

1 Adopted: _____
2 Effective: _____

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6
7 SNOHOMISH COUNTY COUNCIL
8 Snohomish County, Washington

9
10 ORDINANCE NO. 24-082

11
12 ADOPTING THE 2024-2029 CAPITAL FACILITIES PLANS FOR THE ARLINGTON
13 NO. 16, EDMONDS NO. 15, EVERETT NO. 2, GRANITE FALLS NO. 332, LAKE
14 STEVENS NO. 4, LAKEWOOD NO. 306, MONROE NO. 103, MUKILTEO NO. 6,
15 SNOHOMISH NO. 201, AND SULTAN NO. 311 SCHOOL DISTRICTS, AND THE 2024-
16 2030 CAPITAL FACILITIES PLAN FOR THE NORTHSORE NO. 417 SCHOOL
17 DISTRICT PURSUANT TO SCC 30.66C.020 AND AMENDING THE SCHOOL IMPACT
18 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, Granite Falls School District No.332 indicated its desire to establish
43 its participation in the impact fee program; and

44
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1 WHEREAS, the County has negotiated and prepared a new agreement with the
2 Granite Falls School District No.332, which is consistent with the general provisions in
3 the other school district agreements; and
4

5 WHEREAS, the other ten participating school districts and the County executed
6 agreements as required under SCC 30.66C.230; and
7

8 WHEREAS, capital facilities plans for the Arlington School District No. 16,
9 Edmonds School District No. 15, Everett School District No. 2, Lake Stevens School
10 District No. 4, Lakewood School District No. 306, Marysville School District No. 25,
11 Monroe School District No. 103, Mukilteo School District No. 6, Northshore School
12 District No. 417, Snohomish School District No. 201, and Sultan School District No. 311
13 were last adopted by Snohomish County in 2022 and will expire on December 31, 2024;
14 and
15

16 WHEREAS, the Marysville School District No. 25 indicated that it will not be
17 submitting an updated capital facilities plan for the 2024 biennial update as required for
18 participation in the County's school impact fee program; and
19

20 WHEREAS, participating school districts must submit updated capital facilities
21 plans to the County for review and adoption before December 31, 2024, to maintain or
22 re-establish their eligibility to receive school impact fees after December 31, 2024; and
23

24 WHEREAS, the Index School District No. 63, Darrington School District No. 330,
25 Marysville School District No. 25, and Stanwood/Camano Island School District No. 401
26 have not submitted school capital facilities plans for this 2024 update; and
27

28 WHEREAS, the Arlington School District No. 16, Edmonds School District No.
29 15, Everett School District No. 2, Granite Falls School District No.332, Lake Stevens
30 School District No. 4, Lakewood School District No. 306, Monroe School District No.
31 103, Mukilteo School District No. 6, Northshore School District No. 417, Snohomish
32 School District No. 201, and Sultan School District No. 311 each submitted an updated
33 capital facilities plan to the Snohomish County Department of Planning and
34 Development Services (PDS) pursuant to SCC 30.66C.035; and
35

36 WHEREAS, PDS has reviewed the 2024 capital facility plans of the
37 aforementioned eleven school districts (collectively referred to as the "Districts"),
38 including the impact fee calculations using SCC 30.66C.045, consulted with the school
39 technical review committee authorized by SCC 30.66C.050(3), and determined that
40 each 2024 capital facilities plan meets the requirements of SCC 30.66C.040 and
41 Appendix F of the GMACP - General Policy Plan (GPP); and
42

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

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1
2 WHEREAS, SCC 30.66C.020 provides that any school capital facilities plan
3 adopted by the Snohomish County Council (“County Council”) shall be incorporated by
4 reference into the capital facilities element of the GMACP; and
5

6 WHEREAS, the Snohomish County Planning Commission (“the Planning
7 Commission”) held a public hearing on August 27, 2024, on the Districts’ 2024 capital
8 facilities plans and the proposed amended impact fee schedule; and
9

10 WHEREAS, at the conclusion of the public hearing, the Planning Commission
11 voted to recommend adoption of each of the Districts’ 2024 capital facilities plans and
12 proposed an amended impact fee schedule as shown in its recommendation letter
13 dated _____, 2024; and
14

15 WHEREAS, on _____, 2024, the County Council held a public hearing
16 after proper notice, received public testimony related to this Ordinance No. 24-____,
17 and considered the entire record, including the Planning Commission’s
18 recommendations; and
19

20 WHEREAS, following the public hearing on _____, 2024, the County
21 Council deliberated on this Ordinance No. 24-____; and
22

23 WHEREAS, the County Council considered the entire hearing record, including
24 the Planning Commission’s recommendation and written and oral testimony submitted
25 during the public hearings;
26

27 NOW, THEREFORE, BE IT ORDAINED:
28

29 Section 1. The County Council adopts the foregoing recitals as findings of fact
30 as if set forth in full herein.
31

32 Section 2. The County Council makes the following additional findings of fact in
33 support of this ordinance:
34

35 A. A school district must prepare and adopt a capital facilities plan that meets
36 the requirements of Chapter 36.70A RCW and RCW 82.02.020 to participate in the
37 impact fee program. A school district’s capital facilities plan expires two years from the
38 date of its effective date or when the County Council adopts an updated capital facilities
39 plan that meets the requirements of Chapter 30.66C SCC and the GMA.
40

41 B. The Districts submitted capital facilities plans to PDS for the 2024 biennial
42 update as required under SCC 30.66C.035.
43

44 C. Index School District No. 63, Darrington School District No. 330, Marysville
45 School District No. 25, and Stanwood/Camano Island School District No. 401 did not

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1 submit capital facilities plans for the period for this 2024 biennial update meaning the
2 County will not collect impact fees for those districts during the 2025 -2026 biennial
3 period.
4

5 D. PDS reviewed each of the Districts' 2024 capital facilities plans, including the
6 impact fee calculations, using the formula in SCC 30.66C.045 and determined that each
7 capital facilities plan meets the requirements of SCC 30.66C.040. This determination
8 was made after consultation with the school technical review committee that reviewed
9 each capital facilities plan prior to the Planning Commission's public hearing.
10

11 E. This ordinance is adopted to implement Chapter 30.66C SCC and to adopt
12 the Districts' 2024 capital facilities plans.
13

14 F. The adoption of this ordinance exercises the County's authority to impose
15 impact fees pursuant to RCW 82.02.050.
16

17 G. The Districts' 2024 capital facilities plans adopted herein will further the goals
18 of the GMA by providing adequate public-school facilities to accommodate growth.
19

20 H. Amendment of SCC 30.66C.100 is necessary to adopt an updated impact fee
21 schedule consistent with the Districts' 2024 capital facilities plans.
22

23 I. Pursuant to SCC 30.66C.100, the County reduces the amount of the impact
24 fee calculated by the Districts by fifty percent.
25

26 J. SEPA requirements have been satisfied by each school district, acting as lead
27 agency, completing an environmental checklist and issuing a Determination of
28 Nonsignificance for its capital facilities plan. The County adopts and incorporates by
29 this reference the SEPA determinations made by the respective school districts.
30

31 K. The Planning Commission reviewed the Districts' 2024 capital facilities plans,
32 conducted a public hearing on each 2024 capital facilities plan and made its
33 recommendation as evidenced in its recommendation letter dated _____, 2024.
34

35 L. The County Council conducted a public hearing on _____, 2024,
36 on this Ordinance No. 24-____.
37

38 Section 3. The County Council makes the following conclusions:
39

40 A. The Districts' 2024 capital facilities plans each individually meet the
41 requirements of Chapter 30.66C SCC and the requirements of Appendix F of the GPP
42 concerning the operation and administration of a school impact fee program.
43

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1 B. The public participation requirements of the SCC and GMA have been met
2 through the public hearings conducted by the Planning Commission and the County
3 Council.

4
5 C. The SEPA requirements for the Districts' 2024 capital facilities plans have
6 been met.

7
8 D. The adoption of the Districts' capital facilities plans is consistent with the
9 GMACP, the Countywide Planning Policies for Snohomish County, and the GMA.

10
11 E. The GMA allows the County to amend the GMACP more frequently than once
12 per year if the amendment is to the capital facilities element and occurs concurrently
13 with the adoption or amendment of the County's budget. This criterion is met because
14 this ordinance will be considered concurrently with the County's annual budget
15 ordinance, fulfilling the GMA, the Snohomish County Charter, and SCC requirements
16 that link the capital improvement program to the budget.

17
18 F. Each of the Districts' 2024 capital facilities plans shall be incorporated by
19 reference into the capital facilities element of the GMACP as provided by SCC
20 30.66C.055.

21
22 Section 4. Arlington School District No. 16's 2024-2029 Capital Facilities Plan,
23 attached as Exhibit A-1, is adopted and incorporated herein by reference as if set forth
24 in full and replaces the 2022-2027 Capital Facilities Plan adopted by Ordinance No. 22-
25 057, based on the foregoing findings and conclusions.

26
27 Section 5. Edmonds School District No. 15's 2024-2029 Capital Facilities Plan,
28 attached as Exhibit A-2, is adopted and incorporated herein by reference as if set forth
29 in full and replaces the 2022-2027 Capital Facilities Plan adopted by Ordinance No. 22-
30 057, based on the foregoing findings and conclusions.

31
32 Section 6. Everett School District No. 2's 2024-2029 Capital Facilities Plan,
33 attached as Exhibit A-3, is adopted and incorporated herein by reference as if set forth
34 in full and replaces the 2022-2027 Capital Facilities Plan adopted by Ordinance No. 22-
35 057, based on the foregoing findings and conclusions.

36
37 Section 7. Granite Falls School District No. 332's 2024-2029 Capital Facilities
38 Plan, attached as Exhibit A-4, is adopted and incorporated herein by reference as if set
39 forth in full, based on the foregoing findings and conclusions.

40
41 Section 8. Lake Stevens School District No. 4's 2024-2029 Capital Facilities
42 Plan, attached as Exhibit A-5, is adopted and incorporated herein by reference as if set
43 forth in full and replaces the 2022-2027 Capital Facilities Plan adopted by Ordinance
44 No. 22-057, based on the foregoing findings and conclusions.

45
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1 Section 9. Lakewood School District No. 306's 2024-2029 Capital Facilities Plan,
2 attached as Exhibit A-6, is adopted and incorporated herein by reference as if set forth
3 in full and replaces the 2022-2027 Capital Facilities Plan adopted by Ordinance No. 22-
4 057, based on the foregoing findings and conclusions.
5

6 Section 10. Monroe School District No. 103's 2024-2029 Capital Facilities Plan,
7 attached as Exhibit A-7, is adopted and incorporated herein by reference as if set forth
8 in full and replaces the 2022-2027 Capital Facilities Plan adopted by Ordinance No. 22-
9 057, based on the foregoing findings and conclusions.
10

11 Section 11. Mukilteo School District No. 6's 2024-2029 Capital Facilities Plan,
12 attached as Exhibit A-8, is adopted and incorporated herein by reference as if set forth
13 in full and replaces the 2022-2027 Capital Facilities Plan adopted by Ordinance No. 22-
14 057, based on the foregoing findings and conclusions.
15

16 Section 12. Northshore School District No. 417's 2024-2030 Capital Facilities
17 Plan, attached as Exhibit A-9, is adopted and incorporated herein by reference as if set
18 forth in full and replaces the 2022-2028 Capital Facilities Plan adopted by Ordinance
19 No. 22-057, based on the foregoing findings and conclusions.
20

21 Section 13. Snohomish School District No. 201's 2024-2029 Capital Facilities
22 Plan, attached as Exhibit A-10, is adopted and incorporated herein by reference as if set
23 forth in full and replaces the 2022-2027 Capital Facilities Plan adopted by Ordinance
24 No. 22-057, based on the foregoing findings and conclusions.
25

26 Section 14. Sultan School District No. 311's 2024-2029 Capital Facilities Plan,
27 attached as Exhibit A-11, is adopted and incorporated herein by reference as if set forth
28 in full and replaces the 2022-2027 Capital Facilities Plan adopted by Ordinance No. 22-
29 057, based on the foregoing findings and conclusions.
30

31 Section 15. Each of the Districts' capital facilities plans adopted by this
32 ordinance shall remain in effect for a period of two years from the effective date of this
33 ordinance, unless an updated plan is submitted and approved prior to that date
34 pursuant to the requirements of Chapter 30.66C SCC and the GMA.
35

36 Section 16. Snohomish County Code Section 30.66C.100, last amended by
37 Ordinance No. 22-057 on, November 9, 2022, is hereby amended to read:
38

39 **30.66C.100 Fee required.**
40

41
42 (1) Each development, as a condition of approval, shall be subject to the school impact
43 fee established pursuant to this chapter. The school impact fee shall be calculated in
44 accordance with the formula established in SCC 30.66C.045.

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

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

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

(5) The fees set forth in Table 30.66C.100(1) apply to developments that vest to county development regulations from January 1, ~~((2023))~~ 2025, to December 31, ~~((2024))~~ 2026.

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

Table 30.66C.100(1) School Impact Mitigation Fees

| SCHOOL DISTRICT | SINGLE FAMILY per dwelling unit | MULTI-FAMILY 1-BEDROOM per dwelling unit | MULTI-FAMILY 2+ BEDROOMS per dwelling unit | DUPLEXES AND TOWNHOMES per dwelling unit |
|-------------------------|--|---|---|---|
| Arlington No. 16 | ((\$4,002)) <u>\$544</u> | \$0 | ((\$2,328)) <u>\$0</u> | ((\$2,328)) <u>\$441</u> |
| Edmonds No. 15 | \$0 | \$0 | \$0 | \$0 |
| Everett No. 2 | ((\$6,286)) <u>\$12,556</u> | \$0 | ((\$3,834)) <u>\$4,257</u> | ((\$3,834)) <u>\$4,257</u> |
| <u>Granite</u> | <u>\$6,368</u> | <u>\$0</u> | <u>\$3,160</u> | <u>\$3,160</u> |

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| 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 |
|--------------------------------|--------------------------------------|--|--|--|
| <u>Falls No.</u> | | | | |
| Lake Stevens No. 4 | (((\$11,434)) <u>\$13,730</u> | \$0 | (((\$2,526)) <u>\$741</u> | (((\$2,526)) <u>\$2,627</u> |
| Lakewood No. 306 | \$0 | \$0 | \$0 | \$0 |
| (Marysville No. 25) | (((\$0)) | (((\$0)) | (((\$0)) | (((\$0)) |
| Monroe No. 103 | (((\$2,961)) <u>\$0</u> | \$0 | (((\$2,112)) <u>\$0</u> | (((\$2,112)) <u>\$0</u> |
| Mukilteo No. 6 | (((\$1,121)) <u>\$0</u> | (((\$700)) <u>\$1,148</u> | (((\$11,846)) <u>\$2,985</u> | (((\$11,846)) <u>\$0</u> |
| Northshore No. 417 | (((\$17,963)) <u>\$15,159</u> | \$0 | (((\$0)) <u>\$254</u> | (((\$7,152)) <u>\$5,414</u> |
| Snohomish No. 201 | (((\$6,495)) <u>\$5,361</u> | \$0 | (((\$4,514)) <u>\$1,357</u> | (((\$4,514)) <u>\$5,462</u> |
| Sultan No. 311 | (((\$14,842)) <u>\$14,002</u> | \$0 | (((\$9,576)) <u>\$7,161</u> | (((\$9,576)) <u>\$7,161</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, 2025.

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1 Section 19. If any section, sentence, clause or phrase of this ordinance shall be
2 held to be invalid or unconstitutional by the Growth Management Hearings Board
3 ("Board") or a court of competent jurisdiction, such invalidity or unconstitutionality shall
4 not affect the validity or constitutionality of any other section, sentence, clause or phrase
5 of this ordinance. Provided, however, if any section, sentence, clause or phrase of this
6 ordinance is held to be invalid or unconstitutional by the Board or court of competent
7 jurisdiction, then the section, sentence, clause or phrase in effect prior to the effective
8 date of this ordinance shall be in full force and effect for that individual section,
9 sentence, clause or phrase as if this ordinance had never been adopted.

10
11
12 PASSED this ____ day of _____, 2024.

13
14 SNOHOMISH COUNTY COUNCIL
15 Snohomish County, Washington

16
17 _____
18 Chairperson

19
20 ATTEST:

21
22 _____
23 Clerk of the Council

24
25 () APPROVED
26 () VETOED
27 () EMERGENCY

28
29 DATE: _____, 2024

30
31 _____
32 Snohomish County Executive

33
34 ATTEST:

35
36 Approved as to form only:

37  7/19/24
38 _____
39 Deputy Prosecuting Attorney

40
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ARLINGTON PUBLIC SCHOOLS
CAPITAL FACILITIES PLAN
2024-2029



ARLINGTON
PUBLIC SCHOOLS
EDUCATE • PREPARE • INSPIRE

Presented for Board Approval: July 8, 2024

ARLINGTON PUBLIC SCHOOLS
CAPITAL FACILITIES PLAN
2024-2029

BOARD OF DIRECTORS

Mary Levesque, President
Erica Knapp, Vice President
Matt Dimond
Sheri Kelly
Director District #3 - Vacant

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 Avenue, Arlington, WA 98223. Telephone: (360) 618-6200.

Presented to the Board of Directors for Approval on July 8, 2024

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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.

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 (2024-2029).

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.

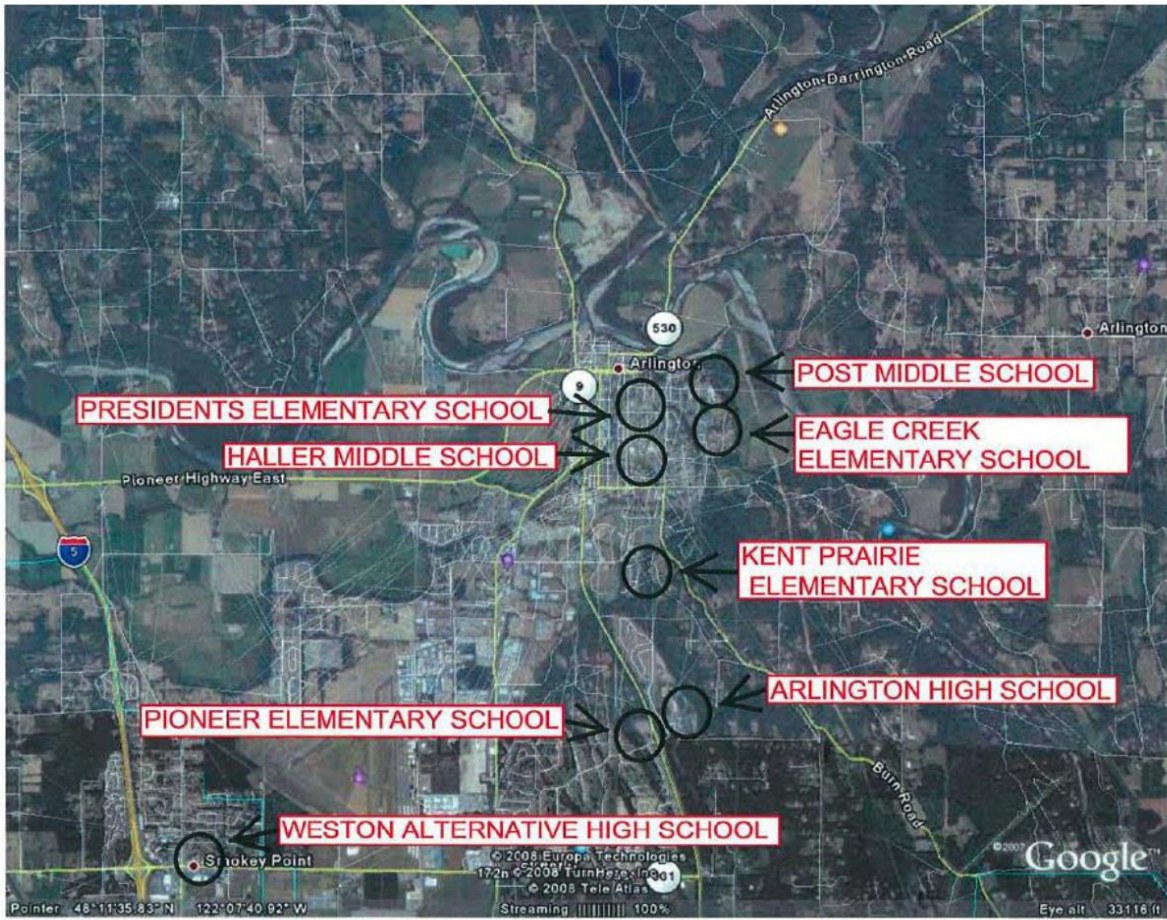
B. Overview of Arlington Public Schools

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 5,466 (October 1, 2023 HC 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, enrollment in the Stillaguamish Valley School (a home school support facility serving grades K-12), the alternative high school (Weston), and the Arlington Online Program (AOP) is not 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. Similar to school districts nationwide, the COVID-19 pandemic affected student enrollment. The District saw a drop in enrollment starting in the 2020-21 school year but enrollment has increased each year since. The District anticipates that enrollment will return to pre-pandemic projections and continue to grow over the six-year planning period. This 2024 update builds on the 2022 CFP and identifies growth-related projects at the middle school level. The District in 2022 completed construction of an addition at Arlington High School, which continues to provide new capacity needed to serve students generated from new growth.

FIGURE 1 - MAP OF FACILITIES



ARLINGTON SCHOOL DISTRICT #16 FACILITIES MAP

Annotations to District Map:

| Site Name | Site Type | Street Address | City | State | Zip |
|--|---------------|-------------------------|-----------|-------|-------|
| District Office | Support | 315 N French Ave | Arlington | WA | 98223 |
| Support Services, Old High School Building | Support | 135 S French Ave | Arlington | WA | 98223 |
| Transportation Center | Support | 19124 63rd Ave NE | Arlington | WA | 98223 |
| Arlington High School | Instructional | 18821 Crown Ridge Blvd. | Arlington | WA | 98223 |
| Weston High School | Instructional | 4407 - 172nd Street NE | Arlington | WA | 98223 |
| Stillaguamish Valley Learning Center | Instructional | 1215 East 5th Street | Arlington | WA | 98223 |
| Haller Middle School | Instructional | 600 East 1st Street | Arlington | WA | 98223 |
| Post Middle School | Instructional | 220 East 5th Street | Arlington | WA | 98223 |
| Eagle Creek Elementary | Instructional | 1216 East 5th Street | Arlington | WA | 98223 |
| Kent Prairie Elementary | Instructional | 8110 - 207th Street NE | Arlington | WA | 98223 |
| Pioneer Elementary | Instructional | 8213 Eaglefield Drive | Arlington | WA | 98223 |
| Presidents Elementary | Instructional | 505 East 3rd Street | Arlington | WA | 98223 |

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 students with special needs; 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 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 |
| | 26 | 20.06 | 26 | 19.09 | 32 | 28.24 |

* 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.

| | | | | | | |
|------------------------|--|--|-----------------------------------|------------------------------------|---------------------------------|----------------------------------|
| 2022-23 School Year | | | | | | |
| LOS Standard | MINIMUM LOS# Elementary | REPORTED LOS Elementary | MINIMUM LOS Middle | REPORTED LOS Middle | MINIMUM LOS High | REPORTED LOS High |
| | 26 | 20.70 | 26 | 19.31 | 32 | 28.63 |

* 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**

| Elementary School | Site Size (Acres) | Building Area (Square Feet) | Teaching Stations | Permanent Capacity | Year Built or Remodeled |
|-------------------|----------------------|--------------------------------|----------------------|-----------------------|----------------------------|
| 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 |
| TOTAL | 66.80 | 237,231 | 112 | 2,502 | |

**Table 2
Middle School Inventory**

| Middle School | Site Size (Acres) | Building Area (Square Feet) | Teaching Stations* | Permanent Capacity | Year Built or Remodeled |
|----------------------|------------------------------|--|-------------------------------|-------------------------------|------------------------------------|
| Post Middle | 24.60 | 76,323 | 36 | 757 | 1993 |
| Haller Middle | 25.46 | 86,002 | 31 | 612 | 2006 |
| TOTAL | 50.06 | 162,325 | 67 | 1,369 | |

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

**Table 3
High School Inventory**

| High School | Site Size (Acres) | Building Area (Square Feet) | Teaching Stations | Permanent Capacity | Year Built or Remodeled |
|--------------------|------------------------------|--|------------------------------|-------------------------------|------------------------------------|
| Arlington High | 54.00 | 273,871 | 63 | 2,036 | 2003; 2022 |

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 seventeen 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 and a single classroom ranges in size from approximately 700 to 900 square feet. See Table 11 for total portable square footage by grade level. The District’s relocatable classrooms have adequate useful remaining life and are evaluated regularly. Current use for the 2023-24 school year of relocatable classrooms throughout the District is summarized in Table 4.

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

| Elementary School | Relocatables | Interim Capacity |
|--------------------------|---------------------|-------------------------|
| Eagle Creek | 6 | 150 |
| Kent Prairie | 4 | 84 |
| Presidents | 2 | 58 |
| Middle School | Relocatables | Interim Capacity |
| Post Middle | 4 | 113 |
| High School | Relocatables | Interim Capacity |
| Arlington High | 1 | 32 |
| TOTAL | 17 | 437 |

C. Support Facilities

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

**Table 5
Support Facility Inventory**

| Facility | Building Area (Square Feet) | Site Location | Address |
|-------------------------------------|------------------------------------|--------------------------------|-------------------------------|
| Administration and Special Programs | 21,402 | Roosevelt Building, Presidents | 315 N. French Ave |
| Transportation | 41,550 | Leased | 19124 63 rd Ave Ne |
| Support Services | 70,991 | Old HS "A" Bldg | 135 S. French Ave |

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, is an alternative learning program serving on-line students and on-site K-8 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 inventory¹.

¹ 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 2024-2029*

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. The cohort method has not proven to be a reliable measure for the Arlington School District. It uses a weighted average of the most recent years to project enrollment and is not designed to anticipate fluctuations in development patterns or isolated variances in student enrollment. This deficiency is exacerbated by enrollment anomalies that occurred as a result of the COVID pandemic, particularly in 2020. For information purposes only, the OSPI cohort survival projections are included in Appendix A-1.

The District prepared modified cohort survival projections using work from 2022 from an outside demographer, FLO Analytics, that considered 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. It also considered the impacts of the pandemic on enrollment. The District updated that analysis with current information. See Appendix A-2. Using the District’s enrollment projections, the District anticipates an increase in enrollment of approximately 6.92% by the 2029-30 school year, with growth occurring at the elementary and high school grade levels.

OFM population-based enrollment projections were estimated for the District using OFM population forecasts as adopted by Snohomish County. Between 2020 and 2023, the District’s enrollment constituted 15.75% of the total population in the District. Using this percentage, a total enrollment of 6,082 HC students is projected in 2029.

**Table 6
Projected Student Enrollment
2023-2029**

| | | | | | | | | Change | % Change |
|-------------------|--------------|-------------|-------------|-------------|-------------|-------------|-------------|---------------|-----------------|
| Projection | 2023* | 2024 | 2025 | 2026 | 2027 | 2028 | 2029 | 23-29 | 23-29 |
| District | 5,466 | 5,450 | 5,491 | 5,591 | 5,662 | 5,768 | 5,844 | 378 | 6.92% |
| OFM/County | 5,466 | 5,569 | 5,672 | 5,775 | 5,878 | 5,981 | 6,082 | 616 | 11% |

* Actual October 2023 HC enrollment

The District uses the adjusted District demographer’s enrollment 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. 2044 Enrollment Projections

Student enrollment projections beyond 2029 are highly speculative. Based on OFM/County data for 2029 and an estimated student-to-population ratio of 15.75%, 7,402 HC students are projected for 2044. 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 2044² 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)
2044

| Grade Span | Projected Enrollment |
|---------------------|-----------------------------|
| Elementary (K-5) | 3,257 |
| Middle School (6-8) | 1,703 |
| High School (9-12) | 2,442 |
| TOTAL (K-12) | 7,402 |

² Snohomish County Planning & Development Services provided the underlying data for the 2044 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 (2024-2029). 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**

| Grade Span | 2029 Projected Unhoused Students - Total | 2029 Projected Unhoused Students – Growth Post-2021 |
|---------------------|---|--|
| Elementary (K-5) | 129 | 129 |
| Middle School (6-8) | -- | -- |
| High School (9-12) | --** | --** |
| TOTAL (K-12) | 129 | 129 |

**Growth continues at the 9-12 level but benefits from a recently constructed and front funded addition at Arlington High School.

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 2029 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
2024 - 2029

Elementary School Surplus/Deficiency

| Elementary | 2023 | 2024 | 2025 | 2026 | 2027 | 2028 | 2029 |
|----------------------|-------------|-------------|-------------|-------------|-------------|-------------|-------------|
| 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 | 2,378 | 2,351 | 2,367 | 2,428 | 2,466 | 2,552 | 2,631 |
| Surplus (Deficiency) | 124 | 151 | 135 | 74 | 36 | (50) | (129) |

Middle School Surplus/Deficiency

| Middle | 2023 | 2024 | 2025 | 2026 | 2027 | 2028 | 2029 |
|----------------------|-------------|-------------|-------------|-------------|-------------|-------------|-------------|
| 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 | 1,273 | 1,249 | 1,290 | 1,283 | 1,292 | 1,232 | 1,237 |
| Surplus (Deficiency) | 96 | 120 | 79 | 86 | 77 | 287 | 282 |

^Replacement and Expansion of Post Middle School

High School Surplus/Deficiency

| High | 2023 | 2024 | 2025 | 2026 | 2027 | 2028 | 2029 |
|----------------------|-------------|-------------|-------------|-------------|-------------|-------------|-------------|
| Existing Capacity | 2,036^ | 2,036 | 2,036 | 2,036 | 2,036 | 2,036 | 2,036 |
| Added Capacity | | | | | | | |
| Total Capacity | 2,036 | 2,036 | 2,036 | 2,036 | 2,036 | 2,036 | 2,036 |
| Enrollment | 1,815 | 1,850 | 1,835 | 1,880 | 1,905 | 1,984 | 1,975 |
| Surplus (Deficiency) | 221 | 186 | 201 | 156 | 131 | 52 | 61 |

^Includes Arlington High School Addition – 256 seats (complete summer 2022)

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.

Temporary Capacity Projects:

- The District may add additional portable facilities during the six year planning period of this CFP.

The District completed in 2022 an addition to Arlington High School that continues to provide capacity to serve growth projected through the six years of this planning period. 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 and the voters approved a \$25.1 million capital levy to its voters to fund, among other things, new classrooms and a science, technology, engineering, art and math (STEAM) workshop wing addition at Arlington High School. In February 2024, the District presented a six-year, \$26.3 million capital levy and \$95.0 million bond measure to its voters. The voters approved the capital levy, which will provide funding for, among other things, roofing, HVAC, and building preservation projects. 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. Subject to future Board action, the District anticipates presenting a funding proposal during the six years of this planning period, which would include the replacement/expansion of Post Middle School.

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 Program (SCAP) funds for specific capital projects based on a prioritization system. The District is currently eligible for state school construction assistance funds at the 62.00% level for eligible projects. The 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.

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 2024-2029. The financing components include current capital levy funds, future capital levy/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.

**Table 9
Capital Facilities Financing Plan**

Improvements Adding Permanent Capacity (Costs in Millions)

| Project | 2024 | 2025 | 2026 | 2027 | 2028 | 2029 | Total Cost | Bonds/ Levy/Other Local | State Match | Impact Fees |
|--|-----------|----------|----------|----------|----------|----------|------------|-------------------------------|----------------|----------------|
| Elementary | | | | | | | | | | |
| Potential Property Purchase | | | | | | | TBD | X | | X |
| Middle School | | | | | | | | | | |
| Post Middle School Replacement and Expansion | | \$15.830 | \$15.830 | \$15.830 | \$15.830 | \$15.830 | \$79.150 | X | X | |
| High School | | | | | | | | | | |
| Arlington High School Addition | \$8.186** | | | | | | \$8.186 | X | | X |

***Project complete summer 2022; funds reflect total costs with some funds expended in previous years.

Improvements Adding Temporary Capacity (Costs in Millions)

| Project | 2024 | 2025 | 2026 | 2027 | 2028 | 2029 | Total Cost | Bonds/ Levy/Other Local | State Match | Impact Fees |
|--------------------------------|------|------|------|------|------|------|------------|-------------------------------|----------------|----------------|
| Relocatables – various schools | | | | | | | TBD | | | X |

Noncapacity Improvements (Costs in Millions)

| Project | 2024 | 2025 | 2026 | 2027 | 2028 | 2029 | Total Cost | Bonds/ Levy/Other Local | State Match | Impact Fees |
|---|------|---------|---------|---------|---------|------|------------|-------------------------------|----------------|----------------|
| Various Schools (all grade levels) | | | | | | | | | | |
| Roofing, HVAC and paving improvements | | \$6.334 | \$6.492 | \$6.654 | \$6.821 | | \$26.301 | 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 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 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, 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 9, 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 for the first time a data set for multi-family dwelling units of one bedroom and less. However, the low rate of students residing in these units does not generate an impact fee.

- 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 dwelling 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, 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 (completed in 2022 but continuing to provide capacity for growth)

Please see Tables 9 and 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
2024**

| Housing Type | Impact Fee Per Dwelling Unit |
|---------------------------|---|
| Single Family | \$544 |
| Townhomes/Duplexes | \$441 |
| Multi-Family (2+ Bedroom) | \$0* |
| Multi-Family (1 Bedroom) | No fee (\$0) |

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

**The fee formula generates an \$88 fee for Multi-Family 2+ units. However, because Snohomish County charges the District an administrative fee per dwelling units that is nearly equal to this amount, the District is foregoing requesting the fee for this unit type.*

Table 11: Impact Fee Variables

| | | | | |
|--|----------------|----------------|---|-------------|
| Student Generation Factors – Single Family | | | Average Site Cost/Acre | N/A |
| Elementary | | .265 | | |
| Middle | | .112 | | |
| Senior | | .168 | | |
| Total | | .544 | | |
| Student Generation Factors – Townhomes/Duplexes | | | Temporary Facility Capacity | 22 |
| Elementary | | .208 | Capacity | |
| Middle | | .104 | Cost | \$300,000 |
| Senior | | .083 | | |
| Total | | .396 | | |
| Student Generation Factors – Multi Family (2+ Bdrm) | | | SCAP Funding Credit (OSPI) | |
| Elementary | | .106 | Current State Match Percentage | 62.00% |
| Middle | | .049 | Current Construction Cost Allocation (CCA) | \$375,000 |
| Senior | | .060 | | |
| Total | | .215 | | |
| Projected Student Capacity per Facility | | | District Average Assessed Value (Snohomish Co.) | |
| Arlington HS (expansion) - 256 | | | Single Family Residence | \$588,440 |
| | | | Townhome/Duplex | \$242,411 |
| | | | Multi Family (1 Bedroom) | \$175,133 |
| | | | Multi Family (2+ Bedroom) | \$242,411 |
| Required Site Acreage per Facility | | | SPI Square Footage per Student (WAC 392-343-035) | |
| Facility Construction/Cost Average | | | Elementary | 90 |
| Arlington HS (expansion) | | \$8,186,671 | Middle | 108 |
| | | | High | 130 |
| Permanent Facility Square Footage (ASD Inventory) | | | Debt Service Tax Rate for Bonds/Capital Levy (Sno Co.) | |
| Elementary | | 237,231 | Current/\$1,000 | \$0.8418972 |
| Middle | | 162,325 | | |
| Senior | | 273,871 | | |
| Total | 98.00% | 673,427 | | |
| Temporary Facility Square Footage (ASD Inventory) | | | General Obligation Bond Interest Rate (Bond Buyer) | |
| Elementary | | 7,560 | Bond Buyer Index (avg 2/24) | 3.48% |
| Middle | | 3,356 | | |
| Senior | | 839 | | |
| Total | 2.00% | 11,755 | | |
| Total Facility Square Footage | | | Developer Provided Sites/Facilities | |
| Elementary | | 244,791 | Value | 0 |
| Middle | | 165,681 | Dwelling Units | 0 |
| Senior | | 274,710 | | |
| Total | 100.00% | 685,182 | | |

APPENDIX A

POPULATION AND ENROLLMENT DATA

**OSPI Cohort Projections
Form 1049 (Printed February 2024)**

| School District | Grade | 2018 Actual | 2019 Actual | 2020 Actual | 2021 Actual | 2022 Actual | 2023 Actual | Survival Percentage | 2024 Projected | 2025 Projected | 2026 Projected | 2027 Projected | 2028 Projected | 2029 Projected |
|-----------------|--------------|----------------|----------------|----------------|----------------|----------------|----------------|------------------------|-------------------|-------------------|-------------------|-------------------|-------------------|-------------------|
| Arlington | Kindergarten | 386 | 426 | 330 | 335 | 337 | 367 | | 328 | 318 | 307 | 297 | 287 | 277 |
| Arlington | Grade 1 | 409 | 403 | 392 | 350 | 390 | 367 | 105.55 | 387 | 346 | 336 | 324 | 313 | 303 |
| Arlington | Grade 2 | 394 | 414 | 360 | 404 | 367 | 411 | 100.76 | 370 | 390 | 349 | 339 | 326 | 315 |
| Arlington | Grade 3 | 423 | 406 | 385 | 389 | 421 | 378 | 102.25 | 420 | 378 | 399 | 357 | 347 | 333 |
| Arlington | Grade 4 | 423 | 432 | 375 | 388 | 406 | 440 | 100.82 | 381 | 423 | 381 | 402 | 360 | 350 |
| Arlington | Grade 5 | 424 | 437 | 405 | 381 | 397 | 415 | 100.63 | 443 | 383 | 426 | 383 | 405 | 362 |
| Arlington | Grade 6 | 473 | 441 | 424 | 434 | 407 | 415 | 103.90 | 431 | 460 | 398 | 443 | 398 | 421 |
| Arlington | Grade 7 | 416 | 486 | 398 | 431 | 433 | 421 | 99.56 | 413 | 429 | 458 | 396 | 441 | 396 |
| Arlington | Grade 8 | 458 | 416 | 464 | 414 | 454 | 437 | 101.14 | 426 | 418 | 434 | 463 | 401 | 446 |
| Arlington | Grade 9 | 457 | 489 | 402 | 495 | 439 | 474 | 104.10 | 455 | 443 | 435 | 452 | 482 | 417 |
| Arlington | Grade 10 | 435 | 463 | 468 | 404 | 506 | 435 | 99.76 | 473 | 454 | 442 | 434 | 451 | 481 |
| Arlington | Grade 11 | 422 | 402 | 430 | 448 | 400 | 498 | 95.68 | 416 | 453 | 434 | 423 | 415 | 432 |
| Arlington | Grade 12 | 430 | 431 | 406 | 432 | 459 | 408 | 101.60 | 506 | 423 | 460 | 441 | 430 | 422 |
| Arlington | Total | 5,550 | 5,646 | 5,239 | 5,305 | 5,416 | 5,466 | | 5,449 | 5,318 | 5,259 | 5,154 | 5,056 | 4,955 |

DISTRICT ENROLLMENT PROJECTIONS

Arlington Public Schools
 Estimated October Headcount

| October Headcount | 2024-2025 | 2025-2026 | 2026-2027 | 2027-2028 | 2028-2029 | 2029-2030 |
|--------------------|--------------|--------------|--------------|--------------|--------------|--------------|
| Kindergarten | 372 | 397 | 391 | 399 | 405 | 411 |
| 1st Grade | 376 | 411 | 437 | 431 | 440 | 446 |
| 2nd Grade | 366 | 379 | 415 | 442 | 435 | 444 |
| 3rd Grade | 414 | 374 | 388 | 424 | 452 | 445 |
| 4th Grade | 384 | 414 | 375 | 389 | 425 | 453 |
| 5th Grade | 439 | 391 | 422 | 382 | 396 | 433 |
| 6th Grade | 422 | 448 | 399 | 430 | 389 | 403 |
| 7th Grade | 409 | 425 | 451 | 402 | 433 | 392 |
| 8th Grade | 418 | 417 | 433 | 460 | 410 | 442 |
| 9th Grade | 441 | 471 | 471 | 488 | 518 | 462 |
| 10th Grade | 466 | 444 | 474 | 474 | 492 | 522 |
| 11th Grade | 437 | 475 | 452 | 483 | 483 | 501 |
| 12th Grade | 505 | 445 | 483 | 460 | 491 | 491 |
| Total FTE's | 5,450 | 5,491 | 5,591 | 5,662 | 5,768 | 5,844 |

Source:

For grades 1-12: District maintained enrollment changes by grade and by month

For grades K: Flo Analytics demographic study 2022–23 to 2031–32 Enrollment Forecasts Report—Arlington Public Schools

APPENDIX B

STUDENT GENERATION FACTOR REVIEW



MEMORANDUM

To: Brian Lewis
Arlington Public Schools
315 N French Ave.
Arlington, WA 98223

Date: April 3, 2024

Project No.: F2116.01.003

From: Alex Brasch
Senior Population Geographer

Re: 2023–24 Student Generation Rates—Arlington Public Schools

At the request of the Arlington Public Schools (APS/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 APS K–12 students (October 2023 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 APS 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.

FLO Analytics | 1-888-847-0299 | www.flo-analytics.com

R:\F2116.01 Arlington Public Schools\003_2024.04.03 SGR Memo\Arlington SD 2023 SGR Memo.docx
© 2024 FLO Analytics

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 4,850 students residing within the district, 370 live in the 680 SF detached units that were built between 2015 and 2022, while 38 live in the 96 townhomes/duplexes and 140 live in the 651 MF units built in the same period. On average, each SF detached unit yields 0.544 K–12 students, each townhome/duplex yields 0.396 K–12 students, and each MF unit yields 0.215 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 | 680 | 180 | 76 | 114 | 370 | 0.265 | 0.112 | 0.168 | 0.544 |
| Townhome / Duplex ^(a) | 96 | 20 | 10 | 8 | 38 | 0.208 | 0.104 | 0.083 | 0.396 |
| Multifamily ^(b) | 651 | 69 | 32 | 39 | 140 | 0.106 | 0.049 | 0.060 | 0.215 |

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

Arlington Public Schools 2023–24 headcount enrollment, Snohomish County parcels, and Puget Sound Regional Council 2015–2022 new housing inventory.



APPENDIX C

SCHOOL IMPACT FEE CALCULATIONS

| SCHOOL IMPACT FEE CALCULATIONS | | | | | | | | | |
|---|---------------------------------------|--------------|----------|--------------|--------------|--------------|----------------|----------------|----------------|
| DISTRICT | Arlington School District | | | | | | | | |
| YEAR | 2024 | | | | | | | | |
| School Site Acquisition Cost: | | | | | | | | | |
| ((AcresxCost per Acre)/Facility Capacity)xStudent Generation Factor | | | | | | | | | |
| | Facility | Cost/ | Facility | Student | Student | Student | Cost/ | Cost/ | Cost/ |
| | Acres | Acre | Capacity | SFR | TH/Duplex | MFR (2+) | SFR | TH/Duplex | MFR (2+) |
| Elementary | 15.00 | \$ - | 550 | 0.265 | 0.208 | 0.106 | \$0 | \$0 | \$0 |
| Middle | 20.00 | \$ - | 907 | 0.112 | 0.104 | 0.048 | \$0 | \$0 | \$0 |
| High | 40.00 | \$ - | 256 | 0.168 | 0.083 | 0.060 | \$0 | \$0 | \$0 |
| | | | | | | TOTAL | \$0 | \$0 | \$0 |
| School Construction Cost: | | | | | | | | | |
| ((Facility Cost/Facility Capacity)xStudent Generation Factor)x(permanent/Total Sq Ft) | | | | | | | | | |
| | %Perm/ | Facility | Facility | Student | Student | Student | Cost/ | Cost/ | Cost/ |
| | Total Sq.Ft. | Cost | Capacity | SFR | TH/Duplex | MFR (2+) | SFR | TH/Duplex | MFR (2+) |
| Elementary | 97.00% | | 550 | 0.265 | 0.208 | 0.106 | \$0 | \$0 | \$0 |
| Middle | 97.00% | \$ - | 907 | 0.112 | 0.104 | 0.048 | \$0 | \$0 | \$0 |
| High | 97.00% | \$ 8,186,671 | 256 | 0.168 | 0.083 | 0.060 | \$5,211 | \$2,575 | \$1,861 |
| | | | | | | TOTAL | \$5,211 | \$2,575 | \$1,861 |
| Temporary Facility Cost: | | | | | | | | | |
| ((Facility Cost/Facility Capacity)xStudent Generation Factor)x(Temporary/Total Square Feet) | | | | | | | | | |
| | %Temp/ | Facility | Facility | Student | Student | Student | Cost/ | Cost/ | Cost/ |
| | Total Sq.Ft. | Cost | Size | SFR | TH/Duplex | MFR (2+) | SFR | TH/Duplex | MFR (2+) |
| Elementary | 3.00% | \$ - | 25 | 0.265 | 0.208 | 0.106 | \$0 | \$0 | \$0 |
| Middle | 3.00% | \$ - | 30 | 0.112 | 0.104 | 0.048 | \$0 | \$0 | \$0 |
| High | 3.00% | \$ - | 32 | 0.168 | 0.083 | 0.060 | \$0 | \$0 | \$0 |
| | | | | | | TOTAL | \$0 | \$0 | \$0 |
| State School Construction Funding Assistance Credit: | | | | | | | | | |
| CCA X SPI Square Footage X District Funding Assistance % X Student Factor | | | | | | | | | |
| | CCA | SPI | Funding | Student | Student | Student | Cost/ | Cost/ | Cost/ |
| | | Footage | Asst % | SFR | TH/Duplex | MFR (2+) | SFR | TH/Duplex | MFR (2+) |
| Elementary | \$ 375.00 | 90 | 0.00% | 0.265 | 0.208 | 0.106 | \$0 | \$0 | \$0 |
| Middle | \$ 375.00 | 108 | 0.00% | 0.112 | 0.104 | 0.048 | \$0 | \$0 | \$0 |
| High | \$ 375.00 | 130 | 0.00% | 0.168 | 0.083 | 0.060 | \$0 | \$0 | \$0 |
| | | | | | | TOTAL | \$0 | \$0 | \$0 |
| Tax Payment Credit: | | | | | | | | | |
| | Average Assessed Value | | | SFR | TH/Duplex | MFR (2+) | \$588,440 | \$242,111 | \$242,411 |
| | Capital Bond Interest Rate | | | | | | 3.48% | 3.48% | 3.48% |
| | Net Present Value of Average Dwelling | | | | | | \$4,898,760 | \$2,015,573 | \$2,018,070 |
| | Years Amortized | | | | | | 10 | 10 | 10 |
| | Property Tax Levy Rate | | | | | | \$0.84 | \$0.84 | \$0.84 |
| | Present Value of Revenue Stream | | | | | | \$4,124 | \$1,693 | \$1,695 |
| Fee Summary: | | | | | | | | | |
| | | | | Single | Townhome | Multi- | | | |
| | | | | Family | Duplex | Family (2+) | | | |
| | Site Acquisition Costs | | | \$0 | \$0 | \$0 | | | |
| | Permanent Facility Cost | | | \$5,211 | \$2,575 | \$1,861 | | | |
| | Temporary Facility Cost | | | \$0 | \$0 | \$0 | | | |
| | State SCFA Credit | | | \$0 | \$0 | \$0 | | | |
| | Tax Payment Credit | | | (\$4,124) | (\$1,693) | (\$1,695) | | | |
| | FEE (AS CALCULATED) | | | \$1,087 | \$882 | \$166 | | | |
| | Fee (AS DISCOUNTED) | | | \$544 | \$441 | \$83 | | | |



ALDERWOOD MIDDLE SCHOOL

2024 - 2029

CAPITAL FACILITIES PLAN

APPROVED
8/27/2024



**Edmonds
School District**

CAPITAL FACILITIES PLAN EDMONDS SCHOOL DISTRICT

SCHOOL BOARD MEMBERS

Nancy Katims, President

Director District 5

Thom Garrard

Director District 4

Carin Chase, Legislative Representative

Director District 1

Hawk Cramer

Director District 3

Keith Smith

Director District 2

SUPERINTENDENT

Dr. Rebecca Miner

Adopted by Board of Directors, August 27, 2024

For information on the Edmonds School District Capital Facilities Plan
contact Capital Projects at (425) 431-7163.

This document is also available at:

<https://www.edmonds.wednet.edu/our-district/capital-projects/capital-facilities-plan>

EDMONDS SCHOOL DISTRICT CAPITAL FACILITIES PLAN
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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 No. 15 (District), Snohomish County (County), other jurisdictions, and the community with a description of facilities needed to accommodate projected student enrollment at acceptable levels of service over the next twenty years (2044). It also meets the State Growth Management Act (GMA) planning requirements, the County’s GMA Comprehensive Plan, and the County Code (SCC 30.66C). A more detailed schedule and financing programs are also included describing capital improvements over the next six years (2024-2030).

