	\$5.744			\$5.744
Cascade HS - Cafeteria/kitchen upgrade				\$1.347	\$3.368	\$6.735			\$6.735
Everett HS - Science building - interior/exterior finishes		\$2.130	\$2.562	\$0.777	\$0.275	\$7.244	\$1.500		\$5.744
Safety and security upgrades	\$4.000	\$5.400				\$9.400	\$9.400		\$2.093
1:1 Computers for students		\$0.524	\$0.523	\$0.523	\$0.523	\$2.093			\$2.440
Replace playground equipment - 8 schools			\$2.440			\$2.440			\$1.649
Memorial stadium - replace synthetic turf and track			\$1.649			\$1.649			\$1.600
Cascade HS - Renovate softball fields and dugouts					\$0.800	\$0.800			\$22.620
South satellite bus facility					\$1.593	\$4.713			\$17.907
Upgrade HVAC/roofing/floor systems	\$3.069	\$7.220	\$6.131	\$4.607	\$1.593	\$22.620	\$4.713		\$8.892
District-wide technology infrastructure & upgrades	\$6.668	\$10.666	\$6.270	\$2.008	\$0.935	\$27.410	\$18.518		
<b>Subtotal</b>	<b>\$39.392</b>	<b>\$40.452</b>	<b>\$66.754</b>	<b>\$73.957</b>	<b>\$57.026</b>	<b>\$314.047</b>	<b>\$58.136</b>		<b>\$255.911</b>
<b>Total</b>	<b>\$44.455</b>	<b>\$50.519</b>	<b>\$78.429</b>	<b>\$85.607</b>	<b>\$47.919</b>	<b>\$376.544</b>	<b>\$65.310</b>	<b>\$1.555</b>	<b>\$309.679</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 funding assistance from prior construction projects, and impact/mitigation fee credits from the 2007 purchase of the 30-acre property on 180th Street SE
3. Unsecured future - school mitigation and impact fees not yet collected, bonds and levies not yet approved, grants, donations, and other miscellaneous sources
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 2020 through 2025. The financing components include: 1) secured funding from capital projects bonds and levies; 2) secured funding from other sources - property sales, school mitigation and impact fees, state funding assistance from prior construction projects, and mitigation fee credits from the 2007 purchase of the 30-acre property on 180th St SE; and 3) unsecured future funding sources - school mitigation and impact fees not yet collected, bonds and levies not yet approved. The financing plan also separates projects and portions of projects which add permanent building capacity from those which do not.

### **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 sold and 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. Many major projects have been financed by these bonds. Most recently, in April 2016, the voters of the district approved a \$149.7 million capital bond.

#### Capital Levies

In April 2016, the voters of the district passed a \$89.6 million levy replacement Capital Levy for Safety, Building, and Instructional Technology Improvements. Prior to that, voters in the Everett School District passed a Building Repair and Technology levy in 2010 authorizing the district to collect \$48 million from property taxes over six years, through 2016, for capital improvements to facilities and technology.

#### School Construction Assistance Program (SCAP)

State funding assistance comes from the Common School Construction Fund (28A.515 RCW). 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 funding assistance for a specific capital project. To qualify, a project must first meet a state-established criterion of need. This is determined through a formula which 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 2019 state funding assistance percentages, for recognized project costs, range from a minimum of 20% to a maximum of 96.35%. The district's current state funding assistance percentage is: 52.69%.

State funding assistance can be applied only to major school construction projects. Site acquisition and minor improvements are not eligible to receive funding assistance from the state. Because availability of state funding assistance has not kept pace with the rapid enrollment growth occurring in many of Washington's school districts, sometimes funding assistance from the state is not 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. Sometimes borrowing funds allocated to future projects, until the state distributes their funding assistance. When the state funding assistance is received, the future projects' accounts are reimbursed.

Currently, the state has determined that the Everett School District has excess student capacity, and, therefore, is not currently eligible for state funding assistance on projects that provide increased student capacity. The district remains eligible for state funding assistance for modernization projects.

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, 2019, the CCA been adjusted to \$238.22 per square foot.

#### School Impact Fees

Impact fees, assessed on new development, have been adopted by several jurisdictions as a means of supplementing traditional funding sources for the construction of public facilities needed to accommodate the population growth attributed to the new development. School impact fees are generally collected by the permitting agency at the time issuance of building permits or, in a limited number of instances, the issuance of certificates of occupancy. The district's impact fees are calculated on worksheets contained in Appendix A and are summarized in Table 11.

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 portables. Credits have also been applied in the formula to account for state funding assistance 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 only address existing deficiencies have been eliminated from the variables used in the calculations as indicated in Table 12 – *Impact Fee Variables*.

#### **Calculation Criteria / Impact Fee Variables (See Table 12 – *Impact Fee Variables*)**

Student Factor: The student factor or Student Generation Rate (SGR) is the average number of students generated by each housing type, whether single-family detached dwellings or multiple-family dwellings. Multiple-family dwellings in a single structure, are broken out into zero-to-one bedroom units and two or more bedroom units.

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

The current student generation rates for the district are:

**Table 10  
Student Generation Rates**

Housing Type	K-5	6-8	9-12	K-12
Single Family	0.365	0.097	0.076	0.538
Multiple Family, 0-1 BR	.000	.000	.000	0.000
Multiple Family, 2+ BR*	0.191	0.090	0.079	0.360

\* Includes duplexes, condominiums, and townhouses

Note: Due to rounding, calculated K-12 Student Generation Rate totals may not equal the sum of individual grade rates

**Impact Fee Schedule**

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

Housing Type	Impact Fee Per Unit
Single Family	\$10,716
Multiple Family, 0-1 BR	\$0
Multiple Family, 2+ BR*	\$6,020

**School Impact Fees with 50% discount  
Everett School District**

Housing Type	Impact Fee Per Unit
Single Family	\$5,358
Multiple Family, 0-1 BR	\$0
Multiple Family, 2+ BR*	\$3,010

\* Includes duplexes, condominiums, and townhomes



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

Criteria	Elementary	Middle	High
<b>Site Acquisition Cost Element</b>			
Site Size (acres)	21.00	0	0
<i>Growth Related (2020-25)</i>			
Average Land Cost Per Acre	\$214,286	\$214,286	\$214,286
<i>Growth Related (2020-25)</i>	\$61,286	\$0	\$0
Total Land Cost	\$4,500,000	\$0	\$0
<i>Growth Related (2020-25)</i>	\$1,287,000	\$0	\$0
Additional Land Capacity	600	0	0
<i>Growth Related (2020-25)</i>	172	0	0
Student Factor			
Single Family	0.365	0.097	0.076
Multiple Family 0-1 Bedroom	.000	.000	.000
Multiple Family 2+ Bedrooms	0.191	0.090	0.079
<b>School Construction Cost Element</b>			
	<b>Fifty-eight (58) Additional Classrooms</b>		
Additional Building Capacity	968	0	0
<i>Growth Related (2020-25)</i>	277	0	0
Current Facility Square Footage	1,084,139	552,780	838,854
Estimated Facility Construction Cost	\$50,068,000	\$0	\$0
<i>Growth Related (2020-25)</i>	\$14,319,448	\$0	\$0
<b>State Financing Assistance Credit *</b>			
Construction Cost Allotment -- July 2019	\$238.22	\$238.22	\$238.22
School Space per Student (OSPI)	90	117	130
State Financing Assistance Percentage	52.69%	52.69%	52.69%
<b>Tax Payment Credit</b>			
Interest Rate	2.44%	2.44%	2.44%
Loan Payoff (Years)	10	10	10
Levy Rate	0.002414	0.002414	0.002414
Average Assessed Value	\$473,216 (Single Family)	\$160,556 (MF 0-1 bdrm)	\$228,123 (MF 2+ bdrm)
<b>Growth-Related Capacity Need</b>			
Permanent Facilities	28.60%	10.98%	0.00%
<b>Discount</b>	50%	50%	50%

\* The district is currently not eligible for state funding assistance on new construction.

***Appendix A***

***Impact Fee Calculations***

IMPACT FEE WORKSHEET  
 EVERETT SCHOOL DISTRICT  
**SINGLE-FAMILY RESIDENTIAL**

**SITE ACQUISITION COST**

acres needed	<u>21.00</u>	x	cost per acre	<u>\$61,286</u>	/	capacity (# students)	<u>172</u>	x	student factor	<u>0.365</u>	=	<u>\$2,731</u>	(elementary)
acres needed	<u>0.00</u>	x	cost per acre	<u>\$0</u>	/	capacity (# students)	<u>0</u>	x	student factor	<u>0.097</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>0.076</u>	=	<u>\$0</u>	(high school)
TOTAL SITE ACQUISITION COST											=	<u>\$2,731</u>	

**SCHOOL CONSTRUCTION COST**

total const. cost	<u>\$14,319,448</u>	/	capacity (# students)	<u>277</u>	x	student factor	<u>0.365</u>	=	<u>\$18,869</u>	(elementary)			
total const. cost	<u>\$0</u>	/	capacity (# students)	<u>0</u>	x	student factor	<u>0.097</u>	=	<u>\$0</u>	(middle school)			
total const. cost	<u>\$0</u>	/	capacity (# students)	<u>0</u>	x	student factor	<u>0.076</u>	=	<u>\$0</u>	(high school)			
									Subtotal	<u>\$18,869</u>			
Total Square Feet of Permanent Space (District)	<u>2,475,773</u>	/	Total Square Feet of School Facilities	<u>2,593,253</u>	=	<u>95.47%</u>							
TOTAL FACILITY CONSTRUCTION COST											=	<u>\$18,014</u>	

**STATE FINANCING ASSISTANCE CREDIT**

Const. Cost Allocation	<u>\$238.22</u>	x	OSPI Allowance	<u>90</u>	x	State Financing Assistance %	<u>0.00%</u>	x	student factor	<u>0.365</u>	=	<u>\$0</u>	(elementary)
Const. Cost Allocation	<u>\$238.22</u>	x	OSPI Allowance	<u>108</u>	x	State Financing Assistance %	<u>0.00%</u>	x	student factor	<u>0.097</u>	=	<u>\$0</u>	(middle school)
Const. Cost Allocation	<u>\$238.22</u>	x	OSPI Allowance	<u>130</u>	x	State Financing Assistance %	<u>0.00%</u>	x	student factor	<u>0.076</u>	=	<u>\$0</u>	(high school)
TOTAL STATE MATCH CREDIT											=	<u>\$0</u>	

**TAX PAYMENT CREDIT**

assessed value	<u>\$473,216</u>	$\frac{[(1 + \text{interest rate } 2.44\%)^{10} - 1] \times [\text{interest rate } 2.44\% \times 0.002414 \text{ Property tax levy rate}]}{(1 + \text{interest rate } 2.44\%)^{10} - 1}$										=	<u>\$10,029</u>	(tax payment credit)
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**IMPACT FEE CALCULATION**

SITE ACQUISITION COST	<u>\$2,731</u>
FACILITY CONSTRUCTION COST	<u>\$18,014</u>
RELOCATABLE FACILITIES COST (PORTABLES)	<u>\$0</u>
(LESS STATE FINANCING ASSISTANCE CREDIT)	<u>\$0</u>
(LESS TAX PAYMENT CREDIT)	<u>(\$10,029)</u>
(LESS COUNTY DISCOUNT)	<u>(\$5,358)</u>
(LESS ELECTIVE DISTRICT DISCOUNT)	<u>\$0</u>

<b>FINAL IMPACT FEE PER UNIT</b>	<b><u>\$5,358</u></b>
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IMPACT FEE WORKSHEET  
 EVERETT SCHOOL DISTRICT  
**MULTIPLE FAMILY RESIDENTIAL -- 1 BEDROOM OR LESS**

**SITE ACQUISITION COST**

acres needed	<u>21.00</u>	x	cost per acre	<u>\$61,286</u>	/	capacity (# students)	<u>172</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>\$14,319,448</u>	/	capacity (# students)	<u>277</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 Permanent Space (District)	<u>2,475,773</u>	/	Total Square Feet of School Facilities	<u>2,593,253</u>				=	<u>95.47%</u>				
TOTAL FACILITY CONSTRUCTION COST											=	<u>\$0</u>	

**STATE FINANCING ASSISTANCE CREDIT**

Const. Cost Allocation	<u>\$238.22</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)
Const. Cost Allocation	<u>\$238.22</u>	x	OSPI Allowance	<u>108</u>	x	State Financing Assistance %	<u>0.00%</u>	x	student factor	<u>.000</u>	=	<u>\$0</u>	(middle school)
Const. Cost Allocation	<u>\$238.22</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**

assessed value	<u>\$160,556</u>												
$\frac{[(1 + \text{interest rate } 2.44\%)^{10} - 1] \times \text{assessed value}}{(1 + \text{interest rate } 2.44\%)^{10} - 1} \times 0.002414 \text{ Property tax levy rate} = \text{tax payment credit}$													
											=	<u>\$3,403</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>(\$3,403)</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>21.00</u>	x	cost per acre	<u>\$61,286</u>	/	capacity (# students)	<u>172</u>	x	student factor	<u>0.191</u>	=	<u>\$1,429</u>	(elementary)
acres needed	<u>0.00</u>	x	cost per acre	<u>\$0</u>	/	capacity (# students)	<u>0</u>	x	student factor	<u>0.090</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>0.079</u>	=	<u>\$0</u>	(high school)
TOTAL SITE ACQUISITION COST											=	<u>\$1,429</u>	

**SCHOOL CONSTRUCTION COST**

total const. cost	<u>\$14,319,448</u>	/	capacity (# students)	<u>277</u>	x	student factor	<u>0.191</u>	=	<u>\$9,874</u>	(elementary)			
total const. cost	<u>\$0</u>	/	capacity (# students)	<u>0</u>	x	student factor	<u>0.090</u>	=	<u>\$0</u>	(middle school)			
total const. cost	<u>\$0</u>	/	capacity (# students)	<u>0</u>	x	student factor	<u>0.079</u>	=	<u>\$0</u>	(high school)			
									Subtotal	<u>\$9,874</u>			
Total Square Feet of Permanent Space (District)	<u>2,475,773</u>	/	Total Square Feet of School Facilities	<u>2,593,253</u>				=	<u>95.47%</u>				
TOTAL FACILITY CONSTRUCTION COST											=	<u>\$9,426</u>	

**STATE FINANCING ASSISTANCE CREDIT**

Const. Cost Allocation	<u>\$238.22</u>	x	OSPI Allowance	<u>90</u>	x	State Financing Assistance %	<u>0.00%</u>	x	student factor	<u>0.191</u>	=	<u>\$0</u>	(elementary)
Const. Cost Allocation	<u>\$238.22</u>	x	OSPI Allowance	<u>108</u>	x	State Financing Assistance %	<u>0.00%</u>	x	student factor	<u>0.090</u>	=	<u>\$0</u>	(middle school)
Const. Cost Allocation	<u>\$238.22</u>	x	OSPI Allowance	<u>130</u>	x	State Financing Assistance %	<u>0.00%</u>	x	student factor	<u>0.079</u>	=	<u>\$0</u>	(high school)
TOTAL STATE MATCH CREDIT											=	<u>\$0</u>	

**TAX PAYMENT CREDIT**

assessed value	<u>\$228,123</u>												
$\left[ \frac{((1 + \text{interest rate } 2.44\%)^{10} - 1)}{\text{interest rate } 2.44\%} \times 0.002414 \text{ Property tax levy rate} \right] \times \text{assessed value}$													
											=	<u>\$4,835</u>	(tax payment credit)

**IMPACT FEE CALCULATION**

SITE ACQUISITION COST	<u>\$1,429</u>
FACILITY CONSTRUCTION COST	<u>\$9,426</u>
RELOCATABLE FACILITIES COST (PORTABLES)	<u>\$0</u>
(LESS STATE FINANCING ASSISTANCE CREDIT)	<u>\$0</u>
(LESS TAX PAYMENT CREDIT)	<u>(\$4,835)</u>
(LESS COUNTY DISCOUNT)	<u>(\$3,010)</u>
(LESS ELECTIVE DISTRICT DISCOUNT)	<u>\$0</u>

<b>FINAL IMPACT FEE PER UNIT</b>	<u><b>\$3,010</b></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

4/3/2020

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 2012 through December 2018. 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 March 2020. 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 2,331 single family detached units were compared with data on 20,504 students registered in the District, and the following matches were found by grade level(s)\*:

GRADE(S)	COUNT OF MATCHES	CALCULATED RATE
K	168	0.072
1	168	0.072
2	166	0.071
3	142	0.061
4	108	0.046
5	99	0.042
6	91	0.039
7	74	0.032
8	62	0.027
9	55	0.024
10	49	0.021
11	40	0.017
12	33	0.014
<b>K-5</b>	<b>851</b>	<b>0.365</b>
<b>6-8</b>	<b>227</b>	<b>0.097</b>
<b>9-12</b>	<b>177</b>	<b>0.076</b>
<b>K-12</b>	<b>1255</b>	<b>0.538</b>

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 1,792 multi-family 2+ BR units were compared with data on 20,504 students registered in the District, and the following matches were found by grade level(s)\*:

<b>GRADE(S)</b>	<b>COUNT OF MATCHES</b>	<b>CALCULATED RATE</b>
<b>K</b>	66	0.037
<b>1</b>	56	0.031
<b>2</b>	56	0.031
<b>3</b>	51	0.028
<b>4</b>	52	0.029
<b>5</b>	61	0.034
<b>6</b>	52	0.029
<b>7</b>	57	0.032
<b>8</b>	53	0.030
<b>9</b>	30	0.017
<b>10</b>	40	0.022
<b>11</b>	44	0.025
<b>12</b>	27	0.015
<b>K-5</b>	342	0.191
<b>6-8</b>	162	0.090
<b>9-12</b>	141	0.079
<b>K-12</b>	645	0.360

6. **Multi-Family 0-1 BR Rates:** Research indicated that 379 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 20,504 students registered in the District. No specific unit number matches were made.

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

	<b>K-5</b>	<b>6-8</b>	<b>9-12</b>	<b>K-12</b>
<b>Single Family</b>	.365	.097	.076	.538
<b>Multi-Family 2+ BR</b>	.191	.090	.079	.360

\*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 PROJECTED STUDENT ENROLLMENT 2019-2025**

School Type	Grade Level	School Year & Grade Progression Percentage												AVG GP%
		2020	GP%	2021	GP%	2022	GP%	2023	GP%	2024	GP%	2025	GP%	
Elementary	K	1,683	--	1,713	--	1,742	--	1,771	--	1,801	--	1,830	--	--
	1	1,669	102.8%	1,730	102.8%	1,761	102.8%	1,791	102.8%	1,820	102.8%	1,851	102.8%	102.8%
	2	1,705	101.0%	1,686	101.0%	1,747	101.0%	1,778	101.0%	1,809	101.0%	1,838	101.0%	101.0%
	3	1,666	101.2%	1,726	101.2%	1,706	101.2%	1,768	101.2%	1,800	101.2%	1,831	101.2%	101.2%
	4	1,646	100.5%	1,674	100.5%	1,734	100.5%	1,714	100.5%	1,776	100.5%	1,808	100.4%	100.5%
Middle	5	1,571	100.3%	1,650	100.2%	1,679	100.3%	1,739	100.3%	1,719	100.3%	1,781	100.3%	100.3%
	6	1,650	99.8%	1,568	99.8%	1,647	99.8%	1,676	99.8%	1,736	99.8%	1,716	99.8%	99.8%
	7	1,705	99.4%	1,640	99.4%	1,559	99.4%	1,637	99.4%	1,666	99.4%	1,726	99.4%	99.4%
	8	1,569	100.3%	1,710	100.3%	1,645	100.3%	1,564	100.3%	1,642	100.3%	1,671	100.3%	100.3%
High	9	1,588	100.2%	1,572	100.2%	1,713	100.2%	1,648	100.2%	1,567	100.2%	1,645	100.2%	100.2%
	10	1,434	98.6%	1,565	98.6%	1,549	98.5%	1,688	98.5%	1,624	98.5%	1,544	98.5%	98.5%
	11	1,401	92.8%	1,331	92.8%	1,452	92.8%	1,438	92.8%	1,567	92.8%	1,507	92.8%	92.8%
	12	1,283	99.4%	1,393	99.4%	1,323	99.4%	1,443	99.4%	1,430	99.4%	1,558	99.4%	99.4%
			Growth%		Growth%		Growth%		Growth%		Growth%		Growth%	
Elementary		9,940	101.3%	10,179	102.4%	10,369	101.9%	10,561	101.9%	10,725	101.6%	10,939	102.0%	101.8%
	Middle	4,924	101.2%	4,918	99.9%	4,851	98.6%	4,877	100.5%	5,044	103.4%	5,113	101.4%	100.8%
	High	5,706	104.4%	5,861	102.7%	6,037	103.0%	6,217	103.0%	6,188	99.5%	6,254	101.1%	102.3%
	<b>TOTAL</b>	<b>20,570</b>	<b>102.1%</b>	<b>20,958</b>	<b>101.9%</b>	<b>21,257</b>	<b>101.4%</b>	<b>21,655</b>	<b>101.9%</b>	<b>21,957</b>	<b>101.4%</b>	<b>22,306</b>	<b>101.6%</b>	<b>101.7%</b>

Source: OSPI Report 1049

Note: All projected enrollments shown are Full Time Equivalents (FTE).

ACTUAL STUDENT ENROLLMENT 2009-2019

School Type	Grade Level	School Year & Growth Progression Percentage												
		2009	2010	2011	2012	2013	2014	2015	2016	2017	2018	2019	GP%	AVG GP%
Elementary	K	1,566	1,468	1,566	1,492	1,592	1,545	1,464	1,571	1,623	1,657	1,624	--	--
	1	1,549	1,595	1,549	1,547	1,569	1,678	1,622	1,519	1,596	1,652	1,688	101.8%	103.1%
	2	1,425	1,502	1,425	1,472	1,517	1,605	1,693	1,666	1,524	1,619	1,646	101.4%	98.6%
	3	1,500	1,403	1,500	1,550	1,461	1,530	1,636	1,699	1,682	1,549	1,638	101.6%	101.3%
	4	1,445	1,427	1,445	1,437	1,528	1,499	1,585	1,616	1,691	1,671	1,567	99.3%	99.7%
Middle	5	1,481	1,425	1,481	1,341	1,419	1,546	1,512	1,589	1,620	1,710	1,653	101.1%	99.8%
	6	1,425	1,499	1,425	1,429	1,341	1,400	1,570	1,486	1,598	1,593	1,715	98.3%	99.6%
	7	1,380	1,408	1,380	1,406	1,454	1,366	1,380	1,566	1,504	1,587	1,564	99.3%	99.1%
	8	1,426	1,379	1,426	1,437	1,406	1,449	1,372	1,424	1,557	1,485	1,585	98.7%	100.6%
	9	1,389	1,432	1,389	1,440	1,441	1,438	1,481	1,375	1,425	1,565	1,455	100.5%	100.6%
High	10	1,438	1,365	1,438	1,361	1,422	1,414	1,422	1,479	1,366	1,398	1,510	98.1%	98.4%
	11	1,384	1,365	1,384	1,306	1,275	1,346	1,318	1,359	1,328	1,273	1,291	93.2%	93.9%
	12	1,421	1,444	1,421	1,372	1,357	1,343	1,398	1,351	1,340	1,292	1,207	97.3%	99.9%
	TOTAL:	18,829	18,712	18,829	18,590	18,782	19,159	19,453	19,700	19,854	20,051	20,143	101.0%	100.7%
Elementary		8,966	8,820	8,966	8,839	9,086	9,403	9,512	9,660	9,736	9,858	9,816	101.3%	101.0%
Middle School		4,231	4,286	4,231	4,272	4,201	4,215	4,322	4,476	4,659	4,665	4,864	100.1%	101.4%
High School		5,632	5,606	5,632	5,479	5,495	5,541	5,619	5,564	5,459	5,528	5,463	101.3%	99.5%

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**

## Enrollment Forecasts OSPI and OFM Ratio Methods

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. Enrollment forecasts using this method are then compared with the six-year forecast (2025) prepared by the State Office of the Superintendent of Public Instructions (OSPI), with one being adopted as official forecast for the Capital Facilities Plan. OSPI does not forecast enrollments for Year 2035, so the Ratio Method is used for that purpose.

### Ratio Method

<b>Table D-1</b>			
<b>Historical Student/Population Ratio</b>			
<b>Year</b>	<b>Population*</b>	<b>FTE Student Enrollment</b>	<b>Ratio</b>
2006	122,733	18,538	15.10%
2007	124,578	18,573	14.91%
2008	126,150	18,743	14.86%
2009	127,730	18,828	14.74%
2010	129,842	18,660	14.37%
2011	130,441	18,613	14.27%
2012	131,111	18,590	14.18%
2013	132,833	18,272	13.76%
2014	135,654	19,159	14.15%
2015	138,715	19,453	14.02%
2016	142,060	19,700	13.87%
2017	145,052	19,854	13.69%
<b>2018 CFP Estimate</b>			
2018	147,361	20,183	13.70%
2019	150,119	20,493	13.65%
<b>2018-19 Actual Enrollment</b>			
2018	148,092	20,051	13.54%
2019	149,372	20,143	13.49%

Population: Official County Estimate.  
Enrollment: District Estimate

Table D-1 shows population estimates developed by Snohomish County over the past 12 years (2010 is the official census figure). Estimates have remained relatively constant for the past thirteen years. The 2035 population estimate (194,259) has been accepted by Everett, the County and Snohomish County Tomorrow (SCT) and is accepted by the District. It remains unchanged from the 2018 CFP.

Student enrollment totals were published by OSPI in late 2019. The ratio of student population to total population between 2006-2019 is shown at left. The 2018-2019 estimates from the 2018 CFP are also shown. The “2018-19 Actual Enrollment” are then shown for comparison purposes. Actual enrollments in 2018 and 2019 were less than that predicted in the 2018 CFP. This reflects a belief that household sizes are declining. This has been a continuous trend since 2006.

For its planning purposes, the District has accepted the County’s estimated population for 2035. The District further accepts the Kendrick enrollment projections through 2025. Finally, the District assumes that the student population ratio will decline to 13.00% in 2035. In summary, the following OFM-based FTE enrollment figures are accepted for use in the 2018 CFP.

<b>Actual</b>				<b>Estimated</b>							
<b>2016</b>	<b>2017</b>	<b>2018</b>	<b>2019</b>	<b>2020</b>	<b>2021</b>	<b>2022</b>	<b>2023</b>	<b>2024</b>	<b>2025</b>	<b>2035</b>	
<b>Population</b>											
142,060	145,052	148,092	149,372	152,177	152,177	154,983	157,788	160,593	166,204	194,259	
<b>Ratio</b>											
13.87%	13.69%	13.54%	13.49%	13.65%	13.64%	13.54%	13.48%	13.67%	13.42%	13.00%	
<b>Enrollment</b>											
19,700	19,854	20,051	20,143	20,570	20,958	21,257	21,655	21,957	22,306	25,254	

***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 Projects  
2020-25**

**Enrollment Projections by Grade**

Grade Level	Actual 2019	Projections					
		2020	2021	2022	2023	2024	2025
<b>K</b>	1,629	1,675	1,719	1,718	1,688	1,703	1,708
<b>1</b>	1,689	1,650	1,693	1,738	1,736	1,709	1,716
<b>2</b>	1,649	1,681	1,646	1,689	1,733	1,731	1,705
<b>3</b>	1,641	1,661	1,693	1,658	1,702	1,746	1,744
<b>4</b>	1,568	1,634	1,656	1,688	1,653	1,697	1,741
<b>5</b>	1,655	1,557	1,624	1,646	1,678	1,643	1,687
<b>6</b>	1,715	1,639	1,539	1,605	1,635	1,667	1,632
<b>7</b>	1,565	1,695	1,614	1,515	1,586	1,616	1,648
<b>8</b>	1,585	1,548	1,671	1,591	1,503	1,573	1,603
<b>9</b>	1,456	1,567	1,527	1,654	1,578	1,498	1,568
<b>10</b>	1,511	1,417	1,525	1,489	1,613	1,539	1,464
<b>11</b>	1,294	1,392	1,307	1,406	1,373	1,489	1,422
<b>12</b>	1,213	1,238	1,337	1,256	1,352	1,322	1,438
<b>Total</b>	<b>20,170</b>	<b>20,354</b>	<b>20,551</b>	<b>20,653</b>	<b>20,830</b>	<b>20,933</b>	<b>21,076</b>

**Enrollment Projections by Level**

<b>K-5</b>	9,831	9,858	10,031	10,137	10,190	10,229	10,301
<b>6-8</b>	4,865	4,882	4,824	4,711	4,724	4,856	4,883
<b>9-12</b>	5,474	5,614	5,696	5,805	5,916	5,848	5,892

***Appendix F***

***Levels of Service Report***

**2019-20**

**Levels of Service Report**

*(October 2019 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 2019-20 school year are shown below.

**Average Class Size**

	<b>Elementary</b>
<b>Kindergarten</b>	<b>20.0</b>
<b>Grades 1 - 3</b>	<b>21.4</b>
<b>Grades 4 - 5</b>	<b>24.9</b>
	<b>Middle School</b>
<b>Grades 6 - 8</b>	<b>24.1</b>
	<b>High School</b>
<b>Grades 9 - 12</b>	<b>22.8</b>

***Appendix G***

***Impact Fee Report***

**2018 & 2019  
School Impact fee Report**

Impact fees are collected on housing developments within unincorporated Snohomish County. These figures do not include any fees collected for the cities of Everett and Mill Creek. The revenues represent the total amount the district received from developers. The expenditures show the amounts spent by the district at specific schools.

The mitigation fee credit shows the value of the Mitigation Fee Certificates used by developers. The charts show 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.

**2018**

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

Revenue:	<b>\$ 356,422.00</b>	
Expenditures:	<b>\$ 142,310.57</b>	<u>Sites</u>
	\$ 33,156.58	Emerson Elementary School
	\$ 30,187.80	Lowell Elementary School
	\$ 13,350.17	Monroe Elementary School
	\$ 4,503.85	Silver Lake Elementary School
	\$ 21,252.36	View Ridge Elementary School
	\$ 10,912.04	Whittier Elementary School
	\$ 28,947.77	Eisenhower Middle School

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

2018 Beginning Balance:	<b>\$ 800,057.52</b>
Mitigation Fee Certificates:	<b>\$ 216,427.50</b>
2018 Ending Balance:	<b>\$ 583,630.02</b>

**2019**

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

Revenue:	<b>\$ 1,259,601.00</b>	
Expenditures:	<b>\$ 622,168.43</b>	<u>Sites</u>
	\$ 164,349.80	Jefferson Elementary School
	\$ 64,484.68	Silver Firs Elementary School
	\$ 174,133.90	Silver Lake Elementary School
	\$ 1,387.50	Tambark Creek Elementary School
	\$ 196,883.42	Gateway Middle School
	\$ 20,929.13	Cascade High School

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

2019 Beginning Balance:	<b>\$ 583,630.02</b>
Mitigation Fee Certificates:	<b>\$ 503,880.00</b>
2019 Ending Balance:	<b>\$ 79,750.02</b>

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 2007, 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.



2020 – 2025 CAPITAL FACILITIES PLAN  
LAKE STEVENS SCHOOL DISTRICT NO. 4

*prepared for:*

Snohomish County

*And*

City of Lake Stevens  
City of Marysville

August 2020



# **CAPITAL FACILITIES PLAN**

## **LAKE STEVENS SCHOOL DISTRICT NO. 4**

### **BOARD OF DIRECTORS**

Mari Taylor, President  
John Boerger, Vice President  
David Iseminger  
Paul Lund  
Kevin Plemel

### **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 Robb Stanton at the District (425) 335-1500

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Appendix D: Student Generation Rates -- Doyle Consulting
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Appendix G: Snohomish County General Policy Plan -- Appendix F

## 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 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 seventeen years (2035), with a more detailed schedule and financing program for capital improvements over the next six years (2020-2025). This CFP is based in large measure on the 2015 Facilities Master Plan for the Lake Stevens School District.

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<sup>1</sup>. 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 2018.

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

<b>Element</b>	<b>See Page</b>	<b>/</b>	<b>Table</b>
Future enrollment forecasts for each grade span (elementary, middle, mid-high and high).	5-2		5-2
An inventory of existing capital facilities owned by the District, showing the locations and student capacities of the facilities.	4-2		4-1
A forecast of the future needs for capital facilities and school sites; distinguishing between existing and projected deficiencies.	6-1 6-2		6-1 6-2
The proposed capacities of expanded or new capital facilities.	6-3		6-3
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.	6-3		6-3

Element	See Page / Table	
A calculation of impact fees to be assessed and support data substantiating said fees.	Appendix A	
A report on fees collected through April 2020 and how those funds were used.	6-5	6-4

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<sup>1</sup> See Appendix F of this CFP

In developing this CFP, the guidelines of Appendix F of the General Policy Plan<sup>1</sup> 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 by Doyle Consulting (See Appendix C).
- 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 if 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 of Marysville and Lake Stevens constitutes approval of the methodology used herein by those entities.

**Overview of the Lake Stevens School District**

The Lake Stevens School District is located six miles east of downtown Everett and encompasses most 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 9,200<sup>2</sup> with seven 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. The District employs 589 certificated staff members and 630 classified staff for a total of 1,219.

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<sup>1</sup> See Appendix G of this CFP

<sup>2</sup> October 2019 OSPI 1049 Report

### ***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:

- Continued housing growth in the District;
- The need to have unhoused students before becoming eligible for state construction funding;
- The implementation of full-day kindergarten and reduced class sizes at the K-3 level at all elementary schools;
- Uneven distribution of growth across the district, requiring facilities to balance enrollment;
- Increased critical areas regulations, decreasing the amount of developable areas on school sites;
- An imbalance in the number of elementary schools in the north and south halves of the district;
- Discounted school impact fees and changes to how and when these fees are calculated and paid, none of which supports mitigating the true impact of development;
- The need for additional property and lack of suitable sites within Urban Growth Area (UGA) boundaries to accommodate a school facility;
- The elimination of the ability to develop schools outside of UGAs;
- The inability to add temporary capacity with portable classrooms on school sites without costly stormwater and infrastructure improvements;
- Aging school facilities;
- Projected permanent capacity shortfall by 2025 for K-5 of 1,581 students (with no improvements).

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 30.9 SCC.

\*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 average assessed value by dwelling unit type for all residential units constructed within the district. These figures are provided by Snohomish County. The current average assessed value for 2020 is \$423,231 for single-family detached residential dwellings; \$125,314 for one-bedroom (*Small*) multi-family units, and \$178,051 for two or more bedroom (*Large*) multi-family units.

\*Boeckh Index (See Construction Cost Allocation)

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

Capital Bond Rate means the annual percentage rate computed against capital (construction) bonds issued by the District. for 2020, a rate of 2.44% is used. (See also “Interest Rate”)

\*Capital Facilities means school facilities identified in the District’s capital facilities plan that 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 SCC and meeting the requirements of the GMA and Appendix F of the General Policy Plan. The definition refers to *this* document, which is consistent with the adopted “2015 Facilities Plan for the Lake Stevens School District,” which is a separate document.

Construction Cost Allocation (formerly the Boeckh Index) means a factor used by OSPI as a guideline for determining the area cost allowance for new school construction. The Index for the 2020 Capital Facilities Plan is \$238.22, as provided by Snohomish County.

\*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 (Capital Levy) 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 .00182.

\*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 they are enrolled for the equivalent of a full schedule each full day.



\*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, mid-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 2.44% is used, as provided by Snohomish County. (See also “Capital Bond Rate”)

\*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. In 2020 the District estimates land costs to average \$200,000 per acre.

\*Multi-Family Dwelling Unit means any residential dwelling unit that is not a single-family unit as defined by Chapter 30.66C. SCC<sup>3</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:

- A. to prevent the overbuilding of school facilities,
- B. to meet the needs of service areas within the District, or
- C. 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.

\*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 and high school) that the District determines are typically generated by different dwelling unit types within the District<sup>3</sup>. 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 C)

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

\*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.

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<sup>3</sup> For purposes of calculating Student Generation Rates, assisted living or senior citizen housing are not included.

## 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). Educational Program Standards are the same as the minimum level of service as required by Appendix F of the Growth Management Comprehensive Plan.

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, 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
- Summer School
- Structured Learning Center
- Title 1
- 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.

In addition, districts are wrestling with the outcomes from the McCleary decision and additional funding and requirements from OSPI and the state Legislature. Many of these outcomes, like full-day kindergarten and reduced class sizes at the elementary level and new graduation requirements at the high school level can have significant impacts to the use of facilities. These will need to be incorporated into the District's facility capacities and uses.

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 kindergarten should not exceed **19** students.
- Average class size for grades 1-3 should not exceed **20** students.
- Average class size for grades 4-5 should not exceed **25** students.
- Special Education for students may be provided in a self-contained classroom. The practical capacity for these classrooms is **12** 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 550 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 **27** students.
- Special Education for students may be provided in a self-contained classroom. The practical capacity for these classrooms is 12 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
    - Physical Education
    - Drama
    - Family and Consumer Sciences
    - Art
    - Career and Technical Education

Optimum design capacity for new middle schools is 750 students. Optimum design capacity for new high schools is 1,500 students. *Actual* capacity of individual schools may vary depending on the educational programs offered.

**Minimum Educational Program 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 changes to balance student housing across the system.

The Lake Stevens School District has set minimum educational program standards based on several criteria. Exceeding these minimum standards will trigger significant changes in program delivery. If there are 25 or fewer students in a majority of K-5 classrooms, the standards have been met; if there are 28 or fewer students in a majority of 6-12 classrooms, the minimum standards have been met. The Lake Stevens School District meets these standards at all grade levels.

Table 3-1 – Minimum Educational Program Standards (MEPS) Met

Grade level	Classrooms above MEPS	Total Classrooms	% Meeting MEPS
Kindergarten	0	28	100%
Primary (grades 1-3)	11	74	85%
Intermediate (grades 4-5)	13	52	75%
Total Elementary	24	154	84%
Total Secondary	30	163	82%
District Total	54	317	83%

It should be noted that the minimum educational program 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: seven 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).

The Office of the Superintendent of Public Instruction (OSPI) calculates school capacity by dividing gross square footage of a building by a standard square footage per student. This method is used by the State as a simple and uniform approach for determining school capacity for purposes of allocating available State Match Funds 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 reason, school capacity was determined based on the 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.

**Table 4-1 – School Capacity Inventory**

School Name	Site Size (acres)	Bldg. Area (Sq. Ft.)	Teaching Stations - Regular	Teaching Stations - SPED	Perm. Student Capacity*	Capacity with Portables	Year Built or Last Remodel	Potential for Expansion of Perm. Facility
Elementary Schools								
Glenwood Elementary	9.0	42,673	20	3	462	612	1992	Yes
Highland Elementary	8.7	49,727	20	2	455	655	1999	Yes
Hillcrest Elementary	15.0	49,735	23		496	1,021	2008	Yes
Mt. Pilchuck Elementary	22.0	49,833	21	3	487	687	2008	Yes
Skyline Elementary	15.0	42,673	20	3	468	593	1992	Yes
Stevens Creek Elementary	20.0	78,880	26	2	584	584	2018	Yes
Sunnycrest Elementary	15.0	46,970	24		516	691	2009	Yes
<b>Elementary Total</b>	<b>104.7</b>	<b>360,491</b>	<b>154</b>	<b>13</b>	<b>3,468</b>	<b>4,843</b>		
Middle Schools								
Lake Stevens Middle School	25.0	86,374	27	4	682	979	1996	Yes
North Lake Middle School	15.0	90,323	30	4	720	963	2001	Yes
<b>Middle School Total</b>	<b>40.0</b>	<b>176,697</b>	<b>57</b>	<b>8</b>	<b>1,402</b>	<b>1,942</b>		
Mid-High								
Cavelero Mid-High School	37.0	224,694	66	4	1,584	1,584	2007	Yes
<b>Mid-High Total</b>	<b>37.0</b>	<b>224,694</b>	<b>66</b>	<b>4</b>	<b>1,584</b>	<b>1,584</b>		
High Schools								
Lake Stevens High School	38.0	207,195	92	10	2,176	2,176	2019	Yes
<b>High School Total</b>	<b>38.0</b>	<b>207,195</b>	<b>92</b>	<b>10</b>	<b>2,176</b>	<b>2,176</b>		
<b>District Totals</b>	<b>219.7</b>	<b>969,077</b>	<b>369</b>	<b>35</b>	<b>8,630</b>	<b>10,545</b>		

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

***Leased Facilities***

The District does not lease any permanent classrooms.

***Relocatable Classrooms (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 75 portable classrooms at various school sites throughout the District to provide interim capacity for K-12 students. This compares with 64 portables used in 2018. A typical portable classroom can provide capacity for a full-size class of students. Current use of portables throughout the District is summarized on Table 4-2.



**Table 4-2 – Portables**

School Name	Portable Classrooms	Capacity in Portables	Portable Area (ft <sup>2</sup> )
<b><u>ELEMENTARY SCHOOLS</u></b>			
Glenwood	6	150	5,376
Highland	8	200	7,168
Hillcrest	21	525	18,816
Mt. Pilchuck	8	200	7,168
Skyline	5	125	4,480
Stevens Creek			
Sunnycrest	7	175	6,272
Elementary Total	55	1,375	49,280
<b><u>MIDDLE SCHOOLS</u></b>			
Lake Stevens Middle	11	297	9,856
North Lake Middle	9	243	8,064
Middle Schools Total	20	540	17,920
<b><u>MID-HIGH SCHOOL</u></b>			
Cavelero Mid-High	None		
Mid-High Total			
<b><u>HIGH SCHOOL</u></b>			
Lake Stevens High School	None		
High School Total			
District K-12 Total	75	1,915	67,200

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.

**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**

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

## ***Land Inventory***

The Lake Stevens School District owns five 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 2025). It is presently used as an auxiliary sports field.

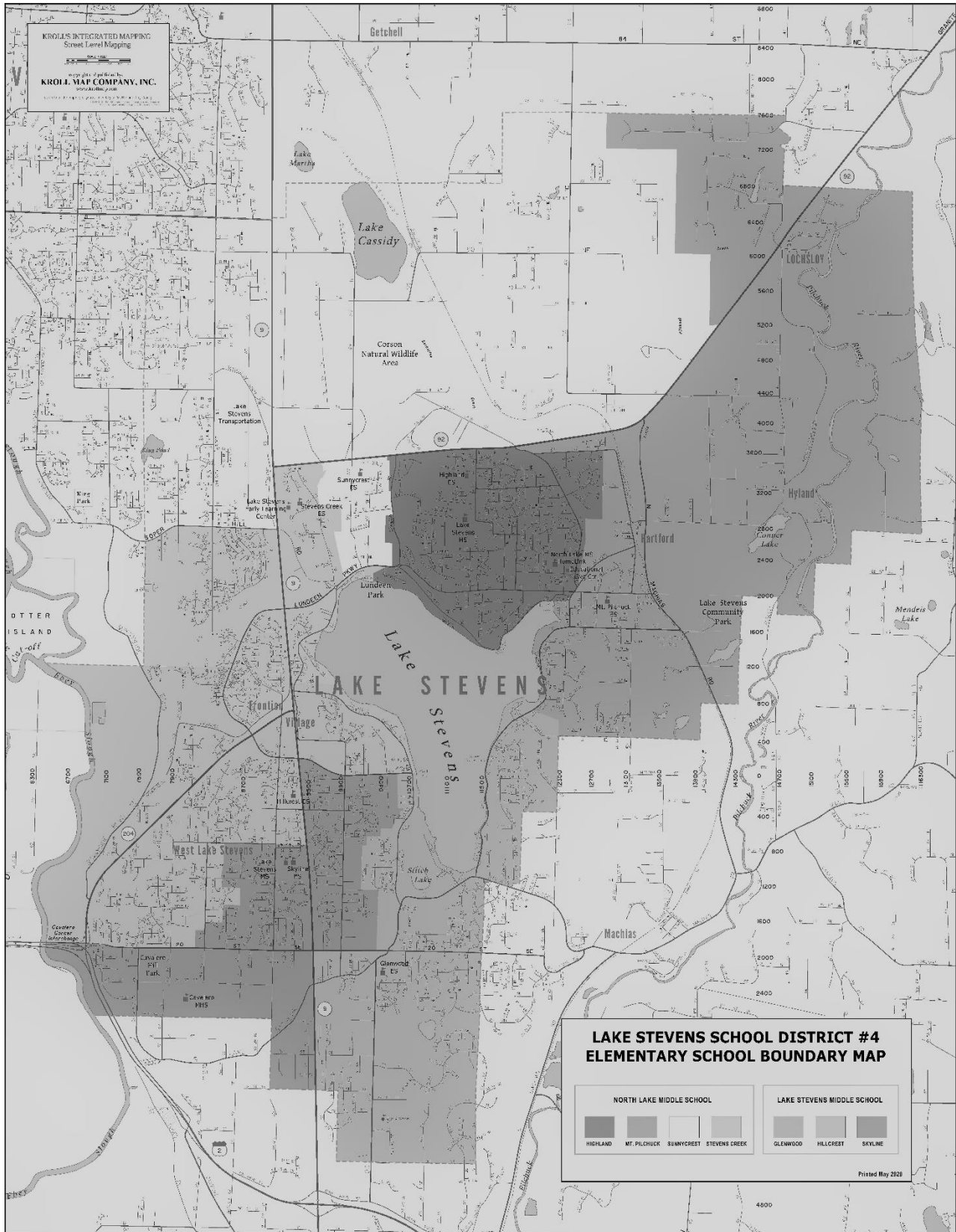
An approximately 35-acre site northeast of the intersection of Highway 9 and Soper Hill Road bordered by Lake Drive on the east. This is the site of the district's newest elementary school and early learning center. The remainder of the site is planned for a future middle school.

A parcel of approximately 23 acres located at 20th Street SE and 83rd 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. It is planned to be a future elementary school.

A 20 ft. x 200 ft. parcel located on 20th 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.

