



MONROE SCHOOL DISTRICT

**CAPITAL FACILITIES PLAN
2024–2029**

Adopted: August 12, 2024

CAPITAL FACILITIES PLAN MONROE SCHOOL DISTRICT NO. 103

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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 (2024-2029). 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 5,503 (October 1, 2023 headcount, with 5,032 in-district students) 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 Monroe High School campus. Sky Valley Education Center, an individualized program for students in grades K-12 that provides for an alternative learning environment, is housed in a former middle school facility. 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.

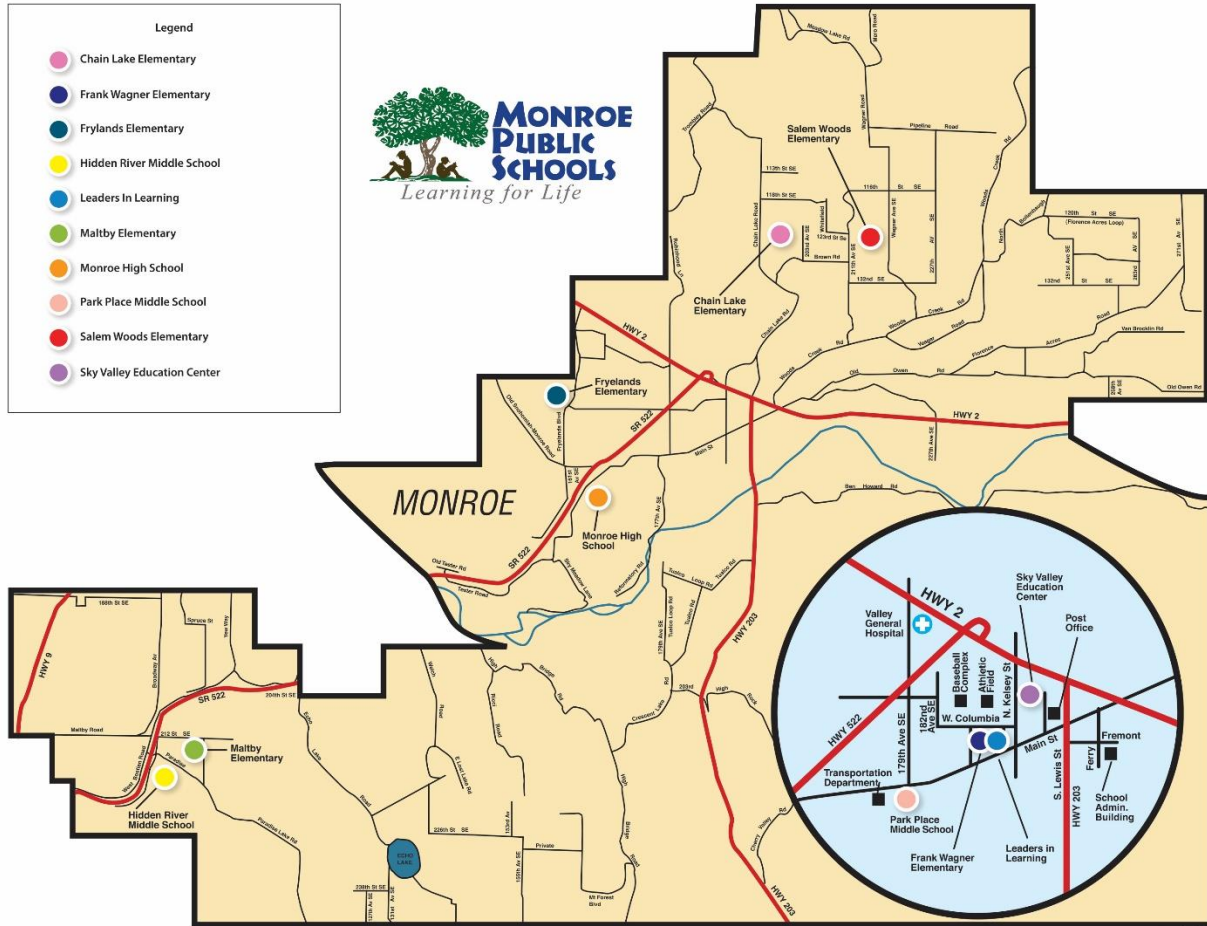
Significant Issues Related To Facility Planning In the Monroe School District

The most significant issues facing the Monroe School District in terms of providing classroom capacity to accommodate projected demands are aging school facilities, the rate of student growth, the availability and affordability of suitable school sites, including perkable soil for septic systems, access to water and the geographic constraints associated with the increased student population.