Per the Growth Management Act (GMA), this CFP contains the following elements:

- Minimum level of service (LOS) and how the District is meeting that LOS
- 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.
- A description of the forecasting methodology and justification for its consistency with the Office of Financial Management population forecasts used in the county’s comprehensive plan.
- Inventory of Existing Facilities
- The proposed locations and capacities of expanded or new capital facilities Six-year plan for financing capital facilities.

Cities within the District 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.

Section 8 of this CFP addresses development fees, mitigation, and other funding sources from developers. Impact fees are not anticipated during this 2024-2029 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. This may include changes to the Plan to reduce lands available for residential development and reductions in student enrollments. The County’s update of its Plan is due in late 2024.

If impact fees are deemed desirable at some point, the District may request an amendment to this CFP during the 2024-26 biennium.

Overview of Edmonds School District

The District is the largest school district in the County and the eleventh largest of Washington's 295 public school systems. The District covers an area of 36 square miles. It currently serves a total student population (headcount, including Kindergarten) of 19,932¹, as of October 2023 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 Alternative Learning Experience (ALE) family partnership program school for grades K-12; one e-learning program; one District program for students with severe disabilities; one school for the Regional Visually-impaired Program; one K-8 serving the Regional Deaf and Hard of Hearing Program; and one high school serving the Regional Deaf and Hard of Hearing Program. The grade configuration of schools has changed over time in response to the community's desires, 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 years, approximate twenty-year planning horizons, and articulate a facility and financing plan to address those needs. This CFP replaces and supersedes the District's 2022 Capital Facilities Plan. The current projection cycle is 2024 to 2029.

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 to assist in decision-making.

The District monitors proposed new residential growth (e.g. the County Plan update) for impacts and implications to its facility planning and educational programs. The District comments, as needed, on specific proposed new developments, to ensure appropriate provisions for students are factored into the development proposal.

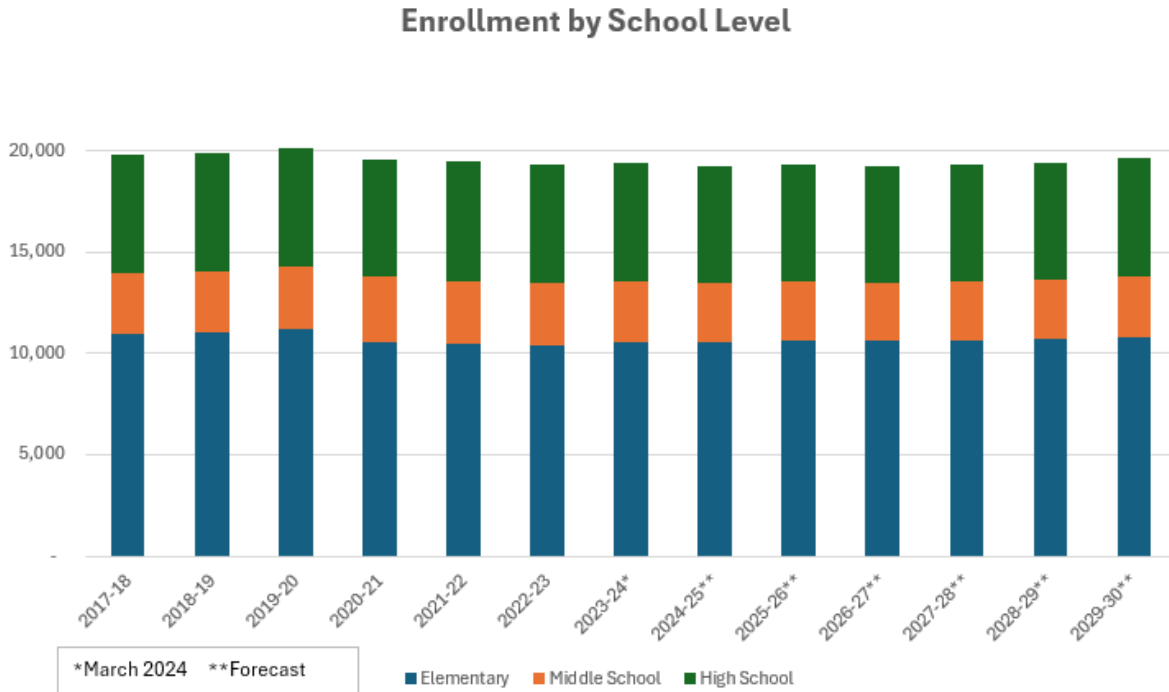
As the Urban Growth Area builds out, changes may require the District to modify its facilities (i.e., the location, design, etc.), and its educational program (i.e., school year, grade configuration, etc.). Changes would be made in consultation with the community and approved by the Board of Directors.

¹ Headcount differs from FTE in that the figure reflects the total number of students served by District educational programming, whereas, FTE is Full-Time Equivalent and adjusts for students who attend part-time. Office of the Superintendent of Public Instruction Enrollment Reporting Handbook, 2022-23

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. Since the establishment of full-day kindergarten in 2013-14, enrollment has been approximately 20,000 students. Enrollment has been relatively stable except for recent declines due to COVID-19. Enrollment declined by approximately 700 full-time equivalent students between 2019-20 and 2022-23. Enrollment for 2023-24 is slightly higher than 2022-23. Enrollment for 2022-2023 was 19,688.

Future Forecasts

The District previously engaged FloAnalytics to provide 10-year enrollment forecasts that were utilized in long-range facilities planning. For this Capital Facilities Plan, the District has updated those projections based on current year results as shown in Table 1. Table 2 shows the estimated grade level enrollments based on the projection in Table 1. Refer to Section 6 for other planned improvements.

**Table 1 – Comparison of Student Enrollment Projections
Edmonds School District 2023-2029**

| Source | 2023 | 2024* | 2025 | 2026 | 2027 | 2028 | 2029 |
|------------|--------|--------|--------|--------|--------|--------|--------|
| Actual | 19,688 | 19,817 | | | | | |
| Projection | | | 19,789 | 19,810 | 19,766 | 19,847 | 19,866 |

* = March 2024

**Table 2 – Projected Student Enrollment by Grade Span
Edmonds School District 2023-2029**

| Grade Span | Actual | | Projected | | | | | Change 2023-29 | % Change |
|--------------------------------|---------------|---------------|---------------|---------------|---------------|---------------|---------------|-------------------|-------------|
| | 2023 | 2024* | 2025 | 2026 | 2027 | 2028 | 2029 | | |
| Elementary (K-6) | 10,460 | 10,582 | 10,590 | 10,572 | 10,578 | 10,616 | 10,711 | 251 | 2.40% |
| Middle School (7-8) | 3,022 | 2,966 | 2,946 | 2,950 | 2,935 | 2,950 | 2,936 | -86 | -2.80% |
| High School (9-12) | 6,206 | 6,269 | 6,253 | 6,288 | 6,253 | 6,281 | 6,219 | 13 | .20% |
| Total | 19,688 | 19,817 | 19,789 | 19,810 | 19,766 | 19,847 | 19,866 | 178 | .90% |

* = March 2024

2044 Student Enrollment Projection

School districts monitor long-range population growth trends as a general guide to future enrollment forecasting. While the accuracy of future projections diminishes the further out into the future they go, they do provide some indication of what buildings may be needed and what future land purchases may be needed as new residential development is built within their attendance areas. These forecasts are reviewed during each biennial CFP update and adjusted accordingly.

In 2024, Snohomish County adopted future population estimates through 2044 as part of its Growth Management Act (GMA) responsibilities and the Vision 2050 programs organized through the Puget Sound Regional Council (PSRC). The County and its cities must update their comprehensive plan, in 2024. The planning horizon year for that update is 2044.

Area Population Estimates

The County’s population estimate was used for the 2044 long-range enrollment estimate, where assumptions are made of what proportion of the official population forecast will be students.

For future planning purposes, the District assumes that the trend will decrease from the forecasted 2029 of 9.5% and continue to decrease to 8.1% by 2044. Applying that ratio to the County’s official 2044 population estimate of 263,675, the enrollment estimate for that year is 21,339 (Table 3).

Table 3 – Student/Population Ratios

| | Population | Enrollment | Ratio |
|-------------|------------|------------|-------|
| 2023 | 185,354 | 19,688 | 10.6% |
| 2029 | 209,794 | 19,866 | 9.5% |
| 2044 | 263,675 | 21,339 | 8.1% |

Student Generation Rates

Student Generation Rates (SGRs) 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 a previous demographer’s report at .36 students per Single Family home and .20 students per Multi Family home.

The purpose of SGRs 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 currently. 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

| Table 4 – Enrollment Estimates | | | |
|---------------------------------------|--|---|---------------------------------|
| Grade Span | 2024 Actual Student Headcount * | 2029 Projected Student Headcount | 2044 Projected Headcount |
| Elementary (K-6) | 10,582 | 10,711 | 11,497 |
| Middle School (7-8) | 2,966 | 2,936 | 3,170 |
| High School (9-12) | 6,269 | 6,219 | 6,672 |
| Total | 19,817 | 19,866 | 21,339 |

* = March 2024

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, 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 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 the type of educational program opportunities and grade clustering offered by the District. Refer to Section 6 for more information regarding planned improvements moving 6th grade to middle school.

The total curriculum program, including both the basic educational program and local-choice educational programs, are 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.

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-3 is 20 students and 28.2 students for grades 4-6.

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, and learning assistance programs).

Current capacity for new elementary schools is based upon a District-wide Educational Specification which assigns a range of approximately 21-28 classrooms for K-6 or K-8 basic educational programs 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 27 students in grades 7 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 can 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. These standards are used in Section 4 to determine existing and future capacities.

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.

The minimum level of service is not the District's desired level for providing education. These "minimum levels of service" in the Edmonds School District are established as an average class size no larger than the following:

Average Class Size Maximums:

24 Kindergarten

25 Grades 1-3 General Education

26 Grade 4 General Education

28 Grade 5-6 General Education

The weighted average of these values for a K-6 elementary school is 25.84.

30 Grades 7-8 General Education

31 Grades 9-12 General Education

2022-23 Actual Class Size Average – based on OSPI's Report Card for 2022-23

21 Grades K-6 General Education

25 Grades 7-8 General Education

21 Grades 9-12 General Education

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 the locations of the District's developed educational facilities is provided in Figure 2.

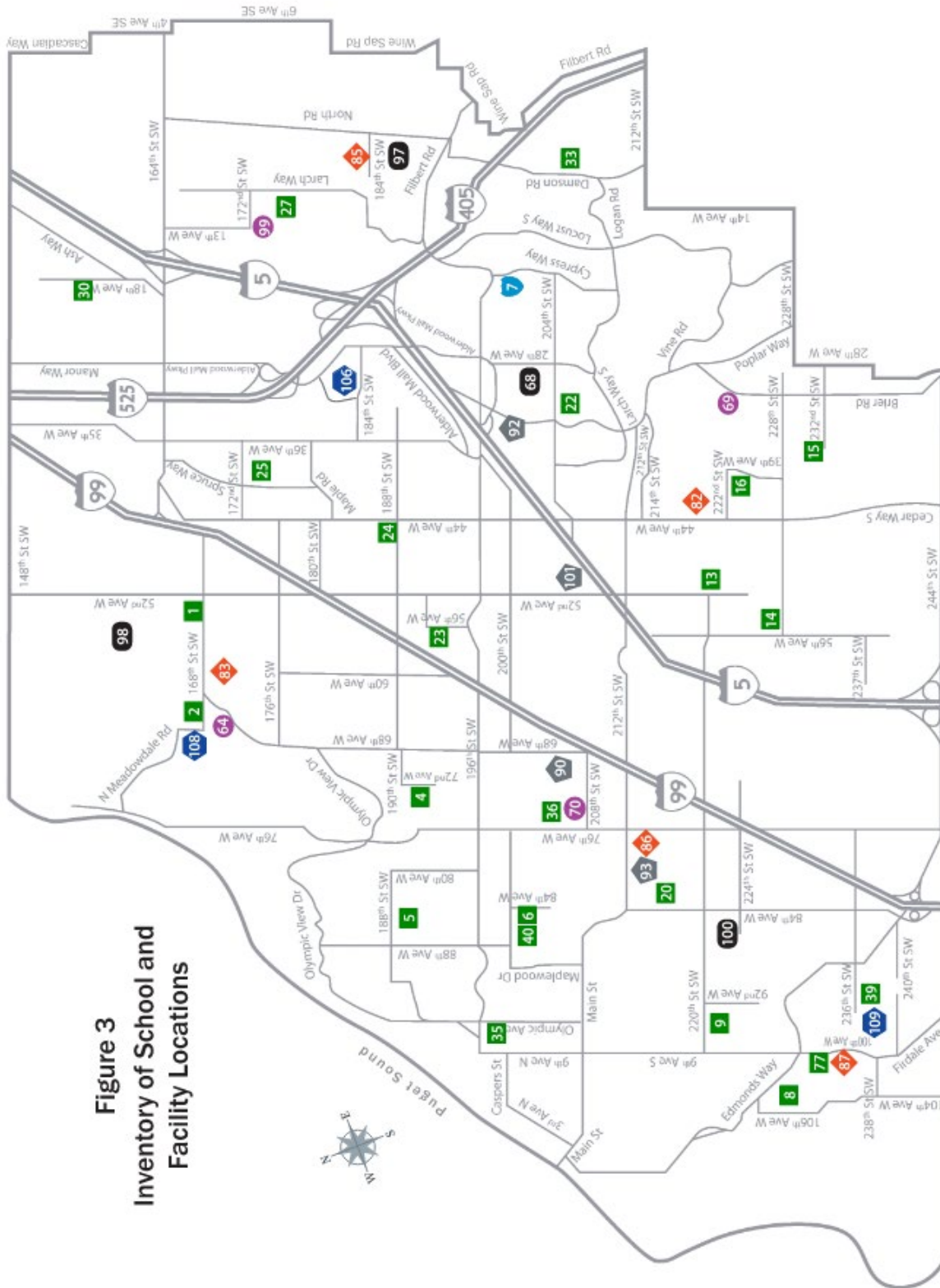
Schools

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 ALE Family Partnership program serving K-12;
- One e-learning Program;
- One visually impaired program;
- One preK-8 Deaf and Hard of Hearing program;
- One High School Deaf and Hard of Hearing Program;
- One early learning program serving ages 2-5;
- One former elementary school and one former middle school as reserve campuses for schools displaced due to construction or renovation.






Edmonds offers a District program, Maplewood, for severely developmentally and physically challenged students 5 to 21 years of age. Additionally, the district offers an inclusive preschool program. The Edmonds Preschool program is open to all children residing within the district boundaries between the ages of two to five years old by August 31. The main programming site is located at the Alderwood Early Childhood Center (AECC) in Lynnwood, with locations at Lynndale Elementary and Chase Lake Elementary schools.

Figure 2 - Inventory of School & Facility Locations



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

Edmonds School District

| | | | | |
|---|--|---|---|--------------------------------------|
|  | District Support Sites | |  | Middle Schools |
| | 90 - ESC - Educational Services Center | | | 64 - Meadowdale Middle |
| | 92 - Warehouse | | | 69 - Brier Terrace Middle |
| | 93 - Stadium | | | 70 - College Place Middle |
| | 101 - New Transportation Maintenance | | | 99 - Alderwood Middle |
|  | Undeveloped Parcels | |  | High Schools |
| | 97 - Site 28 | | | 82 - Mountlake Terrace High |
| | 98 - Site 32 | | | 83 - Meadowdale High |
| | 100 - Chase Lake Bog | | | 85 - Lynnwood High |
| | | | | 86 - Edmonds-Woodway High |
| | | | | 87 - Scriber Lake High |
|  | Developed Parcels | |  | Early Childhood |
| | 68 - Former Alderwood Middle | | | 7 - Alderwood Early Childhood Center |
| | 106 - Former Lynnwood High School (leased) | | | |
| | 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 | | |

Program Improvements and Population Growth

The District continues to review the changing nature of educational programs and classroom needs. 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 opportunities for learning. This process has been ongoing 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. The district currently uses 44 relocatables at the campuses with capacity needs. While this is a response to total additional space requirements, the assignment of how and what grade levels will use these remains flexible.

In this edition of the Capital Facilities Plan, capacity figures have been refined to mirror current educational practice.

Review of Capacity

The OSPI calculates school capacity by dividing the 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)². This method is used by the State as a simple and uniform approach to determining school capacity for purposes of allocating available State Construction Assistance 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 the 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.

² WAC 392-343-035 Space Allocation

Table 5 – Elementary School Capacity Inventory

| Elementary School | Site Size Acres | Bldg. Area (Sq. Ft.) | Year Built or Last Remodel | Total Class Rooms | Special Program class ¹. | Max Student Capacity | Maximum Program Capacity 90% | Future Capacity Improvements *** | Meets. Level of Service |
|--------------------------|------------------------|-----------------------------|-----------------------------------|--------------------------|--|-----------------------------|-------------------------------------|---|--------------------------------|
| Alderwood | 8.9 | 36,869 | 1965 | 20 | | n/a* | n/a* | | |
| Beverly | 9.1 | 48,020 | 1988 | 29 | 7 | 517 | 465 | | 21.2 |
| Brier | 10.0 | 43,919 | 1989 | 25 | 6 | 447 | 402 | | 21.2 |
| Cedar Valley | 22.1 | 64,729 | 2001 | 25 | 4 | 494 | 444 | | 21.2 |
| Cedar Way | 9.4 | 53,819 | 1993 | 31 | 5 | 611 | 550 | | 21.2 |
| Chase Lake | 10.3 | 57,697 | 2000 | 25 | 7 | 423 | 381 | | 21.2 |
| College Place | 9.0 | 48,180 | 1968 | 27 | 4 | 541 | 486 | 10 | 21.2 |
| Edmonds | 8.4 | 34,726 | 1966 | 20 | 4 | 376 | 338 | | 21.2 |
| Hazelwood | 10.3 | 51,453 | 1987 | 27 | 8 | 447 | 402 | | 21.2 |
| Hilltop | 9.8 | 49,723 | 1967 | 29 | 5 | 564 | 508 | | 21.2 |
| Lynndale | 10.0 | 69,045 | 2016 | 27 | 4 | 541 | 486 | | 21.2 |
| Lynnwood | 8.9 | 81,405 | 2018 | 29 | 5 | 564 | 508 | | 21.2 |
| Madrona K-8 | 26.9 | 78,930 | 2018 | 28 | | 680 | 612 | | |
| Maplewood K-8 | 7.4 | 76,554 | 2002 | 27 | | 656 | 590 | | |
| Martha Lake | 10.0 | 50,753 | 1993 | 28 | 7 | 494 | 444 | | 21.2 |
| Meadowdale | 9.1 | 57,111 | 2000 | 25 | 5 | 470 | 423 | | 21.2 |
| Mountlake Terrace | 8.0 | 67,379 | 2018 | 25 | 5 | 470 | 423 | | 21.2 |
| Oak Heights | 9.4 | 49,355 | 1966 | 33 | 7 | 611 | 550 | | 21.2 |
| Seaview | 8.3 | 49,420 | 1997 | 22 | 4 | 423 | 381 | | 21.2 |
| Sherwood | 13.6 | 43,284 | 1966 | 25 | 4 | 494 | 444 | | 21.2 |
| Spruce | 8.9 | 80,000 | 2022 | 32 | 5 | 635 | 571 | | 21.2 |
| Terrace Park | 15.3 | 71,664 | 2002 | 34 | 3 | 729 | 656 | | 21.2 |
| Westgate | 8.1 | 44,237 | 1989 | 26 | 6 | 470 | 423 | 30 | 21.2 |
| Woodway | 13.1 | 37,291 | 1962 | 20 | 2 | n/a** | n/a** | | |
| Totals | 264.3 | 1,345,563 | | 639 | 107 | 11,653 | 10,488 | | 21.2 |

Source: Facilities Operations Department, Edmonds School District, OSPI

1. Excluded special programs: special education

District Notes:

* 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 currently planned by the District using 2024 Bond Funding: for Oak Heights, College Place, and Westgate (See Discussion of Six-year Plan and Table 12).

Table 6 – Middle School Capacity Inventory

| Middle School | Site Size (Acres) | Building Area (Sq. Ft.) | Year Built or Last Remodel | Teaching Stations | Special Program class ^{1.} | Max Student Capacity ** | Maximum Program Capacity 83% | Future Capacity Improvements *** | Meets. Level of Service |
|-----------------------|-------------------|-------------------------|----------------------------|-------------------|-------------------------------------|-------------------------|------------------------------|----------------------------------|-------------------------|
| Alderwood | 18.9 | 114,400 | 2016 | 38 | 1 | 999 | 829.17 | | 22.4 |
| Brier Terrace | 22.7 | 89,258 | 1969 | 38 | 2 | 972 | 806.76 | | 22.4 |
| College Place | 18.7 | 87,031 | 1970 | 40 | 1 | 1053 | 873.99 | 235 | 22.4 |
| Meadowdale | 20.7 | 102,925 | 2011 | 35 | 1 | 918 | 761.94 | | 22.4 |
| Madrona – 7 & 8* | | | | | | 150 | 125 | | |
| Maplewood–7 & 8* | | | | | | 120 | 100 | | |
| New Middle School 6-8 | 19.3 | TBD | | TBD | | 0 | 0 | 1000 | |
| Totals | 100.3 | 393,614 | | 151 | 5 | 4,212 | 3,497 | | 22.4 |

Source: Facilities Operations Department, Edmonds School

1. Excluded special programs: special education

District Notes:

*Madrona K-8: Grades 7 and 8

*Maplewood K-8: Grades 7 and 8

**Maximum Capacity equals 83% utilization of total seats.

***Future improvements are currently planned by the District using 2024 Bond Funding (See Discussion of Six-year Plan and Table 12.)

Table 7 – High School Capacity Inventory

| High School | Site Size (acres) | Building Area (Sq. Ft.) | Year Built or Last Remodel | Teaching Stations | Special Program class ^{1.} | Max. Student Capacity | Max. Program Capacity 83% | Meets. Level of Service |
|-------------------|-------------------|-------------------------|----------------------------|-------------------|-------------------------------------|-----------------------|---------------------------|-------------------------|
| Edmonds-Woodway | 28.5 | 208,912 | 1998 | 64* | 2 | 1,674 | 1,389 | 22.4 |
| Lynnwood | 40.5 | 217,597 | 2009 | 64 | 2 | 1,674 | 1,389 | 22.4 |
| Meadowdale | 40.0 | 197,306 | 1998 | 59* | 1 | 1,566 | 1,300 | 22.4 |
| Mountlake Terrace | 33.2 | 211,950 | 1991 | 64* | 4 | 1,620 | 1,345 | 22.4 |
| Scriber Lake** | 39.00 | 73,965 | 2003 | 18 | | 395 | 328 | |
| Totals | 181.2 | 909,730 | | 269 | 9 | 6,929 | 5,751 | 22.4 |

Source: Facilities Operations Department, Edmonds School District

1. Excluded special programs: special education

District Notes:

* Capacity may vary depending on the educational 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.

**Edmonds Heights and Scriber Lake High programs are housed at Woodway Campus. Scriber Lake occupies buildings F and H, and shares buildings C and E.

Relocatable Classroom Facilities (Portables)

Temporary classrooms provide students with supplemental housing and may be on campus for extended periods. They may be used additionally to temporarily house students pending the construction of permanent classrooms or provide non-disruptive space for music programs. The usable life of a portable is 30 years.

As of September 1, 2024, the District has 46 relocatable classrooms, however only 44 currently are being used for educational purposes. They help with added enrollment, K-3 class reductions, and all-day Kindergarten. Most portables are less than 30 years old; some are over 30 years, but still useable. There is no immediate need for replacements.

Table 8 – 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 | 5 | | 5 | 120 |
| College Place Elementary | | 1 | 2 | 48 |
| Edmonds-Woodway High* | 3 | | 2* | 48 |
| Former Alderwood Middle | | 1 | 2 | 48 |
| Hazelwood Elementary | 1 | | 1 | 24 |
| Hilltop Elementary | 3 | 1 | 5 | 120 |
| Martha Lake | 2 | | 2 | 48 |
| Meadowdale High | 2 | 1 | 4 | 96 |
| Oak Heights Elementary | | | | |
| Sherwood Elementary | 6 | | 6 | 144 |
| Terrace Park | 2 | | 2 | 48 |
| Westgate Elementary | 2 | 1 | 4 | 96 |
| Woodway Elementary | 4 | | 4 | 96 |
| Woodway Campus* | 4 | | 2* | 48 |
| Totals | 37 | 7 | 46 | 1,152 |

* Two relocatable classrooms at Woodway Campus and one at Stadium are used for non-educational purposes.

Inventory of 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 9.

Table 9 – 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 10.

Table 10 – 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 11 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 11 – 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 |

Source: Facilities Operations Department, Edmonds School District

SECTION 5 – PROJECTED FACILITY NEEDS

Facility Needs Through 2044

Projected permanent student capacity was derived by subtracting projected student enrollment for each of the six years in the forecast period from the existing 2024 school Maximum Program Capacity as shown in Tables 5-7 with totals used in the calculation highlighted in yellow. As described above, the District counts relocatable (portable) classrooms (Table 8) in its facilities planning. The figures in Table 12 do not include those temporary capacity figures.

Table 12 – Existing and Future Capacity: 2024-2044

| | 2024* Enrollment | Over Capacity/ (Under Capacity) | 2029 Projected | Over Capacity/ (Under Capacity) | 2044 Enrollment | Over Capacity/ (Under Capacity) |
|--------------------------------|-----------------------------|--|---------------------------|--|----------------------------|--|
| Elementary (K-6) | 10,582 | 94 | 10,711 | 223 | 11,497 | 1,009 |
| Middle School (7-8) | 2,966 | -531 | 2,936 | -561 | 3,170 | -327 |
| High School (9-12) | 6,269 | 518 | 6,219 | 468 | 6,672 | 921 |
| Total | 19,817 | 81 | 19,866 | 130 | 21,339 | 1,603 |

* = March 2024

The District has schools that are 50 years old and need replacing, modernizing, or rebuilding within the long-range (2044) 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 capacity at all three grade levels in negative territory.

SECTION 6 – PLANNED IMPROVEMENTS

Starting in 2020 the District has tried to fund capital improvements. A 2020 Technology/Capital Levy passed. That Levy totaled \$96M; \$34.87M was capital-related. In 2021 another Capital Levy passed totaling \$180M (\$70M for Oak Heights, \$45M for Spruce Phase 2, and \$65M for Renewal and Upgrade projects).

In 2024 both Proposition 1, a \$594M Bond, and Proposition 2, 120M Technology/Capital Levy passed with 40M funding Capital Construction. The bond funds the transfer of Oak Heights from Levy-funded to Bond-funded, College Place, and Westgate Elementary Schools Replacements, College Place Middle School Replacement, the addition of a new middle school, and multi-site renewal & upgrade projects.

Construction Projects - (Six-Year Plan)

With the passage of 2024 Construction Bonds and Levies, the District will see construction throughout the District over the 2024 to 2029 period. The Bond will fund the 6th-grade move to middle school which requires adding significant capacity at the middle school grade levels. It also relieves overcrowding at the elementary grade levels. The 2023 Facilities Advisory Committee made recommendations to the Board of Directors based on prior Bond Committee work and updated demographer information. The District’s Board of Directors approved a variation on the Facility Advisory Committee’s recommendations to replace three elementary schools, and a middle school, add a new middle school, and upgrade or replace systems at multiple sites. Planning for a secondary alternative program is also in progress.

Table 13 – Construction Projects

| 2024 Bond Projects | Estimated Completion Date | Student Capacity Change | Estimated Project Cost |
|---|----------------------------------|--------------------------------|-------------------------------|
| New Middle School | 2028 | 1000 | \$150,000,000 |
| New College Place Middle | 2028 | 235 | \$140,000,000 |
| New Oak Heights Elementary ¹⁻³ | 2026 | 0 | \$85,000,000 |
| New College Place Elementary ¹⁻³ | 2028 | 10 | \$70,000,000 |
| New Westgate Elementary ¹⁻³ | 2029 | 30 | \$85,000,000 |
| Renewal & Upgrade Projects (Multi-Site) | 2024-2028 | 0 | \$35,000,000 |

1. New Oak Heights will have a capacity of 620 students. Other replacement elementary schools will have a capacity of 550 students.
2. Relocatable classrooms are excluded from the calculation of existing capacity.
3. Boundary Adjustment will affect capacity change. Precise numbers to be determined.

Table 14 – Capital Construction Finance Detail

| | Budget | Funds | State Construction Assistance* | Other Property Revenue |
|---|---------------|------------------------|---------------------------------------|-------------------------------|
| Completed Spruce Phase 2 | 45M | 2021 Levy | TBD | TBD |
| New Middle School | 150M | 2024 Bond | Not eligible | TBD |
| New College Place Middle | 140M | 2024 Bond | TBD | TBD |
| New College Place Elementary | 70M | 2024 Bond | TBD | TBD |
| New Oak Heights Elementary | 85M | 2024 Bond | TBD | TBD |
| New Westgate Elementary | 85M | 2024 Bond | TBD | TBD |
| Renewal & Upgrade Projects (Multi-Site) | 75M | 2024 Levy 2021 Levy | Not eligible | TBD |

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 2029 and to update existing classroom and building spaces to assist in achieving its total local educational program objectives. The District would adjust attendance boundaries to accommodate the 6th-grade move to middle school and balance enrollment across all the schools.

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

Forty-four relocatable classrooms are currently in use at school sites throughout the District, providing additional capacity for increased enrollment, 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 annually.

Site Acquisition and Improvements

The District currently owns enough school sites to accommodate projected student housing needs through the year 2044.

Future Lightrail Impacts and rezoning

The District has yet to see the impacts from the light rail station opening in Lynnwood at the center of the District and the Ashway Park and Ride at the north end of the District. The City of Lynnwood and Snohomish County have rezoned these areas for increased densification. With decreasing birthrates, we have not planned on student generation rates exceeding our capacity. However, this could quickly change.

SECTION 7 – CAPITAL FACILITIES FINANCING PLAN

Funding of school facilities is secured from several sources, with the major source being voter-approved bonds. Other sources may include State construction assistance funds, development mitigation fees, 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 the construction of new schools and other capital improvement projects. A 60% voter approval is required to pass a bond. Bonds are then retired through a collection of property taxes. Voters in the District passed a capital construction bond of \$594M in February 2024, and \$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 construction assistance funds are generated from a complex formula based on many factors. Presently, the State provides construction assistance funds for Edmonds School District projects at a rate of 38.59% of **eligible** costs, which is 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 the availability of State construction assistance funding has not kept pace with enrollment growth, increasing construction costs, or actual square footage constructed per student, these 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 construction assistance 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

As with the current 2022 CFP, the District will not seek development impact fees in its updated 2024 Plan. 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 can adopt their 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 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, and the recent State Clean Buildings Act enforcing energy efficiency and energy code compliance, 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.

Appendix A

Determination of Nonsignificance

DETERMINATION OF NONSIGNIFICANCE
Edmonds School District No. 15 Capital Facilities Plan 2024-2029

DESCRIPTION OF PROPOSAL:

1. Adoption of the Six-Year Capital Facilities Plan 2024-2029 by Edmonds School District No. 15. The updated Capital Facilities Plan is prepared in accordance with the State Growth Management Act and is a non-project document. It provides an inventory of District-owned facilities, current student enrollment, 6-year and 20-year projected student enrollment and analyzes the implications of the data on facility needs. Board adoption will occur on August 27, 2024.
2. Incorporation of the Edmonds School District's Capital Facilities Plan 2024-2029 by Snohomish County into the Snohomish County Comprehensive Plan pursuant to the requirements of Snohomish County Ordinance 97-095.
3. Potential adoption of the Edmonds School District Capital Facilities Plan by the Cities of Brier, Edmonds, Lynnwood, Mountlake Terrace and the Town of Woodway, to be incorporated into their Comprehensive Plans.

PROPONENT: Edmonds School District No. 15

LOCATION OF PROPOSAL: The Edmonds School District (District) is the largest District in the County and the twelfth largest of Washington's 295 public school systems. The District covers an area of approximately 36 square miles and includes the incorporated Cities of Brier, Edmonds, Lynnwood, 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 and Shoreline School District on the south, Puget Sound on the west, 148th Street SW and Mukilteo School District on the north, and Everett and Northshore School Districts on the east.

LEAD AGENCY: Edmonds School District No. 15

The lead agency for this non-project proposal 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 43.21 C.030(2)(c). This determination assumes compliance with State law and Snohomish County, Cities of Brier, Edmonds, Lynnwood, Mountlake Terrace and The Town of Woodway's 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 upon request.

It is the policy of the District that when undertaking an action involving the exercise of substantive SEPA authority, the District shall consider, as appropriate under the circumstances, the ramifications of such action as to one or more of the factors listed in Edmonds School District Policy 9630, 7.0 SEPA and Agency Decisions.

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: Lydia Sellie, Edmonds School District No. 15
Title: Executive Director of Business and Operations
Address: Edmonds School District No. 15
20420 68th Avenue West
Lynnwood, Washington 98036
Phone: (425) 431-7015

Issue Date: July 17, 2024

Signature: 

Date: 7-15-2024

There is no agency appeal process for this determination.

Appendix B

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, multi-family/studio or 1-bedroom, and multi-family/2-bedroom or more.

Plan Performance Criteria

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

Plan Review Procedures

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

The Snohomish County Comprehensive Plan is current through legislation passed December 16, 2020.

Disclaimer: The Clerk of the Council's Office retains the official version of the Snohomish County Comprehensive Plan. The web version is updated as new ordinances become effective. New ordinances do not necessarily become effective in chronological or numerical order. Users should contact the Clerk of the Council's Office for information on legislation not yet reflected in the web version.

Note: This site does not support Internet Explorer. To view this site, Code Publishing Company recommends using one of the following browsers: Google Chrome, Firefox, or Safari.

[County Website: snohomishcountywa.gov](http://snohomishcountywa.gov)

County Telephone: (425) 388-3494

[Code Publishing Company](#)

EVERETT SCHOOL DISTRICT No. 2

CAPITAL FACILITIES PLAN

2024-29



Adopted: June 25, 2024

EVERETT SCHOOL DISTRICT NO. 2
RESOLUTION NO. 1309
Adoption of Capital Facilities Plan 2024-29

A Resolution of the Board of Directors (the "Board") of the Everett School District No. 2 (the "District") to adopt the Capital Facilities Plan 2024-29 (the "Plan") for school facilities conforming to the 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, August 2018, August 2020 and August 2022 the Board approved Resolutions 700, 742, 799, 860, 907, 1004, 1046, 1095, 1132, 1138, 1180, 1240 and 1281 adopting updated Capital Facilities Plans therefore 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

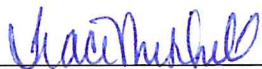
WHEREAS, the District conducted a review of the Plan in accordance with the State Environmental Policy Act, state regulations implementing the act, and District policies and procedures;

NOW, THEREFORE, BE IT RESOLVED:

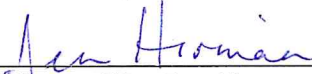
1. The Capital Facilities Plan 2024-29 is hereby adopted by the Board; and
2. The Snohomish County Council is hereby requested to adopt the Plan by reference as part of the capital facilities element of the County's General Policy Plan; and
3. The cities of Mill Creek and Everett are hereby requested 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 June 2024 and authenticated by the signatures affixed below.

BOARD OF DIRECTORS:



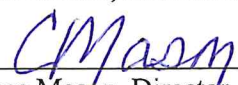
Traci Mitchell, President



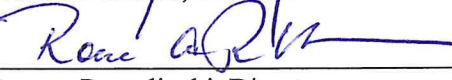
Jen Hirman, Vice President



Charles Adkins, Parliamentarian

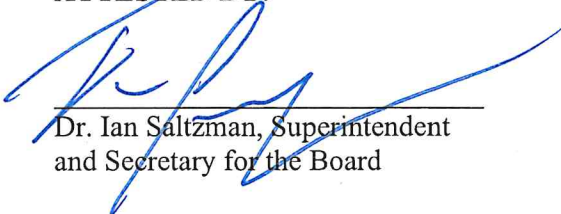


Caroline Mason, Director



Roman Rewolinski, Director

ATTESTED BY:



Dr. Ian Saltzman, Superintendent
and Secretary for the Board

EVERETT SCHOOL DISTRICT No. 2

CAPITAL FACILITIES PLAN

2024-29

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Section 1

Introduction

SECTION 1: INTRODUCTION

Purpose of the Capital Facilities Plan

The Washington Growth Management Act (GMA) outlines fifteen broad goals including adequate provision of necessary public facilities and services. Schools are among these necessary facilities and services. 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 with a description of facilities needed to accommodate projected student enrollment at acceptable levels of service through the year 2044, and a detailed schedule and financing program for capital improvements over the six years, 2024-2029.

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 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 that 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.

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. For this CFP, kindergarten through grade twelve students are considered 1.0 FTE. The FTE enrollment and Headcount (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. The total population within the district in 2023 is estimated at 152,913 (Snohomish County GMA Population Forecast).

The district serves 19,576 students (October 2023 – OSPI Report 1049) in eighteen elementary schools, five middle schools, three comprehensive high schools, one alternative high school, and 140 portable classrooms. The full and part-time district staff is approximately 2,550.

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) the need to construct new facilities to meet student enrollment growth; 2) the need to upgrade older facilities so they can continue to serve students in the decades ahead; 3) the availability of real property appropriately sized for anticipated future school facilities' needs.

Another future facility-related issue is the possible effects of Sound Transit's Light Rail expansion into Everett. Some of the proposed routes are located close or adjacent to several facilities including a high school, middle school and the Community Resource Center. Four locations are also being evaluated for a Sound Transit operations and maintenance facility serving the rail extension project, and one of those may involve acquisition of the Everett Public School's central bus facility property near Boeing. The possibility of losing the current central bus facility and the resulting impacts on operations is a major concern for the district. The district would need to find and acquire land centrally located within specific zoning and build a new transportation facility.

Memorial Stadium baseball field has been in use by the Everett AquaSox for forty years. In 2020, Major League Baseball (MLB) took over the minor league system and mandated that stadiums meet a long list of minimum standards. Currently, Memorial Stadium does not meet the requirements set by MLB. As a result, the Everett AquaSox and the City of Everett are evaluating the best course of action to meet the minimum MLB standards by considering options to either stay at their current venue or opting to build a brand new venue in downtown Everett. Both options come at considerable costs. The AquaSox, City and County are in discussions, as the

necessary upgrades or new facility costs range from \$40 to \$80 million dollars. If the AquaSox vacate their current location, the district will need to invest in downgrading the field amenities to align maintenance costs with student use.

Lastly, the Everett Public Schools faces a possible Urban Growth Area (UGA) expansion in the south-east portion of its district. Snohomish County has been reviewing and developing their 20-year comprehensive plan to accommodate population and employment growth. In the most recent 2024 Comprehensive Plan update, the county outlines three alternatives in regard to the UGA. These include (1) no action, (2) a medium growth alternative that would include minor UGA adjustments and (3) an alternative that would address higher growth. Both alternatives 2 and 3 would affect the district. Option 2 allows for a higher density in the current UGA and option 3 expands the UGA east between approximately 154th to 176th. For years, the district's growth in enrollment has been primarily in the south end. Increasing the density and/or expanding the UGA in this area will exacerbate the district's shortfall in permanent building capacity.

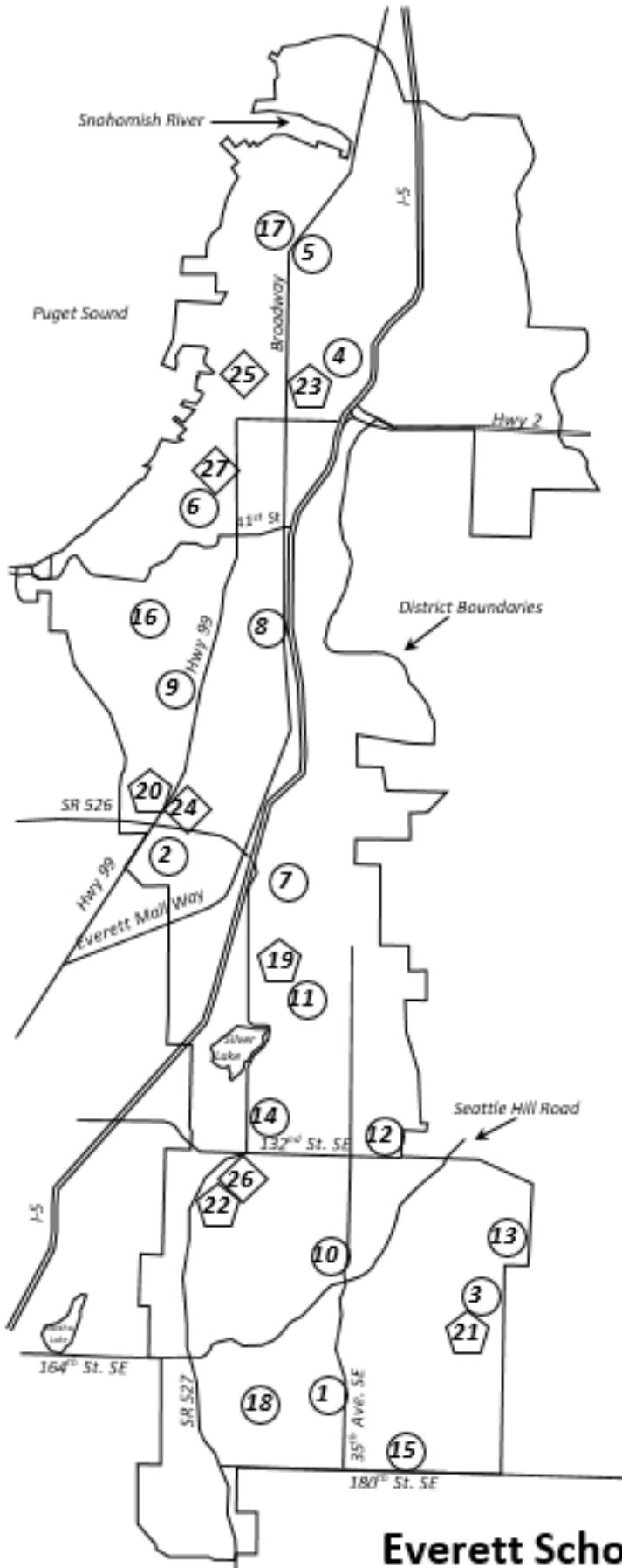


Figure 1
Map of School Facilities



Approximate Scale: 1 mile

School Facilities
Elementary Schools

1. Cedar Wood
2. Emerson
3. Forest View
4. Garfield
5. Hawthorne
6. Jackson
7. Jefferson
8. Lowell
9. Madison
10. Mill Creek
11. Monroe
12. Penny Creek
13. Silver Firs
14. Silver Lake
15. Tambark Creek
16. View Ridge
17. Whittier
18. Woodside

Middle Schools

19. Eisenhower MS
20. Evergreen MS
21. Gateway MS
22. Heatherwood MS
23. North MS

High Schools

24. Cascade HS
25. Everett HS
26. HM Jackson HS
27. Sequoia HS

1/24/2022

Everett School District No. 2

Section 2

Educational Program Standards

SECTION 2: EDUCATIONAL PROGRAM STANDARDS

Educational Program Standards – Districtwide

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, scheduling requirements, and use of relocatable classroom facilities (portables).

In addition, government initiatives and community expectations may affect how classroom space is used. The district has 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:

- Advanced Placement
- Athletics, Health, and Fitness
- Career and Technical Education (CTE)
 - Auto Shop
 - Business and Marketing
 - Communication and Information Technology
 - Education Careers
 - Energy and Sustainability
 - Engineering and Advanced Manufacturing
 - Health and Human Services
 - Health Science and Medical Careers
 - Horticulture, Agriculture, and Floriculture
- Contract Learning
- Counseling (career and mental health)
- Dual Language Spanish Immersion Program
- Early Childhood Educational Assistance Program (ECEAP)
- Elementary Music (designated classroom)
- Family Resource Centers
- Health Services
- High school credit classes offered at middle schools
- Highly Capable Programs
- Learning Assistance Programs
- Leadership and Activities
- Library Instruction
- Multilingual Learner (ML)
- Online High School
- Partnerships
 - Lighthouse Cooperative
 - Parent-Teacher-Student Association (PTSA)

- Port Gardner Parent Partnership
- Mental Health providers
- Natural Leaders
- Play and Learn (Early Learning Program)
- 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 transitional 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 & Labs - Video Production, Programing, Robotics, etc.
- Transitional Kindergarten
- Title I Programs – Math & Reading
- Wireless Computer Carts

These specialized or nontraditional educational programs can significantly impact 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 some 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 may reduce the building’s classroom capacities.

District educational program standards will change over time due to 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 following:

| <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 (Developmental) |
| 10 | Special Education - Kindergarten (Developmental) |
| 10 | Special Education - Achieve (behavior support) |
| 15 | Special Education - Extended Resource Room |
| 10 | Special Education - Life Skills |

- As a standard, students are provided Music, Physical Education and Library instruction. Some schools may have Art and or STEM/STEAM instruction if staffing and building space allow.
- At least one Special Education Resource Room is part of the curriculum.
- Design capacity for new schools is 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 the 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 following:

| <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 | Multilingual Learner (MLL) |

High School

- School capacity is determined using the following:

| <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 Multilingual Learner (ML)

Middle School and/or High School

- Students are also provided educational opportunities such as:
 - Art Labs
 - Career and Technical Education (CTE)
 - Auto Shop (Cascade High School only)
 - Marketing (high school only)
 - Navy Junior Reserve Officer Training Corps (high school only)
 - Technology Labs
 - Challenge and Advanced Placement Program
 - Dual Credit Programs – College in the High School
 - Drama rooms/Performing Arts (high school and some middle schools)
 - Health and Fitness
 - Music rooms – Band, Orchestra and Choir
 - Science / STEM Labs
 - Design capacity for new schools is 825 students for middle schools and 1,500 students for high school.

- 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

- **2023 Actual Class Size Average - based on the October 1, 2023 count of student enrollment**
 - 20.0 Kindergarten
 - 21.0 Grades 1-3 General Education
 - 25.9 Grades 4-5 General Education
 - 23.7 Grades 6-8 General Education
 - 24.7 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.

An example of changing school boundaries to reduce the need for additional classroom space began with the 2020-21 school year. The district instituted a limited re-configuration of high school boundaries in response to significant enrollment growth in the southern end of the district. The re-configuration was phased over four years through 2023.

In 2023, the district made a small boundary change to mitigate a capacity shortage due to a new multi-family housing development built on the corner of Evergreen Way and Hwy 526. The development named Four Corners has 430 affordable housing units that contain 1 to 5 bedrooms. The anticipated student generation from this one complex was too large to accommodate at the original designated elementary school.

Trends in Programs, with Potential Impacts on district facilities

- Aerospace and Advanced Manufacturing Pathway
- Medical and Health Pathway
- Information and 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 course offerings
- 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 the locations of district school facilities is provided in Figure 1 on page 1-3.

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 the gross square footage of a building by a standard square footage per student. OSPI uses the following in their calculations: 90 sq. ft. per kindergarten through grade six student, 117 sq. ft. per grade seven and grade eight student, 130 sq. ft. per grade nine through grade twelve student, and 144 sq. ft. per disabled student (WAC 392-343-035). 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 school and/or the 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, and to help prevent overbuilding. Portables are not a solution for housing students on a permanent basis. The typical useful life of a portable is 30 to 40 years. The ages of the district's portables range from 0 to 53 plus years. As the district is able, older portables will be replaced with newer units. The portables capacity inventory is summarized in Table 2.