**Figure 1 – Map of District Facilities**

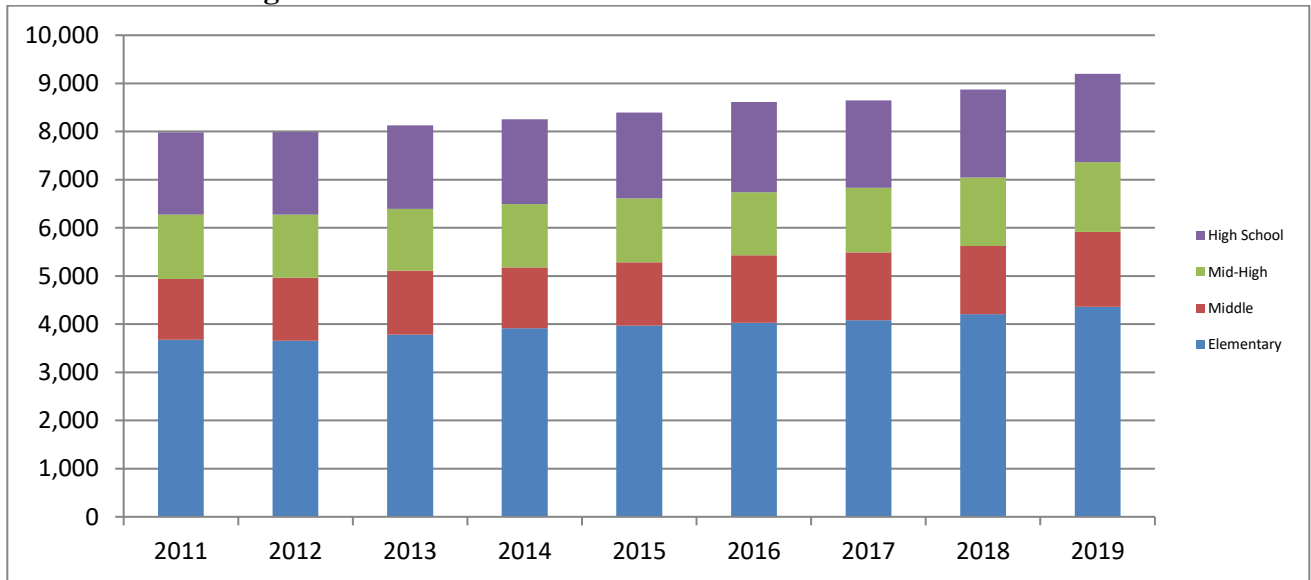


## SECTION 5: STUDENT ENROLLMENT TRENDS AND PROJECTIONS

### **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 2011 and 2019, student enrollment increased by 1,215 students, over 15%. Overall, there was a 2.5% increase countywide during this period, with seven districts losing enrollment. 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 by the County to rise from 43,000 in 2015 to almost 61,000 in Year 2035, an increase of almost 30%.

**Figure 2 – Lake Stevens School District Enrollment 2011-2019**



Enrollment projections are most accurate for the initial years of the forecast period. Moving further into the future, economic conditions and demographic trends in the area affect the estimates. Monitoring population growth for the area are essential yearly activities in the ongoing management of the capital facilities plan. In the event 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. Table 5-1 shows enrollment growth from 2011 to 2019 according to OSPI and District records.

**Table 5-1 - Enrollment 2011-2019**

	2011	2012	2013	2014	2015	2016	2017	2018	2019
<b>Elementary</b>	3,675	3,658	3,783	3,917	3,971	4,030	4,083	4,207	4,362
<b>Middle</b>	1,263	1,307	1,328	1,261	1,314	1,398	1,405	1,414	1,556
<b>Mid-High</b>	1,336	1,313	1,283	1,318	1,331	1,312	1,344	1,426	1,448
<b>High School</b>	1,711	1,709	1,732	1,757	1,776	1,871	1,814	1,828	1,834
<b>Total</b>	<b>7,985</b>	<b>7,987</b>	<b>8,126</b>	<b>8,253</b>	<b>8,392</b>	<b>8,611</b>	<b>8,646</b>	<b>8,875</b>	<b>9,200</b>

The District has used either a Ratio Method for its projections or accepted the projections from the State Office of the Superintendent of Public Instruction (OSPI). The Ratio Method (See Appendix

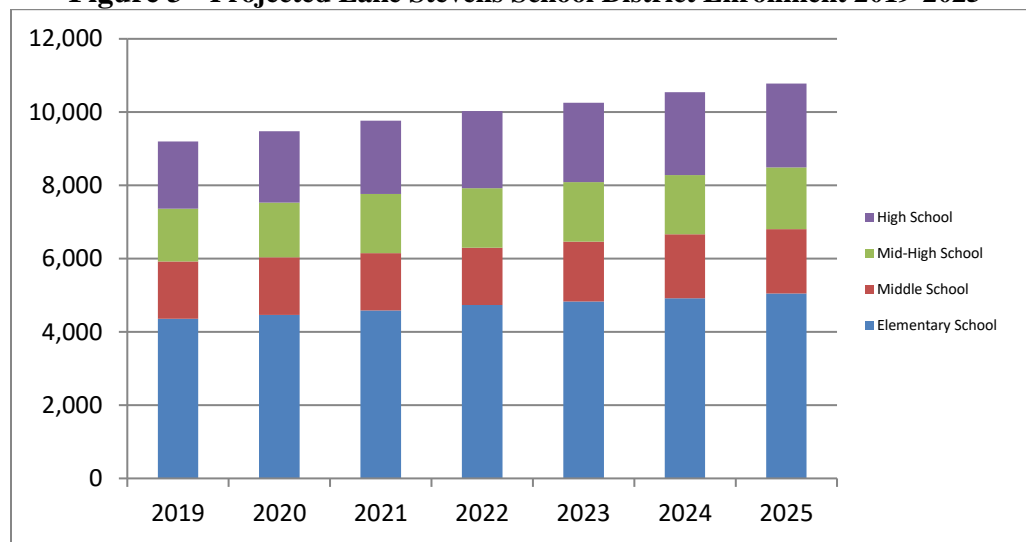
C) estimates future enrollments as a percentage of total population, which is tracked for past years, with assumptions being made for what this percentage will be in future years. Between 2010-2019, the average percentage was just under 20% (19.5%). For future planning, a modest increase of 20.5% was used through 2025 and a figure of 21.8% was used through Year 2035. These assumptions recognize a trend toward lower household sizes coupled with significant growth anticipated in the Lake Stevens area. OSPI methodology uses a modified cohort survival method which is explained in Appendix B.

OSPI Headcount estimates are found in Table 5-2. These have been adopted as part of this Capital Facilities Plan.

**Table 5-2 - Projected Enrollment 2019-2025**

	2019	2020	2021	2022	2023	2024	2025
Elementary School	4,362	4,466	4,585	4,737	4,831	4,918	5,049
Middle School	1,556	1,568	1,567	1,563	1,632	1,744	1,753
Mid-High School	1,448	1,499	1,613	1,624	1,622	1,618	1,692
High School	1,834	1,946	2,004	2,102	2,172	2,264	2,282
<b>Total</b>	<b>9,200</b>	<b>9,479</b>	<b>9,769</b>	<b>10,026</b>	<b>10,257</b>	<b>10,544</b>	<b>10,776</b>

**Figure 3 - Projected Lake Stevens School District Enrollment 2019-2025**



In summary, the OSPI estimates that headcount enrollment will total 10,776 students in 2025. This represents a 17.1% increase over 2019. The District accepts the OSPI estimate for its 2020 CFP planning.

### **2035 Enrollment Projection**

The District projects a 2035 student enrollment of 13,279 based on the Ratio method. (OSPI does not forecast enrollments beyond 2025). The forecast is based on the County’s OFM-based population forecast of 60,912 in the District. Although student enrollment projections beyond 2025 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.

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

<b>Grade Span</b>	<b>Projected 2035 FTE Student Enrollment</b>
Elementary (K-5)	6,247
Middle (6-7)	2,159
Mid-High (8-9)	2,108
High (10-12)	2,765
<b>District Total (K-12)</b>	<b>13,279</b>

The 2035 estimate represents a 44% increase over 2019 enrollment levels. The total population in the Lake Stevens School District is forecasted to rise by 29%. 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.

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.

## SECTION 6: CAPITAL FACILITIES PLAN

### **Existing Deficiencies**

Current enrollment at each grade level is identified in Table 5-2. The District currently (2019) has 894 unhoused students at the elementary level and 154 unhoused students at the middle school level. It has excess capacity at the mid-high school (394) and high school (342) levels.

### **Facility Needs (2020-2025)**

Projected available student capacity was derived by subtracting projected student enrollment from 2019 permanent school capacity (excluding portables) for each of the six years in the forecast period (2020-2025). 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 2025 the District would be over capacity at the elementary level by 1,581 students, 351 students at the middle school level and 106 students at the high school level.

These 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 Chapter 30.66C SCC mandate that new developments cannot be assessed impact fees to correct existing deficiencies. Thus, any capacity deficiencies existing in the District in 2019 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 2020 – 2025**

Grade Span	2019	2020	2021	2022	2023	2024	2025	Growth Related 2020-25
Elementary (K-5)								43.45%
Capacity Surplus/(Deficit)	(894)	(998)	(1117)	(1269)	(1363)	(1450)	(1581)	
Growth Related		(104)	(223)	(375)	(469)	(556)	(687)	
Middle School (6-7)								56.13%
Capacity Surplus/(Deficit)	(154)	(166)	(165)	(161)	(230)	(342)	(351)	
Growth Related		(12)	(11)	(7)	(76)	(188)	(197)	
Mid-High (8-9)								100.00%
Capacity Surplus/(Deficit)	136	85	(29)	(40)	(38)	(34)	(108)	
Growth Related		(51)	(165)	(176)	(174)	(170)	(244)	
High School (10-12)								100.00%
Capacity Surplus/(Deficit)	342	230	172	74	4	(88)	(106)	
Growth Related		(112)	(170)	(268)	(338)	(430)	(448)	

Figures assume no capital improvements.

### **Forecast of Future Facility Needs through 2035**

Additional elementary, middle, mid-high and high school classroom space will need to be constructed between 2020 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 (2025), additional permanent student capacity will be needed as follows:

**Table 6-2 –Additional Capacity Need 2025 & 2035**

<b>Grade Level</b>	<b>2019 Capacity</b>	<b>2019 Enrollment</b>	<b>2025 Additional Capacity Needed</b>	<b>2035 Enrollment</b>	<b>2035 Additional Capacity Needed</b>
Elementary	3,468	4,362	1,581	6,247	2,779
Middle School	1,402	1,556	351	2,159	757
Mid-High	1,584	1,448	108	2,108	524
High School	2,176	1,834	106	2,765	589
<b>Total</b>	<b>8,630</b>	<b>9,200</b>	<b>2,146</b>	<b>13,279</b>	<b>4,649</b>

***Planned Improvements (2020 - 2025)***

The following is a brief outline of those projects likely needed to accommodate unhoused students in the Lake Stevens School District through the Year 2025 based on OSPI enrollment projections.

**Elementary Schools:** Based upon current enrollment estimates, elementary student population will increase to the level of requiring three new elementary schools. The CFP reflects acquisition of land for two schools and the construction of three elementary schools in 2025, although the exact timing is unknown at this time.

**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:** Two additional elementary school sites will be needed in areas 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.

**Support Facilities**

The District has added a satellite pupil transportation lot at Cavelero Mid High to support the growing needs for the district. This is a temporary measure until a site can be acquired and a new, larger pupil transportation center can be built.

***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 2020-2025. 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.



**Table 6-3 – 2020-2025 Capital Facilities Plan**

Estimated Project Cost by Year (In \$Millions)	2020	2021	2022	2023	2024	2025	Total	Local Cost*	State Match
<b>Improvements Adding Student Capacity</b>									
<b>Elementary</b>									
Site Acquisition									
Acres						22	22		
Purchase Cost						\$4.4	\$4.4	\$4.4	\$0.0
Capacity Addition						1100	1100		
Construction Cost						\$135.00	\$135.00	\$81.00	\$54.00
Capacity Addition						1650	1650		
<b>Middle</b>							-		
Site Acquisition							-		
Acres							-		
Purchase Cost							-		
Capacity Addition							-		
Construction Cost							-		
Capacity Addition							-		
<b>Mid-High</b>							-		
Site Acquisition							-		
Acres							-		
Purchase Cost							-		
Capacity Addition							-		
Construction Cost							-		
Capacity Addition							-		
<b>High School</b>							-		
Site Acquisition							-		
Acres							-		
Purchase Cost							-		
Capacity Addition							-		
Construction Cost							-		
Capacity Addition							-		
<b>Total Cost</b>	\$ -	\$ -	\$ -	\$ -	\$ -	\$ 139.4	\$ 139.4	\$ 85.4	\$ 54.0
<b>Improvements Not Adding Student Capacity</b>									
<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>Total Cost</b>	-	-	-	-	-	-	-	-	-
Elementary (including land acquisition)	-	-	-	-	-	\$ 139.4	\$ 139.4	\$ 85.4	\$ 54.0
Middle	-	-	-	-	-	-	-	-	-
Mid-High	-	-	-	-	-	-	-	-	-
High School	-	-	-	-	-	-	-	-	-
District Wide	-	-	-	-	-	-	-	-	-
<b>Annual Total</b>	-	-	-	-	-	\$ 139.4	\$ 139.4	\$ 85.4	\$ 54.0

\*Local Costs include funds currently available, impact fees to be collected and bonds or levies not yet approved.

**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 \$116,000,000 was approved by the electorate in February 2016. Funds have been used to construct a new elementary school and modernize Lake Stevens High School, as well as fund other non-growth-related projects.

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 escalation factor of 6% per year has been applied out to 2025.

**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 state matching funds are dispersed after a district has paid its local share of the project, 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 project with local funds. 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 2020 CFP, the District assumes a 40% match.

**School Impact Fees:** Development impact fees have been adopted by several 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 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 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. Only capacity improvements are eligible for impact fees.

Shown on Table 6-4, since 2012 the Lake Stevens School District has collected and expended the following impact fees:

**Table 6-4 – Impact Fee Revenue and Expenditures**

	<b>Revenue</b>	<b>Expenditure</b>
<b>2020</b>	\$1,604,948	\$ 119,820
<b>2019</b>	\$4,483,964	\$4,177,428
<b>2018</b>	\$1,760,609	\$4,076,918
<b>2016</b>	\$1,595,840	\$1,872,014
<b>2014</b>	\$ 698,188	\$1,389,784
<b>2013</b>	\$1,005,470	\$ 22,304
<b>2012</b>	\$1,526,561	\$-
<b>Total</b>	<b>\$12,675,580</b>	<b>\$11,658,267</b>

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.

The financing plan separates projects and portions of projects that add capacity from those that do not, since non-capacity improvements are not eligible 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 (Table 6-1). 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 6-5 presents an estimate of the capacity impacts of the proposed capital construction projects.

**Table 6-5 – Projected Growth-Related Capacity (Deficit) After Programmed Improvements**

<b>2019</b>	<b>Elementary</b>	<b>Middle</b>	<b>Mid-High</b>	<b>High School</b>
Existing Capacity	3,468	1,402	1,584	2,176
Programmed Improvement Capacity				
Capacity After Improvement	3,468	1,402	1,584	2,176
Current Enrollment	4,362	1,556	1,448	1,834
Surplus (Deficit) After Improvement	(894)	(154)	136	342
<b>2020</b>	<b>Elementary</b>	<b>Middle</b>	<b>Mid-High</b>	<b>High School</b>
Existing Capacity	3,468	1,402	1,584	2,176
Programmed Improvement Capacity				
Capacity After Improvement	3,468	1,402	1,584	2,176
Projected Enrollment	4,466	1,568	1,499	1,946
Surplus (Deficit) After Improvement	(998)	(166)	85	230
<b>2021</b>	<b>Elementary</b>	<b>Middle</b>	<b>Mid-High</b>	<b>High School</b>
Existing Capacity	3,468	1,402	1,584	2,176
Programmed Improvement Capacity	0			
Capacity After Improvement	3,468	1,402	1,584	2,176
Projected Enrollment	4,585	1,567	1,613	2,004
Surplus (Deficit) After Improvement	(1,117)	(165)	(29)	172
<b>2022</b>	<b>Elementary</b>	<b>Middle</b>	<b>Mid-High</b>	<b>High School</b>
Existing Capacity	3,468	1,402	1,584	2,176
Programmed Improvement Capacity				0
Capacity After Improvement	3,468	1,402	1,584	2,176
Projected Enrollment	4,737	1,563	1,624	2,102
Surplus (Deficit) After Improvement	(1,269)	(161)	(40)	74
<b>2023</b>	<b>Elementary</b>	<b>Middle</b>	<b>Mid-High</b>	<b>High School</b>
Existing Capacity	3,468	1,402	1,584	2,176
Programmed Improvement Capacity				
Capacity After Improvement	3,468	1,402	1,584	2,176
Projected Enrollment	4,831	1,632	1,622	2,172
Surplus (Deficit) After Improvement*	(1,363)	(230)	(38)	4
<b>2024</b>	<b>Elementary</b>	<b>Middle</b>	<b>Mid-High</b>	<b>High School</b>
Existing Capacity	3,468	1,402	1,584	2,176
Programmed Improvement Capacity				
Capacity After Improvement	3,468	1,402	1,584	2,176
Projected Enrollment	4,918	1,744	1,618	2,264
Surplus (Deficit) After Improvement*	(1,450)	(342)	(34)	(88)
<b>2025</b>	<b>Elementary</b>	<b>Middle</b>	<b>Mid-High</b>	<b>High School</b>
Existing Capacity	3,468	1,402	1,584	2,176
Programmed Improvement Capacity	1,650			
Capacity After Improvement	5,118	1,402	1,584	2,176
Projected Enrollment	5,049	1,753	1,692	2,282
Surplus (Deficit) After Improvement	69	(351)	(108)	(106)

**Impact Fee 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 District plans to acquire additional land during the six-year planning period, 2020 - 2025. As noted previously, the District will need to acquire two additional elementary school sites between 2020 and 2025.

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 \$200,000 per acre. Until a site is 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 the \$200,000 per acre figure.

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 550 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. Pursuant to a requirement of Chapter 30.66C SCC, each school district was required to conduct student generation studies within their jurisdictions. A description of this methodology is contained in Appendix C. Doyle Consulting performed the analysis. The student generation rates for the Lake Stevens School District are shown on Table 6-6.

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

<b>2020</b>					
<b>Student Generation Rates</b>	<b>Elementary</b>	<b>Middle</b>	<b>Mid-High</b>	<b>High</b>	<b>Total</b>
Single Family	0.362	0.116	0.094	0.125	0.697
Multiple Family, 1 Bedroom	No data	No data	No data	No data	No data
Multiple Family, 2+ Bedroom	0.250	0.073	0.094	0.073	0.490

<b>2018</b>					
<b>Student Generation Rates</b>	<b>Elementary</b>	<b>Middle</b>	<b>Mid-High</b>	<b>High</b>	<b>Total</b>
Single Family	0.337	0.090	0.090	0.112	0.629
Multiple Family, 1 Bedroom	No data	No data	No data	No data	No data
Multiple Family, 2+ Bedroom	0.169	0.071	0.026	0.058	0.324

The table also shows the Student Generation rates from the 2018 CFP. For the last three cycles, the Doyle studies showed no records of one-bedroom apartment construction. The greatest increase was in the elementary, middle and mid-high student generation in 2+ bedroom apartments and condominiums.

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

**Additional Building Capacity:** These figures are the actual capacity additions to the Lake Stevens School District that will occur because 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. SCC.

**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 2017) 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 2025:** 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.

#### **4. Fee Credit Variables**

**Construction Cost Allocation (formerly the Boeckh Index):** This number 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 year for inflation. The current allocation is \$238.22 (January 2020) up from \$225.97 in 2018.

**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%.

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

Under Chapter 30.66C SCC, 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 2.44%.

**Levy Rate (in mils):** 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 0.00182.

**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 for 2020 for single-family detached residential dwellings is \$423,231, up from \$349,255 in 2018 and \$290,763 in 2016); \$125,314 for one-bedroom multi-family unit (\$91,988 in 2018; \$79,076 in 2016), and

\$178,051 for two or more bedroom multi-family units (2018 \$136,499; 2016: \$115,893).

## 6. **Adjustments**

**Growth Related Capacity Percentage:** This is explained in preceding sections (See Table 6-1).

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



**Table 6-7 - Impact Fee Variables**

<b>Criteria</b>	<b>Elementary</b>	<b>Middle</b>	<b>Mid-High</b>	<b>High</b>
<b>Growth-Related Capacity Percentage</b>	43.45%	56.13%	100.00%	100.00%
<b>Discount (Snohomish County, Lake Stevens and Marysville)</b>	50%	50%	50%	50%
<b>Student Factor</b>	<b>Elementary</b>	<b>Middle</b>	<b>Mid-High</b>	<b>High</b>
<b>Single Family</b>	0.362	0.116	0.094	0.125
<b>Multiple Family 1 Bedroom</b>	No data	No data	No data	No data
<b>Multiple Family 2+ Bedroom</b>	0.25	0.073	0.094	0.073
<b>Site Acquisition Cost Element</b>	<b>Elementary</b>	<b>Middle</b>	<b>Mid-High</b>	<b>High</b>
<b>Site Needs (acres)</b>	22			
Growth Related	9.6	0	0	0
<b>Cost Per Acre</b>	\$200,000.00	\$200,000.00	\$200,000.00	\$200,000.00
<b>Additional Capacity</b>	1100			
Growth Related	477			
<b>School Construction Cost Element</b>	<b>Elementary</b>	<b>Middle</b>	<b>Mid-High</b>	<b>High</b>
<b>Estimated Facility Construction Cost</b>	\$135,000,000	\$0	\$0	\$0
Growth Related	\$58,662,239	\$0	\$0	\$0
<b>Additional Capacity</b>	1650			0
Growth Related	716	0	0	0
<b>Current Facility Square Footage</b>	360,491	176,697	224,694	207,195
<b>Relocatable Facilities Cost Element</b>	<b>Elementary</b>	<b>Middle</b>	<b>Mid-High</b>	<b>High</b>
<b>Relocatable Facilities Cost</b>	\$130,044	\$130,044	\$130,044	\$130,044
Growth Related	\$56,508	\$72,987	\$130,044	\$130,044
<b>Relocatable Facilities Capacity/Unit</b>	25	27	27	27
Growth Related	10	15	27	27
<b>Existing Portable Square Footage</b>	49280	17920	0	0
<b>State Match Credit</b>	<b>Elementary</b>	<b>Middle</b>	<b>Mid-High</b>	<b>High</b>
<b>Cost Construction Allocation</b>	\$238.22	\$238.22	\$238.22	\$238.22
<b>School Space per Student (OSPI)</b>	90	117	117	130
<b>State Match Percentage</b>	40.0%	40.0%	40.0%	40.0%
<b>Tax Payment Credit</b>	<b>Elementary</b>	<b>Middle</b>	<b>Mid-High</b>	<b>High</b>
<b>Interest Rate</b>	2.44%	2.44%	2.44%	2.44%
<b>Loan Payoff (Years)</b>	10	10	10	10
<b>Property Tax Levy Rate (Bonds)</b>	0.00182	0.00182	0.00182	0.00182
<b>Average AV per DU Type</b>	<b>SFR</b>	<b>MF 1 Bdrm</b>	<b>MF 2+ Bdrm</b>	
	423,231	125,314	178,051	
		"small unit"	"large unit"	

**Proposed Impact Fee Schedule**

Using the variables and formula described, impact fees proposed for the Lake Stevens School District are summarized in Table 6-8 (refer to Appendix A for worksheets).

**Table 6-8 - Calculated Impact Fees**

<b>Housing Type</b>	<b>Impact Fee Per Unit</b>	<b>Discounted (50%) Impact Fee Per Unit</b>
Single Family Detached	\$19,576	\$9,788
One Bedroom Apartment	\$0	\$0
Two + Bedroom Apartment	\$15,343	\$7,672
Duplex/Townhouse	\$15,343	\$7,672

**Appendix A**  
**Impact Fee Calculations**

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

**SITE ACQUISITION COST**

acres needed	9.60	x	\$ 200,000	/	capacity (# students)	477	x	student factor	0.362	=	\$1,457	(elementary)
acres needed	0.00	x	\$ 200,000	/	capacity (# students)	0	x	student factor	0.116	=	\$0	(middle)
acres needed	0.00	x	\$ 200,000	/	capacity (# students)	0	x	student factor	0.094	=	\$0	(mid-high)
acres needed	0.00	x	\$ 200,000	/	capacity (# students)	0	x	student factor	0.125	=	\$0	(high school)

TOTAL SITE ACQUISITION COST = \$1,457

**SCHOOL CONSTRUCTION COST**

total const. cost	\$58,662,239	/	capacity (# students)	716	x	student factor	0.362	=	\$29,659	(elementary)
total const. cost	\$0	/	capacity (# students)	0	x	student factor	0.116	=	\$0	(middle)
total const. cost	\$0	/	capacity (# students)	0	x	student factor	0.094	=	\$0	(mid-high)
total const. cost	\$0	/	capacity (# students)	0	x	student factor	0.125	=	\$0	(high school)

Subtotal \$29,659

Total Square Feet of Permanent Space (District) 969,077 / Total Square Feet of School Facilities (000) 1,036,277 = 93.52%

TOTAL FACILITY CONSTRUCTION COST = \$27,736

**RELOCATABLE FACILITIES COST (PORTABLES)**

Portable Cost	\$ 56,508	/	10	facility size	x	student factor	0.362	=	\$2,046	(elementary)
Portable Cost	\$ 72,987	/	15	facility size	x	student factor	0.116	=	\$564	(middle)
Portable Cost	\$ 130,044	/	27	facility size	x	student factor	0.094	=	\$453	(mid-high)
Portable Cost	\$ 130,044	/	27	facility size	x	student factor	0.125	=	\$602	(high school)

Subtotal \$3,665

Total Square Feet of Portable Space (District) 67,200 / Total Square Feet of School Facilities (000) 1,036,277 = 6.48%

TOTAL RELOCATABLE COST ELEMENT = \$238

**CREDIT AGAINST COST CALCULATION -- MANDATORY**

**STATE MATCH CREDIT**

CCA Index	<u>\$ 238.22</u>	x OSPI Allowance	<u>90.00</u>	x	State Match %	<u>40.00%</u>	x	student factor	<u>0.362</u>	=	<u>\$3,104</u>	(elementary)
CCA Index	<u>No projects</u>	x OSPI Allowance	<u>117.00</u>	x	State Match %	<u>40.00%</u>	x	student factor	<u>0.116</u>	=	<u>\$0</u>	(middle)
CCA Index	<u>No projects</u>	x OSPI Allowance	<u>117.00</u>	x	State Match %	<u>40.00%</u>	x	student factor	<u>0.094</u>	=	<u>\$0</u>	(mid-high)
CCA Index	<u>No projects</u>	x OSPI Allowance	<u>130.00</u>	x	State Match %	<u>40.00%</u>	x	student factor	<u>0.125</u>	=	<u>\$0</u>	(high school)
<b>TOTAL STATE MATCH CREDIT</b>										=	<u>\$3,104</u>	

**TAX PAYMENT CREDIT**

(((1+ interest rate	<u>2.44%</u>	) <sup>^</sup>	10	years to pay off bond) - 1] /	[ interest rate	<u>2.44%</u>	x					
(1 + interest rate	<u>2.44%</u>	) <sup>^</sup>	10	years to pay off bond ] x	<u>0.00182</u>	capital levy rate	x					
assessed value	<u>423,231</u>							tax payment credit	=		<u>\$</u>	
											<u>6,751</u>	

**IMPACT FEE CALCULATION**

SITE ACQUISITION COST	<u>\$1,457</u>
FACILITY CONSTRUCTION COST	<u>\$27,736</u>
RELOCATABLE FACILITIES COST (PORTABLES)	<u>\$238</u>
(LESS STATE MATCH CREDIT)	<u>(\$3,104)</u>
(LESS TAX PAYMENT CREDIT)	<u>(\$6,751)</u>
	<u>                    </u>
	<u>                    </u>

	Non-Discounted	50% Discount
<b>FINAL IMPACT FEE PER UNIT</b>	<b>\$19,576</b>	<b>\$9,788</b>

IMPACT FEE WORKSHEET

LAKE STEVENS SCHOOL DISTRICT

**MULTIPLE FAMILY RESIDENTIAL -- 1 BDRM OR LESS**

**SITE ACQUISITION COST**

acres needed	9.6	x	\$ 200,000	/	capacity (# students)	477	x	student factor	No data	=	\$0	(elementary)
acres needed	0	x	\$ 200,000	/	capacity (# students)	0	x	student factor	No data	=	\$0	(middle)
acres needed	0	x	\$ 200,000	/	capacity (# students)	0	x	student factor	No data	=	\$0	(mid-high)
acres needed	0	x	\$ 200,000	/	capacity (# students)	0	x	student factor	No data	=	\$0	(high school)

TOTAL SITE ACQUISITION COST = \$0

**SCHOOL CONSTRUCTION COST**

total const. cost	\$58,662,239	/	capacity (# students)	477	x	student factor	No data	=	\$0	(elementary)
total const. cost	\$0	/	capacity (# students)	0	x	student factor	No data	=	\$0	(middle)
total const. cost	\$0	/	capacity (# students)	0	x	student factor	No data	=	\$0	(mid-high)
total const. cost	\$0	/	capacity (# students)	0	x	student factor	No data	=	\$0	(high school)

Subtotal = \$0

Total Square Feet of Permanent Space (District )	<u>969,077</u>	/	Total Square Feet of School Facilities (000)	<u>1,036,277</u>	=	93.52%
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TOTAL FACILITY CONSTRUCTION COST = \$ -

**RELOCATABLE FACILITIES COST (PORTABLES)**

Portable Cost	\$ 56,508	/	10	facility size	x	student factor	No data	=	\$0	(elementary)
Portable Cost	\$ 72,987	/	15	facility size	x	student factor	No data	=	\$0	(middle)
Portable Cost	\$ 130,044	/	27	facility size	x	student factor	No data	=	\$0	(mid-high)
Portable Cost	\$ 130,044	/	27	facility size	x	student factor	No data	=	\$0	(high school)

Subtotal = \$0

Total Square Feet of Portable Space (District )	<u>67,200</u>	/	Total Square Feet of School Facilities (000)	<u>1,036,277</u>	=	6.48%
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TOTAL RELOCATABLE COST ELEMENT = \$0

**CREDIT AGAINST COST CALCULATION -- MANDATORY**

**STATE MATCH CREDIT**

BOECKH Index	\$ 238.22	x OSPI Allowance	90	x	State Match %	40.00%	x	student factor	No data	=	\$0	(elementary)
BOECKH Index	No projects	x OSPI Allowance	117	x	State Match %	40.00%	x	student factor	No data	=	\$0	(middle)
BOECKH Index	No projects	x OSPI Allowance	117	x	State Match %	40.00%	x	student factor	No data	=	\$0	(mid-high)
BOECKH Index	No projects	x OSPI Allowance	130	x	State Match %	40.00%	x	student factor	No data	=	\$0	(high school)
TOTAL STATE MATCH CREDIT										=	\$0	

**TAX PAYMENT CREDIT**

$\frac{[(1 + \text{interest rate})^{10} - 1]}{(1 + \text{interest rate})^{10} - 1}$	2.44%	10	years to pay off bond) - 1] /	[ interest rate	2.44%	x	
				0.001816799	capital levy rate	x	
assessed value	125,314						tax payment credit =
							\$ (1,999)

**IMPACT FEE CALCULATION**

SITE ACQUISITION COST	\$0
FACILITY CONSTRUCTION COST	\$0
RELOCATABLE FACILITIES COST (PORTABLES)	\$0
(LESS STATE MATCH CREDIT)	\$0
(LESS TAX PAYMENT CREDIT)	(\$1,999)

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

IMPACT FEE WORKSHEET

LAKE STEVENS SCHOOL DISTRICT

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

**SITE ACQUISITION COST**

acres needed	9.60	x	\$ 200,000	/	capacity (# students)	477	x	student factor	0.25	=	\$1,006	(elementary)
acres needed	0	x	\$ 200,000	/	capacity (# students)	0	x	student factor	0.073	=	\$0	(middle)
acres needed	0	x	\$ 200,000	/	capacity (# students)	0	x	student factor	0.094	=	\$0	(mid-high)
acres needed	0	x	\$ 200,000	/	capacity (# students)	0	x	student factor	0.073	=	\$0	(high school)

TOTAL SITE ACQUISITION COST = \$1,006

**SCHOOL CONSTRUCTION COST**

total const. cost	\$58,662,239	/	capacity (# students)	716	x	student factor	0.25	=	\$20,483	(elementary)
total const. cost	\$0	/	capacity (# students)	0	x	student factor	0.073	=	\$0	(middle)
total const. cost	\$0	/	capacity (# students)	0	x	student factor	0.094	=	\$0	(mid-high)
total const. Cost	\$0	/	capacity (# students)	0	x	student factor	0.073	=	\$0	(high school)

\$20,483

Total Square Feet of Permanent Space (District )	<u>969,077</u>	/ Total Square Feet of School Facilities (000)	<u>1,036,277</u>	=	93.52%
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TOTAL FACILITY CONSTRUCTION COST = \$ 19,154

**RELOCATABLE FACILITIES COST (PORTABLES)**

Portable Cost	\$ 56,508	/	10	facility size	x	student factor	0.25	=	\$1,413	(elementary)
Portable Cost	\$ 72,987	/	15	facility size	x	student factor	0.073	=	\$355	(middle)
Portable Cost	\$ 130,044	/	27	facility size	x	student factor	0.094	=	\$453	(mid-high)
Portable Cost	\$ 130,044	/	27	facility size	x	student factor	0.073	=	\$352	(high school)

Subtotal \$2,572

Total Square Feet of Portable Space (District )	<u>67,200</u>	/ Total Square Feet of School Facilities (000)	<u>1,036,277</u>	=	6.48%
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TOTAL RELOCATABLE COST ELEMENT = \$167



**CREDIT AGAINST COST CALCULATION -- MANDATORY**

**STATE MATCH CREDIT**

BOECKH Index	\$ 238.22	x OSPI Allowance	90	x	State Match %	40.00%	x	student factor	0.25	=	\$2,144	(elementary)
BOECKH Index	No projects	x OSPI Allowance	117	x	State Match %	40.00%	x	student factor	0.073	=	\$0	(middle)
BOECKH Index	No projects	x OSPI Allowance	117	x	State Match %	40.00%	x	student factor	0.094	=	\$0	(mid-high)
BOECKH Index	No projects	x OSPI Allowance	130	x	State Match %	40.00%	x	student factor	0.073	=	\$0	(high school)
<b>TOTAL STATE MATCH CREDIT</b>										=	<u>\$2,144</u>	

**TAX PAYMENT CREDIT**

$\frac{[(1 + \text{interest rate})^{10} - 1]}{\text{interest rate}}$	2.44%	) ^	10	years to pay off bond) - 1] /	[ interest rate	2.44%	x	
$\frac{(1 + \text{interest rate})^{10}}{\text{assessed value}}$	2.44%	) ^	10	years to pay off bond ] x	0.00182	capital levy rate	x	
assessed value	178,051							tax payment credit = \$ 2,840

**IMPACT FEE CALCULATION**

SITE ACQUISITION COST	\$1,006
FACILITY CONSTRUCTION COST	\$19,154
RELOCATABLE FACILITIES COST (PORTABLES)	\$167
(LESS STATE MATCH CREDIT)	(\$2,144)
(LESS TAX PAYMENT CREDIT)	(\$2,840)
	<u>                    </u>

<b>FINAL IMPACT FEE PER UNIT</b>	Non-Discounted	50% Discount
	<b>\$15,343</b>	<b>\$7,672</b>

**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.

**PROJECTED ENROLLMENT BY GRADE -- OSPI**

<b>Lake Stevens</b>	<b>2019</b>	<b>2020</b>	<b>2021</b>	<b>2022</b>	<b>2023</b>	<b>2024</b>	<b>2025</b>
Kindergarten	708	734	752	771	789	808	827
Grade 1	747	730	757	776	795	814	834
Grade 2	750	775	758	786	805	825	845
Grade 3	694	768	794	776	805	824	845
Grade 4	727	716	792	819	800	830	850
Grade 5	736	743	732	809	837	817	848
<b>K-5 Headcount</b>	<b>4,362</b>	<b>4,466</b>	<b>4,585</b>	<b>4,737</b>	<b>4,831</b>	<b>4,918</b>	<b>5,049</b>
Grade 6	778	769	777	765	846	875	854
Grade 7	778	799	790	798	786	869	899
<b>6-7 Headcount</b>	<b>1,556</b>	<b>1,568</b>	<b>1,567</b>	<b>1,563</b>	<b>1,632</b>	<b>1,744</b>	<b>1,753</b>
Grade 8	709	802	824	814	822	810	896
Grade 9	739	697	789	810	800	808	796
<b>8-9 Headcount</b>	<b>1,448</b>	<b>1,499</b>	<b>1,613</b>	<b>1,624</b>	<b>1,622</b>	<b>1,618</b>	<b>1,692</b>
Grade 10	686	737	695	787	808	798	806
Grade 11	588	643	690	651	737	757	747
Grade 12	560	566	619	664	627	709	729
<b>10-12 Headcount</b>	<b>1,834</b>	<b>1,946</b>	<b>2,004</b>	<b>2,102</b>	<b>2,172</b>	<b>2,264</b>	<b>2,282</b>
<b>K-12 Headcount</b>	<b>9,200</b>	<b>9,479</b>	<b>9,769</b>	<b>10,026</b>	<b>10,257</b>	<b>10,544</b>	<b>10,776</b>

## **Appendix C**

### **OFM Ratio Method – 2035 Enrollment Estimate**

## Enrollment Forecasts OSPI and OFM Ratio Methods

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 estimates how those percentage trends will continue.

Snohomish County prepares the population estimates by distributing official estimates from the Washington Office of Financial Management (OFM) to the school district level. SCC 30.66C requires that these official OFM/County population forecasts be used in the capital facilities plans. Each district is responsible for estimating the assumed percentage of population that, in turn will translate into enrollments.

Year	Enrollment	Population	Ratio
2010	7,913	39,977	19.79%
2011	7,985	40,245	19.84%
2012	7,987	40,716	19.62%
2013	8,126	41,402	19.63%
2014	8,253	41,923	19.69%
2015	8,392	43,037	19.50%
2016	8,611	44,348	19.42%
2017	8,646	45,522	18.99%
2018	8,875	46,491	19.09%
2019	9,200	47,141	19.52%
2020	9,479	48,002	19.75%
2021	9,769	48,862	19.99%
2022	10,026	49,723	20.16%
2023	10,257	50,584	20.28%
2024	10,544	51,444	20.50%
2025	10,776	52,305	20.60%
2035	13,279	60,912	21.80%

The District’s assumed percentage trends are applied to these County population forecasts. This is known as the Ratio Method. The District then decides to use either it or the six-year forecast (2025) prepared by the State Office of the Superintendent of Public Instructions (OSPI) for use in the facilities plan. Whichever is used for the 2019-25 planning period, OSPI does not forecast enrollments for Year 2035, so the Ratio Method is used for that purpose, regardless.

The table at left shows actual enrollments and population estimates from 2010-2019, and their resulting ratio (the 2010 population total is an official census figure).

Until 2018 the trend was a declining ratio of students to population. Then the ratio in 2018 and beyond increased annually, reaching an estimated 20.60% in 2025.

### 2035 Enrollment Estimate

In the District’s 2018 CFP a ratio of 18.90% was used for the 2035 enrollment estimate. Using that number against the County’s 2020 population estimate of 60,912 produces a figure of 11,512 students in 2035. This is only 736 FTEs greater than 2025. Enrollment growth estimates (OSPI) from 2018 – 2025 total 200-300 students per year. If the District were to assume an increase of 250 students per year, that would produce a total of 13,279, a ratio of 21.8%. That would be more consistent with the trends showing for 2022-2025. The District will use this number for its 2035 enrollment estimate.

**Appendix D**  
**Student Generation Rates**

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

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

3/20/2020

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 2012 through December 2018. 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 2020. 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 1,687 single family detached units were compared with data on 9,380 students registered in the District, and the following matches were found by grade level(s)\*:

GRADE(S)	COUNT OF MATCHES	CALCULATED RATE
K	112	0.066
1	102	0.060
2	127	0.075
3	84	0.050
4	99	0.059
5	86	0.051
6	97	0.057
7	99	0.059
8	84	0.050
9	75	0.044
10	89	0.053
11	70	0.041
12	52	0.031
K-5	610	0.362
6-7	196	0.116
8-9	159	0.094
10-12	211	0.125
K-12	1176	0.697

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 fourplexes, triplexes, 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 96 multi-family 2+ BR units were compared with data on 9,380 students registered in the District, and the following matches were found by grade level(s)\*:

GRADE(S)	COUNT OF MATCHES	CALCULATED RATE
K	7	0.073
1	2	0.021
2	1	0.010
3	7	0.073
4	3	0.031
5	4	0.042
6	5	0.052
7	2	0.021
8	2	0.021
9	7	0.073
10	2	0.021
11	2	0.021
12	3	0.031
K-5	24	0.25
6-7	7	0.073
8-9	9	0.094
10-12	7	0.073
K-12	47	0.49

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 period covered by this study.

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

	K-5	6-7	8-9	10-12	K-12
Single Family	.362	.116	.094	.125	.697
Multi-Family 2+ BR	.250	.073	.094	.073	.490

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

**Appendix E**  
**Board Resolution**



**LAKE STEVENS**  
School District

**RESOLUTION NO. 13-20:  
2020-2025 CAPITAL FACILITIES PLAN**

**WHEREAS**, the Lake Stevens School District is required by RCW 36.70 (the Growth Management Act) and the Snohomish County General Policy Plan to adopt a Capital Facilities Plan; and

**WHEREAS**, development of the Capital Facilities Plan was carried out by the District in accordance with accepted methodologies and requirements of the Growth Management Act; and

**WHEREAS**, impact fee calculations are consistent with methodologies meeting the conditions and tests of RCW 82.02 and Snohomish County Code; and

**WHEREAS**, the District finds that the methodologies accurately assess necessary additional capacity which address only growth-related needs; and

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

**WHEREAS**, the District finds that the Plan meets the basic requirements of RCW 36.70A and RCW 82.02; and

**WHEREAS**, a review of the Plan was carried out pursuant to RCW 43.21C (the State Environmental Policy Act). A Determination of Non Significance has been issued.

**NOW, THEREFORE, BE IT RESOLVED** that the Board of Directors of the Lake Stevens School District hereby adopts the Capital Facilities Plan for the years 2020-2025, pursuant to the requirements of RCW 36.70A and the Snohomish County General Policy Plan. The Snohomish County Council, the City of Lake Stevens, and the City of Marysville are hereby requested to adopt the Plan as an element of their general policy plans and companion ordinances.

**ADOPTED**, by the Board of Directors of the Lake Stevens School District No. 4, Snohomish County, state of Washington, at a regular meeting thereof held this 26<sup>th</sup> day of August 2020.

**LAKE STEVENS SCHOOL DISTRICT NO. 4  
BOARD OF DIRECTORS**

\_\_\_\_\_  
President

*[Handwritten signatures of Board Members]*

**ATTEST:**

*[Handwritten signature of Superintendent]*

\_\_\_\_\_  
Superintendent:

**Appendix F**  
**Determination of Nonsignificance**

**DETERMINATION OF NONSIGNIFICANCE**

**Lake Stevens School District No. 4  
Capital Facilities Plan 2020-2025**

**DESCRIPTION OF PROPOSAL:**

The proposed action is the adoption of the Lake Stevens School District No. 4 Capital Facilities Plan, 2020-2025. Board adoption is scheduled to occur on August 26, 2020. This Capital Facilities Plan has been developed in accordance with requirements of the State Growth Management Act and is a non-project proposal. It documents how the Lake Stevens School District utilizes its existing educational facilities given current district enrollment configurations and educational program standards, and uses six-year and 17-year enrollment projections to quantify capital facility needs for years 2020-2025 and 2037.

**PROPONENT:** Lake Stevens School District No. 4

**LOCATION OF PROPOSAL:** Lake Stevens School District No. 4  
Snohomish County, Washington

**LEAD AGENCY:** Lake Stevens School District No. 4

The lead agency for this proposal has determined that the proposal does not have a probable significant adverse impact on the environment. An environmental impact statement (EIS) is not required under RCW 43.21C.030(2)(c). This decision was made after review of an environmental checklist and other information on file with the lead agency. This information is available to the public upon request.

This Determination of Nonsignificance (DNS) is issued under WAC 197-11-340(2). The lead agency will not act on this proposal for 14 days from the published date below. Comments may be submitted to the Responsible Official as named below.

**RESPONSIBLE OFFICIAL:** Robb Stanton  
**POSITION/TITLE:** Executive Director, Operations  
**ADDRESS:** Lake Stevens School District No. 4  
12309 22<sup>nd</sup> Street NE  
Lake Stevens, WA 98258  
**PHONE:** 425-335-1506

**SIGNATURE:**  \_\_\_\_\_

**PUBLISHED:** The Everett Herald – July 31, 2020

There is no agency appeal.

**Appendix G**

**Snohomish County General Policy Plan -- Appendix F**

**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, multifamily/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 180 calendar days prior to their desired effective date.
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**

**2020-2025**

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**Adopted: August 4, 2020**

# **LAKEWOOD SCHOOL DISTRICT NO. 306**

## **CAPITAL FACILITIES PLAN**

**2020-2025**

### **BOARD OF DIRECTORS**

**JAHNA SMITH, PRESIDENT**

**LARRY BEAN**

**LEAHA BOSER**

**CATHERINE “SANDY” GOTTS**

**STEVEN LARSON**

### **SUPERINTENDENT**

**SCOTT PEACOCK**

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## 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 (2020-2025).

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. In the event that impact fees are not available due to action by the state,

county or cities within the District, the District in a future CFP update must identify alternative funding sources to replace the intended impact fee funding.