The District recently completed projects approved by the voters in April 2015. These projects helped address some issues with aging school facilities and capacity needs. The District is in the early planning stages for a proposed future bond measure. It is anticipated that a future bond proposal will address modernization and expansion of school facilities.

MAP – MONROE SCHOOL DISTRICT

- Legend
- Chain Lake Elementary
 - Frank Wagner Elementary
 - Frylands Elementary
 - Hidden River Middle School
 - Leaders In Learning
 - Maitby 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.
- 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.

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 2024 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 2021-22 and 2022-23, the District’s compliance with the minimum level of service was as follows:

2021-22 School Year						
LOS Standard	MINIMUM LOS# Elementary	REPORTED LOS Elementary	MINIMUM LOS Middle	REPORTED LOS Middle	MINIMUM LOS High	REPORTED LOS High
	27	17.65	30	16.35	30	25.20

* 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. Student counts include out-of-district SVEC students.

2022-23 School Year						
LOS Standard	MINIMUM LOS# Elementary	REPORTED LOS Elementary	MINIMUM LOS Middle	REPORTED LOS Middle	MINIMUM LOS High	REPORTED LOS High
	27	18.15	30	17.46	30	20.83

* 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. Student counts include out-of-district SVEC students.

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 portables located on the Monroe High School campus. Sky Valley Education Center, a grades 1-12 individualized parent partnership program is housed in the old Monroe Middle School site. Pre-kindergarten students are served in programs at both Fryelands Elementary and Chain Lake Elementary Schools.

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
Elementary School						
Chain Lake	14.4	46,207	21	440	1990	yes**
Frank Wagner	10.21	68,408	34	714	2018	yes
Fryelands	7.09	54,074	20	420	2005	no
Maltby	10	50,230	24	504	2005	no*
Salem Woods	13.78	50,545	25	524	2018	yes
SVEC (part) ***	6	40,905	14	280	1980	no
Totals	61.48	310,369	138	2,882		

* 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
Middle School						
Park Place Middle	19.4	135,684	41	953	2018	yes
Hidden River	20	84,341	25	581	2023	yes
SVEC (part) **		22,652	8	220	1980	no
Totals	39.4	242,677	74	1,754		

* 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 Last Remodel	Potential for Expansion
High School						
Monroe HS	33	209,432	72	1,815	2005	yes
Leaders In Learning	**	14,250	**	**	**	**
SVEC (part) ***		21,440	7	209	1980	no
Totals	33	245,122	79	2,024		

* Calculated at 90% room utilization

** Leaders in Learning located on the Monroe High School campus in portable facilities.

*** 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	2	44	1,536
Monroe High School	10*	186	7,560
Preschool/Head Start	3	40	2,679
Old District Office	2	0	2,504
Transportation	2	0	952
	28	468	23,379

* Two portables for Life Skills; five portables for Leaders in Learning.

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)
Old District Admin Office and Warehouse	3.5	21,584
District Administration Office	2.48	31,151
Maintenance Shops	0.2	5,459
Transportation	3.4	6,612
Totals	9.58	64,806

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 a future 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 using the site for future expansion or 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. This site potentially could be used for a future school.

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 2023 headcount enrollment was 5,503, but that figure includes out-of-district students enrolled in the Sky Valley Education Center program. The District adjusts its enrollment to exclude these students for purposes of this Capital Facilities Plan (with an adjusted enrollment of 5,032 for October 2023). Notably, the OSPI enrollment cohort projection data (Form 1049) appears inaccurate as it does not track with the enrollment data reported to OSPI and contained in OSPI Forms 1251 and 1251H. As such, the District finds the Form 1049 data unreliable.¹ For purposes of this CFP and determining facility needs and anticipated enrollment projections, the District looks to modified cohort enrollment projections prepared by an outside demographer and projections based on Snohomish County’s 2044 GMA Population Forecast (2024 Release).