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
- 36th Street & Norton Avenue
 - 2.96 acres
 - Long-term ground 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 | 2023 Permanent Student Capacity (2) | Teaching Stations Not Generating Capacity (3) |
|---------------------------|-------------------|-----------------------------|-------------------------------------|-------------------------------------|-------------------------------------|---|
| Elementary Schools | | | | | | |
| Cedar Wood | 14.40 | 55,454 | 20 | 2 | 437 | 4 |
| Emerson | 8.05 | 52,796 | 21 | 2 | 430 | 4 |
| Forest View | 15.30 | 66,629 | 23 | 1 | 495 | 4 |
| Garfield | 5.60 | 52,744 | 19 | 2 | 444 | 3 |
| Hawthorne | 8.84 | 72,395 | 23 | 4 | 458 | 6 |
| Jackson | 5.16 | 51,652 | 13 | 2 | 273 | 3 |
| Jefferson (4) | 18.81 | 55,154 | 19 | 3 | 443 | 2 |
| Lowell | 9.34 | 58,690 | 20 | 3 | 451 | 1 |
| Madison | 9.64 | 58,063 | 17 | 4 | 416 | 5 |
| Mill Creek | 9.69 | 55,646 | 22 | 2 | 505 | 2 |
| Monroe | 9.15 | 69,463 | 23 | 4 | 539 | 2 |
| Penny Creek | 13.90 | 64,882 | 30 | 1 | 649 | 1 |
| Silver Firs | 12.02 | 55,839 | 23 | 2 | 492 | 1 |
| Silver Lake | 11.09 | 56,774 | 19 | 2 | 420 | 4 |
| Tambark Creek | 18.64 | 83,665 | 28 | 1 | 591 | 3 |
| View Ridge | 9.47 | 66,154 | 25 | 2 | 562 | 2 |
| Whittier | 5.20 | 54,084 | 19 | 2 | 427 | 1 |
| Woodside | 10.84 | 55,587 | 22 | 1 | 468 | 3 |
| Totals: | 195.14 | 1,085,671 | 386 | 40 | 8,500 | 51 |
| Middle Schools | | | | | | |
| Eisenhower | 19.67 | 107,252 | 34 | 4 | 889 | |
| Evergreen | 21.74 | 116,526 | 39 | 7 | 1,041 | |
| Gateway | 43.70 | 110,181 | 38 | 3 | 955 | |
| Heatherwood | 29.21 | 117,051 | 33 | 4 | 862 | |
| North | 10.66 | 101,770 | 36 | 6 | 959 | 0 |
| Totals: | 124.98 | 552,780 | 180 | 24 | 4,706 | 0 |
| High Schools | | | | | | |
| Cascade | 38.85 | 244,345 | 71 | 9 | 1,867 | 0 |
| Everett | 11.12 | 280,459 | 76 | 10 | 1,997 | |
| Jackson | 42.79 | 247,043 | 73 | 7 | 1,856 | |
| Sequoia (5) | 3.02 | 67,007 | 15 | 1 | 375 | |
| Totals: | 95.78 | 838,854 | 235 | 27 | 6,095 | 0 |
| | 415.90 | 2,477,305 | | | | |

Updated: 4/21/2024

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, 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 | 2023 Portable Student Capacity (1) | Teaching Stations Not Generating Capacity (2) |
|---------------------------|-------------------------------------|-------------------------------------|------------------------------------|---|
| Elementary Schools | | | | |
| Cedar Wood | 11 | | 253 | 1 |
| Emerson | 8 | | 188 | 1 |
| Forest View | 5 | | 120 | |
| Garfield | 0 | | 0 | |
| Hawthorne | 0 | | 0 | 1 |
| Jackson | 3 | | 72 | 1 |
| Jefferson | 4 | | 96 | 1 |
| Lowell | 5 | | 109 | 3 |
| Madison | 0 | | 0 | |
| Mill Creek | 8 | | 176 | |
| Monroe | 1 | | 20 | 1 |
| Penny Creek | 7 | | 161 | |
| Silver Firs | 1 | | 24 | 1 |
| Silver Lake | 9 | | 192 | 1 |
| Tambark Creek | 5 | | 116 | |
| View Ridge | 5 | | 120 | |
| Whittier | 1 | | 24 | 2 |
| Woodside | 8 | | 192 | 1 |
| Totals: | 81 | 0 | 1,863 | 14 |
| Middle Schools | | | | |
| Eisenhower | 6 | | 132 | |
| Evergreen | 7 | | 168 | |
| Gateway | 3 | | 72 | |
| Heatherwood | 11 | | 288 | 1 |
| North | 0 | | 0 | |
| Totals: | 27 | 0 | 660 | 1 |
| High Schools | | | | |
| Cascade | 2 | | 36 | |
| Everett | 0 | | 0 | |
| Jackson | 14 | 1 | 351 | |
| Sequoia | 0 | | 0 | |
| Totals: | 16 | 1 | 387 | 0 |

Updated: 4/22/2024

Notes:

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

**Table 3
Support Facility Inventory**

| Support Facility | Site Size (acres) | Building Area (Sq. Ft.) |
|--|----------------------|----------------------------|
| Maintenance Facility | 1.5 | 29,080 |
| Vehicle Repair Building | - | 7,851 |
| Maintenance Storage Building | 0.4 | 10,594 |
| North Satellite Bus & Storage Facility | 2.42 | 12,600 |
| Central Bus Facility | 5.25 | 24,102 |
| Community Resource Center ⁽¹⁾ | 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 |
| Totals: | 57.75 | 218,434 |

Updated: 4/2/2024

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 1970s through the early 1980s, student enrollment in the district was relatively constant. Beginning in 1983 student enrollment showed a 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 the district's enrollment declined due to the effects of the economic recession and continued to go down through 2012. In the years between 2012 and 2019 the district's enrollment increased until the Pandemic. Due to COVID-19, district enrollment decreased in 2020, with little growth over the last three years. Now, districtwide enrollment is projected to increase through 2033. Enrollment projections from 2034 to 2044 are linked directly to OFM population forecasts and show a steady increase as well.

2024-2029 Enrollment Projections

This CFP has been prepared using enrollment projections, for 2024 through 2029, 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 (medium) 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. A historical cohort-survival projection was prepared by OSPI (detailed projections in Appendix C) and an OFM Ratio projection was 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 (medium-range), overall district enrollment will increase by 992 students over the next six years, reflecting an increase of approximately 5.07% over the 2023 enrollment levels. Table 6 provides a breakdown of the Kendrick enrollment projections by grade level span for every year from 2024 to 2029.

2044 Enrollment Projections

Long-range enrollment projections are much more speculative than short-range projections. They are still useful in developing comprehensive plans for future facilities and sites. Kendrick

produces projections through 2031 and OSPI produces projections through 2027. Therefore, enrollment projections for 2044 are presented in Table 7 using just the OFM Ratio Method.

The OFM projections for 2044 indicate that total enrollment in the district will increase by 3,958 students to 23,578, an increase of 20.17% over the 2021 enrollment levels. Enrollment in 2044 is projected to be higher at all levels. An analysis of future capacities and facility needs is provided in Section 5.

Table 4
Enrollment 2014-23 & Projections 2024-29

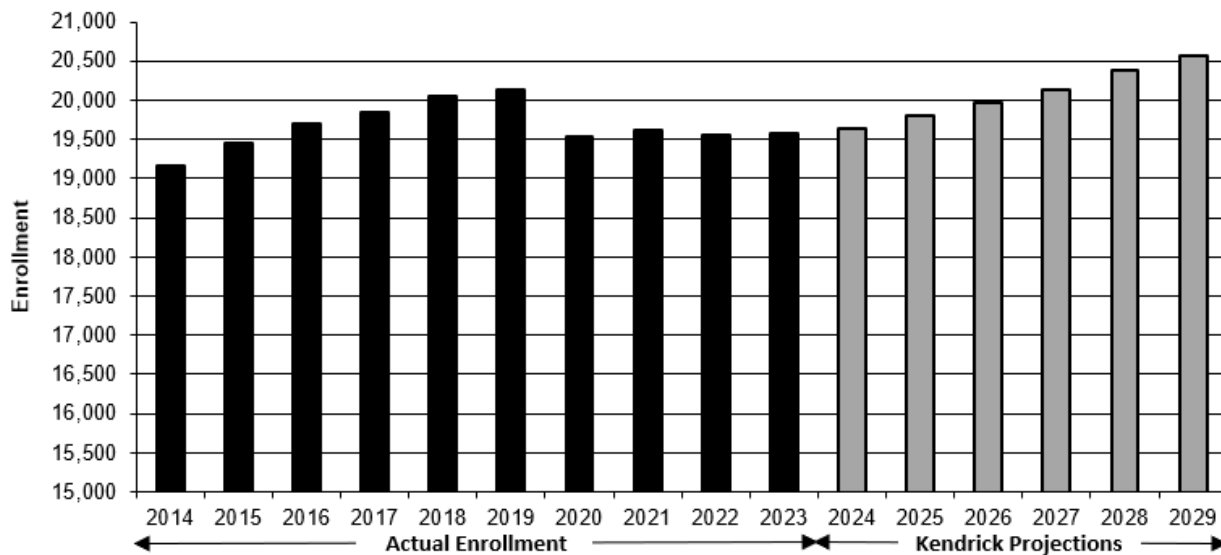


Table 5
Comparison of Enrollment Projections 2024-29

| | <i>Actual*</i> | 2024 | 2025 | 2026 | 2027 | 2028 | 2029 | Projected Total Change 2023-29 | Projected Percent Change 2023-29 |
|----------|----------------|--------|--------|--------|--------|--------|--------|--------------------------------|----------------------------------|
| Kendrick | 19,576 | 19,645 | 19,802 | 19,965 | 20,143 | 20,380 | 20,568 | 992 | 5.07% |
| OFM | 19,576 | 19,645 | 19,803 | 19,965 | 20,143 | 20,350 | 20,522 | 946 | 4.83% |
| OSPI | 19,576 | 19,437 | 19,296 | 19,065 | 18,852 | 18,703 | 18,497 | (1,079) | -5.51% |

* Actual enrollment from OSPI Form 1049

Table 6
OSPI Actual 2021 Enrollment &
Kendrick Medium-Range Projections 2024-29

| | <i>Actual*</i> | | | | | | | Projected Total Change 2023-29 | Projected Percent Change 2023-29 |
|------------|----------------|--------|--------|--------|--------|--------|--------|---|---|
| | 2023 | 2024 | 2025 | 2026 | 2027 | 2028 | 2029 | | |
| Elementary | 9,543 | 9,545 | 9,522 | 9,603 | 9,607 | 9,646 | 9,699 | 156 | 1.63% |
| Middle | 4,512 | 4,666 | 4,781 | 4,802 | 4,850 | 4,900 | 4,937 | 425 | 9.42% |
| High | 5,521 | 5,434 | 5,499 | 5,560 | 5,686 | 5,834 | 5,932 | 411 | 7.44% |
| Total: | 19,576 | 19,645 | 19,802 | 19,965 | 20,143 | 20,380 | 20,568 | 992 | 5.07% |

** Actual enrollment from OSPI Form 1049*

Table 7
OFM Enrollment Projections 2044

| | 2044 |
|-------------------|---------------|
| Elementary School | 11,350 |
| Middle School | 5,627 |
| High School | 6,601 |
| Total: | 23,578 |

**Table 8
Permanent Facility Capacity Calculations 2023-2029 & 2044**

| Elementary School | 2023 | 2024 | 2025 | 2026 | 2027 | 2028 | 2029 | 2044 |
|--|--------------|-------------|-------------|-------------|-------------|-------------|-------------|-------------|
| Enrollment | 9,543 | 9,545 | 9,522 | 9,603 | 9,607 | 9,646 | 9,699 | 11,350 |
| Capacity Change Due to Construction Projects | | 0 | 0 | 132 | 0 | 0 | 176 | 2,542 |
| Total Permanent Capacity (after construction projects) | 8,500 | 8,500 | 8,500 | 8,632 | 8,632 | 8,632 | 8,808 | 11,350 |
| Permanent Capacity surplus/(short) | (1,043) | (1,045) | (1,022) | (971) | (975) | (1,014) | (891) | 0 |
| Growth Related Capacity by Year increased/(reduced) | | (2) | 21 | 72 | 68 | 29 | 152 | |
| <i>Growth Related Capacity Need Over 6 yrs 156 / 1,199 = 13.01%</i> | | | | | | | | |



| Middle School | 2023 | 2024 | 2025 | 2026 | 2027 | 2028 | 2029 | 2044 |
|---|--------------|-------------|-------------|-------------|-------------|-------------|-------------|-------------|
| Enrollment | 4,512 | 4,666 | 4,781 | 4,802 | 4,850 | 4,900 | 4,937 | 5,627 |
| Capacity Change Due to Construction Projects | | 0 | 0 | 0 | 0 | 0 | 0 | 921 |
| Total Permanent Capacity (after construction projects) | 4,706 | 4,706 | 4,706 | 4,706 | 4,706 | 4,706 | 4,706 | 5,627 |
| Permanent Capacity surplus/(short) | 194 | 40 | (75) | (96) | (144) | (194) | (231) | 0 |
| Growth Related Capacity by Year increased/(reduced) | | (154) | (269) | (290) | (338) | (388) | (425) | |
| <i>Growth Related Capacity Need Over 6 yrs 425 / 231 = 183.98%</i> | | | | | | | | |

| High School | 2023 | 2024 | 2025 | 2026 | 2027 | 2028 | 2029 | 2044 |
|--|--------------|-------------|-------------|-------------|-------------|-------------|-------------|-------------|
| Enrollment | 5,521 | 5,434 | 5,499 | 5,560 | 5,686 | 5,834 | 5,932 | 6,601 |
| Capacity Change Due to Construction Projects | | 0 | 0 | 0 | 0 | 0 | 0 | 506 |
| Total Permanent Capacity (after construction projects) | 6,095 | 6,095 | 6,095 | 6,095 | 6,095 | 6,095 | 6,095 | 6,601 |
| Permanent Capacity surplus/(short) | 574 | 661 | 596 | 535 | 409 | 261 | 163 | 0 |
| Growth Related Capacity by Year increased/(reduced) | | 87 | 22 | (39) | (165) | (313) | (411) | |
| <i>Growth Related Capacity Need Over 6 yrs 985 / -163 = 0.00%</i> | | | | | | | | |

Section 5

Capital Facilities Plan

SECTION 5: CAPITAL FACILITIES PLAN

Facilities Needs 2024-29

Elementary School

There are currently existing permanent capacity deficiencies at the elementary school level. As of 2023, the district elementary enrollment was 1,043 students over the permanent building capacity. These students are housed in 95 portable classrooms. Thirteen of the district's eighteen elementary schools are currently over their permanent building capacity. By 2029, the district is projected to grow by an additional 156 elementary students. The plan to address these needs is through the construction of 10 additional classrooms and to purchase and/or relocate portables as needed. The 10 permanently constructed classrooms will increase capacity by 220.

Middle School

There are existing permanent capacity deficiencies at the middle school level. As of 2023, the district middle school enrollment was under the overall permanent building capacity. However, two of the five middle schools are considerably over capacity. These students are housed in 15 portable classrooms. Middle school enrollment is projected to continue to grow through 2029, with a growth of 425 students. The plan is to address the needs at individual schools through the purchase and placement and/or relocation of portables. The plan, as detailed in the CFP, does not include the construction of any new classroom space.

High School

District-wide, the high schools do not have an existing permanent capacity deficiency. Nonetheless, H.M. Jackson High School, the district's most southern high school, continues to be over its permanent building capacity. This is largely due to the continuous growth of new housing in the southern region of the district. The district implemented a three-year phased boundary adjustment from 2020 to 2023 in order help equalize enrollment to capacity ratios at the high school level. The outcome alleviated some of the stress in the south end, however the adjustment did not completely resolve the capacity shortage in the south end high school. By 2029, the district's overall high school enrollment is projected to grow by an additional 411 students in total. The plan to address part of these needs is through the purchase and placement and/or relocation of portables at the affected schools.

District-wide

Enrollment

The district-wide enrollment is projected to gradually increase each year from 2024 through 2029. During this same period, the anticipated enrollment levels will continue to exceed the 2023 capacities at the elementary and middle school levels. This increase in enrollment will be seen in all regions of the district. Enrollment and capacity projections are presented together for comparison purposes in Table 8 – *Permanent Facility Capacity Calculations 2024-2029 & 2044*.

Land

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

State law, Vision 2050, and the Snohomish County Code each address school facilities planning. To help plan for anticipated growth in student enrollment, especially in the southern part of the district, the district has been searching for developable assemblages of property large enough to site another elementary school. However, the availability of undeveloped land within this part of Snohomish County's Urban Growth Area (UGA) is extremely limited.

It would be more efficient from a student accessibility and transportation perspective to look at sites closer to the anticipated growth and outside the UGA rather than further away and within the UGA. It would be burdensome and inequitable to displace residents and diminish 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.

The district anticipates the need to continue to look outside of the UGA to locate parcels large enough to accommodate a school, where appropriate. The district is allowed to locate elementary schools 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 the extension of public facilities and utilities to serve schools sited in rural areas. RCW 36.70A.213(1)(b) & (c). With Snohomish County's 2024 Comprehensive Plan, there is a possibility that the UGA will expand within the District if the County's 3rd UGA alternative is adopted. It would push the current UGA boundary east from to 47th (between 154th down to 176th).

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 is not an appropriate solution of addressing the on-going 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 2029. Timelines for these projects can be found in Table 9 – *Capital Facilities Plan*.

Elementary Schools

District-wide elementary school enrollment is projected to reach 9,699 in 2029 as shown in Table 8, an increase of students from 2023 enrollment of 9,551. This equates to an overage of 1,199 students for the current combined elementary school capacity of 8,500. In response to the increase, the district is planning:

- 1) Additional classroom space as part of two new in lieu of modernization projects – 14 classrooms with a projected capacity of 308 will be constructed. The location of these additional classrooms: Jackson Elementary School – 6 classrooms (\$7,300,000); Madison ES – 4 classrooms (\$6,300,000); 4 classrooms added to another elementary school to be determined (\$6,600,000).
Total estimate - \$20,200,000
- 2) At least 5 portable classrooms for the elementary level will need to be purchased by 2029 and others relocated to provide enough classroom space.
Total estimate - \$5,475,000

The estimated cost of elementary school facility improvements that adds capacity is: \$25,675,000.

Middle Schools

District-wide middle school enrollment is projected to increase to 4,937 in 2029. The existing 2023 middle school capacity of 4,706 will not be adequate to accommodate the projected enrollment. To provide for the enrollment increases at individual schools, at least 3 portable classrooms will need to be purchased and others relocated to provide sufficient space. There are not any permanent facility construction plans through 2029. Total estimate - \$1,825,000.

The estimated cost of middle school facility improvements that add capacity is: \$1,825,000.

High Schools

District-wide high school enrollment is projected to increase to 5,932 by 2029. At that point, the southern high school is still projected to be over permanent building capacity, however the overage should be less than in prior years. It's anticipated that the District will also see increased enrollment in the North end of the district with more multi-housing developments in the pipeline. The district will add capacity by:

- 1) Purchase at least 1 portable and relocate portables as needed between 2024 and 2029.
Total estimate - \$700,000.
- 2) Add additional capacity via the Everett High School classroom and cafeteria modernization. This will add an additional 3 classrooms with a capacity of approximately 90. The additional classroom portion of cost is estimated at \$3,393,000.

The estimated cost of high school facility improvements that will add capacity is: \$4,093,000.

Future School Site Properties

180th Street SE

In 2008 the district purchased property on 180th St. SE as a future site for two schools. The construction of the first school, Tambark Creek Elementary School, was completed in 2020. The remainder of the site remains undeveloped and is the planned location of a future high school. 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/mitigation fees. The developer can use the certificates in lieu of paying impact/mitigation fees until the current credit balance of \$79,750 is exhausted or until August 15, 2028; whichever comes first.

Seattle Hill Road & SR 527

In 1997 & 1998 the district purchased an assemblage of properties for a future school site at the southeast corner of Seattle Hill Rd and Bothell-Everett Highway. Over the years the district demolished and removed all structures from the site. There is an established wetland on the property. The site remains undeveloped and is the planned location of a future middle school.

Property Purchases

To accommodate future growth and the facilities needs of the district, the district plans to continue to acquire approximately 11 acres of additional property in the southeastern portion of the district in the vicinity of Strumme Road for a future elementary school. The district currently owns 2 properties in this area. 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: \$3,600,000.

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 2029. Timelines for these projects can be found in Table 9 – *Capital Facilities Plan*.

School Improvements

- Cascade High School - Science Building - new in lieu of modernization
- Cascade High School - Cafeteria and kitchen upgrades
- Cascade High School - Bleacher and gym floor replacement
- Everett High School - Cafeteria & classroom modernization
- HM Jackson High School - STEM classroom upgrades
- HM Jackson High School - Bleacher replacement

The cost of these improvements is estimated at: \$68,313,000.

Safety and Security Projects

- Upgrades to building access control systems, fire alarm systems, secure locksets, keying systems, and intrusion detection.

The cost of these improvements is estimated at: \$6,398,000.

Clean Buildings Act

- Upgrades to buildings to meet the requirements of the Clean Building Act – HVAC, roofing, improved building envelope systems and controls:
 - HM Jackson High School - HVAC
 - HM Jackson High School - Roof
 - Gateway Middle School - HVAC
 - Sequoia High School - HVAC

- Heatherwood Middle School - HVAC
- Evergreen Middle School - HVAC
- Eisenhower Middle School - HVAC Controls
- Cascade High School - HVAC
- Cascade High School - Roof

The cost of these improvements is estimated at: \$37,428,000.

Technology Infrastructure & Upgrades (included in 2022 Levy)

- WIFI-mobile devices, multi-media classroom display systems, security cameras, network/data security, cybersecurity systems, data center systems, WIFI controller equipment for capacity, performance, and security
- Replace student Chromebooks and laptops.
- Upgrade electrical systems district-wide - Including data server rooms emergency backup generators and fiber optic network systems.
- Student Information System - including software and staff development.

The cost of these improvements is estimated at: \$79,000,000.

Other Projects

- Exterior and interior finishes such as paint and flooring, site work, freezer and cooler replacement , and other miscellaneous upgrades
- Replace playground equipment
- Replace reader boards
- South satellite bus facility

The cost of these improvements is estimated at: \$6,200,000.

Facilities Needs 2029-2044

Planned Improvements

To house the district-wide projected enrollment from 2029 through 2044, the district would need to construct new schools and/or classroom additions at various school sites throughout the district. To prepare for this projected growth, the district will need to acquire additional sites for new schools.

To accommodate the enrollment growth from 2029 to 2044 the district anticipates the need for the following facilities:

- Elementary school level
 - 120 Classrooms / 2,630 capacity (equivalent to four (4) new schools and additions to existing schools)
- Middle school level
 - 38 Classrooms / 821 capacity (equivalent to one (1) new school and additions to existing school(s))
- High school level
 - 21 Classrooms / 507 capacity (equivalent additions to existing school(s) or one (1) new small high school)

**Table 9
Capital Facilities Plan**

| | Estimated Project Cost by Year - in \$ Millions | | | | | Potential Funding Source | | | | | | |
|--|---|----------|----------|----------|----------|--------------------------|------------|---------------------------------|----------------------------------|------|---------------|--|
| | 2024 | 2025 | 2026 | 2027 | 2028 | 2029 | Total Cost | Secured 2022 Capital Levy Funds | Secured Mitigation & Impact Fees | SCAP | Future Funds* | |
| Improvements Adding Student Capacity | | | | | | | | | | | | |
| Elementary School | | | | | | | | | | | | |
| Jackson ES - Part of new in lieu of modernization project - 6 Classrooms | \$0.100 | \$0.500 | \$4.600 | \$2.100 | | | \$7.300 | X | | | | |
| Madison ES - Part of new in lieu of modernization project - 4 Classrooms | | | \$0.400 | \$4.300 | \$1.600 | | \$6.300 | X | | X | | |
| Elementary - 4 Classrooms - location TBD | | | \$0.695 | \$0.695 | \$2.300 | | \$6.600 | X | | X | | |
| Portable Relocations /Purchase | \$2.000 | \$0.695 | \$0.695 | \$0.695 | \$0.695 | | \$5.475 | | X | | X | |
| Middle School | | | | | | | | | | | | |
| Portable Relocations /Purchase | \$0.000 | \$0.175 | \$0.650 | \$0.650 | \$0.175 | | \$1.825 | | X | | X | |
| High School | | | | | | | | | | | | |
| Auditorium Bldg Modernization - 3 classrooms | | | \$0.175 | \$0.175 | \$3.393 | | \$3.393 | X | | X | | |
| Portable Relocations /Purchase | \$2.100 | \$1.370 | \$6.120 | \$4.020 | \$13.038 | | \$31.593 | | X | | | |
| Property Adding Student Capacity | | | | | | | | | | | | |
| Purchase property for future elementary school | \$0.000 | \$3.600 | | | | | \$3.600 | X | | X | X | |
| Improvements Not Adding Student Capacity | | | | | | | | | | | | |
| Local Projects - Sitework, Finishes, Mechanical, Electrical | | | | | | | | | | | | |
| Freezer & Cooler replacement - 2 schools | \$1.775 | \$1.900 | \$1.125 | \$1.150 | \$1.050 | | \$8.100 | X | | | | |
| Jackson ES - New in lieu of modernization project | \$0.175 | \$20.743 | \$18.500 | \$7.200 | | | \$46.618 | X | | | | |
| Madison ES - New in lieu of modernization project | | \$0.400 | \$33.500 | \$28.000 | \$4.450 | | \$66.350 | X | | X | | |
| Cascade HS - Science building new in lieu of modernization | | \$0.200 | \$0.800 | \$15.500 | \$9.700 | | \$26.200 | X | | X | | |
| Everett HS - Cafeteria & classroom modernization | | \$0.900 | \$13.800 | \$18.500 | \$0.100 | | \$33.300 | X | | X | | |
| HM Jackson HS - STEM classroom upgrades | \$0.310 | \$0.300 | | | | | \$0.610 | X | | | | |
| Cascade HS - Cafeteria & kitchen upgrade | | | \$0.585 | \$1.801 | \$0.820 | | \$6.398 | X | | X | | |
| Safety and security upgrades | \$0.925 | \$1.767 | | | | | \$1.100 | X | | | | |
| Bleacher Replacement - 2 schools - HM Jackson HS & Cascade HS | \$1.100 | | | | | | \$2.250 | X | | | | |
| Replace playground equipment - 6 schools | \$0.530 | \$0.450 | \$0.450 | \$0.450 | \$0.450 | | \$0.530 | | | X | | |
| Cascade HS - Main Gym Floor Replacement | | \$0.360 | \$0.360 | \$0.360 | \$0.360 | | \$1.800 | X | | | X | |
| Readerboards - 12 Schools | | | | | \$0.900 | | \$1.800 | | | | | |
| South satellite bus facility | | | | \$7.600 | \$5.600 | | \$37.428 | X | | | | |
| Clean Building Act - Upgrade HVAC/Roofing/Floor systems | \$2.755 | \$6.873 | \$8.300 | \$13.200 | \$13.200 | | \$79.000 | X | | | | |
| District-wide technology infrastructure & upgrades | \$13.100 | \$13.100 | \$13.200 | \$13.200 | \$13.200 | | \$319.293 | X | | | | |
| Subtotal | | | | | | | | | | | | |
| | \$22.770 | \$50.848 | \$50.734 | \$83.881 | \$98.118 | | \$354.486 | | | | | |
| Total | | | | | | | | | | | | |

Source: Everett School District
 *Funding from future bonds, levies, mitigation fees and impact fees.
 Updated: 5/07/2024

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 2024 through 2029. 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 and grants. 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 the 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 the 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, \$198.9 million in 2006, and \$149.7 million in 2016. Historically, most major projects have been financed by these bonds.

Capital Levies

In February 2022, the voters of the district approved a \$325.5 million replacement Capital Levy. In April 2016, the voters of the district approved an \$89.6 million replacement Capital Levy for Safety, Building, and Instructional Technology Improvements. In 2010, voters approved a Building Repair and Technology levy authorizing the district to collect \$48 million from property taxes over six years 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 and then retired from revenues accruing predominantly from the sale of renewable resources (i.e. - timber) from state school lands set aside by the Enabling Act of 1889. If these sources are insufficient to meet needs, the Legislature can appropriate funds or the State Board of Education can establish a moratorium on certain projects.

School districts may qualify for state 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 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 the 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 that 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 2024 state funding assistance percentages, for

recognized project costs in Snohomish County, range from a minimum of 20.00% to a maximum of 68.20%. The district's current state funding assistance percentage is: 52.56%.

State funding assistance can only be applied for and received for major school construction projects. Site acquisition and minor improvements are not eligible to receive funding assistance from the state. Because the 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 that are 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 district is over the allowance of square footage per student for state assistance and, therefore, not currently eligible for state funding assistance on projects that provide increased student capacity. The district remains eligible for state funding assistance for modernization and new in lieu of 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, 2024, the CCA has been adjusted to \$375.00 per square foot.

School Impact Fees

Impact fees, assessed on new housing developments, 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 of 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 | 0.407 | 0.154 | 0.102 | 0.664 |
| Multiple Family, 2+ BR | 0.139 | 0.053 | 0.052 | 0.243 |

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 | \$25,112 |
| Multiple Family, 0-1 BR | \$0 |
| Multiple Family, 2+ BR | \$8,514 |
| Duplexes and Townhouses | \$8,514 |

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

| Housing Type | Impact Fee Per Unit |
|-------------------------|----------------------------|
| Single Family | \$12,556 |
| Multiple Family, 0-1 BR | \$0 |
| Multiple Family, 2+ BR | \$4,257 |
| Duplexes and Townhouses | \$4,257 |

Table 12
Impact Fee Variables
Everett School District

| Criteria | Elementary | Middle | High |
|--|--|---|---------|
| Site Acquisition Cost Element | | | |
| Site Size (acres) | n/a | n/a | n/a |
| Average Land Cost Per Acre | n/a | n/a | n/a |
| Total Land Cost | n/a | n/a | n/a |
| Additional Land Capacity | n/a | n/a | n/a |
| Student Factor | | | |
| Single Family | 0.407 | 0.154 | 0.102 |
| Multiple Family 0-1 Bedroom | 0.000 | .000 | 0.000 |
| Multiple Family 2+ Bedrooms | 0.139 | 0.053 | 0.052 |
| School Construction Cost Element | | | |
| | Additional Classrooms | n/a | n/a |
| Additional Building Capacity | 308 | 0 | 0 |
| Current Facility Square Footage | 1,085,671 | 552,780 | 838,854 |
| Estimated Facility Construction Cost | \$20,200,000 | \$0 | \$0 |
| Relocatable Facilities (portables) Cost Element | | | |
| | Additional & Relocation of Portables | Additional & Relocation of Portables | n/a |
| Additional Building Capacity | 330 | 96 | 0 |
| Current Facility Square Footage | 85,120 | 25,088 | 15,232 |
| Estimated Facility Purchase & Relocate Cost | \$5,475,000 | \$1,825,000 | \$0 |
| State Financing Assistance Credit* | | | |
| School Space per Student (OSPI) | 90 | 117 | 130 |
| Construction Cost Allotment -- July 2024 | | \$375.00 | |
| State Financing Assistance Percentage | | 52.56% | |
| Tax Payment Credit | | | |
| Interest Rate | | 3.48% | |
| Loan Payoff (Years) | | 10 | |
| Levy Rate | | 0.000132 | |
| Average Assessed Value | \$697,666 (Single Family), \$212,571 (MF 0-1 BR), \$294,163 (MF 2+ BR) | | |
| Growth-Related Capacity Need | | | |
| Permanent Facilities | 13.01% | 183.98% | 0.00% |
| Discount | 50% | 50% | 50% |

* The district is currently not eligible for state funding assistance on construction that adds capacity.

Appendix A

Impact Fee Calculations

IMPACT FEE WORKSHEET
 EVERETT SCHOOL DISTRICT
SINGLE-FAMILY RESIDENTIAL

SITE ACQUISITION COST

| | | | | | | | | | | | | |
|------------------------------------|---|------|---|-----|---|---|---|----------------|-------|---|-----|-----------------|
| acres needed | x | 0.00 | / | \$0 | / | 0 | x | student factor | 0.407 | = | \$0 | (elementary) |
| acres needed | x | 0.00 | / | \$0 | / | 0 | x | student factor | 0.154 | = | \$0 | (middle school) |
| acres needed | x | 0.00 | / | \$0 | / | 0 | x | student factor | 0.102 | = | \$0 | (high school) |
| TOTAL SITE ACQUISITION COST | | | | | | | | | | | = | \$0 |

SCHOOL CONSTRUCTION COST

| | | | | | | | | | | | | |
|-------------------|---|--------------|---|-----|---|----------------|-------|---|----------|-----------------|---|----------|
| total const. cost | / | \$20,200,000 | / | 308 | x | student factor | 0.407 | = | \$26,683 | (elementary) | | |
| total const. cost | / | \$0 | / | 0 | x | student factor | 0.154 | = | \$0 | (middle school) | | |
| total const. cost | / | \$0 | / | 0 | x | student factor | 0.102 | = | \$0 | (high school) | | |
| Subtotal | | | | | | | | | | | = | \$26,683 |

| | | | | | |
|---|-----------|--|-----------|---|----------|
| Total Square Feet of Permanent Space (District) | 2,477,305 | / Total Square Feet of School Facilities | 2,601,905 | = | 95.21% |
| TOTAL FACILITY CONSTRUCTION COST | | | | = | \$25,415 |

RELOCATABLE FACILITIES (PORTABLE MOVES AND PURCHASES)

| | | | | | | | | | | | | |
|-----------------|---|-------------|---|-----|---|----------------|-------|---|---------|-----------------|---|---------|
| total cost | / | \$5,475,000 | / | 330 | x | student factor | 0.407 | = | \$6,753 | (elementary) | | |
| total cost | / | \$1,825,000 | / | 96 | x | student factor | 0.154 | = | \$2,928 | (middle school) | | |
| total cost | / | \$0 | / | 0 | x | student factor | 0.102 | = | \$0 | (high school) | | |
| Subtotal | | | | | | | | | | | = | \$9,681 |

| | | | | | |
|--|---------|--|-----------|---|-------|
| Total Square Feet of Portable Space (District) | 124,600 | / Total Square Feet of School Facilities | 2,601,905 | = | 4.79% |
| TOTAL FACILITY CONSTRUCTION COST | | | | = | \$464 |

STATE FINANCING ASSISTANCE CREDIT

| | | | | | | | | | | | | | | |
|---------------------------------|---|----------|---|----------------|-----|---|------------------------------|-------|---|----------------|-------|-----|-----|-----------------|
| Const. Cost Allocation | x | \$375.00 | x | OSPI Allowance | 90 | x | State Financing Assistance % | 0.00% | x | student factor | 0.407 | = | \$0 | (elementary) |
| Const. Cost Allocation | x | \$375.00 | x | OSPI Allowance | 117 | x | State Financing Assistance % | 0.00% | x | student factor | 0.154 | = | \$0 | (middle school) |
| Const. Cost Allocation | x | \$375.00 | x | OSPI Allowance | 130 | x | State Financing Assistance % | 0.00% | x | student factor | 0.102 | = | \$0 | (high school) |
| TOTAL STATE MATCH CREDIT | | | | | | | | | | | = | \$0 | | |

TAX PAYMENT CREDIT

| | | | | | | | | | | | |
|---------------------|-----------|---|----|-----------------------|-----|----------|------------------------|-------|---|-------|----------------------|
| (1 + interest rate) | 3.48% | ^ | 10 | years to pay off bond | - 1 | / | [interest rate | 3.48% | x | | |
| assessed value | \$697,666 | ^ | 10 | years to pay off bond | x | 0.000132 | Property tax levy rate | x | = | \$767 | (tax payment credit) |

IMPACT FEE CALCULATION

| | |
|--|-----------------|
| SITE ACQUISITION COST | \$0 |
| FACILITY CONSTRUCTION COST | \$25,415 |
| RELOCATABLE FACILITIES COST (PORTABLES) | \$464 |
| (LESS STATE FINANCING ASSISTANCE CREDIT) | \$0 |
| (LESS TAX PAYMENT CREDIT) | (\$767) |
| (LESS COUNTY DISCOUNT) | (\$12,556) |
| (LESS ELECTIVE DISTRICT DISCOUNT) | \$0 |
| FINAL IMPACT FEE PER UNIT | \$12,556 |

IMPACT FEE WORKSHEET
 EVERETT SCHOOL DISTRICT
MULTIPLE FAMILY RESIDENTIAL -- 2 BEDROOM OR MORE

| | | | | | | | | | | | | | |
|--|--------------|--|----------------|----------------------------|---|------------------------------|-----------|---|----------------|------------------------|---|---------|----------------------|
| SITE ACQUISITION COST | | | | | | | | | | | | | |
| acres needed | 0.00 | x | cost per acre | \$0 | / | capacity (# students) | 0 | x | student factor | 0.139 | = | \$0 | (elementary) |
| acres needed | 0.00 | x | cost per acre | \$0 | / | capacity (# students) | 0 | x | student factor | 0.053 | = | \$0 | (middle school) |
| acres needed | 0.00 | x | cost per acre | \$0 | / | capacity (# students) | 0 | x | student factor | 0.052 | = | \$0 | (high school) |
| TOTAL SITE ACQUISITION COST | | | | | | | | | | | = | \$0 | |
| SCHOOL CONSTRUCTION COST | | | | | | | | | | | | | |
| total const. cost | \$20,200,000 | / | / | | | capacity (# students) | 308 | x | student factor | 0.139 | = | \$9,116 | (elementary) |
| total const. cost | \$0 | / | / | | | capacity (# students) | 0 | x | student factor | 0.053 | = | \$0 | (middle school) |
| total const. cost | \$0 | / | / | | | capacity (# students) | 0 | x | student factor | 0.052 | = | \$0 | (high school) |
| TOTAL FACILITY CONSTRUCTION COST | | | | | | | | | | | = | \$9,116 | |
| Total Square Feet of Permanent Space (District) | 2,477,305 | / Total Square Feet of School Facilities | | | | | 2,601,905 | | | | = | 95.21% | |
| RELOCATABLE FACILITIES (PORTABLE MOVES AND PURCHASES) | | | | | | | | | | | | | |
| total cost | \$5,475,000 | / | / | | | capacity (# students) | 330 | x | student factor | 0.139 | = | \$2,306 | (elementary) |
| total cost | \$1,825,000 | / | / | | | capacity (# students) | 96 | x | student factor | 0.053 | = | \$1,008 | (middle school) |
| total cost | \$0 | / | / | | | capacity (# students) | 0 | x | student factor | 0.052 | = | \$0 | (high school) |
| TOTAL FACILITY CONSTRUCTION COST | | | | | | | | | | | = | \$3,314 | |
| Total Square Feet of Portable Space (District) | 124,600 | / Total Square Feet of School Facilities | | | | | 2,601,905 | | | | = | 4.78% | |
| TOTAL FACILITY CONSTRUCTION COST | | | | | | | | | | | = | \$159 | |
| STATE FINANCING ASSISTANCE CREDIT | | | | | | | | | | | | | |
| Const. Cost Allocation | \$375,000 | x | OSPI Allowance | 90 | x | State Financing Assistance % | 0.00% | x | student factor | 0.139 | = | \$0 | (elementary) |
| Const. Cost Allocation | \$375,000 | x | OSPI Allowance | 117 | x | State Financing Assistance % | 0.00% | x | student factor | 0.053 | = | \$0 | (middle school) |
| Const. Cost Allocation | \$375,000 | x | OSPI Allowance | 130 | x | State Financing Assistance % | 0.00% | x | student factor | 0.052 | = | \$0 | (high school) |
| TOTAL STATE MATCH CREDIT | | | | | | | | | | | = | \$0 | |
| TAX PAYMENT CREDIT | | | | | | | | | | | | | |
| [(1+ interest rate) | 3.48% |) ^ | 10 | years to pay off bond] - 1 | / | [interest rate | | | | 3.48% | x | | |
| (1+ interest rate | 3.48% |) ^ | 10 | years to pay off bond] | x | 0.000132 | | | | Property tax levy rate | x | | |
| assessed value | \$294,163 | | | | | | | | | | = | \$323 | (tax payment credit) |
| IMPACT FEE CALCULATION | | | | | | | | | | | | | |
| SITE ACQUISITION COST | \$0 | | | | | | | | | | | | |
| FACILITY CONSTRUCTION COST | \$8,679 | | | | | | | | | | | | |
| RELOCATABLE FACILITIES COST (PORTABLES) | \$159 | | | | | | | | | | | | |
| (LESS STATE FINANCING ASSISTANCE CREDIT) | \$0 | | | | | | | | | | | | |
| (LESS TAX PAYMENT CREDIT) | (\$323) | | | | | | | | | | | | |
| (LESS COUNTY DISCOUNT) | (\$4,257) | | | | | | | | | | | | |
| (LESS ELECTIVE DISTRICT DISCOUNT) | \$0 | | | | | | | | | | | | |
| FINAL IMPACT FEE PER UNIT | | | | | | | | | | | = | \$4,257 | |

Appendix B

Student Generation Rate Study



MEMORANDUM

To: Kim Ames
Everett Public Schools
3900 Broadway
Everett, WA 98201

Date: April 5, 2024

Project No.: F2253.01.003

From: Alex Brasch
Senior Population Geographer

Re: 2023–24 Student Generation Rates—Everett Public Schools

At the request of the Everett Public Schools (EPS/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 EPS 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 EPS 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 19,118 students residing within the district, 1,190 live in the 1,793 SF detached units that were built between 2015 and 2022, while 230 live in the 980 townhomes/duplexes and 477 live in the 1,961 MF units built in the same period. On average, each SF detached unit yields 0.664 K–12 students, each townhome/duplex yields 0.235 K–12 students, and each MF unit yields 0.243 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 | 1,793 | 730 | 277 | 183 | 1,190 | 0.407 | 0.154 | 0.102 | 0.664 |
| Townhome / Duplex ^(a) | 980 | 133 | 40 | 57 | 230 | 0.136 | 0.041 | 0.058 | 0.235 |
| Multifamily ^(b) | 1,961 | 273 | 103 | 101 | 477 | 0.139 | 0.053 | 0.052 | 0.243 |

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

Everett Public Schools 2023–24 headcount enrollment, Snohomish County parcels, and Puget Sound Regional Council 2015–2022 new housing inventory.

Table 2: K–12 Students by Grade Group per Housing Unit Built 2015–2022 for Multifamily Developments

| Name | Year Built | Housing Units | Students | | | | SGRs | | | |
|--|------------|---------------|----------|-----|------|------|-------|-------|-------|-------|
| | | | K–5 | 6–8 | 9–12 | K–12 | K–5 | 6–8 | 9–12 | K–12 |
| Baker Heights Property 00386200700001 | 2022 | 105 | 59 | 15 | 17 | 91 | 0.562 | 0.143 | 0.162 | 0.867 |
| The Nines 00393200102400 | 2017 | 9 | 8 | 1 | 2 | 11 | 0.889 | 0.111 | 0.222 | 1.222 |
| Kinect @ Broadway 00439076302200 | 2019 | 140 | 0 | 0 | 2 | 2 | -- | -- | 0.014 | 0.014 |
| Rockefeller Square 00439161001000 | 2021 | 31 | 0 | 0 | 0 | 0 | -- | -- | -- | -- |
| Marquee Apts. 00439162600800 | 2021 | 77 | 2 | 0 | 0 | 2 | 0.026 | -- | -- | 0.026 |
| Nimbus Apts. 00439162700100 | 2022 | 166 | 1 | 0 | 1 | 2 | 0.006 | -- | 0.006 | 0.012 |
| The Landing at Port Gardner 00451401301700 | 2019 | 52 | 1 | 0 | 0 | 1 | 0.019 | -- | -- | 0.019 |
| Riverview Apts. 00556332400500 | 2020 | 203 | 5 | 1 | 0 | 6 | 0.025 | 0.005 | -- | 0.030 |
| 4220 Colby Ave 00582202100600 | 2019 | 18 | 0 | 0 | 1 | 1 | -- | -- | 0.056 | 0.056 |
| Gateway Apts. 00633800002400 | 2017 | 177 | 75 | 44 | 43 | 162 | 0.424 | 0.249 | 0.243 | 0.915 |
| Farm by Vintage Apts. 01213100000101 | 2020 | 354 | 77 | 32 | 22 | 131 | 0.218 | 0.090 | 0.062 | 0.370 |
| Hamptons At Mill Creek 27050400200300 | 2019 | 71 | 4 | 2 | 0 | 6 | 0.056 | 0.028 | -- | 0.085 |
| Trinity Apts. 27050400200400 | 2017 | 51 | 13 | 1 | 4 | 18 | 0.255 | 0.020 | 0.078 | 0.353 |
| Silver Creek Apts. 27051700303200 | 2020 | 42 | 2 | 1 | 3 | 6 | 0.048 | 0.024 | 0.071 | 0.143 |
| North Creek Landing 27051800102300 | 2019 | 20 | 2 | 3 | 0 | 5 | 0.100 | 0.150 | -- | 0.250 |
| Northlake Court Townhomes 28051900103200 | 2015 | 55 | 21 | 3 | 4 | 28 | 0.382 | 0.055 | 0.073 | 0.509 |
| Koz on N. Broadway 29051700203200 | 2020 | 124 | 0 | 0 | 1 | 1 | -- | -- | 0.008 | 0.008 |
| Waterfront Place 29051800402000 | 2020 | 266 | 3 | 0 | 1 | 4 | 0.011 | -- | 0.004 | 0.015 |

Notes

Housing units built in 2023 are excluded, because they may not have been completed and occupied by October 2023. 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

Everett Public Schools 2023–24 headcount enrollment, Snohomish County parcels, and Puget Sound Regional Council 2015–2022 new housing inventory.

Appendix C

OSPI Enrollment Projection Methodology

OSPI PROJECTED STUDENT ENROLLMENT 2024-2029

| School Type | Grade Level | School Year & Grade Progression Percentage | | | | | | | | | | | | AVG GP% | |
|-------------|-------------|--|--------|---------|--------|---------|--------|---------|--------|---------|--------|---------|--------|---------|----|
| | | 2024 | GP% | 2025 | GP% | 2026 | GP% | 2027 | GP% | 2028 | GP% | 2029 | GP% | | |
| Elementary | K | 1,477 | -- | 1,453 | -- | 1,430 | -- | 1,406 | -- | 1,382 | -- | 1,359 | -- | -- | -- |
| | 1 | 1,556 | 102.3% | 1,511 | 102.3% | 1,487 | 102.3% | 1,463 | 102.3% | 1,439 | 102.3% | 1,414 | 102.3% | 102.3% | |
| | 2 | 1,601 | 100.3% | 1,561 | 100.3% | 1,516 | 100.3% | 1,492 | 100.3% | 1,468 | 100.3% | 1,443 | 100.3% | 100.3% | |
| | 3 | 1,626 | 99.3% | 1,589 | 99.3% | 1,549 | 99.2% | 1,504 | 99.2% | 1,481 | 99.3% | 1,457 | 99.3% | 99.2% | |
| | 4 | 1,567 | 98.9% | 1,609 | 99.0% | 1,572 | 98.9% | 1,533 | 99.0% | 1,488 | 98.9% | 1,465 | 98.9% | 98.9% | |
| Middle | 5 | 1,572 | 99.1% | 1,553 | 99.1% | 1,595 | 99.1% | 1,558 | 99.1% | 1,519 | 99.1% | 1,475 | 99.1% | 99.1% | |
| | 6 | 1,593 | 98.5% | 1,547 | 98.4% | 1,529 | 98.5% | 1,570 | 98.4% | 1,534 | 98.5% | 1,495 | 98.4% | 98.4% | |
| | 7 | 1,550 | 98.2% | 1,564 | 98.2% | 1,519 | 98.2% | 1,501 | 98.2% | 1,541 | 98.2% | 1,506 | 98.2% | 98.2% | |
| | 8 | 1,472 | 98.1% | 1,521 | 98.1% | 1,535 | 98.1% | 1,491 | 98.2% | 1,473 | 98.1% | 1,512 | 98.1% | 98.1% | |
| High | 9 | 1,388 | 96.9% | 1,426 | 96.9% | 1,473 | 96.8% | 1,487 | 96.9% | 1,444 | 96.8% | 1,427 | 96.9% | 96.9% | |
| | 10 | 1,446 | 96.5% | 1,339 | 96.5% | 1,376 | 96.5% | 1,421 | 96.5% | 1,435 | 96.5% | 1,393 | 96.5% | 96.5% | |
| | 11 | 1,372 | 92.0% | 1,329 | 91.9% | 1,231 | 91.9% | 1,265 | 91.9% | 1,306 | 91.9% | 1,319 | 91.9% | 91.9% | |
| | 12 | 1,217 | 94.3% | 1,294 | 94.3% | 1,253 | 94.3% | 1,161 | 94.3% | 1,193 | 94.3% | 1,232 | 94.3% | 94.3% | |
| | | Growth% | | Growth% | | Growth% | | Growth% | | Growth% | | Growth% | | Growth% | |
| Elementary | | 9,399 | 98.5% | 9,276 | 98.7% | 9,149 | 98.6% | 8,956 | 97.9% | 8,777 | 98.0% | 8,613 | 98.1% | 98.3% | |
| | Middle | 4,615 | 102.3% | 4,632 | 100.4% | 4,583 | 98.9% | 4,562 | 99.5% | 4,548 | 99.7% | 4,513 | 99.2% | 100.0% | |
| | High | 5,423 | 98.2% | 5,388 | 99.4% | 5,333 | 99.0% | 5,334 | 100.0% | 5,378 | 100.8% | 5,371 | 99.9% | 99.5% | |
| TOTAL | | 19,437 | 99.3% | 19,296 | 99.3% | 19,065 | 98.8% | 18,852 | 98.9% | 18,703 | 99.2% | 18,497 | 98.9% | 99.1% | |

Source: OSPI Report 1049

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

Appendix D

OFM Ratio Enrollment Projection Methodology

**Appendix D
Enrollment Forecasts
Ratio Method**

The Growth Management Act requires that capital facility plans for schools consider *enrollment* forecasts that are related to official *population* forecasts for the District. Snohomish County prepares the population estimates by distributing official estimates from the Washington Office of Financial Management (OFM) to the school district level. In February 2022 the County adopted updated official school district population projections through 2044 (the horizon year for its GMA planning).

| Table D-1 Historical Student/Population Ratio | | | |
|--|--------------------|-------------------------------|--------------|
| Year | Population* | FTE Student Enrollment | Ratio |
| 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% |
| 2018 | 148,092 | 20,051 | 13.54% |
| 2019 | 149,372 | 20,143 | 13.49% |
| 2020 | 148,194 | 19,525 | 13.18% |
| 2021 | 150,072 | 19,620 | 13.07% |
| 2022 | 151,916 | 19,555 | 12.87% |
| 2023 | 152,913 | 19,576 | 12.80% |
| Projected | | | |
| 2024 | 155,916 | 19,645 | 12.60% |
| 2025 | 158,642 | 19,803 | 12.48% |
| 2026 | 161,368 | 19,965 | 12.37% |
| 2027 | 163,817 | 20,143 | 12.30% |
| 2044 | 214,341 | 23,578 | 11.00% |

The official Census population count for Snohomish County in 2020 was 827,957. The official population projections for all of Snohomish County is 1,136,310 in 2044. For the Everett School District, the County’s official Census total in 2020 is 148,194, increasing to an estimated 214,341 in 2044.