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

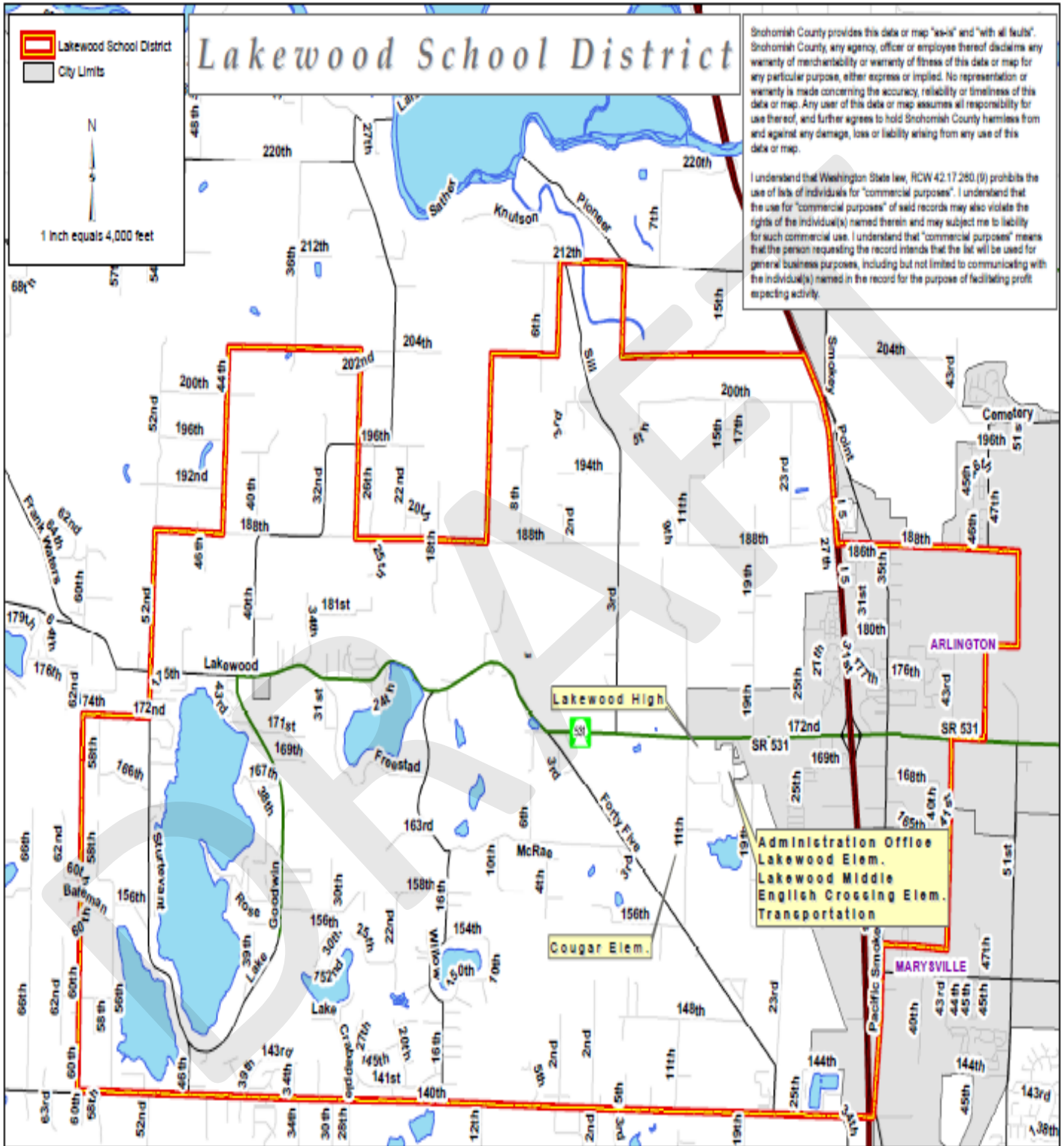
Snohomish County’s Countywide Planning Policies direct jurisdictions in Snohomish County to “ensure the availability of sufficient land and services for future K-20 school needs.” Policy ED-11. The District appreciates any opportunity for cooperative planning efforts with its jurisdictions.

***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 2,514 (October 1, 2019, reported OSPI 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 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.

The educational program standards contained in this CFP reflect the District's implementation of requirements for full-day kindergarten and reduced K-3 class size.

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
- K – 5<sup>th</sup> Grade Special Education Life Skills 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
- 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. New schools are 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 19 students.
- Class size for grade 5th will not exceed 26 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/multipurpose room.

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

- Class size for middle school grades will not exceed 26 students.
- Class size for high school grades will 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. 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 95% at the middle school and 85% 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 Board of Directors following appropriate public review and comment. 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 District’s minimum level of service (“MLOS”) is as follows: on average, K-4 classrooms have no more than 24 students per classroom, 5-8 classrooms have no more than 26 students per classroom, and 9-12 classrooms have no more than 28 students per classroom. The District sets 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 more than 24 students per classroom, 5-8 classrooms have more than 28 students per classroom, or 9-12 classrooms more than 30 students per classroom. 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 MLOS is not the District’s desired or accepted operating standard.

For 2017-18 and 2018-19, the District’s compliance with the MLOS was as follows (with MLOS set as applicable for those school years):

2017-18 School Year						
LOS Standard	<b>MINIMUM LOS# Elementary^</b>	<b>REPORTED LOS Elementary</b>	<b>MINIMUM LOS Middle</b>	<b>REPORTED LOS Middle</b>	<b>MINIMUM LOS High</b>	<b>REPORTED LOS High</b>
	26	19.06	28	22.88	30	21.47

\* The District determines the reported 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 (excludes portables).

2018-19 School Year						
LOS Standard	<b>MINIMUM LOS# Elementary^</b>	<b>REPORTED LOS Elementary</b>	<b>MINIMUM LOS Middle</b>	<b>REPORTED LOS Middle</b>	<b>MINIMUM LOS High</b>	<b>REPORTED LOS High</b>
	26	19.16	28	23.08	30	22.00

\* The District determines the reported MLOS by adding the number of students in regular classrooms at each grade level and dividing that number by the number of teaching stations (excludes portables).

### 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 and reflects the District’s updated educational program standards (reduced K-4 class size) and recently completed capacity addition at Lakewood High School.

Relocatable classrooms are not viewed by the District as a solution for housing students on a permanent basis. Therefore, these facilities are not included 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	403	1994
Cougar Creek	10**	44,217	22	444	2003
Lakewood	*	45,400	16	323	1958, 1997
<b>TOTAL</b>	*	<b>131,047</b>	<b>58</b>	<b>1,170</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	25	618	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	*	169,000	34	850	1982, 2020

\*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 15 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. The District’s relocatable classrooms have adequate useful remaining life and are evaluated regularly.

**Table 2  
Relocatable Classroom (Portable) Inventory**

<b>Elementary School</b>	<b>Relocatable Classrooms</b>	<b>Interim Capacity</b>
English Crossing	2	40
Cougar Creek	4	80
Lakewood	6	120
<b>SUBTOTAL</b>	<b>12</b>	<b>240</b>

<b>Middle School</b>	<b>Relocatable Classrooms</b>	<b>Interim Capacity</b>
Lakewood Middle	3	78
<b>SUBTOTAL</b>	<b>3</b>	<b>78</b>

<b>High School</b>	<b>Relocatable Classrooms</b>	<b>Interim Capacity</b>
Lakewood High	0	0
<b>SUBTOTAL</b>	<b>0</b>	<b>0</b>

<b>TOTAL</b>	<b>15</b>	<b>318</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/Maintenance Shop	5,216
Stadium	14,304

The District is also a party to a cooperative agreement for use of the Marysville School District transportation facility (which is owned by the Marysville School District).

**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, 2019, reported enrollment was 2,514. 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.

### **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 a modified cohort enrollment forecast prepared by a demographer. The District also estimated enrollment based upon adopted Snohomish County population forecasts ("ratio method").

Based on the cohort survival methodology, a total of 2,968 students are expected to be enrolled in the District by 2025, a notable increase from the October 2019 enrollment levels. Notably, the cohort survival method is not designed to anticipate fluctuations in development patterns. The cohort method has not proven to be a reliable measure for the Lakewood School District. For example, the cohort projection in 2017 predicted that the District's October 2019 enrollment would be 2,423, about 91 fewer students than the actual October 2019 enrollment figures. The 2019 cohort projections for 2025, however, show a 19.1% projected increase by the 2025 school year.

The District obtained in 2020 an enrollment forecast from a professional demographer, FLO Analytics. Based on this analysis, a total enrollment of 2,888, or 374 additional students, are expected by the 2025-26 school year. This projection is an increase of nearly 15% over 2019 enrollment. Growth is projected at all three grade levels. The FLO Analytics forecast utilizes historic enrollment patterns, demographic and land use analysis based upon information from Snohomish County and the cities of Arlington and Marysville, census data, OFM forecasts, and Washington State Department of Health birth data. The detailed FLO Analytics forecast report is on file with the District.

Snohomish County provides OFM population-based enrollment projections for the District using OFM population forecasts as adopted by the County. The County provided the District with the estimated total population in the District by year. Between 2012 and 2019, the District's student enrollment constituted approximately 15.74% of the total population in the District. Assuming that between 2020 and 2025, the District's enrollment will continue to constitute 15.74% of the District's total population and using OFM/County data, OFM/County methodology projects a total enrollment of 2,743 students in 2025.

The comparison of OSPI cohort, District projections, and OFM/County projected enrollments is contained in Table 4.

**Table 4**  
**Projected Student Enrollment (FTE)**  
**2020-2025**

Projection	Oct. 2019*	2020	2021	2022	2023	2024	2025	Change 2019-25	Percent Change 2019-25
OFM/County	2,514	2,552	2,590	2,628	2,666	2,704	2,743	229	9.1%
OSPI Cohort**	2,514	2,573	2,660	2,712	2,808	2,885	2,968	454	18.1%
District***	2,514	2,527	2,584	2,667	2,760	2,831	2,888	374	14.88%

\* Actual reported enrollment, October 2019

\*\*Based upon the cohort survival methodology; complete projections located at Appendix A..

\*\*\*FLO Analytics (2020); grade level projections located in Appendix A.

The District is aware of notable pending residential development within the District. Specifically, nearly 300 multi-family units are planned for or currently in construction over the next five year period within the District’s portion of the City of Arlington. In the District’s portion of the City of Marysville, there is ongoing multifamily and single family development are currently under construction. Sustained low to moderate levels of single family development are projected within the District through the next ten years.

Given the District-specific detailed analysis contained in the FLO Analytics report, the District is relying on the projections in that report 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 2025 are highly speculative. Using OFM/County data as a base, the District projects a 2035 student FTE population of 2,878. This is based on the OFM/County data for the years 2012 through 2019 and the District’s average fulltime equivalent enrollment for the corresponding years (for the years 2012 to 2019, the District’s actual enrollment averaged 15.74% 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 2019</b>	<b>Projected Enrollment 2035*</b>
Elementary (K-5)	1,094	1,253
Middle School (6-8)	652	746
High School (9-12)	768	879
<b>TOTAL (K-12)</b>	<b>2,514</b>	<b>2,878</b>

\*Assumes average percentage per grade span remains constant between 2029 and 2035. See Appendix, Table A-2.

Note: Snohomish County Planning and Development Service provided the underlying data for the 2035 projections.

**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 (2020-2025).

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 the 2019-20 school year. 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 2020-2025. Note that this chart is misleading as it reads out growth-related capacity needs related to recent growth within the District.

**Table 6-A\***  
**Additional Capacity Needs**  
**2019-2025**

<b>Grade Span</b>	<b>2019**</b>	<b>2020-21</b>	<b>2021-22</b>	<b>2022-23</b>	<b>2023-24</b>	<b>2024-25</b>	<b>2025-26</b>	<b>Pct. Growth Related</b>
<b>Elementary (K-5)</b>								
Total	0	0	0	0	28	24	9	
Growth Related	--	--	--	--	28	24	9	100%
<b>Middle School (6-8)</b>								
Total	0	0	0	0	0	42	42	
Growth Related	--	--	--	--	--	42	42	100%
<b>High School</b>								
Total	0	0	0	45	69	75	112	
Growth Related***	--	--	--	45	69	75	112	100%

\*Please refer to Table 7 for capacity and projected enrollment information.

\*\*Actual October 2019 Enrollment

\*\*\*Additional “Growth Related Capacity Needs” equal the “Total” for each year less “deficiencies” existing as of 2019. Existing deficiencies as of 2019 include capacity needs related to recent growth from new development through that date.

By the end of the six-year forecast period (2025), 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)	9/(9)
Middle School (6-8)	42/(42)
High School (9-12)	112/(112)
<b>TOTAL UNHOUSED (K-12)</b>	<b>163/(163)</b>

Again, planned construction projects are not included in the analysis in Table 6-B. In addition, 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>2025 Unhoused Students /Growth Related in (Parentheses)</b>	<b>Relocatable Capacity</b>
Elementary (K-5)	9/(9)	240
Middle School (6-8)	42/(42)	78
High School (9-12)	112/(112)	0
<b>Total (K-12)</b>	<b>163(163)</b>	<b>318</b>

Importantly, Table 6-C does not include relocatable adjustments 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 2025 are included in Table 7 and more fully described in Table 8.

**Table 7  
Projected Student Capacity  
2020-2025**

**Elementary School Surplus/Deficiency**

	<b>Oct 2019*</b>	<b>2020</b>	<b>2021</b>	<b>2022</b>	<b>2023</b>	<b>2024</b>	<b>2025</b>
Existing Capacity	1,170	1,170	1,170	1,170	1,170	1,170	1,170
Added Permanent Capacity							162^
Total Permanent Capacity	1,170	1,170	1,170	1,170	1,170	1,170	1,332
Enrollment`	1,094	1,103	1,138	1,163	1,198	1,194	1,179
Surplus (Deficiency)	76	67	32	7	(28)	(24)	153

\* Reported October 2019 enrollment

^ Capacity Addition at Lakewood Elementary

**Middle School Surplus/Deficiency**

	<b>Oct 2019*</b>	<b>2020</b>	<b>2021</b>	<b>2022</b>	<b>2023</b>	<b>2024</b>	<b>2025</b>
Existing Capacity	618	670	670	670	670	670	670
Added Permanent Capacity	52**						198^
Total Permanent Capacity	670	670	670	670	670	670	868
Enrollment	652	634	621	608	643	712	747
Surplus (Deficiency)	18	36	49	62	27	(42)	121

\* Reported October 2019 enrollment

\*\*Addition of STEM Lab and 2 classrooms in Spring 2020

^ Capacity Addition at Lakewood Middle School

**High School Surplus/Deficiency**

	<b>Oct 2019*</b>	<b>2020</b>	<b>2021</b>	<b>2022</b>	<b>2023</b>	<b>2024</b>	<b>2025</b>
Existing Capacity	571	850	850	850	850	850	850
Added Permanent Capacity*	279**						
Total Permanent Capacity	850	850	850	850	850	850	850
Enrollment	768	790	826	895	919	925	962
Surplus (Deficiency)	82	60	24	(45)	(69)	(75)	(112)

\* Reported October 2019 enrollment

\*\*Lakewood High School expansion in 2017. 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.

Table 7 does not include existing, relocated, or added portable facilities.

## 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. 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, which opened in the fall of 2017. 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:**

- Addition of STEM Lab and two classrooms at Lakewood Middle School (spring 2020);
- A planned expansion at Lakewood Elementary School, to create a preschool and early center in order to free up space for K-5 classrooms, subject to future planning analysis and funding; and
- A planned 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:**

- Transportation Facility expansion to Operations Center; and
- Administration Building improvements.

#### **Other:**

- 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 School Construction Assistance 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 State deposits revenue from the sale of renewable resources from State school lands set aside by the Enabling Act of 1889 into the Common School Account. If these sources are insufficient to meet needs, the Legislature can appropriate General Obligation Bond funds or the Superintendent of Public Instruction can prioritize projects for funding. 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 Program (SCAP) funds for certain projects at the 58.12% funding percentage level. The District does not anticipate being eligible for SCAP funds for the projects planned in this CFP.

### ***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 2020-2025. 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	2020	2021	2022	2023	2024	2025	Total Cost	Bonds/ Levy/ Other Local	State Funds	Impact Fees
<b>Elementary School</b> Lakewood El Addition					\$4.0	\$4.0	\$8.00	X		X
<b>Middle School</b> STEM Lab and Class Room Addition at LMS	\$0.550						\$0.555	X		X
Lakewood MS Addition					\$6.0	\$6.0	\$12.00	X		X
<b>High School</b>										
<b>Portables</b>			\$0.250	\$0.750			\$1.000			X
<b>Site Acquisition</b>			\$0.775				\$0.775	X		X

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

Project	2020	2021	2022	2023	2024	2025	Total Cost	Bonds/ Levy/ Other Local	State Funds	Impact Fees
<b>Elementary</b>										
<b>Middle School</b>										
<b>High School</b>										
<b>District Operations Center</b>							\$3.0	X		
<b>District Office</b>							\$7.0-10.0	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 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. A student factor (or student generation rate) is used to identify the average cost per dwelling unit by measuring the average number of students generated by each housing type (single-family dwellings and multi-family dwellings of one bedroom and two bedrooms or more). A description of the student methodology is contained in Appendix B. As required under the GMA, credits are applied in the formula to account for State School Construction Assistance 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:

- Capacity additions at Lakewood Elementary School and Lakewood Middle School.
- Portable acquisition costs at the High School level.

Please see Table 8 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		.193		N/A
Middle		.060		
High		.048		
<b>Total</b>		<b>.301</b>		
<b>Student Generation Factors – Multi Family (1 Bdrm)</b>			<b>Temporary Facility Capacity</b>	
Elementary		.033	Capacity	20/26
Middle		.017	Cost	\$250,000
High		.010		
<b>Total</b>		<b>.050</b>		
<b>Student Generation Factors – Multi Family (2+ Bdrm)</b>			<b>State Match Credit</b>	
Elementary		.063	Current State Match Percentage	58.12%
Middle		.045		(not expected)
High		.063		
<b>Total</b>		<b>.170</b>		
<b>Projected Student Capacity per Facility</b>			<b>Construction Cost Allocation</b>	
Lakewood El (addition) – 162			Current CCA	238.22
Lakewood MS (addition) – 198				
<b>Required Site Acreage per Facility</b>			<b>District Average Assessed Value</b>	
<b>Facility Construction/Cost Average</b>			Single Family Residence	\$420,840
Lakewood El (Addition)		\$8,000,000	<b>District Average Assessed Value</b>	
Lakewood MS (Addition)		\$12,000,000	Multi Family (1 Bedroom)	\$125,314
			Multi Family (2+ Bedroom)	\$178,051
<b>Permanent Facility Square Footage</b>			<b>SPI Square Footage per Student</b>	
Elementary		131,047	Elementary	90
Middle		62,835	Middle	108
High		169,000	High	130
<b>Total</b>	<b>97.12%</b>	<b>362,882</b>		
<b>Temporary Facility Square Footage</b>			<b>District Debt Service Tax Rate for Bonds</b>	
Elementary		6,656	Current/\$1,000	\$1.55
Middle		512		
High		3,584	<b>General Obligation Bond Interest Rate</b>	
<b>Total</b>	<b>2.88%</b>	<b>10,752</b>	Bond Buyer Index (avg February 2020)	2.44%
<b>Total Facility Square Footage</b>			<b>Developer Provided Sites/Facilities</b>	
Elementary		137,703	Value	0
Middle		63,347	Dwelling Units	0
High		172,584		
<b>Total</b>	<b>100.00%</b>	<b>373,634</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	\$3,566
Multi-Family (1 Bedroom)	\$445
Multi-Family (2+ Bedroom)	\$1,641



*\*Table 9 reflects a 50% adjustment to the calculated fee as required by local ordinances.*

**APPENDIX A**

**POPULATION AND ENROLLMENT DATA**

**Table A-1**

**ACTUAL STUDENT ENROLLMENT 2014-2019  
PROJECTED STUDENT ENROLLMENT 2020-2025  
Based on OSPI Cohort Survival\***

School Facilities and Organization  
INFORMATION AND CONDITION OF SCHOOLS  
Enrollment Projections (Report 1049)

**Snohomish/Lakewood(31306)**

Grade	--- ACTUAL ENROLLMENTS ON OCTOBER 1st ---						AVERAGE % SURVIVAL	--- PROJECTED ENROLLMENTS ---					
	2014	2015	2016	2017	2018	2019		2020	2021	2022	2023	2024	2025
Kindergarten	150	142	162	175	178	188		197	206	215	224	232	241
Grade 1	214	166	159	176	179	183	107.27%	202	211	221	231	240	249
Grade 2	183	221	167	173	190	177	103.90%	190	210	219	230	240	249
Grade 3	184	173	227	174	166	194	99.89%	177	190	210	219	230	240
Grade 4	168	174	174	231	175	179	101.05%	196	179	192	212	221	232
Grade 5	178	156	182	177	223	173	98.90%	177	194	177	190	210	219
<b>K-5 Sub-Total</b>	<b>1,077</b>	<b>1,032</b>	<b>1,071</b>	<b>1,106</b>	<b>1,111</b>	<b>1,094</b>		<b>1,139</b>	<b>1,190</b>	<b>1,234</b>	<b>1,306</b>	<b>1,373</b>	<b>1,430</b>
Grade 6	174	186	181	192	186	235	107.29%	186	190	208	190	204	225
Grade 7	181	174	202	174	206	204	104.33%	245	194	198	217	198	213
Grade 8	174	191	187	206	185	213	104.93%	214	257	204	208	228	208
<b>6-8 Sub-Total</b>	<b>529</b>	<b>551</b>	<b>570</b>	<b>572</b>	<b>577</b>	<b>652</b>		<b>645</b>	<b>641</b>	<b>610</b>	<b>615</b>	<b>630</b>	<b>646</b>
Grade 9	169	172	199	176	217	192	101.25%	216	217	260	207	211	231
Grade 10	195	176	170	207	171	220	101.10%	194	218	219	263	209	213
Grade 11	181	180	179	173	203	174	99.11%	218	192	216	217	261	207
Grade 12	167	164	170	174	157	182	92.52%	161	202	178	200	201	241
<b>9-12 Sub-Total</b>	<b>712</b>	<b>692</b>	<b>718</b>	<b>730</b>	<b>748</b>	<b>768</b>		<b>789</b>	<b>829</b>	<b>873</b>	<b>887</b>	<b>882</b>	<b>892</b>
<b>DISTRICT K-12 TOTAL</b>	<b>2,318</b>	<b>2,275</b>	<b>2,359</b>	<b>2,408</b>	<b>2,436</b>	<b>2,514</b>		<b>2,573</b>	<b>2,660</b>	<b>2,717</b>	<b>2,808</b>	<b>2,885</b>	<b>2,968</b>

Notes: Specific subtotaling on this report will be driven by District Grade spans.  
School Facilities and Organization Printed Feb 11, 2020

**Table A-2**

**AVERAGE PERCENTAGE ENROLLMENT BY GRADE SPAN  
(COUNTY/OFM Enrollment Projections)\*\*\***

<b>Enrollment by Grade Span</b>	<b>Oct. 2019*</b>	<b>Avg. %age</b>	<b>2020</b>	<b>2021</b>	<b>2022</b>	<b>2023</b>	<b>2024</b>	<b>2025</b>
Elementary (K-5)	1,094	43.52%	1,111	1,127	1,144	1,160	1,177	1,194
Middle School (6-8)	652	25.93%	662	672	681	691	701	711
High School (9-12)	768	30.55%	779	791	803	815	826	838
<b>TOTAL**</b>	<b>2,514</b>	<b>100%</b>	<b>2,552</b>	<b>2,590</b>	<b>2,628</b>	<b>2,666</b>	<b>2,704</b>	<b>2,743</b>

\*Actual October 2019 Enrollment.

\*\* Totals may vary due to rounding.

\*\*\*Using average percentage by grade span.

**Table A-3**

**PROJECTED ENROLLMENT BY GRADE SPAN  
(DISTRICT - FLO Analytics)\*\***

Grade	2019	2020	2021	2022	2023	2024	2025	2026	2027	2028	2029
K	188	143	171	170	159	166	170	173	175	177	179
1	183	188	146	176	175	164	170	175	178	180	182
2	177	205	213	169	205	203	190	197	203	207	209
3	194	176	204	219	174	211	209	195	203	209	213
4	179	218	197	236	252	202	244	241	226	235	242
5	173	173	207	193	233	248	196	240	237	222	231
6	235	180	182	219	204	248	260	206	254	251	235
7	204	243	185	193	233	216	260	273	216	270	267
8	213	212	254	196	206	248	227	275	289	229	289
9	192	212	210	260	200	212	255	230	272	291	232
10	220	203	225	230	283	219	231	277	244	296	317
11	174	212	193	221	226	280	214	226	260	240	293
12	182	163	198	185	209	215	263	204	205	245	227
<b>Building/Attendance Based (Totals)</b>											
K-5	1,094	1,103	1,138	1,163	1,198	1,194	1,179	1,222	1,223	1,230	1,256
6-8	652	634	621	608	643	712	747	754	759	749	791
9-12	<u>768</u>	<u>790</u>	<u>826</u>	<u>895</u>	<u>919</u>	<u>925</u>	<u>962</u>	<u>936</u>	<u>981</u>	<u>1,072</u>	<u>1,068</u>
K-12	2,514	2,527	2,584	2,667	2,760	2,831	2,888	2,912	2,963	3,052	3,115

Annual District attendance area residence-based forecasts grade totals through 2029. Shown are 2019 actual counts of District students attending in each grade (October), as well as October 1<sup>st</sup> forecasts for each subsequent year. After SIS/HC adjustments. Prior to FTE adjustments.

**APPENDIX B**

**STUDENT GENERATION FACTOR REVIEW**





## MEMORANDUM

To: Dale Leach  
Director of Learning Support and Operations  
Lakewood School District #306

Date: March 13, 2020  
Project: F1867.01.01

From: Tyler Vick  
Managing Director

Handwritten signature of Tyler Vick in black ink.

Jerry Oelerich  
Senior Analyst

Handwritten signature of Jerry Oelerich in black ink.

RE: Student Generation Report—Lakewood School District

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This document details the methodology that FLO Analytics (FLO) used to create the Student Generation Rate (SGR) study for Lakewood School District (the District). Also contained is the process for estimation used for multifamily units in place of missing information from The Lodge Apartments. Finally, SGRs for single-family, 0-1 bedroom multifamily units, and 2 or more bedroom multifamily units are presented at the individual grade level and grade groups.

### **METHODS:**

January 2015 to December 2019 residential records were obtained from the Snohomish County Assessor's office. The data includes information regarding the building size, room count, assessed value and year built, along with a significant amount of other structural data. Data that contained incomplete records or did not coincide with a visual inspection were removed from the final database prior to the calculations. These data were then joined to the Snohomish County parcel data to create a map of all new construction through the past five years. Senior housing was not included in the analysis.

SGRs were calculated for single-family detached, multifamily with 1 bedroom, and multifamily with 2+ bedrooms. Within the 2015 to 2019 timeframe, no condominiums, townhouses, or duplexes (or variations thereof) were constructed, according to data obtained from the Snohomish County Assessor's Office. One manufactured home record does show up within the time frame, and would have been included as a single-family residence, but further investigation indicates the structures were present three years prior to the start of the study period. Assessor's office data also show that mobile home senior facilities were constructed between 2015 and 2019, however, historical imagery indicates these structures have been in place for 15 plus years.

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FLO ANALYTICS | PORTLAND: 503 501 5248 | SEATTLE: 206 724 0616  
WWW.FLO-ANALYTICS.COM

R:\F1867.01 Lakewood School District\Document\01\_2020.03.13 Student Generation Report\Lakewood School District Student Generation Report 2020.docx

FLO Analytics geocoded all October 1, 2019, Kindergarten(K)–12 students from the Student Information System, provided by the District, and selected those that live within the district boundary. The student address points were then compared to the 2015–2019 new construction data. In two instances, geocoded student points fell outside of any of the new construction polygons. In response, the student addresses were verified against the addresses of the nearby apartments and then moved into their correct location. These two datasets were then spatially joined to create a record that indicates the type of development and the number of students living at that location along with all pertinent data for this report, including current grade level.

**Multifamily Developments:** While single-family data is nearly completely accounted for within the Assessor’s data, there are significant data gaps with regard to multifamily information; the number of bedrooms within the building is not included. Additional research was needed to find the number of units and the breakdown of units by bedroom count. Student data includes the unit that they are living in.

FLO reached out to the five new multifamily construction projects in order to ascertain the bedroom count of each of the units, which could then be cross-referenced with student residence data to determine the number of bedrooms in the units that generated students. No student information of any form was shared in these discussions. Bedroom count by unit information was received from Villas at Arlington and Twin Lakes Landing.

Despite repeated inquiries, we were not able to obtain detailed information from Smokey Point Apartments LLC, which consists of The Lodge Apartments Phase 1, 2, and 3. We were able to obtain bedroom type and count data for Phase 3 through CoStar. The percentage of 1 and 2+ bedrooms at Phase 3 were then applied to the total room count at Phase 1 and Phase 2 to create an estimation of the breakdown of bedroom type counts.

With no clear knowledge of which students were living in what type of unit for The Lodge Apartments, additional estimations were needed in order to calculate a student-per-bedroom-type rate. This rate was calculated for Villas at Arlington and Twin Lakes Landing, who provided a complete dataset, and then applied to the estimation of bedroom type counts at The Lodge Phase 1, 2, and known data at Phase 3. The end result is the student-per-bedroom-type rate for all Phases at The Lodge Apartments.

Prior to creating the student-per-bedroom-type rate for The Lodge, any unit at the three complexes that had two or more students living in it were assigned a designation of a 2+ bedroom unit.

## **RESULTS:**

**Single-Family Rates:** The data on all new single-family detached residential units in the Snohomish 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 83 single-family detached units were compared with data on 2,073 students registered in the District, and the following matches were found by grade level(s).

GRADE	MATCHES	RATE
<b>K</b>	4	0.048
<b>1</b>	3	0.036
<b>2</b>	3	0.036
<b>3</b>	2	0.024
<b>4</b>	3	0.036
<b>5</b>	1	0.012
<b>6</b>	1	0.012
<b>7</b>	1	0.012
<b>8</b>	3	0.036
<b>9</b>	0	0.000
<b>10</b>	3	0.036
<b>11</b>	0	0.000
<b>12</b>	1	0.012
<b>K-5</b>	16	0.193
<b>6-8</b>	5	0.060
<b>9-12</b>	4	0.048
<b>K-12</b>	25	0.301

**Multifamily 0 to 1 BR Rates:** The multifamily 0-1 bedroom SGR's were calculated by comparing data on 0-1 bedroom multifamily units with the District's student record data, and the number of students at each grade level living in those units was determined. As of this writing, it is estimated that 299 0-1 bedroom units in total were constructed from 2015 to 2019. Matches to current students are indicated in the table below.

GRADE	MATCHES	RATE
<b>K</b>	1	0.003
<b>1</b>	2	0.007
<b>2</b>	2	0.007
<b>3</b>	1	0.003
<b>4</b>	3	0.010
<b>5</b>	1	0.003
<b>6</b>	1	0.003
<b>7</b>	1	0.003
<b>8</b>	0	0.000
<b>9</b>	0	0.000
<b>10</b>	1	0.003
<b>11</b>	2	0.007
<b>12</b>	0	0.000
<b>K-5</b>	10	0.033
<b>6-8</b>	2	0.007
<b>9-12</b>	3	0.010
<b>K-12</b>	15	0.050

**Multifamily 2+ BR Rates:** The multifamily 2+ bedroom SGR's were calculated by comparing data on 2+ bedroom multifamily units with the District's student record data, and the number of students at each grade level living in those units was determined. Without additional data from The Lodge Apartments, it is estimated that 605 2+ bedroom units in total were constructed from 2015 to 2019. Matches to current students are indicated in the table below.

GRADE	MATCHES	RATE
<b>K</b>	9	0.015
<b>1</b>	9	0.015
<b>2</b>	8	0.013
<b>3</b>	7	0.012
<b>4</b>	3	0.005
<b>5</b>	2	0.003
<b>6</b>	11	0.018
<b>7</b>	7	0.012
<b>8</b>	9	0.015
<b>9</b>	13	0.021
<b>10</b>	7	0.012
<b>11</b>	10	0.017
<b>12</b>	8	0.013
<b>K-5</b>	38	0.063
<b>6-8</b>	27	0.045
<b>9-12</b>	38	0.063
<b>K-12</b>	103	0.170

**Summary of Student Generation Rates:**

Type	K-5	6-8	9-12	K-12
<b>Single Family</b>	0.193	0.060	0.048	0.301
<b>Multifamily 0-1</b>	0.033	0.017	0.010	0.050
<b>Multifamily 2+</b>	0.063	0.045	0.063	0.170

\*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									
DISTRICT	Lakewood School District								
YEAR	2020								
<b>School Site Acquisition Cost:</b>									
((AcresxCost per Acre)/Facility Capacity)xStudent Generation Factor									
	Facility	Cost/	Facility	Student	Student	Student	Cost/	Cost/	Cost/
	Acreage	Acre	Capacity	SFR	MFR (1)	MFR (2+)	SFR	MFR (1)	MFR (2+)
Elementary	10.00	\$ -	475	0.193	0.033	0.063	\$0	\$0	\$0
Middle	20.00	\$ -	600	0.060	0.017	0.045	\$0	\$0	\$0
High	40.00	\$ -	800	0.048	0.010	0.063	\$0	\$0	\$0
						<b>TOTAL</b>	<b>\$0</b>	<b>\$0</b>	<b>\$0</b>
<b>School Construction Cost:</b>									
((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	97.12%	\$ 8,000,000	161	0.193	0.033	0.063	\$9,314	\$1,593	\$3,040
Middle	97.12%	\$ 12,000,000	198	0.060	0.017	0.045	\$3,532	\$1,001	\$2,649
High	97.12%	\$ -	256	0.048	0.010	0.063	\$0	\$0	\$0
						<b>TOTAL</b>	<b>\$12,846</b>	<b>\$2,593</b>	<b>\$5,689</b>
<b>Temporary Facility Cost:</b>									
((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	2.88%	-	20	0.193	0.033	0.063	\$0	\$0	\$0
Middle	2.88%	\$ -	26	0.060	0.017	0.045	\$0	\$0	\$0
High	2.88%	\$ 250,000.00	28	0.048	0.010	0.063	\$12	\$3	\$16
						<b>TOTAL</b>	<b>\$12</b>	<b>\$3</b>	<b>\$16</b>
<b>State School Construction Funding Assistance Credit:</b>									
CCA X SPI Square Footage X District Funding Assistance % X Student Factor									
	CCA	SPI	Funding	Student	Student	Student	Cost/	Cost/	Cost/
		Footage	Asst %	SFR	MFR (1)	MFR (2+)	SFR	MFR (1)	MFR (2+)
Elementary	\$ 238.22	90	0.00%	0.193	0.000	0.063	\$0	\$0	\$0
Middle	\$ 238.22	108	0.00%	0.060	0.017	0.045	\$0	\$0	\$0
High	\$ 238.22	130	0.00%	0.048	0.010	0.063	\$0	\$0	\$0
						<b>TOTAL</b>	<b>\$0</b>	<b>\$0</b>	<b>\$0</b>
<b>Tax Payment Credit:</b>									
							SFR	MFR (1)	MFR (2+)
Average Assessed Value							\$420,840	\$125,314	\$178,051
Capital Bond Interest Rate							2.44%	2.44%	2.44%
Net Present Value of Average Dwelling							\$3,694,664	\$1,100,164	\$1,563,156
Years Amortized							10	10	10
Property Tax Levy Rate							\$1.55	\$1.55	\$1.55
							<b>\$5,727</b>	<b>\$1,705</b>	<b>\$2,423</b>
<b>Fee Summary:</b>									
				Single	Multi-	Multi-			
				Family	Family (1)	Family (2+)			
Site Acquisition Costs				\$0	\$0	\$0			
Permanent Facility Cost				\$12,846	\$2,593	\$5,689			
Temporary Facility Cost				\$12	\$3	\$16			
State SCFA Credit				\$0	\$0	\$0			
Tax Payment Credit				(\$5,727)	(\$1,705)	(\$2,423)			
FEE (AS CALCULATED)				\$7,131	\$890	\$3,282			
<b>Fee (AS DISCOUNTED)</b>				<b>\$3,566</b>	<b>\$445</b>	<b>\$1,641</b>			

# MARYSVILLE SCHOOL DISTRICT NO. 25

## CAPITAL FACILITIES PLAN

2020-2025



**MARYSVILLE**  
SCHOOL DISTRICT

*Engage. Inspire. Prepare.*

*Adopted: August 17, 2020*

# **MARYSVILLE SCHOOL DISTRICT NO. 25**

## **CAPITAL FACILITIES PLAN**

**2020-2025**

### ***BOARD OF DIRECTORS***

Vanessa Edwards, President

Paul Galovin, Vice President

Pete Lundberg

Jake Murray

Chris Nation

Jason Thompson, Superintendent



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For information regarding the Marysville School District 2020-2025 Capital Facilities Plan, contact the Finance and Operations Department, Marysville School District No. 25, 4220 80th Street N.E., Marysville, Washington 98270-3498. Telephone: (360) 965-0094.

## ***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 (2020-2025).

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. In the event that impact fees are not available due to action by the state, county or cities within the District, the District in a future CFP update must identify alternative funding sources to replace the intended impact fee funding.

### ***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 10,198 (October 1, 2019 enrollment) with ten elementary schools, four middle level school, and four high schools (including two comprehensive high schools). 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 also operates the Early Learning Center, housing ECEAP (Early Childhood Education and Assistance Program) as well as special education preschool programs.

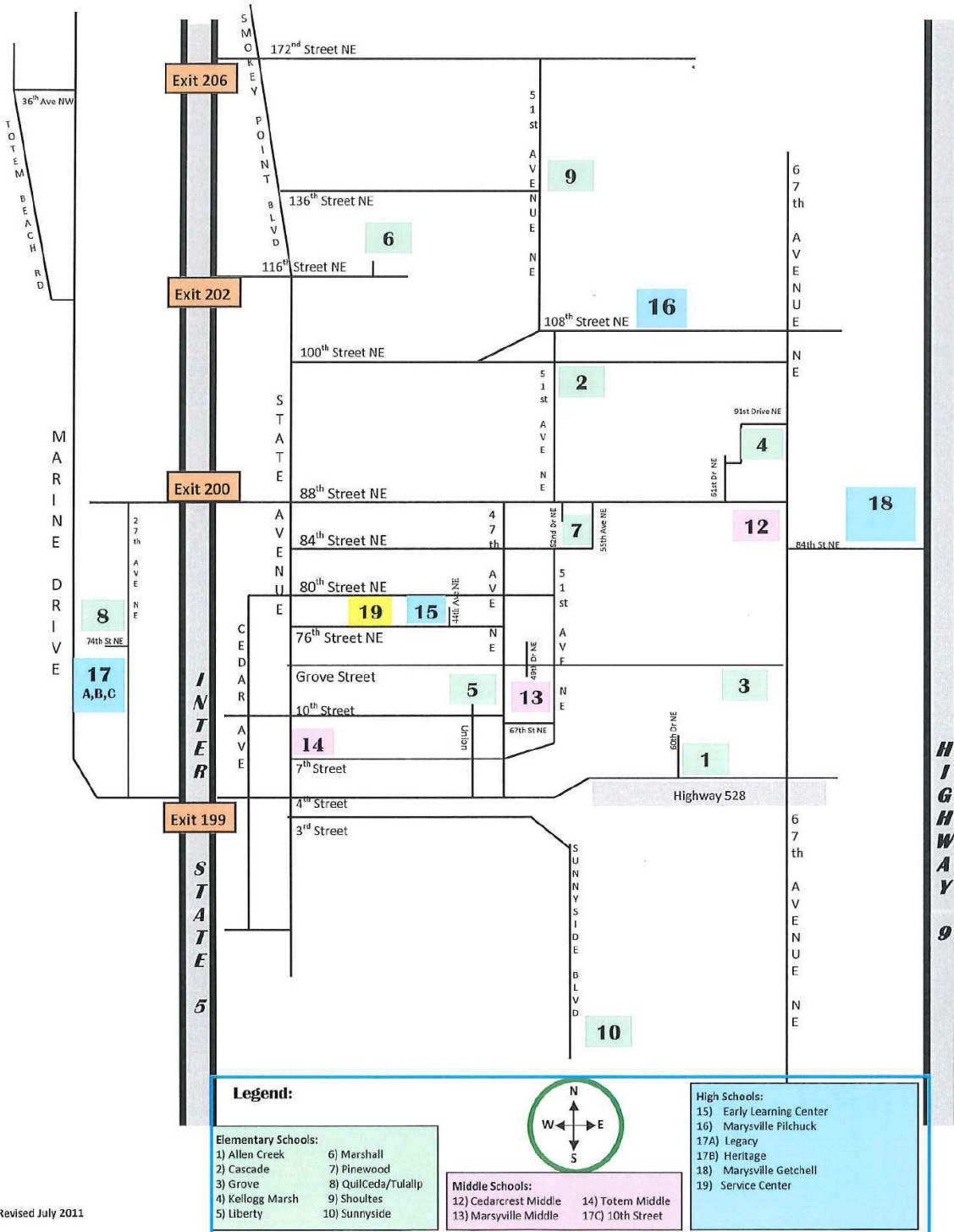
The District has experienced recent declines in enrollment, with a larger than expected decline in the 2019-2020 school year. The District intends to closely monitor enrollment particularly closely and will make adjustments as necessary should recent trends begin to reverse. While the District is not requesting school impact fees as a part of this CFP update, this scenario could change as student enrollment growth changes. Future updates to the CFP will include relevant information.

### ***Facilities and Capacity Needs***

The District encounters a variety of issues that affect the capital facilities planning process. Historically, affordable housing (as compared to Seattle and adjacent cities) in the District tended to draw young families, which puts demands on the school facilities. 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. However, there is currently little housing growth in the pipeline for the Marysville School District boundaries. The District is watching this pipeline carefully so that it may make adjustments as necessary should new development planning start to shift toward more expected residential development within the District.

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 (and a replacement levy was approved in 2018). The District presented a \$120 million capital levy measure to the voters in February 2020 to fund school safety and security improvements and to rebuild Cascade and Liberty Elementary Schools. The District failed to receive sufficient votes for approval of the capital levy proposal. The District's Board of Directors will evaluate the scope and timing of a future bond or capital levy proposal.

# Welcome to the Marysville School District No. 25



Revised July 2011

## ***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. The State Legislature's requirements for full-day kindergarten and reduced K-3 class size impact school capacity and educational program standards. The District has implemented full-day kindergarten classes and K-3 class size reduction. 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	17	24	27
Grades 1 – 3	17	24	27
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 17 students.
- Average class size for grades 1-3 should not exceed 17 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).

For the school years of 2017-18 and 2018-19, the District’s compliance with the minimum educational service standards was as follows (with MLOS set as applicable for those school years):

2017-18 School Year						
LOS Standard	<b>MINIMUM LOS# Elementary</b>	<b>REPORTED LOS Elementary</b>	<b>MINIMUM LOS Middle</b>	<b>REPORTED LOS Middle</b>	<b>MINIMUM LOS High</b>	<b>REPORTED LOS High</b>
	29	25.35	32	23.86	34	23.23

\* The District determines the reported service level by adding the number of students at each grade level and dividing that number by the number of teaching stations (excludes portables).

2018-19 School Year						
LOS Standard	<b>MINIMUM LOS# Elementary</b>	<b>REPORTED LOS Elementary</b>	<b>MINIMUM LOS Middle</b>	<b>REPORTED LOS Middle</b>	<b>MINIMUM LOS High</b>	<b>REPORTED LOS High</b>
	29	25.02	32	25.42	34	21.04

\* The District determines the reported service level by adding the number of students at each grade level and dividing that number by the number of teaching stations (excludes portables).



### ***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 and Two* 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. In addition to the school capacity inventory identified in these tables, the District operates the Early Learning Center (ECEAP program and special education preschool programs).

#### ***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 63 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**

<i>Elementary School</i>	<i>Site Size (Acres)</i>	<i>Building Area (sq ft)</i>	<i>Teaching Stations*</i>	<i>Permanent Capacity**</i>
Allen Creek	11.0	47,594	21.0	412
Cascade	9.5	38,923	21.0	412
Grove	6.2	54,000	24.0	470
Kellogg Marsh	12.8	47,816	21.0	412
Liberty	9.1	40,459	20.0	392
Marshall	13.7	53,063	14.0	274
Pinewood	10.5	40,073	17.0	333
Quil Ceda	10.0	47,594	27.0	529
Shoultes	9.5	40,050	16.0	314
Sunnyside	10.4	39,121	22.0	431
<b>TOTAL</b>	<b>102.7</b>	<b>448,693</b>	<b>203</b>	<b>3,979</b>

\* Teaching Station Definition: A space designated as a classroom. Other stations include spaces designated for special education and pull-out programs.

\*\* Regular classrooms; includes reduced K-3 class size.

**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: Legacy High School, Heritage High School, 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
<b>TOTAL</b>	<b>160.4</b>	<b>522,033</b>	<b>136</b>	<b>3,400</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: Legacy High School, Heritage High School, 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	137
Cascade	3	2	59
Kellogg Marsh	5	2	98
Liberty	6	2	118
Marshall	3	3	59
Pinewood	3	4	59
Quil Ceda	4	4	78
Shoultes	5	3	98
Sunnyside	4	5	78
<b><i>SUBTOTAL</i></b>	<b>40</b>	<b>25</b>	<b>784</b>

<i>Middle Level School</i>	<i>Relocatables</i>	<i>Other Relocatables</i>	<i>Interim Capacity</i>
Cedarcrest	11	2	275
Marysville Middle	7	2	175
Marysville Tulalip Campus	1	0	25
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	1	0	25
Marysville Tulalip Campus	1	0	25
Mountain View	2	0	50
<b><i>SUBTOTAL</i></b>	<b>4</b>	<b>0</b>	<b>100</b>

<b><i>TOTAL</i></b>	<b>63</b>	<b>29</b>	<b>1,359</b>
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\* Each portable is 600 square feet. The District's relocatable facilities identified above have adequate useful remaining life and are evaluated regularly.

\*\*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***

<b><i>Facility</i></b>	<b><i>Building Area (Square Feet)</i></b>	<b><i>Site Size (Acres)</i></b>
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***

<b><i>Site</i></b>	<b><i>Site Size (Acres)</i></b>
4315 71 <sup>st</sup> Ave NE (under sale contract)	7.00
152nd Street Site	35.02
84 <sup>th</sup> Street NE Site – Parcel 1	20.67
84 <sup>th</sup> Street NE Site – Parcel 2	27.75

Development on some of these sites may be restricted due to significant wetlands, limited site sizes, high utility costs, and/or inappropriate locations. In addition to these sites, the District owns one site of less than two acres that is currently under contract for sale.

## ***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.

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 a modified cohort survival projection developed by a demographer in May 2019. The District also calculated an enrollment estimate based upon anticipated Snohomish County population from the County's adopted OFM forecast.

Based on the cohort survival methodology, a total of 9,776 students are expected to be enrolled in the District by 2025, a decrease from the October 2019 enrollment levels. The projected decline reflects the District's experience in recent years of declining enrollment growth at the middle school level and, recently, at the elementary school level. However the OSPI projections also predict a slight increase in enrollment at the high school level over the six year planning period. Notably, the cohort survival method does not anticipate changing development patterns, so it may not capture new development resulting from the rebound in the residential construction industry and as anticipated in the Snohomish County/OFM projections. See Appendix A.

The District obtained in May 2019 an enrollment forecast from a professional demographer, William L. (Les) Kendrick, Ph.D. The low range projection of the Kendrick analysis best reflects (among the low, medium, and high projections in that report) actual October 2019 enrollment in the District. Based on this low range projection, a total enrollment of 10,648, or 137 additional students, are expected by the 2025-26 school year. This projection is a 1.34% increase over 2019 enrollment. Growth is projected at the elementary school level, with declining enrollment at the middle and high school grade levels. The Kendrick analysis utilizes historic enrollment patterns, demographic and land use analysis based upon information from Snohomish County and the City of Marysville, census data, Snohomish County/OFM forecasts and trends, and Washington State Department of Health birth data. The Kendrick projections are included in Appendix A.