RECENT TRENDS - STUDENT ENROLLMENT IN DISTRICT FACILITIES

Over the previous six years, the District’s enrollment was heavily affected by enrollment fluctuations due to the COVID-19 pandemic and uncertainties with regard to in-person learning. Enrollment is starting to stabilize with the exception of high school enrollment, which has declined further in the last two years. Table 6 shows the actual enrollment in District facilities during the years 2018-2023, excluding out-of-district students enrolled in the Sky Valley Education Center.

**Table 6- Total Student Enrollment
(District Residents in District Facilities)
Monroe School District 2018-2023**

Enrollment by Grade Span	2018-19	2019-20	2020-21	2021-22	2022-23	Oct. 2023
Elementary (K-5)	2,646	2,619	2,241	2,237	2,287	2,244
Middle School (6-8)	1,323	1,335	1,292	1,200	1,176	1,137
High School (9-12)	2,203	2,179	2,080	2,044	1,678	1,651
TOTAL	6,172	6,133	5,613	5,481	5,141	5,032

¹ In addition, the OSPI figures previously included enrollment of students in off-site credit retrieval programs provided by two separate community colleges in cooperation with the District. The District discontinued these relationships at the end of the 2021-22 school year. In previous CFPs, the District adjusted its enrollment to exclude these students from its reported enrollment. The District also excludes out of district students enrolled in alternative learning programs housed within the District.

PROJECTED STUDENT ENROLLMENT (2024-2029)

Enrollment in the District, after several years of an upward trend that peaked in the 2016-17 school year, marginally declined in the immediate years thereafter and then dropped further during the COVID-19 pandemic. K-12 enrollment in Snohomish County is growing but is concentrated currently in other areas. However, new housing development planned within the District boundaries, as well as some enrollment stabilization at the elementary and middle school levels post-pandemic, is expected to bring new enrollment growth at the K-5 level over the six year planning period. The District intends to monitor carefully how residential development over the next six years may lead to growth in the District's enrollment, particularly as the City of Monroe plans for its 2044 growth targets, including planning for between 2,112 and 2,888² new dwelling units within the City and its unincorporated urban growth area by 2044.

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"). The modified cohort survival projection was prepared in June 2024. The District is using the demographer's "medium range" projection as adjusted for out-of-district students enrolled in the Sky Valley Education Center (see discussion on next page). The District intends to revisit these projections as more specificity is developed with regard to implementation of housing target planning and actual development.

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. This concept is particularly striking when considering the COVID-19 pandemic and its anomalous impact on school enrollments nationwide. 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.

The modified cohort survival methodology combines the cohort survival method with information

² Based on current City discussions related to land use scenarios being considered in the "Monroe 2044" planning.

about market share gains and losses from private schools, information about population growth from new housing construction, and information about regional trends, including the post-pandemic shift in student learning. 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.³ The District has adjusted those projections to by a factor that removes anticipated out-of-District enrollment at SVEC (based on historical trends and assuming consistency over the next six years).⁴ Those projections show an expected total adjusted enrollment of 5,196, or an increase of 3.26%, by 2029, with K-5 enrollment growing by 11.4%. Enrollment after 2029 is expected to continue to modestly grow. See *Appendix A* for more detail (*keeping in mind that the District has further modified those projections to the anticipated adjusted enrollment per the note above*).

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 2020 and 2023, the District’s housed student enrollment (as adjusted) constituted approximately 13.0% of the total population in the District. Assuming that between 2024 and 2029, the District’s enrollment will continue to constitute 13.0% of the District’s total population and using OFM/County data, OFM/County methodology projects a total enrollment of 5,748 students in District facilities in 2029.

**Table 7- Projected Student Enrollment
2024-2029
(District Residents in District Facilities)**

Projection	Oct. 2023*	2024	2025	2026	2027	2028	2029	Change 2023-29	Percent Change 2023-29
OFM/County	5,032	5,038	5,180	5,322	5,464	5,606	5,748	716	14.2%
Modified Cohort/District (Adjusted FTE)	5,032	5,083	5,043	5,030	5,062	5,131	5,196	164	3.26%

*Actual adjusted enrollment of District students in District facilities, October 2023

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

³ The District is continuing its use of the demographer’s report prepared in March 2033 as the “low range” projections in that report track with recent District enrollment trends.