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. Table D-1 shows population estimates developed by Snohomish County over the past 27 years. Years 2010 and 2020 are official Census counts. Past enrollments as reported by the Office of the Superintendent of Public Instruction (OSPI) are shown along with the computed ratio of the population and enrollment figures.

Ratio estimates have shown a continual decline since 2006, reflecting a decline in the students per household as the population grows. A more significant decline in the ratio occurred in 2020-21, likely due to the effects of the COVID pandemic with its remote teaching, home schooling, student transfers and other anomalies. Future ratio trends and enrollment estimates (Table D-2) did not rely on 2020-21 numbers for this reason.

For its planning purposes, the District has accepted the County’s estimated population for 2044 (214,341). The 2024-2044 population estimates were prorated using that figure, an average of

2,726 new residents per year through 2029 and 3005 new residents per year through 2044. These are official estimates from the County. The District assumes that the student population ratio will decline to 11.00% in 2044. The resulting enrollment forecasts are presented on Table D-2.

| Table D-2 | | | | | | | | |
|---|-------------|------------------|-------------|-------------|-------------|-------------|-------------|-------------|
| Future Enrollments -- Ratio Method | | | | | | | | |
| Actual | | Estimated | | | | | | |
| 2022 | 2023 | 2024 | 2025 | 2026 | 2027 | 2028 | 2029 | 2044 |
| Population | | | | | | | | |
| 151,916 | 152,913 | 155,916 | 158,642 | 161,368 | 163,817 | 166,543 | 169,266 | 214,341 |
| Ratio | | | | | | | | |
| 12.87% | 12.80% | 12.60% | 12.48% | 12.37% | 12.30% | 12.22% | 12.14% | 11.00% |
| Enrollment | | | | | | | | |
| 19,555 | 19,576 | 19,645 | 19,803 | 19,965 | 20,143 | 20,350 | 20,522 | 23,578 |

Readers are reminded that long range enrollment forecasts are general estimates only. They will be reviewed and revised every two years as part of the updates required by County Code (SCC 30.66C).

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., 2nd grade) to the enrollment at the previous grade from the previous year (1st 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's grade level enrollment (e.g., 2nd grade) to predict next year's enrollment at the subsequent grade (e.g., 3rd grade). This was done for every grade except kindergarten. The numbers were then adjusted and modified based on additional information about housing and population growth within the District (more on this below).

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

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

**Kendrick Enrollment Projections – Medium Range
2024-29**

Enrollment Projections by Grade

| Grade Level | Actual 2023 | Projections | | | | | |
|--------------|---------------|---------------|---------------|---------------|---------------|---------------|---------------|
| | | 2024 | 2025 | 2026 | 2027 | 2028 | 2029 |
| K | 1,521 | 1,518 | 1,478 | 1,566 | 1,598 | 1,597 | 1,601 |
| 1 | 1,596 | 1,582 | 1,557 | 1,519 | 1,604 | 1,637 | 1,636 |
| 2 | 1,638 | 1,609 | 1,602 | 1,580 | 1,537 | 1,623 | 1,656 |
| 3 | 1,584 | 1,657 | 1,624 | 1,621 | 1,593 | 1,550 | 1,637 |
| 4 | 1,586 | 1,584 | 1,666 | 1,636 | 1,628 | 1,600 | 1,557 |
| 5 | 1,618 | 1,596 | 1,596 | 1,681 | 1,647 | 1,638 | 1,611 |
| 6 | 1,579 | 1,618 | 1,585 | 1,588 | 1,668 | 1,634 | 1,625 |
| 7 | 1,500 | 1,578 | 1,623 | 1,593 | 1,596 | 1,676 | 1,642 |
| 8 | 1,433 | 1,470 | 1,573 | 1,622 | 1,587 | 1,590 | 1,670 |
| 9 | 1,498 | 1,398 | 1,454 | 1,559 | 1,603 | 1,568 | 1,571 |
| 10 | 1,492 | 1,439 | 1,368 | 1,425 | 1,524 | 1,567 | 1,533 |
| 11 | 1,291 | 1,382 | 1,339 | 1,276 | 1,325 | 1,417 | 1,457 |
| 12 | 1,240 | 1,215 | 1,338 | 1,299 | 1,234 | 1,282 | 1,371 |
| Total | 19,576 | 19,646 | 19,803 | 19,965 | 20,144 | 20,379 | 20,567 |

Enrollment Projections by Level

| | | | | | | | |
|-------------|-------|-------|-------|-------|-------|-------|-------|
| K-5 | 9,543 | 9,546 | 9,523 | 9,603 | 9,607 | 9,645 | 9,698 |
| 6-8 | 4,512 | 4,666 | 4,781 | 4,803 | 4,851 | 4,900 | 4,937 |
| 9-12 | 5,521 | 5,434 | 5,499 | 5,559 | 5,686 | 5,834 | 5,932 |

Appendix F

Levels of Service Report

2023-2024

Levels of Service Report

(October 2023 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 and no larger than the class size goals. The class size goals are listed on page 2-4. The average class sizes for the 2023-24 school year are shown below.

| Average Class Size | |
|---------------------------|----------------------|
| | Elementary |
| Kindergarten | 20.0 |
| Grades 1 - 3 | 21.0 |
| Grades 4 - 5 | 25.9 |
| | Middle School |
| Grades 6 - 8 | 23.7 |
| | High School |
| Grades 9 - 12 | 24.7 |

Appendix G

Impact Fee Report

Annual School District Report of Impact Fees Collected and Spent

Reporting Year (Calendar Year): 2022
School District Name: Everett School District #2
Date Submitted: 3/8/2023
Report Submitted By: Kim Ames, Facilities and Planning Specialist

IMPACT FEE RECEIPTS for reporting period (calendar year)

Total Amount Received: \$31,884
Details of Amount Received: (See Appendix A for listing of sources and amounts collected from each source.)

EXPENDITURES OF IMPACT FEES for reporting period (calendar year), received from Snohomish County,

Total Expenditures: \$758.34

List of Capital Facilities Projects and expenditure for each:

| <u>Project Name</u> | <u>Expenditures for Reporting Year</u> |
|--------------------------|--|
| Merchant Fees Sno County | \$758.34 |



Annual School District Report of Impact Fees Collected and Spent

Reporting Year (Calendar Year): 2023
School District Name: Everett School District #2
Date Submitted: 3/29/2024
Report Submitted By: Kim Ames, Facilities and Planning Specialist

IMPACT FEE RECEIPTS for reporting period (calendar year)

Total Amount Received: \$184,158
Details of Amount Received: (See Appendix A for listing of sources and amounts collected from each source.)

EXPENDITURES OF IMPACT FEES for reporting period (calendar year), received from Snohomish County,

Total Expenditures: \$725,049.32

List of Capital Facilities Projects and expenditure for each:

| <u>Project Name</u> | <u>Expenditures for Reporting Year</u> |
|-------------------------------|--|
| Merchant Fees Sno County | \$3,451.05 |
| View Ridge ES Portable Moves | \$260,413.22 |
| Woodside ES Portable Moves | \$298,039.49 |
| Mill Creek ES Portable Moves | \$92,538.51 |
| Penny Creek ES Portable Moves | \$70,607.05 |

GRANITE FALLS SCHOOL DISTRICT
CAPITAL FACILITIES PLAN
2024–2029



Adopted: June 26, 2024

GRANITE FALLS SCHOOL DISTRICT
CAPITAL FACILITIES PLAN
2024-2029

BOARD OF DIRECTORS

Carl G. Cary, President
Karley Kincaid, Vice-President
Bill Dane
Erik Gochnour
Peter LeDoux

SUPERINTENDENT

Dana Geaslen

For information regarding the Granite Falls School District Capital Facilities Plan, contact the Office of the Superintendent, District Administration Office, 205 North Alder Avenue, Granite Falls, Washington 98252. Telephone: (360) 691-7717.

Approved by the Board of Directors on June 26, 2024

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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.

Granite Falls School District (the “District”) has prepared this Capital Facilities Plan (the “CFP”) to provide Snohomish County (the “County”) and the City of Granite Falls (the “City”) with a schedule and financing program for capital improvements over the next six years (2024-2029).

In accordance with the Growth Management Act, 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 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:

- Districts should use information from recognized sources, such as the U.S. Census or the Puget Sound Regional Council. 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 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 of Washington (the “State”), the 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 must comply with the criteria and the formulas established by the County and the City.

The County’s Countywide Planning Policies direct jurisdictions within the 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.

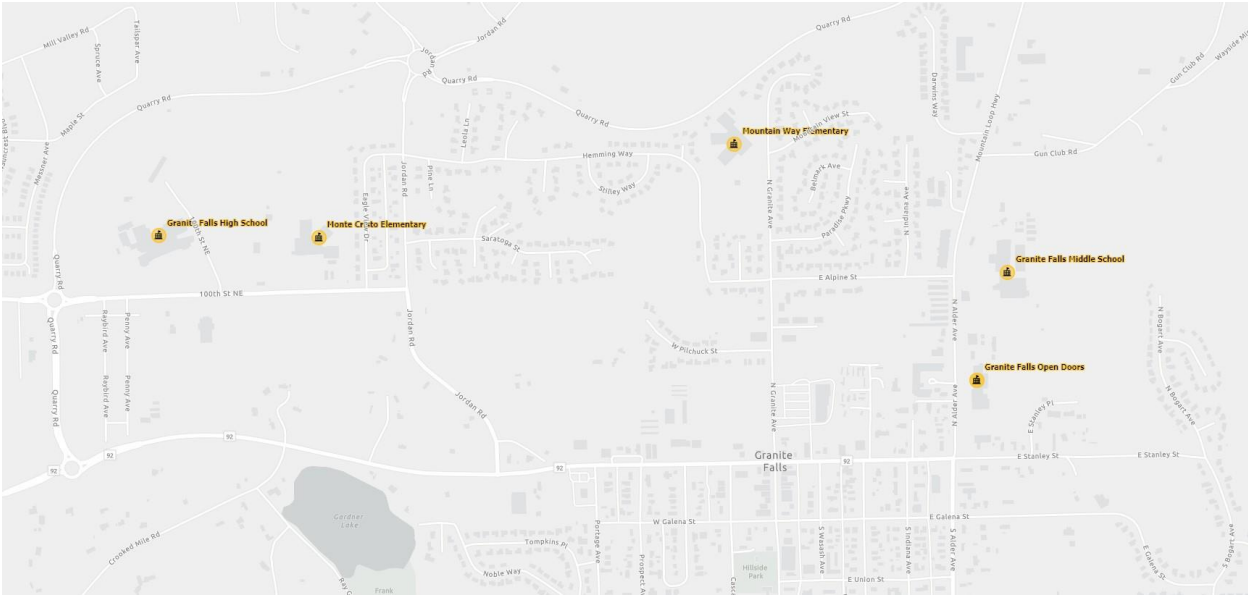
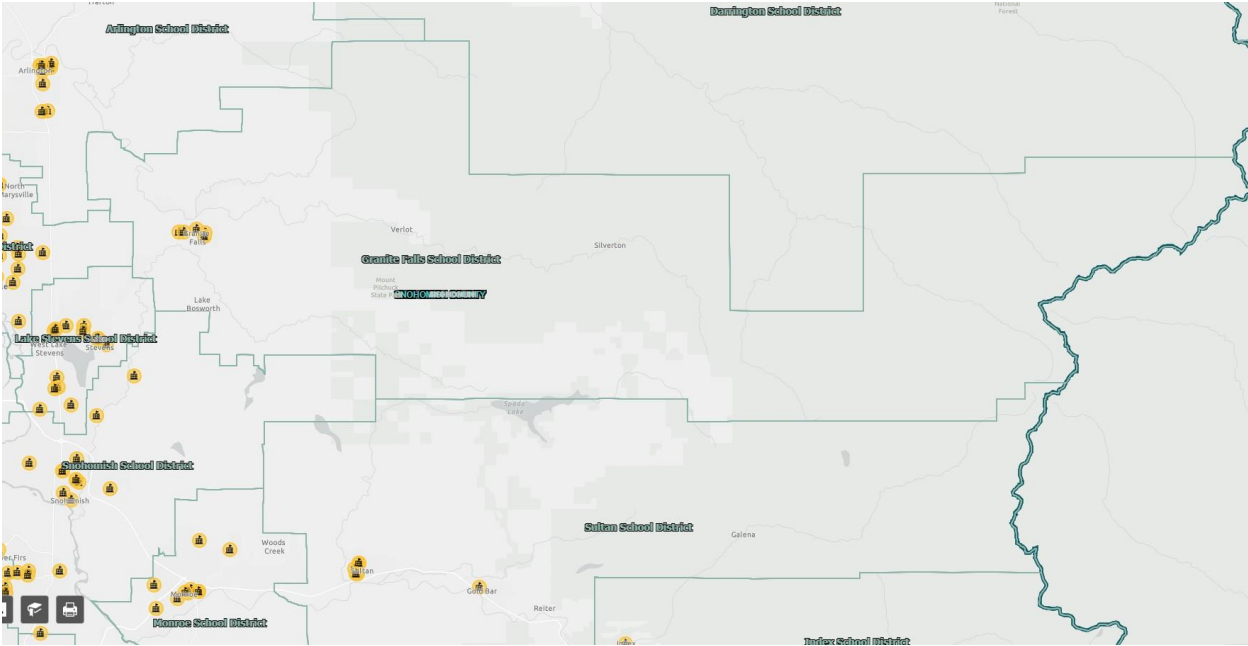
B. Overview of the District

The District’s service area includes 466 square miles within the County, encompassing the City of Granite Falls and portions of unincorporated Snohomish County.

The District serves a student population of 2,146 (October 1, 2023 HC enrollment) with two elementary schools (K-2 and 3-5), one middle school (grades 6-8), one high school (grades 9-12), and one alternative high school (grades 9-12). For the purposes of facility planning, this CFP considers grades K-5 as elementary, grades 6-8 as middle school, and grades 9-12 as high school. For purposes of this CFP, capacity and enrollment in the alternative high school programs at Crossroads and Open Doors Academy are not included due to the specialized program criteria and, for Crossroads, a cooperative agreement to serve students from Lake Stevens School District.

The District has experienced moderate growth in recent years. Growth has been steady in the District since 2018 and is projected to continue to increase at all grade levels over the six year planning period. The District commissioned a Long-Range Facility Planning Report in 2023 in anticipation of potential growth, enrollment increases, and future capacity needs. This CFP identifies capital projects within the six year planning period needed to meet growth-related needs. These include projects to add permanent classrooms at both District elementary schools, which would increase permanent capacity by approximately 322 student seats, and an addition at Granite Falls Middle School to increase permanent capacity by 232 student seats. The schools will also be modernized/remodeled. The District is also beginning to plan for high school capacity solutions as growth continues at those grade levels.

FIGURE 1 - MAP OF DISTRICT AND FACILITIES



SECTION 2 DISTRICT EDUCATIONAL PROGRAM STANDARDS

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

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

A. Districtwide Educational Program Standards

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

- Early Childhood Education, including ECEAP Preschool and Developmental Preschool;
- Highly Capable Program;
- English Language Learners; and
- Title 1 and Learning Assistance Programs.

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 that 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 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 17 students, with a maximum average class size of 20 students (including for physical education, health, and library classes);
- Class size for grades 4 and 5 is targeted not to exceed 25 students, with a maximum average class size of 28 students;

C. Educational Program Standards for Middle and High Schools

- Class size for middle school grades 6–8 is targeted not to exceed 29 students, with a maximum average class size of 33 students
- Class size for high school grades 9-12 is targeted not to exceed 29 students, with a maximum average class size of 33 students;
- 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 Rooms.
 3. Program Specific Classrooms (i.e., music, drama, art, culinary and manufacturing).

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 33 students and average class size in 9-12 classrooms will not exceed 33 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 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 |
| | 33 | 21.61 | 33 | 31.06 | 33 | 26.39 |

* 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.

| | | | | | | |
|------------------------|--|--|-----------------------------------|------------------------------------|---------------------------------|----------------------------------|
| 2022-23 School Year | | | | | | |
| LOS Standard | MINIMUM LOS# Elementary | REPORTED LOS Elementary | MINIMUM LOS Middle | REPORTED LOS Middle | MINIMUM LOS High | REPORTED LOS High |
| | 33 | 23.34 | 33 | 30.63 | 33 | 28.11 |

* 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 two elementary schools, one middle school, one high school, and an alternative high school. Mountain Way Elementary currently accommodates grades K-2, Monte Cristo Elementary serves grades 3-5, Granite Falls Middle School serves grades 6-8, and Granite Falls High School and Crossroads High School each serve 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. Special purpose program spaces are not included within the “Teaching Station” count. The school capacity inventory is summarized in Tables 1, 2, and 3.

The alternative high school (Crossroads) is housed in separate District-owned facilities, and is 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**

| Elementary School | Site Size (Acres) | Building Area (Square Feet) | Teaching Stations | Permanent Capacity | Year Built or Remodeled |
|-------------------------|----------------------|--------------------------------|----------------------|-----------------------|----------------------------|
| Mountain Way Elementary | 9.91 | 51,515 | 22 | 506 | 1989 |
| Monte Cristo Elementary | 26.0 ⁽²⁾ | 51,530 | 19 | 485 | 1995 |
| TOTAL | 35.91 | 103,045 | 41 | 991 | |

⁽¹⁾ Campus includes Granite Falls High School and the District’s maintenance building.

**Table 2
Middle School Inventory**

| Middle School | Site Size (Acres) | Building Area (Square Feet) | Teaching Stations | Permanent Capacity | Year Built or Remodeled |
|----------------------|--------------------------|------------------------------------|--------------------------|---------------------------|--------------------------------|
| Granite Falls Middle | 24.5 ⁽¹⁾ | 80,617 ⁽²⁾ | 16 | 464 | 1974, 2001, 2019 |

⁽¹⁾ Campus includes the District’s Administration Building and Crossroads High School.

⁽²⁾ Includes main instructional building (63,091 sq. ft.), multi-purpose room (4,458 sq. ft.), and STEAM building (13,068 sq. ft.).

**Table 3
High School Inventory**

| High School | Site Size (Acres) | Building Area (Square Feet) | Teaching Stations | Permanent Capacity | Year Built or Remodeled |
|--------------------|--------------------------|------------------------------------|--------------------------|---------------------------|--------------------------------|
| Granite Falls High | 26.0 ⁽¹⁾ | 132,718 | 18 | 522 | 2008 |

⁽¹⁾ Campus includes Monte Cristo Elementary School and the District’s maintenance building.

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 14 relocatable classrooms at various school sites throughout the District to provide additional interim capacity (an additional three relocatable classrooms are located at Crossroads High 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 2023-24 school year of relocatable classrooms throughout the District is summarized in Table 4.

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

| Elementary School | Relocatables | Interim Capacity |
|--------------------------|---------------------|-------------------------|
| Mountain Way Elementary | 4 | 92 |
| Monte Cristo Elementary | 4 | 96 |
| Middle School | Relocatables | Interim Capacity |
| Granite Falls Middle | 6 | 159 |
| High School | Relocatables | Interim Capacity |
| Granite Falls High | 0 | 0 |
| TOTAL | 14 | 347 |

C. Support Facilities

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

**Table 5
Support Facility Inventory**

| Facility | Building Area (Square Feet) | Site Location | Address |
|------------------------------------|--|-------------------------|-------------------|
| Administration | 52,819 | Administration Building | 205 N. Alder Ave. |
| Technology Services ⁽¹⁾ | 3,200 | Pop Rogers Building | 307 N. Alder Ave. |
| Maintenance & Operations | 52,819 | Maintenance Building | 1401 100th St. NE |

⁽¹⁾The Granite Falls Food Bank occupies approximately 75 percent of the building.

D. Land Inventory

The District owns undeveloped property adjacent to Granite Falls Middle School; the property is marshland and unsuitable for development.

E. Leased Facilities

The District does not lease any facilities for program needs. The District does lease space in the Pop Rogers Building to the local food bank.

**SECTION 4
STUDENT ENROLLMENT PROJECTIONS**

A. *Projected Student Enrollment 2024-2029*

Enrollment projections are most accurate for the initial years of the forecast period. 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, applying a weighted average from the most recent years to project future enrollment. The OSPI cohort survival projections are included in Appendix A. Using these projections, the District anticipates an increase in enrollment increase of approximately 13.4% by the 2029-30 school year, with growth occurring at all grade levels.

OFM population-based enrollment projections were estimated for the District using OFM population forecasts as adopted by Snohomish County. Between 2018 and 2023, the District’s total enrollment constituted 13.0% of the total population in the District. Assuming that between 2024 and 2029 the District’s total enrollment will constitute 13.0% of the District’s total population and using OFM/County data, a total enrollment of 2,327 HC is projected in 2029.

**Table 6
Projected Student Enrollment
2023-2029**

| | | | | | | | | Change | % Change |
|-------------------|--------------|-------------|-------------|-------------|-------------|-------------|-------------|---------------|-----------------|
| Projection | 2023* | 2024 | 2025 | 2026 | 2027 | 2028 | 2029 | 23-29 | 23-29 |
| District/OSPI | 2,146 | 2,238 | 2,268 | 2,304 | 2,351 | 2,379 | 2,434 | 288 | 13.4% |
| OFM/County | 2,146 | 2,176 | 2,206 | 2,236 | 2,266 | 2,296 | 2,327 | 181 | 8% |

* Actual October 2023 HC enrollment (including Crossroads)

For purposes of the capacity need analysis in Table 8B, the District uses the OSPI cohort survival projections as adjusted for students expected to be enrolled at Crossroads. Specifically, Table 8B uses the adjusted cohort survival projections, which figures reflect the “District/OSPI” figures in Table 6 above, with a downward adjustment for anticipated Crossroads enrollment. The District will monitor actual enrollment over the next two years and, if necessary, make appropriate adjustments in the next Plan update.

B. 2044 Enrollment Projections

Student enrollment projections beyond 2029 are highly speculative. Based on OFM/County data for 2044 and an estimated student-to-population ratio of 13%, 2,523 HC students are projected for 2044. 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 2044¹ 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)
2044**

| Grade Span | Projected Enrollment |
|---------------------|-----------------------------|
| Elementary (K-5) | 1,160 |
| Middle School (6-8) | 530 |
| High School (9-12) | 833 |
| TOTAL (K-12) | 2,523 |

¹ Snohomish County Planning & Development Services provided the underlying data for the 2044 projections.

**SECTION 5
CAPITAL FACILITIES NEEDS**

Projected available student capacity was derived by subtracting projected student enrollment (as adjusted) from existing school capacity (excluding relocatable classrooms) for each of the six years in the forecast period (2024-2029). 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**

| Grade Span | 2029 Projected Unhoused Students - Total | 2029 Projected Unhoused Students – Growth Post-2023 |
|---------------------|---|--|
| Elementary (K-5) | 67 | 67 |
| Middle School (6-8) | 126 | 126 |
| High School (9-12) | 48 | 48 |
| TOTAL (K-12) | 241 | 241 |

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 2029 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
2024 - 2029**

Elementary School Surplus/Deficiency

| Elementary | 2023 | 2024 | 2025 | 2026 | 2027 | 2028 | 2029 |
|----------------------|-------------|-------------|-------------|-------------|-------------|-------------|-------------|
| Existing Capacity | 991 | 991 | 991 | 991 | 991 | 991 | 991 |
| Added Capacity | | | | | | | 322 |
| Total Capacity | 991 | 991 | 991 | 991 | 991 | 991 | 1,313 |
| Enrollment | 977 | 989 | 1,003 | 1,040 | 1,041 | 1,057 | 1,074 |
| Surplus (Deficiency) | 14 | 2 | (12) | (49) | (50) | (66) | 239 |

Middle School Surplus/Deficiency

| Middle | 2023 | 2024 | 2025 | 2026 | 2027 | 2028 | 2029 |
|----------------------|-------------|-------------|-------------|-------------|-------------|-------------|-------------|
| Existing Capacity | 464 | 464 | 464 | 464 | 464 | 464 | 464 |
| Added Capacity | | | | | | | 232 |
| Total Capacity | 464 | 464 | 464 | 464 | 464 | 464 | 696 |
| Enrollment | 460 | 468 | 498 | 532 | 550 | 559 | 590 |
| Surplus (Deficiency) | 4 | (4) | (34) | (68) | (86) | (95) | 106 |

High School Surplus/Deficiency

| High | 2023 | 2024 | 2025 | 2026 | 2027 | 2028 | 2029 |
|----------------------|-------------|-------------|-------------|-------------|-------------|-------------|-------------|
| Existing Capacity | 522 | 522 | 522 | 522 | 522 | 522 | 522 |
| Added Capacity | | | | | | | |
| Total Capacity | 522 | 522 | 522 | 522 | 522 | 522 | 522 |
| Enrollment | 509 | 581 | 567 | 532 | 560 | 563 | 570 |
| Surplus (Deficiency) | 13 | (59) | (45) | (10) | (38) | (41) | (48) |

*Enrollment reflects the “District/OSPI” projections in Table 6 with a downward adjustment for students expected to be enrolled at Crossroads. See page 13.

**SECTION 6
CAPITAL FACILITIES FINANCING PLAN**

A. *Planned Improvements*

After conducting a Long Range Facility Planning process (completed in July 2023), the District has identified several capacity projects within the six year planning period needed to meet growth-related needs.

Permanent Capacity Adding Projects:

- Expanding Mountain Way Elementary School by adding eight new permanent classrooms, resulting in an increase in permanent capacity of 184 student seats. (Anticipated completion in 2029.)
- Expanding Monte Cristo Elementary School by adding six new permanent classrooms, resulting in an increase in permanent capacity of 138 student seats. (Anticipated completion in 2029.)
- Expanding Granite Falls Middle School by adding eight new permanent classrooms, resulting in an increase in permanent capacity of 232 students.
- Adding a new Early Learning Center, including kindergarten, which will relieve capacity at Mountain Way Elementary School.

The classroom addition projects described above will include expansion of core facilities needed to support the expanded capacity at the subject schools.

Noncapacity Projects:

- Modernization of the existing facilities for Mountain Way Elementary School, Monte Cristo Elementary School, and Granite Falls Middle School.

The District is starting to plan for high school capacity solutions as growth continues at those grade levels. 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 April 2022, the District presented a \$3,000,000 technology and school improvements capital levy measure to its voters. The voters approved the levy, which includes funding for, among other things, the acquisition of computers and other technology equipment for student learning, and safety, energy efficiency and other capital improvements to school facilities. Subject to future Board action, the District anticipates presenting a bond proposal to the voters in 2027, which would include the addition/modernization projects at Mountain Way Elementary School, Monte Cristo Elementary School, Granite Falls Elementary School, and a new Early Learning Center.

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 57.08% level for eligible projects. 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.

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 2024-2029. The anticipated financing components include future bond revenue, impact fees, and other future sources. Projects and portions of projects that remedy existing deficiencies are not appropriate for impact fee funding. Thus, impact fees will not be used to finance projects or portions of projects which do not add capacity or which remedy existing deficiencies.

**Table 9
Capital Facilities Financing Plan**

Improvements Adding Permanent Capacity (Costs in Millions)

| Project | 2024 | 2025 | 2026 | 2027 | 2028 | 2029 | Total Cost | Bonds/ Levy/Other Local | State Match | Impact Fees |
|---------------------------|------|------|------|------|----------|----------|------------|-------------------------------|----------------|----------------|
| Elementary | | | | | | | | | | |
| Mountain Way Addition | | | | | \$12.870 | | \$12.870 | X | X | X |
| Monte Cristo Addition | | | | | \$11.160 | | \$11.160 | X | | X |
| Early Learning Center | | | | | | \$35.000 | \$35.000 | X | | X |
| Middle School | | | | | | | | | | |
| Granite Falls MS Addition | | | | | \$14.150 | | \$14.150 | X | | X |
| High School | | | | | | | | | | |

Improvements Adding Temporary Capacity (Costs in Millions)

| Project | 2024 | 2025 | 2026 | 2027 | 2028 | 2029 | Total Cost | Bonds/ Levy/Other Local | State Match | Impact Fees |
|------------------|------|------|------|------|------|------|------------|-------------------------------|----------------|----------------|
| Portables | | | | | | | | | | |
| Various sites | | | | | | | TBD | | | X |

Noncapacity Improvements (Costs in Millions)

| Project | 2024 | 2025 | 2026 | 2027 | 2028 | 2029 | Total Cost | Bonds/ Levy/Other Local | State Match | Impact Fees |
|--------------------------------|------|------|------|------|----------|------|------------|-------------------------------|----------------|----------------|
| Elementary | | | | | | | | | | |
| Mountain Way Modernization | | | | | \$30.430 | | \$30.430 | X | X | |
| Monte Cristo Modernization | | | | | \$39.092 | | \$39.092 | X | | |
| Middle School | | | | | | | | | | |
| Granite Falls MS Modernization | | | | | \$57.040 | | \$57.040 | X | | |
| High School | | | | | | | | | | |
| Other | | | | | | | | | | |

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 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 and the City of Granite Falls’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.

- The Site Acquisition Cost, School Construction Cost, and Temporary/Portable Facility Cost factors are based on planned or actual costs (on/off site required improvements) of growth-related school capacity. Costs vary with each site and each facility. See Table 9, 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 for the first time a data set for multi-family dwelling units of one bedroom and less. However, the low rate of students residing in these units does not generate an impact fee.

- 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. 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 District’s growth-related needs, as demonstrated in Table 8-A. For purposes of this Plan, the District’s capacity adding projects are 100% growth-related. 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 Mountain Way Elementary School.
- A capacity addition at Granite Falls Middle School

Please see Table 11 for relevant cost data related to each capacity project. The capacity addition at Monte Cristo Elementary School is not included in the impact fee calculation (as the Mountain Way Elementary School is used as the representative K-5 capacity project) but is eligible for impact fee revenue contribution as a growth-related project.

C. Proposed Granite Falls 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
2024**

| Housing Type | Impact Fee Per Dwelling Unit |
|---------------------------|---|
| Single Family | \$6,368 |
| Townhomes/Duplex | \$3,160 |
| Multi-Family (1 Bedroom) | No fee (\$0) |
| Multi-Family (2+ Bedroom) | \$3,160 |

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

APPENDIX A

POPULATION AND ENROLLMENT DATA

| Grade | 2018 Actual | 2019 Actual | 2020 Actual | 2021 Actual | 2022 Actual | 2023 Actual | Survival Percentage | 2024 Projected | 2025 Projected | 2026 Projected | 2027 Projected | 2028 Projected | 2029 Projected |
|--------------|----------------|----------------|----------------|----------------|----------------|----------------|------------------------|-------------------|-------------------|-------------------|-------------------|-------------------|-------------------|
| Kindergarten | 158 | 158 | 124 | 174 | 165 | 159 | | 164 | 166 | 168 | 170 | 173 | 175 |
| Grade 1 | 114 | 171 | 156 | 136 | 180 | 163 | 103.76 | 165 | 170 | 172 | 174 | 176 | 180 |
| Grade 2 | 123 | 116 | 167 | 159 | 141 | 176 | 100.55 | 164 | 166 | 171 | 173 | 175 | 177 |
| Grade 3 | 148 | 132 | 108 | 163 | 164 | 141 | 100.23 | 176 | 164 | 166 | 171 | 173 | 175 |
| Grade 4 | 151 | 158 | 134 | 111 | 178 | 165 | 104.16 | 147 | 183 | 171 | 173 | 178 | 180 |
| Grade 5 | 141 | 155 | 162 | 143 | 129 | 173 | 105.05 | 173 | 154 | 192 | 180 | 182 | 187 |
| Grade 6 | 169 | 148 | 157 | 157 | 152 | 125 | 101.26 | 175 | 175 | 156 | 194 | 182 | 184 |
| Grade 7 | 141 | 175 | 164 | 171 | 170 | 157 | 106.96 | 134 | 187 | 187 | 167 | 208 | 195 |
| Grade 8 | 126 | 151 | 163 | 169 | 168 | 178 | 101.24 | 159 | 136 | 189 | 189 | 169 | 211 |
| Grade 9 | 163 | 120 | 160 | 172 | 183 | 169 | 103.11 | 184 | 164 | 140 | 195 | 195 | 174 |
| Grade 10 | 129 | 167 | 128 | 163 | 177 | 177 | 102.12 | 173 | 188 | 167 | 143 | 199 | 199 |
| Grade 11 | 137 | 132 | 182 | 131 | 169 | 190 | 104.93 | 186 | 182 | 197 | 175 | 150 | 209 |
| Grade 12 | 153 | 154 | 213 | 209 | 177 | 173 | 125.21 | 238 | 233 | 228 | 247 | 219 | 188 |
| Total | 1,853 | 1,937 | 2,018 | 2,058 | 2,153 | 2,146 | | 2,238 | 2,268 | 2,304 | 2,351 | 2,379 | 2,434 |

Source: OSPI Form 1049 - January 2024

APPENDIX B

STUDENT GENERATION FACTOR REVIEW

The District does not yet have a reliable data set for purposes of calculating student generation rates. This is due in part to recent development moratoria in the City of Granite Falls. As such, the District has calculated student generation rates using an average of the rates published in the 2022 capital facilities plans (the last County-adopted set of plans) for the four school districts immediately surrounding Granite Falls School District: Arlington School District, Lake Stevens School District, Marysville School District, and Snohomish School District. All four of those districts prepared their own student generation rates in 2022 with those rates included in the adopted capital facilities plans. These averages reflect recent development trends in this area of Snohomish County. As a comparison to Snohomish County, King County has recognized that, where there is a lack of adequate development data within a district, data from adjacent districts, districts with similar demographics, or county wide averages must be used. See KCC 21A.06.1260.

The resulting average student generation rates are as follows:

| | K-5 | 6-8 | 9-12 |
|-----------------------------------|-----------------------|--------------|--------------|
| Single Family+ | 0.260 | 0.099 | 0.105 |
| Townhome/Duplex^ | 0.096 | 0.072 | 0.062 |
| Multi-Family 2+ Bedroom* | 0.096 | 0.072 | 0.062 |
| Multi-Family 1 Bdroom/less | <i>see note below</i> | | |

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 an average.

^ For Townhome/Duplex units, the District is applying the MF 2+ bedroom SGR as those units previously were included by the sample districts within the Multi-Family 2+ bedroom data set.

APPENDIX C

SCHOOL IMPACT FEE CALCULATIONS

| SCHOOL IMPACT FEE CALCULATIONS | | | | | | | | | |
|---|---------------------------------|---------------|----------|----------------|----------------|----------------|-----------------|-----------------|-----------------|
| DISTRICT | Granite Falls School District | | | | | | | | |
| YEAR | 2024 | | | | | | | | |
| School Site Acquisition Cost: | | | | | | | | | |
| ((AcresxCost per Acre)/Facility Capacity)xStudent Generation Factor | | | | | | | | | |
| | Facility | Cost/ | Facility | Student | Student | Student | Cost/ | Cost/ | Cost/ |
| | Acreage | Acre | Capacity | SFR | TH/Duplex | MFR (2+) | SFR | TH/Duplex | MFR (2+) |
| Elementary | 15.00 | \$ - | 450 | 0.260 | 0.096 | 0.096 | \$0 | \$0 | \$0 |
| Middle | 20.00 | \$ - | 600 | 0.099 | 0.072 | 0.072 | \$0 | \$0 | \$0 |
| High | 40.00 | \$ - | 256 | 0.105 | 0.062 | 0.062 | \$0 | \$0 | \$0 |
| | | | | | | TOTAL | \$0 | \$0 | \$0 |
| School Construction Cost: | | | | | | | | | |
| ((Facility Cost/Facility Capacity)xStudent Generation Factor)x(permanent/Total Sq Ft) | | | | | | | | | |
| | %Perm/ | Facility | Facility | Student | Student | Student | Cost/ | Cost/ | Cost/ |
| | Total Sq.Ft. | Cost | Capacity | SFR | TH/Duplex | MFR (2+) | SFR | TH/Duplex | MFR (2+) |
| Elementary | 97.00% | \$ 12,870,000 | 184 | 0.260 | 0.096 | 0.096 | \$17,640 | \$6,513 | \$6,513 |
| Middle | 97.00% | \$ 14,150,000 | 232 | 0.099 | 0.072 | 0.072 | \$5,857 | \$4,260 | \$4,260 |
| High | 97.00% | | 256 | 0.105 | 0.062 | 0.062 | \$0 | \$0 | \$0 |
| | | | | | | TOTAL | \$23,497 | \$10,773 | \$10,773 |
| Temporary Facility Cost: | | | | | | | | | |
| ((Facility Cost/Facility Capacity)xStudent Generation Factor)x(Temporary/Total Square Feet) | | | | | | | | | |
| | %Temp/ | Facility | Facility | Student | Student | Student | Cost/ | Cost/ | Cost/ |
| | Total Sq.Ft. | Cost | Size | SFR | TH/Duplex | MFR (2+) | SFR | TH/Duplex | MFR (2+) |
| Elementary | 3.00% | \$ - | 25 | 0.260 | 0.096 | 0.096 | \$0 | \$0 | \$0 |
| Middle | 3.00% | \$ - | 30 | 0.099 | 0.072 | 0.072 | \$0 | \$0 | \$0 |
| High | 3.00% | \$ - | 32 | 0.105 | 0.062 | 0.062 | \$0 | \$0 | \$0 |
| | | | | | | TOTAL | \$0 | \$0 | \$0 |
| State School Construction Funding Assistance Credit: | | | | | | | | | |
| CCA X SPI Square Footage X District Funding Assistance % X Student Factor | | | | | | | | | |
| | CCA | SPI | Funding | Student | Student | Student | Cost/ | Cost/ | Cost/ |
| | | Footage | Asst % | Factor | Factor | Factor | SFR | TH/Duplex | MFR (2+) |
| Elementary | \$ 375.00 | 90 | 57.08% | 0.260 | 0.096 | 0.096 | \$5,009 | \$1,849 | \$1,849 |
| Middle | \$ 375.00 | 108 | | 0.099 | 0.072 | 0.072 | \$0 | \$0 | \$0 |
| High | \$ 375.00 | 130 | 0.00% | 0.105 | 0.062 | 0.062 | \$0 | \$0 | \$0 |
| | | | | | | TOTAL | \$5,009 | \$1,849 | \$1,849 |
| Tax Payment Credit: | | | | | | | | | |
| Average Assessed Value | | | | SFR | TH/Duplex | MFR (2+) | \$535,648 | \$242,411 | \$242,411 |
| Capital Bond Interest Rate | | | | 3.48% | 3.48% | 3.48% | | | |
| Net Present Value of Average Dwelling | | | | \$4,459,267 | \$2,018,070 | \$2,018,070 | | | |
| Years Amortized | | | | 10 | 10 | 10 | | | |
| Property Tax Levy Rate | | | | \$1.29 | \$1.29 | \$1.29 | | | |
| | Present Value of Revenue Stream | | | | | | \$5,752 | \$2,603 | \$2,603 |
| Fee Summary: | | | | Single | Townhome | Multi- | | | |
| | | | | Family | Duplex | Family (2+) | | | |
| | Site Acquisition Costs | | | \$0 | \$0 | \$0 | | | |
| | Permanent Facility Cost | | | \$23,497 | \$10,773 | \$10,773 | | | |
| | Temporary Facility Cost | | | \$0 | \$0 | \$0 | | | |
| | State SCFA Credit | | | (\$5,009) | (\$1,849) | (\$1,849) | | | |
| | Tax Payment Credit | | | (\$5,752) | (\$2,603) | (\$2,603) | | | |
| | FEE (AS CALCULATED) | | | \$12,736 | \$6,320 | \$6,320 | | | |
| | Fee (AS DISCOUNTED) | | | \$6,368 | \$3,160 | \$3,160 | | | |

Inspiring Excellence



LAKE STEVENS

School District

2024 – 2029 CAPITAL FACILITIES PLAN

LAKE STEVENS SCHOOL DISTRICT NO. 4

prepared for:

Snohomish County

And

City of Lake Stevens
City of Marysville

Final
July 10, 2024

CAPITAL FACILITIES PLAN LAKE STEVENS SCHOOL DISTRICT NO. 4

BOARD OF DIRECTORS

Mari Taylor, President
David Iseminger, Vice President
Nina Kim Hanson
Vildan Kirby
Paul Lund

SUPERINTENDENT

Mary Templeton, 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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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 twenty years (2044), with a more detailed schedule and financing program for capital improvements over the next six years (2024-2029). This CFP is based in large measure on the 2024 Facilities Needs 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 Plan¹. 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 2022.

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

| Element | See Page | Table |
|---|-----------------|--------------|
| Future enrollment forecasts for each grade span (elementary, middle, mid-high and high). | 17 | 5-2 |
| An inventory of existing capital facilities owned by the District, showing the locations and student capacities of the facilities. | 12 | 4-1 |
| A forecast of the future needs for capital facilities and school sites; distinguishing between existing and projected deficiencies. | 19 20 | 6-1 6-2 |
| The proposed capacities of expanded or new capital facilities. | 22 | 6-3 |

¹ See Appendix F of this CFP

| Element | See Page | Table |
|---|------------|-------|
| 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. | 22 | 6-3 |
| A calculation of impact fees to be assessed and support data substantiating said fees. | Appendix A | |
| A report on fees collected through December 2023 and how those funds were used. | 24 | 6-4 |

In developing this CFP, the guidelines of Appendix F of the General Policy Plan² 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 FLO Analytics (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 9,423³ with seven elementary schools, two middle schools, one mid-high school, one high school and one homeschool partnership program (HomeLink).

² See Appendix G of this CFP

³ March 2024 Headcount Report

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 eighth grade. The District employs over 600 certificated staff members and over 600 classified staff for a total of over 1,200.

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 reduced class sizes at the K-3 level at all elementary schools.
- Uneven distribution of growth across the district and an imbalance in growth in the north and south ends of the district, requiring facilities to balance enrollment.
- Increased critical areas regulations, decreasing the amount of developable area on school sites.
- 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 school facilities.
- 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 2029 for K-5 of 1,249 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 2024 is \$621,496 for single-family detached residential dwellings; \$175,173 for one-bedroom (*Small*) multi-family units, and \$242,411 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 2024, a rate of 3.48% 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 “2024 Facilities Needs 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 2024 Capital Facilities Plan is \$375.00, as provided by OSPI.

*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 .00120.

*Dwelling Unit Type means (1) single-family detached residences, (2) townhomes and multiplex units (duplexes, triplexes and quadplexes) and (3) multi-family apartment or condominium units.

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

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

*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 3.48% 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 2024 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. SCC³

*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 temporary classrooms or portables) means factory-built structures, transportable in one or more sections, which are designed to be used as an education space and are needed:

- to prevent the overbuilding of school facilities,
- to meet the needs of service areas within the District, or
- to cover the gap between the time that families move into new residential developments and the date that construction is completed on permanent school facilities.

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

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

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

*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 temporary 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 District⁴. 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.

⁴ 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, 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:

- Behavioral Program
- Bilingual Program
- Career and Technical Education
- Community Education
- Conflict Resolution
- Contract-Based Learning
- Credit Retrieval
- Drug Resistance Education
- Early Learning Center, which includes ECEAP and developmental preschool
- Full-day Kindergarten
- Highly Capable
- Home School Parent Partnership (HomeLink)
- Language Assistance Program (LAP)
- Life Skills Self-Contained Program
- Multi-Age Instruction
- Multi-tiered Systems of Support
- Occupational and Physical Therapy
- Online Distance Learning
- Running Start
- Speech and Language Pathologists
- Structured Learning Center Self-Contained Program
- Summer School
- Title 1
- Title 2

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 **23** students.
- Average class size for grades 1-3 should not exceed **25** students.
- Average class size for grades 4-5 should not exceed **27** students.
- Special Education for students may be provided in a self-contained classroom. The practical capacity for these classrooms is **12** students.
- All students will be provided music instruction in a separate classroom.
- Optimum design capacity for new elementary schools is 650 students. However, the actual capacity of individual schools may vary depending on the educational programs offered.

Educational Program Standards for Middle, Mid-High and High Schools

- Class size for secondary grade (6-12) regular classrooms should not exceed **30** students.
- 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 2,000 students. The 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 27 or fewer students in a majority of K-5 classrooms, the standards have been met; if there are 30 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 Meeting MLOS | Total Classrooms | % Meeting MEPS |
|------------------|-------------------------|------------------|----------------|
| Total Elementary | 180 | 186 | 97% |
| Total Secondary | 188 | 196 | 96% |
| District Total | 368 | 382 | 96% |

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-8 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 | 50,513 | 22 | 2 | 474 | 599 | 1992 | Yes |
| Highland Elementary | 8.7 | 53,725 | 20 | 2 | 440 | 590 | 1999 | Yes |
| Hillcrest Elementary | 15.0 | 55,571 | 22 | | 484 | 779 | 2008 | Yes |
| Mt. Pilchuck Elementary | 22.0 | 55,282 | 22 | 2 | 490 | 565 | 2008 | Yes |
| Skyline Elementary | 15.0 | 52,417 | 19 | 4 | 439 | 539 | 1992 | Yes |
| Stevens Creek Elementary | 20.0 | 83,244 | 26 | 2 | 574 | 624 | 2018 | Yes |
| Sunnycrest Elementary | 15.0 | 50,592 | 24 | | 519 | 619 | 2009 | Yes |
| Elementary Total | 104.7 | 401,344 | 155 | 12 | 3,420 | 4,315 | | |
| Middle Schools | | | | | | | | |
| Lake Stevens Middle School | 25.0 | 86,206 | 26 | 5 | 637 | 829 | 1996 | Yes |
| North Lake Middle School | 15.0 | 91,516 | 34 | 2 | 787 | 887 | 2001 | Yes |
| Middle School Total | 40.0 | 177,722 | 60 | 7 | 1,424 | 1,716 | | |
| Mid-High | | | | | | | | |
| Cavelero Mid-High School | 37.0 | 225,612 | 62 | 8 | 1,484 | 1,529 | 2007 | Yes |
| Mid-High Total | 37.0 | 225,612 | 62 | 8 | 1,484 | 1,529 | | |
| High Schools | | | | | | | | |
| Lake Stevens High School | 38.0 | 312,598 | 86 | 6 | 1,997 | 1,997 | 2021 | Yes |
| High School Total | 38.0 | 312,598 | 86 | 6 | 1,997 | 1,997 | | |
| District Totals | 219.7 | 1,117,276 | 363 | 33 | 8,325 | 9,557 | | |

*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 temporary 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 92 portable classrooms at various school sites throughout the District to provide temporary capacity for K-12 students. This compares with 75 portables used in 2020. A typical portable classroom can provide capacity for a full-size class of students. Current use of portables throughout the District is summarized in Table 4-2.