A population-based enrollment projection was estimated for the District using OFM population forecasts for Snohomish County. The County provided the District with the estimated total population in the District by year. Between 2014 and 2019, the District's student enrollment constituted approximately 14.48% of the total population in the District. Assuming that between 2020 and 2025, the District's enrollment will continue to constitute 14.48% of the District's total population and using OFM/County data, OFM/County methodology projects a total enrollment of 11,751 students in 2025.

The comparison of the projected enrollment under each methodology is contained in Table 8.

**Table 8**  
**Projected Student Enrollment (FTE)\***  
**2020-2025**

<i>Projection</i>	<i>2019*</i>	<i>2020</i>	<i>2021</i>	<i>2022</i>	<i>2023</i>	<i>2024</i>	<i>2025</i>	<i>Actual Change</i>	<i>Percent Change</i>
OFM/County	10,198	10,456	10,714	10,972	11,230	11,488	11,751	1,553	15.2%
OSPI Cohort	10,198	10,117	10,080	10,041	9,969	9,893	9776	(422)	(4.14)%
District (Kendrick)	10,198	10,132	10,087	10,113	10,141	10,256	10,335	137	1.34%

\*Actual October 2019 enrollment

Based upon the immediate dynamics of the District, as discussed above, the District has chosen to follow the Kendrick analysis during this planning period. This decision will be revisited in future updates to the CFP.

**2035 Enrollment Projections**

Student enrollment projections beyond 2025 and to the future are highly speculative. Assuming that the District’s enrollment will continue to constitute 14.48% of the District’s population through 2035, and assuming that the ratio of students in each grade level stays constant, the projected enrollment by grade span *based upon the County/OFM projections* is as follows:

**Table 9**  
**Projected FTE Student Enrollment – County/OFM**  
**2035**

<i>Grade Span</i>	<i>Projected FTE Enrollment</i>
Elementary (K-5)	6,313
Middle Level School (6-8)	3,157
High School (9-12)	3,683
<b>TOTAL (K-12)</b>	<b>13,153</b>

Again, these estimates are highly speculative given current information and the length of the planning period. The District will continue to monitor enrollment growth and make appropriate adjustments in future updates to the CFP.

**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 (2020-2025). Capacity needs are expressed in terms of “unhoused students”

Table 10 identifies the District’s current permanent capacity needs (based upon information contained in Table 12):

**Table 10**  
**Unhoused Students – Based on October 2019 Enrollment/Capacity**

<i>Grade Span</i>	<i>Unhoused Students/(Available Capacity</i>
Elementary Level (K-5)	(866)
Middle Level (6-8)	(41)
High School Level (9-12)	538

Assuming no permanent capacity additions or adjustments, Table 11 identifies the additional permanent classroom capacity that will be needed in 2025:

**Table 11**  
**Unhoused Students – 2025**

<i>Grade Span</i>	<i>Unhoused Students/(Available Capacity</i>
Elementary Level (K-5)	(1,311)
Middle Level (6-8)	249
High School Level (9-12)	555

Interim capacity provided by relocatable classrooms is not included, though the District expects to continue to use relocatable classrooms to provide for a portion of the capacity needs. Relocatables may be moved from one grade level to another grade level as needed for capacity. (Information on relocatable classrooms by grade level and interim capacity can be found in Table 5.

The District has no currently planned construction projects during this six-year planning period. Future updates to this CFP will include any identified projects.



**Table 12 - Projected Student Capacity**

***Elementary School -- Surplus/Deficiency***

	<b>2019*</b>	<b>2020</b>	<b>2021</b>	<b>2022</b>	<b>2023</b>	<b>2024</b>	<b>2025</b>
Existing Permanent Capacity	3,979	3,979	3,979	3,979	3,979	3,979	3,979
Permanent Capacity Change	0	0	0	0	0	0	0
Total Permanent Capacity**	3,979	3,979	3,979	3,979	3,979	3,979	3,979
Enrollment	4,845	4,904	4,920	4,906	4,999	5,165	5,290
Permanent Capacity Surplus (Deficiency)**	(866)	(925)	(941)	(927)	(1,020)	(1,186)	(1,311)

\*Actual October 2019 enrollment

\*\*Does not include relocatable capacity.

***Middle School Level -- Surplus/Deficiency***

	<b>2019*</b>	<b>2020</b>	<b>2021</b>	<b>2022</b>	<b>2023</b>	<b>2024</b>	<b>2025</b>
Existing Permanent Capacity	2,450	2,450	2,450	2,450	2,450	2,450	2,450
Permanent Capacity Change	0	0	0	0	0	0	0
Total Permanent Capacity**	2,450	2,450	2,450	2,450	2,450	2,450	2,450
Enrollment	2,491	2,413	2,355	2,278	2,295	2,244	2,201
Permanent Capacity Surplus (Deficiency)**	(41)	37	95	172	155	206	249

\*Actual October 2019 enrollment

\*\*Does not include relocatable capacity.

***High School Level -- Surplus/Deficiency***

	<b>2019*</b>	<b>2020</b>	<b>2021</b>	<b>2022</b>	<b>2023</b>	<b>2024</b>	<b>2025</b>
Existing Permanent Capacity	3,400	3,400	3,400	3,400	3,400	3,400	3,400
Permanent Capacity Change	0	0	0	0	0	0	0
Total Permanent Capacity**	3,400	3,400	3,400	3,400	3,400	3,400	3,400
Enrollment	2,862	2,815	2,812	2,929	2,846	2,847	2,845
Permanent Capacity Surplus (Deficiency)**	538	585	588	471	554	553	555

\*Actual October 2019 enrollment

\*\*Does not include relocatable capacity.

## **SECTION SIX: FINANCING PLAN**

### ***Planned Improvements***

At the present time, the District does not have specific plans 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.

The District is using funds from the February 2018 Technology and Capital Levy for technology projects and building maintenance (including roof replacements and heating system maintenance.)

### ***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/Capital Levies:*** Bonds are typically used to fund construction of new schools and other capital improvement projects, and require a 60% voter approval. Capital levies require a 50% voter approval and can be used for certain capital improvement projects. The District presented a \$120 million capital levy in February 2020 to the voters to fund safety/security upgrades and to replace Cascade and Liberty elementary schools. The levy failed to reach the required threshold for approval. Future updates to the CFP will include information related to future bond planning and projects.

***State School Construction Assistance Funds:*** State School Construction Assistance funds come from the Common School Construction Fund. The State deposits revenue from the sale of renewable resources from State school lands set aside by the Enabling Act of 1889 into the Common School Account. If these sources are insufficient to meet needs, the Legislature can appropriate General Obligation Bond funds or the Superintendent of Public Instruction can prioritize projects for funding. 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 certain projects at the 63.21% funding percentage level.

***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 13 demonstrates how the District intends to fund new construction and improvements to school facilities for the years 2020-2025. The financing components include bonds, State School Construction Assistance 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. As previously stated, with the exception of portable purchases, the District currently does not plan to construct new permanent capacity projects within the six-year planning period.

*Table 13 - Capital Facilities Financing Plan*

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

Project	2020	2021	2022	2023	2024	2025	Total Cost	Bonds/ Local Funds	Projected State Funds	Impact Fees
<b>Elementary</b>										
<b>Middle School</b>										
<b>High School</b>										
<b>Portables</b>		\$0.118	\$0.118				\$0.360	X		

\*\*Growth-related

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

Project	2020	2021	2022	2023	2024	2025	Total Cost	Bonds/ Levies	Projected State Funds	Impact Fees
<b>Elementary</b>										
<b>Middle</b>										
<b>High School</b>										
<b>District-wide</b>										
Technology/Misc. Capital Improvements	\$6.000	\$6.000					\$12.000	X		

## ***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 are calculated utilizing the formula in the Snohomish County Code and the Municipal Code for the City of Marysville. Where applicable, 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), all as related to growth needs. As required

under the GMA, credits are applied in the formula to account for State School Construction Assistance Funds to be reimbursed to the District and projected future property taxes to be paid by the dwelling unit.

When an impact fee is calculated, 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. Pursuant to the Snohomish County and the City of Marysville School Impact Fee Ordinances, multi-family dwellings are separated into one-bedroom and two-plus bedroom units. The District does not request school impact fees from the City of Everett as the portion of the District within City of Everett boundaries is largely undevelopable.

The District did not conduct a student generation study for this CFP since it is not requesting school impact fees. Future updates to this CFP, where impact fees are requested, will include an updated student generation rate study.

***Proposed Marysville School District Impact Fee Schedule for Snohomish County and the City of Marysville***

The District does not have capacity projects planned as a part of the 2020 CFP. See discussion in Section 6 above. As such, the District is not requesting the collection of impact fees as a part of this Capital Facilities Plan. The District expects that future project planning and stabilization of enrollment will lead to a renewed request for impact fees in future updates to the Capital Facilities Plan.

**Table 12  
School Impact Fees  
2020**

<b>Housing Type</b>	<b>Impact Fee Per Dwelling Unit</b>
Single Family	\$0
Multi-Family (1 Bedroom)	\$0
Multi-Family (2+ Bedroom)	\$0

## FACTORS FOR ESTIMATED IMPACT FEE CALCULATIONS

<p><b>Student Generation Factors – Single Family</b></p> <p>Elementary Middle Senior</p> <p style="text-align: right;"><b>Total</b>                      <b>N/A</b></p>	<p><b>Average Site Cost/Acre</b> N/A</p>
<p><b>Student Generation Factors – Multi Family (1 Bdrm)</b></p> <p>Elementary Middle Senior</p> <p style="text-align: right;"><b>Total</b>                      <b>N/A</b></p>	<p><b>Temporary Facility Capacity</b> Capacity Cost</p>
<p><b>Student Generation Factors – Multi Family (2+ Bdrm)</b></p> <p>Elementary Middle Senior</p> <p style="text-align: right;"><b>Total</b>                      <b>N/A</b></p>	<p><b>State School Construction Assistance</b> Current Funding Percentage                      63.21%</p>
<p><b>Projected Student Capacity per Facility</b> N/A</p>	<p><b>Construction Cost Allocation</b> Current CCA                      238.22</p>
<p><b>Required Site Acreage per Facility</b> N/A</p>	<p><b>District Average Assessed Value</b> Single Family Residence                      \$372,400</p>
<p><b>Facility Construction Cost</b> N/A</p>	<p><b>District Average Assessed Value</b> Multi Family (1 Bedroom)                      \$125,314</p> <p><b>District Average Assessed Value</b> Multi Family (2+ Bedroom)                      \$178,051</p>
<p><b>Permanent Facility Square Footage</b></p> <p>Elementary                      448,693 Middle                      322,567 Senior                      522,033</p> <p style="text-align: right;"><b>Total    94.50%                      1,293,293</b></p>	<p><b>SPI Square Footage per Student</b></p> <p>Elementary                      90 Middle                      108 High                      130</p>
<p><b>Temporary Facility Square Footage</b></p> <p>Elementary                      39,000 Middle                      13,800 Senior                      2,400</p> <p style="text-align: right;"><b>Total    5.50%                      55,200</b></p>	<p><b>District Property Tax Levy Rate (Bonds)</b> Current/\$1,000                      \$0.8347</p>
<p><b>Total Facility Square Footage</b></p> <p>Elementary                      487,693 Middle                      336,367 Senior                      524,433</p> <p style="text-align: right;"><b>Total    100%                      1,348,493</b></p>	<p><b>General Obligation Bond Interest Rate</b> Current Bond Buyer Index                      2.44%</p> <p><b>Developer Provided Sites/Facilities</b></p> <p>Value                      0 Dwelling Units                      0</p>
	<p>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.</p>

**APPENDIX A**

**POPULATION AND ENROLLMENT DATA**





School Facilities and Organization  
 INFORMATION AND CONDITION OF SCHOOLS  
 Enrollment Projections (Report 1049)

Snohomish/Marysville(31025)

Grade	--- ACTUAL ENROLLMENTS ON OCTOBER 1st ---						AVERAGE % SURVIVAL	--- PROJECTED ENROLLMENTS ---					
	2014	2015	2016	2017	2018	2019		2020	2021	2022	2023	2024	2025
Kindergarten	812	848	836	808	788	810		795	789	783	777	770	764
Grade 1	957	771	859	877	810	781	100.09%	811	796	790	784	778	771
Grade 2	891	952	781	867	891	797	100.33%	784	814	799	793	787	781
Grade 3	848	874	942	765	863	853	98.04%	781	769	798	783	777	772
Grade 4	827	838	897	940	782	834	100.01%	853	781	769	798	783	777
Grade 5	817	843	810	889	945	770	99.33%	828	847	776	764	793	778
<b>K-5 Sub-Total</b>	<b>5,152</b>	<b>5,126</b>	<b>5,125</b>	<b>5,146</b>	<b>5,079</b>	<b>4,845</b>		<b>4,852</b>	<b>4,796</b>	<b>4,715</b>	<b>4,699</b>	<b>4,688</b>	<b>4,643</b>
Grade 6	802	775	802	779	848	897	95.29%	734	789	807	739	728	756
Grade 7	827	793	766	800	779	838	99.25%	890	728	783	801	733	723
Grade 8	863	812	788	759	791	756	98.50%	825	877	717	771	789	722
<b>6-8 Sub-Total</b>	<b>2,492</b>	<b>2,380</b>	<b>2,356</b>	<b>2,338</b>	<b>2,418</b>	<b>2,491</b>		<b>2,449</b>	<b>2,394</b>	<b>2,307</b>	<b>2,311</b>	<b>2,250</b>	<b>2,201</b>
Grade 9	856	891	840	815	744	777	101.27%	766	835	888	726	781	799
Grade 10	911	851	890	824	814	754	99.71%	775	764	833	885	724	779
Grade 11	807	818	747	798	705	657	86.69%	654	672	662	722	767	628
Grade 12	843	776	739	722	752	674	94.59%	621	619	636	626	683	726
<b>9-12 Sub-Total</b>	<b>3,417</b>	<b>3,336</b>	<b>3,216</b>	<b>3,159</b>	<b>3,015</b>	<b>2,862</b>		<b>2,816</b>	<b>2,890</b>	<b>3,019</b>	<b>2,959</b>	<b>2,955</b>	<b>2,932</b>
<b>DISTRICT K-12 TOTAL</b>	<b>11,061</b>	<b>10,842</b>	<b>10,697</b>	<b>10,643</b>	<b>10,512</b>	<b>10,198</b>		<b>10,117</b>	<b>10,080</b>	<b>10,041</b>	<b>9,969</b>	<b>9,893</b>	<b>9,776</b>

Notes: Specific subtotalling on this report will be driven by District Grade spans.

# Low Range Projection

## Marysville Enrollment History

	<u>2004</u>	<u>2005</u>	<u>2006</u>	<u>2007</u>	<u>2008</u>	<u>2009</u>	<u>2010</u>	<u>2011</u>	<u>2012</u>	<u>2013</u>
County Births	8675	8924	9070	9570	9795	9237	9001	8925	9226	9406
% of Cohort	10.2%	9.5%	9.4%	9.4%	9.5%	8.8%	9.4%	9.4%	8.8%	8.4%
City of Marysville	648	716	808	846	877	849	847	860	864	893
K % of City Cohort	136.3%	118.9%	105.8%	106.1%	106.4%	95.3%	100.1%	97.3%	93.5%	88.4%

	<u>Oct-09</u>	<u>Oct-10</u>	<u>Oct-11</u>	<u>Oct-12</u>	<u>Oct-13</u>	<u>Oct-14</u>	<u>Oct-15</u>	<u>Oct-16</u>	<u>Oct-17</u>	<u>Oct-18</u>
K	883	851	855	898	933	809	848	837	808	789
1	859	890	861	830	903	957	771	859	878	810
2	871	843	879	860	848	891	952	781	867	891
3	904	846	830	857	844	848	874	942	764	863
4	886	899	858	834	824	827	838	897	939	782
5	917	874	885	844	834	816	843	810	889	945
6	879	891	853	845	830	802	775	802	779	848
7	851	859	903	874	855	826	793	767	799	779
8	866	831	852	895	843	866	812	791	759	791
9	881	852	838	876	919	864	895	842	815	744
10	874	892	900	854	905	926	860	892	825	815
11	849	862	842	821	793	828	828	753	802	706
12	980	987	943	900	877	874	796	746	723	756
Total	11500	11377	11299	11188	11208	11134	10885	10719	10647	10519
Change	-165	-123	-78	-111	20	-74	-249	-166	-72	-128
% Change	-1.4%	-1.1%	-0.7%	-1.0%	0.2%	-0.7%	-2.2%	-1.5%	-0.7%	-1.2%
K-5	5320	5203	5168	5123	5186	5148	5126	5126	5145	5080
6-8	2596	2581	2608	2614	2528	2494	2380	2360	2337	2418
9-12	3584	3593	3523	3451	3494	3492	3379	3233	3165	3021

## Low Range Projection

### Projected Births

	<u>2014</u>	<u>2015</u>	<u>2016</u>	<u>2017</u>	<u>2018</u>	<u>2019</u>	<u>2020</u>	<u>2021</u>	<u>2022</u>	<u>2023</u>
County Births	9524	9766	10045	9877	10034	10124	10062	10088	10114	10142
K % of Cohort	8.6%	8.5%	8.7%	8.7%	8.7%	9.1%	9.1%	9.1%	9.1%	9.1%
City of Marysville	885	901	956	962	961	963	965	969	968	971
K % of City Cohort	92.2%	92.0%	91.9%	89.8%	91.3%	96.0%	95.3%	95.1%	95.4%	95.5%

	<u>Oct-19</u>	<u>Oct-20</u>	<u>Oct-21</u>	<u>Oct-22</u>	<u>Oct-23</u>	<u>Oct-24</u>	<u>Oct-25</u>	<u>Oct-26</u>	<u>Oct-27</u>	<u>Oct-28</u>
K	816	829	879	864	878	925	919	922	924	926
1	796	813	826	876	862	880	928	922	924	927
2	803	784	813	828	882	870	889	937	931	933
3	867	782	766	796	814	869	858	876	923	917
4	847	867	785	770	803	824	879	868	886	934
5	767	830	852	773	761	796	817	872	861	879
6	894	722	784	806	734	725	759	779	831	821
7	833	878	712	774	799	730	721	755	774	826
8	759	813	860	698	762	789	721	712	746	765
9	792	760	814	861	698	765	792	723	715	748
10	728	775	746	800	849	691	757	784	716	707
11	701	626	668	645	695	740	602	659	683	623
12	658	654	584	623	604	652	694	565	618	641
Total	10251	10132	10087	10113	10141	10256	10335	10373	10532	10648
Change	-268	-119	-45	26	27	116	79	37	159	116
% Change	-2.6%	-1.2%	-0.4%	0.3%	0.3%	1.1%	0.8%	0.4%	1.5%	1.1%
K-5	4886	4904	4920	4906	4999	5165	5290	5396	5449	5517
6-8	2486	2413	2355	2278	2295	2244	2201	2245	2351	2411
9-12	2879	2815	2812	2929	2846	2847	2845	2731	2732	2719

**APPENDIX B**

***SCHOOL IMPACT FEE CALCULATIONS***

**This section is not updated for the 2020-2025 Capital Facilities Plan since no Impact Fee is requested. Future updates to this CFP may include an Impact Fee.**

**APPENDIX C**

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

**This section is not updated for the 2020-2025 Capital Facilities Plan since no Impact Fee is requested. Future updates to this CFP may include an Impact Fee with updated Student Generation Rates.**



**MONROE SCHOOL DISTRICT**

**CAPITAL FACILITIES PLAN  
2020–2025**

Adopted: August 10, 2020

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

## **BOARD OF DIRECTORS**

Jim Langston, President  
Darcy Cheesman, Vice President  
Shawn Anderson  
Jennifer Bumpus  
Chuck Whitfield

## **SUPERINTENDENT**

Dr. Justin Blasko

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## CHAPTER 1 -- INTRODUCTION

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

The Monroe School District (the “District”) has prepared this Capital Facilities Plan (“CFP”) to assess the facilities needed to accommodate projected student enrollment at acceptable levels of service, as well as a more detailed schedule and financing program for capital improvements, over the next six years (2020-2025). The CFP is intended to be shared with the City of Monroe and Snohomish County. In accordance with the Growth Management Act, adopted Snohomish County policies, and local ordinances governing school impacts, this CFP contains the following required elements:

- Future enrollment forecasts for each grade span (elementary schools, middle 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.
- As applicable, 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. In the event that impact fees are not available due to action by the state, county or cities within the District, the District in a future CFP update must identify alternative funding sources to replace the intended impact fee funding.

Snohomish County’s Countywide Planning Policies direct jurisdictions in Snohomish County to “ensure the availability of sufficient land and services for future K-20 school needs.” Policy ED-11. The District appreciates any opportunity for cooperative planning efforts with its jurisdictions.



## **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 and encompasses the City of Monroe and portions of unincorporated Snohomish County.

The District currently serves a student population of 6,083 (October 1, 2019, adjusted enrollment) with five elementary school campuses, two middle schools, and one high school. Leaders in Learning, an individualized secondary program, is also offered as a standalone program at the Wagner Center. 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 facility. 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.

The District provides fiscal and administrative support for the Youth Re-Engagement program housed off-site at Everett Community College (EvCC) in Everett, Washington. It also provides a graduate retrieval program through Shoreline Community College (SCC). These programs do not use District facilities and are therefore the enrollment needs are not included when determining the District's facility needs. The District previously operated WAVA High School, a virtual high school for students in grades 9-12. The District recently discontinued the WAVA program. The WAVA program did not use District facilities. The District has modified its past enrollment figures to exclude actual enrollment for the WAVA High School, the SCC graduate retrieval program, and EvCC U-3 program enrollment figures from the District's FTE enrollment figures.

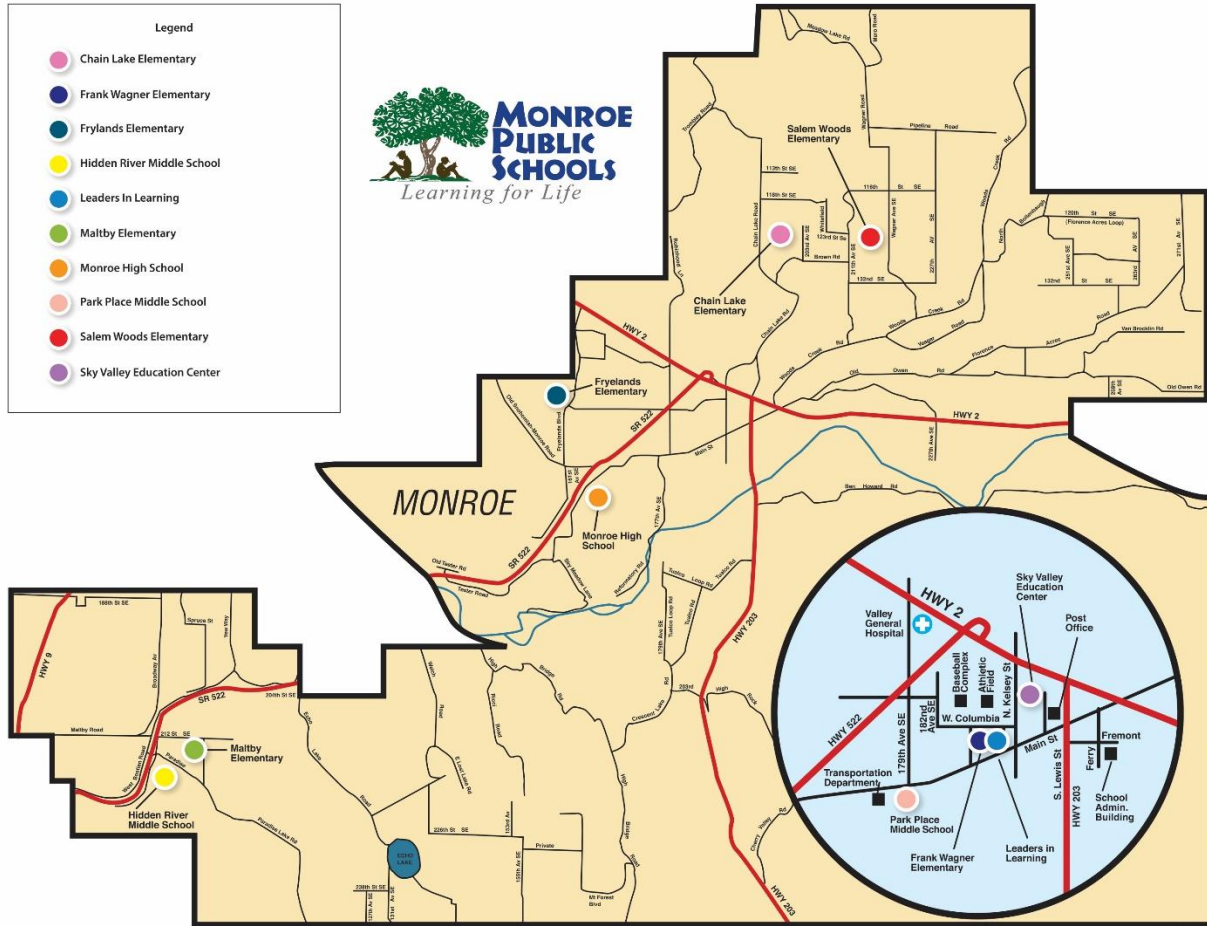
## **Significant Issues Related To Facility Planning In the Monroe School District**

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. In addition, implementation of State requirements for full-day kindergarten and reduced K-3 class size also impact school capacity and educational program standards.

The District is currently implementing and nearing completion on projects approved by the voters in April 2015. These projects will help address some issues with aging school facilities and capacity needs. The District is the planning stages for a proposed future bond measure. The anticipated projects in the future bond proposal would also address modernization and expansion of school facilities as well as the potential for a new elementary school to address continuing growth projections.

# MAP – MONROE SCHOOL DISTRICT

- Legend
- Chain Lake Elementary
  - Frank Wagner Elementary
  - Frylands Elementary
  - Hidden River Middle School
  - Leaders In Learning
  - Maltby Elementary
  - Monroe High School
  - Park Place Middle School
  - Salem Woods Elementary
  - Sky Valley Education Center



December 2014

## CHAPTER 2 – 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.

The District's implementation, now complete, of required full-day kindergarten and reduced K-3 class size affected school capacity and educational program standards.

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

- Special education pre-school
- Special education - resource, moderate and profound, behavioral and behavioral support
- ELL/ESL
- Title I LAP
- 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

Variations in student capacity among schools are often a result of what special or nontraditional programs are offered at specific schools. These special programs require classroom space which can reduce the permanent capacity of some of the buildings housing these programs. Some students, for example, leave their regular classroom for a short period of time to receive instruction

in these special programs. Newer schools within the District have been designed to accommodate most of these programs. However, older schools often require space modifications to accommodate special programs, and in some circumstances, these modifications may reduce the overall classroom capacities of the buildings.

District educational program standards will undoubtedly change in the future as a result of changes in the program year, special programs, class sizes, grade span configurations, and use of new technology, as well as other physical aspects of 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-3 should not exceed 20 students.
- Class size for grades 4-5 should not exceed 26 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.
- 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 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 Board of Directors following appropriate public review and comment.

The District has set minimum educational service standards based on several criteria. The standards in the 2020 CFP are adjusted to reflect implementation of reduced K-3 class size and other elements of District program delivery. Exceeding these minimum standards will trigger significant changes in program delivery. If there are more than 24 students per classroom in a majority of K-3 classrooms, more than 26 students per classroom in the majority of 4-5 classrooms, or more than 30 students in a majority of grade 6-12 classrooms, the minimum standards have not been met. 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 standard is just that, a minimum, and not the desired or accepted operating standard.

In summary, the District’s “minimum level of service” is that there are no more than 26 students in the majority of grade K-4 classrooms and no more than 30 students in the majority of grade 5-12 classrooms. For the school years of 2017-18 and 2017-19, the District’s compliance with the minimum level of service was as follows (and based on the previously adopted MLOS of K-4 set at 26 and 5-12 set at 30):

2017-18 School Year						
LOS Standard	<b>MINIMUM LOS# Elementary</b>	<b>REPORTED LOS Elementary</b>	<b>MINIMUM LOS Middle</b>	<b>REPORTED LOS Middle</b>	<b>MINIMUM LOS High</b>	<b>REPORTED LOS High</b>
	27	20.9	30	21.2	30	23.4

\* The District determines the reported service level by adding the number of students at each grade level and dividing that number by the number of teaching stations.

2018-19 School Year						
LOS Standard	<b>MINIMUM LOS# Elementary</b>	<b>REPORTED LOS Elementary</b>	<b>MINIMUM LOS Middle</b>	<b>REPORTED LOS Middle</b>	<b>MINIMUM LOS High</b>	<b>REPORTED LOS High</b>
	27	20.7	30	21.5	30	21.9

\* The District determines the reported service level by adding the number of students at each grade level and dividing that number by the number of teaching stations.

## CHAPTER 3 – CAPITAL FACILITIES INVENTORY

Under the Growth Management Act 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 chapter 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 Chapter 2). A map showing locations of District facilities is provided on page 3.

### 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.

The U3 Program and a graduate retrieval program through Shoreline Community College do not require District housing.

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

**Table 1 - Elementary School Capacity Inventory**

	Site Size (acres)	Building Area (Sq. Ft.)	Teaching Stations	Program Student Capacity	Year Built or Last Remodel	Potential for Expansion
<b>Elementary School</b>						
Chain Lake	14.4	46,207	21	462	1990	yes**
Frank Wagner	10.21	68,408	34	748	2018	yes
Fryelands	7.09	54,074	20	440	2005	no
Maltby	10	50,230	24	528	2005	no*
Salem Woods	13.78	50,545	25	550	2018	yes
SVEC (part) ***	6	40,905	14	308	1980	no
<b>Totals</b>	<b>61.48</b>	<b>310,369</b>	<b>138</b>	<b>3,036</b>		

\* Septic system capacity limits expansion

\*\* Holding tank capacity limits expansion potential

\*\*\* Sky Valley Ed Center capacities prorated by daily usage.

**Table 2 - Middle School Capacity Inventory**

	Site Size (acres)	Building Area (Sq. Ft.)	Teaching Stations	Program Student Capacity*	Year Built or Last Remodel	Potential for Expansion
<b>Middle School</b>						
Park Place Middle	19.4	135,684	41	953	2018	yes
Hidden River	20	84,341	25	581	2019	yes
SVEC (part) **		22,652	8	220	1980	no
<b>Totals</b>	<b>39.4</b>	<b>242,677</b>	<b>74</b>	<b>1,754</b>		

\* Calculated at 83% room utilization

\*\* Sky Valley Ed Center capacities prorated by daily usage.

**Table 3 - High School Capacity Inventory**

	Site Size (acres)	Building Area (Sq. Ft.)	Teaching Stations	Program Student Capacity*	Year Built or Remodel	Potential for Expansion
<b>High School</b>						
Monroe HS	33	209,432	72	1,815	2005	yes
Leaders In Learning	**	14,250	7	176	1980	yes
SVEC (part) ***		21,440	7	209	1980	no
<b>Totals</b>	<b>33</b>	<b>245,122</b>	<b>86</b>	<b>2,200</b>		

\* Calculated at 90% room utilization

\*\* Leaders in Learning located in a portion of the Wagner Center

\*\*\* Sky Valley Ed Center capacities prorated by daily usage.

**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 1-3 above. The District uses 28 portables at various school sites throughout the District providing interim capacity and administrative support needs

**Table 4 – Portable Classroom Inventory**

	Number of Portables	Capacity	Building Area (Sq. Ft.)
Chain Lake Elementary	6	132	5,460
Salem Woods Elementary	3	66	2,688
Hidden River Middle <sup>^</sup>	5	110	6,370
Sky Valley Ed. Ctr	0	0	0
Monroe High School	8*	186	7,560
Preschool/Head Start	3	40	2,679
District Office	2	0	2,504
Transportation	1	0	952
	28	534	28,213

<sup>^</sup> All portables moving offsite (1 to Transportation, 4 to MHS) in the summer of 2020.

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



**Table 5 - Inventory of Support Facilities**

Facility Name	Site Size (Acres)	Building Area (sq ft)
District Admin Office and Warehouse	3.5	21,584
Maintenance Shops	0.2	5,459
Transportation	3.4	6,612
Totals	7.1	33,655

The District in January 2020 entered into a lease agreement with option to purchase for 2.48 acres of developed property (with an existing 31,151 square foot building) located at 14692 179th Ave SE in Monroe. The property is being renovated for use as the District's Administrative Office. The District expects to be able to occupy the renovated building in 2020 and will thereafter determine disposition of the existing Administrative Office located at 200 East Fremont Street in Monroe.

**LAND INVENTORY**

The District owns one undeveloped parcel of 14.5 acres adjacent to Chain Lake Elementary. The District had intended to build a middle school 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 13.2 acre piece of property on the Old Owen corridor in 2007. The property will be used for an elementary school.

The District owns approximately 13 acres located on West Columbia Street in the City of Monroe commonly known as Memorial Stadium/Marshall Fields. The District is considering the potential surplus and sale of this Property.

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 Softball Field. The District also owns a 35 acre parcel off of Echo Falls Road in Maltby that was deeded to the District by two families. It was originally used as an outdoor education site. The property is composed primarily of wetlands and beaver ponds, with approximately two acres of buildable land, and has limited access issue.

A 31.6 acre site deeded to the District by the BPA 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. The District also may need to acquire property for elementary expansion needs.

## CHAPTER 4 – STUDENT ENROLLMENT HISTORY AND PROJECTIONS

Facility needs are determined in part by evaluating recent trends in adjusted student enrollment. The District’s October 2019 adjusted enrollment was 6,083. This figure does not include students participating in U-3 or CEO/LCN programs<sup>1</sup> because those programs do not use District facilities. It also does not include out of district special education students. Future enrollment in these programs is expected to remain steady over the next six years. Notably, the OSPI enrollment reports and cohort projections incorporate enrollment data for both students enrolled in programs using District facilities and not using District facilities. (See Appendix A.) For purposes of this CFP and determining facility needs and anticipated enrollment projections, the District uses enrollment data for only those in-District students enrolled in programs using District facilities.

### RECENT TRENDS - STUDENT ENROLLMENT IN DISTRICT FACILITIES

In looking at recent trends and for purposes of comparing past enrollment to future projections, the District treated Kindergarten enrollment as a 1.0 FTE since the District has implemented full-day Kindergarten. This provides a one to one comparison from year to year. Again, the recent enrollment trends consider only those students enrolled in District facilities. Over the previous six years, the District’s enrollment peaked in 2016-17 after several years of growth but has declined in the last three years. Table 6 shows the actual student enrollment in District facilities during the years 2012-2019.

**Table 6- Total Student Enrollment  
Monroe School District 2012-2019  
(Adjusted FTE in District Facilities)**

Enrollment by Grade Span	2012-13	2013-14	2014-15	2015-16	2016-17	2017-18	2018-19	2019-20
Elementary (K-5)	2,805	2,817	2,893	2,922	2,930	2,859	2,857	2,806
Middle School (6-8)	1,523	1,496	1,462	1,450	1,457	1,452	1,464	1,460
High School (9-12)	1,927	1,935	1,942	1,938	1,934	1,941	1,815	1,817
<b>TOTAL</b>	<b>6,255</b>	<b>6,249</b>	<b>6,297</b>	<b>6,310</b>	<b>6,321</b>	<b>6,252</b>	<b>6,136</b>	<b>6,083</b>

<sup>1</sup> U3 and CEO/LCN 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.

## **PROJECTED STUDENT ENROLLMENT (2020-2025)**

Enrollment in the District, after several years of an upward trend that peaked in the 2016-17 school year, marginally declined in the last three years. K-12 enrollment in Snohomish County is growing but is concentrated currently in other areas. However, new housing development planned within the District boundaries is expected to bring new enrollment growth over the six year planning period.

Two enrollment forecasts were conducted for the District: a modified cohort survival projection prepared by a professional demographer and an estimate based upon County population as provided by OFM (“ratio method”).

Enrollment projections often rely on the cohort survival methodology as a base. That methodology 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 second grade is compared to the previous year’s first grade enrollment. The ratio of these two numbers (second grade enrollment divided by first grade enrollment) creates a “cohort survival 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. At the kindergarten level, enrollment is compared to the county births 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.

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. As a result, cohort survival can produce large forecast errors because it does not consider possible changes in demographic trends. New housing, especially, 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 and housing growth will dampen enrollment gains. Changes in the housing market between 2007 and 2011 and the accompanying recession, for example, caused many districts to see a decline in their enrollment during that time period.

The modified cohort survival methodology combines the cohort survival method with information about market share gains and losses from private schools, information about population growth from 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.

The modified cohort survival projection, with its analysis of historical patterns and District-specific demographic and market data, best reflects anticipated enrollment in the District. Those projections show an expected total enrollment of 6,261, or increase of 2.9%, by 2025. Enrollment after 2025 is expected to continue to grow. See *Appendix A* for more detail.

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 2012 and 2019, the District’s housed student enrollment constituted approximately 15.84% of the total population in the District. Assuming that between 2020 and 2025, the District’s enrollment will continue to constitute 15.84% of the District’s total population and using OFM/County data, OFM/County methodology projects a total enrollment of 6,723 students in District facilities in 2025.

**Table 7- Projected Student Enrollment  
2020-2025  
(FTE in District Facilities)**

<b>Projection</b>	<b>Oct. 2019*</b>	<b>2020</b>	<b>2021</b>	<b>2022</b>	<b>2023</b>	<b>2024</b>	<b>2025</b>	<b>Change 2019-25</b>	<b>Percent Change 2019-25</b>
<b>OFM/County</b>	<b>6,083</b>	<b>6,189</b>	<b>6,295</b>	<b>6,401</b>	<b>6,507</b>	<b>6,613</b>	<b>6,723</b>	<b>640</b>	<b>10.5%</b>
<b>Modified Cohort/District</b>	<b>6,083</b>	<b>6,104</b>	<b>6,123</b>	<b>6,201</b>	<b>6,210</b>	<b>6,6260</b>	<b>6,261</b>	<b>178</b>	<b>2.9%</b>

\*Actual adjusted FTE in District facilities, October 2019

For the reasons discussed above, the District is using the modified cohort survival projections for purposes of planning for the District’s facility needs during the six years of this plan period. Future updates to the Plan may revisit this issue.

**PROJECTED STUDENT ENROLLMENT (POST-2025)**

Student enrollment projections beyond 2025 are highly speculative. Using OFM/County data as a base, the District projects a 2035 student FTE population of 7,030. This is based on the OFM/County data for the years 2012 through 2019 and the District’s average fulltime equivalent enrollment in District facilities for the corresponding years (for the years 2012 to 2019, the District’s actual enrollment averaged 15.84% 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 8. Again, these estimates are highly speculative and are used only for general planning purposes.

**Table 8**  
**Projected Student Enrollment**  
**2035**

<b>Grade Span</b>	<b>FTE Enrollment – October 2019</b>	<b>Projected Enrollment 2035*</b>
Elementary (K-5)	2,806	3,243
Middle School (6-8)	1,460	1,688
High School (9-12)	1,817	2,099
<b>TOTAL (K-12)</b>	<b>6,083</b>	<b>7,030</b>

\*Assumes average percentage per grade span. See Table 6.

Note: Snohomish County Planning and Development Service provided the underlying data for the 2035 projections.

## CHAPTER 5 – PROJECTED FACILITY NEEDS

### NEAR-TERM FACILITY NEEDS ( THROUGH 2025)

*Current* enrollment at each grade level is identified in Table 6 which provides the actual enrollment in District facilities as of October 1, 2019. *Projected* available student capacity was derived by subtracting projected FTE student enrollment from existing October 2019 school capacity (Tables 1-3). 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>2</sup>.

To determine future facility needs, existing school program capacity was compared to projected enrollment throughout the six-year forecast period. Without the consideration of portables, the District currently has a small capacity deficiency at the K-5 level (see Table 11). Table 9 assumes no new capacity construction through 2025. This factor is added in later (see Table 11).

Table 9 shows actual space needs and the portion of those needs that are “growth related” for the years 2020-2025.

**Table 9**  
**Available Student Capacity 2019-2025**

Grade Span	2019 Enrollment	Existing Permanent Capacity <sup>^</sup>	2019 Surplus	2025 Enrollment	2025 Surplus/(Deficit)
<b>K-5</b>	2,806	3,036	230	3,056	(20)
<b>6-8</b>	1,460	1,745	285	1,426	319
<b>9-12</b>	1,817	2,200	383	1,779	421

<sup>^</sup>Existing as of Oct. 2019.

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<sup>2</sup> Information on portables and interim capacity can be found in Table 4.

## CHAPTER 6 – CAPITAL FACILITIES FINANCING PLAN

### NEW SCHOOL CONSTRUCTION

In April 2015, the District’s voters passed a \$110.9 million bond issue for school construction to modernize and expand existing facilities and provide Districtwide improvements and major maintenance. The District is currently in the planning stages for an anticipated bond proposal to add capacity during the six years of this planning period, as further detailed herein. The identified future bond project proposals are subject to the District’s Board of Directors deciding, via resolution, to send the proposal to the voters for consideration. The school construction projects are summarized in Table 10. The primary source of funding for these projects is from the bond proceeds and supplemented by State School Construction Assistance funds and impact fees.

#### Elementary Level Projects

##### *Approved 2015 Bond Projects:*

Salem Woods Elementary: Add new capacity for 132 students, with associated spaces additions at Salem Woods Elementary, along with modernization of the existing facility to bring it up to current building code and educational standards. Project complete in 2018.

Frank Wagner Elementary: Add new capacity for 308 students and construct a new library and computer lab. Project complete in 2018.

##### *Anticipated Future Bond Projects:*

Salem Woods Elementary Phase II: Add new capacity for 88 students. Project projected to be complete in 2025 (assuming bond approval).

Frank Wagner Elementary: Add new capacity for 88 students as a part of modernization project. Project projected to be complete in 2025 (assuming bond approval).

Chain Lake Elementary: Add new capacity for 88 students plus an additional special education classroom as a part of modernization project. Project projected to be complete by or soon after the 2025-26 school year (assuming bond approval).

New Elementary No. 6: Construct a new 550 student elementary school to serve projected student enrollment growth. This project is projected to be outside of the six-year planning period of this Capital Facilities Plan (assuming bond approval).

#### Middle School Level Projects

##### *Approved 2015 Bond Projects:*

Hidden River Middle: Construct Phase 3 Addition to the building, providing housing for an additional 139 students (including general classrooms and specialized classrooms for science, art, career/technology) and expanding the kitchen to serve the additional student load. Project complete in 2019.

Park Place Middle School: Perform complete renovation plus some demolition and replacement of older buildings to bring it up to meet current building codes and educational standards. Project includes replacement classrooms, new commons, kitchen and auxiliary gym, remodel of existing gym, and capacity addition for 23 students. Project complete in 2018.

### High School Level Projects

#### *Approved 2015 Bond Projects:*

Monroe High School: Convert a currently unusable outdoor physical education space to all weather space. The net effect will be the addition of three new teaching stations. Project complete in 2018.

### District Level Projects

#### *Approved 2015 Bond Projects:*

Four million dollars is allocated for a variety of facility improvements and major maintenance at all schools.

#### *Anticipated Future Bond Projects:*

Park Place, Building F: Under consideration for modernization. Specific use tbd.

### Portable Classrooms

The District may need to add portable classrooms to address unanticipated enrollment increases.

## **FINANCING FOR PLANNED IMPROVEMENTS**

### General Obligation Bonds

Bonds are typically used to fund construction of new schools and other capital improvement projects. A 60% voter approval is required to approve the issuance of bonds. Bonds are then retired through collection of property taxes.

The 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. In April 2015, the District's voters approved a \$110.9 million bond measure to fund the improvements described above in this Chapter 6 (with the exception of portable facilities).

The District is currently planning for a proposed bond measure to fund the projects described above



under “anticipated Future Bond Projects.” The anticipated bond project proposals are subject to the District’s Board of Directors deciding, via resolution, to send the proposal to the voters for consideration.

### State School Construction Assistance

State School Construction Assistance funds come from the Common School Construction Fund. The State deposits revenue from the sale of renewable resources from State school lands set aside by the Enabling Act of 1889 into the Common School Account. If these sources are insufficient to meet needs, the Legislature can appropriate General Obligation Bond funds or the Superintendent of Public Instruction can prioritize projects for funding. 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 certain projects at the 53.35% funding percentage level.

### 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.

### 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 2020-2025. The financing components include bond funds, impact fees, and 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. See Chapter 5.

### Alternative Actions

In the event that planned construction projects are not funded as expected or do not fully address space needs for student growth, the Board could consider various courses of action, including, but not limited to:

- Alternative scheduling options;
  - Grade configuration changes;
  - Increased class sizes; or
  - Modified school calendar.
- Changes in the instructional model;

**Table 10 – Planned Construction Projects (Figures in Millions of Dollars)**

**Improvements Adding Permanent Capacity (only projects estimated to be completed by 2025-26)**

Project	2020*	2021	2022	2023	2024	2025	Total Cost	Bond/ Local**	State Match	Impact Fees
<b>Elementary School</b>										
Proposed Salem Woods Expansion					\$3.740	\$3.000	\$6.744	X	X	X
Proposed Frank Wagner Expansion					\$3.185	\$2.000	\$5.185	X	X	X
Proposed Chain Lake Elementary Expansion					\$7.750	\$6.000	\$11.750	X	X	X
<b>Middle School</b>										
<b>High School</b>										
<b>Site Acquisition</b>										
<b>Portables</b>							TBD			

\*Some portion expended in previous years.

\*\*Anticipated bond; subject to decision of Board of Directors and voter approval.

**Improvements Not Adding Capacity (only projects estimated to be completed by 2025-26)**

Project	2020*	2019	2020	2021	2022	2025	Total Cost	Bond/ Local**	State Match	Impact Fees
<b>Elementary</b>										
Proposed Salem Woods Modernization					\$3.791	\$2.000	\$5.791	X	X	
Proposed Frank Wagner Modernization					\$15.791	\$12.000	\$27.021	X	X	
Proposed Chain Lake Elementary Expansion					\$14.628	\$10.000	\$24.628	X	X	
<b>Middle School</b>										
<b>High School</b>										
<b>District-wide</b>										
Improvements and Major Maintenance							\$4.0	X		

\*Some portion expended in previous years.

\*\*Anticipated bond; subject to decision of Board of Directors and voter approval. May also include other local voted or nonvoted capital funds.