⁴ The demographer’s projections also remove students enrolled in full-time Running Start and out-of-district student enrolled in District special education programs.

Plan may revisit this issue.

PROJECTED STUDENT ENROLLMENT (POST-2029)

Student enrollment projections beyond 2029 are highly speculative. Using OFM/County data as a base, the District projects a 2044 student FTE population of 6,114. This is based on the OFM/County data showing that, for the years 2020-2023, the District’s enrollment constituted approximately 13.0% of total District population and an assumption that this percentage will remain constant through 2044. See discussion above. 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 2044 is provided in Table 8. Again, these estimates are highly speculative and are used only for general planning purposes.

**Table 8
Projected Student Enrollment
2044**

Grade Span	Adjusted FTE Enrollment October 2023	Projected Enrollment 2044*
Elementary (K-5)	2,244	2,813
Middle School (6-8)	1,137	1,406
High School (9-12)	1,651	1,895
TOTAL (K-12)	5,032	6,114

*Assumes average percentage per grade span remains constant between 2023 and 2044.

Note: Snohomish County Planning and Development Service provided the underlying data for the 2044 projections.

CHAPTER 5 – PROJECTED FACILITY NEEDS

NEAR-TERM FACILITY NEEDS (THROUGH 2029)

Current enrollment at each grade level is identified in Table 6, which provides the actual adjusted enrollment in District facilities as of October 1, 2023. *Projected* available student capacity is derived by subtracting projected student enrollment from existing October 2023 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 included⁵.

To determine future facility needs, existing school program capacity is compared to projected enrollment throughout the six-year forecast period. Without the consideration of portables, the District currently has capacity available at all grade levels (see Table 11). Table 9 assumes no new capacity construction through 2029. 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 2024-2029. Based on current enrollment projections, the District is not showing a growth related capacity need during the six-year planning period.

Table 9
Available Student Capacity 2023-2029

Grade Span	2023 Enrollment	Existing Permanent Capacity [^]	2023 Surplus	2029 Enrollment	2029 Surplus/(Deficit)
K-5	2,244	2,882	638	2,500	382
6-8	1,137	1,754	617	1,145	609
9-12	1,651	2,024	373	1,551	473

[^]Existing as of Oct. 2023.

⁵ Information on portables and interim capacity can be found in Table 4.

CHAPTER 6 – CAPITAL FACILITIES FINANCING PLAN

RECENT PROJECTS AND 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 early planning stages for an anticipated bond proposal that would address facility needs during the six years of this planning period, as further detailed herein. The identified future bond project proposals are subject to the final recommendations of the District’s bond community advisory committee and 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 2029 (assuming bond approval).

Frank Wagner Elementary: Add new capacity for 88 students as a part of modernization project. Project projected to be complete in 2029 (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 2029-30 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).

Wagner Center Early Learning Center: Convert a portion of the Wagner Center to an early learning center to provide for a pre-kindergarten, ECAP, and/or other early learning programs. This project is in early consideration (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 2023.

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.

Other:

The District may consider moving Sky Valley Education Center to a new location.

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.

The District anticipates that it will enter into bond planning during the six year planning period and identify a proposed measure to fund some of 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 Program (SCAP) 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 43.52% (current) funding percentage level. The current Construction Cost Allowance, the maximum cost/square foot recognized for SCAP funding, is established in the State’s biennial budget and currently is \$375.00/eligible square foot.

Impact Fees

Impact fees supplement traditional funding sources for the costs of public facilities needed to accommodate new development. A school district’s Capital Facilities Plan establishes the District’s eligibility for school impact fee collection for growth-related needs.

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 2024-2029. The financing components include bond funds and school construction assistance funds. School impact fees, at this time, are not identified as a source given that the District has not identified growth-related needs in this CFP. Future updates to the CFP may reflect changed conditions. In any case, projects and portions of projects which remedy existing deficiencies are not appropriate for impact fee funding.

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;
- Changes in the instructional model;
- Grade configuration changes;
- Increased class sizes; or
- Modified school calendar.