Table 4-2 – Portables

| School Name | Portable Classrooms | Capacity in Portables | Remaining Useful Life | Portable Area (ft ²) |
|----------------------------------|---------------------|-----------------------|-----------------------|----------------------------------|
| <u>ELEMENTARY SCHOOLS</u> | | | | |
| Glenwood | 10 | 125 | Good/excellent | 8,960 |
| Highland | 10 | 150 | Good | 8,960 |
| Hillcrest | 21 | 295 | Good/excellent | 18,816 |
| Mt. Pilchuck | 9 | 75 | Good | 8,064 |
| Skyline | 11 | 100 | Good/excellent | 9,856 |
| Stevens Creek | 2 | 50 | Excellent | 1,792 |
| Sunnycrest | 7 | 100 | Good | 6,272 |
| Elementary Total | 70 | 895 | | 62,720 |
| <u>MIDDLE SCHOOLS</u> | | | | |
| Lake Stevens Middle | 11 | 192 | Good | 9,856 |
| North Lake Middle | 9 | 100 | Good | 8,064 |
| Middle Schools Total | 20 | 292 | | 17,920 |
| <u>MID-HIGH SCHOOL</u> | | | | |
| Cavelero Mid-High | 2 | 45 | Excellent | 1,792 |
| Mid-High Total | 2 | 45 | | 1,792 |
| <u>HIGH SCHOOL</u> | | | | |
| Lake Stevens High School | 0 | 0 | | 0 |
| High School Total | 0 | 0 | | 0 |
| District K-12 Total | 92 | 1,232 | | 82,432 |

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 | 14,771 |
| Grounds | 1.0 | 2,788 |
| Maintenance | 1.0 | 5,724 |
| Transportation | 6.0 | 15,589 |
| Support Facility Total | 9.4 | 38,872 |

Land Inventory

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

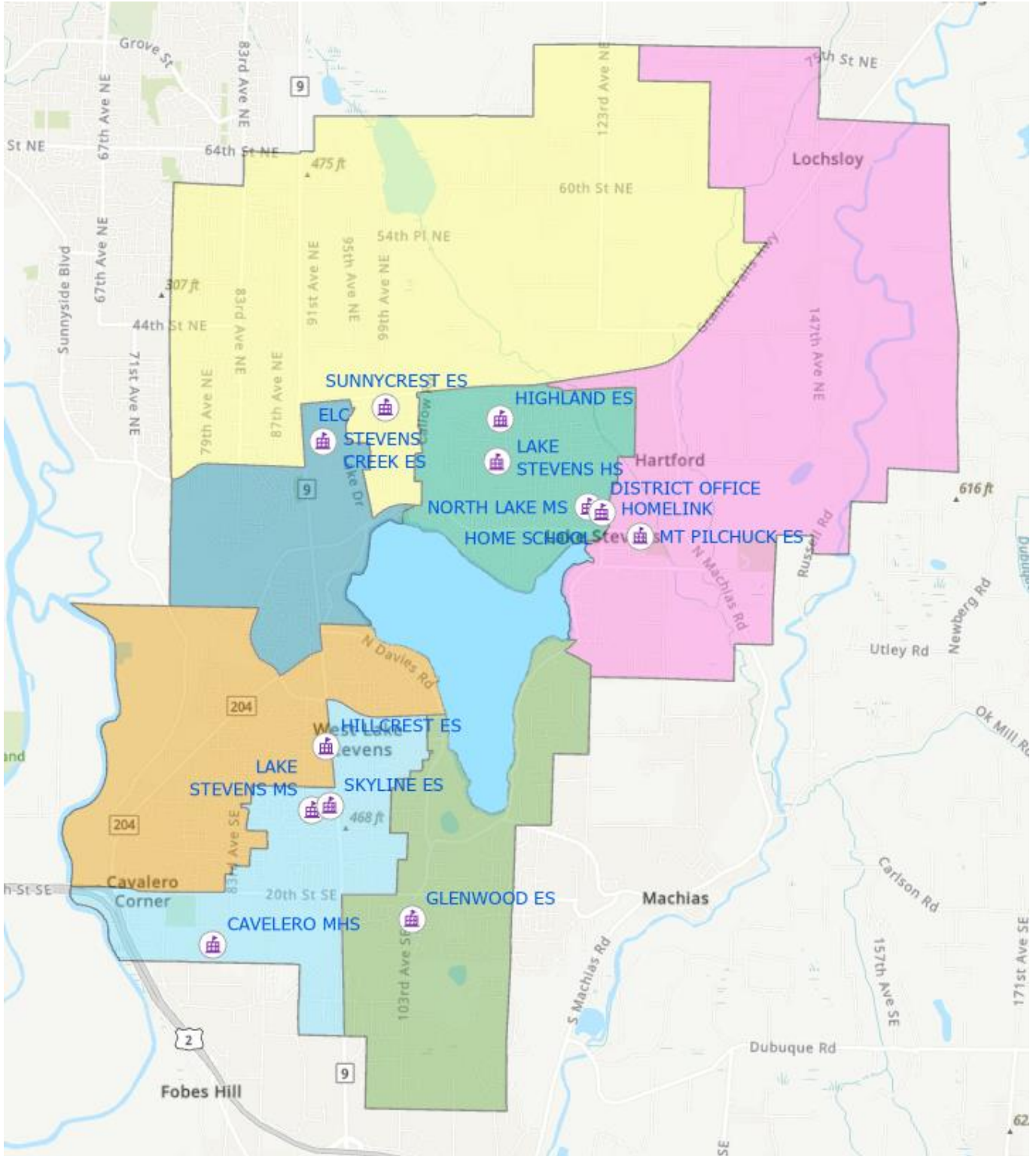
Ten acres located in the northeast area of the District (Lochsloy area), west of Highway 92. This site will eventually be used for an elementary school (beyond the year 2029). It is presently used as an auxiliary sports field.

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 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 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

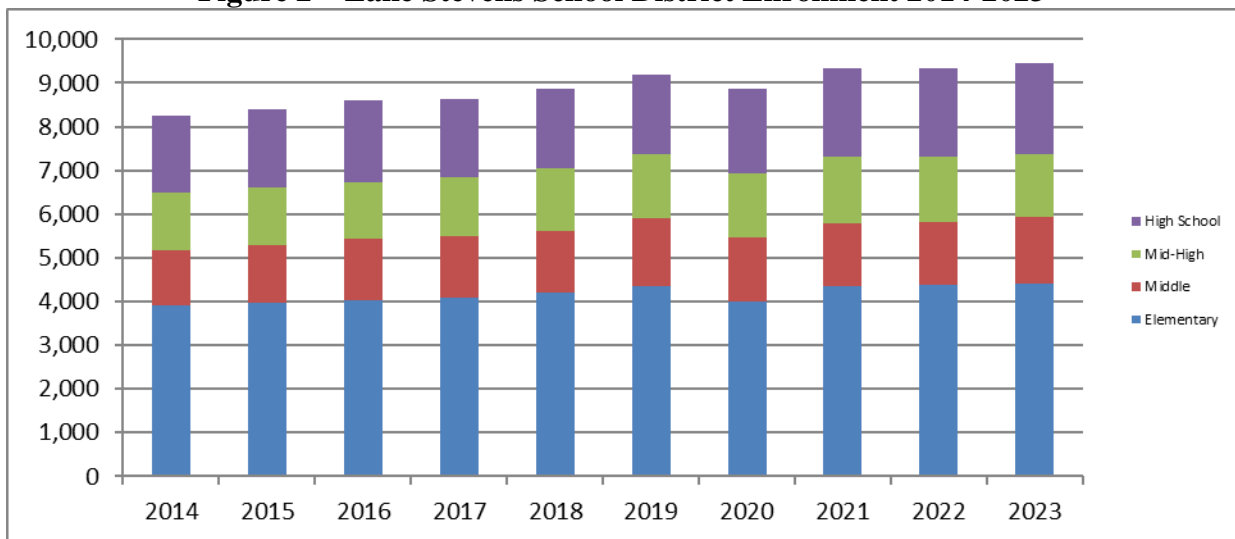


SECTION 5: STUDENT ENROLLMENT TRENDS AND PROJECTIONS

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 2014 and 2023, student enrollment increased by 1,193 students, over 14%. 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 50,461 in 2020 to almost 67,294 in Year 2044, an increase of 33%.

Figure 2 – Lake Stevens School District Enrollment 2014-2023



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 is an essential yearly activity 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 2014 to 2023 according to OSPI and District records.

Table 5-1 - Enrollment 2014-2023

| | 2014 | 2015 | 2016 | 2017 | 2018 | 2019 | 2020 | 2021 | 2022 | 2023 |
|--------------------|--------------|--------------|--------------|--------------|--------------|--------------|--------------|--------------|--------------|--------------|
| Elementary | 3,917 | 3,971 | 4,030 | 4,083 | 4,207 | 4,362 | 3,998 | 4,354 | 4,372 | 4,397 |
| Middle | 1,261 | 1,314 | 1,398 | 1,405 | 1,414 | 1,556 | 1,468 | 1,426 | 1,450 | 1,527 |
| Mid-High | 1,318 | 1,331 | 1,312 | 1,344 | 1,426 | 1,448 | 1,476 | 1,524 | 1,497 | 1,447 |
| High School | 1,757 | 1,776 | 1,871 | 1,814 | 1,828 | 1,834 | 1,912 | 2,021 | 2,020 | 2,075 |
| Total | 8,253 | 8,392 | 8,611 | 8,646 | 8,875 | 9,200 | 8,854 | 9,325 | 9,339 | 9,446 |

Note that the District’s enrollment dropped by 346 students (3.8%) in 2020. In 2020, education was mostly held remotely due to the COVID-19 pandemic, and many districts experienced enrollment

declines. Unlike many districts, however, enrollment in Lake Stevens bounced back up by 471 students (5.3%) in 2021 and enrollment has continued to grow since.

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 2010-2023, the average percentage was 18.46%. For future planning, a level rate of 17.41% was used through 2029 and for Year 2044. These assumptions recognize a trend toward lower household sizes offset by significant growth anticipated in the Lake Stevens area. OSPI methodology uses a modified cohort survival method which is explained in Appendix B.

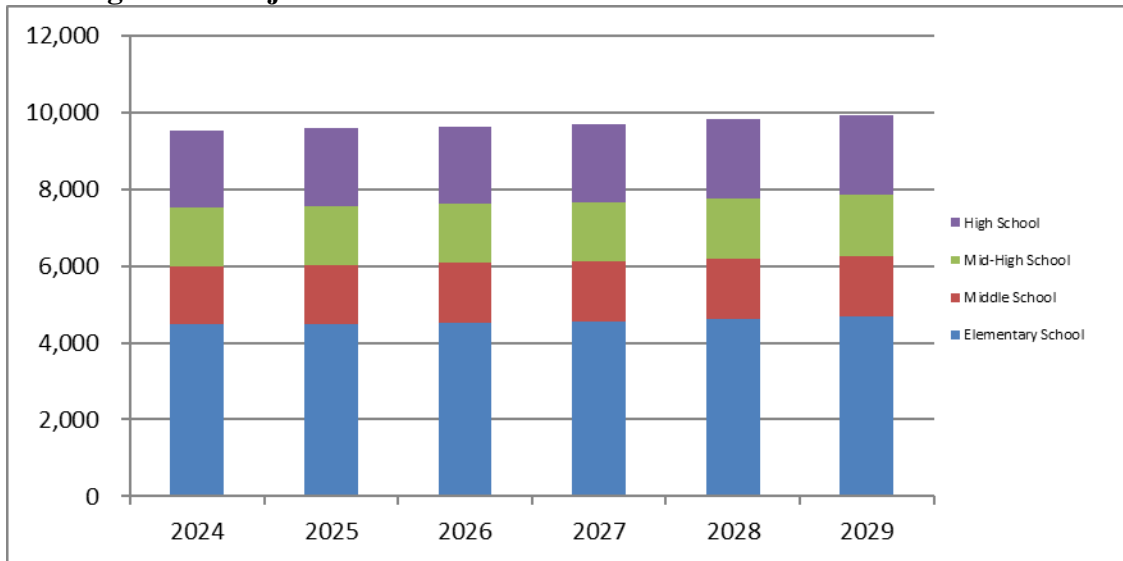
Ratio Method estimates are found in Table 5-2. These have been adopted as part of this Capital Facilities Plan.

Table 5-2 - Projected Enrollment 2024-2029

| | 2023* | 2024 | 2025 | 2026 | 2027 | 2028 | 2029 |
|-------------------|--------------|--------------|--------------|--------------|--------------|--------------|--------------|
| Elementary School | 4,397 | 4,469 | 4,499 | 4,528 | 4,557 | 4,613 | 4,669 |
| Middle School | 1,527 | 1,521 | 1,531 | 1,541 | 1,551 | 1,570 | 1,589 |
| Mid-High School | 1,447 | 1,521 | 1,531 | 1,541 | 1,551 | 1,570 | 1,589 |
| High School | 2,075 | 1,997 | 2,010 | 2,023 | 2,036 | 2,061 | 2,086 |
| Total | 9,446 | 9,508 | 9,571 | 9,633 | 9,695 | 9,814 | 9,933 |

*October 2023 Headcount

Figure 3 - Projected Lake Stevens School District Enrollment 2024-2029



In summary, the Ratio Method estimates that headcount enrollment will total 9,933 students in 2029. This represents a 5.2% increase over 2023. The District accepts the Ratio Method estimate for its 2024 CFP planning.

2044 Enrollment Projection

The District projects a 2044 student enrollment of 11,716 based on the Ratio method. (OSPI does not

forecast enrollments beyond 2029). The forecast is based on the County’s OFM-based population forecast of 67,294 in the District. Although student enrollment projections beyond 2029 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 2044 Enrollment

| Grade Span | Projected 2044 FTE Student Enrollment |
|------------------------------|--|
| Elementary (K-5) | 5,467 |
| Middle (6-7) | 1,883 |
| Mid-High (8-9) | 1,878 |
| High (10-12) | 2,488 |
| District Total (K-12) | 11,716 |

The 2044 estimate represents a 24% increase over 2023 enrollment levels. The total population in the Lake Stevens School District is forecasted to rise by 24%. 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 2044 estimates are highly speculative and are used only for general planning purposes. Analysis of future facilities 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 (2023) has 977 unhoused students at the elementary level, 103 unhoused students at the middle school level and 78 unhoused students at the high school level. It has excess capacity (37) at the mid-high school.

Facility Needs (2024-2029)

Projected available student capacity was derived by subtracting projected student enrollment from 2023 permanent school capacity (excluding portables) for each of the six years in the forecast period (2024-2029). 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 2029 the District would be over capacity at the elementary level by 1,249 students, 165 students at the middle school level, 105 students at the mid-high school and 89 students at the high school.

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 2021 must be deducted from the total projected deficiencies before impact fees are assessed.

Table 6-1 - Projected Additional Capacity Needs 2024 – 2029

| Grade Span | 2023 * | 2024 | 2025 | 2026 | 2027 | 2028 | 2029 |
|----------------------------|--------|---------|---------|---------|---------|---------|---------|
| Elementary (K-5) | | | | | | | |
| Permanent capacity | 3,420 | 3,420 | 3,420 | 3,420 | 3,420 | 3,420 | 3,420 |
| Enrollment | 4,397 | 4,469 | 4,498 | 4,528 | 4,557 | 4,613 | 4,669 |
| Capacity Surplus/(Deficit) | (977) | (1,049) | (1,078) | (1,108) | (1,137) | (1,193) | (1,249) |
| Growth Related | | (72) | (101) | (131) | (160) | (216) | (272) |
| Middle School (6-7) | | | | | | | |
| Permanent capacity | 1,424 | 1,424 | 1,424 | 1,424 | 1,424 | 1,424 | 1,424 |
| Enrollment | 1,527 | 1,521 | 1,531 | 1,541 | 1,551 | 1,570 | 1,589 |
| Capacity Surplus/(Deficit) | (103) | (97) | (107) | (117) | (127) | (146) | (165) |
| Growth Related | | 0 | (4) | (14) | (24) | (43) | (62) |
| Mid-High (8-9) | | | | | | | |
| Permanent capacity | 1,484 | 1,484 | 1,484 | 1,484 | 1,484 | 1,484 | 1,484 |
| Enrollment | 1,447 | 1,521 | 1,531 | 1,541 | 1,551 | 1,570 | 1,589 |
| Capacity Surplus/(Deficit) | 37 | (37) | (47) | (57) | (67) | (86) | (105) |
| Growth Related | | (74) | (84) | (94) | (104) | (123) | (142) |
| High School (10-12) | | | | | | | |
| Permanent capacity | 1,997 | 1,997 | 1,997 | 1,997 | 1,997 | 1,997 | 1,997 |
| Enrollment | 2,075 | 1,997 | 2,010 | 2,023 | 2,036 | 2,061 | 2,086 |
| Capacity Surplus/(Deficit) | (78) | 0 | (13) | (26) | (39) | (64) | (89) |
| Growth Related | | 0 | 0 | 0 | 0 | 0 | (11) |

* October 2023 enrollment

Figures assume no capital improvements.

Forecast of Future Facility Needs through 2044

Additional elementary, middle, mid-high and high school classroom space will need to be constructed between 2022 and 2044 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 (2027), additional permanent student capacity will be needed as follows:

Table 6-2 –Additional Capacity Need 2029 & 2044

| Grade Level | 2024 Capacity | 2029 Enrollment | 2029 Additional Capacity Needed | 2044 Enrollment | 2044 Additional Capacity Needed |
|--------------------|----------------------|------------------------|--|------------------------|--|
| Elementary | 3,420 | 4,669 | 1,249 | 5,467 | 2,047 |
| Middle School | 1,424 | 1,589 | 165 | 1,883 | 459 |
| Mid-High | 1,484 | 1,589 | 105 | 1,878 | 394 |
| High School | 1,997 | 2,086 | 89 | 2,488 | 491 |
| Total | 8,325 | 9,933 | 1,608 | 11,716 | 3,391 |

Planned Improvements (2024-2029)

The following is a brief outline of those projects likely needed to accommodate unhoused students in the Lake Stevens School District through the Year 2029 based on OSPI enrollment projections.

Elementary Schools: Based upon current enrollment estimates, elementary student population will increase to the level of requiring two new elementary schools. The CFP reflects acquisition of land for two schools and the construction of one new elementary and expansion of two existing elementaries in 2026 and 2027, although the exact timing is unknown at this time.

Middle Schools: Based upon current enrollment estimates, middle school student population will increase to the level of requiring an expansion of an existing middle school. The CFP reflects the expansion of a middle school in 2027, 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 2024-2029. 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 – 2024-2029 Capital Facilities Plan

| Estimated Project Cost by Year (In \$Millions) | 2024 | 2025 | 2026 | 2027 | 2028 | 2029 | Total | Local Cost* | State Match |
|---|------|---------|----------|----------|------|------|----------|----------------|----------------|
| Improvements Adding Student Capacity | | | | | | | | | |
| Elementary | | | | | | | | | |
| Site Acquisition | | | | | | | | | |
| Acres | | | | 20 | | | 20 | | |
| Purchase Cost | | | | \$ 4.00 | | | \$ 4.00 | \$ 4.00 | \$ - |
| Capacity Addition | | | | 1300 | | | 1300 | | |
| Relocatable Facilities Cost | | | | | | | \$ - | \$ - | |
| Capacity Addition | | | | | | | 0 | | |
| Construction Cost | | | \$148.90 | \$ 70.70 | | | \$219.60 | \$187.10 | \$32.50 |
| Capacity Addition | | | 850 | 125 | | | 975 | | |
| Middle | | | | | | | | | |
| Site Acquisition | | | | | | | | | |
| Acres | | | | | | | - | | |
| Purchase Cost | | | | | | | \$ - | \$ - | \$ - |
| Capacity Addition | | | | | | | - | | |
| Relocatable Facilities Cost | | \$ 0.25 | \$ 0.25 | | | | \$ 0.50 | \$ 0.50 | \$ - |
| Capacity Addition | | 50 | 50 | | | | 100 | | |
| Construction Cost | | | | \$ 98.80 | | | \$ 98.80 | \$ 71.50 | \$27.30 |
| Capacity Addition | | | | 200 | | | 200 | | |
| Mid-High | | | | | | | | | |
| Site Acquisition | | | | | | | | | |
| Acres | | | | | | | - | | |
| Purchase Cost | | | | | | | \$ - | \$ - | \$ - |
| Capacity Addition | | | | | | | - | | |
| Relocatable Facilities Cost | | \$ 0.25 | | \$ 0.50 | | | \$ 0.75 | \$ 0.75 | \$ - |
| Capacity Addition | | 50 | | 100 | | | 150 | | |
| Construction Cost | | | | | | | \$ - | \$ - | \$ - |
| Capacity Addition | | | | | | | - | | |
| High School | | | | | | | | | |
| Site Acquisition | | | | | | | | | |
| Acres | | | | | | | - | | |
| Purchase Cost | | | | | | | \$ - | \$ - | \$ - |
| Capacity Addition | | | | | | | - | | |
| Relocatable Facilities Cost | | | | | | | \$ - | \$ - | \$ - |
| Capacity Addition | | | | | | | 0 | | |
| Construction Cost | | | | \$ 27.70 | | | \$ 27.70 | \$ 27.70 | \$ - |
| Capacity Addition | | | | 200 | | | 200 | | |
| Student Capacity Total Cost | \$- | \$ - | \$ 148.9 | \$ 201.2 | \$- | \$- | \$ 350.1 | \$ 290.3 | \$ 59.8 |
| Improvements Not Adding Student Capacity | | | | | | | | | |
| Elementary | | | | | | | | | |
| Construction Cost | | | | | | | \$ - | \$ - | \$ - |
| Middle | | | | | | | | | |
| Construction Cost | | | | | | | \$ - | \$ - | \$ - |
| Mid-High | | | | | | | | | |
| Construction Cost | | | | | | | \$ - | \$ - | \$ - |
| High School | | | | | | | | | |
| Construction Cost | | | | | | | \$ - | \$ - | \$ - |
| District-wide Improvements | | | | | | | | | |
| Construction Cost | | \$13.30 | \$ 7.40 | \$ 7.00 | | | \$ 27.70 | \$ 27.70 | \$ - |
| Non-Student Capacity Total Cost | \$- | \$13.30 | \$ 7.40 | \$ 7.00 | \$- | \$- | \$ 27.70 | \$ 27.70 | \$ - |
| Elementary (including land acquisition) | \$- | \$ - | \$148.90 | \$ 74.70 | \$- | \$- | \$223.60 | \$191.10 | \$32.50 |
| Middle | \$- | \$ 0.25 | \$ 0.25 | \$ 98.80 | \$- | \$- | \$ 99.30 | \$ 72.00 | \$27.30 |
| Mid-High | \$- | \$ 0.25 | \$ - | \$ 0.50 | \$- | \$- | \$ 0.75 | \$ 0.75 | \$ - |
| High School | \$- | \$ - | \$ - | \$ 27.70 | \$- | \$- | \$ 27.70 | \$ 27.70 | \$ - |
| District Wide | \$- | \$13.30 | \$ 7.40 | \$ 7.00 | \$- | \$- | \$ 27.70 | \$ 27.70 | \$ - |
| Annual Total | \$- | \$13.80 | \$156.55 | \$208.70 | \$- | \$- | \$379.05 | \$319.25 | \$59.80 |

*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 the 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 5.5% per year has been applied out to 2029.

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 30% of the actual cost of school construction in state matching funds. For its 2024 CFP, the District assumes a 30% 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

| Year | Revenue | Expenditure |
|--------------|---------------------|---------------------|
| 2023 | \$ 2,782,209 | \$ 1,889,623 |
| 2022 | \$ 3,007,540 | \$ 2,204,707 |
| 2021 | \$ 3,855,167 | \$ 4,334,823 |
| 2020 | \$ 4,438,497 | \$ 5,235,528 |
| 2019 | \$ 4,483,964 | \$ 4,177,428 |
| 2018 | \$ 1,760,609 | \$ 4,076,918 |
| 2016 | \$ 1,595,840 | \$ 1,872,014 |
| 2014 | \$ 698,188 | \$ 1,389,784 |
| 2013 | \$ 1,005,470 | \$ 22,304 |
| 2012 | \$ 1,526,561 | \$ - |
| Total | \$25,154,045 | \$25,203,129 |

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 permanent capacity impacts of the proposed capital construction projects. This does not take into consideration temporary facilities for the reasons stated earlier.

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

| 2023 | Elementary | Middle | Mid-High | High School |
|--------------------------------------|-------------------|---------------|-----------------|--------------------|
| Existing Capacity | 3,420 | 1,424 | 1,484 | 1,997 |
| Programmed Improvement Capacity | | | | |
| Capacity After Improvement | 3,420 | 1,424 | 1,484 | 1,997 |
| Current Enrollment | 4,397 | 1,527 | 1,447 | 2,075 |
| Surplus (Deficit) After Improvement | (977) | (103) | 37 | (78) |
| 2024 | Elementary | Middle | Mid-High | High School |
| Existing Capacity | 3,420 | 1,424 | 1,484 | 1,997 |
| Programmed Improvement Capacity | 0 | 0 | 0 | 0 |
| Capacity After Improvement | 3,420 | 1,424 | 1,484 | 1,997 |
| Projected Enrollment | 4,469 | 1,521 | 1,521 | 1,997 |
| Surplus (Deficit) After Improvement | (1,049) | (97) | (37) | 0 |
| 2025 | Elementary | Middle | Mid-High | High School |
| Existing Capacity | 3,420 | 1,424 | 1,484 | 1,997 |
| Programmed Improvement Capacity | 0 | 0 | 0 | 0 |
| Capacity After Improvement | 3,420 | 1,424 | 1,484 | 1,997 |
| Projected Enrollment | 4,498 | 1,531 | 1,531 | 2,010 |
| Surplus (Deficit) After Improvement | (1,078) | (107) | (47) | (13) |
| 2026 | Elementary | Middle | Mid-High | High School |
| Existing Capacity | 3,420 | 1,424 | 1,484 | 1,997 |
| Programmed Improvement Capacity | 850 | 200 | 0 | 0 |
| Capacity After Improvement | 4,270 | 1,624 | 1,484 | 1,997 |
| Projected Enrollment | 4,528 | 1,541 | 1,541 | 2,023 |
| Surplus (Deficit) After Improvement | (258) | 83 | (57) | (26) |
| 2027 | Elementary | Middle | Mid-High | High School |
| Existing Capacity | 4,270 | 1,624 | 1,484 | 1,997 |
| Programmed Improvement Capacity | 125 | 0 | 0 | 200 |
| Capacity After Improvement | 4,395 | 1,624 | 1,484 | 2,197 |
| Projected Enrollment | 4,557 | 1,551 | 1,551 | 2,036 |
| Surplus (Deficit) After Improvement* | (162) | 73 | (67) | 161 |
| 2028 | Elementary | Middle | Mid-High | High School |
| Existing Capacity | 4,395 | 1,624 | 1,484 | 2,197 |
| Programmed Improvement Capacity | 0 | 0 | 0 | 0 |
| Capacity After Improvement | 4,395 | 1,624 | 1,484 | 2,197 |
| Projected Enrollment | 4,613 | 1,570 | 1,570 | 2,061 |
| Surplus (Deficit) After Improvement* | (218) | 54 | (86) | 136 |
| 2029 | Elementary | Middle | Mid-High | High School |
| Existing Capacity | 4,395 | 1,624 | 1,484 | 2,197 |
| Programmed Improvement Capacity | 0 | 0 | 0 | 0 |
| Capacity After Improvement | 4,395 | 1,624 | 1,484 | 2,197 |
| Projected Enrollment | 4,669 | 1,589 | 1,589 | 2,086 |
| Surplus (Deficit) After Improvement | (274) | 35 | (105) | 111 |

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, 2024 - 2029. As noted previously, the District will need to acquire two additional elementary school sites between 2024 and 2029.

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 650 students, new middle schools 750 students and new high schools 2,000 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 townhomes/multiplexes and multifamily apartment and condominium 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. FLO Analytics 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

| 2024 | | | | | |
|----------------------------|------------|--------|----------|-------|-------|
| Student Generation Rates | Elementary | Middle | Mid-High | High | Total |
| Single Family Detached | 0.370 | 0.110 | 0.090 | 0.117 | 0.687 |
| Townhome/Multiplex (2,3,4) | 0.086 | 0.025 | 0.012 | 0.018 | 0.141 |
| Multifamily, 0-1 bedroom | 0.000 | 0.000 | 0.000 | 0.000 | 0.000 |
| Multifamily, 2+ bedroom | 0.035 | 0.015 | 0.004 | 0.027 | 0.081 |

| 2022 | | | | | |
|------------------------------|------------|--------|----------|-------|-------|
| Student Generation Rates | Elementary | Middle | Mid-High | High | Total |
| Single Family | 0.348 | 0.091 | 0.090 | 0.101 | 0.630 |
| Multiple Family, 0-1 Bedroom | 0.000 | 0.000 | 0.000 | 0.000 | 0.000 |
| Multiple Family, 2+ Bedroom | 0.092 | 0.031 | 0.000 | 0.023 | 0.146 |

Note: Townhomes were included in the Multifamily 2+ category prior to 2024.

The table also shows the Student Generation rates from the 2022 CFP. Per the report from FLO Analytics: “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." After several years of decline in the student generation rates, the 2024 report shows an increase in most grade levels for most housing types.

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 2023) 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 2029: 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, which 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: 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 \$375.00 (July 2024) up from \$246.83 in 2022.

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.

Because of the method of computing state match, the District has historically received approximately 30% of the actual cost of school construction in state matching funds. For its 2024 CFP, the District assumes a 30% match.

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 3.48%.

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 0.00120.

Average Assessed Value: This figure is based on the District’s average assessed value for each type of dwelling unit (single-family and multiple family). The average assessed values are based on estimates made by the County’s Planning and Development Services Department utilizing information from the Assessor’s files. The current average assessed value for 2024 for single-family detached residential dwellings is \$621,496, up from \$485,760 in 2020 and \$423,231 in 2020); \$175,173 for one-bedroom multi-family unit (\$169,461 in 2022; \$125,314 in 2020), and \$242,411 for townhomes/multi-plexes and two or more bedroom multi-family units (2022: \$239,226; 2020: \$178,051).

6. Adjustments

Growth Related Capacity Percentage: Only the portions of projects addressing new unhoused need are included in the impact fee calculations. The percentage is determined by the number of new unhoused students divided by the number of students for which the project would provide additional capacity.

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

| Criteria | Elementary | Middle | Mid-High | High |
|---|-------------------|-----------------|-----------------|--------------|
| Growth-Related Capacity Deficiencies | 272 | 62 | 142 | 11 |
| Discount (Snohomish County, Lake Stevens and Marysville) | 50% | 50% | 50% | 50% |
| Student Factor | Elementary | Middle | Mid-High | High |
| Single Family Detached | 0.370 | 0.110 | 0.090 | 0.117 |
| Townhome/Multiplex | 0.086 | 0.025 | 0.012 | 0.018 |
| Multifamily, 0-1 bedrooms | 0.000 | 0.000 | 0.000 | 0.000 |
| Multifamily, 2+ bedrooms | 0.035 | 0.015 | 0.004 | 0.027 |
| Site Acquisition Cost Element | Elementary | Middle | Mid-High | High |
| Site Needs (acres) | 20 | 0 | 0 | 0 |
| Growth Related | 4.18 | 0 | 0 | 0 |
| Cost Per Acre | \$200,000.00 | \$200,000.00 | \$200,000.00 | \$200,000.00 |
| Additional Capacity | 1300 | 0 | 0 | 0 |
| Growth Related | 272 | 62 | 142 | 11 |
| School Construction Cost Element | Elementary | Middle | Mid-High | High |
| Estimated Facility Construction Cost | \$219,600,000 | \$98,800,000 | \$0 | \$27,700,000 |
| Growth Related | \$61,262,769 | \$30,628,000 | \$0 | \$1,523,500 |
| Additional Capacity | 975 | 200 | 0 | 200 |
| Growth Related | 272 | 62 | 142 | 11 |
| Current Facility Square Footage | 401,344 | 177,722 | 225,612 | 312,598 |
| Relocatable Facilities Cost Element | Elementary | Middle | Mid-High | High |
| Relocatable Facilities Cost | \$250,000 | \$250,000 | \$250,000 | \$250,000 |
| Growth Related | \$250,000 | \$250,000 | \$250,000 | \$250,000 |
| Relocatable Facilities Capacity/Unit | 25 | 27 | 27 | 27 |
| Growth Related | 25 | 27 | 27 | 27 |
| Existing Portable Square Footage | 62,720 | 17,920 | 1,792 | 0 |
| State Match Credit | Elementary | Middle | Mid-High | High |
| Cost Construction Allocation | \$375.00 | \$375.00 | \$375.00 | \$375.00 |
| School Space per Student (OSPI) | 90 | 117 | 117 | 130 |
| State Match Percentage | 30.0% | 30.0% | 30.0% | 30.0% |
| Tax Payment Credit | Elementary | Middle | Mid-High | High |
| Interest Rate | 3.48% | 3.48% | 3.48% | 3.48% |
| Loan Payoff (Years) | 10 | 10 | 10 | 10 |
| Property Tax Levy Rate (Bonds) | 0.00120 | 0.00120 | 0.00120 | 0.00120 |
| Average AV per DU Type | SFD | Small MF | Large MF | |
| | \$621,496 | \$175,173 | \$242,411 | |
| | | "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

| Housing Type | Impact Fee Per Unit | Discounted (50%) Impact Fee Per Unit |
|--------------------------|---------------------|--------------------------------------|
| Single Family Detached | \$27,460 | \$13,730 |
| Townhome/Multiplex | \$5,253 | \$2,627 |
| Multifamily, 0-1 bedroom | \$0 | \$0 |
| Multifamily, 2+ bedrooms | \$1,481 | \$741 |

Appendix A

Impact Fee Calculations

IMPACT FEE WORKSHEET
 LAKE STEVENS SCHOOL DISTRICT
SINGLE-FAMILY DETACHED

SITE ACQUISITION COST

| | | | | | | | | | | | | | |
|--------------|-------------|---|----|----------------|---|-----------------------|--------------|---|----------------|--------------|---|--------------|---------------|
| acres needed | <u>4.18</u> | x | \$ | <u>200,000</u> | / | capacity (# students) | <u>1,300</u> | x | student factor | <u>0.370</u> | = | <u>\$238</u> | (elementary) |
| acres needed | <u>0.00</u> | x | \$ | <u>200,000</u> | / | capacity (# students) | <u>0</u> | x | student factor | <u>0.110</u> | = | <u>\$0</u> | (middle) |
| acres needed | <u>0.00</u> | x | \$ | <u>200,000</u> | / | capacity (# students) | <u>0</u> | x | student factor | <u>0.090</u> | = | <u>\$0</u> | (mid-high) |
| acres needed | <u>0.00</u> | x | \$ | <u>200,000</u> | / | capacity (# students) | <u>0</u> | x | student factor | <u>0.117</u> | = | <u>\$0</u> | (high school) |

TOTAL SITE ACQUISITION COST = \$238

SCHOOL CONSTRUCTION COST

| | | | | | | | | | | |
|-------------------|---------------------|---|-----------------------|------------|---|----------------|--------------|---|-----------------|---------------|
| total const. cost | <u>\$61,262,769</u> | / | capacity (# students) | <u>975</u> | x | student factor | <u>0.370</u> | = | <u>\$23,248</u> | (elementary) |
| total const. cost | <u>\$30,628,000</u> | / | capacity (# students) | <u>200</u> | x | student factor | <u>0.110</u> | = | <u>\$16,845</u> | (middle) |
| total const. cost | <u>\$0</u> | / | capacity (# students) | <u>0</u> | x | student factor | <u>0.090</u> | = | <u>\$0</u> | (mid-high) |
| total const. cost | <u>\$1,523,500</u> | / | capacity (# students) | <u>200</u> | x | student factor | <u>0.117</u> | = | <u>\$891</u> | (high school) |

Subtotal \$40,985

Total Square Feet of Permanent Space (District) 1,117,276 / Total Square Feet of School Facilities (000) 1,199,708 = 93.13%

TOTAL FACILITY CONSTRUCTION COST = \$38,169

RELOCATABLE FACILITIES COST (PORTABLES)

| | | | | | | | | | | |
|---------------|-------------------|---|-----------|---------------|---|----------------|--------------|---|----------------|---------------|
| Portable Cost | <u>\$ 250,000</u> | / | <u>25</u> | facility size | x | student factor | <u>0.370</u> | = | <u>\$3,700</u> | (elementary) |
| Portable Cost | <u>\$ 250,000</u> | / | <u>27</u> | facility size | x | student factor | <u>0.110</u> | = | <u>\$1,019</u> | (middle) |
| Portable Cost | <u>\$ 250,000</u> | / | <u>27</u> | facility size | x | student factor | <u>0.090</u> | = | <u>\$833</u> | (mid-high) |
| Portable Cost | <u>\$ 250,000</u> | / | <u>27</u> | facility size | x | student factor | <u>0.117</u> | = | <u>\$1,083</u> | (high school) |

Subtotal \$6,635

Total Square Feet of Portable Space (District) 82,432 / Total Square Feet of School Facilities (000) 1,199,708 = 6.87%

TOTAL RELOCATABLE COST ELEMENT = \$456

CREDIT AGAINST COST CALCULATION -- MANDATORY

STATE MATCH CREDIT

| | | | | | | | | | | | | |
|--------------------------|--------------|------------------|--------|---|---------------|--------|---|----------------|-------|---|---------|---------------|
| CCA Index | \$ 375.00 | x OSPI Allowance | 90.00 | x | State Match % | 30.00% | x | student factor | 0.370 | = | \$3,746 | (elementary) |
| CCA Index | \$ 375.00 | x OSPI Allowance | 117.00 | x | State Match % | 30.00% | x | student factor | 0.110 | = | \$1,448 | (middle) |
| CCA Index | No projects | x OSPI Allowance | 117.00 | x | State Match % | 30.00% | x | student factor | 0.090 | = | \$0 | (mid-high) |
| CCA Index | Not eligible | x OSPI Allowance | 130.00 | x | State Match % | 30.00% | x | student factor | 0.117 | = | \$0 | (high school) |
| TOTAL STATE MATCH CREDIT | | | | | | | | | | = | \$5,194 | |

TAX PAYMENT CREDIT

$$\begin{aligned}
 & \left[\left(1 + \text{interest rate } \underline{3.48\%} \right)^{10} - 1 \right] / \left[\text{interest rate } \underline{3.48\%} \right] \times \\
 & \left(1 + \text{interest rate } \underline{3.48\%} \right)^{10} - 1 \text{ years to pay off bond } \times \underline{0.00120} \text{ capital levy rate } \times \\
 & \text{assessed value } \underline{621,496.00} \text{ tax payment credit} = \$ 6,209
 \end{aligned}$$

IMPACT FEE CALCULATION

| | |
|---|-----------|
| SITE ACQUISITION COST | \$238 |
| FACILITY CONSTRUCTION COST | \$38,169 |
| RELOCATABLE FACILITIES COST (PORTABLES) | \$456 |
| (LESS STATE MATCH CREDIT) | (\$5,194) |
| (LESS TAX PAYMENT CREDIT) | (\$6,209) |
| | |
| | |

| | | |
|----------------------------------|-----------------|-----------------|
| | Non-Discounted | 50% Discount |
| SINGLE FAMILY RESIDENTIAL | | |
| FINAL IMPACT FEE PER UNIT | \$27,460 | \$13,730 |

IMPACT FEE WORKSHEET
LAKE STEVENS SCHOOL DISTRICT

TOWNHOMES AND MULTIPLEXES

SITE ACQUISITION COST

| | | | | | | | | | | |
|--------------|-------------|---|------------------------------------|-------------|---|----------------|--------------|---|-------------|---------------|
| acres needed | <u>4.18</u> | x | \$ 200,000 / capacity (# students) | <u>1300</u> | x | student factor | <u>0.086</u> | = | <u>\$55</u> | (elementary) |
| acres needed | <u>0</u> | x | \$ 200,000 / capacity (# students) | <u>0</u> | x | student factor | <u>0.025</u> | = | <u>\$0</u> | (middle) |
| acres needed | <u>0</u> | x | \$ 200,000 / capacity (# students) | <u>0</u> | x | student factor | <u>0.012</u> | = | <u>\$0</u> | (mid-high) |
| acres needed | <u>0</u> | x | \$ 200,000 / capacity (# students) | <u>0</u> | x | student factor | <u>0.018</u> | = | <u>\$0</u> | (high school) |

TOTAL SITE ACQUISITION COST = \$55

SCHOOL CONSTRUCTION COST

| | | | | | | | | | | |
|-------------------|---------------------|---|-----------------------|------------|---|----------------|--------------|---|----------------|---------------|
| total const. cost | <u>\$61,262,769</u> | / | capacity (# students) | <u>975</u> | x | student factor | <u>0.086</u> | = | <u>\$5,404</u> | (elementary) |
| total const. cost | <u>\$30,628,000</u> | / | capacity (# students) | <u>200</u> | x | student factor | <u>0.025</u> | = | <u>\$3,829</u> | (middle) |
| total const. cost | <u>\$0</u> | / | capacity (# students) | <u>0</u> | x | student factor | <u>0.012</u> | = | <u>\$0</u> | (mid-high) |
| total const. cost | <u>\$1,523,500</u> | / | capacity (# students) | <u>200</u> | x | student factor | <u>0.018</u> | = | <u>\$137</u> | (high school) |

Subtotal \$9,369

Total Square Feet of Permanent Space (District) 1,117,276 / Total Square Feet of School Facilities (000) 1,199,708 = 93.13%

TOTAL FACILITY CONSTRUCTION COST = \$ 8,726

RELOCATABLE FACILITIES COST (PORTABLES)

| | | | | | | | | | | |
|---------------|-------------------|---|-----------|---------------|---|----------------|--------------|---|--------------|---------------|
| Portable Cost | <u>\$ 250,000</u> | / | <u>25</u> | facility size | x | student factor | <u>0.086</u> | = | <u>\$860</u> | (elementary) |
| Portable Cost | <u>\$ 250,000</u> | / | <u>27</u> | facility size | x | student factor | <u>0.025</u> | = | <u>\$231</u> | (middle) |
| Portable Cost | <u>\$ 250,000</u> | / | <u>27</u> | facility size | x | student factor | <u>0.012</u> | = | <u>\$111</u> | (mid-high) |
| Portable Cost | <u>\$ 250,000</u> | / | <u>27</u> | facility size | x | student factor | <u>0.018</u> | = | <u>\$167</u> | (high school) |

Subtotal \$1,369

Total Square Feet of Portable Space (District) 82,432 / Total Square Feet of School Facilities (000) 1,199,708 = 6.87%

TOTAL RELOCATABLE COST ELEMENT = \$94

CREDIT AGAINST COST CALCULATION -- MANDATORY

STATE MATCH CREDIT

| | | | | | | | | | | | |
|--------------------------|---------------------|------------------|------------|---|---------------|---------------|------------------|--------------|---|--------------|----------------|
| BOECKH Index | <u>\$ 375.00</u> | x OSPI Allowance | <u>90</u> | x | State Match % | <u>30.00%</u> | x student factor | <u>0.086</u> | = | <u>\$871</u> | (elementary) |
| BOECKH Index | <u>\$ 375.00</u> | x OSPI Allowance | <u>117</u> | x | State Match % | <u>30.00%</u> | x student factor | <u>0.025</u> | = | <u>\$329</u> | (middle) |
| BOECKH Index | <u>No projects</u> | x OSPI Allowance | <u>117</u> | x | State Match % | <u>30.00%</u> | x student factor | <u>0.012</u> | = | <u>\$0</u> | (mid-high) |
| BOECKH Index | <u>Not eligible</u> | x OSPI Allowance | <u>130</u> | x | State Match % | <u>30.00%</u> | x student factor | <u>0.018</u> | = | <u>\$0</u> | (high school) |
| TOTAL STATE MATCH CREDIT | | | | | | | | | | = | <u>\$1,200</u> |

TAX PAYMENT CREDIT

$$\begin{aligned}
 & \left[\left(1 + \text{interest rate } \underline{3.48\%} \right)^{10} - 1 \right] / \left[\text{interest rate } \underline{3.48\%} \right] \times \\
 & \left(1 + \text{interest rate } \underline{3.48\%} \right)^{10} - 1 \text{ years to pay off bond } \times \underline{0.0012} \text{ capital levy rate} \times \\
 & \text{assessed value } \underline{242,411.00} \text{ tax payment credit} = \$ (2,422)
 \end{aligned}$$

IMPACT FEE CALCULATION

| | |
|---|-----------------------------|
| SITE ACQUISITION COST | <u>\$55</u> |
| FACILITY CONSTRUCTION COST | <u>\$8,726</u> |
| RELOCATABLE FACILITIES COST (PORTABLES) | <u>\$94</u> |
| (LESS STATE MATCH CREDIT) | <u>(\$1,200)</u> |
| (LESS TAX PAYMENT CREDIT) | <u>(\$2,422)</u> |
| | <u> </u> |
| | <u> </u> |

| | | |
|-----------------------------------|----------------|----------------|
| TOWNHOMES AND MULTI-PLEXES | Non-Discounted | 50% Discount |
| FINAL IMPACT FEE PER UNIT | \$5,253 | \$2,627 |

IMPACT FEE WORKSHEET
LAKE STEVENS SCHOOL DISTRICT

MULTIPLE FAMILY RESIDENTIAL, 0-1 BEDROOMS

SITE ACQUISITION COST

| | | | | | | | | | | | | |
|--------------|-------------|---|-------------------|---|-----------------------|-------------|---|----------------|--------------|---|------------|---------------|
| acres needed | <u>4.18</u> | x | <u>\$ 200,000</u> | / | capacity (# students) | <u>1300</u> | x | student factor | <u>0.000</u> | = | <u>\$0</u> | (elementary) |
| acres needed | <u>0</u> | x | <u>\$ 200,000</u> | / | capacity (# students) | <u>0</u> | x | student factor | <u>0.000</u> | = | <u>\$0</u> | (middle) |
| acres needed | <u>0</u> | x | <u>\$ 200,000</u> | / | capacity (# students) | <u>0</u> | x | student factor | <u>0.000</u> | = | <u>\$0</u> | (mid-high) |
| acres needed | <u>0</u> | x | <u>\$ 200,000</u> | / | capacity (# students) | <u>0</u> | x | student factor | <u>0.000</u> | = | <u>\$0</u> | (high school) |

TOTAL SITE ACQUISITION COST = \$0

SCHOOL CONSTRUCTION COST

| | | | | | | | | | | |
|-------------------|---------------------|---|-----------------------|------------|---|----------------|--------------|---|------------|---------------|
| total const. cost | <u>\$61,262,769</u> | / | capacity (# students) | <u>975</u> | x | student factor | <u>0.000</u> | = | <u>\$0</u> | (elementary) |
| total const. cost | <u>\$30,628,000</u> | / | capacity (# students) | <u>200</u> | x | student factor | <u>0.000</u> | = | <u>\$0</u> | (middle) |
| total const. cost | <u>\$0</u> | / | capacity (# students) | <u>0</u> | x | student factor | <u>0.000</u> | = | <u>\$0</u> | (mid-high) |
| total const. Cost | <u>\$1,523,500</u> | / | capacity (# students) | <u>200</u> | x | student factor | <u>0.000</u> | = | <u>\$0</u> | (high school) |

\$0

Total Square Feet of Permanent Space (District) 1,117,276 / Total Square Feet of School Facilities (000) 1,199,708 = 93.13%

TOTAL FACILITY CONSTRUCTION COST = \$ -

RELOCATABLE FACILITIES COST (PORTABLES)

| | | | | | | | | | | |
|---------------|-------------------|---|-----------|---------------|---|----------------|--------------|---|------------|---------------|
| Portable Cost | <u>\$ 250,000</u> | / | <u>25</u> | facility size | x | student factor | <u>0.000</u> | = | <u>\$0</u> | (elementary) |
| Portable Cost | <u>\$ 250,000</u> | / | <u>27</u> | facility size | x | student factor | <u>0.000</u> | = | <u>\$0</u> | (middle) |
| Portable Cost | <u>\$ 250,000</u> | / | <u>27</u> | facility size | x | student factor | <u>0.000</u> | = | <u>\$0</u> | (mid-high) |
| Portable Cost | <u>\$ 250,000</u> | / | <u>27</u> | facility size | x | student factor | <u>0.000</u> | = | <u>\$0</u> | (high school) |

Subtotal \$0

Total Square Feet of Portable Space (District) 82,432 / Total Square Feet of School Facilities (000) 1,199,708 = 6.87%

TOTAL RELOCATABLE COST ELEMENT = \$0

CREDIT AGAINST COST CALCULATION -- MANDATORY

STATE MATCH CREDIT

| | | | | | | | | | | | |
|--------------------------|---------------------|------------------|------------|---|---------------|---------------|------------------|--------------|---|------------|---------------|
| BOECKH Index | <u>\$ 375.00</u> | x OSPI Allowance | <u>90</u> | x | State Match % | <u>30.00%</u> | x student factor | <u>0.000</u> | = | <u>\$0</u> | (elementary) |
| BOECKH Index | <u>\$ 375.00</u> | x OSPI Allowance | <u>117</u> | x | State Match % | <u>30.00%</u> | x student factor | <u>0.000</u> | = | <u>\$0</u> | (middle) |
| BOECKH Index | <u>No projects</u> | x OSPI Allowance | <u>117</u> | x | State Match % | <u>30.00%</u> | x student factor | <u>0.000</u> | = | <u>\$0</u> | (mid-high) |
| BOECKH Index | <u>Not eligible</u> | x OSPI Allowance | <u>130</u> | x | State Match % | <u>30.00%</u> | x student factor | <u>0.000</u> | = | <u>\$0</u> | (high school) |
| TOTAL STATE MATCH CREDIT | | | | | | | | | | = | <u>\$0</u> |