## CAPACITY ANALYSIS

Table 11 evaluates the District’s capacity needs by comparing the District’s existing capacity, planned improvements, and projected enrollment. Portable capacity is not included in this analysis but can be used to provide interim capacity.

**Table 11  
Capacity Analysis (2020-2025)**

### Elementary School Surplus/Deficiency

	2019	2020	2021	2022	2023	2024	2025
Existing Capacity	3,036 <sup>^</sup>	3,036	3,036	3,036	3,036	3,036	3,036
Added Capacity							176 <sup>^^</sup>
Total Capacity	3,036	3,036	3,036	3,036	3,036	3,036	3,212
Enrollment	2,806 <sup>*</sup>	2,811	2,849	2,958	3,002	3,022	3,056
Surplus (Deficiency)	230	225	187	78	34	14	156

\*Actual adjusted enrollment in District facilities as of October 2019.

<sup>^</sup>Capacity additions at Salem Woods and Frank Wagner (2015 Bond, complete 2018).

<sup>^^</sup>Capacity additions at Salem Woods and Frank Wagner (Future Bond). Anticipated capacity additions at Chain Lake are not included at this time though may come on line in 2025 or shortly thereafter.

### Middle School Surplus/Deficiency

	2019	2020	2021	2022	2023	2024	2025
Existing Capacity	1,745 <sup>^</sup>	1,745	1,745	1,745	1,745	1,745	1,745
Added Capacity							
Total Capacity	1,745	1,745	1,745	1,745	1,745	1,745	1,745
Enrollment	1,460 <sup>*</sup>	1,490	1,433	1,373	1,350	1,384	1,426
Surplus (Deficiency)	285	255	312	372	395	361	319

\*Actual adjusted enrollment in District facilities as of October 2019.

<sup>^</sup>Capacity addition at Park Place Middle School (complete 2018); capacity addition at Hidden River Middle School (complete 2019-2020).

### High School Surplus/Deficiency

	2019	2020	2021	2022	2023	2024	2025
Existing Capacity	2,200 <sup>^</sup>	2,200	2,200	2,200	2,200	2,200	2,200
Added Capacity							
Total Capacity	2,200	2,200	2,200	2,200	2,200	2,200	2,200
Enrollment	1,817 <sup>*</sup>	1,803	1,841	1,870	1,859	1,854	1,779
Surplus (Deficiency)	383	397	359	330	341	346	421

\*Actual adjusted enrollment in District facilities as of October 2019.

<sup>^</sup>PE/Athletics improvements at Monroe High School (complete 2018).

See Chapter 4 for complete breakdown of enrollment projections.

See Table 9 for a comparison of additional capacity needs due to growth versus existing deficiencies.

## CHAPTER 7 – SCHOOL IMPACT FEES

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

### 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, as applicable, purchase land for school sites, make site improvements, construct schools, and purchase/install relocatable facilities that add interim capacity needed to serve new development.

A student factor (or student generation rate) is used to identify the average cost per dwelling unit by measuring the average number of students generated by each housing type (single family dwellings, multi-family dwellings of one bedroom or less, and multi-family dwellings of two bedrooms or more). The District obtained updated student factors in 2020. See Appendix B (including a description of the student factor methodology). The multi-family 2+ bedroom student factor analysis has, since 2016 and continuing in 2020, identified a high number of students being generated from multi-family 2+ bedroom units. This trend is particularly evident at the K-5 level where elementary students residing in new multi-family 2+ bedroom units notably exceeds the number of elementary students residing in new single family units. The District plans to continue to closely monitor this

trend.

As required by the GMA, credits are applied in the formula to account for State School Construction Assistance Funds (where expected) to be reimbursed to the District and projected future property taxes to be paid by the dwelling unit toward a capital levy/bond funding the capacity improvement. 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 9. Furthermore, impact fees will not be used to address existing deficiencies. See Table 10 for a complete identification of funding sources.

As required by the local ordinances, a 50% discount is applied to the calculated school impact fee. The District has applied an additional discretionary discount to the multi-family fee. This discretionary discount will be revisited in future updates to this CFP.

The following projects are included in the impact fee calculation:

- Future Bond capacity addition at Salem Woods Elementary School; and
- Future Bond capacity addition at Frank Wagner Elementary School.

Please see Table 10 and Table 12 for relevant cost data related to each capacity project and the variables used to calculate the impact fees.

**Table 12: Impact Fee Variables**

<b>Student Generation Factors – Single Family</b>		<b>Average Site Cost/Acre</b>	
Elementary	.213		N/A
Middle	.090		
Senior	.083		
<b>Total</b>	<b>.386</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>State Match Credit</b>	
		Current State Match Percentage	53.35%
<b>Student Generation Factors – Multi Family (2+ Bdrm)</b>		<b>Construction Cost Allocation</b>	
Elementary	.353	Current CCA	238.22
Middle	.147		
Senior	.167	<b>District Average Assessed Value</b>	
<b>Total</b>	<b>.667</b>	Single Family Residence	\$501,941
<b>Projected Student Capacity per Facility</b>		<b>District Average Assessed Value</b>	
Elementary (new addition – Salem Woods) - 88		Multi Family (1 Bedroom)	\$125,314
Elementary (new addition – Frank Wagner) - 88		Multi Family (2+ Bedroom)	\$178,051
<b>Required Site Acreage per Facility</b>		<b>SPI Square Footage per Student</b>	
<b>Facility Construction/Cost Average</b>		Elementary	90
Salem Woods (Addition)	\$6,743,852	Middle	108
Frank Wagner (Addition)	\$5,185,102	High	130
		<b>District Debt Service Tax Rate for Bonds</b>	
		Current/\$1,000	\$0.8986
<b>Permanent Facility Square Footage</b>		<b>General Obligation Bond Interest Rate</b>	
Elementary	310,369	Current Bond Buyer Index	2.44%
Middle	242,677		
Senior	245,122	<b>Developer Provided Sites/Facilities</b>	
<b>Total 96.99%</b>	<b>798,168</b>	Value	0
		Dwelling Units	0
<b>Temporary Facility Square Footage</b>			
Elementary	10,827		
Middle	6,370		
Senior	7,560		
<b>Total 3.01%</b>	<b>24,757</b>		
<b>Total Facility Square Footage</b>			
Elementary	321,196		
Middle	249,047		
Senior	255,862		
<b>Total 100.00%</b>	<b>822,925</b>		

**PROPOSED MONROE SCHOOL DISTRICT IMPACT FEE SCHEDULE**

Using the variables and formula described, impact fees proposed for the Monroe School District are summarized in Table 13. Refer to Appendix D for impact fee calculations.

**Table 13  
Monroe School District  
Proposed Impact Fee Schedule\***

Housing Type	Impact Fee Per Unit
Single-Family	\$3,803
Multi-Family (2+bedrooms)	\$7,638
Multi-Family (one bedroom/less)	\$0

*\*Table 10 reflects a 50% adjustment to the calculated fee as required by local ordinances and a District discretionary adjustment to the Multi-Family 2+bedroom fee. .*

## Appendix A

### District Modified Cohort Survival Enrollment Projections



# Medium Range Projection (Recommended)

## Projection (Medium Range)

Birth Year	<i>Projected Births</i>										
	<u>2015</u>	<u>2016</u>	<u>2017</u>	<u>2018</u>	<u>2019</u>	<u>2020</u>	<u>2021</u>	<u>2022</u>	<u>2023</u>	<u>2024</u>	<u>2025</u>
County Births	9,766	10,045	9,877	9,754	9,917	9,755	9,782	9,810	9838	9868	9909
Pct of Cohort	4.95%	4.73%	5.31%	4.98%	4.98%	4.99%	4.99%	4.99%	4.99%	4.99%	4.99%
City of Monroe Births	298	273	346	301	307	301	302	303	304	305	306

	<u>Oct-20</u>	<u>Oct-21</u>	<u>Oct-22</u>	<u>Oct-23</u>	<u>Oct-24</u>	<u>Oct-25</u>	<u>Oct-26</u>	<u>Oct-27</u>	<u>Oct-28</u>	<u>Oct-29</u>	<u>Oct-30</u>
<b>K</b>	484	475	525	486	494	487	488	490	491	493	495
<b>1</b>	485	514	505	557	516	526	518	520	521	523	524
<b>2</b>	493	475	504	495	547	506	516	508	510	511	513
<b>3</b>	461	489	471	499	490	542	502	511	504	505	507
<b>4</b>	431	460	488	471	499	490	542	502	512	504	506
<b>5</b>	458	436	466	494	476	505	496	549	508	518	510
<b>6</b>	486	455	433	462	490	473	502	493	546	505	515
<b>7</b>	486	478	448	426	455	484	466	495	487	538	498
<b>8</b>	518	500	492	461	438	469	498	480	509	501	554
<b>9</b>	462	521	502	494	463	441	472	501	483	512	504
<b>10</b>	508	466	525	506	498	467	445	476	505	488	517
<b>11</b>	417	443	406	458	441	435	408	388	415	441	425
<b>12</b>	<u>416</u>	<u>411</u>	<u>437</u>	<u>401</u>	<u>451</u>	<u>435</u>	<u>429</u>	<u>403</u>	<u>383</u>	<u>410</u>	<u>435</u>
<b>Total</b>	<b>6104</b>	<b>6123</b>	<b>6201</b>	<b>6210</b>	<b>6260</b>	<b>6261</b>	<b>6283</b>	<b>6316</b>	<b>6374</b>	<b>6449</b>	<b>6503</b>

*Numbers may not add to the exact total due to rounding.*

	21	18	78	9	50	0	22	33	58	74	54
	0.4%	0.3%	1.3%	0.1%	0.8%	0.0%	0.4%	0.5%	0.9%	1.2%	0.8%

### Enrollment by Level

<b>K-5</b>	2811	2849	2958	3002	3022	3056	3063	3080	3046	3054	3054
<b>6-8</b>	1490	1433	1373	1350	1384	1426	1466	1468	1541	1544	1567
<b>9-12</b>	1803	1841	1870	1859	1854	1779	1754	1768	1787	1851	1881

## Appendix B

### 2020 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**

4/16/20

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 2012 through December 2018. 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 April 2020. 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 769 single family detached units were compared with data on 6,257 students registered in the District, and the following matches were found by grade level(s)\*:

GRADE(S)	COUNT OF MATCHES	CALCULATED RATE
K	30	0.039
1	22	0.029
2	35	0.046
3	24	0.031
4	26	0.034
5	27	0.035
6	25	0.033
7	25	0.033
8	19	0.025
9	13	0.017
10	18	0.023
11	12	0.016
12	21	0.027
K-5	164	0.213
6-8	69	0.090
9-12	64	0.083
K-12	297	0.386

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 102 multi-family 2+ BR units were compared with data on 6,257 students registered in the District, and the following matches were found by grade level(s)\*:

GRADE(S)	COUNT OF MATCHES	CALCULATED RATE
K	8	0.078
1	5	0.049
2	4	0.039
3	8	0.078
4	4	0.039
5	7	0.069
6	7	0.069
7	4	0.039
8	4	0.039
9	8	0.078
10	3	0.029
11	3	0.029
12	3	0.029
K-5	36	0.353
6-8	15	0.147
9-12	17	0.167
K-12	68	0.667

6. **Multi-Family 0-1 BR Rates:** Research indicated that 4 multi-family 0-1 BR units were constructed within District boundaries during the time period covered by this study. No specific unit matches were made.

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

	K-5	6-8	9-12	K-12
Single Family	.213	.090	.083	.386
Multi-Family 2+ BR	.353	.147	.167	.667

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

## Appendix D

### Impact Fee Calculation

**School Impact Fee Calculation - Single Family Dwelling Unit**  
**Monroe School District 2020 CFP**

School Site Acquisition Cost:

	<u>Site Size Acreage</u>	<u>Cost/ Acre</u>	<u>Facility Size</u>	<u>Site Cost/ Student</u>	<u>Student Factor</u>	<u>Cost/ SFDU</u>
Elementary	10	\$0	550	\$0	0.2130	\$0
Middle	20	\$0	850	\$0	0.0900	\$0
Senior	40	\$0	1600	\$0	0.0830	\$0
TOTAL						\$0

School Construction Cost:

	<u>Sq. Ft. % Permanent</u>	<u>Facility Cost</u>	<u>Facility Size</u>	<u>Bldg. Cost/ Student</u>	<u>Student Factor</u>	<u>Cost/ SFDU</u>
Elementary	96.99%	\$11,928,954	176	\$67,778	0.2130	\$14,002
Middle	96.99%	\$0	850	\$0	0.0900	\$0
Senior	96.99%	\$0	1600	\$0	0.0830	\$0
TOTAL						\$14,002

Temporary Facility Cost:

	<u>Sq. Ft. % Temporary</u>	<u>Facility Cost</u>	<u>Facility Size</u>	<u>Bldg. Cost/ Student</u>	<u>Student Factor</u>	<u>Cost/ SFDU</u>
Elementary	3.01%	\$0	25	\$0	0.2130	\$0
Middle	3.01%	\$0	25	\$0	0.0900	\$0
Senior	3.01%	\$0	25	\$0	0.0830	\$0
TOTAL						\$0

State School Construction Funding Assistance Credit:

	<u>Const Cost Allocation</u>	<u>OSPI Sq. Ft./ Student</u>	<u>Funding Assistance</u>	<u>Credit/ Student</u>	<u>Student Factor</u>	<u>Cost/ SFDU</u>
Elementary	238.22	90.0	53.35%	\$11,438	0.2130	\$2,436
Middle	238.22	108.0	0.00%	\$0	0.0900	\$0
Senior	238.22	130.0	0.00%	\$0	0.0830	\$0
TOTAL						\$2,436

## School Impact Fee Calculation - Single Family Dwelling Unit

Monroe School District 2020 CFP

### Tax Payment Credit Calculation:

Average SFR Assessed Value	\$501,941
Current Capital Levy Rate/\$1000	\$0.90
Annual Tax Payment	\$451.04
Years Amortized	10
Current Bond Interest Rate	2.44%
Present Value of Revenue Stream	\$3,960

### Impact Fee Summary - Single Family Dwelling Unit:

Site Acquisition Cost	\$0
Permanent Facility Cost	\$14,002
Temporary Facility Cost	\$0
State SCFA Credit	(\$2,436)
Tax Payment Credit	(\$3,960)
Unfunded Need	\$7,606
50% Required Adjustment	\$3,803
<b>Single Family Impact Fee</b>	<b>\$3,803</b>



**School Impact Fee Calculation - Multi-Family 2+ Dwelling Unit**  
**Monroe School District 2020 CFP**

School Site Acquisition Cost:

	<u>Site Size</u> <u>Acreage</u>	<u>Cost/</u> <u>Acre</u>	<u>Facility</u> <u>Size</u>	<u>Site Cost/</u> <u>Student</u>	<u>Student</u> <u>Factor</u>	<u>Cost/</u> <u>MFDU</u>
Elementary	10	\$0	550	\$0	0.3530	\$0
Middle	20	\$0	850	\$0	0.1470	\$0
Senior	40	\$0	1600	\$0	0.1670	\$0
TOTAL						\$0

School Construction Cost:

	<u>Sq. Ft. %</u> <u>Permanent</u>	<u>Facility</u> <u>Cost</u>	<u>Facility</u> <u>Size</u>	<u>Bldg. Cost/</u> <u>Student</u>	<u>Student</u> <u>Factor</u>	<u>Cost/</u> <u>MFDU</u>
Elementary	96.99%	\$11,928,954	176	\$67,778	0.3530	\$23,206
Middle	96.99%	\$0	850	\$0	0.1470	\$0
Senior	96.99%	\$0	1600	\$0	0.1670	\$0
TOTAL						\$23,206

Temporary Facility Cost:

	<u>Sq. Ft. %</u> <u>Temporary</u>	<u>Facility</u> <u>Cost</u>	<u>Facility</u> <u>Size</u>	<u>Bldg. Cost/</u> <u>Student</u>	<u>Student</u> <u>Factor</u>	<u>Cost/</u> <u>MFDU</u>
Elementary	3.01%	\$0	25	\$0	0.3530	\$0
Middle	3.01%	\$0	25	\$0	0.1470	\$0
Senior	3.01%	\$0	25	\$0	0.1670	\$0
TOTAL						\$0

State School Construction Funding Assistance Credit:

	<u>Const Cost</u> <u>Allocation</u>	<u>OSPI Sq. Ft./</u> <u>Student</u>	<u>Funding</u> <u>Assistance</u>	<u>Credit/</u> <u>Student</u>	<u>Student</u> <u>Factor</u>	<u>Cost/</u> <u>MFDU</u>
Elementary	238.22	90.0	53.35%	\$11,438	0.3530	\$4,038
Middle	238.22	108.0	0.00%	\$0	0.1470	\$0
Senior	238.22	130.0	0.00%	\$0	0.1670	\$0
TOTAL						\$4,038

**School Impact Fee Calculation - Multi-Family 2+ Dwelling Unit**  
**Monroe School District 2020 CFP**

Tax Payment Credit Calculation:

Average MFR Assessed Value	\$178,051
Current Capital Levy Rate/\$1000	\$0.90
Annual Tax Payment	\$160.00
Years Amortized	10
Current Bond Interest Rate	2.44%
Present Value of Revenue Stream	\$1,405

Impact Fee Summary - Multi-Family Dwelling Unit:

Site Acquisition Cost	\$0
Permanent Facility Cost	\$23,206
Temporary Facility Cost	\$0
State SCFA Credit	(\$4,038)
Tax Payment Credit	(\$1,405)
Unfunded Need	\$17,763
50% Required Adjustment	\$8,882
District Discretionary Adjustment	\$7,638
Multi-Family Impact Fee	\$7,638



**Mukilteo**  
School District

## **MUKILTEO SCHOOL DISTRICT NO. 6**

### **CAPITAL FACILITIES PLAN 2020 – 2025**

#### **BOARD OF DIRECTORS**

John Gahagan  
Kyle Kennedy  
Shaun Olsen  
Judy Schwab  
Michael Simmons

#### **SUPERINTENDENT**

Dr. Alison Brynelson

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

**Board Approved: July 13, 2020**

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## SECTION 1 - INTRODUCTION

### Purpose of the Capital Facilities Plan

The Washington State Growth Management Act (GMA) outlines 13 broad goals including the adequate provision of necessary public facilities and services. Public Schools are among these necessary facilities and services. Public school districts adopt 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 (District) has prepared this six-year Capital Facilities Plan (CFP) in accordance with the Washington State Growth Management Act and the codes of Snohomish County, City of Mukilteo, and City of Everett. This CFP is intended to provide these jurisdictions with a description of projected student enrollment and school capacities at established levels of service over the six-year period, 2020-2025.

The District prepared its original CFP in 1994 based on the criteria set forth in the GMA. 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. 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 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 trends. Student generation rates must be independently calculated by each school district.
- The CFP must comply with RCW Chapter 36.70A (the Growth Management Act).
- The methodology used to calculate impact fees must comply with RCW Chapter 82.02. In the event that impact fees are not available due to action by the state, county, or cities within the District, future CFP's would identify alternative funding sources.

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.

Snohomish County's Countywide Planning Policies direct jurisdictions in Snohomish County to "ensure the availability of sufficient land and services for future K-20 school needs." Policy ED-11. The District appreciates any opportunity for cooperative planning efforts with its jurisdictions.

### **Overview of the Mukilteo School District**

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

The District serves a student population of 15,289 (October 2019) with one kindergarten center, twelve elementary schools (grades K-5), four middle schools (grades 6-8), two comprehensive high schools (grades 9-12), and one small choice high school (grades 10-12). 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 as the Skills Center is a regional career and technical education partnership serving students from 14 different school districts and does not have space that can be utilized by Mukilteo School District for its traditional K-12 education purposes.

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

- Capacity needs during the six-year period of the plan at the elementary and high school grade spans.
- Uneven growth rates between geographic sectors within the District. These uneven growth patterns result in some schools reaching maximum capacity sooner than others and this will increase the difficulty of maintaining stable school service area boundaries. The District will need to continue to transfer students from higher population areas to schools with capacity until new facilities are built to absorb growth.

These issues are addressed in greater detail in this CFP.

## SECTION 2 - DISTRICT EDUCATIONAL PROGRAM STANDARDS

### Primary Objective

To best optimize student learning, Mukilteo School District establishes a service standard for classroom capacity utilization. This requires a constant review and assessment of curriculum and instructional changes, student learning behaviors, learning environments, technological innovations and program development. Additional variables include changes in mandatory requirements issued by the state such as the implementation of full day kindergarten, Core 24 graduation requirements, and reduction in class size ratios. These elements as well as demographic projections are weighed when determining service levels. School facility and student capacity needs are determined 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). These elements, as well as demographic projections, are weighed when determining standard of service levels.

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/performing arts programs. These programs can have a significant impact on the available student capacity of school facilities.

### District Educational Program Standards.

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)	Performing Arts
Summer School	Health & Fitness
Highly Capable Program (grades 3-8)	Science Labs
English as a Second Language (ESL)	OT/PT
English Language Learner (ELL)	Career Centers (High School)
World Languages	Student Stores (High School)
Community-Based Transition Program	Learning Assistance Programs (LAP)
ECEAP	Mukilteo Behavioral Support Center
Music Programs	Career and Technical Education
Computer & Technology Labs	College in the High School
Title 1 Support	Opportunity Day School

The above programs affect the capacity of some of the buildings housing these programs. Special programs usually require space modifications and frequently require lower class sizes than other, more traditional programs; this affects available school capacity as it results in greater space requirements. These requirements affect the utilization of rooms and result in school capacities varying from year to year (as programs move or grow, depending on space needs, capacity can change or decline in a school).

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 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**

- Planning class size for Kindergarten is 21 students per classroom
- Class size for Kindergarten cannot exceed 25 students
- Planning class size for grades 1-3 is 22 and grades 4 and 5 is 23 students per classroom
- Class size for grades 1-5 cannot exceed 30 students
- Special Education for some students is provided in self-contained classroom at 12 students or less per classroom
- Music and physical education instruction will be provided in a separate classroom
- Schools should have a room dedicated as a computer lab
- 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%

**Educational Program Planning 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 high school 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. The minimum level of service is not the District’s desired level for providing education. At current program offerings and within existing permanent and portable facilities, the District’s minimum level of service is:

Grade Level	# of Scheduled Teaching Stations	Min. Level of Service	2017-18 Level of Service	2018-19 Level of Service
K-5	313	25	23.0	22.9
6-8	166	30	21.9	22.5
9-12	161	33	26.9	27.6



### **SECTION 3 - CAPITAL FACILITIES INVENTORY**

Under the GMA, a public entity must periodically determine its capacity by conducting an inventory of its capital facilities. Table 3.1 summarizes the permanent facility capacity owned and operated by the District. Information is also provided on relocatable classrooms (portables), school sites and other district owned facilities or land.

School facility capacity was inventoried based on the space required to accommodate the District's adopted educational program standards.

#### **Schools**

The District operates a kindergarten center, twelve elementary schools, four middle schools, two comprehensive high schools, a small choice 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; ACES high school and the Sno-Isle Skills Center serve grades 10-12.

School capacity is determined based on the number of classrooms within each building and the space requirements of the District's currently adopted educational program. It is the capacity calculation that is used to establish the District's baseline capacity, and to determine future capacity needs based on projected student enrollment.

The Sno-Isle Skills Center is not included in capacity calculations or student enrollment projections for the purposes of capital facilities planning within the District. The Skills Center is a regional career and technical education partnership serving students from 14 different school districts and does not have space that can be utilized by Mukilteo School District for its traditional K-12 education purposes. 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 school capacity calculations provided in Table 3.1.

Capacities will change from year-to-year based on changes to existing instructional programs, projected future programs and the resulting required space needed to deliver the instructional model at each specific site. Capacity takes into consideration the specific programs that actually take place in each of the rooms and the required service levels previously listed. Because of the need to provide planning time and space for teacher preparation or other required services, some facilities will only support a capacity utilization of 85%. Capacities are updated in each CFP to reflect current program needs and classroom utilization.

***Table 3.1 – Permanent Facility Inventory***

School	Site Size (Acres)	Bldg Area (Sq. Feet)	Year Built/ Modernized	Permanent Capacity
Challenger	10	50,022	1987	464
Columbia	9.6	65,219	1989	486
Discovery	9.3	42,708	1988/2017	442
Endeavour	9.4	53,376	1994	376
Fairmount	15	66,189	1952/1999	520
Horizon	19	56,162	1989	550
Lake Stickney	9.8	77,542	2016	638
Mukilteo	9.8	41,727	1981	352
Odyssey	10.9	62,127	2003	572
Olivia Park	9.5	49,881	1956/1992	528
Pathfinder*		62,700	2017	506
Picnic Point	10	39,271	1981	376
Serene Lake	10	49,230	1969/1994	396
<b>Total K-5</b>		<b>716,154</b>		<b>6,206</b>
Explorer	29.5	129,539	1972/2005	941
Harbour Pointe	17.8	110,400	1993	880
Olympic View	25.2	114,541	1955/2017	951
Voyager	16	106,954	1992	881
<b>Total 6-8</b>		<b>461,434</b>		<b>3,652</b>
ACES	5.8	19,833	1985/1997	0
Kamiak	60.7	255,478	1993/2002	1,675
Mariner	37.1	276,668	1971/2003	1,964
<b>Total 9-12</b>		<b>551,979</b>		<b>3,639</b>

\*Shared site, acreage included in Fairmount Elementary

\*\*ACES capacity is entirely in relocatable classrooms not considered permanent capacity.

### Relocatable Classrooms (Portables)

Relocatable classrooms (portables) provide interim classroom space to house students until funding can be secured to construct permanent classrooms. The District currently uses 115 relocatable classrooms at various school sites throughout the District to provide additional interim capacity. Current use of relocatable classrooms throughout the District is summarized in Table 3.2.

**Table 3.2 – 2019-20 Portable Classroom Inventory**

School	Classroom Portables	Interim Capacity
Challenger	11	154
Columbia	0	0
Discovery	14	264
Endeavour	6	88
Fairmount	4	22
Horizon	7	154
Lake Stickney	0	0
Mukilteo	10	156
Odyssey	4	56
Olivia Park	3	22
Pathfinder	0	0
Picnic Point	6	66
Serene Lake	4	22
<b>Subtotal K-5</b>	<b>69</b>	<b>1,004</b>
Explorer	4	64
Harbour Pointe	1	21
Olympic View	0	0
Voyager	0	0
<b>Subtotal 6-8</b>	<b>5</b>	<b>85</b>
ACES	13	200
Kamiak	16	316
Mariner	12	371
<b>Subtotal 9-12</b>	<b>41</b>	<b>887</b>
<b>TOTAL K-12</b>	<b>115</b>	<b>1,976</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.*

### Schools Closed to Out of District Transfers

Schools continue to add capacity when portable classrooms are added and/or computer labs and other flexible spaces are converted to classroom spaces. However, this practice is not a long-term solution for capacity needs because the core facilities of the building do not support the additional enrollment. Therefore, the District calculates capacity for out-of-district transfers at the lesser of:

- The sum of permanent capacity and portable capacity, or
- 700 students for elementary schools; 825 students for middle schools; and 1,900 students for high schools.

In addition, any school that transfers kindergarten students to Pathfinder Kindergarten Center to provide space for first-through-fifth grade instruction is determined to be over capacity for the purposes of out-of-district transfers.

### 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 below:

**Table 3.3 – Support Facility Inventory**

<b>Facility</b>	<b>Address</b>	<b>Building Area (Square Feet)</b>	<b>Site Size (Acres)</b>
Administration	9401 Sharon Dr., Everett	26,608	9.15
Grounds/Maintenance	525 W. Casino Rd., Everett	22,800	4.0
Service Center	8925 Airport Rd., Everett	37,677	10.0

**Table 3.4 – Other Facility Inventory**

<b>Facility</b>	<b>Address</b>	<b>Building Area (Square Feet)</b>	<b>Site Size (Acres)</b>
Sno-Isle Skills Center	9001 Airport Rd., Everett	74,024	15.0

## **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.

## SECTION 4 - STUDENT ENROLLMENT PROJECTIONS

### Projected Student Enrollment 2020-2025

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.

The District has contracted with a consultant to develop a methodology for enrollment projections. The consultant has a thirty year history of working with local school districts in projecting enrollment and demographics, including seven years as the demographer for the Seattle Public Schools and twenty-two years as an independent consultant providing long-range projections for a number of school districts including; Bellevue, Bethel, Bremerton, Edmonds, Everett, Federal Way, Highline, Monroe, Northshore, Olympia, Puyallup, Seattle, Tacoma, Tukwila, South Kitsap, and Mukilteo. 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 second grade is compared to the previous year's first grade enrollment. The ratio of these two numbers (second grade enrollment divided by first grade enrollment) creates a "cohort survival 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 except kindergarten where there is no prior year's enrollment to use for comparison. At the kindergarten level, enrollment is compared to the county births 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 over the past seven years from a high of 12.6% to a low of 12.1%. Future forecasts assume that the District will enroll over 12% of the County births.

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.

Despite these advantages, cohort survival can produce large forecast errors because it does not consider possible changes in demographic trends. New housing, especially, 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 and housing growth will dampen enrollment gains. Changes in the housing market between 2007 and 2011 and the accompanying recession, for example, caused many districts to see a decline in their enrollment during that time period.

For the Mukilteo School District forecast, the demographer combines the cohort survival method with information about market share gains and losses from private schools, information about population growth from 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.

Table 4.1 shows the enrollment forecast that combines cohort survival methodology with information about new housing development and the “birth-to-k” ratio methodology mentioned above (the “Modified Cohort Survival Projections”). This model results in District enrollment reaching 15,828 by 2025. Because of the known information regarding new development in the pipeline and associated growth, as well as the length of time it takes to initiate new school construction projects to address growth, this plan uses the projections in Table 4.1 to determine facility needs during the six-year time frame of the Capital Facilities Plan.

**Table 4.1 – Modified Cohort Enrollment Projections** (including housing permit data and birth rate data)

Grade	Actual 2019	Projections					
		2020	2021	2022	2023	2024	2025
K	1,184	1,215	1,256	1,235	1,219	1,240	1,220
1	1,188	1,195	1,227	1,281	1,266	1,250	1,271
2	1,185	1,189	1,199	1,232	1,289	1,271	1,258
3	1,163	1,191	1,197	1,210	1,247	1,302	1,286
4	1,158	1,170	1,200	1,206	1,222	1,256	1,314
5	1,224	1,162	1,176	1,205	1,214	1,227	1,264
6	1,228	1,193	1,135	1,152	1,182	1,188	1,203
7	1,292	1,240	1,207	1,149	1,169	1,198	1,206
8	1,168	1,285	1,237	1,209	1,153	1,170	1,201
9	1,181	1,177	1,298	1,245	1,219	1,160	1,180
10	1,245	1,175	1,174	1,294	1,244	1,215	1,159
11	1,064	1,131	1,076	1,081	1,194	1,146	1,122
12	1,009	1,039	1,112	1,071	1,079	1,190	1,144
<b>Total K-5</b>	<b>7,102</b>	<b>7,122</b>	<b>7,255</b>	<b>7,369</b>	<b>7,457</b>	<b>7,546</b>	<b>7,613</b>
<b>Total 6-8</b>	<b>3,688</b>	<b>3,718</b>	<b>3,579</b>	<b>3,510</b>	<b>3,504</b>	<b>3,556</b>	<b>3,610</b>
<b>Total 9-12</b>	<b>4,499</b>	<b>4,522</b>	<b>4,660</b>	<b>4,691</b>	<b>4,736</b>	<b>4,711</b>	<b>4,605</b>
<b>District Total</b>	<b>15,289</b>	<b>15,362</b>	<b>15,494</b>	<b>15,570</b>	<b>15,697</b>	<b>15,813</b>	<b>15,828</b>

### Snohomish County/OFM Projections

Another projection, based on Office of Financial Management (OFM) population projections for Snohomish County, was also produced. Using the OFM/County data for the years 2000 through 2019 and the District’s corresponding actual enrollment, the District’s enrollment averaged 2% of the OFM/County Population estimates. Further, District enrollment averaged 15.38% of the OFM/County population residing within Mukilteo School District boundaries. Assuming that these average percentages remain constant, the District’s enrollment would grow as shown in Table 4.2.

**Table 4.2 – Projected Enrollment - 2035 OFM Estimates\***

Grade Level	Actual 2019	% MSD Population		% County Population	
		2025	2035	2025	2035
<b>Elementary</b>	7,102	7,863	8,033	8,237	9,045
<b>Middle School</b>	3,688	3,854	3,937	4,037	4,433
<b>High School</b>	4,499	4,879	4,984	5,111	5,613
<b>Total</b>	<b>15,289</b>	<b>16,596</b>	<b>16,955</b>	<b>17,386</b>	<b>19,091</b>

\*Assumes that percentage per grade span will remain constant through 2035.

Note: Snohomish County Planning and Development Services provided the underlying data for the 2035 projections.

For the purposes of this Capital Facilities Plan, the District relies on the Modified Cohort Survival Projections as this projection provides a more detailed grade-specific projection which, when combined with district-specific new housing development trends, allows for better planning across the six-year period.

## SECTION 5 - CAPITAL FACILITIES NEEDS

Projected available student capacity is derived by subtracting projected student enrollment from existing student capacity (excluding relocatable classrooms) for each of the six years in the forecast period (2020-2025). A long-term projection of un-housed students and facilities needs is shown in Table 5.1. On February 11, 2020 voters approved a six-year, \$240 million capital bond. Planned new capacity improvements included in that bond are represented below, through 2025. The District considers relocatable (portable) classrooms to be temporary/interim space and bases its new capital facilities needs from permanent capacity. (Information on relocatable classrooms and interim capacity can be found in Table 3.2.) However, relocatable classrooms are a part of the District's interim capacity solution. Table 5.1 does not include relocatable classrooms that may be added or adjusted during the six-year planning period.

**TABLE 5.1 – School Enrollment & Classroom Capacity Needs**

	2019-20	2020-21	2021-22	2022-23	2023-24	2024-25	2025-26
<b>Elementary Enrollment</b>	7,102	7,122	7,255	7,369	7,457	7,546	7,613
Permanent Capacity - Existing	6,206	6,206	6,206	6,206	6,506	6,606	6,706
New Permanent Capacity				300	100	100	100
Interim Capacity (Portables)	1,004	1,004	1,004	1,004	1,004	1,004	1,004
TOTAL Capacity incl. Interim	7,210	7,210	7,210	7,510	7,610	7,710	7,810
<b>Permanent Capacity over/(short)</b>	<b>(896)</b>	<b>(916)</b>	<b>(1,049)</b>	<b>(1,163)</b>	<b>(951)</b>	<b>(840)</b>	<b>(907)</b>
<b>Total Capacity (w/portables)</b>	<b>108</b>	<b>88</b>	<b>(45)</b>	<b>141</b>	<b>153</b>	<b>164</b>	<b>197</b>
<b>Middle School Enrollment</b>	3,688	3,718	3,579	3,510	3,504	3,556	3,610
Permanent Capacity - Existing	3,652	3,652	3,652	3,652	3,652	3,652	3,652
New Permanent Capacity							
Interim Capacity (Portables)	85	85	85	85	85	85	85
TOTAL Capacity incl. Interim	3,737	3,737	3,737	3,737	3,737	3,737	3,737
<b>Permanent Capacity over/(short)</b>	<b>(36)</b>	<b>(66)</b>	<b>73</b>	<b>142</b>	<b>148</b>	<b>96</b>	<b>42</b>
<b>Total Capacity (w/portables)</b>	<b>49</b>	<b>19</b>	<b>158</b>	<b>227</b>	<b>233</b>	<b>181</b>	<b>127</b>
<b>High School Enrollment</b>	4,499	4,522	4,660	4,691	4,736	4,711	4,605
Permanent Capacity - Existing	3,639	3,639	3,639	3,639	3,639	3,639	3,774
New Permanent Capacity						135	
Interim Capacity (Portables)	887	887	887	887	887	887	887
TOTAL Capacity incl. Interim	4,526	4,526	4,526	4,526	4,526	4,661	4,661
<b>Permanent Capacity over/(short)</b>	<b>(860)</b>	<b>(883)</b>	<b>(1,021)</b>	<b>(1,052)</b>	<b>(1,097)</b>	<b>(1,072)</b>	<b>(831)</b>
<b>Total Capacity (w/portables)</b>	<b>27</b>	<b>4</b>	<b>(134)</b>	<b>(165)</b>	<b>(210)</b>	<b>(50)</b>	<b>56</b>
<b>TOTAL ENROLLMENT</b>	15,289	15,362	15,494	15,570	15,697	15,813	15,828
Total Permanent	13,497	13,497	13,497	13,497	13,797	13,897	14,132
Total New Permanent				300	100	235	100
Interim Capacity	1,976	1,976	1,976	1,976	1,976	1,976	1,976
TOTAL Capacity incl. Interim	15,473	15,473	15,473	15,773	15,873	16,108	16,208
<b>Permanent Capacity over/(short)</b>	<b>(1,792)</b>	<b>(1,865)</b>	<b>(1,997)</b>	<b>(1,773)</b>	<b>(1,800)</b>	<b>(1,681)</b>	<b>(1,596)</b>
<b>Total Capacity (w/portables)</b>	<b>184</b>	<b>111</b>	<b>(21)</b>	<b>203</b>	<b>176</b>	<b>295</b>	<b>380</b>

## SECTION 6 – SIX-YEAR FINANCING PLAN

### Planned Improvements

In the event that planned construction projects do not fully address space needs for student growth and a reduction in interim student housing, or that voter approved funding could not be secured, 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-year calendar

The six-year financing plan includes projects adding elementary and high school classroom capacity. In addition, the District may continue to add and use portable classrooms as part of the capacity solution. It is anticipated that additional interim capacity via portable classrooms will be needed until additional permanent capacity beyond what was included in the voter approved February 2020 capital bond measure can be determined.

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

### Financing for Planned Improvements

#### *General Obligation Bonds*

Bonds are typically used to fund construction of new schools and other capital improvement projects. A 60% voter approval is required to approve the issuance of bonds. Bonds are then retired through collection of property taxes.

#### *Capital Projects Levy*

The District has passed a six-year capital projects levy that runs through 2022. Capital project levy dollars will be dedicated to additional modernization and major system upgrades or modernization of buildings and grounds.

#### *State School Construction Assistance Program (SCAP)*

State School Construction Assistance Program (SCAP) funds come from the Common School Construction Fund. Bonds are sold on behalf of the fund, and then retired from revenues accruing predominantly from the sale of renewable resources (i.e., timber) from State school lands set aside by the Enabling Act of 1889. If these sources are insufficient to meet needs, the Legislature can appropriate funds or the Superintendent of Public Instruction can prioritize projects for funding.

School districts may qualify for SCAP funds for specific capital projects based on a qualification and criterion system. The District is currently eligible for SCAP 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 costs of construction and each district has a different matching ratio based on the state's formula. Because SCAP funds are received at the end of a project, it is necessary for school districts to plan to



finance the complete project with local funds. Site acquisition and site improvements are not eligible to receive matching funds.

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

The 2015 Washington State Legislature provided limited funding for the construction of elementary classrooms to assist in the effort to provide space for full day kindergarten and to lower class sizes in K-3 grades. The District applied for this grant and a 24 classroom need was determined, but grant funds were not awarded.

### *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.

The six-year financing plan shown on Table 6.1 demonstrates how the District intends to fund new construction and improvements to school facilities for the years 2020-2025. The financing components include a capital projects levy, funds from a voter approved capital bond measure in February 2020, impact fees and SCAP (“state match”) funds.

**Table 6.1 – Six-Year Financing Plan – estimated** (costs in millions)

PROJECTS ADDING CAPACITY	2019	ANTICIPATED YEAR						Total Cost	POTENTIAL FUNDING SOURCE		
		2020	2021	2022	2023	2024	2025		Bonds/ Levy	SCAP (State)	Impact Fees
Discovery Elementary Addition		1.5	12.8	14.5	1.1	0.1		30.0	X		X
Challenger Elementary Addition			0.2	0.7	4.3	9.5	0.3	15.0	X		X
Horizon Elementary Addition			0.8	6.4	7.6	0.2		15.0	X		X
Mariner H.S. Addition			1.2	3.0	7.7	12.3	0.8	25.0	X		X
Explorer M.S. Replacement (Ph1)			0.1	0.7	2.0	10.0	16.5	29.3	X	X	
Serene Lake E.S Replacement (Ph1)				0.1	1.1	6.7	11.7	19.6	X	X	X
Mukilteo E.S. Replacement (Ph1)				0.5	1.0	8.5	14.2	24.2	X	X	X
Interim (portable) Capacity	0.1	1.3	1	.5				3.8	X		X
<b>TOTAL CAPACITY PROJECTS</b>	<b>0.1</b>	<b>2.8</b>	<b>16.1</b>	<b>26.4</b>	<b>24.8</b>	<b>47.3</b>	<b>43.5</b>	<b>161.0</b>			

PROJECTS NOT ADDING CAPACITY	2019	ANTICIPATED YEAR						Total Cost	POTENTIAL FUNDING SOURCE		
		2020	2021	2022	2023	2024	2025		Bonds/ Levy	SCAP (State)	Impact Fees
MA Women’s Locker room	1.3 <sup>1</sup>	0.3						1.6	X	X	
Districtwide Security Improvements		0.4	1.5	7.2	2.1	1.1		12.3	X		
Districtwide Field Improvements			7.1	5.3	0.5	0.2	0.2	13.3	X		
Performing Arts Center Improvements			4.3	5.6	0.1			10.0	X		
Facility System Improvements		4.6	12.3	20.6	3.0	0.1	1.6	42.2	X		
<b>TOTAL Non-CAPACITY PROJ.</b>	<b>1.3<sup>1</sup></b>	<b>5.3</b>	<b>25.2</b>	<b>38.7</b>	<b>5.7</b>	<b>1.4</b>	<b>1.8</b>	<b>79.4</b>			

<sup>1</sup>Does not include project expenditures from prior years

## SECTION 7 - SCHOOL IMPACT FEES

The Washington State Growth Management Act (GMA) authorizes cities and counties that plan under RCW 36.70A.040 to collect impact fees to supplement funding of additional system improvements (e.g., public facilities including schools) needed to accommodate growth from 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**

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 reflect projected costs in the six-year financing plan.
- Data in the proposed impact fee schedule must reflect expected student generation rates from the following residential unit types:
  1. single family
  2. multi-family/1-bedroom or less; and
  3. multi-family/2-bedroom or more.

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

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

Impact fees have been calculated utilizing the formula in the Snohomish County Impact Fee Ordinance (SCC 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 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 SCAP ("state match") funds to be reimbursed to the District and for projected future property taxes to be paid by the dwelling unit.

#### ***Site Acquisition Cost Element***

1. Site Size – Acreage needed to accommodate each planned project.
2. Average Land Cost Per Acre – based on current estimates of land costs within the District.
3. Facility Design Capacity – number of students each planned project is designed to accommodate.
4. Student Factor – Number of students generated by each housing type – in this case, single family dwellings and multi-family dwellings. A student generation rate study was conducted to determine the updated generation rate for this CFP. See Appendix A for the study information. Current student generation rates for the district are shown below:

**Table 7.1 – Student Generation Rates\***

<b>Grade Span</b>	<b>Single Family</b>	<b>Multi-Family (1bdm/less)</b>	<b>Multi-Family (2+bedroom)</b>
Elementary (K-5)	.248	.000	.342
Middle School (6-8)	.102	.000	.133
High School (9-12)	.096	.000	.143
<b>Total (K-12)</b>	<b>.446</b>	<b>.000</b>	<b>.619</b>

\*Full study info included in Appendices

**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. Facility construction costs also include the off-site development costs. Costs vary with each site and may include such items as sewer line extension, 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 needed to serve growth on an interim basis. The cost allocated to new development must be growth related and must be in proportion to the current permanent and interim space ratios in 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.

**School Construction Assistance Credit Variables**

1. Construction Cost Allocation – Currently \$238.22 for new construction projects approved in July of 2020.
2. State Funding Assistance Percentage – Percentage of School Construction Assistance Program funds from the state that the District expects to receive. For new construction and additions, the District is currently eligible to receive a maximum state match of 49.21% of *eligible* costs (as defined by the state).

**Tax Credit Variables**

1. Interest Rate (20-year General Obligation Bond) – interest rate of return on a 20-year General Obligation Bond derived from the Bond Buyer index. Because of current market volatility, the District is using the February 2020 average interest rate of 2.44%
2. Bond Levy Rate – The current bond levy rate is \$.89 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 County Assessor’s files. The current average assessed value is \$529,572 for single family dwelling units; \$160,556 for one-bedroom multi-family dwelling units; and \$228,123 for two or more bedroom multi-family dwelling units.

**Proposed Mukilteo School District Impact Fee Schedule**

Using the variables and formula described, impact fees proposed for the District are summarized below. See Appendix B for the impact fee calculation detail.

**Table 7.2 – School Impact Fees\***

<u>Housing Type</u>	<u>Impact Fee Per Unit</u>
Single Family	\$5,048
Multi-Family (1 bedroom or less)	\$0
Multi-Family (2+ bedroom)	\$8,924

*\*Table 7.2 reflects a 50% adjustment to the calculated fee as required by local ordinances.*

**APPENDIX A**  
**STUDENT GENERATION RATE STUDY**



**Student Generation Rate Study**  
**for the**  
**Mukilteo School District**  
4/16/2020

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 2012 through December 2018. 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 April 2020. 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 1,260 single family detached units were compared with data on 16,103 students registered in the District, and the following matches were found by grade level(s)\*:

GRADE(S)	COUNT OF MATCHES	CALCULATED RATE
K	44	0.035
1	56	0.044
2	65	0.052
3	54	0.043
4	51	0.040
5	43	0.034
6	39	0.031
7	50	0.040
8	39	0.031
9	35	0.028
10	36	0.029
11	21	0.017
12	29	0.023
K-5	313	0.248
6-8	128	0.102
9-12	121	0.096
K-12	562	0.446

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 894 multi-family 2+ BR units were compared with data on 16,103 students registered in the District, and the following matches were found by grade level(s)\*:

GRADE(S)	COUNT OF MATCHES	CALCULATED RATE
<b>K</b>	47	0.053
<b>1</b>	48	0.054
<b>2</b>	49	0.055
<b>3</b>	52	0.058
<b>4</b>	51	0.057
<b>5</b>	59	0.066
<b>6</b>	36	0.040
<b>7</b>	40	0.045
<b>8</b>	43	0.048
<b>9</b>	39	0.044
<b>10</b>	31	0.035
<b>11</b>	33	0.037
<b>12</b>	25	0.028
<b>K-5</b>	306	0.342
<b>6-8</b>	119	0.133
<b>9-12</b>	128	0.143
<b>K-12</b>	553	0.619

6. **Multi-Family 0-1 BR Rates:** Research indicated that 156 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 16,103 students registered in the District. No specific unit number matches were made.