Table 10 – Planned Construction Projects (Figures in Millions of Dollars)

Improvements Adding Permanent Capacity (only projects estimated to be completed by 2029-30)

Project	2024	2025	2026	2027	2028	2029	Total Cost	Bond/ Local**	State Match	Impact Fees
Elementary School										
Proposed Salem Woods Expansion					\$3.740	\$3.000	\$6.744	X	X	
Proposed Frank Wagner Expansion					\$3.185	\$2.000	\$5.185	X	X	
Proposed Chain Lake Elementary Expansion					\$7.750	\$6.000	\$13.750	X	X	
Middle School										
High School										
Site Acquisition										
Portables							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 2029-26)

Project	2024	2025	2026	2027	2028	2029	Total Cost	Bond/ Local**	State Match	Impact Fees
Elementary										
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 Modernization					\$14.628	\$10.000	\$24.628	X	X	
Middle School										
High School										
District-wide										
Improvements and Major Maintenance							\$4.0	X		

**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. Using current enrollment projections, the District anticipates having sufficient capacity at all grade levels to serve new growth through the 2029-30 school year.

**Table 11
Capacity Analysis (2024-2029)**

Elementary School Surplus/Deficiency

	2023	2024	2025	2026	2027	2028	2029
Existing Capacity	2,882	2,882	2,882	2,882	2,882	2,882	2,882
Added Capacity							176^^
Total Capacity	2,882	2,882	2,882	2,882	2,882	2,882	3,058
Enrollment	2,244*	2,269	2,266	2,311	2,357	2,414	2,500
Surplus (Deficiency)	638	613	616	571	525	468	558

*Actual adjusted enrollment of District Residents in District facilities as of October 2023.

^^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 2029 or shortly thereafter.

Middle School Surplus/Deficiency

	2023	2024	2025	2026	2027	2028	2029
Existing Capacity	1,754	1,754	1,754	1,754	1,754	1,754	1,754
Added Capacity							
Total Capacity	1,754	1,754	1,754	1,754	1,754	1,754	1,754
Enrollment	1,137*	1,178	1,198	1,178	1,146	1,134	1,145
Surplus (Deficiency)	617	576	556	576	608	620	609

*Actual adjusted enrollment of District Residents in District facilities as of October 2023.

High School Surplus/Deficiency

	2023	2024	2025	2026	2027	2028	2029
Existing Capacity	2,024	2,024	2,024	2,024	2,024	2,024	2,024
Added Capacity							
Total Capacity	2,024	2,024	2,024	2,024	2,024	2,024	2,024
Enrollment	1,651*	1,636	1,579	1,541	1,559	1,583	1,551
Surplus (Deficiency)	373	388	445	483	465	441	473

*Actual adjusted enrollment of District Residents in District facilities as of October 2023.

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 at least the following residential dwelling 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

Where applicable, 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.

- The Site Acquisition Cost, School Construction Cost, and Temporary/Portable Facility Cost factors are based on planned or actual costs (on/off site improvements) of growth-related school capacity. Costs vary with each site and each facility. See Table 10, Finance Plan. The “Permanent Facility Square Footage” is used in combination with the “Temporary Facility Square Footage” to apportion the impact fee amounts between permanent and temporary capacity figures.

- 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. A description of the student factor methodology is contained in Appendix B. The District obtained updated student factors in 2024. See Appendix B (including a description of the student factor methodology).

The resulting average student generation rates are as follows:

	K-5	6-8	9-12
Single Family	0.205	0.062	0.071
Townhome/Duplex	0.101	0.121	0.030
Multi-Family 2+ BR	0.239	0.076	0.125
Multi-Family 1BR/less	0.000	0.000	0.000

- Where applicable, 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. See page 18. The tax credit uses the 20-year general obligation bond rate from the Bond Buyer index, the District’s current levy rate for bonds, and average assessed value of all residential units constructed in the District (provided by Snohomish County) by dwelling unit type to determine the corresponding tax credit.

The costs of projects that do not add capacity are not included in the impact fee calculations. Furthermore, when a fee is calculated: 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 are not be used to address existing deficiencies. See Table 10 for a complete identification of funding sources.