TAX PAYMENT CREDIT

$$\begin{aligned}
 & \left[\left(1 + \text{interest rate } \underline{3.48\%} \right)^{10} - 1 \right] / \left[\text{interest rate } \underline{3.48\%} \right] \times \\
 & \left(1 + \text{interest rate } \underline{3.48\%} \right)^{10} - 1 \text{ years to pay off bond } \times \underline{0.00120} \text{ capital levy rate} \times \\
 & \text{assessed value } \underline{175,173.00} \text{ tax payment credit} = \$ 1,750
 \end{aligned}$$

IMPACT FEE CALCULATION

| | |
|---|-----------------------------|
| SITE ACQUISITION COST | <u>\$0</u> |
| FACILITY CONSTRUCTION COST | <u>\$0</u> |
| RELOCATABLE FACILITIES COST (PORTABLES) | <u>\$0</u> |
| (LESS STATE MATCH CREDIT) | <u>\$0</u> |
| (LESS TAX PAYMENT CREDIT) | <u>(\$1,750)</u> |
| | <u> </u> |

| | | |
|--|----------------|--------------|
| MULTIPLE FAMILY RESIDENTIAL -- 0-1 BDRM FINAL IMPACT FEE PER UNIT | Non-Discounted | 50% Discount |
| | \$0 | \$0 |

IMPACT FEE WORKSHEET
LAKE STEVENS SCHOOL DISTRICT

MULTIPLE FAMILY RESIDENTIAL, 2+ BEDROOMS

SITE ACQUISITION COST

| | | | | | | | | | | |
|--------------|-------------|---|------------------------------------|-------------|---|----------------|--------------|---|-------------|---------------|
| acres needed | <u>4.18</u> | x | \$ 200,000 / capacity (# students) | <u>1300</u> | x | student factor | <u>0.035</u> | = | <u>\$23</u> | (elementary) |
| acres needed | <u>0</u> | x | \$ 200,000 / capacity (# students) | <u>0</u> | x | student factor | <u>0.015</u> | = | <u>\$0</u> | (middle) |
| acres needed | <u>0</u> | x | \$ 200,000 / capacity (# students) | <u>0</u> | x | student factor | <u>0.004</u> | = | <u>\$0</u> | (mid-high) |
| acres needed | <u>0</u> | x | \$ 200,000 / capacity (# students) | <u>0</u> | x | student factor | <u>0.027</u> | = | <u>\$0</u> | (high school) |

TOTAL SITE ACQUISITION COST = \$23

SCHOOL CONSTRUCTION COST

| | | | | | | | | | | |
|-------------------|---------------------|---|-----------------------|------------|---|----------------|--------------|---|----------------|---------------|
| total const. cost | <u>\$61,262,769</u> | / | capacity (# students) | <u>975</u> | x | student factor | <u>0.035</u> | = | <u>\$2,199</u> | (elementary) |
| total const. cost | <u>\$30,628,000</u> | / | capacity (# students) | <u>200</u> | x | student factor | <u>0.015</u> | = | <u>\$2,297</u> | (middle) |
| total const. cost | <u>\$0</u> | / | capacity (# students) | <u>0</u> | x | student factor | <u>0.004</u> | = | <u>\$0</u> | (mid-high) |
| total const. Cost | <u>\$1,523,500</u> | / | capacity (# students) | <u>200</u> | x | student factor | <u>0.027</u> | = | <u>\$206</u> | (high school) |

\$4,702

Total Square Feet of Permanent Space (District) 1,117,276 / Total Square Feet of School Facilities (000) 1,199,708 = 93.13%

TOTAL FACILITY CONSTRUCTION COST = \$ 4,379

RELOCATABLE FACILITIES COST (PORTABLES)

| | | | | | | | | | | |
|---------------|-------------------|---|-----------|---------------|---|----------------|--------------|---|--------------|---------------|
| Portable Cost | <u>\$ 250,000</u> | / | <u>25</u> | facility size | x | student factor | <u>0.035</u> | = | <u>\$350</u> | (elementary) |
| Portable Cost | <u>\$ 250,000</u> | / | <u>27</u> | facility size | x | student factor | <u>0.015</u> | = | <u>\$139</u> | (middle) |
| Portable Cost | <u>\$ 250,000</u> | / | <u>27</u> | facility size | x | student factor | <u>0.004</u> | = | <u>\$37</u> | (mid-high) |
| Portable Cost | <u>\$ 250,000</u> | / | <u>27</u> | facility size | x | student factor | <u>0.027</u> | = | <u>\$250</u> | (high school) |

Subtotal \$776

Total Square Feet of Portable Space (District) 82,432 / Total Square Feet of School Facilities (000) 1,199,708 = 6.87%

TOTAL RELOCATABLE COST ELEMENT = \$53

CREDIT AGAINST COST CALCULATION -- MANDATORY

STATE MATCH CREDIT

| | | | | | | | | | | | |
|--------------------------|---------------------|------------------|------------|---|---------------|---------------|------------------|--------------|---|--------------|---------------|
| BOECKH Index | <u>\$ 375.00</u> | x OSPI Allowance | <u>90</u> | x | State Match % | <u>30.00%</u> | x student factor | <u>0.035</u> | = | <u>\$354</u> | (elementary) |
| BOECKH Index | <u>\$ 375.00</u> | x OSPI Allowance | <u>117</u> | x | State Match % | <u>30.00%</u> | x student factor | <u>0.015</u> | = | <u>\$197</u> | (middle) |
| BOECKH Index | <u>No projects</u> | x OSPI Allowance | <u>117</u> | x | State Match % | <u>30.00%</u> | x student factor | <u>0.004</u> | = | <u>\$0</u> | (mid-high) |
| BOECKH Index | <u>Not eligible</u> | x OSPI Allowance | <u>130</u> | x | State Match % | <u>30.00%</u> | x student factor | <u>0.027</u> | = | <u>\$0</u> | (high school) |
| TOTAL STATE MATCH CREDIT | | | | | | | | | | = | <u>\$552</u> |

TAX PAYMENT CREDIT

$$\begin{aligned}
 & \left[\left(1 + \text{interest rate } \underline{3.48\%} \right)^{10} - 1 \right] / \left[\text{interest rate } \underline{3.48\%} \right] \times \\
 & \left(1 + \text{interest rate } \underline{3.48\%} \right)^{10} - 1 \text{ years to pay off bond } \times \underline{0.00120} \text{ capital levy rate} : \\
 & \text{assessed value } \underline{242,411.00} \text{ tax payment credit} = \$ \text{ 2,422}
 \end{aligned}$$

IMPACT FEE CALCULATION

| | |
|---|-----------------------------|
| SITE ACQUISITION COST | <u>\$23</u> |
| FACILITY CONSTRUCTION COST | <u>\$4,379</u> |
| RELOCATABLE FACILITIES COST (PORTABLES) | <u>\$53</u> |
| (LESS STATE MATCH CREDIT) | <u>(\$552)</u> |
| (LESS TAX PAYMENT CREDIT) | <u>(\$2,422)</u> |
| | <u> </u> |

| | | |
|--|----------------|--------------|
| MULTIPLE FAMILY RESIDENTIAL -- 2 BDRM OR MORE FINAL IMPACT FEE PER UNIT | Non-Discounted | 50% Discount |
| | \$1,481 | \$741 |

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".
4. 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.
5. 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.

Table C-1
LAKE STEVENS SCHOOL DISTRICT
STUDENT ENROLLMENT BY GRADE SPAN 2023-2029

| School Type | Grade Level | School Year | | | | | | |
|-------------------|------------------------|-------------|-------------|-------------|-------------|-------------|-------------|-------------|
| | | 2023 | 2024 | 2025 | 2026 | 2027 | 2028 | 2029 |
| Elementary | K | 672 | 686 | 683 | 680 | 677 | 674 | 671 |
| | 1 | 722 | 696 | 710 | 707 | 704 | 701 | 698 |
| | 2 | 826 | 736 | 710 | 724 | 721 | 718 | 715 |
| | 3 | 727 | 840 | 749 | 722 | 736 | 733 | 730 |
| | 4 | 699 | 741 | 856 | 763 | 736 | 750 | 747 |
| | 5 | 751 | 712 | 755 | 872 | 777 | 750 | 764 |
| | K-5 Headcount | 4397 | 4411 | 4463 | 4468 | 4351 | 4326 | 4325 |
| Middle | 6 | 768 | 767 | 728 | 772 | 891 | 794 | 766 |
| | 7 | 759 | 777 | 776 | 736 | 781 | 901 | 803 |
| | 6-7 Headcount | 1527 | 1544 | 1504 | 1508 | 1672 | 1695 | 1569 |
| Mid High | Grade 8 | 717 | 770 | 789 | 788 | 747 | 793 | 914 |
| | Grade 9 | 730 | 716 | 769 | 788 | 787 | 746 | 792 |
| | 8-9 Headcount | 1447 | 1486 | 1558 | 1576 | 1534 | 1539 | 1706 |
| Sr. High | Grade 10 | 752 | 722 | 708 | 760 | 779 | 778 | 738 |
| | Grade 11 | 685 | 694 | 666 | 653 | 701 | 719 | 718 |
| | Grade 12 | 638 | 660 | 669 | 642 | 630 | 676 | 693 |
| | 10-12 Headcount | 2075 | 2076 | 2043 | 2055 | 2110 | 2173 | 2149 |
| | K-12 Headcount | 9446 | 9517 | 9568 | 9607 | 9667 | 9733 | 9749 |

Source: Snohomish County, Lake Stevens School District and OSPI

Appendix C
OFM Ratio Method – 2044 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.

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 (2024-2029) prepared by the State Office of the Superintendent of Public Instructions (OSPI) for use in the facilities plan. Whichever is used for the 2024-2029 planning period, OSPI does not forecast enrollments for Year 2044, so the Ratio Method is used for that purpose, regardless.

| 2024 | | | |
|-------------|---------------|--------------|--------|
| Year | Population | Enrollment | Ratio |
| 2010 | 39,977 | 7,913 | 19.79% |
| 2011 | 41,025 | 7,985 | 19.46% |
| 2012 | 42,074 | 7,987 | 18.98% |
| 2013 | 43,122 | 8,126 | 18.84% |
| 2014 | 44,171 | 8,253 | 18.68% |
| 2015 | 45,219 | 8,392 | 18.56% |
| 2016 | 46,267 | 8,611 | 18.61% |
| 2017 | 47,316 | 8,646 | 18.27% |
| 2018 | 48,364 | 8,875 | 18.35% |
| 2019 | 49,413 | 9,200 | 18.62% |
| 2020 | 50,461 | 8,854 | 17.55% |
| 2021 | 52,181 | 9,325 | 17.87% |
| 2022 | 53,450 | 9,339 | 17.47% |
| 2023 | 54,256 | 9,446 | 17.41% |
| 2024 | 54,614 | 9,508 | 17.41% |
| 2025 | 54,972 | 9,571 | 17.41% |
| 2026 | 55,329 | 9,633 | 17.41% |
| 2027 | 55,687 | 9,695 | 17.41% |
| 2028 | 56,370 | 9,814 | 17.41% |
| 2029 | 57,052 | 9,933 | 17.41% |
| 2044 | 67,294 | 11,716 | 17.41% |

The table above shows actual enrollments and population estimates from 2010-2023, and their resulting ratio (the 2010 and 2020 population totals are official census figures).

Until 2015 the trend was a declining ratio of students to population. The ratio leveled off in the years 2016 through 2019. In 2020, school closures and online learning caused enrollment to drop. Then enrollment rebounded in 2021 and returned to pre-pandemic levels. The district projects that the ratio will level off for the projection period and average around 17.41%.

2044 Enrollment Estimate

The District's 2024 CFP ratio of 17.41% is used for the 2044 enrollment estimate. Using that number against the County's 2044 population estimate of 67,294 produces a projected enrollment number of 11,716 students in 2044.

Appendix D
Student Generation Rates



MEMORANDUM

To: Robb Stanton
Lake Stevens School District
12309 22nd Street NE
Lake Stevens, WA 98258

Date: April 1, 2024

Project No.: F2714.01.001

From: Alex Brasch
Senior Population Geographer

Re: 2023–24 Student Generation Rates—Lake Stevens School District

At the request of the Lake Stevens School District (LSSD/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 LSSD 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, individual grade, 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 LSSD 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.

FLO Analytics | 1-888-847-0299 | www.flo-analytics.com

R:\F2714.01 Lake Stevens School District\001_2024.04.01 SGR\LSSD 2023 SGR Memo.docx
© 2024 FLO Analytics

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 same housing information as Table 1, with the number of students and SGRs by individual grade. Table 3 includes the unit counts, number of students, and SGRs for individual MF structures.

Of the 9,053 students residing within the district, 2,031 live in the 2,957 SF detached units that were built between 2015 and 2022, while 23 live in the 163 townhomes/duplexes and 21 live in the 260 MF units built in the same period. On average, each SF detached unit yields 0.687 K–12 students, each townhome/duplex yields 0.141 K–12 students, and each MF unit yields 0.081 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 | 6–7 | 8–9 | 10–12 | K–12 | K–5 | 6–7 | 8–9 | 10–12 | K–12 |
| Single-family Detached | 2,957 | 1,095 | 325 | 265 | 346 | 2,031 | 0.370 | 0.110 | 0.090 | 0.117 | 0.687 |
| Townhome / Duplex ^(a) | 163 | 14 | 4 | 2 | 3 | 23 | 0.086 | 0.025 | 0.012 | 0.018 | 0.141 |
| Multifamily ^(b) | 260 | 9 | 4 | 1 | 7 | 21 | 0.035 | 0.015 | 0.004 | 0.027 | 0.081 |

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

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

Table 2: K–12 Students by Individual Grade per Housing Unit Built 2015–2022

| Grade | Single-family Detached | | | Townhome / Duplex ^(a) | | | Multifamily ^(b) | | |
|-------------|------------------------|--------------|--------------|----------------------------------|-----------|--------------|----------------------------|-----------|--------------|
| | Housing Units | Students | SGR | Housing Units | Students | SGR | Housing Units | Students | SGR |
| K | 2,957 | 178 | 0.060 | 163 | 2 | 0.012 | 260 | 3 | 0.012 |
| 1 | | 200 | 0.068 | | 2 | 0.012 | | 3 | 0.012 |
| 2 | | 196 | 0.066 | | 3 | 0.018 | | 1 | 0.004 |
| 3 | | 175 | 0.059 | | 2 | 0.012 | | 2 | 0.008 |
| 4 | | 163 | 0.055 | | 1 | 0.006 | | 0 | -- |
| 5 | | 183 | 0.062 | | 4 | 0.025 | | 0 | -- |
| 6 | | 177 | 0.060 | | 2 | 0.012 | | 2 | 0.008 |
| 7 | | 148 | 0.050 | | 2 | 0.012 | | 2 | 0.008 |
| 8 | | 144 | 0.049 | | 1 | 0.006 | | 1 | 0.004 |
| 9 | | 121 | 0.041 | | 1 | 0.006 | | 0 | -- |
| 10 | | 133 | 0.045 | | 2 | 0.012 | | 3 | 0.012 |
| 11 | | 105 | 0.036 | | 0 | -- | | 3 | 0.012 |
| 12 | | 108 | 0.037 | | 1 | 0.006 | | 1 | 0.004 |
| K–12 | 2,957 | 2,031 | 0.687 | 163 | 23 | 0.141 | 260 | 21 | 0.081 |

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

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

Appendix E
Board Resolution

**LAKE STEVENS SCHOOL DISTRICT NO. 4
RESOLUTION NO. 15-24
ADOPTION OF 2024-2029 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 2024-2029, 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 10th day of July 2024.

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



President







ATTEST:


Superintendent:

Appendix F

Determination of Nonsignificance

DETERMINATION OF NONSIGNIFICANCE

**Lake Stevens School District No. 4
Capital Facilities Plan 2024-2029**

DESCRIPTION OF PROPOSAL: The proposed action is the adoption of the Lake Stevens School District No. 4 Capital Facilities Plan, 2024-2029. Board adoption is scheduled to occur on July 10, 2024. This Capital Facilities Plan has been developed in accordance with the 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 enrollment projections to quantify capital facility needs for years 2024-2029.

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 22nd Street NE
Lake Stevens, WA 98258
PHONE: 425-335-1506

SIGNATURE: 

PUBLISHED: The Everett Herald – June 25, 2024

There is no administrative 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.

LAKEWOOD SCHOOL DISTRICT NO. 306

CAPITAL FACILITIES PLAN

2024-2029

Adopted: July 17, 2024

LAKEWOOD SCHOOL DISTRICT NO. 306

CAPITAL FACILITIES PLAN

2024-2029

BOARD OF DIRECTORS

CATHERINE “SANDY” GOTTS, PRESIDENT

LEAH TOCCO

DANA KRIEGER

STEVEN LARSON

DAWN TAYLOR

SUPERINTENDENT

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For information regarding the Lakewood School District Capital Facilities Plan, contact the Office of the Superintendent, Lakewood School District, 17110 16th Drive NE, Marysville, WA 98271. (Tel: (360) 652-4500)

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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 (2024-2029).

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.
- As relevant, 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” and “work with school districts to plan for the siting and improvement of school facilities.” Policy ED-11 and Policy PS-21. 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 population of 2,614 headcount students, with an FTE enrollment of 2,534 (October 1, 2023, reported OSPI enrollment). The District has three elementary schools, one middle school, and one high school.

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)

- Multilingual Education Program
- Title 1/Learning Assistance Program
- K – 5th Grade Counseling Services
- Speech and Language Therapy Services
- Early Childhood Education and Assistance Program (ECEAP)
- Developmental Preschool Program - Ages 3 to 5 (District Program)
- K – 5th Grade Special Education Resource Room Program
- K – 5th Grade Highly Capable Program
- Occupational Therapy Services
- Transitional Kindergarten Program

English Crossing Elementary School (Kindergarten through 5th Grades)

- K – 5th Grade Special Education Resource Room Program
- Multilingual Education Program
- K – 5th Grade Counseling Services
- Speech and Language Therapy Services
- Occupational Therapy Services
- Special Education Achieve Program (District Program)

- K – 5th Grade Highly Capable Program
- Title 1/Learning Assistance Program

Cougar Creek Elementary School (Kindergarten through 5th Grades)

- Multilingual Education Program
- Title 1/Learning Assistance Program
- Speech and Language Therapy Services
- Occupational Therapy Services
- K – 5th Grade Special Education Resource Room Program
- K – 5th Grade Special Education Comprehensive Skills Program (District Program)
- K – 5th Grade Counseling Services
- K – 5th Grade Highly Capable Program

Lakewood Middle School (6th through 8th Grades)

- Speech and Language Therapy Service
- 6th – 8th Grade Special Education Program
- 6th – 8th Grade Special Education Comprehensive Skills Program (District Program)
- Multilingual Education Program
- Occupational Therapy Services
- 6th – 8th Grade Achieve Program (District Program)
- 6th – 8th Grade Counseling Services
- 6th – 8th Grade Highly Capable Program
- Career and Technical Education

Lakewood High School

- 9th – 12th Grade Special Education Program
- 9th – 12th Grade Special Education Comprehensive Skills Program (District Program)
- Multilingual Education Program
- Occupational Therapy Services
- Speech and Language Therapy Services
- 9th – 12th Grade Counseling Program
- Adult Special Education Independent Living Program (District Program)
- 9th – 12th Grade Highly Capable Program
- Career and Technical Education

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 – 3rd will not exceed 19 students.
- Class size for grades 4th and 5th will not exceed 24 students.
- All students will be provided library/media services in a school library.
- Special Education for students may be provided in, inclusion, self-contained or specialized classrooms.
- All students will be provided music instruction in a separate classroom (except LES due to capacity).
- 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 27 students.
- Class size for high school grades will not exceed 29 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. Inclusion model for qualified students on IEP's.
- 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, STEM).

- 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-5 classrooms have no more than 26 students per classroom, 6-8 classrooms have no more than 28 students per classroom, and 9-12 classrooms have no more than 30 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 26 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 2021-22 and 2022-23, the District’s compliance with the MLOS was as follows (with MLOS set as applicable for those school years):

| 2021-22 School Year | | | | | | |
|---------------------|--|--|-----------------------------------|------------------------------------|---------------------------------|----------------------------------|
| LOS Standard | MINIMUM LOS# Elementary | REPORTED LOS Elementary | MINIMUM LOS Middle | REPORTED LOS Middle | MINIMUM LOS High | REPORTED LOS High |
| | 26 | 20.09 | 28 | 21.63 | 30 | 24.85 |

| 2022-23 School Year | | | | | | |
|---------------------|--|--|-----------------------------------|------------------------------------|---------------------------------|----------------------------------|
| LOS Standard | MINIMUM LOS# Elementary | REPORTED LOS Elementary | MINIMUM LOS Middle | REPORTED LOS Middle | MINIMUM LOS High | REPORTED LOS High |
| | 26 | 19.92 | 28 | 22.19 | 30 | 24.94 |

* The District determines the reported LOS 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.

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**

| Elementary School | Site Size (Acres) | Building Area (Square Feet) | Teaching Stations | Permanent Capacity | Year Built or Remodeled |
|--------------------------|--------------------------|------------------------------------|--------------------------|---------------------------|--------------------------------|
| English Crossing | * | 41,430 | 20 | 403 | 1994 |
| Cougar Creek | 10** | 44,217 | 21 | 424 | 2003 |
| Lakewood | * | 45,400 | 16 | 323 | 1958, 1997 |
| TOTAL | * | 131,047 | 57 | 1,150 | |

| Middle School | Site Size (Acres) | Building Area (Square Feet) | Teaching Stations | Permanent Capacity | Year Built or Remodeled |
|----------------------|--------------------------|------------------------------------|--------------------------|---------------------------|--------------------------------|
| Lakewood Middle | * | 79,945 | 27 | 670 | 1971, 1994, 2002, 2024 |

| High School | Site Size (Acres) | Building Area (Square Feet) | Teaching Stations | Permanent Capacity | Year Built or Remodeled |
|--------------------|--------------------------|------------------------------------|--------------------------|---------------------------|--------------------------------|
| Lakewood High | * | 169,000 | 34 | 850 | 2017 |

*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 11th 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 19 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 average size of a single relocatable classroom is approximately 896 square feet. See page 22 for total square footage by grade level. The District’s relocatable classrooms have adequate useful remaining life and are evaluated regularly.

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

| Elementary School | Relocatable Classrooms | Interim Capacity |
|--------------------------|-------------------------------|-------------------------|
| English Crossing | 2 | 40 |
| Cougar Creek | 4 | 80 |
| Lakewood | 10 | 200 |
| SUBTOTAL | 16 | 320 |

| Middle School | Relocatable Classrooms | Interim Capacity |
|----------------------|-------------------------------|-------------------------|
| Lakewood Middle | 3 | 78 |
| SUBTOTAL | 3 | 78 |

| High School | Relocatable Classrooms | Interim Capacity |
|--------------------|-------------------------------|-------------------------|
| Lakewood High | 0 | 0 |
| SUBTOTAL | 0 | 0 |

| | | |
|--------------|-----------|------------|
| TOTAL | 19 | 398 |
|--------------|-----------|------------|

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**

| Facility | Building Area (Square Feet) |
|-----------------------------|--|
| Administration | 1,384 |
| Business and Operations | 1,152 |
| Storage | 2,456 |
| Bus Garage/Maintenance Shop | 7,416 |
| 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.

E. Leased Facilities

The District leases a 900 square foot portable located in the district office compound that hosts the Teaching and Learning Department and Technology Leadership.

SECTION 4 STUDENT ENROLLMENT PROJECTIONS

The District's October 1, 2023, reported enrollment was 2,614 HC students (2,533.64 FTE). 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 2,773 students are expected to be enrolled in the District by 2029, a slight increase from the October 2023 enrollment levels. Notably, the cohort survival method is not designed to anticipate fluctuations in development patterns. This deficiency is exacerbated by enrollment anomalies that occurred as a result of the COVID pandemic, particularly in the 2020-21 school year. Historically the OFM numbers and OSPI cohort percentages are lower than the district projections. See Appendix A-1.

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. In 2023, the District's student enrollment constituted approximately 14.60% of the total population in the District. Assuming that between 2024 and 2029, the District's enrollment will continue to constitute 14.60% of the District's total population and using OFM/County data, OFM/County methodology projects a total enrollment of 2,850 students in 2029, or an approximately 9.03% increase.

The District obtained in May 2023 an updated enrollment forecast from a professional demographer, FLO Analytics. They provided a low, middle and high estimate of students using full-time equivalent (FTE) counts. Based on this analysis, and using the middle numbers, a total enrollment of 2,743 FTE students, or 209 additional students, are expected by the 2029-30 school year. This projection is an increase of approximately 8.25% over 2023 enrollment. Growth is projected at the elementary and middle school levels, with some plateau at the high school level during the six-year planning period, but picking up in the immediate years following. 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. It also considers the impacts of the pandemic on enrollment. The detailed FLO Analytics forecast report is on file with the District and a grade level analysis is included in Appendix A-2.

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

Table 4
Projected Student Enrollment (FTE)
2024-2029

| Projection | Oct. 2023* | 2024 | 2025 | 2026 | 2029 | 2028 | 2029 | Change 2024-29 | Percent Change 2024-29 |
|----------------------|-------------------|--------------|--------------|--------------|--------------|--------------|--------------|-----------------------|-------------------------------|
| OFM/County | 2,614 | 2,653 | 2,692 | 2,731 | 2,770 | 2,809 | 2,850 | 236 | 9.03% |
| OSPI Cohort** | 2,614 | 2,623 | 2,666 | 2,678 | 2,732 | 2,753 | 2,773 | 159 | 6.08% |
| District*** | 2,534 | 2,567 | 2,605 | 2,634 | 2,697 | 2,727 | 2,743 | 209 | 8.25% |

* Actual reported enrollment, October 2023 (headcount for OFM/OSPI; FTE for District)

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

***FLO Analytics using FTE; grade level projections located in Appendix A.

The District is aware of notable pending residential development within the District. Specifically, nearly 1,100 multi-family units are planned for or currently in construction within the District boundaries as well as nearly 500 single family units.

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. The District plans to watch enrollment growth closely as new development continues. Future updates to the Plan will continue to revisit enrollment projections and methodologies.

B. 2044 Enrollment Projections

Student enrollment projections beyond 2029 are highly speculative. Using OFM/County data as a base, the District projects a 2044 student HC population of 3,517. This is based on the OFM/County data using total population as related to District enrollment.

Projected enrollment by grade span for the year 2044 is provided in Table 5. Again, these estimates are highly speculative and are used only for general planning purposes.

Table 5
Projected Student Enrollment
2044

| Grade Span | HC Enrollment – October 2023 | Projected Enrollment 2044* |
|---------------------|---|-----------------------------------|
| Elementary (K-5) | 1,182 | 1,590 |
| Middle School (6-8) | 616 | 829 |
| High School (9-12) | 816 | 1,098 |
| TOTAL (K-12) | 2,614 | 3,517 |

*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.

**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 (2024-2029).

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 2023-24 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, as applicable, 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 2024-2029. Note that this chart can be misleading as it reads out growth-related capacity needs related to recent growth within the District.

**Table 6-A*
Additional Capacity Needs***
2023-2029**

| Grade Span | 2023 | 2024-25 | 2025-26 | 2026-27 | 2027-28 | 2028-29 | 2029-30 | Pct. Growth Related |
|----------------------------|-------------|----------------|----------------|----------------|----------------|----------------|----------------|----------------------------|
| Elementary (K-5) | | | | | | | | |
| Total | 32 | 18 | 20 | 76 | 92 | 103 | 115 | |
| Growth Related | 32 | -- | -- | 44 | 60 | 71 | 83 | 72% |
| Middle School (6-8) | | | | | | | | |
| Total | 0 | 0 | 0 | 0 | 0 | 0 | 8 | |
| Growth Related | -- | -- | -- | -- | -- | -- | 8 | 100% |
| High School | | | | | | | | |
| Total | 0 | 0 | 0 | 0 | 0 | 0 | 0 | |
| Growth Related | -- | -- | -- | -- | -- | -- | -- | --% |

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

**Actual October 2023 Enrollment

***Additional “Growth Related Capacity Needs” equal the “Total” for each year less “deficiencies” existing as of 2023. Existing deficiencies as of 2023 include capacity needs related to recent growth from new development through that date.

By the end of the six-year forecast period (2029), additional permanent classroom capacity will be needed as follows:

**Table 6-B
Unhoused Students**

| Grade Span | Unhoused Students /Growth Related in Parentheses) |
|------------------------------|--|
| Elementary (K-5) | 115/(83) |
| Middle School (6-8) | 8/(8) |
| High School (9-12) | -(-) |
| TOTAL UNHOUSED (K-12) | 123/(91) |

Again, any 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**

| Grade Span | 2029 Unhoused Students /Growth Related in (Parentheses) | Relocatable Capacity |
|---------------------|--|-----------------------------|
| Elementary (K-5) | 115/(83) | 320 |
| Middle School (6-8) | 8/(8) | 78 |
| High School (9-12) | -(-) | 0 |
| Total (K-12) | 123(91) | 398 |

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 2029 are included in Table 7 and more fully described in Table 8.

**Table 7
Projected Student Capacity
2024-2029**

Elementary School Surplus/Deficiency

| | Oct 2023 | 2024 | 2025 | 2026 | 2027 | 2028 | 2029 |
|--------------------------|-----------------|-------------|-------------|-------------|-------------|-------------|-------------|
| Existing Capacity | 1,150 | 1,150 | 1,150 | 1,150 | 1,150 | 1,150 | 1,150 |
| Added Permanent Capacity | | | | | | | |
| Total Permanent Capacity | 1,150 | 1,150 | 1,150 | 1,150 | 1,150 | 1,150 | 1,150 |
| Enrollment [^] | 1,182 | 1,168 | 1,170 | 1,226 | 1,242 | 1,253 | 1,265 |
| Surplus (Deficiency)** | (32) | (18) | (20) | (76) | (92) | (103) | (115) |

* Reported October 2023 FTE enrollment

** Does not include portable capacity

Middle School Surplus/Deficiency

| | Oct 2023* | 2024 | 2025 | 2026 | 2027 | 2028 | 2029 |
|--------------------------|------------------|-------------|-------------|-------------|-------------|-------------|-------------|
| Existing Capacity | 670 | 670 | 670 | 670 | 670 | 670 | 670 |
| Added Permanent Capacity | | | | | | | |
| Total Permanent Capacity | 670 | 670 | 670 | 670 | 670 | 670 | 670 |
| Enrollment | 616 | 650 | 652 | 633 | 632 | 625 | 678 |
| Surplus (Deficiency)** | 54 | 20 | 18 | 37 | 38 | 45 | (8) |

* Reported October 2023 FTE enrollment

**Does not include portable capacity.

High School Surplus/Deficiency

| | Oct 2023* | 2024 | 2025 | 2026 | 2027 | 2028 | 2029 |
|--------------------------|------------------|-------------|-------------|-------------|-------------|-------------|-------------|
| Existing Capacity | 850 | 850 | 850 | 850 | 850 | 850 | 850 |
| Added Permanent Capacity | | | | | | | |
| Total Permanent Capacity | 850 | 850 | 850 | 850 | 850 | 850 | 850 |
| Enrollment | 816 | 749 | 784 | 776 | 823 | 849 | 800 |
| Surplus (Deficiency)** | 34 | 101 | 66 | 74 | 27 | 1 | 50 |

* Reported October 2023 FTE enrollment

**Does not include portable capacity

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. In the Spring of 2020, the District added a STEM lab and two classrooms at Lakewood Middle School.

Currently, the District is assessing future capacity needs and, at the present time, anticipates adding portable capacity to address short term needs with immediate plans to add portables in the summer of 2024 in the space between Lakewood Middle School and Lakewood Elementary School in order to provide K-5 interim capacity at LES. The District is not planning for permanent capacity improvements as a part of this CFP update. However, the District is considering, based on recommendations of the 2023 Citizens’ Facility Advisory Committee, a new middle school with the existing Lakewood Middle School thereafter converted to Lakewood Elementary School to provide additional K-5 capacity. Both facilities would provide capacity to serve growth. The District is in early planning as to this recommendation. Future updates to this CFP, including a potential interim update, will identify updated plans and funding sources.

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/Temporary Capacity:

- Acquisition and siting of portable facilities to accommodate growth needs.

Non-Capacity Adding Projects:

- None planned

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. Where applicable, 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. The District does not have current plans for a future bond or capital levy proposal. Future updates to the CFP will include any proposed or in process planning.

2. State School Construction Assistance

State School Construction Assistance funds come from the Common School Construction Fund and is administered by the Office of the Superintendent of Public Instruction (OSPI). 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 OSPI 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 Program (SCAP) funds for certain projects at the 59.01% funding percentage level. The current Construction Cost Allowance, the maximum cost/square foot recognized for SCAP funding, is set in the legislature in the biennial budget and currently is \$375.00/eligible square foot. 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 2024-2029. Where applicable, potential financing components include a bond or capital levy, impact fees, and State School Construction Assistance Program 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 | 2024 | 2025 | 2026 | 2027 | 2028 | 2029 | Total Cost | Bonds/ Levy/ Other Local | State Funds | Impact Fees |
|---------------------------------|--------|------|---------|--------|--------|--------|------------|-----------------------------------|----------------|----------------|
| Elementary School | | | | | | | | | | |
| Middle School | | | | | | | | | | |
| High School | | | | | | | | | | |
| Portables (all grade levels) | \$0.50 | | \$0.50 | \$0.50 | \$0.50 | \$0.75 | \$2.750 | X | | X |
| Site Acquisition | | | \$0.775 | | | | \$0.775 | X | | X |

Improvements Not Adding Capacity (Costs in Millions)

| Project | 2024 | 2025 | 2026 | 2027 | 2028 | 2029 | Total Cost | Bonds/ Levy/ Other Local | State Funds | Impact Fees |
|---------------|------|------|------|------|------|------|------------|-----------------------------------|----------------|----------------|
| Elementary | | | | | | | | | | |
| Middle School | | | | | | | | | | |
| High School | | | | | | | | | | |
| | | | | | | | | | | |
| | | | | | | | | | | |
| | | | | | | | | | | |
| | | | | | | | | | | |
| | | | | | | | | | | |

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 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.

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, 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 of growth-related school capacity (required on-site/off-site improvements). Costs vary with each site and each facility. See Table 8, 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 did not update its student generation rates for this CFP given that it is not requesting school impact fees.

- 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 dwelling units 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, 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. When applicable, the District uses the full project costs in the fee formula when calculating school impact fees. Furthermore, impact fees will not be used to address existing deficiencies. See Table 8 for a complete identification of funding sources.

The District is not requesting school impact fees as a part of this Capital Facilities Plan update.

FACTORS FOR ESTIMATED IMPACT FEE CALCULATIONS

Student Generation Factors – Single Family

| | |
|--------------|-------------|
| Elementary | .126 |
| Middle | .079 |
| High | .063 |
| Total | .268 |

Student Generation Factors – Multi Family (1 Bdrm)

| | |
|--------------|-------------|
| Elementary | .026 |
| Middle | .000 |
| High | .000 |
| Total | .026 |

Student Generation Factors – Multi Family (2+ Bdrm)

| | |
|--------------|-------------|
| Elementary | .101 |
| Middle | .038 |
| High | .045 |
| Total | .184 |

Projected Student Capacity per Facility

N/A

Required Site Acreage per Facility

Facility Construction/Cost Average

N/A

Permanent Facility Square Footage (LSD Inventory)

| | |
|--------------|----------------|
| Elementary | 131,047 |
| Middle | 79,945 |
| High | 169,000 |
| Total | 379,992 |

Temporary Facility Square Footage (LSD Inventory)

| | |
|--------------|---------------|
| Elementary | 14,382 |
| Middle | 2,688 |
| High | 0 |
| Total | 17,070 |

Total Facility Square Footage

| | |
|--------------|----------------|
| Elementary | 145,429 |
| Middle | 82,633 |
| High | 169,000 |
| Total | 397,062 |

Average Site Cost/Acre

N/A

Temporary Facility Capacity

| | |
|----------|-----------|
| Capacity | 20/26 |
| Cost | \$250,000 |

SCAP Credit (OSPI)

| | |
|--------------------------------------|--------|
| Current Eligible Cost Percentage | 59.01% |
| Current Construction Cost Allocation | 375.00 |

District Average Assessed Value (Snohomish Co.)

| | |
|-------------------------|-----------|
| Single Family Residence | \$615,195 |
|-------------------------|-----------|

District Average Assessed Value (Snohomish Co.)

| | |
|--------------------------|-----------|
| Multi Family (1 Bedroom) | \$175,173 |
|--------------------------|-----------|

| | |
|---------------------------|-----------|
| Multi Family (2+ Bedroom) | \$242,411 |
|---------------------------|-----------|

SPI Square Footage per Student (WAC 392-343-035)

| | |
|------------|-----|
| Elementary | 90 |
| Middle | 108 |
| High | 130 |

Debt Service Tax Rate for Bonds (Snohomish Co.)

| | |
|-----------------|-----------|
| Current/\$1,000 | \$1.12394 |
|-----------------|-----------|

General Obligation Bond Interest Rate (Bond Buyer)

| | |
|--------------------------------------|-------|
| Bond Buyer Index (avg February 2024) | 3.48% |
|--------------------------------------|-------|

Developer Provided Sites/Facilities

| | |
|----------------|---|
| Value | 0 |
| Dwelling Units | 0 |

C. Proposed Lakewood School District Impact Fee Schedule

The District does not have permanent capacity projects planned as a part of the 2024 CFP. See discussion in Section 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 9
School Impact Fees
Snohomish County, City of Arlington, City of Marysville*

| Housing Type | Impact Fee Per Dwelling Unit |
|-------------------------------|-------------------------------------|
| Single Family | \$0 |
| Townhome/Duplex | \$0 |
| Multi-Family (2+ Bedroom) | \$0 |
| Multi-Family (1 Bedroom/less) | \$0 |

**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 2018-2023
PROJECTED STUDENT ENROLLMENT 2024-2029
Based on OSPI Cohort Survival* Headcount Enrollment**

| School District | Grade | 2018 Actual | 2019 Actual | 2020 Actual | 2021 Actual | 2022 Actual | 2023 Actual | Survival Percentage | 2024 Projected | 2025 Projected | 2026 Projected | 2027 Projected | 2028 Projected | 2029 Projected |
|-----------------|--------------|----------------|----------------|----------------|----------------|----------------|----------------|------------------------|-------------------|-------------------|-------------------|-------------------|-------------------|-------------------|
| Lakewood | Kindergarten | 178 | 188 | 128 | 189 | 194 | 164 | | 174 | 175 | 175 | 175 | 175 | 176 |
| Lakewood | Grade 1 | 179 | 183 | 191 | 156 | 190 | 213 | 107.31 | 176 | 187 | 188 | 188 | 188 | 188 |
| Lakewood | Grade 2 | 190 | 177 | 172 | 209 | 156 | 196 | 101.08 | 215 | 178 | 189 | 190 | 190 | 190 |
| Lakewood | Grade 3 | 166 | 194 | 184 | 188 | 209 | 174 | 105.37 | 207 | 227 | 188 | 199 | 200 | 200 |
| Lakewood | Grade 4 | 175 | 179 | 189 | 195 | 203 | 206 | 103.55 | 180 | 214 | 235 | 195 | 206 | 207 |
| Lakewood | Grade 5 | 223 | 173 | 181 | 208 | 184 | 229 | 103.43 | 213 | 186 | 221 | 243 | 202 | 213 |
| Lakewood | Grade 6 | 186 | 235 | 176 | 194 | 222 | 193 | 105.18 | 241 | 224 | 196 | 232 | 256 | 212 |
| Lakewood | Grade 7 | 206 | 204 | 232 | 173 | 207 | 211 | 101.68 | 196 | 245 | 228 | 199 | 236 | 260 |
| Lakewood | Grade 8 | 185 | 213 | 216 | 217 | 170 | 212 | 100.69 | 212 | 197 | 247 | 230 | 200 | 238 |
| Lakewood | Grade 9 | 217 | 192 | 229 | 216 | 230 | 186 | 105.33 | 223 | 223 | 208 | 260 | 242 | 211 |
| Lakewood | Grade 10 | 171 | 220 | 182 | 224 | 208 | 227 | 97.79 | 182 | 218 | 218 | 203 | 254 | 237 |
| Lakewood | Grade 11 | 203 | 174 | 208 | 188 | 226 | 190 | 98.36 | 223 | 179 | 214 | 214 | 200 | 250 |
| Lakewood | Grade 12 | 157 | 182 | 159 | 217 | 184 | 213 | 95.49 | 181 | 213 | 171 | 204 | 204 | 191 |
| Lakewood | Total | 2,436 | 2,514 | 2,447 | 2,574 | 2,583 | 2,614 | | 2,623 | 2,666 | 2,678 | 2,732 | 2,753 | 2,773 |

Source: OSPI Form 1049 (printed Feb. 2024)

Table A-2

**PROJECTED ENROLLMENT BY GRADE SPAN
(DISTRICT - FLO Analytics)****

Figure 16: Enrollment (FTE) Forecasts by Individual Grade: Middle Scenario

| Grade | 2022-23 | 2023-24 | 2024-25 | 2025-26 | 2026-27 | 2027-28 | 2028-29 | 2029-30 | 2030-31 | 2031-32 | 2032-33 |
|--------------|----------------|----------------|----------------|----------------|----------------|----------------|----------------|----------------|----------------|----------------|----------------|
| K | 191.21 | 193.44 | 191.01 | 197.95 | 202.11 | 201.39 | 202.41 | 204.21 | 206.02 | 207.82 | 209.62 |
| 1 | 188.54 | 195.95 | 198.23 | 195.75 | 202.85 | 207.12 | 206.38 | 207.43 | 209.28 | 211.12 | 212.97 |
| 2 | 155.00 | 194.66 | 201.33 | 202.69 | 200.15 | 207.41 | 211.77 | 211.02 | 212.09 | 213.98 | 215.87 |
| 3 | 207.73 | 158.95 | 198.65 | 205.45 | 206.84 | 204.24 | 211.66 | 216.10 | 215.34 | 216.43 | 218.36 |
| 4 | 203.00 | 214.60 | 164.20 | 203.23 | 210.19 | 211.61 | 208.95 | 216.54 | 221.09 | 220.31 | 221.42 |
| 5 | 184.94 | 203.31 | 214.92 | 164.45 | 203.54 | 210.51 | 211.93 | 209.27 | 216.87 | 221.42 | 220.64 |
| 6 | 221.69 | 193.94 | 213.20 | 225.39 | 172.45 | 213.44 | 220.76 | 222.24 | 219.46 | 227.42 | 232.20 |
| 7 | 205.67 | 229.24 | 200.55 | 220.47 | 233.06 | 178.33 | 220.71 | 228.28 | 229.81 | 226.93 | 235.17 |
| 8 | 168.02 | 211.79 | 236.06 | 206.51 | 227.03 | 240.00 | 183.63 | 227.28 | 235.07 | 236.65 | 233.68 |
| 9 | 228.17 | 172.69 | 217.67 | 242.62 | 212.25 | 233.33 | 246.66 | 188.73 | 233.59 | 241.60 | 243.22 |
| 10 | 207.20 | 226.23 | 171.21 | 215.82 | 240.55 | 210.44 | 231.34 | 244.56 | 187.13 | 231.60 | 239.54 |
| 11 | 204.03 | 185.65 | 202.69 | 153.40 | 193.37 | 215.53 | 188.55 | 207.28 | 219.12 | 167.66 | 207.51 |
| 12 | 148.41 | 172.85 | 157.27 | 171.71 | 129.96 | 163.81 | 182.59 | 159.73 | 175.60 | 185.63 | 142.03 |
| K-5 | 1,130.42 | 1,160.91 | 1,168.35 | 1,169.51 | 1,225.67 | 1,242.28 | 1,253.10 | 1,264.57 | 1,280.68 | 1,291.08 | 1,298.88 |
| 6-8 | 595.38 | 634.97 | 649.81 | 652.37 | 632.54 | 631.77 | 625.10 | 677.80 | 684.34 | 691.01 | 701.05 |
| 9-12 | <u>787.81</u> | <u>757.40</u> | <u>748.85</u> | <u>783.55</u> | <u>776.12</u> | <u>823.11</u> | <u>849.14</u> | <u>800.30</u> | <u>815.43</u> | <u>826.49</u> | <u>832.31</u> |
| Total | 2,513.61 | 2,553.28 | 2,567.02 | 2,605.43 | 2,634.34 | 2,697.16 | 2,727.35 | 2,742.68 | 2,780.45 | 2,808.57 | 2,832.24 |

Lakewood School District October 2022-23 enrollment and FLO 2023-24 to 2032-33 enrollment forecasts (middle, or preferred, scenario). Enrollment values omit students enrolled in Transitional Kindergarten and full-time Running Start.

APPENDIX B

STUDENT GENERATION FACTOR REVIEW



MEMORANDUM

To: John Poolman
Executive Director of Finance
Lakewood School District

Date: April 4, 2022

From: Tyler Vick
Managing Director

Project No.: F1867.01.004

Benjamin Maloney
Demographer/Data Analyst

Re: Student Generation Report— Lakewood School District

At the request of the Lakewood School District (District/LSD), FLO Analytics (FLO) has prepared an analysis of the student generation rates (SGRs) as a result of recent single-family and multifamily construction (2017–2021) within the district. This document details the methodology FLO used to create the SGRs for LSD; an analysis of recent single-family (SF) and multifamily (MF) construction; and SGRs for SF, 0–1 bedroom (BR) MF units, and 2+ BR MF units. The findings are presented per individual grade and per grade group.

METHODS

The SGR analysis is based on two data sources: (1) January 2017 to December 2021 residential developments from the Snohomish County Assessor’s Office (SCAO) and (2) October 2021 student enrollment provided by the District. The residential development data include information regarding the building size, room count, assessed value, and year built, along with a significant amount of other structural information. Data that contained incomplete records (e.g., no stated location) or did not coincide with a remote visual inspection (i.e., Google Earth) were removed from the final database prior to the calculations. Senior housing was also not included in the analysis. Additional investigation into the residential data from the SCAO necessitated the removal of three residential construction developments that were erroneously listed as having been completed between 2017 and 2021. These consisted of three mobile home sites that have been present since at least 2010. The final data were then joined to Snohomish County tax parcels to provide a spatial understanding of recent residential construction trends.

According to data obtained from the SCAO, residential construction activity has continued at a brisk pace with 127 SF units and 6 MF buildings completed between 2017 and 2021 (SF). While the majority of the SF construction consisted of units classified as “Single Family Residence – Detached” (115 units), other SF use codes were also constructed, including construction classified as 2 Single Family Residences (two detached residences per parcel) and manufactured homes (owned and leased). MF development ranged from 15–20 unit residences to 301+ unit construction. About 87 percent (734 units) of these new MF units were 2+ BR units, while the remainder (114 units) were 0–1 BR units. While considered MF buildings, Cedar Pointe Apartments (Senior Facility) and Holman Recovery Center were removed from the analysis.

FLO Analytics | 1-888-847-0299 | www.flo-analytics.com

R:\F1867.01 Lakewood School District\Document\004_2022.04.04 Student Generation Report\Lakewood SD Student Generation Report 2022.docx

All students (grades kindergarten [K] through 12) in the October 2021, Student Information System (SIS) were geocoded; however, the analysis considered only students that reside within the district boundary. Any students geocoded to locations not within a parcel (e.g., along a street right-of-way) were relocated within the parcel corresponding to the student’s address. The student address points were then compared to the 2017–2021 residential construction data. These two data sets were spatially joined to create a record that indicates the development, the number of students living at a location, and all pertinent attributes for this analysis, including current grade level. With this combination of information, SGRs were calculated for SF housing, 0–1 BR MF units, and 2+ BR MF units as detailed in the results below.