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

	<b>K-5</b>	<b>6-8</b>	<b>9-12</b>	<b>K-12</b>
<b>Single Family</b>	.248	.102	.096	.446
<b>Multi-Family 2+ BR</b>	.342	.133	.143	.619

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

## APPENDIX B – SCHOOL IMPACT FEE CALCULATION

### MUKILTEO SCHOOL DISTRICT NO. 6

JURISDICTIONS: SNOHOMISH COUNTY, CITY OF MUKILTEO, CITY OF EVERETT

SCHOOL IMPACT FEE CALCULATION PREPARED: April 2020

#### 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 (1)	Student Factor MFR (2+)	Cost/ SFR	Cost/ MFR 1	Cost / MFR 2+
Elementary	10	\$ -	600	0.248	0.000	0.342	\$0	\$0	\$0
Middle	20	\$ -	750	0.102	0.000	0.133	\$0	\$0	\$0
High	40	\$ -	1,600	0.096	0.000	0.143	\$0	\$0	\$0
<b>TOTAL</b>							<b>\$0</b>	<b>\$0</b>	<b>\$0</b>

#### School Construction Cost:

*((Facility Cost/Facility Capacity) x Student Generation Factor x (Permanent/Total Sq. Ft)*

	% Perm/Total Sq. Ft	Facility Cost	Facility Capacity	Student Factor SFR	Student Factor MFR (1)	Student Factor MFR (2+)	Cost/ SFR	Cost/ MFR 1	Cost/ MFR 2+
Elementary	91.32%	\$44,243,223	600	0.248	0.000	0.342	\$16,700	\$0	\$23,030
Middle	98.94%	\$ -	0	0.102	0.000	0.133	\$0	\$0	\$0
High	93.18%	\$ -	0	0.096	0.000	0.143	\$0	\$0	\$0
<b>TOTAL</b>							<b>\$16,700</b>	<b>\$0</b>	<b>\$23,030</b>

#### Temporary Facility Cost:

*((Facility Cost/Facility Capacity) x Student Generation Factor x (Temporary/Total Sq. Ft)*

	% Temp/Total Sq. Ft.	Facility Cost	Facility Capacity	Student Factor SFR	Student Factor MFR (1)	Student Factor MFR (2+)	Cost/ SFR	Cost/ MFR 1	Cost/ MFR 2+
Elementary	8.68%	\$130,000	24	0.248	0.000	0.342	\$117	\$0	\$161
Middle	1.06%	\$130,000	27	0.102	0.000	0.133	\$5	\$0	\$7
High	6.82%	\$130,000	30	0.096	0.000	0.143	\$28	\$0	\$42
<b>TOTAL</b>							<b>\$150</b>	<b>\$0</b>	<b>\$210</b>

#### State School Construction Funding Assistance Credit:

*CCA x OSPI Sq Footage x District Funding Assistance% x Student Factor*

	Current CCA	OSPI Sq. Footage	Funding %	Student Factor SFR	Student Factor MFR (1)	Student Factor MFR (2+)	Cost/ SFR	Cost/ MFR 1	Cost/ MFR 2+
Elementary	\$238.22	90	49.21%	0.248	0.000	0.342	\$2,617	\$0	\$3,608
Middle	\$238.22	108	0.00%	0.102	0.000	0.133	\$0	\$0	\$0
High	\$238.22	130	0.00%	0.096	0.000	0.143	\$0	\$0	\$0
<b>TOTAL</b>							<b>\$2,617</b>	<b>\$0</b>	<b>\$3,608</b>

#### Tax Payment Credit Calculation:

Average Assessed Value	\$529,572	\$160,556	\$228,123
Capital Bond Int. Rate	2.44%	2.44%	2.44%
Years Amortized	10	10	10
Property Tax Levy Rate	\$0.89	\$0.89	\$0.89
<b>Tax Payment Credit</b>	<b>\$4,138</b>	<b>\$1,255</b>	<b>\$1,782</b>

#### Impact Fee Calculation Summary:

Site Acquisition Cost	\$0	\$0	\$0
Permanent Facility Cost	\$16,700	\$0	\$23,030
Temporary Facility Cost	\$150	\$0	\$210
State SCAP Credit	\$(2,617)	\$0	\$(3,608)
Tax Payment Credit	\$(4,138)	\$(1,255)	\$(1,782)
<b>Fee As Calculated</b>	<b>\$10,096</b>	<b>\$(1,255)</b>	<b>\$17,849</b>
50% Required Discount	\$(5,048)	\$(627)	\$(8,924)
<b>Impact Fee</b>	<b>\$5,048</b>	<b>\$0</b>	<b>\$8,924</b>



## APPENDIX C

### OSPI ENROLLMENT PROJECTIONS



**ICOS**

School Facilities and Organization  
 INFORMATION AND CONDITION OF SCHOOLS  
 Enrollment Projections (Report 1049)

**MUKILTEO**

Grade	--- ACTUAL ENROLLMENTS ON OCTOBER 1st ---						AVERAGE % SURVIVAL	--- PROJECTED ENROLLMENTS ---					
	2014	2015	2016	2017	2018	2019		2020	2021	2022	2023	2024	2025
Kindergarten	1,075	1,020	1,081	1,146	1,185	1,184		1,226	1,257	1,289	1,320	1,352	1,384
Grade 1	1,229	1,209	1,137	1,157	1,187	1,188	106.95%	1,266	1,311	1,344	1,379	1,412	1,446
Grade 2	1,238	1,255	1,199	1,144	1,159	1,185	100.37%	1,192	1,271	1,316	1,349	1,384	1,417
Grade 3	1,200	1,270	1,249	1,206	1,152	1,163	100.74%	1,194	1,201	1,280	1,326	1,359	1,394
Grade 4	1,139	1,226	1,315	1,240	1,222	1,158	101.36%	1,179	1,210	1,217	1,297	1,344	1,377
Grade 5	1,225	1,161	1,218	1,303	1,255	1,224	100.34%	1,162	1,183	1,214	1,221	1,301	1,349
<b>K-5 Sub-Total</b>	<b>7,106</b>	<b>7,141</b>	<b>7,199</b>	<b>7,196</b>	<b>7,160</b>	<b>7,102</b>		<b>7,219</b>	<b>7,433</b>	<b>7,660</b>	<b>7,892</b>	<b>8,152</b>	<b>8,367</b>
Grade 6	1,132	1,203	1,181	1,173	1,270	1,228	98.30%	1,203	1,142	1,163	1,193	1,200	1,279
Grade 7	1,146	1,161	1,230	1,159	1,191	1,292	101.23%	1,243	1,218	1,156	1,177	1,208	1,215
Grade 8	1,106	1,160	1,161	1,213	1,186	1,168	100.04%	1,293	1,243	1,218	1,156	1,177	1,208
<b>6-8 Sub-Total</b>	<b>3,384</b>	<b>3,524</b>	<b>3,572</b>	<b>3,545</b>	<b>3,647</b>	<b>3,688</b>		<b>3,739</b>	<b>3,603</b>	<b>3,537</b>	<b>3,526</b>	<b>3,585</b>	<b>3,702</b>
Grade 9	1,117	1,114	1,155	1,154	1,252	1,182	100.50%	1,174	1,299	1,249	1,224	1,162	1,183
Grade 10	1,138	1,120	1,118	1,130	1,163	1,247	99.76%	1,179	1,171	1,296	1,246	1,221	1,159
Grade 11	1,489	1,475	1,427	1,394	1,368	1,403	124.67%	1,555	1,470	1,460	1,616	1,553	1,522
Grade 12	1,487	1,506	1,550	1,490	1,444	1,412	103.48%	1,452	1,609	1,521	1,511	1,672	1,607
<b>9-12 Sub-Total</b>	<b>5,231</b>	<b>5,215</b>	<b>5,250</b>	<b>5,168</b>	<b>5,227</b>	<b>5,244</b>		<b>5,360</b>	<b>5,549</b>	<b>5,526</b>	<b>5,597</b>	<b>5,608</b>	<b>5,471</b>
<b>DISTRICT K-12 TOTAL</b>	<b>15,721</b>	<b>15,880</b>	<b>16,021</b>	<b>15,909</b>	<b>16,034</b>	<b>16,034</b>		<b>16,318</b>	<b>16,585</b>	<b>16,723</b>	<b>17,015</b>	<b>17,345</b>	<b>17,540</b>

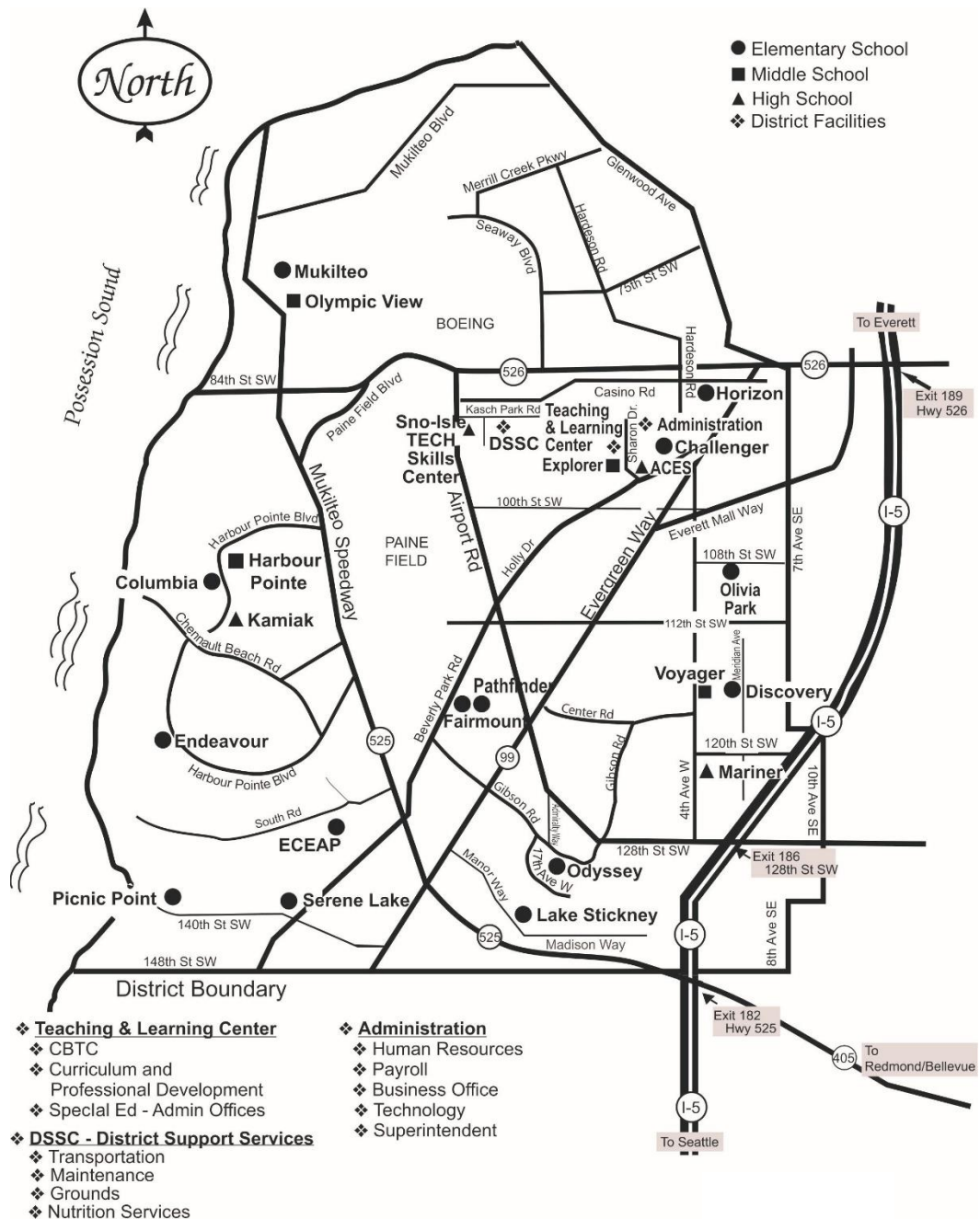
Notes: Specific subtotalling on this report will be driven by District Grade spans.

School Facilities and Organization

Printed Apr 09, 2020

## APPENDIX D

### MUKILTEO SCHOOL DISTRICT MAP



# CAPITAL FACILITIES PLAN 2020 - 2026

NORTHSHORE SCHOOL DISTRICT NO. 417  
3330 MONTE VILLA PARKWAY BOTHELL, WASHINGTON 98021-8972

**"STRENGTHENING OUR COMMUNITY THROUGH EXCELLENCE IN EDUCATION"**

## **BOARD OF DIRECTORS**

Bob Swain	President
Jacqueline McGourty	Vice President
Sandy Hayes	Director
David Cogan	Director
Amy Cast	Director

Dr. Michelle Reid, Superintendent

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# SECTION 1 -- INTRODUCTION

## Purpose of the Capital Facilities Plan

The Washington State Growth Management Act outlines thirteen broad goals including the adequate provision of necessary public facilities and services. Public schools are among these necessary facilities and services. Public school districts adopt 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 population in their districts.

The Northshore School District (District) has prepared this six-year Capital Facilities Plan (CFP) in accordance with the Washington State Growth Management Act, the Codes of King and Snohomish Counties, and the cities of Bothell, Kenmore, and Woodinville. This CFP is intended to provide these jurisdictions with a description of projected student enrollment and school capacities at established levels of service over the six-year period 2020-2026. It also provides longer-term enrollment projections. The role of impact fees in funding school construction is addressed in **Section 7** of this report.

The District updates its Capital Facilities Plan on an annual basis. The most recent update previous to this update was adopted by the Board of Directors in July 2019.

## Summary

Over the past six years, District enrollment has grown by 2,360 students – averaging nearly 400 new students each year – just short of the equivalent of one average-size new elementary school each year for the last six years. For 2019, the District experienced a more normal growth rate at 1.4 percent. This rate was just slightly under the District's projection. Continued growth in enrollment has resulted in capacity deficits at most schools in the northern and central service areas of the District.

Similar to the 2019 CFP, there are questions about future growth and whether or not it will continue at a rate at or above projections, or if growth will begin to stabilize. The sale of new homes in the District dropped from the prior two years. However, it still exceeds the home sales in seven of the previous eight years. The sale of existing homes continues to be strong, with over 2,000 existing homes sold in the last six years. Many of the single family housing projects in the north end of the District are reaching completion and the pipeline of new single family housing is currently shrinking. There are, however, townhome and some multi-family projects that could produce enrollment gains. New townhome and multi-family projects tend to have at least 3-bedrooms. At the present time, student generation rates from townhome units more closely resemble student generation rates from apartments and condominiums. The District is closely monitoring the actual student generation from these units.

The 2018 capital bond as approved by the voters includes three new projects to add capacity:

- A new elementary school is under construction at an undeveloped site on Maltby Road. That school has now been named Ruby Bridges Elementary.
- Another project involves additions to Canyon Creek Elementary and Skyview Middle school. These campuses are adjacent. This growth project added a new two story 30 classroom building. The 14 classrooms on the second floor of this building are for Canyon Creek Elementary classes (with four rooms for music instruction). The 12 classrooms on the first floor are for Skyview. Along with this new classroom building, each campus had some renovations and additions to other buildings. At Canyon Creek, there is a gymnasium addition. At Skyview, there were two new health classrooms attached to the gym.
- Finally, the 2018 bond proposal included a new concert hall with added instructional space at Inglemoor High School.

The District is also constructing a new choice high school (currently referred to as Innovation Lab High School) in the Canyon Park Business Center. Innovation Lab High School is an adaptive re-use of an existing building and will be funded in large part with school impact fee revenue.

The 2018 Capital Bond Planning Task Force discussed the potential inclusion of funding for a school adjacent to Ruby Bridges Elementary School in a future bond.

Growth in the District has largely been accommodated in recent years through the construction of new capacity, limiting waivers at most schools, converting special-use portables and non-classroom spaces into classroom space, and placement of additional portable classrooms.

## **Overview of the Northshore School District**

The Northshore School District spans 60 square-miles and primarily serves five jurisdictions: King County, Snohomish County, the City of Bothell, the City of Kenmore, and the City of Woodinville. There are some addresses located in the cities of Brier, Kirkland and Redmond, but they are either in areas not expected to experience any new residential development or in very small areas with previously developed residential areas. For the purposes of the District's CFP and long-term projections, those areas are considered de minimis impacts on the District's grade bands. The King-Snohomish county line divides the District such that roughly two-thirds of the District is in King County and one-third in Snohomish County. The District has a total population of approximately 140,000 and a 2019 student enrollment of 22,943 There are presently twenty elementary schools, six middle schools, four comprehensive high schools, one alternative high school program, one Home

Schooling Program, and one early childhood (pre-K) center. The current grade configuration is K-5, 6-8 and 9-12.

The Urban Growth Area boundary (UGA) divides the District, creating capacity utilization challenges. As new residential development continues to occur even at more moderate rates, land for potential new school sites continues to be scarce. King County does not allow for school siting outside the UGA, but Snohomish County does provide for school siting via a Conditional Use Permit (CUP) process. The new Ruby Bridges Elementary School and a planned new middle school are on property located outside the UGA in unincorporated Snohomish County.

The District participates in regular conversations regarding school facilities planning with jurisdictions in King County pursuant to regular meetings held to comply with Policy PF-19A of the King County Countywide Planning Policies. Snohomish County's Countywide Planning Policies direct jurisdictions in Snohomish County to "ensure the availability of sufficient land and services for future K-20 school needs." Policy ED-11. The District appreciates any opportunity for cooperative planning efforts with its jurisdictions.

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

### **Background**

Elementary enrollment has been growing over the past several years, primarily due to larger birth cohorts and a consistent increase in new residential development. This wave of elementary enrollment growth is beginning to move into the middle and high school grades and is anticipated to continue over the next 5 to 10 years.

Similar to past years, this year's projections considered regional and local trends in population growth, birth rates, and housing development, analyzing corresponding projections down to the school 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 enrollment 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.

### **Trends/Projections**

While new single family home construction and sales within the District are continuing to slow, there is a marked increase in the development of townhomes and continued strong development of apartments and condominiums. The new townhome developments include units with 3 bedrooms or more. From a student generation perspective, it could take a few years for enrollment numbers to be affected, as those townhomes complete construction, sell and become occupied.

As of October 2019, development data shows 1,035 single family homes and 2,675 multi-family units in the development pipeline within the District. This data excludes short plat development.

### **Methodology**

Numerous methodologies are available for projecting long-term enrollments. The most common method is known as the cohort survival method. This method tracks groups of students through the system and adjusts the population 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, for which there is no previous year data. For kindergarten, two methodologies are generally used:

- A linear extrapolation from the previous five years of kindergarten enrollment, assuming that there is a trend;
- Or, alternatively, a comparison of the kindergarten enrollment to births from five years prior can be used to calculate a "birth-to-K" ratio. For example,



kindergarten enrollment in 2019 is divided by the total births in King and Snohomish counties in 2014 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 school districts in the state for the limited purpose of the School Construction Assistance Program. The cohort survival method 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 rate trends.

The District has, for several years, worked with a professional demographer to combine the cohort survival methodology with other information about births, housing, regional population trends, and even trends in service area and private school enrollment. This modified cohort survival methodology has provided the District with a more accurate forecast. **Table 2-1 below** includes the enrollment projections based on this model.

**TABLE 2-1**  
**FTE Enrollment Projections (medium range), incl. housing permit & birth rate data**

Grade	Actual	Projections					
	19/20	20/21	21/22	22/23	23/24	24/25	25/26
K	1718	1712	1751	1698	1647	1694	1693
1	1805	1798	1783	1814	1759	1706	1755
2	1814	1856	1849	1833	1865	1809	1746
3	1777	1834	1876	1869	1853	1885	1819
4	1901	1792	1850	1902	1885	1869	1902
5	1817	1908	1799	1866	1909	1892	1876
6	1896	1822	1913	1810	1877	1920	1893
7	1787	1907	1826	1914	1810	1884	1927
8	1835	1800	1924	1842	1932	1814	1887
9	1795	1888	1852	1970	1886	1988	1867
10	1730	1803	1894	1857	1966	1885	1987
11	1646	1616	1658	1742	1699	1836	1770
12	1422	1588	1540	1581	1652	1640	1781
Total K-5	10,832	10,900	10,908	10,982	10,918	10,855	10,791
Total 6-8	5,518	5,529	5,663	5,566	5,619	5,618	5,707
Total 9-12	6,593	6,895	6,944	7,150	7,203	7,349	7,405
Total	22,943	23,324	23,515	23,698	23,740	23,822	23,903

The modified cohort survival methodology in **Table 2-1 above** shows continued enrollment increases within the District through the six year planning period. The methodology uses a “mid-range” projection. In total, the projected K-12 increase in enrollment is 959 students over the six-year period. While elementary enrollment is expected to grow before leveling off some at the end of the next six years, the grade span continues to show overall enrollment growth immediately beyond the six-year planning period. The District intends to watch K-5 enrollment closely and will update the projections and related planning as necessary based on actual experience. However, given recent trends and knowledge of development within the pipeline, the District expects to see continued growth at the K-5 level throughout the six year planning period and beyond.

### Long Range Projections

The modified cohort methodology described above was extrapolated to 2030 to produce a longer- range forecast (**Table 2-2**). Using this methodology, the District’s enrollment shows continued growth to 2030. This longer range model assumes that the State forecasts of births, K-12 growth, and continued population growth for the Puget Sound are reasonably accurate.

**TABLE 2-2  
Projected FTE Enrollment**

grade band	2019	2025	2030
Elementary:	10,832	10,791	11,107
Middle School:	5,518	5,707	5,637
High School:	6,593	7,405	7,855
Total:	22,943	23,903	24,599

Future growth trends are uncertain. Changes in population growth, fertility rates, new housing development slowdown, 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.

### SNOHOMISH COUNTY/OFM PROJECTIONS

Using OFM/County data provided by Snohomish County, the District projects a 2035 student FTE population of 24,887 (**Table 2-2.1**). For the six year period between 2014 and 2019, the District’s actual enrollment averaged 39.7% 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 and comparative purposes.

**TABLE 2-2.1**  
**Projected FTE Enrollment – 2035 OFM Estimates\***

grade band	2019	2025	2035
Elementary:	10,832	11,277	11,749
Middle School:	5,518	5,744	5,985
High School:	6,593	6,864	7,153
Total:	22,943	23,885	24,887

\*Assumes that percentage per grade span will remain constant through 2035;

## SECTION 3 -- DISTRICT STANDARD OF SERVICE

### Primary Objective

Optimizing student learning is the heart of what the Northshore School District strives for in establishing its service standard for classroom capacity utilization. This requires a constant review and assessment of programs, curriculum and instructional changes, student learning behaviors, learning environments, technological innovations and program development. Equitable access to programs for all students is also a school board driven goal and the District is continually striving for process and methods in which all students have the ability to access the best learning environment. Additional variables include changes in mandatory requirements dictated by the state, such as full-day kindergarten, Core 24 graduation requirements, and reduced K-3 class size ratios. These elements, as well as demographic projections, are weighed when determining service levels.

### Existing Programs and Standards of Service

The District currently provides traditional educational programs and nontraditional programs (**See Table 3-1**). These programs are reviewed regularly to determine the optimum instructional methods and learning environments required at each school, with added attention to equitable access across the District. 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 changes, project/problem 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 students per classroom instead of 24 students per classroom.

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 (eliminating the only 2 left at elementary – moving to “one to one” next year)		X
Group Activities Rooms	X	
Early Childhood Headstart (Federal) ECEAP (State)	X	
Elementary Advanced Placement (EAP)	X	
Advanced Academic Placement (AAP)		X
Parents Active in Cooperative Education (PACE)	X	
Dual Language (DL)	X	
<b>Special Education:</b> <ul style="list-style-type: none"> <li>• Learning Centers (LC)</li> <li>• Mid-Level (Sensory; Social Emotional at elementary. Positive Behavior Support at secondary)</li> <li>• Blended</li> <li>• Functional Skills &amp; Academics</li> <li>• Adult Transitions Program (ATP) for 18-21 year olds</li> </ul>	X	X
Learning Assistance Program (LAP)/Title I (Elementary & Middle School)	X	X
English Language Learners (ELL)	X	X
Title I	X	
Northshore Network Northshore Family Partnership	X	X
Alternative School Program		X
Career Technical Education (CTE) – including specialized programs such as Automotive, Composites, Culinary Arts, Robotics, Sustainable Engineering and Design, Project Lead the Way)		X
International Baccalaureate (IB) & Advanced Placement (AP)		X
Running Start		X
College in the High School		X

Capacity is affected at the buildings housing these programs. Special programs usually require space modifications and frequently have lower class sizes than other, more traditional programs; this potentially translates into greater space requirements. These requirements affect the utilization of rooms and result in school capacities varying from year to year (as programs move or grow, depending on space needs, capacity can change or decline in a school).

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**

<b>Classroom Type</b>	<b>Elementary – Average Students Per Classroom</b>	<b>Middle School – Average Students Per Classroom</b>	<b>High School – Average Students Per Classroom</b>
Kindergarten	22	NA	NA
Regular, Alternative, EAP, AAP, AP, IB	24	24	27
Regular (portables)	24	24	27
Special Education – Mid Level	12	12	12
Special Education – Functional Skills and Academics	8	8	8
Blended (15 regular & 6 special education students)	21	NA	NA
Special Education Preschool	8	NA	NA
CTE	NA	24	27

Snohomish County requires that the District’s plan include a report regarding the District’s compliance with the District’s minimum levels of service for the school years 2017-19. **Table 3-3** shows the District’s average students per teaching station as a measurement of its minimum levels of service as of October 1 for each year.

**TABLE 3-3**  
**Average Students per Scheduled Teaching Station**  
 (regular classrooms)

<b>Grade Level</b>	<b># of Scheduled Teaching Stations</b>	<b>Minimum Level of Service</b>	<b>2017-18</b>	<b>2018-19</b>	<b>2019-20</b>
K-5	505	24	21.5	21.8	21.4
6-8	241	24	21.2	22.0	22.9
9-12	288	27	22.0	22.6	22.9
<b>Total</b>	<b>1,034</b>		<b>21.6</b>	<b>22.0</b>	<b>22.2</b>

total all teaching stations per grade band

## SECTION 4 – CAPITAL FACILITIES INVENTORY

### 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.

Variations in student capacity between schools are often a result of the number of specialized programs offered at specific schools. These programs require additional classroom space per student, which can reduce the permanent capacity of the school. Further, capacities will change from year-to-year based on changes to existing instructional programs, projected programs and the resulting required space needed to deliver the instructional model at each site. To monitor this, and for use in preliminary capacity planning, the District establishes classroom capacities for planning purposes. This is the maximum number of students a school can accommodate based on a standard room capacity. These figures are then compared to the actual room utilization rate on a regular basis.

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 the defined service levels (*see Table 3-2*), ranging from 8 to 24 students per room. Because of the need to provide planning time and space for teacher preparation or other required services, some facilities will only support a capacity utilization of 85%. In secondary schools, the utilization percentage may be higher. Capacities are updated annually in the CFP to reflect current program needs and classroom utilization.

### Schools

The District currently operates twenty elementary schools, six middle schools, and four comprehensive high schools. The District also has one alternative secondary school program, a home school program and an early childhood center. **Table 4-1** shows the District's permanent and portable student capacity for the 2019-20 school year. In the 2020-21 school year, Bear Creek Elementary School will transition to housing only programs for the Northshore Family Partnership and Northshore Network. Bear Creek, in addition to providing K-5 regular capacity, has been used in recent years for highly capable and functional skills academy programs. The latter two programs will continue in District with students participating in the programs at their "home" elementary schools.



**TABLE 4-1  
2019-20 School Capacity Inventory**

School	Year Built	Last Modernization or addition	Permanent Classroom Capacity	Portables	Interim Capacity	% of Total	Total Capacity
Arrowhead	1957	1994/2011	359	3	72	17%	431
Bear Creek	1988	2011	406	0	0	0%	406
Canyon Creek	1977	1999/2008	502	10	219	30%	721
Cottage Lake	1958	2005	365	0	0	0%	365
Crystal Springs	1957	2002/2010	402	8	171	30%	573
East Ridge	1991		367	0	0	0%	367
Fernwood	1988	2002/2010	512	14	322	39%	834
Frank Love	1990		420	10	212	34%	632
Hollywood Hill	1980	2001	347	0	0	0%	347
Kenmore	1955	2002/2011	381	5	106	22%	487
Kokanee	1994		446	12	260	37%	706
Lockwood	1962	2004/2011	534	5	99	16%	633
Maywood Hills	1961	2002	400	8	192	32%	592
Moorlands	1963	2002/2011	537	7	192	26%	729
Shelton View	1969	1999/2011	407	4	82	17%	489
Sorenson ECC *	2002			3	0		-
Sunrise	1985		369	0	0	0%	369
Wellington	1978	2000/2011	505	2	41	8%	546
Westhill	1960	1995/2011	354	8	260	42%	614
Woodin	1970	2003	402	5	120	23%	522
Woodmoor	1994		817	0	0	0%	817
<b>Subtotal</b>			<b>8,832</b>	<b>101</b>	<b>2,348</b>	<b>21%</b>	<b>11,180</b>
Canyon Park	1964	2000/2005	918	2	48	5%	966
Kenmore	1961	2002/2008/2012	826	1	24	3%	850
Leota	1972	1998	803	7	168	17%	971
Northshore	1977	2004	895	4	96	10%	991
Skyview	1992		872	4	96	10%	968
Timbercrest	1997		826	0	0	0%	826
<b>Subtotal</b>			<b>5,141</b>	<b>18</b>	<b>432</b>	<b>8%</b>	<b>5,573</b>
Bothell	1953	2005	1584	0	0	0	1,584
Inglemoor	1964	1993/95/98	1492	6	162	10%	1,654
Woodinville	1983	1994/08/11/16	1561	0	0	0	1,561
North Creek	2016	2016	1446	0	0	0	1,446
SAS	2010		217	0	0	0	217
<b>Subtotal</b>			<b>6,299</b>	<b>6</b>	<b>162</b>	<b>3%</b>	<b>6,461</b>
<b>Total K-12 All</b>			<b>20,272</b>	<b>125</b>	<b>2,942</b>	<b>13%</b>	<b>23,214</b>

\*Sorenson Early Childhood Center serves students age 3-5yrs and does not provide any capacity for K-5 grades

## Relocatable Classroom Facilities (Portables)

Portable classrooms provide temporary/interim classroom space to house students until permanent facilities can be constructed and to prevent over-building of permanent capacity. Traditionally, the District has aimed to keep its total capacity provided by portables at or below 10% to a maximum of 15% percent of its total capacity. This percentage fluctuates, impacted by growth and changes in instructional program needs.

Portables 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. The District regularly reassesses the need for portables as permanent capacity is built or other changes occur (such as revisions to instructional programs). At this time, the District anticipates a continued need for portables as a part of the capacity solution. In some cases, portables may be moved from one grade band to another to address capacity needs. Future updates to the CFP will note any adjustments.

A typical portable classroom provides capacity for 24 students at the elementary level or 27 at the secondary level. Portables are used to meet a variety of instructional needs. Of the 155 portable classrooms that the District owns, 125 are currently being used as classrooms for scheduled classes. The District's Enrollment Demographics Task Force (EDTF) has recommended that the District begin to phase out older portables as capacity allows, but with recent growth trends, the District continues to be reliant on this interim capacity. All portables are inspected regularly and upgraded as needed, or as systems require.

**Table 4-1** includes the portables used for scheduled classrooms. Not included in the interim classroom capacity are portables that are used for daycare, PTA, conference rooms/resource rooms, OT/PT, LAP, science or other labs, ASB, music or other non-instructional uses. **Table 4-2** shows all portables and identifies those used for regular classroom purposes at each school.

**TABLE 4-2  
2019-2020 Interim Classroom Capacity**

Portables		Grades	Grades	2019 Interim Student Capacity*
<i>Elementary School</i>		<i>Grades 4-5</i>	<i>Grades K-3</i>	
Arrowhead	5	3	0	72
Bear Creek	0	0	0	-
Canyon Creek	12	7	3	219
Cottage Lake	0	0	0	-
Crystal Springs	10	5	3	171
East Ridge	0	0	0	-
Fernwood	17	12	2	322
Frank Love	14	6	4	212
Hollywood Hill	2	0	0	-
Kenmore	9	3	2	106
Kokanee	12	8	4	260
Lockwood	6	2	3	99
Maywood Hills	10	8	0	192
Moorlands	9	7	0	192
Shelton View	4	2	2	82
Sorenson ECC**		0	0	-
Sunrise	2	0	0	-
Wellington	4	1	1	41
Westhill	8	4	4	260
Woodin	6	5	0	120
Woodmoor	0	0	0	-
<b>Subtotal</b>	<b>130</b>	<b>73</b>	<b>28</b>	<b>2,348</b>
<i>Middle School</i>		<i>Grades 6-8</i>		
Canyon Park	2	2		48
Kenmore	1	1		24
Leota	7	7		168
Northshore	4	4		96
Skyview	4	4		96
Timbercrest	1	0		-
<b>Subtotal</b>	<b>19</b>	<b>18</b>		<b>432</b>
<i>High School</i>		<i>Grades 9-12</i>		
Bothell	0	0		-
Inglemoor	6	6		162
North Creek	0	0		-
Woodinville	0	0		-
SAS	0	0		-
<b>Subtotal</b>	<b>6</b>	<b>6</b>		<b>162</b>
<b>Total K-12</b>	<b>155</b>		<b>125</b>	<b>2,942</b>

\* capacity changes due to legislatively mandated K-3 class size reduction

*\*\*Sorenson ECC serves ages 3-5yrs & does not provide capacity for K-5 grades*

## Other Facilities

In addition to 32 school sites, the District owns and operates sites that provide transportation, administration, maintenance and operational support to 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 District is constructing Ruby Bridges Elementary School and planning for a new middle school on the 20521 48<sup>th</sup> Drive SE (formerly known as the “Maltby Road” site). The District also repurposing the Canyon Park 3-story commercial building the new Innovation Lab High School.

**TABLE 4-3**  
**Inventory of Support Facilities & Underdeveloped Land**

Facility Name	Building Area (Sq. Feet)	Site Size (Acres)
Administrative Center (Monte Villa)	49,000	5
Support Services Building	41,000	5
Warehouse	44,000	2
Transportation	39,000	9
Ruby Bridge ES/MS#7 – 20521 48 <sup>th</sup> Drive SE		33
CP4 – Canyon Park 3-story Commercial Bldg. - Renovation to Choice Program High School 2020 224th St SE Bothell, WA	68,000	6
19827 88th Ave NE		10
18416 88 <sup>th</sup> Ave NE		50,011 sf
15215,15123, 15127 84 <sup>th</sup> Ave NE (3 parcels adjacent to Moorlands ES)		30,500 sf
Paradise Lake Site*		26
Wellington Hills Site**		104

*\*Note: Paradise Lake property is located in King County, outside the Urban Growth Area. In 2012, King County prohibited the siting of schools outside the UGA; although the property was purchased prior to that change, it is not currently useable as a potential school site.*

*\*\*Note: The Wellington property is located in Snohomish County, adjacent to the Maltby Urban Growth Area. In 2015, a purchase and sale agreement was signed and entered into between Snohomish County and Northshore School District, but legal challenges ensued and closing of the property sale was delayed until October 2017. A settlement agreement was reached in 2019 and recorded under Snohomish County Recording No. 201906210221. The District has no active project at this site, nor are there definitive short or long-term plans for siting a school at this location.*

## SECTION 5 – PROJECTED FACILITY NEEDS

### Planning History

In 2001, Northshore School District Board of Directors established a board policy to create a standing, community-based taskforce to study District-wide enrollment and demographic changes and the resulting impacts on school capacity needs, instructional programs, or other variables. The Enrollment Demographic Task Force (EDTF) examines enrollment projections, capacity considerations, student impacts, cost impacts, program needs, etc., and boundary adjustments based upon the above. The committee recommends potential solutions to the school board. If approved by the board, these recommended actions are implemented by the District and incorporated into the Capital Facilities Plan.

Over the past six years, District enrollment has grown by over 11% or 2,360 new students. The elementary grade span has grown by over 1,200 new students in that time; an equivalent of 2-3 new elementary schools. To accommodate that growth, EDTF identified the following strategies (in order of priority) for the District to employ when addressing existing and future capacity needs.

### *Capacity Mitigation Tools Used*

<b><i>Shorter Lead Time</i></b>	<b><i>Task</i></b>	<b><i>Complete</i></b>
	Utilize existing spaces more creatively	<b>X</b>
	Adjust waiver policies	<b>X</b>
	Adjust program placements	<b>X</b>
	Move classes to schools with capacity	<b>X</b>
	Move existing portables	<b>X</b>
	Install new portables	<b>X</b>
	Lease space	<b>X</b>
<b><i>Longer Lead Time</i></b>		
	Adjust service areas	<b>X</b>
	Adjust feeder patterns	<b>X</b>
	New construction (North Creek High School)	<b>X</b>
	Acquire new property	<b>X</b>
	New construction (Ruby Bridges ES, Skyview/CC, ILHS, MS#7)	<b><i>In progress</i></b>

In May 2016, the school board approved the following EDTF recommendations specific to accommodating growth:

*“Provide flexible capacity to accommodate continued growth and program access by constructing facilities at the “Maltby Road” site (capable of supporting 500 elementary and 700 middle school students) as well as a 24+ classroom wing at the Skyview/Canyon Creek campus. Fund these projects using the 2018 bond for potential opening in fall of 2020; and continue to look for and acquire property to address future anticipated growth in the north/central portions of the District.”*

The 2016 EDTF recommendations are in progress following the voter’s approval of the 2018 Bond, with the Skyview/Canyon Creek campus addition opening in early 2020.

### **Planned Improvements - Construction to Accommodate New Growth**

The continued increase in enrollment has fully exhausted capacity increases from relocating building programs, portable additions, grade reconfiguration, and boundary changes. Growth continues to outpace school capacity. Growth has been concentrated in northern and central portions of the District.

This 2020 CFP update includes the construction of a new elementary school (Ruby Bridges Elementary School) and planning for a new middle school at that same site. Classroom additions at Canyon Creek Elementary School and Skyview Middle School are projected to be complete for the 2020-21 school year. The development of Ruby Bridges Elementary has been complicated and expensive due to necessary extension of utilities, large on-site sewer/septic, complicated easements with residents and with city, county and state jurisdictions, and storm water management. The District also is renovating a 3-story commercial building and 6-acre lot in the Canyon Park Business Center for the Innovation Lab High School and adding capacity at Inglemoor High School. The District may also purchase additional portable facilities to address growth needs. See **Table 5-1**.

Long-term projections indicate growth of 1,657 new students in the next ten years. The District will continue to monitor the factors that shape our capacity needs, i.e.; statewide legislative changes, instructional delivery requirements, the economy, changes in planned land use, changes in mandated program requirements, equitable access to programs, building permit activity, and birth rates, in order to help ensure needed instructional space is available when/where needed and will pursue additional land acquisition should construction of additional sites be necessary to accommodate those needs. Future updates to this CFP will include relevant information.

### **Portable Location Adjustments**

Where growth results in capacity deficits at a specific grade band, portables may be relocated from one grade band to another to assist with meeting enrollment projections. In addition, the District may adjust program space within permanent facilities to move programs to portables to free up space in permanent facilities for

additional regular student capacity.

The District plans to add portables at Canyon Park Middle School for the 2020-21 school year. See **Section 4** for more detail regarding portables.

**New Facilities and Additions**

**TABLE 5-1  
Planned Construction Projects – Growth Related**

Growth Projects	Estimated Completion Date	Projected Student Capacity Added
4709 Maltby Rd, Woodinville New Elementary Capacity Phase I (Ruby Bridges Elementary At 20521 49 <sup>th</sup> Drive SE) Potential New School Capacity - Phase II	2020 2023-2024	500 700
21404 35th Ave SE, Bothell - Skyview MS/Canyon Creek Canyon Creek Elementary Expansion	2020	336
Skyview Middle School Expansion	2020	321
15500 Simonds Rd NE, Kenmore - Inglemoor High School Concert Hall & Instructional Space	2021-2022	100
2020 224th St SE, Bothell - Canyon Park Business Park Innovation Lab High School	2020- 2022	550
Portable Facilities	2019-2025	TBD

**Capacity Analysis**

The District’s six-year capacity analysis, considering projected enrollment and planned new capacity, is shown in **Table 5-2**. As with any long-term projections, many assumptions and estimates on housing must be made, increasing the risk associated with the accuracy of the enrollment projections. However, the District has trended above mid-range projections in years past and with a continuing strong real estate and development market, the District will plan for continued growth as projected.



**TABLE 5-2  
School Enrollment & Classroom Capacity**

	<b>2019-20*</b>	<b>2020-21</b>	<b>2021-22</b>	<b>2022-23</b>	<b>2023-24</b>	<b>2024-25</b>	<b>2025-26</b>
<b>Elementary Enrollment</b>	10,832	10,900	10,908	10,982	10,918	10,855	10,791
Permanent Capacity**	8,832	8,426	9,262	9,262	9,262	9,262	9,262
New Permanent Capacity – Ruby Bridges Elem.		<b>500</b>					
New Permanent Capacity – Canyon Creek		<b>336</b>					
Capacity in Portables	2,348	2,348	2,348	2,348	2,348	2,348	2,348
Total Capacity including Portables	11,180	11,610	11,610	11,610	11,610	11,610	11,610
<b>Permanent Capacity over/(short)</b>	(2,000)	(1,638)	(1,646)	(1,720)	(1,656)	(1,593)	(1,529)
<b>Total Capacity (w/portables)</b>	348	710	702	628	692	755	819
<b>Middle School Enrollment</b>	5,518	5,529	5,663	5,566	5,619	5,618	5,707
Permanent Capacity - Existing	5,141	5,141	5,462	5,462	5,462	5,462	6,162
New Permanent Capacity – Skyview; Potential Maltby Site School		<b>321</b>				<b>700</b>	
Capacity in Portables	432	432	432	432	432	432	432
Total Capacity with Portables	5,573	5,894	5,894	5,894	5,894	6,594	6,594
<b>Permanent Capacity over/(short)</b>	(377)	(67)	(201)	(104)	(157)	544	455
<b>Total Capacity (w/portables)</b>	55	365	231	328	275	976	887
<b>High School Enrollment</b>	6,593	6,895	6,944	7,150	7,203	7,349	7,405
Permanent Capacity - Existing	6,299	6,299	6,449	6,949	6,949	6,949	6,949
New Perm. Capacity – Inglemoor; ILHS		<b>150</b>	<b>500</b>				
Capacity in Portables	162	162	162	162	162	162	162
Total Capacity with Portables	6,461	6,611	7,111	7,111	7,111	7,111	7,111
<b>Permanent Capacity over/(short)</b>	(294)	(446)	5	(201)	(254)	(400)	(456)
<b>Total Capacity (w/portables)</b>	(132)	(284)	167	(39)	(92)	(238)	(294)
<b>Total Enrollment</b>	22,943	23,324	23,515	23,698	23,740	23,822	23,903
Permanent Capacity - Existing	20,272	19,866	21,173	21,673	21,673	21,673	22,373
Capacity in New Permanent Facilities	-	<b>1,307</b>	<b>500</b>	-	-	<b>700</b>	-
Capacity in Portables	2,942	2,942	2,942	2,942	2,942	2,942	2,942
Total Capacity with Portables	23,214	24,115	24,615	24,615	24,615	25,315	25,315
<b>Permanent Capacity over/(short)</b>	(2,671)	(2,151)	(1,842)	(2,025)	(2,067)	(1,449)	(1,530)
<b>Total Capacity (w/portables)</b>	271	791	1,100	917	875	1,493	1,412

\* Actual October 2019 enrollment

\*\*Capacity change in 2020-21 due to repurposing of Bear Creek Elementary School. See discussion in Section 4.

**TABLE 5-3****Year 2030 - Long-term Projection of Enrollment and Capacity***Assumes added new capacity projects included in this CFP*

<b>Grade Level</b>	<b>Enrollment</b>	<b>Permanent Capacity</b>	<b>Total Capacity</b>	<b>Permanent surplus/(short)</b>	<b>Total surplus/(short)</b>
Elementary	11,107	9,262	11,610	(1,845)	503
Middle School	5,637	6,162	6,594	525	957
High School	7,855	6,949	7,111	(906)	(744)
Total	24,599	22,373	25,315	(2,226)	716

**Planned Improvements – Existing Facilities (Building Improvement Program)**

In a number of other sites where the existing facility layout (building envelope) meets instructional needs and building structural integrity is good, individual building systems (such as HVAC, mechanical, flooring, roofing) are identified for replacement or modernization to extend the life of the overall site and ensure optimal learning environment for students. The District is implementing building improvement projects funded as a part of the 2018 Bond. *See **Table 6-1** in Section 6 below.*

## **SECTION 6 – 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 then retired through collection of property taxes. The District's Board of Directors, upon the recommendation of the Capital Bond Planning Task Force, sent a \$275 million bond measure to the voters, in February 2018 to provide funding for growth-related projects included in this Capital Facilities Plan as well as other District-wide Building Improvement or capital infrastructure needs, as identified in Table 7-1. The voters approved the bond measure by 60.78%. The District's Board of Directors will consider sending a bond to the voters in 2022 to fund a new school on the undeveloped portion of the property shared with Ruby Bridges Elementary School.

### **State School Construction 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 General Obligation funds or the Superintendent of Public Instruction can prioritize projects for funding.

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 requires 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 or eligibility criteria and funding formulas revised. Eligibility for state match is continually reviewed. The school impact fee formula assumes that the District may receive some portion of state funding assistance for the Inglemoor Concert Hall and added instructional space project, but currently no other projects on the planned construction list, that are adding capacity to meet growth demands, were eligible for state school construction assistance. Future updates to this plan will include updated information, as it becomes available.

## **Impact Fees (See Section 7 for background, detail, and methodology)**

The Washington State Growth Management Act (GMA) authorizes cities and counties that plan under RCW 36.70A.040 to collect impact fees to supplement funding of additional system improvements (e.g., public facilities such as schools) needed to accommodate growth from new development. The statute is clear that the financing of needed public facilities to serve growth cannot be funded solely by impact fees but rather must be balanced with other sources of public funds.

## **Budget and Financing Plan**

Table 6-1 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 contingency.

Table 6-1 identifies 2019 and future planned expenditures. It does not include project expenditures in previous years.