The District is not requesting school impact fees as a part of this Capital Facilities Plan update as it anticipates having sufficient capacity to serve new students from growth over the six year planning period. However, the District intends to monitor development activity and student enrollment closely in the event of any shift in expected student enrollment. In such case, the District will incorporate updated information in the next CFP update or, if necessary, an interim update.

PROPOSED MONROE SCHOOL DISTRICT IMPACT FEE SCHEDULE

The District does not have growth-related permanent capacity projects planned as a part of the 2024 CFP. See discussion in Chapter 6 above. As such, the District is not requesting the collection of school impact fees as a part of this Capital Facilities Plan. The District expects that future project planning and updates to the Capital Facilities Plan will result in a renewed request for impact fees as a part of a future CFP.

Table 13
Monroe School District
Proposed Impact Fee Schedule*

Housing Type	Impact Fee Per Unit
Single-Family	\$0
Townhomes/Duplex	\$0
Multi-Family (2+bedrooms)	\$0
Multi-Family (one bedroom/less)	\$0

**Where applicable, Table 13 reflects a 50% adjustment to the calculated fee as required by local ordinances.*

Appendix A

District Modified Cohort Survival Enrollment Projections

Figure 21: Enrollment Forecasts by Individual Grade – Middle Scenario

Grade	2023–24	2024–25	2025–26	2026–27	2027–28	2028–29	2029–30	2030–31	2031–32	2032–33	2033–34
K	369	389	403	401	436	449	450	451	453	455	456
1	414	388	409	424	422	459	472	473	474	477	479
2	414	417	391	412	427	425	462	475	476	477	480
3	384	416	419	393	414	429	427	464	477	478	479
4	434	387	420	423	397	418	433	431	468	481	482
5	456	438	390	424	427	400	422	437	435	472	485
6	413	459	441	393	427	430	403	425	440	438	475
7	424	416	462	444	396	430	433	406	428	443	441
8	425	428	420	466	448	399	434	437	410	432	447
9	453	428	431	423	469	451	402	437	440	413	435
10	466	454	429	432	424	470	452	403	438	441	414
11	452	428	417	394	397	390	432	416	370	403	405
12	401	451	427	417	394	397	390	431	416	370	403
K–5	2,471	2,435	2,432	2,477	2,523	2,580	2,666	2,731	2,783	2,840	2,861
6–8	1,262	1,303	1,323	1,303	1,271	1,259	1,270	1,268	1,278	1,313	1,363
9–12	<u>1,772</u>	<u>1,761</u>	<u>1,704</u>	<u>1,666</u>	<u>1,684</u>	<u>1,708</u>	<u>1,676</u>	<u>1,687</u>	<u>1,664</u>	<u>1,627</u>	<u>1,657</u>
Total	5,505	5,499	5,459	5,446	5,478	5,547	5,612	5,686	5,725	5,780	5,881

Notes

Students enrolled in full-time Running Start and transitional kindergarten, as well as Shoreline-Monroe and U3 in 2021–22, are excluded from analysis.

Sources

Monroe School District October 2023–24 headcount enrollment and FLO 2024–25 to 2033–34 enrollment forecasts (middle scenario).

Appendix B
School Impact Fee Calculations

The District is not requesting school impact fees as a part of the 2024 Capital Facilities Plan and, as such, has not included fee calculations.

Appendix C

2024 Student Generation Rate Study



MEMORANDUM

To: Victor Scarpelli
Monroe School District
14692 179th Ave SE
Monroe, WA 98272

Date: April 25, 2024

Project No.: F2720.01.001

From: Alex Brasch
Senior Population Geographer

Re: **2023–24 Student Generation Rates—Monroe School District**

At the request of the Monroe School District (MSD/District), FLO Analytics (FLO) estimated student generation rates (SGRs) for residential housing units built in the district boundary between 2015 and 2022. The SGRs represent the average number of MSD K–12 students (2023–24 headcount) residing in new single-family (SF) detached, townhome/duplex, and multifamily (MF) housing units. This memo details the methodology FLO used to create the SGRs and presents the findings by grade group and housing type.