RESULTS

Single-Family Residential Unit Rates

All new SF residential units (constructed between 2017 and 2021) from the SCAO were compared with the District’s October 2021 SIS, and the number of students at each grade level living in those units was determined. The 127 SF units were compared to the 2,602 students enrolled within the District, and the following matches were found by grade level(s):

Table 1. Rate of Matches by Grade for Single-Family Units

| Grade | Matches | Rate |
|-------|---------|-------|
| K | 2 | 0.016 |
| 1 | 5 | 0.039 |
| 2 | 6 | 0.047 |
| 3 | 1 | 0.008 |
| 4 | 1 | 0.008 |
| 5 | 1 | 0.008 |
| 6 | 5 | 0.039 |
| 7 | 3 | 0.024 |
| 8 | 2 | 0.016 |
| 9 | 2 | 0.016 |
| 10 | 3 | 0.024 |
| 11 | 1 | 0.008 |
| 12 | 2 | 0.016 |
| <hr/> | | |
| K-5 | 16 | 0.126 |
| 6-8 | 10 | 0.079 |
| 9-12 | 8 | 0.063 |
| K-12 | 34 | 0.263 |

Multifamily Developments

While SF data are nearly completely accounted for in the SCAO data, there are significant data gaps with regard to MF construction. For instance, the SCAO MF development data do not include the number of bedrooms in the building and parcels may be layered on top of one another on occasion. FLO performed additional research to determine the number of MF units and breakdown of units by bedroom count, as well as to remove all duplicate parcels. To aid this effort, FLO received additional SIS attributes from the District including the number or letter identifier of the MF units in which students reside.

FLO reached out to the building management at the six projects constructed between January 2017 and December 2021 to ascertain the bedroom count of each unit that housed students. Information given to the building management consisted of only the unit identifier; no identifying information was disclosed. FLO received bedroom count information for Villas at Arlington, Trailside at the Lodge, and Twin Lakes Landing. Despite numerous attempts, no bedroom information could be received from The Landing at Smokey Pointe for the two students living at units within this building. Based on trends within and surrounding the district, we assumed both students reside within a 2+ BR unit. No students reside at Affinity at Arlington and the unnamed garden style apartment.

Multifamily 0-1 BR Rates

FLO calculated the MF 0-1 BR SGRs by comparing data on 0-1 BR MF units with the District's October 2021 SIS and determining the number of students at each grade level living in those units. As of this writing, FLO estimates that 114 0-1 BR units were constructed from 2017 to 2021. Matches to current students are indicated in the table below.

Table 2. Rate of Matches by Grade for Multifamily 0-1 BR Units

| Grade | Matches | Rate |
|-------|---------|-------|
| K | 0 | 0.000 |
| 1 | 0 | 0.000 |
| 2 | 1 | 0.009 |
| 3 | 0 | 0.000 |
| 4 | 0 | 0.000 |
| 5 | 2 | 0.018 |
| 6 | 0 | 0.000 |
| 7 | 0 | 0.000 |
| 8 | 0 | 0.000 |
| 9 | 0 | 0.000 |
| 10 | 0 | 0.000 |
| 11 | 0 | 0.000 |
| 12 | 0 | 0.000 |
| <hr/> | | |
| K-5 | 3 | 0.026 |
| 6-8 | 0 | 0.000 |
| 9-12 | 0 | 0.000 |
| K-12 | 3 | 0.026 |

Multifamily 2+ BR Rates

FLO calculated the MF 2+ BR SGRs by comparing data on 2+ BR MF units with the District's October 2021 SIS and determining the number of students at each grade level living in those units. It is estimated that 734 2+ BR units were constructed from 2017 to 2021. Matches to current students are indicated in the table below.

Table 3. Rate of Matches by Grade for Multifamily 2+ BR Units

| Grade | Matches | Rate |
|-------|---------|-------|
| K | 16 | 0.022 |
| 1 | 9 | 0.012 |
| 2 | 12 | 0.016 |
| 3 | 11 | 0.015 |
| 4 | 13 | 0.018 |
| 5 | 13 | 0.018 |
| 6 | 11 | 0.015 |
| 7 | 10 | 0.014 |
| 8 | 7 | 0.010 |
| 9 | 12 | 0.016 |
| 10 | 9 | 0.012 |
| 11 | 4 | 0.005 |
| 12 | 8 | 0.011 |
| <hr/> | | |
| K-5 | 83 | 0.101 |
| 6-8 | 28 | 0.038 |
| 9-12 | 33 | 0.045 |
| K-12 | 144 | 0.184 |

Summary of Student Generation Rates

Table 4. Student Generation Rate Summary by Housing Type and Aggregated Grade Levels

| Type | PS-5 | 6-8 | 9-12 | PS-12 |
|--------------------|-------|-------|-------|-------|
| Single-family | 0.126 | 0.079 | 0.063 | 0.268 |
| Multifamily 0-1 BR | 0.026 | 0.000 | 0.000 | 0.026 |
| Multifamily 2+ BR | 0.101 | 0.038 | 0.045 | 0.184 |

Summary of 2017-2021 Multifamily Developments

Table 5. Summary of Multifamily Developments by Elementary School Boundary

| Building Name | Number of Units | School |
|--------------------------------|-----------------|---------------------|
| The Landing at Smokey Pointe | 48 | English Crossing ES |
| Villas at Arlington | 312 | English Crossing ES |
| Trailside at The Lodge | 250 | English Crossing ES |
| Affinity At Arlington | 170 | Cougar Creek ES |
| Twin Lakes Landing | 50 | Cougar Creek ES |
| Unnamed Garden Style Apartment | 18 | English Crossing ES |

Summary of Single-Family Housing Built by Year

Table 6. Summary of Single-Family Housing Construction by Year

| 2017 | 2018 | 2019 | 2020 | 2021 |
|------|------|------|------|------|
| 11 | 23 | 36 | 36 | 21 |

APPENDIX C

SCHOOL IMPACT FEE CALCULATIONS

This section does not updated for the 2024-2029 Capital Facilities Plan since the District is not requesting a school impact fee. Future updates to this CFP may include an impact fee.



MONROE SCHOOL DISTRICT

**CAPITAL FACILITIES PLAN
2024–2029**

Adopted: August 12, 2024

CAPITAL FACILITIES PLAN MONROE SCHOOL DISTRICT NO. 103

BOARD OF DIRECTORS

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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.

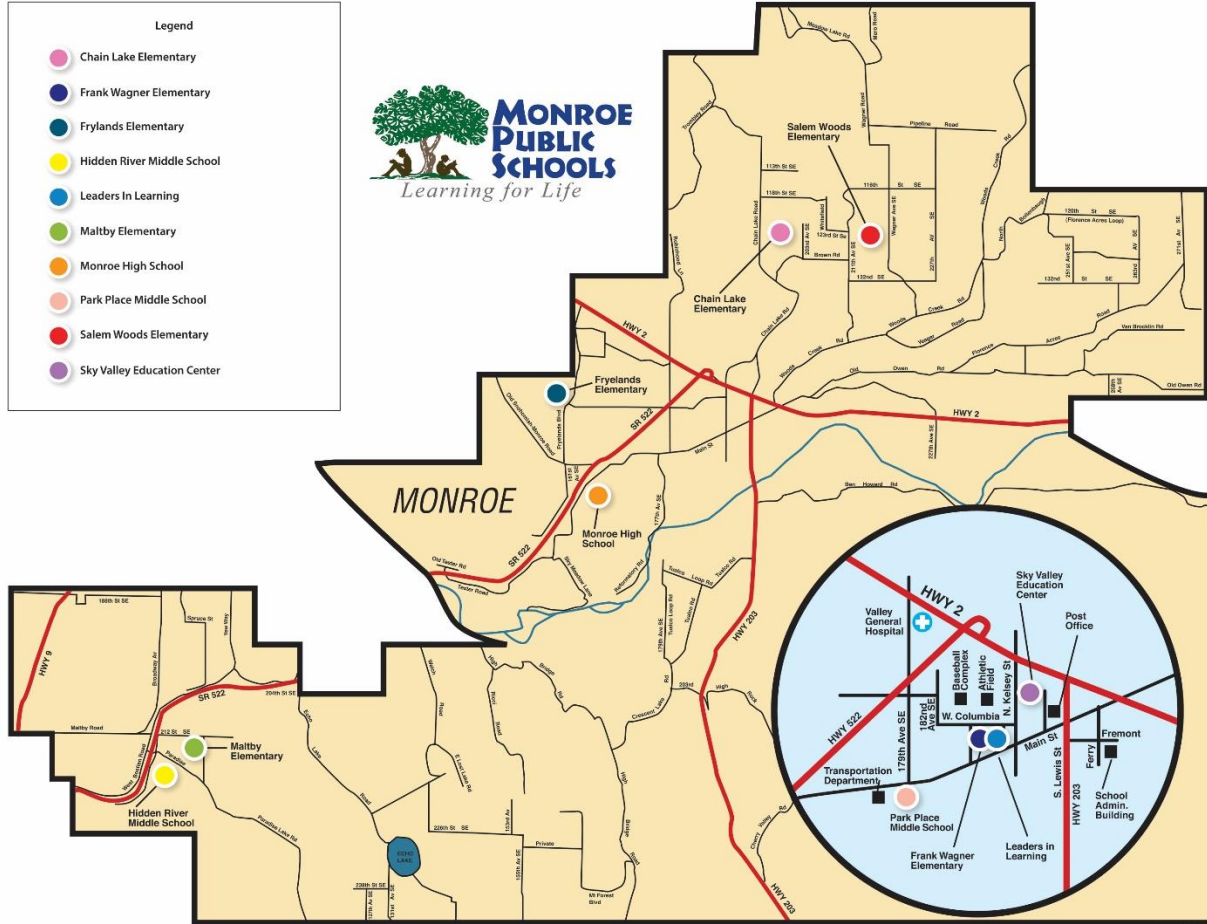
Significant Issues Related To Facility Planning In the Monroe School District

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
 - 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.
- 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 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.

Table 12: Impact Fee Variables

| | | | |
|--|---------------|---|----------------|
| Student Generation Factors – Single Family | | Average Site Cost/Acre | |
| Elementary | .205 | | N/A |
| Middle | .062 | | |
| Senior | .071 | | |
| Total | .338 | | |
| Student Generation Factors – TH/Duplex | | Temporary Facility Capacity | |
| Elementary | .101 | Capacity | |
| Middle | .121 | Cost | |
| Senior | .030 | | |
| Total | .253 | State Match Credit (OSPI) | |
| | | Current State Match Percentage | 43.52% |
| Student Generation Factors – Multi Family (2+ Bdrm) | | Construction Cost Allocation (OSPI) | |
| Elementary | .239 | Current CCA | 375.00 |
| Middle | .076 | | |
| Senior | .125 | District Average Assessed Value | |
| Total | .440 | Single Family Residence | \$734,031 |
| Projected Student Capacity per Facility (Table 11) | | District Average Assessed Value (Sno Cty) | |
| Elementary (new addition – Salem Woods) - 88 | | Multi Family (1 Bedroom) | \$175,173 |
| Elementary (new addition – Frank Wagner) – 88 | | Multi Family (2+ Bedroom) | \$242,411 |
| Required Site Acreage per Facility | | SPI Square Footage per Student (WAC 392-343-035) | |
| Facility Construction/Cost Average (Table 10) | | Elementary | 90 |
| Salem Woods (Addition) | \$6,743,852 | Middle | 108 |
| Frank Wagner (Addition) | \$5,185,102 | High | 130 |
| | | District Debt Service Tax Rate for Bonds (Sno Cty) | |
| | | Current/\$1,000 | \$0.673444 |
| Permanent Facility Square Footage (MSD Inventory) | | General Obligation Bond Interest Rate (Bond Buyer) | |
| Elementary | 310,369 | Current Bond Buyer Index | 3.48% |
| Middle | 242,677 | | |
| Senior | 245,122 | Developer Provided Sites/Facilities | |
| Total | 97.76% | Value | 0 |
| | | Dwelling Units | 0 |
| | | Total Facility Square Footage | |
| | | Elementary | 321,196 |
| | | Middle | 244,213 |
| | | Senior | 252,682 |
| | | Total | 100.00% |
| | | | 818,091 |

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.



Mukilteo
School District

MUKILTEO SCHOOL DISTRICT NO. 6

CAPITAL FACILITIES PLAN 2024 – 2029

BOARD OF DIRECTORS

Simon Bai
John Gahagan
Charles Hauck
Kyle Kennedy
Judy Schwab

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 16, 2024

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SECTION 1 - INTRODUCTION

Purpose of the Capital Facilities Plan

The Washington State Growth Management Act (GMA) outlines 15 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, 2024-2029.

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 14,646 (October 2023) 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 9-12). For the purposes of facility planning, this CFP considers grades K-5 as elementary, grades 6-8 as middle school, and grades 9-12 as high school. For purposes of this CFP, enrollment in the Sno-Isle Skills Center is not included 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.
- Uncertainty of growth rates for new housing development and enrollment given the unprecedented nature of the Covid-19 pandemic and its ongoing impacts on construction and district enrollment. While the District experienced a pandemic-related enrollment decline, future projections still show growth and Snohomish County's Comprehensive Plan continues to identify large population growth in the coming years with high concentrations in the Mukilteo School District boundary areas.

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 required 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 specialized education, multilingual education, early childhood learning 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 |
| Multi-Lingual Learner | Occupational Therapy/Physical Therapy |
| Dual Language | 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 | ACES Big Picture |

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 increase or decrease in a school).

District educational program standards may change in the future because 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 through 3rd grade is 21 students per classroom
- Class size for Kindergarten through third grade cannot exceed 25 students
- Planning class size grades 4 and 5 is 23 students per classroom
- Class size for grades 4 and 5 cannot exceed 26 students
- Special Education for some students is provided in self-contained classrooms of 8-12 students per classroom
- Music and physical education instruction will be provided in a separate classroom
- Schools 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 through 8 cannot exceed 30 students
- Planning class size for high school grades is 27 students per teacher
- Class size for high school grades 9 through 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 Multi-Lingual 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 | 2021-22 Level of Service | 2022-23 Level of Service |
|-------------|----------------------------------|-----------------------|--------------------------|--------------------------|
| K-5 | 325 | 25 | 20.4 | 20.6 |
| 6-8 | 166 | 30 | 21.3 | 21.0 |
| 9-12 | 161 | 33 | 28.0 | 27.8 |

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 with three schools currently also serving preschool; 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 | 57,469 | 1987/2023 | 385 |
| Columbia | 9.6 | 65,219 | 1989 | 520 |
| Discovery | 9.3 | 76,270 | 1988/2017/2022 | 534 |
| Endeavour | 9.4 | 53,376 | 1994 | 376 |
| Fairmount | 15 | 66,189 | 1952/1999 | 505 |
| Horizon | 19 | 57,164 | 1989/2023 | 436 |
| Lake Stickney | 9.8 | 74,167 | 2016 | 632 |
| Mukilteo | 9.8 | 41,706 | 1981 | 429 |
| Odyssey | 10.9 | 60,631 | 2003 | 511 |
| Olivia Park | 9.5 | 49,881 | 1956/1992 | 582 |
| Pathfinder* | | 65,035 | 2017 | 378 |
| Picnic Point | 10 | 39,271 | 1981 | 389 |
| Serene Lake | 10 | 42,740 | 1969/1994 | 377 |
| Total K-5 | 132 | 749,118 | | 6,054 |
| Explorer | 29.5 | 129,539 | 1972/2005 | 915 |
| Harbour Pointe | 17.8 | 110,400 | 1993 | 819 |
| Olympic View | 25.2 | 114,541 | 1955/2017 | 951 |
| Voyager | 16 | 106,954 | 1992 | 918 |
| Total 6-8 | 89 | 461,434 | | 3,603 |
| ACES | 5.8 | 19,833 | 1985/1997 | 0 |
| Kamiak | 60.7 | 255,478 | 1993/2002 | 1,675 |
| Mariner | 37.1 | 281,560 | 1971/2003/2019 | 1,964 |
| Total 9-12 | 104 | 556,871 | | 3,639 |

*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 128 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 – 2023-24 Portable Classroom Inventory

| School | Classroom Portables | Interim Capacity |
|----------------------|---------------------|------------------|
| Challenger | 11 | 175 |
| Columbia | 0 | 0 |
| Discovery | 14 | 280 |
| Endeavour | 6 | 71 |
| Fairmount | 4 | 0 |
| Horizon | 6 | 100 |
| Lake Stickney | 0 | 0 |
| Mukilteo | 10 | 108 |
| Odyssey | 8 | 91 |
| Olivia Park | 5 | 25 |
| Pathfinder | 0 | 0 |
| Picnic Point | 6 | 96 |
| Serene Lake | 4 | 100 |
| Subtotal K-5 | 74 | 1,046 |
| Explorer | 8 | 161 |
| Harbour Pointe | 1 | 0 |
| Olympic View | 0 | 0 |
| Voyager | 0 | 0 |
| Subtotal 6-8 | 9 | 161 |
| ACES | 13 | 200 |
| Kamiak | 16 | 329 |
| Mariner | 16 | 354 |
| Subtotal 9-12 | 45 | 883 |
| TOTAL K-12 | 128 | 2,090 |

**The District's portable classrooms are in good condition and with ongoing maintenance have an indeterminate remaining useful life. Portables are calculated at 986 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

| Facility | Address | Building Area (Square Feet) | Site Size (Acres) |
|-------------------------|----------------------------|--|------------------------------|
| Administration | 9401 Sharon Dr., Everett | 26,608 | 9.15 |
| Grounds/Maintenance | 525 W. Casino Rd., Everett | 22,800 | 4.0 |
| Support Services Center | 8925 Airport Rd., Everett | 37,677 | 10.0 |

Table 3.4 – Other Facility Inventory

| Facility | Address | Building Area (Square Feet) | Site Size (Acres) |
|------------------------|---------------------------|--|------------------------------|
| 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 2024-2029

Enrollment projections are generally most accurate for the initial years of the forecast period. Beyond the 5-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. Dr. Les Kendrick has more than thirty years of history working with local school districts in projecting enrollment and demographics, including many 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 this, 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. 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 period. Likewise, the COVID-19 pandemic in 2020 and related impacts have caused small enrollment declines but projections for both enrollment growth and new housing development show increases in near and long-term future. OSPI uses straight cohort survival which results in the projections contained in Appendix C. Because of the above listed gaps in that methodology, the District relies on our consultant's projections to gain a more comprehensive and accurate estimate.

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 forecasts enrollment by combining cohort survival methodology with information about new housing development and the “birth-to-k” ratio methodology mentioned above. This model results in District enrollment reaching 15,077 by 2029. Because of the known information regarding new development 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 Head Count (including housing permit data and birth rate data)

| Grade | Actual 2023 | Projections | | | | | |
|-----------------------|---------------|---------------|---------------|---------------|---------------|---------------|---------------|
| | | 2024 | 2025 | 2026 | 2027 | 2028 | 2029 |
| K | 1,003 | 1,011 | 975 | 1,043 | 1,051 | 1,056 | 1,058 |
| 1 | 1,146 | 1,083 | 1,094 | 1,054 | 1,128 | 1,134 | 1,145 |
| 2 | 1,203 | 1,171 | 1,109 | 1,119 | 1,078 | 1,151 | 1,163 |
| 3 | 1,095 | 1,223 | 1,193 | 1,129 | 1,139 | 1,095 | 1,175 |
| 4 | 1,188 | 1,105 | 1,236 | 1,205 | 1,140 | 1,148 | 1,109 |
| 5 | 1,143 | 1,211 | 1,129 | 1,262 | 1,229 | 1,161 | 1,175 |
| 6 | 1,106 | 1,145 | 1,215 | 1,131 | 1,265 | 1,230 | 1,167 |
| 7 | 1,112 | 1,117 | 1,159 | 1,229 | 1,144 | 1,277 | 1,247 |
| 8 | 1,120 | 1,124 | 1,132 | 1,172 | 1,243 | 1,155 | 1,295 |
| 9 | 1,179 | 1,118 | 1,124 | 1,131 | 1,171 | 1,240 | 1,158 |
| 10 | 1,195 | 1,173 | 1,114 | 1,119 | 1,126 | 1,164 | 1,238 |
| 11 | 1,157 | 1,128 | 1,109 | 1,052 | 1,057 | 1,061 | 1,103 |
| 12 | 999 | 1,116 | 1,108 | 1,088 | 1,033 | 1,035 | 1,044 |
| Total K-5 | 6,778 | 6,804 | 6,736 | 6,812 | 6,765 | 6,745 | 6,825 |
| Total 6-8 | 3,338 | 3,386 | 3,506 | 3,532 | 3,652 | 3,662 | 3,709 |
| Total 9-12 | 4,530 | 4,535 | 4,455 | 4,390 | 4,387 | 4,500 | 4,543 |
| District Total | 14,646 | 14,725 | 14,697 | 14,734 | 14,804 | 14,907 | 15,077 |

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 and the District’s corresponding actual enrollment, the District’s enrollment averaged 1.7% of the OFM/County Population estimates. Further, District enrollment averaged 13% 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 - 2044 OFM Estimates*

| Grade Level | Actual 2023 | % MSD Population | | % County Population | |
|----------------------|---------------|------------------|---------------|---------------------|---------------|
| | | 2029 | 2044 | 2029 | 2044 |
| Elementary | 6,778 | 7,455 | 9,196 | 7,439 | 8,958 |
| Middle School | 3,338 | 3,671 | 4,529 | 3,663 | 4,411 |
| High School | 4,530 | 4,982 | 6,146 | 4,971 | 5,987 |
| Total | 14,646 | 16,108 | 19,871 | 16,073 | 19,356 |

*Assumes that percentage per grade span will remain constant through 2044.

Note: Snohomish County Planning and Development Services provided the underlying data for the 2044 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 (2024-2029). A six-year 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. Remaining, planned new capacity improvements included in that bond are represented below, through the 2025-26 school year. A potential future capital bond beyond 2026 may include classroom capacity projects as well. Future CFP updates will reflect projects that may get approved in the potential 2026 bond and will include updates to school capacities and impact fees resulting from those projects when they are known.

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 to ensure our ability to serve enrollment growth from new development in between construction and capital bond timelines. 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

| | 2023-24 | 2024-25 | 2025-26 | 2026-27 | 2027-28 | 2028-29 | 2029-30 |
|--|----------------|----------------|----------------|----------------|----------------|----------------|----------------|
| Elementary Enrollment | 6,778 | 6,804 | 6,736 | 6,812 | 6,765 | 6,745 | 6,825 |
| Permanent Capacity - Existing | 6,054 | 6,054 | 6,054 | 6,254 | 6,254 | 6,254 | 6,254 |
| New Permanent Capacity | | | 200 | | | | |
| TOTAL Permanent Capacity | 6,054 | 6,054 | 6,254 | 6,254 | 6,254 | 6,254 | 6,254 |
| Permanent Capacity over/(short) | (724) | (750) | (482) | (558) | (511) | (491) | (571) |
| | | | | | | | |
| Middle School Enrollment | 3,338 | 3,386 | 3,506 | 3,532 | 3,652 | 3,662 | 3,709 |
| Permanent Capacity - Existing | 3,603 | 3,603 | 3,603 | 3,603 | 3,603 | 3,603 | 3,603 |
| New Permanent Capacity | | | | | | | |
| TOTAL Permanent Capacity | 3,603 | 3,603 | 3,603 | 3,603 | 3,603 | 3,603 | 3,603 |
| Permanent Capacity over/(short) | 265 | 217 | 97 | 71 | (49) | (59) | (106) |
| | | | | | | | |
| High School Enrollment | 4,530 | 4,535 | 4,455 | 4,390 | 4,387 | 4,500 | 4,543 |
| Permanent Capacity - Existing | 3,639 | 3,639 | 3,639 | 3,639 | 3,639 | 3,639 | 3,639 |
| New Permanent Capacity | | | | | | | |
| TOTAL Permanent Capacity | 3,639 | 3,639 | 3,639 | 3,639 | 3,639 | 3,639 | 3,639 |
| Permanent Capacity over/(short) | (891) | (896) | (816) | (751) | (748) | (861) | (904) |
| | | | | | | | |
| TOTAL ENROLLMENT | 14,646 | 14,725 | 14,697 | 14,734 | 14,804 | 14,907 | 15,077 |
| Total Permanent | 13,296 | 13,296 | 13,296 | 13,496 | 13,496 | 13,496 | 13,496 |
| Total New Permanent | | | 200 | | | | |
| TOTAL Permanent Capacity | 13,296 | 13,296 | 13,496 | 13,496 | 13,496 | 13,496 | 13,496 |
| Permanent Capacity over/(short) | (1,350) | (1,429) | (1,201) | (1,238) | (1,308) | (1,411) | (1,581) |

Does not include interim/portable capacity

SECTION 6 – SIX-YEAR FINANCING PLAN

Planned Improvements

If 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 students from schools over capacity to those with capacity
- Increased class sizes; or
- A modified school-year calendar

The six-year financing plan includes any projects adding elementary, middle, 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 may 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 several 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 2028. 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 secondary 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 mandatory 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 2024-2029. The financing components include the voter-approved 2022 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 | 2023 | ANTICIPATED YEAR | | | | | | Total Cost | POTENTIAL FUNDING SOURCE | | | |
|------------------------------------|-------------|------------------|-------------|------------|------|------|------|---------------|--------------------------|-----------------|----------------|------------------|
| | | 2024 | 2025 | 2026 | 2027 | 2028 | 2029 | | Bonds/ Levy | SCAP (State) | Impact Fees | Future Source |
| Mariner H.S. Addition & Renovation | 7.5 | 16.9 | 0.1 | | | | | 24.5 | X | X | | |
| Explorer Replacement Ph 1 | 1.0 | 14.2 | 14.7 | 0.1 | | | | 30.0 | X | X | | |
| Serene Lake Replacement Ph 1 | 1.5 | 10.5 | 9.5 | 0.5 | | | | 22.0 | X | X | X | |
| Mukilteo Elem Replacement Ph 1 | 1.9 | 8.5 | 14.2 | 0.8 | | | | 25.4 | X | X | X | |
| Interim (portable) Capacity | - | 0.2 | 0.2 | 0.2 | | | | 0.6 | X | | X | |
| TOTAL CAPACITY PROJECTS | 11.9 | 50.3 | 38.7 | 1.6 | | | | 102.5 | | | | |

| PROJECTS NOT ADDING CAPACITY | 2023 | ANTICIPATED YEAR | | | | | | Total Cost | POTENTIAL FUNDING SOURCE | | | |
|-------------------------------------|-------------|------------------|-------------|-------------|------|------|------|---------------|--------------------------|-----------------|----------------|------------------|
| | | 2024 | 2025 | 2026 | 2027 | 2028 | 2029 | | Bonds/ Levy | SCAP (State) | Impact Fees | Future Source |
| Districtwide Security Improvements | 2.3 | 3.6 | 3.1 | 1.0 | | | | 10.0 | X | | | X |
| Districtwide Field Improvements | 4.1 | 0.2 | 0.5 | 3.4 | | | | 8.2 | X | | | X |
| Districtwide Roofing Improvements | 0.5 | 0.5 | 0.5 | 0.5 | | | | 2.0 | X | | | X |
| Districtwide Flooring Improvements | 0.4 | 0.4 | 0.4 | 0.4 | | | | 1.6 | X | | | X |
| Districtwide ADA Improvements | 0.5 | 0.5 | 0.5 | 0.5 | | | | 2.0 | X | | | X |
| Performing Arts Center Improvements | 0.7 | 8.5 | 0.2 | | | | | 9.4 | X | | | |
| Facility System Improvements | 10.8 | 8.5 | 9.0 | 7.5 | | | | 35.8 | X | | | X |
| TOTAL Non-CAPACITY PROJ. | 19.3 | 22.2 | 14.2 | 13.3 | | | | 69.0 | | | | |

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 at least 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 (including townhomes/duplexes) and multi-family dwellings. A student generation rate study was conducted to determine the updated generation rate for this CFP. New home development data was collected from 2017-2022 and compared against Fall 2023 student enrollment to determine the number of students generated by the different types of new home development. Specifically, there were 1,294 new single family and townhome or

duplex dwelling units during the period 2017-2022 generating 292 K-12 students. There were 326 1-bedroom multi-family dwelling units generating 148 students and 1,244 2+bedroom multi-family dwelling units generating 1,203 students. Currently, the large multi-family developments in Mukilteo School District generate far larger numbers of K-12 students than single family or townhome developments.

Table 7.1 – Student Generation Rates

| Development | Total Units | K-5 Students | 6-8 Students | 9-12 Students |
|-----------------------|--------------------|---------------------|---------------------|----------------------|
| Single Family* | 1294 | 218 | 42 | 32 |
| Multi-Family 1bd/less | 326 | 94 | 31 | 23 |
| Multi-Family 2+bd | 1244 | 755 | 219 | 229 |
| Total | 2864 | 1067 | 292 | 284 |

*Includes Townhome/Duplex

| Grade Span | Single Family | Multi-Family (1bdm/less) | Multi-Family (2+bedroom) |
|---------------------|----------------------|---------------------------------|---------------------------------|
| Elementary (K-5) | .168 | .288 | .607 |
| Middle School (6-8) | .032 | .095 | .176 |
| High School (9-12) | .025 | .071 | .184 |
| Total (K-12) | .226 | .454 | .967 |

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 for 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 \$375.00 for new construction projects approved in July of 2024.
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 50.98% 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 2024 average interest rate of 3.48%
2. Bond Levy Rate – The current bond levy rate is \$.877 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 \$766,679 for single family dwelling units; \$212,571 for one-bedroom multi-family dwelling units; and \$294,163 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. The impact fees below for Mukilteo School District reflect Single Family, Townhomes and Duplexes, Multi-Family 1 bedroom, and Multi-Family 2+bedroom dwelling units.

Table 7.2 – School Impact Fees*

| Housing Type | Impact Fee Per Unit |
|-----------------------------------|---------------------|
| Single Family | \$0** |
| Townhomes and Duplexes | \$0** |
| Multi-Family (1 bedroom or less) | \$1,148 |
| Multi-Family (2+ bedroom or more) | \$2,985 |

**Table 7.2 reflects a 50% adjustment to the calculated fee as required by local ordinances*

***While the District did see new students generated from both Single Family and Townhomes and Duplexes during the study period, the rate generated and the total number of those development types when computed in the required fee formula, including the above noted required 50% adjustment, resulted in no fee being calculated.*

Mukilteo School District’s 2024 updated school impact fees have dropped considerably from the last CFP update. This is because of several key points:

- The required impact fee formula determines the final outcome of the fee. The primary driver for the reduction in this CFP’s fee is that the District is near the end of its six-year capital bond cycle. The District passed a voter-approved \$240 million capital bond in February, 2020. The voter-approved bond package included several projects adding much needed new school capacity to house growth from new development. The District prioritized building those projects early in the bond cycle to bring the new capacity online as soon as possible. That resulted in increased construction costs for those projects factoring into impact fee calculations for the 2020 and 2022 CFP updates.

- At the same time, the District was experiencing the impact of several very large multi-family dwelling unit complexes being built and beginning to be occupied. Those developments generated very large numbers of students which began to be reflected in impact fee calculations causing increases in multi-family dwelling unit fees in 2018, 2020, and 2022. While the 2024 student generation rates continue to show large numbers of students from those development types, the reduced construction costs associated with District projects adding capacity (mentioned above) result in a reduction of the calculated impact fee per the required formula.
- In 2024, the Washington State Legislature increased the Construction Cost Allocation (CCA) to \$375 per square foot from \$275 per square foot. This increase results in an increase in the state funding credit portion of the impact fee formula, thereby reducing the final calculated impact fee.
- No anticipated future construction projects adding classroom capacity beyond 2026 are included in the 2024 CFP update as planning for a future bond is still in progress. This also results in lower impact fees as, with the exception of the Serene Lake Elementary School project, there are no planned projects to use in the impact fee formula calculation. As the District completes its bond planning in advance of a potential 2026 capital bond measure to put forward to voters, the District will be better able to determine additional capacity needs from growth because its jurisdictional comprehensive plan updates will also be completed and resulting growth and enrollment can be better projected. It is anticipated that the 2026 CFP will include impact fee calculations that reflect future growth and increased planned construction projects to address it.

APPENDIX A – SCHOOL IMPACT FEE CALCULATION

School Site Acquisition Cost:

| | Facility Acreage | Cost/Acre | Facility Capacity | Student Factor SFR | Student Factor T/D | Student Factor MFR (1) | Student Factor MFR (2+) | Cost/ SFR | Cost/ T/D | Cost / MFR 1 | Cost / MFR 2+ |
|--------------|---------------------|-----------|----------------------|--------------------------|--------------------------|------------------------------|----------------------------------|--------------|--------------|-----------------|------------------|
| Elementary | 10 | \$ - | 600 | 0.168 | 0.168 | 0.288 | 0.607 | \$0 | \$0 | \$0 | \$0 |
| Middle | 20 | \$ - | 800 | 0.032 | 0.032 | 0.095 | 0.176 | \$0 | \$0 | \$0 | \$0 |
| High | 40 | \$ - | 1,600 | 0.025 | 0.025 | 0.071 | 0.184 | \$0 | \$0 | \$0 | \$0 |
| TOTAL | | | | | | | | \$0 | \$0 | \$0 | \$0 |

School Construction Cost:

| | % Perm/Tot al Sq. Ft | Facility Cost | Capacity | Student Factor SFR | Student Factor T/D | Student Factor MFR (1) | Student Factor MFR (2+) | Cost/ SFR | Cost/ T/D | Cost / MFR 1 | Cost/ MFR 2+ |
|--------------|----------------------------|------------------|----------|--------------------------|--------------------------|------------------------------|----------------------------------|----------------|----------------|-----------------|-----------------|
| Elementary | 91.12% | \$19,748,733 | 600 | 0.168 | 0.168 | 0.288 | 0.607 | \$5,039 | \$5,039 | \$8,638 | \$18,206 |
| Middle | 98.11% | \$ - | 800 | 0.032 | 0.032 | 0.095 | 0.176 | \$0 | \$0 | \$0 | \$0 |
| High | 92.62% | \$ - | 1600 | 0.025 | 0.025 | 0.071 | 0.184 | \$0 | \$0 | \$0 | \$0 |
| TOTAL | | | | | | | | \$5,039 | \$5,039 | \$8,638 | \$18,206 |

Temporary Facility Cost:

| | % Temp/To tal Sq. Ft. | Facility Cost | Facility Capacity | Student Factor SFR | Student Factor T/D | Student Factor MFR (1) | Student Factor MFR (2+) | Cost/ SFR | Cost/ T/D | Cost / MFR 1 | Cost/ MFR 2+ |
|--------------|--------------------------------|------------------|----------------------|--------------------------|--------------------------|------------------------------|----------------------------------|--------------|--------------|-----------------|-----------------|
| Elementary | 8.88% | \$130,000 | 25 | 0.168 | 0.168 | 0.288 | 0.607 | \$78 | \$78 | \$133 | \$280 |
| Middle | 1.89% | \$130,000 | 27 | 0.032 | 0.032 | 0.095 | 0.176 | \$3 | \$3 | \$9 | \$16 |
| High | 7.38% | \$130,000 | 30 | 0.025 | 0.025 | 0.071 | 0.184 | \$8 | \$8 | \$23 | \$59 |
| TOTAL | | | | | | | | \$88 | \$88 | \$164 | \$355 |

State Funding Assistance:

| | Current CCA | OSPI Sq. Footage | District Funding % | Student Factor SFR | Student Factor SFR | Student Factor MFR (1) | Student Factor MFR (2+) | Cost/ SFR | Cost/ T/D | Cost / MFR 1 | Cost/ MFR 2+ |
|--------------|----------------|---------------------|--------------------------|--------------------------|--------------------------|------------------------------|----------------------------------|----------------|----------------|-----------------|-----------------|
| Elementary | \$375.00 | 90 | 50.98% | 0.168 | 0.168 | 0.288 | 0.607 | \$2,891 | \$2,891 | \$4,955 | \$10,444 |
| Middle | \$ | 108 | 50.98% | 0.032 | 0.032 | 0.095 | 0.176 | \$0 | \$0 | \$0 | \$0 |
| High | \$ | 130 | 50.98% | 0.025 | 0.025 | 0.071 | 0.184 | \$0 | \$0 | \$0 | \$0 |
| TOTAL | | | | | | | | \$2,891 | \$2,891 | \$4,955 | \$10,444 |

Tax Payment Credit Calculation:

| | | | | |
|---------------------------|----------------|----------------|----------------|----------------|
| Ave. Assessed Value | \$766,679 | \$766,679 | \$212,571 | \$294,163 |
| Capital Bond Int. Rate | 3.48% | 3.48% | 3.48% | 3.48% |
| Years Amortized | 10 | 10 | 10 | 10 |
| Property Tax Levy Rate | \$0.877 | \$0.877 | \$0.877 | \$0.877 |
| Tax Payment Credit | \$5,598 | \$5,598 | \$1,552 | \$2,148 |

Impact Fee Calculation Summary:

| | | | | |
|--------------------------|------------------|------------------|----------------|----------------|
| Site Acquisition Cost | \$0 | \$0 | \$0 | \$0 |
| Permanent Facility Cost | \$5,039 | \$5,039 | \$8,638 | \$18,206 |
| Temporary Facility Cost | \$88 | \$88 | \$164 | \$355 |
| State SCAP Credit | (\$2,891) | (\$2,891) | (\$4,955) | (\$10,444) |
| Tax Payment Credit | (\$5,598) | (\$5,598) | (\$1,552) | (\$2,148) |
| Fee As Calculated | (\$3,361) | (\$3,361) | \$2,295 | \$5,969 |
| 50% Required Discount | (\$1,680) | (\$1,680) | (\$1,148) | \$2,985 |
| Impact Fee | \$0 | \$0 | \$1,148 | \$2,985 |

APPENDIX B

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 --- | | | | | |
|----------------------------|---|---------------|---------------|---------------|---------------|---------------|-----------------------|-------------------------------|---------------|---------------|---------------|---------------|---------------|
| | 2018 | 2019 | 2020 | 2021 | 2022 | 2023 | | 2024 | 2025 | 2026 | 2027 | 2028 | 2029 |
| Kindergarten | 1,185 | 1,184 | 966 | 1,124 | 1,050 | 1,003 | | 970 | 937 | 904 | 871 | 838 | 805 |
| Grade 1 | 1,187 | 1,188 | 1,141 | 1,043 | 1,180 | 1,146 | 103.74% | 1,041 | 1,006 | 972 | 938 | 904 | 869 |
| Grade 2 | 1,159 | 1,185 | 1,112 | 1,148 | 1,065 | 1,203 | 99.61% | 1,142 | 1,037 | 1,002 | 968 | 934 | 900 |
| Grade 3 | 1,152 | 1,163 | 1,114 | 1,112 | 1,152 | 1,095 | 99.49% | 1,197 | 1,136 | 1,032 | 997 | 963 | 929 |
| Grade 4 | 1,222 | 1,158 | 1,126 | 1,087 | 1,114 | 1,188 | 99.63% | 1,091 | 1,193 | 1,132 | 1,028 | 993 | 959 |
| Grade 5 | 1,255 | 1,224 | 1,106 | 1,110 | 1,118 | 1,143 | 99.93% | 1,187 | 1,090 | 1,192 | 1,131 | 1,027 | 992 |
| K-5 Sub-Total | 7,160 | 7,102 | 6,565 | 6,624 | 6,679 | 6,778 | | 6,628 | 6,399 | 6,234 | 5,933 | 5,659 | 5,454 |
| Grade 6 | 1,270 | 1,228 | 1,169 | 1,098 | 1,115 | 1,106 | 98.39% | 1,125 | 1,168 | 1,072 | 1,173 | 1,113 | 1,010 |
| Grade 7 | 1,191 | 1,292 | 1,188 | 1,176 | 1,108 | 1,112 | 99.94% | 1,105 | 1,124 | 1,167 | 1,071 | 1,172 | 1,112 |
| Grade 8 | 1,186 | 1,168 | 1,242 | 1,182 | 1,186 | 1,120 | 99.12% | 1,102 | 1,095 | 1,114 | 1,157 | 1,062 | 1,162 |
| 6-8 Sub-Total | 3,647 | 3,688 | 3,599 | 3,456 | 3,409 | 3,338 | | 3,332 | 3,387 | 3,353 | 3,401 | 3,347 | 3,284 |
| Grade 9 | 1,252 | 1,182 | 1,144 | 1,215 | 1,187 | 1,179 | 99.04% | 1,109 | 1,091 | 1,084 | 1,103 | 1,146 | 1,052 |
| Grade 10 | 1,163 | 1,247 | 1,180 | 1,108 | 1,207 | 1,192 | 99.20% | 1,170 | 1,100 | 1,082 | 1,075 | 1,094 | 1,137 |
| Grade 11 | 1,368 | 1,403 | 1,466 | 1,397 | 1,431 | 1,547 | 122.77% | 1,463 | 1,436 | 1,350 | 1,328 | 1,320 | 1,343 |
| Grade 12 | 1,444 | 1,412 | 1,491 | 1,555 | 1,441 | 1,443 | 103.90% | 1,607 | 1,520 | 1,492 | 1,403 | 1,380 | 1,371 |
| 9-12 Sub-Total | 5,227 | 5,244 | 5,281 | 5,275 | 5,266 | 5,361 | | 5,349 | 5,147 | 5,008 | 4,909 | 4,940 | 4,903 |
| DISTRICT K-12 TOTAL | 16,034 | 16,034 | 15,445 | 15,355 | 15,354 | 15,477 | | 15,309 | 14,933 | 14,595 | 14,243 | 13,946 | 13,641 |

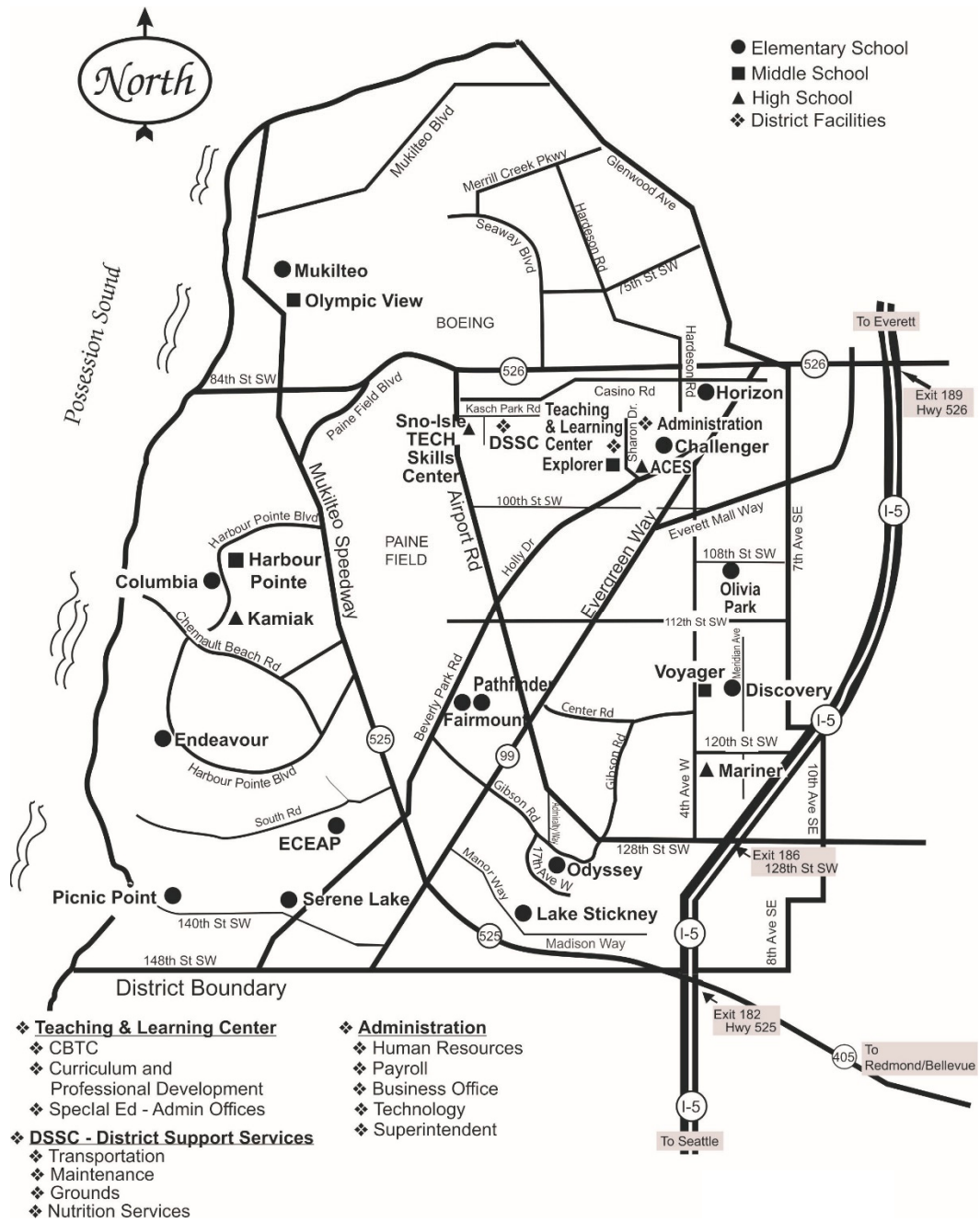
Notes: Specific subtotalling on this report will be driven by District Grade spans.