**TABLE 6-1**  
**6-Year Capital Expenditures Finance Plan**

<b>2020 - 2026 CAPITAL FACILITIES EXPENDITURES PLAN</b>							
<b>\$\$ in MILLIONS</b>	<b>FY 19-20</b>	<b>FY 20-21</b>	<b>FY 21-22</b>	<b>FY 22-23</b>	<b>FY 23-24</b>	<b>FY 24-25</b>	<b>FY 25-26</b>
<b>PROJECTS ADDING CAPACITY</b>							
Inglemoor HS Concert Hall & Instructional Space	7.0	18.0	5.0	3.0			
SMS/CC Elem & MS Capacity Addition	8.0	5.0	1.0				
Ruby Bridges Elementary (Maltby) capacity 2020	20.0	5.0	5.0				
New School capacity - future	1.0	1.0	50.0	12.0	40.0	40.0	
Innovation Lab High School (not bond funded)	20.0	7.0	2.0	1.0			
<b>TOTAL PROJECTS ADDING CAPACITY</b>	<b>56.0</b>	<b>36.0</b>	<b>63.0</b>	<b>16.0</b>	<b>40.0</b>	<b>40.0</b>	<b>0.0</b>
<b>PROJECTS NOT ADDING CAPACITY</b>							
Building Improvement Program	15.0	8.0	5.0	15.0	20.0	20.0	
Technology	2.0	2.0	2.0	2.0	2.0	2.0	
Fields	1.0	2.0	1.0		1.0	2.0	
Code Compliance/Small Works	1.0	1.0	2.0	0.0	1.0	1.0	
Site Purchase/Circulation		2.0	2.0	1.0	1.0	1.0	
Overhead/Bond Expenses	4.0	3.0	2.0	1.0	2.0	1.5	
Security	9.0	3.0	1.0	0.0	5.0	3.0	
<b>TOTAL PROJECTS NOT ADDING CAPACITY</b>	<b>32.0</b>	<b>21.0</b>	<b>15.0</b>	<b>19.0</b>	<b>32.0</b>	<b>30.5</b>	<b>0.0</b>
<b>TOTAL PROJECT EXPENDITURES</b>	<b>88.0</b>	<b>57.0</b>	<b>78.0</b>	<b>35.0</b>	<b>72.0</b>	<b>70.5</b>	<b>0.0</b>

## **SECTION 7 -- 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 growth/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. The basic underlying assumption is that growth pays for growth.

Enrollment declines beginning around 2002 kept the District from meeting the required eligibility criteria to collect school impact fees. The District is spread across two counties and also across the urban growth boundary. While development picked up on the north end of the District, there was still ample capacity in the south east area of the District. Because of the statutes and ordinances governing school District eligibility criteria to be able to collect school impact fees, the District was not able to re-establish eligibility for collection of school impact fees until 2016. King County and the cities of Bothell, Kenmore, and Woodinville have all adopted the District's 2019 CFP and are collecting impact fees identified in that plan. Snohomish County has adopted the District's 2018 CFP and is collecting impact fees associated with that plan. We anticipate all the above jurisdictions to consider and adopt this 2020 CFP this fall either as part of their regular budget cycle or, in the case of Snohomish County, as part of its biennial schedule.

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

Impact fees may be calculated based on the District's cost per dwelling unit to purchase/acquire land for school sites, make site improvements, construct schools and purchase/install temporary facilities (portables), all for purposes of growth-related needs. The costs of projects that do not add growth-related capacity are not included in the impact fee calculations. The impact fee formula calculates a "cost per dwelling unit". New capacity construction costs addressing the District's growth-related needs, are used in the calculation

A student factor (or student generation rate) is used to identify the average cost per NEW dwelling unit by measuring the average number of students generated by each NEW (sold and occupied) housing type (single family dwelling and multi-family dwellings of two bedrooms or more – including townhomes). The student generation rate used is an actual generation of students by grade level that came from new development over a period of five (5) years. The student factor analysis for the District is included in Appendix B. The student factors in Appendix B are based on all newly constructed, sold, and occupied units.

The District's student-generation rate for multi-family dwelling units is much lower than the student generation rate for single-family homes. This likely reflects, in part, that most new development in recent years within the District has been in single family homes. Yet, as available land for single family development is beginning to be constrained, and multi-family development – most notably townhomes, is increasing, we anticipate continued increases in student generation rates from those units over time. In particular, the District's student generation rates, when isolated for townhomes only, show that more students are residing in those units than in traditional multi-family units. However, the District does not yet have a robust data set upon which to separate these units for purposes of the school impact fee calculation. The District will continue to collect and analyze this data and, if the trend continues, will likely request in future CFP updates that each jurisdiction consider amendments to the school impact fee ordinance to recognize the impacts of townhome units as different from apartments and condominium units.

As required under GMA, credits are applied for State School Construction Assistance Funds to be reimbursed to the District, where expected, and projected future property taxes to be paid by the dwelling unit toward a capital bond/levy funding the capacity improvement. Formula driven fees are identified in Appendix C.

Snohomish County Code (30.66C) and King County Code (21A.43) establish each jurisdiction's authority to collect school impact fees on behalf of the District. The formula for calculating impact fees is substantively identical in each code (with one exception that Snohomish County has separate fees for Multi-Family Units with 1 bedroom or less and Multi-Family Units with 2+ bedrooms). The codes of each of the cities are similar to those of the counties. These codes establish the conditions, restrictions, and criteria for eligibility to collect impact fees. Both counties define a school district's "service area" to be the total geographic boundaries of the school district.

The District updates the Capital Facilities Plan on an annual basis and carefully monitors enrollment projections against capacity needs. If legally supportable, the District requests its local jurisdictions to collect impact fees on behalf of the District.

The impact fees requested in this year's Capital Facilities Plan are based on growth related construction projects, including: the new Ruby Bridges Elementary School capacity (500); the added capacity project at Skyview Middle School (321) and Canyon Creek Elementary (336); constructing a 700 student middle school at the Ruby Bridges Elementary School property; the addition of instructional space and capacity (100) at Inglemoor High School; and the newly acquired land and commercial building that is being adapted for reuse as the Innovation Lab High School (housing 550 high school students).

**Proposed School Impact Fees  
King County, cities of Bothell, Kenmore, Woodinville**

Single Family Units	\$17,080
Multi-Family Units	\$1,504

**Proposed School Impact Fees  
Snohomish County**

Single Family Units	\$17,080
Multi-Family Units 1 bedroom/less	\$0^
Multi-Family Units 2+ Bedroom	\$1,504

*\*School impact fee rates stated above reflect a discount of 50% as required by the King County and Snohomish County codes.*

*^The District is not requesting that Snohomish County adopt a MF 1 bedroom/less fee on its behalf.*



## FACTORS FOR IMPACT FEE CALCULATIONS

### Student Generation Factors – Single Family

Elementary	.328
Middle	.108
High	.101

### Student Generation Factors – Multi Family

Elementary	.052
Middle	.019
High	.014

### Projected New Capacity

Ruby Bridges ES - 500
Canyon Creek ES (add) – 336
Skyview MS (add) – 321
Maltby Site Phase II - 700
Inglemoor HS (add) – 100
Innovation Lab HS – 550

### Capacity Costs (construction cost)

Ruby Bridges ES - \$56,544,993
Canyon Creek ES/Skyview MS - \$40,737,639
New Middle School - \$62,123,849
Inglemoor HS - \$10,369,215
Innovation Lab HS - \$13,200,000

### Permanent Facility Square Footage

94.55%

### Temporary Facility Square Footage

5.45%

### Property Costs – New Capacity

RBES/New MS – 33.23 acres	Cost/Acre - \$175,758
Innovation Lab HS – 5.92 acres	Cost/Acre - \$3,108,108

### Temporary Facility Capacity

Capacity/Cost  
(Portable costs not included in formula)

### School Construction Assistance Program Credit

Current SCAP Percentage	44.18%
Qualifying Project(s): Inglemoor HS addition	
Current Construction Cost Allocation	238.22
OSPI SqFt/Student	
ES - 90	
MS - 108	
HS – 130	

### Tax Payment Credit

Single Family Unit AAV	\$736,802
Multi-Family Unit AAV	\$295,238

### Debt Service Rate

Current/\$1,000	\$1.57
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### GO Bond Interest Rate – Bond Buyer Index

Avg – Feb. 2020	2.44%
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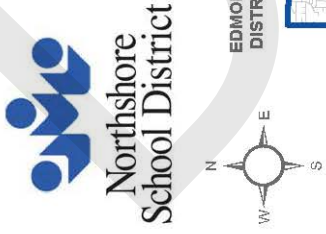
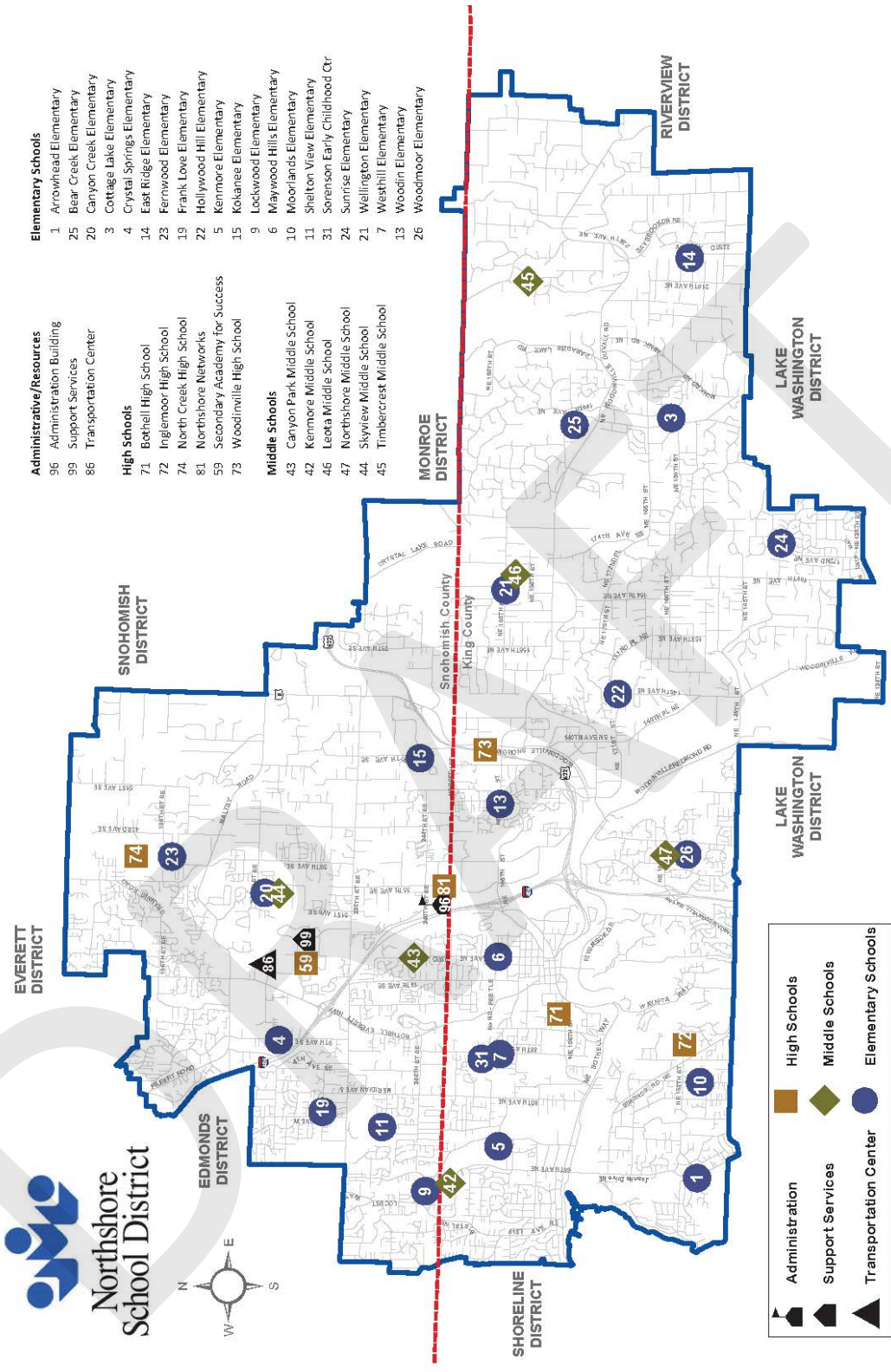
### Developer Provided Sites/Facilities

None

APPENDIX A  
District Map 2019-2020

- 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

- Administrative/Resources**
- 96 Administration Building
  - 99 Support Services
  - 86 Transportation Center
- High Schools**
- 71 Bethell High School
  - 72 Inglesmoor High School
  - 74 North Creek High School
  - 81 Northshore Networks
  - 59 Secondary Academy for Success
  - 73 Woodinville High School
- Middle Schools**
- 43 Canyon Park Middle School
  - 42 Kenmore Middle School
  - 46 Leota Middle School
  - 47 Northshore Middle School
  - 44 Skyview Middle School
  - 45 Timbercrest Middle School



	Administration		High Schools
	Support Services		Middle Schools
	Transportation Center		Elementary Schools

APPENDIX B  
New Development Student Generation

**NSD Student Generation Summaries**

Permit Years: 2015 - 2019

**Permitted Units Districtwide**

	Total Units***	Single Family Units - Students Generated	
Single Family	3088	1656	<b>0.536</b>
Multi-Family	1658	139	<b>0.084</b>

**Single Family Student Generation Rates by Grade**

GRADE		MF Units Students Generated**	
K		176	0.057
1		194	0.063
2		189	0.061
3		169	0.055
4		146	0.047
5		139	0.045
6		110	0.036
7		119	0.039
8		103	0.033
9		94	0.030
10		93	0.030
11		72	0.023
12		52	0.017
<b>Total</b>		<b>1656</b>	<b>0.536</b>

Single Family

Level	Rate
K-5	0.328
6-8	0.108
9-12	0.101
<b>Total</b>	<b>0.536</b>

**Multi-Family Student Generation Rates by Grade**

GRADE		Multi-Family Units - Students Generated	
K		11	0.007
1		12	0.007
2		19	0.011
3		21	0.013
4		11	0.007
5		12	0.007
6		10	0.006
7		10	0.006
8		11	0.007
9		4	0.002
10		8	0.005
11		8	0.005
12		2	0.001
<b>Total</b>		<b>139</b>	<b>0.084</b>

Multi-Family

Level	Rate
K-5	0.052
6-8	0.019
9-12	0.014
<b>Total</b>	<b>0.084</b>

**School Impact Fee Calculation - Single Family Dwelling Unit  
Northshore School District 2020 CFP**

School Site Acquisition Cost:

	<u>Site Size Acreage</u>	<u>Cost/ Acre</u>	<u>Facility Size</u>	<u>Site Cost/ Student</u>	<u>Student Factor</u>	<u>Cost/ SFDU</u>
Elementary	13	\$175,758	500	\$4,570	0.3280	\$1,499
Middle	20	\$175,758	700	\$5,022	0.1080	\$542
Senior	5.92	\$3,108,108	550	\$33,455	0.1010	\$3,379
					<b>TOTAL</b>	<b>\$5,420</b>

School Construction Cost:

	<u>Sq. Ft. % Permanent</u>	<u>Facility Cost</u>	<u>Facility Size</u>	<u>Bldg. Cost/ Student</u>	<u>Student Factor</u>	<u>Cost/ SFDU</u>
Elementary	94.55%	\$76,913,812	836	\$92,002	0.3280	\$28,532
Middle	94.55%	\$82,492,669	1021	\$80,796	0.1080	\$8,250
Senior	94.55%	\$23,569,215	650	\$36,260	0.1010	\$3,463
					<b>TOTAL</b>	<b>\$40,245</b>

Temporary Facility Cost:

	<u>Sq. Ft. % Temporary</u>	<u>Facility Cost</u>	<u>Facility Size</u>	<u>Bldg. Cost/ Student</u>	<u>Student Factor</u>	<u>Cost/ SFDU</u>
Elementary	5.45%	\$0	25	\$0	0.3280	\$0
Middle	5.45%	\$0	25	\$0	0.1080	\$0
Senior	5.45%	\$0	25	\$0	0.1010	\$0
					<b>TOTAL</b>	<b>\$0</b>

State School Construction Funding Assistance Credit:

	<u>Const Cost Allocation</u>	<u>OSPI Sq. Ft./ Student</u>	<u>Funding Assistance</u>	<u>Credit/ Student</u>	<u>Student Factor</u>	<u>Cost/ SFDU</u>
Elementary	238.22	90.0	0.00%	\$0	0.3280	\$0
Middle	238.22	108.0	0.00%	\$0	0.1080	\$0
Senior	238.22	130.0	44.18%	\$13,682	0.1010	\$1,382
					<b>TOTAL</b>	<b>\$1,382</b>

**School Impact Fee Calculation - Single Family Dwelling Unit**  
**Northshore School District 2020 CFP**

Tax Payment Credit Calculation:

Average SFR Assessed Value	\$736,802
Current Capital Levy Rate/\$1000	\$1.57
Annual Tax Payment	\$1,153.10
Years Amortized	10
Current Bond Interest Rate	2.44%
 Present Value of Revenue Stream	 \$10,123

Impact Fee Summary - Single Family Dwelling Unit:

Site Acquisition Cost	\$5,420
Permanent Facility Cost	\$40,245
Temporary Facility Cost	\$0
State SCFA Credit	(\$1,382)
Tax Payment Credit	(\$10,123)
 Unfunded Need	 \$34,160
 50% Required Adjustment	 \$17,080
 <b>Single Family Impact Fee</b>	 <b>\$17,080</b>

## APPENDIX C

### School Impact Fee Calculation - Multi-Family Dwelling Unit Northshore School District 2020 CFP

School Site Acquisition Cost:

	<u>Site Size Acreage</u>	<u>Cost/ Acre</u>	<u>Facility Size</u>	<u>Site Cost/ Student</u>	<u>Student Factor</u>	<u>Cost/ MFDU</u>
Elementary	13	\$175,758	500	\$4,570	0.0520	\$238
Middle	20	\$175,758	700	\$5,022	0.0190	\$95
Senior	5.92	\$3,108,108	550	\$33,455	0.0140	\$468
					TOTAL	\$801

School Construction Cost:

	<u>Sq. Ft. % Permanent</u>	<u>Facility Cost</u>	<u>Facility Size</u>	<u>Bldg. Cost/ Student</u>	<u>Student Factor</u>	<u>Cost/ MFDU</u>
Elementary	94.55%	\$76,913,812	836	\$92,002	0.0520	\$4,523
Middle	94.55%	\$82,492,669	1021	\$80,796	0.0190	\$1,451
Senior	94.55%	\$23,569,215	650	\$36,260	0.0140	\$480
					TOTAL	\$6,455

Temporary Facility Cost:

	<u>Sq. Ft. % Temporary</u>	<u>Facility Cost</u>	<u>Facility Size</u>	<u>Bldg. Cost/ Student</u>	<u>Student Factor</u>	<u>Cost/ MFDU</u>
Elementary	5.45%	\$0	25	\$0	0.0520	\$0
Middle	5.45%	\$0	25	\$0	0.0190	\$0
Senior	5.45%	\$0	25	\$0	0.0140	\$0
					TOTAL	\$0

State School Construction Funding Assistance Credit:

	<u>Const Cost Allocation</u>	<u>OSPI Sq. Ft./ Student</u>	<u>Funding Assistance</u>	<u>Credit/ Student</u>	<u>Student Factor</u>	<u>Cost/ MFDU</u>
Elementary	238.22	90.0	0.00%	\$0	0.0520	\$0
Middle	238.22	108.0	0.00%	\$0	0.0190	\$0
Senior	238.22	130.0	44.18%	\$13,682	0.0140	\$192
					TOTAL	\$192

School Impact Fee Calculation - Multi-Family Dwelling Unit  
Northshore School District 2020 CFP

Tax Payment Credit Calculation:

Average MFR Assessed Value	\$295,238
Current Capital Levy Rate/\$1000	\$1.57
Annual Tax Payment	\$462.05
Years Amortized	10
Current Bond Interest Rate	2.44%
Present Value of Revenue Stream	\$4,056

Impact Fee Summary - Multi-Family Dwelling Unit:

Site Acquisition Cost	\$801
Permanent Facility Cost	\$6,455
Temporary Facility Cost	\$0
State SCFA Credit	(\$192)
Tax Payment Credit	(\$4,056)
Unfunded Need	\$3,008
50% Required Adjustment	\$1,504
<b>Multi-Family Impact Fee</b>	<b>\$1,504</b>

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**Snohomish School District**

1601 Avenue D  
Snohomish, Washington 92890  
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**CAPITAL FACILITIES PLAN**  
**2020 – 2025**

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**Adopted**  
**July 22, 2020**



## **Snohomish School District**

# **CAPITAL FACILITIES PLAN**

### **Board of Directors**

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For information on the Snohomish School District Facilities Plan,  
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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 2020-2025.

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 2018 GMA-based CFP that was adopted by the District and the County in 2018.

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.
- If impact fees are requested, 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. In the event that impact fees are not available due to action by the state, county or cities within the District, the District in a future CFP update must identify alternative funding sources to replace the intended impact fee funding.
- The methodology used to calculate impact fees 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 9,585<sup>1</sup> students in kindergarten through grade 12. The City of Snohomish has a population of approximately 10,185<sup>2</sup> people while the County encompasses a larger population of approximately 818,700<sup>3</sup> 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 replacement 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. All of these projects are now complete.

The District convened a Citizens’ Facility Advisory Committee (CFAC) in 2019 to review the conditions of our school buildings, explore demographic and enrollment projections and prioritize needs. Based on this information, the CFAC recommended, and the Board authorized for the February 2020 ballot, a \$470 million bond proposal to fund six elementary school replacement

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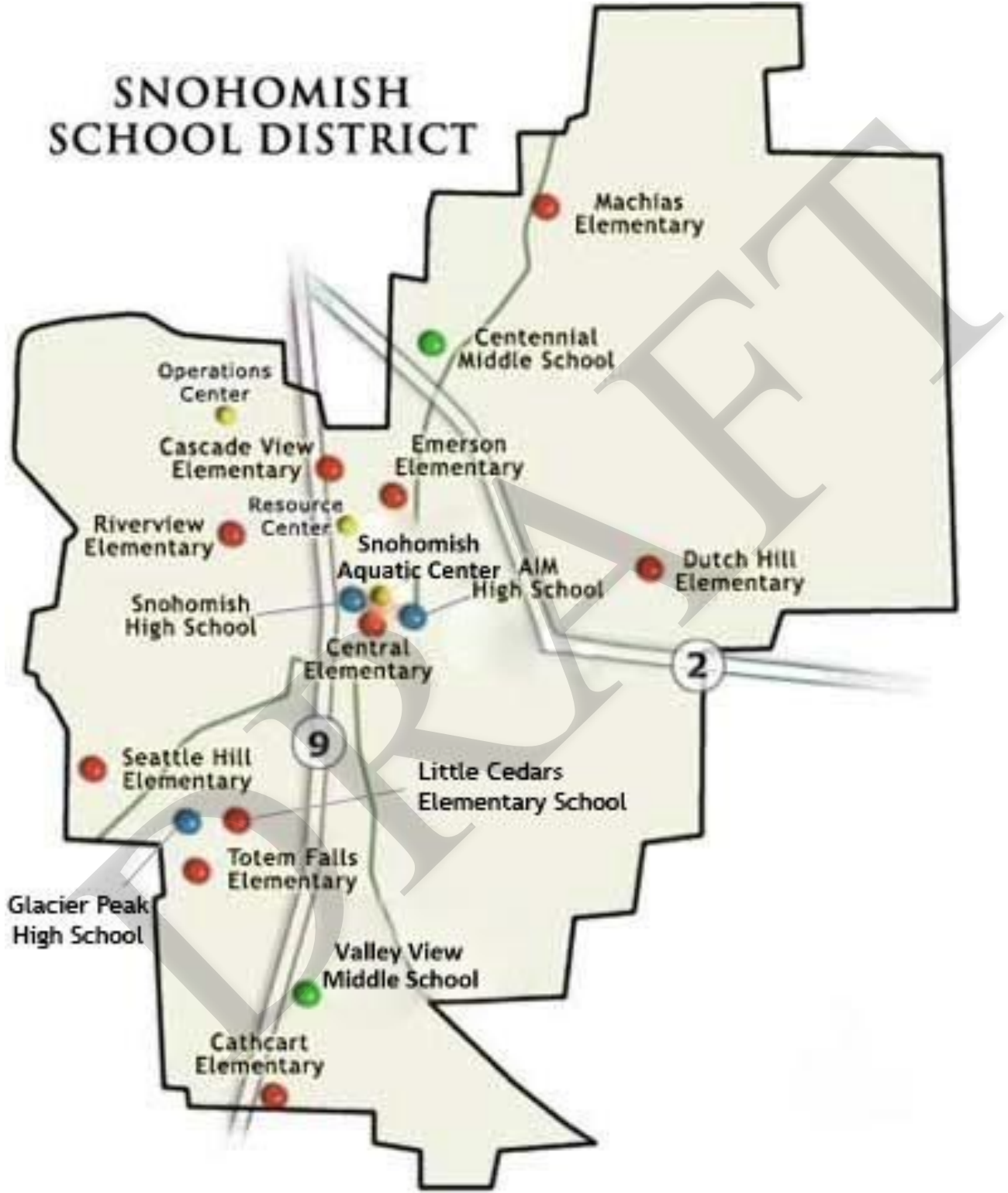
<sup>1</sup> October 1, 2019 FTE. Unless otherwise noted, all enrollment and student capacity data in this CFP is expressed in terms of FTE (full time equivalent).

<sup>2</sup> 2018 United States Census Bureau data

<sup>3</sup> 2035 GMA Population Forecasts by School District (Reconciled Population Forecast) Snohomish County General Policy Plan, Appendix B (adopted October 12, 2016).

projects (including adding capacity), added classrooms at Glacier Peak High School to reduce portable reliance, an early learning center at the existing Central Primary Center facility, and improvements at the Parkway Campus as well as the District's maintenance and transportation facilities. The bond also proposed safety and security improvements throughout the District. The District failed to achieve the required 60% margin for bond approval. The District's Board of Directors is considering options for a subsequent bond proposal but has not made any decisions relative to the six year planning period of this CFP. However, the capacity needs remain, as reflected in this CFP. The District will update the CFP as needed, including consideration of an interim update, to reflect updated planning decisions.

**FIGURE 1  
MAP OF DISTRICT<sup>1</sup>**



<sup>1</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 sought to construct the new facilities.

The State Legislature's implementation of requirements for full-day kindergarten and reduced K-3 class size impact school capacity and educational program standards. The District implemented full-day kindergarten in 2018 at all elementary schools. The District has also reduced K-3 class sizes in accordance with state funding and has therefore adjusted educational program standards and school capacity inventory as necessary.

### **Facility Standards for Elementary Schools:**

- The facility standard for grades K-3 is 18 students per classroom. For grades 4-6, the facility standard is 27 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)
- 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 may 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, manufacturing, biotechnology, CAD)
  - 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. The foregoing average class sizes set forth the District's "minimum level of service." 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.

For the school years of 2017-18 and 2018-19, the District’s compliance with the minimum educational service standards (as applicable for those years) is as follows:

2017-18 School Year						
LOS Standard	<b>MINIMUM LOS# Elementary</b>	<b>REPORTED LOS Elementary</b>	<b>MINIMUM LOS Middle</b>	<b>REPORTED LOS Middle</b>	<b>MINIMUM LOS High</b>	<b>REPORTED LOS High</b>
*Snohomish No. 201	35	22.3	35	26.2	40	24.6

2018-19 School Year						
LOS Standard	<b>MINIMUM LOS# Elementary</b>	<b>REPORTED LOS Elementary</b>	<b>MINIMUM LOS Middle</b>	<b>REPORTED LOS Middle</b>	<b>MINIMUM LOS High</b>	<b>REPORTED LOS High</b>
*Snohomish No. 201	35	21.9	35	24.3	40	26.1

\*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 renovated and expanded in 2011 and 2012. The District had 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 it has been 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	18	359	413	1990	yes
Cathcart	12.8	36,231	19	420	474	1994	yes
Central Primary	4.5	45,239	10	204	204	1994	yes
Dutch Hill	13.9	42,357	24	356	626	1985	yes
Emerson	6.9	40,038	13	375	375	1989	yes
Little Cedars	11.3	76,071	31	621	711	2007	yes
Machias	9.2	78,137	23	481	526	2011	yes
Riverview	9.6	78,740	25	515	542	2011	no
Seattle Hill	9.7	42,357	29	405	666	1982	yes
Totem Falls	10.0	44,877	18	376	376	1991	yes
<b>Total</b>		<b>529,676</b>		<b>4,112</b>	<b>4,913</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**

<b>Middle School</b>	<b>Site Size (acres)</b>	<b>Bldg Area (Sq. Ft.)</b>	<b>Teaching Stations(1)</b>	<b>Permanent Capacity (2)</b>	<b>Capacity with Portables</b>	<b>Year Built or Last Remodel</b>	<b>Potential for Expansion of Perm. Facility (3)</b>
Centennial	19.3	123,744	45	900	900	2011	yes
Valley View	38.6	168,725	45	950	950	2012	yes
<b>Total</b>		<b>292,469</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**

<b>High School</b>	<b>Site Size (acres)</b>	<b>Bldg Area (Sq. Ft.)</b>	<b>Teaching Stations (1)</b>	<b>Permanent Capacity (2)</b>	<b>Capacity with Portables</b>	<b>Year Built or Last Remodel</b>	<b>Potential for Expansion of Perm. Facility (3)</b>
Snohomish H.S.	28.6	270,089	74	1,800	1,800	2012	No
Glacier Peak H.S.	50.9	245,229	74	1,500	1,692	2008	Yes
AIM Alternative(4)	3.25	13,873		100	100	2008	No
<b>Total</b>		<b>529,161</b>		<b>3,400</b>	<b>3,592</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 and the transition programs. 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 68 portables at various sites throughout the District. The number of portables and their capacities are summarized in Table 4.

School Name	Table 4 Portables		Capacity
	Portables Classrooms	Portables Other	
<b>ELEMENTARY:</b>			
Cascade View	2	3	54
Cathcart	2	4	54
Central Primary	0	2	0
Dutch Hill	10	1	270
Emerson		4	0
Machias	2		45
Riverview	1	3	27
Seattle Hill	10	3	261
Totem Falls	0	6	0
Little Cedars	5	2	90
<b>Total</b>	<b>32</b>	<b>28</b>	<b>801</b>
<b>MIDDLE:</b>			
Centennial	0	0	0
Valley View	0	0	0
<b>Total</b>	<b>0</b>	<b>0</b>	<b>0</b>
<b>HIGH</b>			
Snohomish	0	0	0
Glacier Peak	8	0	192
<b>Total</b>	<b>8</b>	<b>0</b>	<b>192</b>
<b>GRAND TOTAL</b>	<b>40</b>	<b>28</b>	<b>993</b>

*Each portable classroom is 896 square feet.*

*The District portables identified in Table 4 have adequate useful remaining life and are evaluated regularly.*

## 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	6.3
Resource and Service Center	22,296	6.0
Parkway Campus District	9,536*	3.25
Warehouse	3,936	**
Aquatic Center	52,023	21.0

*\*Does not include education-related square footage.*

*\*\*Located on the same site as Cathcart Elementary School.*

## Land

The District currently owns two undeveloped sites. The District owns 15 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 23 acres behind Valley View Middle School. The 23 acre site has topography concerns and accessibility issues that could limit the District's ability to use the property as an additional school site.

## Leased Facilities

The District currently does not lease any facilities.

## **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 then grew steadily and peaked in 2016. Since 2016, enrollment has declined slightly. Overall, the District anticipates that, based upon cohort survival projections, future enrollments will slightly decline over the next six years. That enrollment decline is centered on secondary students. Elementary students will see an increase over the same six year period.

The October 1, 2019 FTE enrollment was 9,585. See Appendix A-1. 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, modifying the projections based on 2 year, 3 year, or 5 year historical averages and known developments.

Using the modified cohort survival projections, a total enrollment of 9,393 (FTE) is expected in 2025. See Appendix A-2. In other words, the District expects the enrollment of 192 fewer students between 2019 and 2025. *See* Table 6.

OFM population-based enrollment projections were estimated for the District using OFM population forecasts for the County. Between 2000 and 2019, the District's enrollment constituted approximately 17.63% of the District's total population. Assuming that, between 2020 and 2025, the District's enrollment will continue to constitute 17.63% of the District's population, using OFM/County data, the District projects a total enrollment of 10,623 students in 2025. *See* Table 6.



<b>Table 6</b>									
<b>Comparison of Student Enrollment FTE Projections 2019-2025</b>									
<b>Projection</b>	<b>October 2019*</b>	<b>2020</b>	<b>2021</b>	<b>2022</b>	<b>2023</b>	<b>2024</b>	<b>2025</b>	<b>Projected Change 2019-2025</b>	<b>Percent Change 2019-2025</b>
County/OFM**	9,585	9,758	9,931	10,104	10,277	10,450	10,623	1,038	10.83%
District	9,585	9,537	9,497	9,448	9,436	9,436	9,393	(192)	(2.00%)
Total Population Projection for District (OFM)							60,256		
Student to Population Ratio	17.63%								

\*Actual Oct 2019 FTE

\*\*Based on 2035 GMA Population Forecasts by School District (Reconciled Population Forecast) Snohomish County General Policy Plan, Appendix B (adopted October 12, 2016).

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 2025 school year are highly speculative. Using OFM/County data as a base, the District projects a 2035 student population of 11,193. This assumes that the District's enrollment will continue to constitute 17.63% 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 2019	Projected Enrollment 2035**
Elementary (K-6)	4,763	5,562
Middle School (7-8)	1,542	1,801
High School (9-12)	3,280	3,830
<b>TOTAL (K-12)</b>	<b>9,585</b>	<b>11,193</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 2019 and 2035.

## SECTION 5: CAPITAL FACILITIES NEEDS

### Facility Needs (2020-2025)

#### 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 (2020-2025).

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 (if applicable, see Table 11).

Projected future capacity needs are depicted on Table 8 and are derived by applying the District’s modified cohort projected enrollment to the capacity existing in 2019. This table shows actual space needs and the portion of those needs that are “growth related” for the years 2020-2025. Importantly, capacity needs existing as of the 2019 base year include impacts from recent growth within the District and should also be considered as growth-related.

**Table 8  
Additional Capacity Needs  
2020-2025**

Grade Span	2019*	2020	2021	2022	2023	2024	2025	Pct. Growth Related
<b>Elementary (K-6)</b>								
Total	651**	659	663	683	693	745	767	
Growth Related		8	12	32	42	94	116	15%
<b>Middle School (7-8)</b>								
Total	---	---	---	---	---	---	---	
Growth Related	--	--	--	--	--	--	--	--%
<b>High School</b>								
Total	---	---	---	---	---	---	---	
Growth Related	--	--	--	--	--	--	--	--%

\* Actual 2019 FTE Enrollment

\*\*Represents capacity needs (including those related to recent growth) 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 (2025-2026), additional permanent classroom capacity will be needed as follows:

**Table 9**  
**Estimated Unhoused Students (2025-2026)\***

<b>Grade Span</b>	<b>Unhoused Students (Post-2019 Growth Related)</b>	<b>Unhoused Students (Pre-2019 Existing and Recent-Growth Related)</b>
Elementary (K-6)	116	767
Middle School (7-8)	--	--
High School (9-12)	--	--
<b>TOTAL UNHOUSED (K-12)</b>	116	767

\*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.

### **Recent and Planned Improvements**

To accommodate growth in previous years, the District constructed and opened in 2007 a new elementary school and constructed a second high school, Glacier Peak, which opened in 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 it to house its AIM Alternative High School and Transition programs and the Parent Partnership Program.

The District convened a Citizens’ Facility Advisory Committee (CFAC) in 2019 to review the conditions of our school buildings, explore demographic and enrollment projections and prioritize needs. Based on this information, the CFAC recommended, and the Board authorized for the February 2020 ballot, a \$470 million bond proposal to fund six elementary school replacement projects (including adding capacity), added classrooms at Glacier Peak High School to reduce portable reliance, an early learning center at the existing Central Primary Center facility, and improvements at the Parkway Campus as well as the District’s maintenance and transportation facilities. The bond also proposed safety and security improvements throughout the District. The District failed to achieve the required 60% margin for bond approval.

The District, in view of current and anticipated capacity needs, is continuing to plan for elementary capacity additions during the six-year planning period and beyond. The District may also purchase and site new portable facilities to address capacity needs.

### **Elementary Schools**

The District 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 are complete and the capacity of the two schools was expanded from 481 and 515 respectively to 600 each. These schools opened at the new capacity in January of 2011.

This CFP includes planning for classroom additions as a part of replacement projects at four elementary schools (Cascade View, Cathcart, Dutch Hill, and Seattle Hill) to address growth-related needs. In addition, replacement/addition projects at two additional elementary schools (Emerson and Totem Falls) are planned just outside of the six year planning period. The replacement/addition projects are subject to funding secured through a future capital bond, all contingent on future action by the Board of Directors and ultimately the voters.

### **Middle Schools**

To address overcrowding at the middle school level, the District constructed a new-in-lieu Valley View Middle School to house 950 students and modernized and enlarged Centennial Middle School to house 900 students. Centennial opened in 2011 and Valley View opened in fall 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 three portables were added (total of six classrooms) at Glacier Peak. In 2017, an additional portable (two classrooms) was added at Glacier Peak.

This CFP includes a planned addition at Glacier Peak High School, which is also subject to future bond approval. Based upon the District's current enrollment projections, this project will not be eligible for school impact fee funding.

### **Interim Classroom Facilities**

The District may purchase portables as needed to address growth-related needs (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.

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.

The District's voters considered in February 2020 but did not approve a \$470 million bond proposal to fund six elementary school replacement projects (including adding capacity), added classrooms at Glacier Peak High School to reduce portable reliance, an early learning center at the existing Central Primary Center facility, and improvements at the Parkway Campus as well as the District's maintenance and transportation facilities. The bond also proposed safety and security improvements throughout the District.

## **State School Construction Assistance**

State School Construction Assistance funds come from the Common School Construction Fund. The State deposits revenue from the sale of renewable resources from State school lands set aside by the Enabling Act of 1889 into the Common School Account. If these sources are insufficient to meet needs, the Legislature can appropriate General Obligation Bond funds or the Superintendent of Public Instruction can prioritize projects for funding. School districts may qualify for State School Construction Assistance funds for specific capital projects based on a prioritization system. For eligible projects, the District's funding level under the State School Construction Assistance fund is at the 57.46% percentage level (July 2020 release).

## **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 2020-2025. 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, the District's CFP plans for classroom additions at four elementary schools and a classroom addition at Glacier Peak High School, all subject to future funding approval. The District will update this CFP, including a potential interim update, to reflect relevant planning decisions. The District anticipates also purchasing portable facilities to address growth-related capacity needs.

**Table 10**  
**Finance Plan**  
(dollars in 1,000s)

	2020	2021	2022	2023	2024	2025	Total Cost*	Bond/Levy/ Impact Fee	State Match	Other	Added Capacity	Growth Related
Cathcart Elementary Replacement/Addition				\$38,900	\$30,000		\$68,900	X	X		X	X
Dutch Hill Elementary Replacement/Addition				\$40,000	\$32,000		\$72,000	X	X		X	X
Cascade View Elementary Replacement/Addition				\$39,000	\$29,600		\$68,600	X	X		X	X
Seattle Hill Elementary Replacement				\$39,000	\$30,000		\$69,000	X	X		X	X
Glacier Peak Classroom Addition						\$10,100	\$10,100	X			X	
District wide Capital Improvements (including portables)	\$300	\$300	\$300	\$300	\$300	\$300	\$1,800	X			X	X
Technology	\$4,600	\$4,800	\$5,000	\$5,200	\$5,400	\$5,600	\$30,600	X				

\*Reflects total projects costs using 2020 estimates, subject to escalation. The impact fees are calculated based on construction costs only with anticipated escalation. Construction costs for the impact fee calculation reflect average construction costs of the four elementary school capacity projects.



**Table 11**  
**Projected Student Capacity**  
**2020-2025**  
**(Includes Programmed Improvements)**

**Elementary School Surplus/Deficiency**

	2019	2020	2021	2022	2023	2024	2025
Existing Capacity <sup>1</sup>	4,112	4,112	4,112	4,112	4,112	4,112	4,972
Added Capacity						860 <sup>^</sup>	
Enrollment <sup>2</sup>	4,763	4,771	4,775	4,795	4,805	4,857	4,879
Surplus (Deficiency)	(651)	(659)	(663)	(683)	(693)	115	93

<sup>^</sup>Capacity additions resulting from replacement and expansion of Cascade View, Cathcart, Dutch Hill, and Seattle Hill Elementary Schools

**Middle School Surplus/Deficiency**

	2019	2020	2021	2022	2023	2024	2025
Existing Capacity	1,850	1,850	1,850	1,850	1,850	1,850	1,850
Added Capacity							
Enrollment	1,542	1,549	1,500	1,474	1,461	1,435	1,429
Surplus (Deficiency)	308	301	350	376	389	415	421

**High School Surplus/Deficiency**

	2019	2020	2021	2022	2023	2024	2025
Existing Capacity*	3,400	3,400	3,400	3,400	3,400	3,400	3,400
Added Capacity							265 <sup>^</sup>
Enrollment	3,280	3,217	3,221	3,180	3,170	3,145	3,085
Surplus (Deficiency)	120	183	179	220	230	255	580

<sup>^</sup>Classroom addition at Glacier Peak High School

<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, as applicable, purchase land for school sites, make site improvements, construct schools, and purchase/install relocatable facilities that add interim capacity needed to serve new development. A student factor (or student generation rate) is used to identify the average cost per dwelling unit by measuring the average number of students generated by each housing type (single-family dwellings and multi-family dwellings of one bedroom and two bedrooms or more). A description of the student methodology is contained in Appendix B. As required under the GMA, credits are applied in the formula to account for State School Construction Assistance funds expected to be reimbursed to the District and projected future property taxes to be paid by the dwelling unit toward a capital levy/bond that would fund the capacity improvements. 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’s school impact fees are calculated to include the elementary capacity additions identified in this 2020 CFP update. See discussion in Sections 5 and 6 above.

**Proposed Snohomish School District Impact Fee Schedule**

Using the variables on the following page and formula described above, impact fees proposed for the District are summarized in Table 12. See also Appendix C.

**Table 12**  
**School Impact Fees**  
**2020**

<b>Housing Type</b>	<b>Impact Fee Per Dwelling Unit</b>
Single Family	\$6,039
Multi-Family (1 Bedroom)	\$0
Multi-Family (2+ Bedroom)	\$260

*\*Table 12 reflects a 50% adjustment to the calculated fee as required by local ordinances.*



APPENDIX A

POPULATION AND ENROLLMENT DATA

**Table A-1**

**HISTORICAL STUDENT ENROLLMENT 2012-2019  
ACTUAL ENROLLMENTS ON OCTOBER 1st\***

GRADES	2012	2013	2014	2015	2016	2017	2018	2019
K	310	305	307	406	631	605	633	657
1 <sup>st</sup> Grade	593	671	641	625	622	648	623	646
2 <sup>nd</sup> Grade	697	620	682	669	652	647	665	624
3 <sup>rd</sup> Grade	665	728	619	731	708	696	676	692
4 <sup>th</sup> Grade	738	694	748	653	743	728	706	690
5 <sup>th</sup> Grade	705	760	694	751	675	762	725	718
6 <sup>th</sup> Grade	733	698	791	727	772	713	781	736
7 <sup>th</sup> Grade	792	759	743	799	756	784	724	794
8 <sup>th</sup> Grade	819	816	773	769	826	766	776	748
9 <sup>th</sup> Grade	848	921	943	885	869	890	882	842
10 <sup>th</sup> Grade	919	884	935	947	903	875	905	896
11 <sup>th</sup> Grade	833	899	833	838	836	818	782	790
12 <sup>th</sup> Grade	798	808	860	824	857	845	770	752
<b>Total Enrollment</b>	<b>9,445</b>	<b>9,563</b>	<b>9,569</b>	<b>9,622</b>	<b>9,850</b>	<b>9,777</b>	<b>9,648</b>	<b>9,585</b>

\* FTE enrollment.

**Table A-2**

**PROJECTED STUDENT ENROLLMENT (FTE) 2020-2025  
Based on Modified Cohort Survival\***

GRADES	ESTIMATE FTE** 2020-2021	ESTIMATE FTE 2021-2022	ESTIMATE FTE 2022-2023	ESTIMATE FTE 2023-2024	ESTIMATE FTE 2024-2025	ESTIMATE FTE 2025-2026
K	645	653	642	645	648	652
1 <sup>st</sup> Grade	678	662	671	659	662	665
2 <sup>nd</sup> Grade	658	688	672	680	669	672
3 <sup>rd</sup> Grade	655	687	718	702	711	699
4 <sup>th</sup> Grade	704	667	699	731	714	723
5 <sup>th</sup> Grade	697	709	671	704	736	719
6 <sup>th</sup> Grade	734	710	722	683	717	749
<b>K-6 Total</b>	<b>4,771</b>	<b>4,775</b>	<b>4,795</b>	<b>4,805</b>	<b>4,857</b>	<b>4,879</b>
7 <sup>th</sup> Grade	747	745	720	733	694	728
8 <sup>th</sup> Grade	802	755	753	723	741	701
<b>6-8 Total</b>	<b>1,549</b>	<b>1,500</b>	<b>1,474</b>	<b>1,461</b>	<b>1,435</b>	<b>1,429</b>
9 <sup>th</sup> Grade	829	889	837	835	807	821
10 <sup>th</sup> Grade	844	834	894	842	840	812
11 <sup>th</sup> Grade	787	744	735	788	742	741
12 <sup>th</sup> Grade	757	754	713	705	756	712
<b>9-12 Total</b>	<b>3,217</b>	<b>3,221</b>	<b>3,180</b>	<b>3,170</b>	<b>3,145</b>	<b>3,085</b>
<b>Total Enrollment</b>	<b>9,537</b>	<b>9,497</b>	<b>9,448</b>	<b>9,436</b>	<b>9,436</b>	<b>9,393</b>

\*See Section 4 for further details.