Methods

As described by Snohomish County Planning & Development Services ([2022 Biennial Update to School District Capital Facilities Plans](#)), Snohomish County operates a school impact fee program authorized by RCW 82.02.040 and the Washington State Growth Management Act under Chapter 36.70A RCW. School districts that wish to collect impact fees must provide a school board adopted Capital Facilities Plan (CFP) for review by the County Planning Commission and County Council that fulfills the specifications of state law, the County comprehensive plan, and the County code. One requirement of CFPs is “impact fee support data required by the formula in Chapter 30.66C SCC, including a district-specific analysis to determine the student generation rate component of the fee calculation”.

As defined in Snohomish County code 30.91S.690, “SGRs mean the number of students of each grade span (elementary, middle/jr. high, high school) that a school district determines are typically generated by different dwelling unit types within the district.” In other words, SGRs represent the number of students residing in housing constructed within the most recent five-to-eight-year period by housing type and grade group (i.e., elementary, middle, and high school).

SGR calculations are based on housing information and student residences. FLO obtained and processed the necessary housing data from the Snohomish County Assessor’s Office and Information Technology Department, as well as the Puget Sound Regional Council, including parcel/tax lot boundaries with essential attributes—housing type, number of housing units, and year built. Housing units constructed in 2023 were excluded from the analysis, because they may not have been completed and occupied by October 2023. To link the housing information to MSD students, the District provided FLO with 2023–24 headcount enrollment, which FLO geocoded to represent student residences. The student residences were then spatially matched to residential housing built in the district boundary between 2015 and 2022.

With this combination of information, SGRs were calculated by dividing the number of students per grade group by the total number of housing units for each housing type. SGRs were calculated for the types of housing built in the district within the analysis period; namely, SF detached, townhome/duplex, and MF units. The townhome/duplex category includes the following structure types: SF attached, townhome, duplex, triplex, and fourplex. In buildings with three or more housing units in the townhome/duplex category, the dwellings are constructed vertically from the foundation to the roof for individual occupancy by a household. The MF category includes all structures with five or more housing units and structures with 3–4 housing units that are stacked. The housing inventory does not include the information needed to differentiate between MF units with 2+ bedrooms and 1 bedroom or less; therefore, the MF rate includes all MF housing units and only applies to the "Multifamily 2+ bedrooms" category in Snohomish County code.

Results

Table 1 includes the number of housing units and SGRs for SF detached, townhome/duplex, and MF housing types, as well as the number of students by grade group that have addresses matching the housing units. Table 2 includes the unit counts, number of students, and SGRs for individual MF developments. Of the 4,800 students residing within the district, 424 live in the 1,256 SF detached units that were built between 2015 and 2022, while 25 live in the 99 townhomes/duplexes and 162 live in the 368 MF units built in the same period. On average, each SF detached unit yields 0.338 K–12 students, each townhome/duplex yields 0.253 K–12 students, and each MF unit yields 0.440 K–12 students.

Table 1: K–12 Students by Grade Group per Housing Unit Built 2015–2022

Housing Type	Housing Units	Students				SGRs			
		K–5	6–8	9–12	K–12	K–5	6–8	9–12	K–12
Single-family Detached	1,256	257	78	89	424	0.205	0.062	0.071	0.338
Townhome / Duplex ^(a)	99	10	12	3	25	0.101	0.121	0.030	0.253
Multifamily ^(b)	368	88	28	46	162	0.239	0.076	0.125	0.440

Notes

- Housing units built in 2023 are excluded, because they may not have been completed and occupied by October 2023.
- (a) The townhome/duplex category includes the following structure types: single-family attached, townhome, duplex, triplex, and fourplex. In buildings with three or more housing units, the dwellings are constructed vertically from the foundation to the roof for individual occupancy by a household.
- (b) The multifamily category includes all structures with five or more housing units and structures with 3–4 housing units that are stacked. The housing inventory does not include the information needed to differentiate between MF units with 2+ bedrooms and 1 bedroom or less; therefore, the MF rate includes all MF housing units and only applies to the "Multifamily 2+ bedrooms" category in Snohomish County code.

Sources

Monroe School District 2023–24 headcount enrollment, Snohomish County parcels, and Puget Sound Regional Council 2015–2022 new housing inventory.