\*\*October 1 FTE

**Table A-3**  
**AVERAGE PERCENTAGE ENROLLMENT BY GRADE SPAN**  
 (Modified Cohort Enrollment Projections)

<b>Enrollment by Grade Span**</b>	<b>2019*</b>	<b>2020</b>	<b>2021</b>	<b>2022</b>	<b>2023</b>	<b>2024</b>	<b>2025</b>
Elementary (K-6)	4,763	4,771	4,775	4,795	4,805	4,857	4,879
Middle School (7-8)	1,542	1,549	1,500	1,474	1,461	1,435	1,429
High School (9-12)	3,279	3,217	3,221	3,180	3,170	3,145	3,085
<b>TOTAL</b>	<b>9,585</b>	<b>9,537</b>	<b>9,497</b>	<b>9,448</b>	<b>9,436</b>	<b>9,436</b>	<b>9,393</b>

<b>Percentage by Grade Span</b>	<b>2019</b>	<b>2020</b>	<b>2021</b>	<b>2022</b>	<b>2023</b>	<b>2024</b>	<b>2025</b>
Elementary (K-6)	50%	50%	50%	51%	51%	52%	52%
Middle School (78)	16%	16%	16%	16%	16%	15%	15%
High School (9-12)	34%	34%	34%	34%	34%	33%	33%
<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 2019 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>2019*</b>	<b>2020</b>	<b>2021</b>	<b>2022</b>	<b>2023</b>	<b>2024</b>	<b>2025</b>
Elementary (K-6)	4,763	4,879	4,966	5,153	5,139	5,434	5,524
Middle School (7-8)	1,609	1,561	1,589	1,617	1,644	1,568	1,593
High School (9-12)	3,213	3,318	3,376	3,434	3,494	3,448	3,506
<b>TOTAL**</b>	<b>9,585</b>	<b>9,758</b>	<b>9,931</b>	<b>10,104</b>	<b>10,277</b>	<b>10,450</b>	<b>10,623</b>

\*Actual October 2019 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**

3/20/2020

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 2012 through December 2018. 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 March 2020. 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 1,056 single family detached units were compared with data on 9,893 students registered in the District, and the following matches were found by grade level(s)\*:

GRADE(S)	COUNT OF MATCHES	CALCULATED RATE
K	63	0.060
1	51	0.048
2	44	0.042
3	50	0.047
4	47	0.045
5	57	0.054
6	39	0.037
7	44	0.042
8	31	0.029
9	36	0.034
10	33	0.031
11	29	0.027
12	30	0.028
K-6	351	0.332
7-8	75	0.071
9-12	128	0.121
K-12	554	0.525

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 78 multi-family 2+ BR units were compared with data on 9,893 students registered in the District, and the following matches were found by grade level(s)\*:

<b>GRADE(S)</b>	<b>COUNT OF MATCHES</b>	<b>CALCULATED RATE</b>
K	0	0.000
1	1	0.013
2	1	0.013
3	0	0.000
4	1	0.013
5	0	0.000
6	2	0.026
7	1	0.013
8	2	0.026
9	1	0.013
10	3	0.038
11	4	0.051
12	2	0.026
<b>K-6</b>	<b>5</b>	<b>0.064</b>
<b>7-8</b>	<b>3</b>	<b>0.038</b>
<b>9-12</b>	<b>10</b>	<b>0.128</b>
<b>K-12</b>	<b>18</b>	<b>0.231</b>

6. **Multi-Family 0-1 BR Rates:** Research indicated that 7 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 9,893 students registered in the District. No specific unit number matches were made.

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

	<b>K-6</b>	<b>7-8</b>	<b>9-12</b>	<b>K-12</b>
<b>Single Family</b>	.332	.071	.121	.525
<b>Multi-Family 2+ BR</b>	.064	.038	.128	.231

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

APPENDIX C

SCHOOL IMPACT FEE CALCULATIONS



Sultan School District # 311

# **Capital Facilities Plan**

*2020-2025*

Adopted: July 27, 2020

# Sultan School District No. 311

## Capital Facilities Plan

### 2020-2025

For Inclusion in the  
**Snohomish County Comprehensive Plan**

#### **BOARD OF DIRECTORS**

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*Ed Hussman*

*Kate Roesler*

*Russ Sumpter, Chair*

*Mike Varnell*

#### **SUPERINTENDENT**

*Dan Chaplik*

For information on the Sultan School District Facilities  
Plan contact the Superintendent's Office (360) 793-9800



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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 (2020-2025).

In accordance with the GMA, adopted County Policy, and adopted school impact fee ordinances of Snohomish County and the cities of Gold Bar and Sultan, the CFP contains the following required elements:

1. Future 6-year enrollment forecasts for each grade span (elementary, middle and high schools).
2. An inventory of existing capital facilities owned by the District showing the locations and capacities of the facilities.
3. A forecast of future needs for capital facilities and school sites.
4. The proposed capacities of expanded or new capital facilities.
5. 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.
6. A calculation of impact fees to be assessed and support data substantiating said fees (if applicable).

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

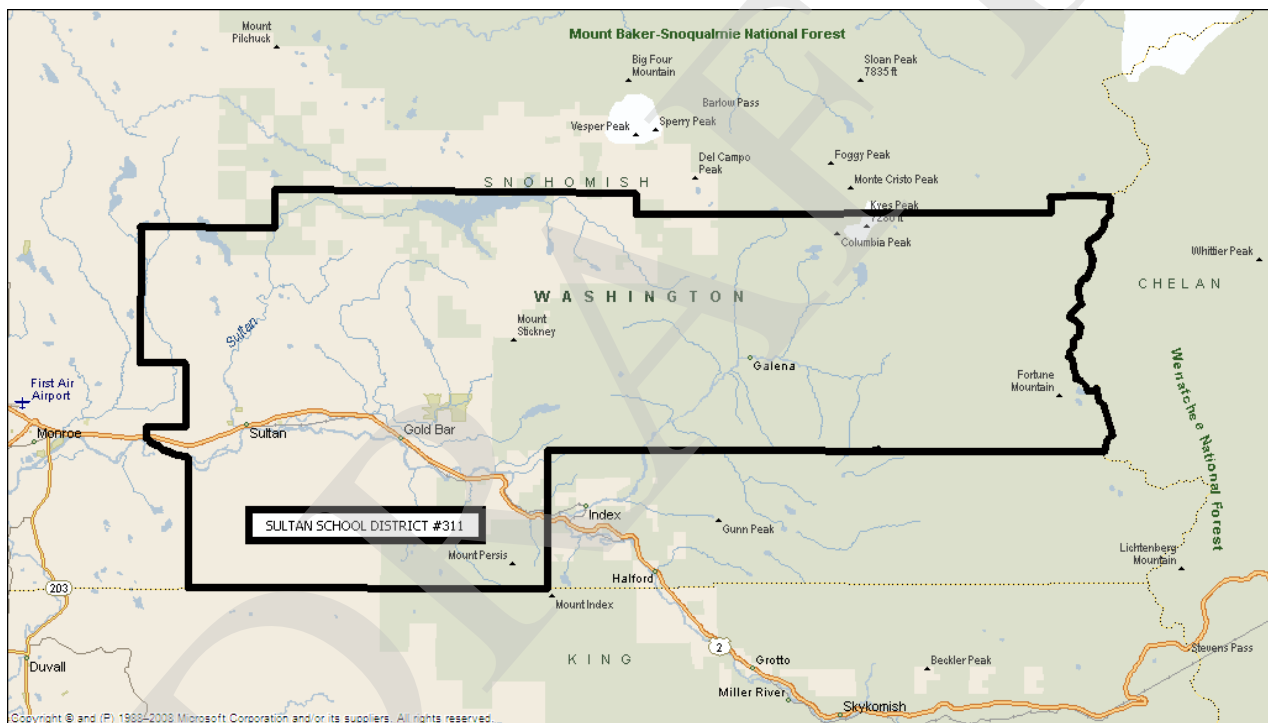
- ❖ Information was obtained from recognized sources, such as the WA State Office of Superintendent of Public Instruction (OSPI), U.S. Census, or other governmental report. School districts may generate their own data if it is derived through statistically reliable methodologies. Information is to be consistent with the Office of Financial Management (“OFM”) population forecasts and those of Snohomish County.
- ❖ 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 respective City/Cities.

Snohomish County’s Countywide Planning Policies direct jurisdictions in Snohomish County to “ensure the availability of sufficient land and services for future K-20 school needs.” Policy ED-11. The District appreciates any opportunity for cooperative planning efforts with its jurisdictions.

### ***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 high school program. The District serves a student population of approximately 1,981 (October 1, 2019 adjusted FTE enrollment) in all programs from kindergarten through twelfth grade, includes the cities of Sultan and Gold Bar as well as unincorporated rural areas of Snohomish County, and had an estimated population in 2019 of 14,522 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.



## **Section 2: Definitions**

**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 Sultan School District.

**Board** means the Board of Directors of Sultan School District No. 311 (“School Board”).

**Capital Facilities** means school facilities identified in the District’s CFP.

**Construction Cost Allocation** means the maximum cost per square foot of construction that the state will recognize. This amount is established by the legislature in the biennium budget. [Formerly referred to as the “Boeckh Index.”]

**Development Activity** means any residential construction, expansion of a building or structure, or any other change of building, structure or land that creates additional demand and need for school facilities by creating additional dwelling units. This excludes building permits for attached or detached accessory apartments, and remodeling or renovation permits which do not result in additional dwelling units.

**Development Approval** means any written authorization from the County and/or cities of Sultan or Gold Bar that authorizes the commencement of a residential development activity.

**District** means Sultan School District No. 311.

**District Property Tax Levy Rate** means the District’s current capital property tax rate for bonds 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, condominium, or duplex/townhome units, all as defined by local ordinance.

**Estimated Facility Construction Cost** means the projected 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.

**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. Sno-Isle Vocational School and college Running Start students are a reduced FTE since they do not attend Sultan High School for a full school day. For purposes of this Capital Facilities Plan, all other grades are considered to contain one FTE per student. Students enrolled in alternative learning experiences (virtual programs) that do not require use of regular school space are counted as an FTE, but not in the “headcount.”

**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.

**Headcount** total number of students enrolled in the District, regardless of their FTE status. The District must plan to accommodate this many students if they all attended school at the same time.

**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.

**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 incurred by the District for purchasing and installing portable classrooms.

**School Impact Fee** means a payment of money imposed on residential 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.

**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.

**State Funding Assistance Percentage** means the proportion of funds that are provided to the District for specific capital projects from the state's Common School Construction Fund.

**Student Factor [Student Generated 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 generated rate.

**Teaching Station** means a facility space (classroom) specifically dedicated to implementing the District's educational program and capable of accommodating at any one time a full class meeting the District's level of service for the particular grade.

**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.

## **Section 3: District Standard 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 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.

### ***Standard of Service for Elementary School Facilities***

- Class size for Kindergarten will not exceed an average of 17 students per classroom.
- Class size for 1-3 will not exceed an average of 17 students per classroom.
- Class size for grades 4-5 will not exceed an average of 25 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 and community use.
- 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 for some 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. We have targeted a utilization rate of 90% for grades K-5. Therefore, classroom capacity should be adjusted to reflect the use of one period per day for the aforementioned needs.
- 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.

### ***Standard of Service for Secondary School Facilities***

- Class size for grades 6-8 will not exceed an average of 25 students per classroom (except PE and Music).
- Class size for grades 9-12 will not exceed an average of 25 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 and community use.

- 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. 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 for some students.
- 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/Agricultural Classrooms (i.e., business, wood shop, wood technology, mechanics, metals, and greenhouse plants)
  - Program Specific Classrooms (i.e., music, art, physical education, computer labs, science labs, and business)

### ***District-wide Educational Programs***

Special programs offered by the District at specific school sites include:

- ❖ Special Educational Classes for Birth-Three
- ❖ Preschool for Special Needs Students
- ❖ Special Education Classes for K-12
- ❖ Extended Day Kindergarten
- ❖ Speech and Language Therapy
- ❖ Occupational Therapy
- ❖ Physical Therapy
- ❖ School Psychology
- ❖ Drug and Alcohol Intervention
- ❖ Title I / Learning Assistance Programs (LAP)
  - ⊕ Includes Read Naturally Curriculum
- ❖ Title III / Limited English Proficient (LEP)
- ❖ Bilingual Education for English Language Learners (ELL)
- ❖ Technology Education for Grades K-12
- ❖ Advancement Via Individual Determination (AVID)
- ❖ Science Technology Engineering & Math (STEM)
  - ⊕ Includes *Project Lead the Way* Curriculum
- ❖ Summer School / Extended School Year (ESY)
- ❖ Sno-Isle Vocational Skills Center (Cooperative School) for Grades 10-12
- ❖ Community College Running Start for Grades 11-12

- ❖ Vocational and Career Education Onsite for Grades 9-12
- ❖ Alternative Program for Grades 9-12

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.

### ***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. Portables are not intended to be a long-term capacity solution. The District regularly assesses the condition of its portables for continued educational program use.

### ***Minimum Level of Service (MLOS)***

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 Board of Directors following appropriate public review and comment.

The District's minimum level of service is as follows: on average, K-5 classrooms have no more than 28 students per classroom, 6-8 classrooms have no more than 30 students per classroom, and 9-12 classrooms have no more than 32 students per classroom. 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-5 classrooms have more than 28 students per classroom, 6-8 classrooms have more than 30 students per classroom, or 9-12 classrooms more than 32 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.



For the school years of 2017-18 and 2018-19, the District’s compliance with the minimum educational service standards was as follows:

**Table 1 Minimum Level of Service**

2017-18 School Year						
LOS Standard	<b>MINIMUM LOS# Elementary</b>	<b>REPORTED LOS Elementary</b>	<b>MINIMUM LOS Middle</b>	<b>REPORTED LOS Middle</b>	<b>MINIMUM LOS High</b>	<b>REPORTED LOS High</b>
	28	23.92	30	26.88	32	20.85

\* The District determines the reported service level by adding the reported average of FTE students at each grade level and dividing that number by the number of general education teaching stations (including portables).

2018-19 School Year						
LOS Standard	<b>MINIMUM LOS# Elementary</b>	<b>REPORTED LOS Elementary</b>	<b>MINIMUM LOS Middle</b>	<b>REPORTED LOS Middle</b>	<b>MINIMUM LOS High</b>	<b>REPORTED LOS High</b>
	28	23.21	30	27.53	32	20.19

\* The District determines the reported service level by adding the reported average of FTE students at each grade level and dividing that number by the number of general education teaching stations (including portables).

## **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).

#### ***Permanent Classrooms***

The District operates two elementary schools, one middle school, one high school, and an alternative high school for grades 9-12. Currently the elementary schools serve grades PreK-5, the middle school serves grades 6-8 and the high school serves grades 9-12. School capacity was determined based on the number of classrooms used as general education teaching stations at each school and the District's adopted standard of service. 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 permanent capacity inventory is summarized in Table 2. Teaching stations that are not available for regular classroom capacity are used as conference room space, computer STEM labs, special education programs, occupational therapy rooms, behavior modification rooms, and special needs pre-school 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 owns 42 portable classrooms throughout the District to provide additional interim classroom capacity in addition to housing programs to address diverse students (see Table 3). Of the 42 portables listed in inventory, 19 are used as general education classrooms. The other 23 are used for programmatic offerings such as the alternative high school program, computer labs, STEM labs, Title I, Occupational Therapy, Special Education, preschool, and PTA.

**Table 2 Permanent Classroom Capacity Inventory**

<b>Elementary School</b>	<b>Site Size (Acres)</b>	<b>Bldg Area (Square Feet)</b>	<b>Total Teaching Stations</b>	<b>Teaching Stations General Education</b>	<b>Student Classroom Capacity</b>
Sultan Elementary 501 Date Ave, Sultan	9.00	52,661 sf	25	22	431
Gold Bar Elementary 419 Lewis Ave, Gold Bar	10.22	33,723 sf	14	13	255
<b>TOTAL K-5</b>	<b>19.22</b>	<b>86,384 sf</b>	<b>39</b>	<b>35</b>	<b>686</b>

<b>Middle School</b>	<b>Site Size (Acres)</b>	<b>Bldg Area (Square Feet)</b>	<b>Total Teaching Stations</b>	<b>Teaching Stations General Education</b>	<b>Student Classroom Capacity</b>
Sultan Middle School 301 High Ave, Sultan	9.4	66,912 sf	20	16	480
<b>TOTAL 6-8</b>	<b>9.4</b>	<b>66,912 sf</b>	<b>20</b>	<b>16</b>	<b>480</b>

<b>High School</b>	<b>Site Size (Acres)</b>	<b>Bldg Area (Square Feet)</b>	<b>Total Teaching Stations</b>	<b>Teaching Stations General Education</b>	<b>Student Classroom Capacity</b>
Sultan High School 13715 310 <sup>th</sup> Ave SE, Sultan	35.0	71,876 sf	18	14	448
<b>TOTAL 9-12</b>	<b>35.0</b>	<b>71,876 sf</b>	<b>18</b>	<b>14</b>	<b>448</b>

<b>GRAND TOTAL</b>		<b>225,172 sf</b>	<b>77</b>	<b>65</b>	<b>1,614</b>
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**Table 3 Portable Classroom Capacity Inventory**

<b>Elementary School</b>	<b>Bldg Area (Square Feet)</b>	<b>Total Teaching Stations</b>	<b>Teaching Stations General Education</b>	<b>Student Classroom Capacity</b>
Sultan Elementary	10,776 sf	12	5	98
Gold Bar Elementary	10,768 sf	10	4	78
<b>TOTAL</b>	<b>21,544 sf</b>	<b>22</b>	<b>9</b>	<b>176</b>

<b>Middle School</b>	<b>Bldg Area (Square Feet)</b>	<b>Total Teaching Stations</b>	<b>Teaching Stations General Education</b>	<b>Student Classroom Capacity</b>
Sultan Middle School	3,592 sf	5	2	60
<b>TOTAL</b>	<b>3,592 sf</b>	<b>5</b>	<b>2</b>	<b>60</b>

<b>High School</b>	<b>Bldg Area (Square Feet)</b>	<b>Total Teaching Stations</b>	<b>Teaching Stations General Education</b>	<b>Student Classroom Capacity</b>
Sultan High School	13,476 sf	13	8	200
<b>TOTAL</b>	<b>13,476 sf</b>	<b>13</b>	<b>8</b>	<b>200</b>

<b>Alternative Program</b>	<b>Bldg Area (Square Feet)</b>	<b>Total Teaching Stations</b>	<b>Teaching Stations General Education</b>	<b>Student Classroom Capacity</b>
Sky Valley Option High School	1,792 sf	2	0	0
<b>TOTAL</b>	<b>1,792 sf</b>	<b>2</b>	<b>0</b>	<b>0</b>

<b>GRAND TOTAL</b>	<b>40,404 sf</b>	<b>42</b>	<b>19</b>	<b>436</b>
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**Table 4 Classroom Capacity – Permanent and Temporary Inventory  
Combined Total**

<b>Elementary School</b>	<b>Permanent/ Temporary (Square Feet)</b>	<b>Total Teaching Stations</b>	<b>Teaching Stations General Education</b>	<b>Total Maximum Student Capacity</b>
Sultan Elementary	63,437 sf	37	27	529
Gold Bar Elementary	44,491 sf	24	17	333
<b>TOTAL K-5</b>	<b>107,928 sf</b>	<b>61</b>	<b>44</b>	<b>862</b>

<b>Middle School</b>	<b>Permanent/ Temporary (Square Feet)</b>	<b>Total Teaching Stations</b>	<b>Teaching Stations General Education</b>	<b>Total Maximum Student Capacity</b>
Sultan Middle School	70,504 sf	25	18	540
<b>TOTAL 6-8</b>	<b>70,504 sf</b>	<b>25</b>	<b>18</b>	<b>540</b>

<b>High School</b>	<b>Permanent/ Temporary (Square Feet)</b>	<b>Total Teaching Stations</b>	<b>Teaching Stations General Education</b>	<b>Total Maximum Student Capacity</b>
Sultan High School	85,352 sf	31	22	648
<b>TOTAL 9-12</b>	<b>85,352 sf</b>	<b>31</b>	<b>22</b>	<b>648</b>

<b>Alternative Program</b>	<b>Permanent/ Temporary (Square Feet)</b>	<b>Total Teaching Stations</b>	<b>Teaching Stations General Education</b>	<b>Student Classroom Capacity</b>
Columbia Virtual Academy	1,792	2	0	0
<b>TOTAL</b>	<b>1,792</b>	<b>2</b>	<b>0</b>	<b>0</b>

<b>GRAND TOTAL</b>	<b>265,576 sf</b>	<b>119</b>	<b>84</b>	<b>2,050</b>
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### ***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 4.

**Table 5 Support Facility Inventory**

<b>Facility</b>	<b>Building Area (Square Feet)</b>
Administration	3,149
Bus Barn	7,200
<b>TOTAL</b>	<b>10,349</b>

### ***Additional Land Inventory***

The District recently sold a 40 acre undeveloped parcel on Reiter Road in Gold Bar, WA. The property was originally purchased for the construction of a new middle school, but was later determined to not be an ideal location to serve our student population. The District has purchased two new properties. One property, of 2.5 acres, is next to the High School and planned for potential expansion of that school, and the other, a 9.787 acre site, is at the south eastern edge of the City and planned for a future transportation co-op.

The District is actively looking for future school sites and has given consideration to the Rice Road area on the east side of Sultan, as well as the Woods Lake Road area just west of Sultan, off of Old Owen Road. Additional thought has been given to grade span reconfigurations and schools that are area specific to address the long term needs of the District. No decisions have been made at this time for land acquisition or conceptual drawings.

### ***Leased Property/Facilities***

The District is leasing the property formerly known as the “Start Up Gym” to the Sky Valley Arts Council. The property is identified by Parcel No. 27080400200100 and contains approximately 8.74 acres.

The District does not lease from any third party any facilities for District administration or facility use.

## **Section 5: Student Enrollment Projections**

### ***Student Enrollment Projections 2020 - 2025***

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. 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 plans to monitor closely actual enrollment and, if necessary, make appropriate adjustments in future Plan updates. For purposes of this update, the District reviewed three methods of projections:

1. ***The Office of Financial Management (OFM)*** “ratio method” is based upon Snohomish County population estimates for people residing within the Sultan School District Service Area (both within the corporate City limits of Sultan and Gold Bar as well as unincorporated parts of Snohomish County) compared to current Actual student enrollment. Between 2014 and 2019, the District’s enrollment averaged approximately 13.81% of the total population in the Sultan School District service area. Assuming that the District’s headcount enrollment will continue to increase in direct proportion with the Sultan School District service area population, a total enrollment of 2,151 students is projected for 2025. This is an increase of 170 students from actual 2019 enrollment, or an 8.58% increase. Using the OFM methodology, student enrollment is anticipated at 2,392 by 2035 when the Population Forecast of 17,322 residents in the Sultan School District Service Area is expected.
2. ***The Office of Superintendent of Public Instruction (OSPI)*** projections are based upon a “cohort” survival method which uses the “official” student count day of October 1<sup>st</sup> each year to establish historical enrollment data from the previous 5 years to create an average to forecast forward the number of students who will be attending school in the following years, also known as a Linear Projection. The cohort survival method is considered conservative given that it doesn’t account fully for in-migration due to growth. The cohort survival method uses a headcount analysis and includes students enrolled in non-brick and mortar programs in the District (such as the virtual academy and Running Start). Based on the OSPI “cohort” methodology, the District’s enrollment will increase in 2025 to 2,163 students, an increase of 9.2% over 2019 headcount enrollment. See Appendix A – page 1.
3. ***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. In particular, the District is aware of approximately 200 new homes coming on line by the end of 2020 and an additional 631 homes in the permit pipeline expected by the end of 2022. The District’s enrollment projections start with actual 2019 enrollment and uses a monthly average to produce an annual enrollment number. The District uses this average to project forward in forecasting for budget purposes and to ensure adequate staffing levels to meet enrollment projections. The District’s methodology uses a full-time equivalent analysis instead of headcount to more accurately reflect the actual number of students in school buildings at a given time. In addition, the District’s methodology adjusts for the elimination of the enrollment in the virtual academy

following the 2018 school year. Based upon the District’s methodology, the District’s enrollment will increase by a total of 381 students by 2025, an increase of 19.23% from 2019 enrollment level. See Appendix A – page 2.

OFM, OSPI, and the District’s enrollment projections are reflected in Table 6.

**Table 6 Enrollment Projections**

								<b>Projected Change</b>	<b>Percent Change</b>
<b>Method</b>	2019 <sup>^</sup>	2020	2021	2022	2023	2024	2025	2019-2025	2019-2025
OFM	1,981	2,009	2,037	2,065	2,093	2,121	2,151	170	8.58%
OSPI	1,981	2,022	2,048	2,092	2,109	2,153	2,163	182	9.20%
District	1,981	1,950	2,030	2,282	2,302	2,332	2,362	381	19.23%
Population Projections	14,522						15,572	1,050	7.23%

<sup>^</sup>October 1, 2017 actual enrolment.

The Sultan School District has chosen to follow the District’s methodology during this planning period because that methodology more accurately reflects the anticipated growth based on historic patterns and expected new development based on updated information. The District intends to monitor enrollment data and make annual adjustments as needed. The District will revisit the enrollment methodology in future updates to the CFP.



### ***Enrollment Projections - 2035***

Student enrollment projections beyond 2025 are highly speculative. Using OFM/County data as a base, the District projects a 2035 student FTE population of 2,392. This is based on the OFM/County data and the District’s corresponding 2019 enrollment figures. The total enrollment estimate was broken down by grade span to evaluate long-term needs for capital facilities. The grade span breakdown assumes that the proportion of students in each grade band will remain constant.

Projected enrollment by grade span for the year 2035 is provided in Table 7. Again, these estimates are highly speculative and are used only for general planning purposes.

**Table 7 OFM Enrollment Projections from 2017 to 2035**

<b>Grade Span</b>	<b>Actual Enrollment – October 2019</b>	<b>Projected Enrollment 2035*</b>
Elementary (K-5)	894	1,080
Middle School (6-8)	492	594
High School (9-12)	595	718
<b>TOTAL (K-12)</b>	<b>1,981</b>	<b>2,392</b>

Note: Snohomish County Planning and Development Service provided the underlying data for the 2035 projections.

## **Section 6: Capital Facility Needs**

The projected available student capacity was determined by subtracting permanent capacity from actual 2019 enrollment and projected 2025 enrollment. Importantly, existing and planned portable capacity, which is a capacity solution, is not included in this analysis. Capacity needs are expressed in terms of “unhoused students.”

**Table 8 Unhoused Students – Based on October 2019 Enrollment**

Grade Span	Permanent Capacity	Enrollment	Available Capacity*	Unhoused Students
Elementary Level (K-5)	686	894	0	208
Middle Level (6-8)	480	492	0	12
High School Level (9-12)	448	595	0	147
<b>TOTALS</b>	<b>1,614</b>	<b>1,981</b>	<b>0</b>	<b>367</b>

\*Permanent capacity only

Assuming no new capacity additions during the six year period, Table 9 identifies the additional permanent classroom capacity that will be needed in 2025, the end of the six year forecast period:

**Table 9 Unhoused Students – Based on Projected October 2025 Enrollment**

Grade Span	Permanent Capacity	Enrollment (FTE)	Available Capacity*	Unhoused Students	%age of Unhoused Students 2019-2025
Elementary Level (K-5)	686	1,118	0	432	51.9%
Middle Level (6-8)	480	582	0	102	88.2%
High School Level (9-12)	448	662	0	214	31.3%
<b>TOTALS</b>	<b>1,614</b>	<b>2,362</b>	<b>0</b>	<b>748</b>	<b>50.9%</b>

\*Permanent capacity only

Table 9 demonstrates that projected growth through 2025 will impact the District’s facilities at all three grade levels.

Importantly, Table 9 does not include portable classroom additions or adjustments that could be made to meet capacity needs. For example, the portable classrooms currently located at the elementary school level could be used to serve middle school capacity needs.

Projected permanent capacity needs are depicted in Table 10. They are derived by applying the District’s projected number of students to the projected capacity. Planned improvements by the District through 2025 are included in Table 10 and more fully described in Table 11.

**Table 10 Projected Student Capacity – 2019 through 2025**

**Elementary School -- Surplus/Deficiency**

	<b>2019*</b>	<b>2020</b>	<b>2021</b>	<b>2022</b>	<b>2023</b>	<b>2024</b>	<b>2025</b>
Existing Capacity	686	686	686	686	686	686	886
Added Permanent Capacity	0	0	0	0	0	200**	700+
Enrollment	894	927	964	1,080	1,090	1,104	1,118
Permanent Facilities Surplus/(Deficiency)^	(208)	(241)	(278)	(394)	(404)	(218)	468

\* Actual Oct. 2019 FTE enrollment

\*\* Classroom addition at Sultan Elementary School (100) and Gold Bar Elementary (100)

+ New Elementary School (700)

^Does not include capacity solutions with current and planned portable classrooms

**Middle School Level -- Surplus/Deficiency**

	<b>2019*</b>	<b>2020</b>	<b>2021</b>	<b>2022</b>	<b>2023</b>	<b>2024</b>	<b>2025</b>
Existing Capacity	480	480	480	480	480	570	570
Added Permanent Capacity	0	0	0	0	90**	0	0
Enrollment	492	487	506	564	568	575	582
Permanent Facilities Surplus/(Deficiency)^	(12)	(7)	(26)	(84)	2	(5)	(12)

\* Actual Oct. 2019 FTE enrollment

\*\* Classroom addition at Sultan Middle School

^ Does not include capacity solutions with in current portable classrooms

**High School Level -- Surplus/Deficiency**

	<b>2019*</b>	<b>2020</b>	<b>2021</b>	<b>2022</b>	<b>2023</b>	<b>2024</b>	<b>2025</b>
Existing Capacity	448	448	448	448	448	704	704
Added Permanent Capacity	0	0	0	0	256**	0	0
Enrollment	595	536	560	637	644	653	662
Permanent Facilities Surplus/(Deficiency)^	(147)	(88)	(112)	(189)	60	51	42

\* Actual Oct. 2019 FTE enrollment

\*\* Classroom addition at Sultan High School

^ Does not include capacity solutions with current and planned portable classrooms

### ***Planned Improvements***

Table 10 indicates that the District will need additional capacity at all grade levels to serve projected student enrollment. The District's Board of Directors adopted a resolution in November 2015 to place a bond measure on the February 2016 ballot. That measure, if approved, would have funded modernization and capacity expansion projects at all four district schools. The February 2016 bond measure did not receive the required 60% approval. The Board is considering review of a future resolution for projects similar to those presented in the February 2016 proposal. Future updates to this CFP will include updated information regarding any adopted bond resolution.

#### **Projects Adding Permanent Capacity (subject to funding):**

- a 100 seat expansion at Sultan Elementary School;
- a 100 seat expansion at Gold Bar Elementary School;
- a 90 seat expansion at Sultan Middle School;
- a 256 seat expansion at Sultan High School; and
- a new 700 student elementary school.

#### **Non-Capacity Adding Projects (subject to funding):**

- Modernization and improvements at all four campuses; and
- School athletic facilities improvements.

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 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 School Construction Assistance funds, and impact fees. The potential funding sources are discussed below.

### ***Interim Classroom Facilities (Portables)***

During the six years of this planning period, the District may purchase or lease portable classrooms and/or relocate portables if necessary to address growth needs. 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, capital levies, State School Construction Assistance funds, and School 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. General Obligation Bonds or Special Levies would be the primary source of funding for any future capital improvement projects.

### ***State School Construction Assistance Program***

State School Construction Assistance Program funds come from the Common School Construction Fund. The State deposits revenue from the sale of renewable resources from State school lands set aside by the Enabling Act of 1889 into the Common School Account. If these sources are insufficient to meet needs, the Legislature can appropriate General Obligation Bond funds or the Superintendent of Public Instruction can prioritize projects for funding. School districts may qualify for State School Construction Assistance Program funds for specific capital projects based on a prioritization system. The District anticipates that it will receive SCAP funds for the Sultan High school and Gold Bar Elementary School projects that are included in this CFP. The District is eligible for State School Construction Assistance funds for certain projects at the 62.74% funding percentage level.

### ***School Impact Fees***

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 are issued. Following a decline in enrollment in 2010, the District did not request school impact fees for several years. With recent and projected continued enrollment increases, as well as capacity planning to address these enrollment needs, the District began requesting school impact fees in 2016 and continues to do so in this Capital Facilities Plan.

### ***Six-Year Financial Plan***

The Six-Year Financial Plan shown in Table 11 is a summary of the expected budget that supports the projects in this Capital Facilities Plan. The financing components include possible funding from capital bonds and levies, school impact fees, and State Construction Assistance Funds (dependent upon qualifying, level of funding and availability of 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 expects that, as project and bond planning proceeds, the estimated project costs in Table 11 are likely to increase. Thus, the project cost estimates in this CFP should be viewed conservatively. Future updates to this CFP will include updated cost estimates.

**Table 11 Finance Plan 2020-2025**

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

Project	2020	2021	2022	2023	2024	2025	Total Cost	Bonds/Levy	State Funds	Impact Fees
<b>Elementary School</b>										
Sultan Elementary Addition					\$4.401		\$4.401	X		X
Gold Bar Elementary Addition					\$7.735		\$7.735	X	X	X
New Elementary (estimated future costs*)					\$20.000	\$5.000	\$25.000	X		X
Site Acquisition (New Elementary)							TBD	X		X
<b>Middle School</b>										
Sultan Middle Addition				\$1.396	\$1.000		\$2.396	X		X
<b>High School</b>										
Sultan High Addition				\$9.793	\$3.000		\$12.793	X	X	X
<b>K-12</b>										
Portables							TBD			X

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

Project	2020	2021	2022	2023	2024	2025	Total Cost	Bonds/Levy	State Funds	Impact Fees
<b>Elementary School</b>										
Sultan Elementary Modernization					\$3.601		\$3.601	X		
Gold Bar Elementary Modernization					\$12.099		\$12.099	X	X	
<b>Middle School</b>										
Sultan Middle Modernization				\$6.583	\$3.000		\$9.583	X		
<b>High School</b>										
Sultan High Modernization				\$34.537	\$20.000		\$54.537	X	X	

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

	2020	2021	2022	2023	2024	2025	Total Cost	Bonds/Levy	State Funds	Impact Fees
<b>TOTAL</b>				\$52.309	\$74.836	\$5.0	\$132.145	X	X	X

*\*Estimated facility cost only; future site needed but land costs unknown at this time. Future updates to the CFP will include identified costs.*

## **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;

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. The cities of Sultan and Gold Bar have adopted school impact fee ordinances consistent with the Snohomish County school impact fee ordinance.

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

Impact fees are calculated utilizing the formula in the Snohomish County school 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. A student factor (or student generation rate) is used to identify the average cost per dwelling unit by measuring the average number of students generated by each housing type (single-family dwellings and multi-family dwellings of one bedroom and two bedrooms or more). A description of the student methodology is contained in Appendix B. As required under the GMA, credits are applied in the formula to account for State School Construction Assistance 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 uses only the percentage of the total new capacity project costs allocated to the Districts growth-related needs, as demonstrated in Table 9. 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 11 for a complete identification of funding sources.

The following projects are included in the impact fee calculation:

- 100 student capacity additions at both Sultan and Gold Bar Elementary Schools;
- A new 700 student elementary school;
- 90 student capacity addition at Sultan Middle School; and
- 256 student capacity addition at Sultan High School.

Please see Table 11 for relevant cost data related to each capacity project.

**Table 12 School Impact Fees**

<b>Housing Type</b>	<b>Impact Fee Per Unit</b>
<b><i>Single Family Residential</i></b> (detached)	\$2,966
<b><i>Multi-Family (2+ bdrms)</i></b>	\$2,685
<b><i>Multi-Family (studio or 1 bdrm)</i></b>	\$0

*\*Table 10 reflects a 50% adjustment to the calculated fee as required by local ordinances.*



**APPENDIX A**



School Facilities and Organization  
 INFORMATION AND CONDITION OF SCHOOLS  
 Enrollment Projections (Report 1049)

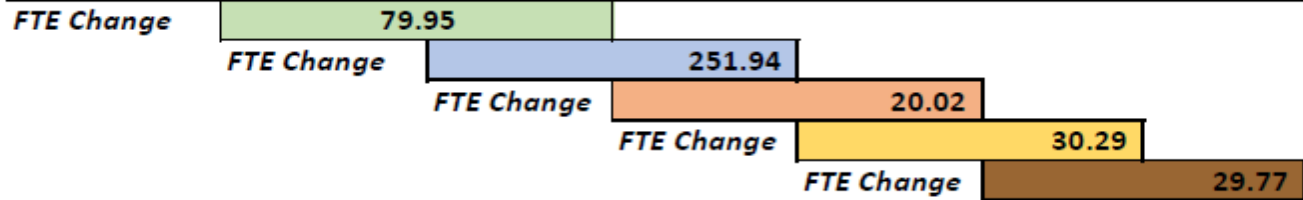
Snohomish/Sultan(31311)

Grade	--- ACTUAL ENROLLMENTS ON OCTOBER 1st ---						AVERAGE % SURVIVAL	--- PROJECTED ENROLLMENTS ---					
	2014	2015	2016	2017	2018	2019		2020	2021	2022	2023	2024	2025
Kindergarten	150	134	139	147	137	158		150	151	153	155	156	158
Grade 1	151	147	130	161	158	147	105.12%	166	158	159	161	163	164
Grade 2	150	158	154	129	147	154	99.47%	146	165	157	158	160	162
Grade 3	137	145	154	144	127	158	98.70%	152	144	163	155	156	158
Grade 4	144	145	161	159	151	125	104.67%	165	159	151	171	162	163
Grade 5	121	156	140	169	162	152	102.47%	128	169	163	155	175	166
Grade 6	145	143	164	142	173	170	106.40%	162	136	180	173	165	186
<b>K-6 Sub-Total</b>	<b>998</b>	<b>1,028</b>	<b>1,042</b>	<b>1,051</b>	<b>1,055</b>	<b>1,064</b>		<b>1,069</b>	<b>1,082</b>	<b>1,126</b>	<b>1,128</b>	<b>1,137</b>	<b>1,157</b>
Grade 7	148	153	144	169	141	178	102.28%	174	166	139	184	177	169
Grade 8	137	158	154	146	154	144	100.40%	179	175	167	140	185	178
<b>7-8 Sub-Total</b>	<b>285</b>	<b>311</b>	<b>298</b>	<b>315</b>	<b>295</b>	<b>322</b>		<b>353</b>	<b>341</b>	<b>306</b>	<b>324</b>	<b>362</b>	<b>347</b>
Grade 9	139	140	146	146	132	164	97.25%	140	174	170	162	136	180
Grade 10	142	137	150	151	148	142	103.61%	170	145	180	176	168	141
Grade 11	124	137	155	120	142	148	96.72%	137	164	140	174	170	162
Grade 12	176	138	151	146	123	141	103.49%	153	142	170	145	180	176
<b>9-12 Sub-Total</b>	<b>581</b>	<b>552</b>	<b>602</b>	<b>563</b>	<b>545</b>	<b>595</b>		<b>600</b>	<b>625</b>	<b>660</b>	<b>657</b>	<b>654</b>	<b>659</b>
<b>DISTRICT K-12 TOTAL</b>	<b>1,864</b>	<b>1,891</b>	<b>1,942</b>	<b>1,929</b>	<b>1,895</b>	<b>1,981</b>		<b>2,022</b>	<b>2,048</b>	<b>2,092</b>	<b>2,109</b>	<b>2,153</b>	<b>2,163</b>

Notes: Specific subtotalling on this report will be driven by District Grade spans.

**SULTAN SCHOOL DISTRICT  
ENROLLMENT PROJECTIONS  
2020-21 THRU 2025-26**

GRADE	2020-21	2021-22	2022-23	2023-24	2024-25	2025-26
Full Day K	155.40	161.55	180.93	182.47	184.80	187.09
First	157.40	163.55	182.93	184.47	186.80	189.09
Second	161.40	167.55	186.93	188.47	190.80	193.09
Third	131.40	137.55	156.93	158.47	160.80	163.09
Fourth	154.40	160.55	179.93	181.47	183.80	186.09
Fifth	167.40	173.55	192.93	194.47	196.80	199.09
Sixth	168.40	174.55	193.93	195.47	197.80	200.09
Seventh	157.40	163.55	182.93	184.47	186.80	189.09
Eighth	161.40	167.55	186.93	188.47	190.80	193.09
Ninth	147.40	153.55	172.93	174.47	176.80	179.09
Tenth	155.40	161.55	180.93	182.47	184.80	187.09
Eleventh	127.40	133.55	152.93	154.47	156.80	159.09
Twelfth	105.40	111.55	130.93	132.47	134.80	137.09
<b>TOTAL</b>	<b>1,950.20</b>	<b>2,030.15</b>	<b>2,282.09</b>	<b>2,302.11</b>	<b>2,332.40</b>	<b>2,362.17</b>



<b>5 Year Total</b>	<b>411.97</b>
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**APPENDIX B**



**DOYLE  
CONSULTING**

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

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

4/3/20

This document describes the methodology used to calculate student generation rates (SGRs) for the Sultan 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 Sultan School District from January 2012 through December 2018. 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 Sultan School District as of March 2020. 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 237 single family detached units were compared with data on 1,946 students registered in the District, and the following matches were found by grade level(s)\*:

GRADE(S)	COUNT OF MATCHES	CALCULATED RATE
K	4	0.017
1	12	0.051
2	10	0.042
3	11	0.046
4	5	0.021
5	8	0.034
6	6	0.025
7	5	0.021
8	2	0.008
9	7	0.030
10	0	0.000
11	3	0.013
12	6	0.025
K-5	50	0.211
6-8	13	0.055
9-12	16	0.068
K-12	79	0.333

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:** County Assessor data indicate that there were 2 duplexes (4 units) built within the District boundaries during the period of this study. No specific matches were made.

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

	<b>K-5</b>	<b>6-8</b>	<b>9-12</b>	<b>K-12</b>
<b>Single Family</b>	.211	.055	.068	.333

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

**Multi-Family 2+ BR Rates:** As noted above, the District does not have a reliable data set for purposes of calculating student generation rates for Multi-Family 2+ bedroom units. Consistent with the methodology used in the 2016, 2017, and 2018 Sultan School District Capital Facilities Plans, the District has calculated Multi-Family 2+ BR student generation rates using the countywide average of the corresponding rates published in the 2018 capital facilities plans (the last County-adopted set of plans) of the other school districts in Snohomish County. The District compared these averages with the averaged based on the 2016 adopted capital facilities plans. These averages reflect recent development trends in Snohomish County which will likely influence any multi-family construction that occurs in the District in the near term. Additionally, King County has recognized countywide averages as a reasonable approach to calculating student generation rates when there is a lack of sufficient development data. See KCC 21A.06.1260.

The District is choosing to continue to apply the 2016 calculated average, which is lower at each grand band than the 2018 calculated average, as a conservative estimate of student generation from new Multi-Family 2+ bedroom units within the Sultan School District.

The resulting average student generation rates are as follows:

<b>Multi-Family 2+ BR Rates</b>	<b>K-5</b>	<b>6-8</b>	<b>9-12</b>
	<b>0.142</b>	<b>0.064</b>	<b>0.073</b>

Student generation rates were not calculated for multi-family dwelling units with one bedroom or less as current data is insufficient for purposes of calculating a countywide average in Snohomish County.

**APPENDIX C**



<b>SCHOOL IMPACT FEE CALCULATIONS</b>									
DISTRICT	Sultan School District								
YEAR	2020								
<b>School Site Acquisition Cost:</b>									
((AcresxCost per Acre)/Facility Capacity)xStudent Generation Factor									
	Facility	Cost/	Facility	Student	Student	Student	Cost/	Cost/	Cost/
	Acreage	Acre	Capacity	SFR	MFR (1)	MFR (2+)	SFR	MFR (1)	MFR (2+)
Elementary	10.00	\$ -	900	0.211	0.000	0.142	\$0	\$0	\$0
Middle	20.00	\$ -	90	0.055	0.000	0.064	\$0	\$0	\$0
High	40.00	\$ -	256	0.068	0.000	0.073	\$0	\$0	\$0
						<b>TOTAL</b>	<b>\$0</b>	<b>\$0</b>	<b>\$0</b>
<b>School Construction Cost:</b>									
((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	84.80%	\$ 37,135,984	900	0.211	0.000	0.142	\$7,383	\$0	\$4,969
Middle	84.80%	\$ 2,395,680	90	0.055	0.000	0.064	\$1,241	\$0	\$1,445
High	84.80%	\$ 12,792,624	256	0.068	0.000	0.073	\$2,882	\$0	\$3,093
						<b>TOTAL</b>	<b>\$11,506</b>	<b>\$0</b>	<b>\$9,507</b>
<b>Temporary Facility Cost:</b>									
((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	15.20%	\$ -	25	0.211	0.000	0.142	\$0	\$0	\$0
Middle	15.20%	\$ -	30	0.055	0.000	0.064	\$0	\$0	\$0
High	15.20%	\$ -	32	0.068	0.000	0.073	\$0	\$0	\$0
						<b>TOTAL</b>	<b>\$0</b>	<b>\$0</b>	<b>\$0</b>
<b>State School Construction Funding Assistance Credit:</b>									
CCA X SPI Square Footage X District Funding Assistance % X Student Factor									
	CCA	SPI	Funding	Student	Student	Student	Cost/	Cost/	Cost/
		Footage	Asst %	SFR	MFR (1)	MFR (2+)	SFR	MFR (1)	MFR (2+)
Elementary	\$ 238.22	90	62.74%	0.211	0.000	0.142	\$2,838	\$0	\$1,910
Middle	\$ 238.22	108	0.00%	0.055	0.000	0.064	\$0	\$0	\$0
High	\$ 238.22	130	62.74%	0.068	0.000	0.073	\$1,321	\$0	\$1,418
						<b>TOTAL</b>	<b>\$4,159</b>	<b>\$0</b>	<b>\$3,328</b>
<b>Tax Payment Credit:</b>									
							SFR	MFR (1)	MFR (2+)
Average Assessed Value							\$311,979	\$125,314	\$178,051
Capital Bond Interest Rate							2.44%	2.44%	2.44%
Net Present Value of Average Dwelling							\$2,738,945	\$1,100,164	\$1,563,156
Years Amortized							10	10	10
Property Tax Levy Rate							\$0.52	\$0.52	\$0.52
Present Value of Revenue Stream							<b>\$1,415</b>	<b>\$568</b>	<b>\$807</b>
<b>Fee Summary:</b>									
				Single	Multi-	Multi-			
				Family	Family (1)	Family (2+)			
Site Acquisition Costs				\$0	\$0	\$0			
Permanent Facility Cost				\$11,506	\$0	\$9,507			
Temporary Facility Cost				\$0	\$0	\$0			
State SCFA Credit				(\$4,159)	\$0	(\$3,328)			
Tax Payment Credit				(\$1,415)	(\$568)	(\$807)			
FEE (AS CALCULATED)				\$5,932	(\$568)	\$5,371			
<b>Fee (AS DISCOUNTED)</b>				<b>\$2,966</b>	<b>\$0</b>	<b>\$2,685</b>			