School Facilities and Organization

Printed Apr 03, 2024

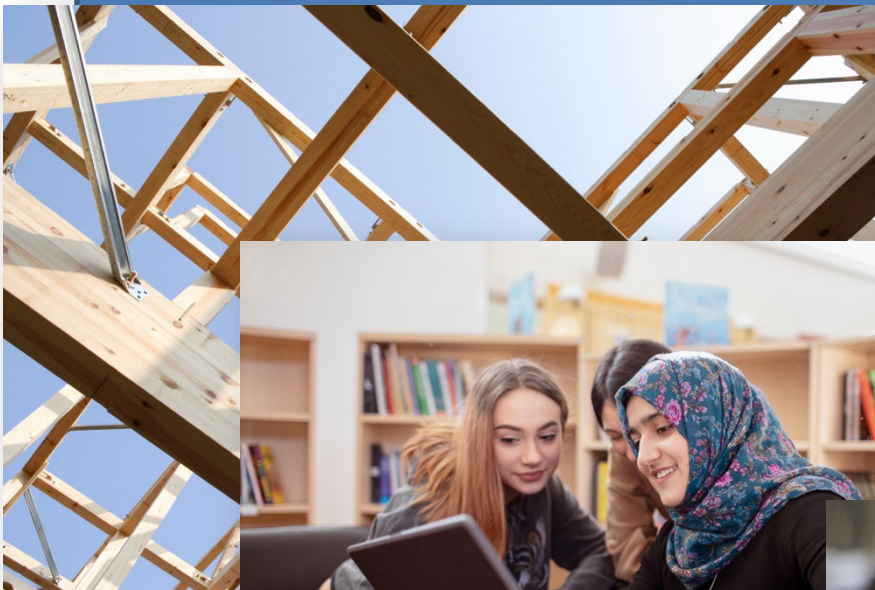
APPENDIX C

MUKILTEO SCHOOL DISTRICT MAP



Capital Facilities Plan 2024-30

Northshore School District
June 2024



CAPITAL FACILITIES PLAN

2024 - 2030

NORTHSHORE SCHOOL DISTRICT NO. 417

3330 Monte Villa Parkway, Bothell, Washington 98021-8972

STRENGTHENING OUR COMMUNITY THROUGH EXCELLENCE IN EDUCATION

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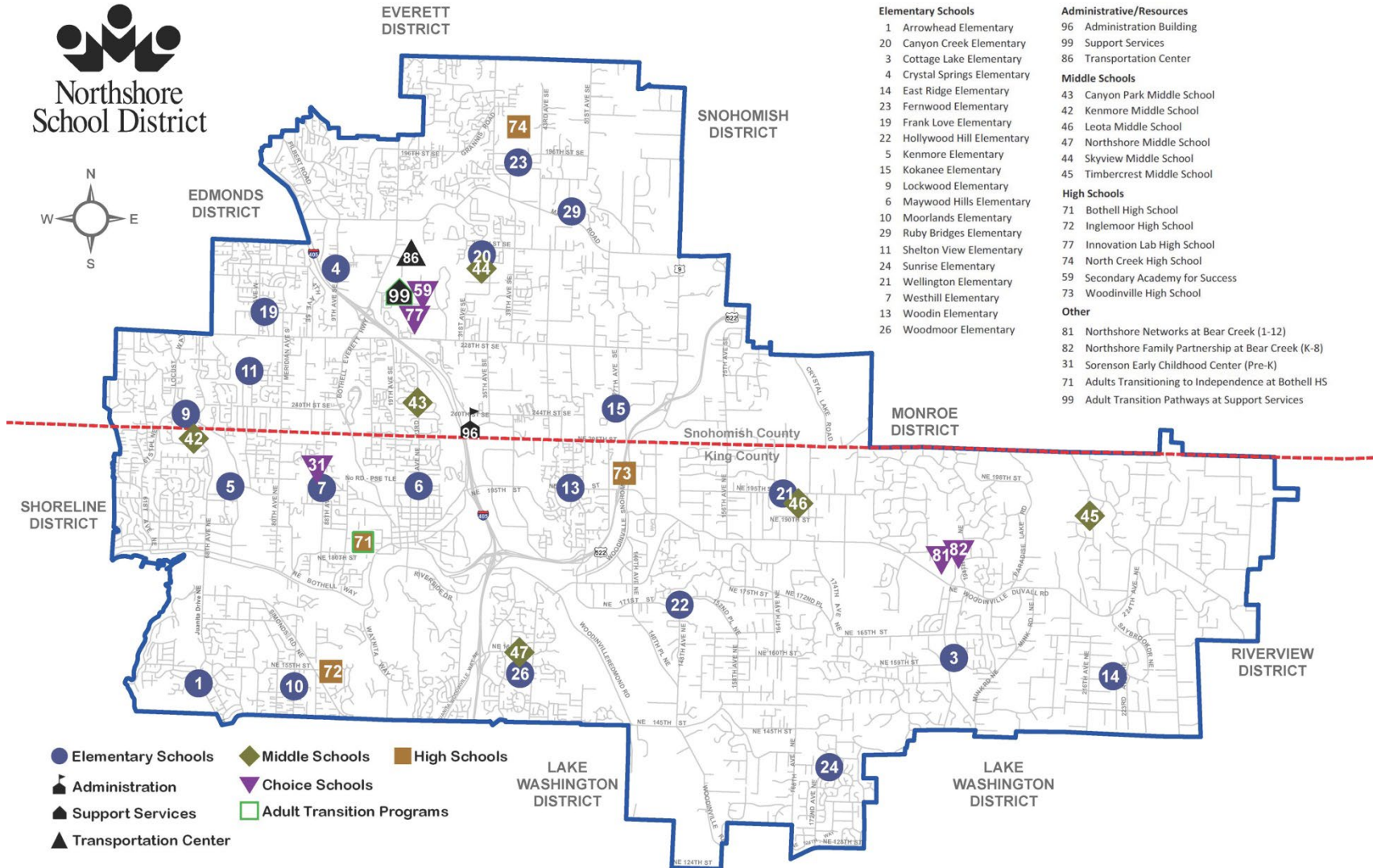
Michael Tolley



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2023 Northshore School District Map



- | | |
|------------------------------|---|
| Elementary Schools | Administrative/Resources |
| 1 Arrowhead Elementary | 96 Administration Building |
| 20 Canyon Creek Elementary | 99 Support Services |
| 3 Cottage Lake Elementary | 86 Transportation Center |
| 4 Crystal Springs Elementary | Middle Schools |
| 14 East Ridge Elementary | 43 Canyon Park Middle School |
| 23 Fernwood Elementary | 42 Kenmore Middle School |
| 19 Frank Love Elementary | 46 Leota Middle School |
| 22 Hollywood Hill Elementary | 47 Northshore Middle School |
| 5 Kenmore Elementary | 44 Skyview Middle School |
| 15 Kokanee Elementary | 45 Timbercrest Middle School |
| 9 Lockwood Elementary | High Schools |
| 6 Maywood Hills Elementary | 71 Bothell High School |
| 10 Moorlands Elementary | 72 Inglemoor High School |
| 29 Ruby Bridges Elementary | 77 Innovation Lab High School |
| 11 Shelton View Elementary | 74 North Creek High School |
| 24 Sunrise Elementary | 59 Secondary Academy for Success |
| 21 Wellington Elementary | 73 Woodinville High School |
| 7 Westhill Elementary | Other |
| 13 Woodin Elementary | 81 Northshore Networks at Bear Creek (1-12) |
| 26 Woodmoor Elementary | 82 Northshore Family Partnership at Bear Creek (K-8) |
| | 31 Sorenson Early Childhood Center (Pre-K) |
| | 71 Adults Transitioning to Independence at Bothell HS |
| | 99 Adult Transition Pathways at Support Services |

- | | | |
|-------------------------|-----------------------------|----------------|
| ● Elementary Schools | ◆ Middle Schools | ■ High Schools |
| ▲ Administration | ▼ Choice Schools | |
| ▲ Support Services | □ Adult Transition Programs | |
| ▲ Transportation Center | | |

Introduction

Section 1

Purpose of the Capital Facilities Plan

The Washington State Growth Management Act outlines fifteen 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 (NSD/District) has prepared this six-year Capital Facilities Plan (CFP) in accordance with the Washington State Growth Management Act and 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 2024-2030. It also provides longer-term enrollment projections. The role of impact fees in funding school construction is addressed in **Section 6** of this report.

The District updates its Capital Facilities Plan on an annual basis. The most recent update previous to this version was adopted by the Board of Directors in August 2023.

Overview of the Northshore School District

Schools & Programs

The Northshore School District currently operates twenty elementary schools, six middle schools, and four comprehensive high schools. NSD also has one choice high school (Innovation Lab High School), one alternative high school (Secondary Academy for Success), a hybrid combination of choice school with high levels of parent involvement (Northshore Networks), a home school program, (Northshore Family Partnership Program), a virtual learning school (Northshore Online Academy) and an early childhood center (Sorenson Early Childhood Center). The current grade configuration is K-5, 6-8, and 9-12.

Geographic

NSD 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 NSD’s grade bands. The King-Snohomish County line divides NSD such that roughly two-thirds of the District’s geographic area is in King County and one-third in Snohomish County.

Population

The Snohomish County portion of the district had a total population of 65,566 people, with a 1,087 (1.69%) increase in population from the previous year. Annual growth continues more in Snohomish County (1.19%) than in King (0.77%). County population projections also call for continued growth across both counties. The Washington State Office of Financial Management (OFM) forecasted the Snohomish County population for the year of 2029 at 943,590 residents, an increase of 83,790 (9.7%) over six years. OFM forecasts a similar picture for King County over the same 5-year period. In 2029, the population is forecasted to be 2,465,936 (3.71%), an increase of 88,199 residents.

Urban Growth Area & County Jurisdictions

The Urban Growth Area boundary (UGA) divides NSD, creating capacity utilization challenges. As new residential development continues to occur at moderate rates, land for potential new school sites is scarce. King County does not allow for school siting outside the UGA, but Snohomish County does provide for school siting in certain rural zones via a Conditional Use Permit (CUP) process.

Currently, *The Snohomish County 2024 Comprehensive Plan Update* includes Ordinance No. 24-030. If the motion remains in the plan in its current form it will include an expansion of the Southwest County Urban Growth Area to include zoning changes for approximately 378 acres lying within the Northshore School District boundary. The expansion may occur in the “43rd Avenue Area” and the “45th Avenue Area.” Ordinance No. 24-030 states:

43rd Avenue Area

The expansion within this area focuses on transitioning from Rural Residential to urban density classifications. This includes designations for urban medium-density residential (UMDR) and urban low-density residential (ULDR), which are expected to accommodate a significant portion of the population growth.

45th Avenue Area

Similar to the 43rd Avenue Area, this expansion targets a transition to support urban residential development, specifically emphasizing Urban Low-Density Residential (ULDR) zoning. This area is also poised to support the anticipated increase in population through strategic land use planning.

Snohomish County’s Countywide Planning Policies mandate that jurisdictions within the county “ensure the availability of sufficient land and services for future K-12 school needs.” This directive is outlined in Policy ED-11. The district remains committed to monitoring the developments of *The Snohomish County 2024 Comprehensive Plan Update* and Motion 22-134, evaluating opportunities for accommodating anticipated growth.

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-22 (formerly PF-19A) of the King County Countywide Planning Policies. NSD appreciates any opportunity for cooperative planning efforts with its jurisdictions.

Section 2

Enrollment

Enrollment Summary

From 2020 to 2023, Northshore School District (NSD) saw a decrease of 295 students, contrasting with an increase of 1,134 students from 2016 to 2021. This shift aligns with declining birth rates in Snohomish and King Counties, which have been down since 2017, from 35,150 births to 32,867 in 2022, a 6.50% decline. Factors such as economic conditions, housing affordability, later family planning, and preferences for smaller families, compounded by the pandemic's impact, contribute to this decrease. However, loss of enrollment appears to be slowing and stalled out. In 2020 the district experienced a 1.1% loss in enrollment, and in 2021 there was a 1.2% loss. 2022 experienced a loss of 0.7% loss, resulting in 0.5% loss recovery from 2021. With the 2023 enrollment stabilizing with a slight increase of 0.3% we expect Fall of 2024-25 enrollment to continue stabilizing after the impact of the pandemic, and thereafter experience modest gains to reflect continued residential development within the District. Enrollment growth from new development is expected in the northern and central service areas primarily, with some slowed growth from the southern service areas.

Enrollment Trends

The District is seeing a distinct pattern in our enrollment, characterized by a wave of larger class sizes spanning grades 3 through 12, contrasted with smaller class sizes in kindergarten through second grade. This distribution is expected to persist and progress through our educational system over the next decade. As we adapt to this trend, alongside our recovery efforts from the pandemic and ongoing new development, our focus will intensify on managing the capacity challenges presented by these larger cohorts at the secondary level.

Forecast Data Factors

Kindergarten Enrollment

Historically, the Northshore School District's kindergarten enrollment has consistently represented between 4.00% to 5.00% of the total births in Snohomish and King counties combined. Despite the pandemic's fluctuating impact, our enrollment percentages have reliably stayed within this established range. Analysis up to 2023 shows this trend continuing, with the current year's kindergarten enrollment at 4.35% of total births. This consistency highlights the enduring preference of families for the Northshore School District, affirming our capacity to maintain historical enrollment levels despite recent adversities.

Planned Residential Development

While new single-family home construction and sales within NSD slowed in 2022 with 759 new single-family projects, it increased in 2023 to 832 additional planned single family projects (based on December 2023 development data). This data excludes short plat development. As larger tracts of land become more rare for developers to acquire within NSD, there is a trend towards more short plats as infill lots are purchased. The increasing number of short plats are beginning to impact enrollment in some areas, contributing to greater student yield factors than what is forecast. With a focus in each jurisdiction on higher density infill, we expect to see short plats play a greater role in the future when forecasting enrollment.

There continues to be strong growth in new townhome and multi-family projects that may produce enrollment gains. There were 3,987 multi-family projects in the pipeline in 2023, compared to 4,841 in 2022. New townhome developments often include units with 3 bedrooms or more.

We continue to see more students generated from townhomes than from apartments and condos as families find that townhomes may be more affordable than a single detached family home. Recent figures allow us to segregate how many new students are generated from townhomes/duplexes and to calculate a separate impact fee for those jurisdictions that have a separate fee category for this unit type. The District plans to continue to monitor townhome/duplex student generation closely.

In addition, if future adjustments are made to the UGA in Snohomish County, larger lots may once again become available to developers with the potential of increased NSD student enrollment. This analysis and its implications are comprehensively documented in the demographers' report.

Forecasts

Cohort Survival Methodology

The cohort survival method that tracks student groups over time, adjusting for average yearly changes to predict future grades' enrollments.

OSPI uses the cohort survival method to predict enrollment for all school districts in the state for the limited purpose of funding decisions under the School Construction Assistance Program (SCAP). 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. For kindergarten, linear extrapolation can be misleading because it needs to account for changing birth rates. The reliability of this method has been challenged not only by the COVID-19 pandemic but also by shifts in economic conditions,

housing affordability, family planning trends, and preferences for smaller families, all of which could influence enrollment projections for years as adjustments to these diverse factors take shape.

[Modified Cohort Survival Methodology](#)

NSD works with professional demographers to combine the cohort survival enrollment projection methodology with other information about births, housing, regional population trends, mobility, and trends in service area, homeschooling, and private school enrollment. The District's enrollment projections were updated in February 2023, with the demographers' report detailing these findings and methodologies on file with the District for review and reference.

The modified cohort survival methodology in **Table 2.1** shows continued enrollment increases within the District through the six-year planning period. The methodology uses a “high range” projection. In total, the projected K-12 increase in enrollment is 1,906 students over the six-year period. However, the forecast does not include the impact of Ordinance No. 24-030 within the *Snohomish County Comprehensive Plan Update* (see page 6 above). If the adopted Comprehensive Plan implements the motion in its current form, the District expects to see an expansion of the Southwest County Urban Growth Area to include zoning changes for approximately 378 acres lying within the Northshore School District boundary. For this reason, NSD is using high enrollment forecast figures in planning for future capacity needs.

NSD intends to watch enrollment closely and will update the projections and related planning as necessary based on actual results. However, given recent trends and knowledge of potential UGA expansion, and current residential development within the pipeline, the District expects to see continued growth throughout the six-year planning period and beyond, especially at the secondary level.

[High-Range Enrollment Forecast](#)
Table 2.1

| Grade | Actual | Projections | | | | | |
|--------------|---------------|---------------|---------------|---------------|---------------|---------------|---------------|
| | 23/24 | 24/25 | 25/26 | 26/27 | 27/28 | 28/29 | 29/30 |
| Kinder | 1,484 | 1,517 | 1,483 | 1,514 | 1,506 | 1,506 | 1,561 |
| 1st | 1,595 | 1,584 | 1,627 | 1,583 | 1,617 | 1,613 | 1,636 |
| 2nd | 1,759 | 1,655 | 1,644 | 1,700 | 1,654 | 1,697 | 1,692 |
| 3rd | 1,668 | 1,796 | 1,690 | 1,692 | 1,750 | 1,711 | 1,751 |
| 4th | 1,784 | 1,704 | 1,835 | 1,747 | 1,749 | 1,818 | 1,824 |
| 5th | 1,756 | 1,807 | 1,726 | 1,883 | 1,793 | 1,804 | 1,833 |
| 6th | 1,735 | 1,789 | 1,841 | 1,776 | 1,937 | 1,850 | 1,935 |
| 7th | 1,769 | 1,773 | 1,829 | 1,903 | 1,835 | 2,008 | 1,930 |
| 8th | 1,763 | 1,786 | 1,794 | 1,874 | 1,950 | 1,883 | 1,967 |
| 9th | 1,785 | 1,853 | 1,877 | 1,882 | 1,966 | 2,045 | 2,161 |
| 10th | 1,890 | 1,818 | 1,883 | 1,908 | 1,922 | 2,008 | 2,018 |
| 11th | 1,698 | 1,793 | 1,723 | 1,834 | 1,858 | 1,872 | 2,034 |
| 12th | 1,705 | 1,674 | 1,768 | 1,723 | 1,833 | 1,857 | 1,955 |
| Total | 22,391 | 22,549 | 22,720 | 23,019 | 23,370 | 23,672 | 24,297 |
| K-5th | 10,046 | 10,063 | 10,005 | 10,119 | 10,069 | 10,149 | 10,297 |
| 6th-8th | 5,267 | 5,348 | 5,464 | 5,553 | 5,722 | 5,741 | 5,832 |
| 9th-12th | 7,078 | 7,138 | 7,251 | 7,347 | 7,579 | 7,782 | 8,168 |

Long Range Forecasts

The modified cohort methodology described above was extrapolated to 2032 to produce a longer-range forecast (**Table 2.2**). Using this methodology, NSD’s enrollment shows continued growth from 2023 to 2032 of 2,706 students. This longer range model assumes that the Washington State forecasts of births, K-12 growth, and continued population growth for the Puget Sound area are reasonably accurate.

The wave of increased secondary students can also be observed in **Table 2.2** with significant middle school growth by 2027 and high school by 2030. In addition, elementary growth accelerates after 2028.

[10-Year High-Range Enrollment Forecast](#)
Table 2.2

| Grade | Oct-24 | Oct-29 | Oct-33 | 10 Year Total Growth |
|--------------|---------------|---------------|---------------|----------------------|
| K-5th | 10,063 | 10,297 | 10,635 | 589 |
| 6th-8th | 5,348 | 5,832 | 5,961 | 694 |
| 9th-12th | 7,138 | 8,168 | 8,480 | 1,402 |
| Total | 22,549 | 24,297 | 25,076 | 2,685 |

Future growth trends can be uncertain. Changes in population growth, fertility rates, new housing development slowdown, or a sharp downturn in the economic conditions could have a major impact on long term enrollment. Given this uncertainty, the current forecasts should be considered reasonable estimates based on the best information available, but subject to change as newer information about trends becomes available.

Snohomish County/OFM Forecasts

The following information is required by Snohomish County as a part of the biennial CFP update. It includes data specific to Snohomish County only. King County does not require a similar 2044 analysis. The District finds generally that enrollment projections beyond the six-year planning period become less reliable and it instead relies on regular updates to reflect current demographic information.

Using Washington State Office of Financial Management (OFM) and Snohomish County data, NSD projects a 2044 student FTE population of 30,922 (**Table 2.3**). For the six year period between 2016 and 2021, the District’s enrollment averaged 39.7% of the OFM/County population estimates. Based on the 2020 Census data, the District’s enrollment averaged 35.54% of the OFM/County population estimates. However, these figures assume that all of the District’s students reside in Snohomish County. This is not the case given that the NSD’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.

The October 2029 total forecast figure provided by OFM is 1,310 higher than the high-range forecast number used by NSD found in Table 2.2.

[FTE Enrollment Forecast – 2044 OFM/Snohomish County Estimates*](#)
Table 2.3

| Grade Band | Oct-20 | Oct-29 | Oct-44 |
|-------------------|---------------|---------------|---------------|
| Elementary | 10,212 | 11,664 | 14,085 |
| Middle | 5,322 | 6,079 | 7,341 |
| High | 6,885 | 7,864 | 9,497 |
| Total | 22,419 | 25,607 | 30,923 |

*Assumes that percentage per grade span will remain constant through 2044 which aligns with the Snohomish County requirement.

District Standard of Service

Section 3

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 consistent 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 goal of the District's Board of Directors. NSD continually strives for process and methods where all students have access to optimal learning environments. Additional variables include changes in mandatory requirements by Washington State. In the past, these have included 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

NSD provides traditional educational programs and nontraditional programs (**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 teacher to student ratios, privacy, the need for physical proximity to other services/facilities, noise, and level of physical activity. 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 Functional Skills and Academics would reflect lower capacities of the defined service levels (**Table 3.2**), with eight students per classroom instead of an average 25 students per classroom.

Capacity and Programs

Capacity is affected at buildings that house special programs. These 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).

Special teaching stations and programs offered by NSD at specific school sites are included in **Table 3.1**.

[Programs and Teaching Stations](#)
Table 3.1

| | Elementary | Secondary |
|---|------------|-----------|
| Group Activity Room | X | |
| Early Childhood | X | |
| Headstart (Federal) | X | |
| ECEAP (State) | X | |
| Elementary Advanced Program (EAP) | X | |
| Advanced Academic Program (AAP) | | X |
| Parents Active Cooperative in Education | X | |
| Dual Language | X | |
| Learning Assistance Program (LAP) | X | |
| Title 1 | X | |
| English Language Development (ELD) | X | X |
| Northshore Learning Options (NLO) | X | X |
| Secondary Academy for Success (SAS) | | X |
| International Baccalaureate (IB) | | X |
| Advanced Placement (AP) | | X |
| College in the High School | | X |
| Running Start | | X |
| Band & Jazz Band | X | X |
| Orchestra | X | X |
| Choir | | X |
| Special Education (SPED): | X | X |
| Learning Centers(LC) | X | X |
| Mid Level (ML) | X | X |
| Mid-Level Sensory (MLS) | X | |
| Mid-Level Social-Emotional (MLSEL) | X | |
| Mid-Level Blended (MLB) | X | |
| Aspire | | X |
| Functional Skills & Academics (FSA) | X | X |
| Adult Transition Pathways (ATP) | | X |
| Adult Transitioning to Independence | | |
| Career Technical Education (CTE): | | X |
| Includes specialized programs like Automotive, Composites, Culinary Arts, Robotics, Sustainable Engineering and Design, Project Lead the Way, Aeronautics, Marketing, Finance, and CAD. | | X |

[Standard of Service](#)

Northshore School District has established an average class size that does not exceed the sizes listed in **Table 3.2**.

Class sizes are averages based on actual utilization as influenced by state and/or contractual requirements, state funding, and instructional program standards.

Standard of Service
Table 3.2

| Program a Classroom Serves | Prek-5th Target # of Students Per Classroom | Middle School Target Number of Students Per Classroom | High School Target Number of Students Per Classroom |
|---|---|---|---|
| Special Education Preschool | 15 | N/A | N/A |
| Early Childhood & PreK | 16 | N/A | N/A |
| Kindergarten - 1st | 24 | N/A | N/A |
| Elementary 2nd - 3rd | 26 | N/A | N/A |
| Elementary 4th - 5th | 27 | N/A | N/A |
| Secondary 6th - 12th | N/A | 27 | 27 |
| Special Education Learning Center | 25 | 25 | 25 |
| Special Education Mid Level Blended | 12 | N/A | N/A |
| Special Education Mid Level | N/A | 10 | 10 |
| Special Education Sensory | 10 | N/A | N/A |
| Special Education Midlevel Social Emotional | 10 | N/A | N/A |
| Special Education Aspire | N/A | 8 | 8 |
| Special Education Functional Skills & Academics | 8 | 8 | 8 |
| Alternative Education | N/A | N/A | 15 |

K-5 capacity targets 88% utilization, accounting for programs like Special Ed and Arts, with secondary schools at 85% due to teacher and scheduling needs. Strategies to meet these targets, including portables or boundary changes, undergo EDTF review and public feedback.

Snohomish County

Snohomish County requires that the District’s plan include a report regarding NSD’s compliance with the District’s minimum levels of service. **Table 3.3** shows the District’s average students per teaching station as a measurement of its minimum levels of service as of October 1 for each year.

Average Students per Scheduled Teaching Station
(In classrooms without special programs)

Table 3.3

| Grade Level | # of Scheduled Teaching Stations | Minimum Level of Service | 2020-2021 | 2021-2022 | 2022-2023 |
|------------------------|----------------------------------|--------------------------|-----------|-----------|-----------|
| K - 5 | 457 | 24 | 21.4 | 20.9 | 21.6 |
| 6 - 8 | 237 | 26 | 25.4 | 25.1 | 22.5 |
| 9 -12 | 306 | 26 | 22.5 | 22.7 | 21.2 |
| Total / Average | 1,000 | | 23.1 | 22.9 | 21.7 |

Capital Facilities Inventory

Section 4

Inventory History

Of our current schools in the Northshore School District, Bothell High School is the oldest, originally constructed in 1953. This was followed by Kenmore Elementary in 1955, and Arrowhead and Crystal Springs Elementary Schools in 1956. Kenmore Middle School was built in 1961 during a growth boom that ran from 1953 – 1964. **Table 4.1** illustrates the age of each school, the dates of modernizations and added capacity, and the historical timeline.

[Historical Timeline of School Construction and Modernization](#)

Table 4.1

| School | Year Built | Last Modernization or Addition |
|----------------------|------------|--------------------------------|
| Arrowhead | 1957 | 1994/2011 |
| Bear Creek* | 1988 | 2011 |
| Canyon Creek | 1977 | 1999/2008/2020 |
| Cottage Lake | 1958 | 2005 |
| Crystal Springs | 1957 | 2002/2010/2022 |
| East Ridge | 1991 | |
| Fernwood | 1988 | 2002/2010/2022 |
| Frank Love | 1990 | |
| Hollywood Hill | 1980 | 2001 |
| Kenmore | 1955 | 2002/2011/2022 |
| Kokanee | 1994 | |
| Lockwood | 1962 | 2004/2011 |
| Maywood Hills | 1961 | 2002/2022 |
| Moorlands | 1963 | 2002/2011 |
| Ruby Bridges | 2020 | |
| Shelton View | 1969 | 1999/2011 |
| Sorenson ECC * | 2002 | 2022 |
| Sunrise | 1985 | |
| Wellington | 1978 | 2000/2011 |
| Westhill | 1960 | 1995/2011 |
| Woodin | 1970 | 2003/2022 |
| Woodmoor | 1994 | |
| Middle School | | |
| Canyon Park | 1964 | 2000/2005 |
| Kenmore | 1961 | 2002/2008/2012 |
| Leota | 1972 | 1998/2022 |
| Northshore | 1977 | 2004 |
| Skyview | 1992 | 2020 |
| Timbercrest | 1997 | |
| High School | | |
| Bothell | 1953 | 2005 |
| Inglemoor | 1964 | 1993/95/98/2022 |
| Innovation Lab | 2020 | |
| Woodinville | 1983 | 1994/08/11/16 |
| North Creek | 2016 | 2016 |
| SAS | 2010 | |

Capacity Definitions

The Growth Management Act requires a capacity analysis based on an inventory of existing capital facilities.

Instructional Capacity

Instructional capacity, also known as permanent capacity, reflects the number of students a school can accommodate based upon programming and adopted service standards. For instance, an elementary school designed for 300 students might have a lower functional capacity because specialized programs like full-day kindergarten, which overloads at 23 students per class, and special education, with class sizes often limited to fewer than 25 students, require more space per student. Therefore, instructional capacity must be recalculated annually to reflect these requirements, considering the number of special programs and different grade levels. The NSD sets classroom design capacities for initial planning and compares these to actual room utilization, which may reach only 85% in some facilities due to the need for teacher preparation spaces. In secondary schools, this utilization rate could be higher. Service levels and specific capacities for programs such as special education are detailed in Table 4.2. Changes in program needs and classroom usage are updated annually in the CFP to maintain accurate capacity assessments.

Inventory

Inventory of Instructional Capacity

Table 4.2 summarizes the instructional capacity owned and operated by the District, including the current permanent and relocatable classroom (portable) instructional student capacity.

2023-24 Instructional Capacity Inventory

Table 4.2

| | Permanent Instructional Capacity | Number of Instructional Portables | Total Number of Portables | Instructional Portable Capacity | Portable % of Total Capacity | Total Instructional Capacity |
|---------------------------|----------------------------------|-----------------------------------|---------------------------|---------------------------------|------------------------------|------------------------------|
| Elementary School | | | | | | |
| Arrowhead | 325 | | 5 | | 0% | 325 |
| Canyon Creek | 841 | 7 | 12 | 184 | 18% | 1,025 |
| Cottage Lake | 363 | | | | 0% | 363 |
| Crystal Springs | 379 | 5 | 10 | 150 | 28% | 529 |
| East Ridge | 436 | | | | 0% | 436 |
| Fernwood | 466 | 11 | 15 | 296 | 39% | 762 |
| Frank Love | 392 | 6 | 14 | 162 | 29% | 554 |
| Hollywood Hill | 393 | 1 | 2 | | 0% | 393 |
| Kenmore | 390 | | 9 | | 0% | 390 |
| Kokanee | 459 | 10 | 12 | 273 | 37% | 732 |
| Lockwood | 534 | 4 | 5 | 92 | 15% | 626 |
| Maywood Hills | 392 | 8 | 10 | 200 | 34% | 592 |
| Moorlands | 449 | 6 | 9 | 158 | 26% | 607 |
| Ruby Bridges | 520 | | | | 0% | 520 |
| Shelton View | 403 | 4 | 6 | 94 | 19% | 497 |
| Sunrise | 396 | | 1 | | 0% | 396 |
| Wellington | 417 | | 4 | | 0% | 417 |
| Westhill | 343 | 5 | 7 | 115 | 25% | 458 |
| Woodin | 407 | 3 | 6 | 96 | 19% | 503 |
| Woodmoor | 626 | | | | 0% | 626 |
| Elementary Totals | 8,931 | 70 | 127 | 1820 | 17% | 10751 |
| Middle School | | | | | | |
| Canyon Park | 1066 | 4 | 4 | 108 | 9% | 1174 |
| Kenmore | 920 | 1 | 1 | 27 | 3% | 947 |
| Leota | 946 | 7 | 7 | 159 | 14% | 1105 |
| Northshore | 1024 | 3 | 4 | 131 | 11% | 1155 |
| Skyview | 1,333 | 4 | 4 | 108 | 7% | 1,441 |
| Timbercrest | 958 | | | | 0% | 958 |
| Middle Total | 6,247 | 19 | 20 | 533 | 8% | 6,780 |
| High School | | | | | | |
| Bothell | 1,876 | | | | 0% | 1,876 |
| Inglemoor | 1,776 | 5 | 6 | 147 | 8% | 1,923 |
| North Creek | 1,714 | | | | 0% | 1,714 |
| Woodinville | 1,780 | | | | 0% | 1,780 |
| Innovation Lab | 486 | | | | 0% | 486 |
| SAS | 267 | | | | 0% | 267 |
| High School Totals | 7,899 | 5 | 6 | 147 | 2% | 8,046 |
| K12 Totals | 23,077 | 94 | 153 | 2,500 | 10% | 25,577 |

- The Bear Creek campus provides programs for the Northshore Learning Options and does not provide regular capacity.
- Sorenson Early Childhood Center serves students age 3-5 yrs. and does not provide capacity for K-12 grades;

Relocatable Classroom Facilities (Portables and Modulares)

Purpose & Data

Portable and modular classrooms provide temporary/interim classroom space to house students until permanent facilities can be constructed. They also prevent over-building of permanent capacity. 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, NSD anticipates a continued need for portables as a part of the capacity solution.

Traditionally, NSD 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. Currently, the instructional portable percentage of total capacity is at 11%.

Table 4.2 records the number of instructional portables at each school. Not included in the total classroom instructional capacity are portables that are used for restrooms, Special Education Resource Rooms, OT/PT, LAP, EL, music, or other instructional uses. Those being used by PTA, daycare, offices and conference rooms, and storage are counted as instructional capacity as these rooms are available to convert to a classroom, if necessary.

Aging Inventory

A typical portable classroom provides capacity for an approximate average of 25 students at the elementary level or 27 at the secondary level. Portables are used to meet a variety of instructional needs. Of the 153 portable classrooms that the District owns, 94 are currently being used as classrooms for scheduled classes.

The lifespan of a portable is approximately 20 years, and up to 25 years with proactive maintenance. Portables have been an effective method for meeting capacity needs in a district that has experienced rapid increases in enrollment. At this time, the District's inventory is aging with 97 of the 153 portables the district owns having reached 20 years of service.

Although the current bond is intended to replace approximately 55 aging portables, total capacity at schools with portables will be impacted in the future as the need to retire aging portables increases. Despite the slowing of growth due to the impact of COVID, the District continues to be reliant on this interim capacity.

Support Facilities & Underdeveloped Land

In addition to 34 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.

[Inventory of Support Facilities & Underdeveloped Land](#)
Table 4.3

| Facility Name | Building Area (Sq. Ft) | Site Size (Acreage) |
|--|------------------------|---------------------|
| Administrative Center (Monte Villa) | 49,000 | 5 |
| Support Services Building | 41,000 | 5 |
| Warehouse | 44,000 | 2 |
| Transportation | 39,000 | 9 |
| Paradise Lake Site* | | 26 |
| Wellington Hills Site** | | 104 |
| 19827 88th Ave NE | | 10 |
| 18416 88th Ave NE | | 50,011 Sq. Ft |
| 20521 48th Dr SE (This includes Ruby Bridges ES and the remaining undeveloped portion planned for a future school site.) | | 33 |
| 15215, 15123, 15127, 84th Ave NE and 8305 NE 153rd St (4 parcels adjacent to Moorlands ES) | | 49,993 Sq. Ft |

*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.

**The Wellington property is located in Snohomish County, adjacent to the Maltby Urban Growth Area. A settlement agreement recorded under Snohomish County Recording No. 201906210221 applies to the property. 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.

Projected Facility Needs

Section 5

Planning History

In 2001, the District's Board of Directors established by policy 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 EDTF recommends solutions to the Board. If approved by the Board, these recommended actions are implemented by the District and incorporated into the Capital Facilities Plan.

Mitigation

The District has accommodated growth in recent years largely through the construction of new capacity, limiting waivers at most schools, converting special-use portables and non-classroom spaces into classroom space, adjusting boundaries, moving programs, and adding portable classrooms. The 2022 bond projects, approved by our voters in February 2022, will provide for permanent capacity additions at all grade levels, as further detailed in this document.

Using October 2023 enrollment figures, District enrollment dropped by 1.3% or 295 new students during the previous three-year period. The high school grade span has grown by 246 new students in that time; a 3.6% increase. EDTF continues to monitor development and growth across the District. New development is expected in the northern and western sections, while slowing has occurred in the southern and eastern sections. EDTF identifies mitigation strategies (in order of priority) to address existing and future capacity needs (**Table 5.1**).

Capacity Mitigation Tools

Table 5.1

| Shorter Lead Time |
|--|
| Utilize existing spaces more efficiently |
| Adjust waiver policies |
| Adjust program placements |
| Move classes to schools with capacity |
| Move existing portables |
| Install new modulars or portables |
| Lease space |
| Longer Lead Time |
| Adjust service areas |
| Adjust feeder patterns |
| New construction |
| Acquire new property |

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. Despite the impacts of the pandemic on enrollment, growth continues to outpace school capacity. Growth has been concentrated in northern, central, and southern portions of NSD and is accelerating at the secondary level.

The \$425 million 2022 capital bond approved by the District’s voters includes eight new projects to add permanent capacity across the District at all grade levels, the District will be replacing outdated portable classrooms with permanent space for student learning, communal area and administrative function. The District has been working with selected teams of architects and contractors developing specific plans for each site identified in the 2022 capital bond. In developing the scope for each project, the District utilizes data calculating the forecast enrollment and potential need for classroom space, incorporating recent and future growth within each school’s boundaries.

- Inglemoor High School (IHS)
 - The replacement project for Inglemoor High School (IHS) is planned as a three-phase endeavor. Phase 1 will primarily entail the replacement of buildings 600 and 700, along with the installation of additional temporary classroom space. Specifically, 5 double portables, totaling 10 classrooms, will be installed to serve

as surge space during construction. This phase will focus on replacing classroom space, including science classrooms, and will also involve the construction of a new commons area.

Following Phase 1, the capacity of the high school will increase by 185 students. Phase 2, which is slated to be included in the 2026 bond, will concentrate on rebuilding the gymnasium and additional classrooms. The remainder of the school rebuild will be addressed in Phase 3.

- Leota Middle School (LMS)
 - The modernization project for Leota Middle School (LMS) is organized into two phases. Phase 1 will focus on replacing all existing portables, totaling 7, with permanent classrooms and creating new classroom space, thereby transitioning the capacity currently in portables to permanent classrooms. Phase 1 project will increase permanent capacity by 159 students. Phase 2, scheduled to be part of the 2026 bond, will address the rebuilding of the remaining school facilities. Upon completion of Phase 2, the capacity of Leota Middle School will be unchanged

- Kenmore Elementary School
 - Kenmore Elementary School currently incorporates 9 portables on site, with 5 dedicated to regular instruction and 4 utilized for specialist programs. The proposed modernization project envisions the relocation of these functions to permanent space, alongside the addition of 2 versatile multipurpose rooms. Furthermore, plans include the development of a fully inclusive playground and enhancements to site circulation to accommodate increased capacity. Upon completion, the school's permanent capacity will be unchanged and the school will be enhanced as the multi purpose space.

- Crystal Springs Elementary School
 - Crystal Springs currently has 10 portables on site, with 6 used for regular classroom instruction and 4 utilized for specialist programs. The modernization project proposes relocating the use of these 10 portables with permanent classrooms, ancillary space and offices. Additionally, plans include the construction of a new gym, commons, and stage, as well as a fully inclusive playground, additional parking, and improved site circulation to support increased capacity. Upon completion, the school's permanent capacity will increase by 175 students

- Fernwood Elementary School
 - Fernwood currently has 16 portables on site. 11 are used for regular classroom instruction. 1 is a restroom portable. 4 are used for specialists and programs. The modernization project proposes replacing the use of those 16 portables with permanent classrooms, offices, music rooms, and 2 multi-purpose spaces. Also proposed are an inclusive playground, additional parking, and improved site circulation to support increased capacity. The front office will also be replaced. The addition of two multi-purpose rooms will give the school flexibility. The new capacity will meet enrollment needs. If enrollment increases significantly, the multipurpose rooms may be converted to classrooms, increasing functional capacity at that time. Without the conversion of the multipurpose rooms the capacity of the school will increase upon completion by 330 students.

- Maywood Hills Elementary School
 - Maywood Hills Elementary School currently utilizes 10 portables on site, with 8 dedicated to regular classroom instruction and 2 allocated for specialist programs. The modernization project proposes relocate the use of these 10 portables within permanent space and adding 6 additional classrooms. Additionally, plans include the establishment of a fully inclusive playground and enhancements to site circulation to accommodate increased capacity. Upon completion, the school's permanent capacity will increase by 125 students

- Woodin Elementary School
 - Woodin currently has 6 portables on site. 3 are used for regular classroom instruction. 3 are used for specialists and programs. The modernization project proposes replacing those 6 portables with permanent space for current use including 2# music rooms, along with adding 3 additional permanent classrooms. Also proposed are a fully inclusive playground, additional parking, and improved site circulation to support increased capacity. A new gym will also be built. The school's permanent capacity will increase by 150 students.

- Sorenson Early Childhood Center (SECC)
 - SECC currently has 2 portables on site. Both are used for regular instruction. The modernization project proposes replacing those 2 portables with permanent classrooms, and adding 2 additional permanent classrooms. Also proposed are a fully inclusive playground, additional parking and circulation improvements to support increased capacity of 100 students.

In addition to the bond-funded projects listed above, the District plans to construct two modular

buildings, one on the North Creek High School campus and one on the Bothell High School campus. Funded from bond allocations and impact fees, both are designed to mitigate accelerating growth at the high school level. Each building is a permanent structure and not designed to be moved.

- Bothell High School (BHS)
 - Currently, BHS has six portables on site. These include some of the oldest portables in the district and are not appropriate for student learning. The portables will be replaced by a new fully enclosed modular building that will house the District’s Adults Transitioning into Independence (ATI) program with four new classrooms and create three new classrooms for use by BHS. In addition the building will contain an inclusive restroom, a conference/staff room and six offices. This project will increase permanent capacity by 160 students

- North Creek High School (NCHS)
 - There are no portables located on the NCHS campus. The school was recently built in response to expansive growth in the north end of the district. Although growth has slowed, it has not stopped. The school is currently over a 90% utilization rate. To address the immediate need for classrooms, a fully enclosed modular building with four new classrooms, including a science lab, is being constructed. This project will increase permanent capacity by 108 students.

Long-term high-range enrollment projections from 2024 – 2030 indicate growth of 1,906 new students. The District will address growth needs with permanent capacity and portables. The District will continue to monitor the factors that shape our capacity needs (such as 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). This information will help to inform when/where instructional space and, as relevant, additional land, is needed. Future updates to this CFP will include relevant information.

Table 5.2 summarizes the schools that will undergo construction from 2022- 2026. Where applicable, second phase projected construction is included for 2026 – 2030. Projects include permanent student capacity growth and modernization of key systems and structures.

Planned Capital Construction Projects

Table 5.2

| Capital Projects | Estimated Completion Date | 2022-26 Projected Permanent Student Capacity Added | 2026-30 Projected permanent student capacity added | Projected Total Permanent Student Capacity Added |
|---|---------------------------|--|--|--|
| Partial renovations and modernization to Crystal Springs El. | 2026 | 175 | 0 | 175 |
| Partial renovations and modernization to Fernwood El. | 2026 | 330 | 0 | 330 |
| Partial renovations and modernization to Kenmore El. | 2026 | 0 | 0 | 0 |
| Partial renovations and modernization to Maywood Hills El. | 2026 | 125 | 0 | 125 |
| Partial renovations and modernization to Woodin El. | 2026 | 150 | 0 | 150 |
| Construct and equip Phase 1 of Leota Middle School | 2026 | 159 | 0 | 159 |
| Construct and equip Phase 2 of Leota Middle School | 2030 | 0 | 0 | 0 |
| Construct and equip Phase 1 of Inglemoor High School | 2026 | 185 | 0 | 185 |
| Construct and equip Phase 2 of Inglemoor High School | 2030 | 0 | 0 | 0 |
| Construct and equip Phase 3 of Inglemoor High School | 2034 | 0 | 0 | 0 |
| Classroom addition at Sorenson Early Childhood Center | 2026 | 100 | 0 | 100 |
| Construct and equip modular building at Bothell High School | 2023 | 160 | 0 | 160 |
| Construct and equip modular building at North Creek High School | 2024 | 108 | 0 | 108 |

Portable Location Adjustments

Where growth results in capacity deficits at a specific grade band, portables may be relocated from one school to another to assist with meeting enrollment projections. Portables may also be purchased to add capacity.

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.

Capacity Analysis

The District's six-year capacity analysis, considering projected mid-range enrollment and planned new capacity, is shown in **Table 5.3**. The tables do not include all the potential projects for the 2026 bond, just projects with a second phase scheduled for that cycle.

As with any long-term projections, many assumptions and estimates on housing must be made, increasing the risk associated with the accuracy of enrollment forecasts. However, NSD 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.

NSD is in a planning year for the modernizations/additions of 8 school sites and the addition of modular capacity on 2 high school campuses. Estimated capacities for each site are used in this CFP. Adjustments may be made to capacities during planning in response to updated development data within a school's boundary area, and/or other needs that impact enrollment and capacity.

Enrollment Forecast and Instructional Classroom Capacity

Table 5.3

| | 2023-24* | 2024-25 | 2025-26 | 2026-27 | 2027-28 | 2028-29 | 2029-30 |
|--|----------------|----------------|--------------|--------------|--------------|--------------|--------------|
| Elementary School Analysis | | | | | | | |
| Enrollment Forecast | 10,046 | 10,063 | 10,005 | 10,119 | 10,069 | 10,149 | 10,297 |
| Permanent Capacity - Existing | 8,931 | 8,931 | 8,931 | 9,711 | 9,711 | 9,711 | 9,711 |
| New Permanent Capacity - Crystal Springs | | | 175 | | | | |
| New Permanent Capacity - Fernwood | | | 330 | | | | |
| New Permanent Capacity - Maywood Hills | | | 125 | | | | |
| New Permanent Capacity - Woodin | | | 150 | | | | |
| Total Permanent Capacity | 8,931 | 8,931 | 9,711 | 9,711 | 9,711 | 9,711 | 9,711 |
| Total Capacity in Portables | 1,820 | 1,820 | 1,078 | 1,078 | 1,078 | 1,078 | 1,078 |
| Total Capacity Including Portables | 10,751 | 10,751 | 10,789 | 10,789 | 10,789 | 10,789 | 10,789 |
| Permanent Capacity over/(short) | (1,115) | (1,132) | (294) | (408) | (358) | (438) | (586) |
| Total Capacity w/Portables over/(short) | 705 | 688 | 784 | 670 | 720 | 640 | 492 |
| Middle School Analysis | | | | | | | |
| Enrollment Forecast | 5,267 | 5,348 | 5,464 | 5,553 | 5,722 | 5,741 | 5,832 |
| Permanent Capacity - Existing | 6,247 | 6,247 | 6,247 | 6,406 | 6,406 | 6,406 | 6,406 |
| New Permanent Capacity - Leota | | | 159 | | | | - |
| Total Permanent Capacity | 6,247 | 6,247 | 6,406 | 6,406 | 6,406 | 6,406 | 6,406 |
| Total Capacity in Portables | 533 | 533 | 374 | 374 | 374 | 374 | 374 |
| Total Capacity Including Portables | 6,780 | 6,780 | 6,780 | 6,780 | 6,780 | 6,780 | 6,780 |
| Permanent Capacity over/(short) | 980 | 899 | 942 | 853 | 684 | 665 | 574 |
| Total Capacity w/Portables over/(short) | 1,513 | 1,432 | 1,316 | 1,227 | 1,058 | 1,039 | 948 |
| High School Analysis | | | | | | | |
| Enrollment Forecast | 7,078 | 7,138 | 7,251 | 7,347 | 7,579 | 7,782 | 8,168 |
| Permanent Capacity - Existing | 7,899 | 7,899 | 8,167 | 8,352 | 8,352 | 8,352 | 8,352 |
| New Permanent Capacity - Bothell | | 160 | | | | | - |
| New Permanent Capacity - Inglemoor | | | 185 | | | | - |
| New Permanent Capacity - North Creek | | 108 | | | | | |
| Total Permanent Capacity | 7,899 | 8,167 | 8,352 | 8,352 | 8,352 | 8,352 | 8,352 |
| Total Capacity in Portables | 147 | 147 | 147 | 147 | 147 | 147 | 147 |
| Total Capacity Including Portables | 8,046 | 8,314 | 8,499 | 8,499 | 8,499 | 8,499 | 8,499 |
| Permanent Capacity over/(short) | 821 | 1,029 | 1,101 | 1,005 | 773 | 570 | 184 |
| Total Capacity w/Portables over/(short) | 968 | 1,176 | 1,248 | 1,152 | 920 | 717 | 331 |
| District Analysis | | | | | | | |
| Enrollment Forecast | 22,391 | 22,549 | 22,720 | 23,019 | 23,370 | 23,672 | 24,297 |
| Permanent Capacity - Existing | 23,077 | 23,077 | 23,345 | 24,469 | 24,469 | 24,469 | 24,469 |
| New Permanent Capacity Total | | 268 | 1,124 | | | | - |
| Total Permanent Capacity | 23,077 | 23,345 | 24,469 | 24,469 | 24,469 | 24,469 | 24,469 |
| Total Capacity in Portables | 2,500 | 2,500 | 1,599 | 1,599 | 1,599 | 1,599 | 1,599 |
| Total Capacity Including Portables | 25,577 | 25,845 | 26,068 | 26,068 | 26,068 | 26,068 | 26,068 |
| Permanent Capacity over/(short) | 686 | 796 | 1,749 | 1,450 | 1,099 | 797 | 172 |
| Total Capacity w/Portables over/(short) | 3,186 | 3,296 | 3,348 | 3,049 | 2,698 | 2,396 | 1,771 |

*Actual October 2023 enrollment

This table does not include new or relocated portable facilities over the six-year planning period; it also does not include the addition of permanent capacity at Sorenson Early Childhood Center.

The District will use the creation of more permanent capacity and portables to address future growth needs. As part of this process, NSD will continue to monitor the factors that shape our capacity needs.

For long-term planning purposes, a ten-year capacity analysis can be created. **Table 5.4** utilizes demographers' NSD 10-year, high forecast to create the best possible projection given the data available to us. Note that the longer the period of time that a forecast covers, the less accurate it becomes. Factors such as unforeseen changes in population and development may impact actual results. An example of this is the recent COVID-10 pandemic and the influence it has had on demographic and development trends in school districts, including NSD.

2032 – Ten Year Forecast of Enrollment and Instructional Capacity

Table 5.4

| Grade Level | Enrollment | Permanent Capacity | Total Capacity | Permanent surplus/(short) | Total surplus/(short) |
|-------------------|------------|--------------------|----------------|---------------------------|-----------------------|
| Elementary School | 10,635 | 9,711 | 10,789 | (924) | 154 |
| Middle School | 5,961 | 6,406 | 6,780 | 445 | 819 |
| High School | 8,480 | 8,352 | 8,499 | (128) | 19 |
| Total | 25,076 | 24,469 | 26,068 | (607) | 992 |

Assumes added new capacity projects included in this CFP but no future near-term planning in process and no adjustment of portable facilities. Utilizes high-range figures for enrollment.

Planned Improvements – Existing Facilities (Building Improvement Program)

In a number of sites (not identified for additional capacity in the 2022 bond) 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. NSD continues to implement building improvement projects funded as a part of the 2018 Bond, and is currently planning implementation of improvements identified within the 2022 capital bond. See **Table 6.1** in Section 6.

Capital Facilities Financing Plan

Section 6

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 are 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 \$425 million bond measure to the voters in February 2022 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. The voters approved the bond measure by 61.2%.

The 2026 bond measure will help fund future projects, including Phase 2 of Leota and Phase 2 of Inglemoor. Additionally, the plan includes a future 2030 bond to fund Phase 3 of Inglemoor High 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 through the School Construction Assistance Program (SCAP) 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. The District is currently eligible for state school construction assistance funds at 38.11% level for eligible projects. Eligibility for SCAP funding is continually reviewed. 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. The table also identifies 2023-2024 and future planned expenditures. It does not include project expenditures from previous years.

8-Year Capital Facilities Expenditures Finance Plan
Table 6.1

| Projects Adding Capacity | FY 23-24 | FY 24-25 | FY 25-26 | FY 26-27 | FY 27-28 | FY 28-29 | FY 29-30 | FY 30-31 | Total | Potential Funding Source | | | | |
|------------------------------------|-------------|-------------|-------------|-------------|-------------|-------------|-------------|-------------|------------|--------------------------|------|------|--------|--------|
| | | | | | | | | | | Bonds | Levy | SCAP | Impact | Future |
| Inglemoor - Phase 1 | 5 | 50 | 35 | 5 | | | | | 95 | X | | X | X | |
| Inglemoor - Phase 2 | | | | 30 | 35 | 30 | 25 | | 120 | | | | X | X |
| Leota - Phase 1 | 4 | 30 | 21 | 4 | | | | | 59 | X | | | | |
| Leota - Phase 2 | | | | 20 | 25 | 20 | 15 | | 80 | | | | | X |
| Crystal Springs | 12 | 18 | 4 | | | | | | 34 | X | | X | X | |
| Fernwood | 12 | 18 | 5 | | | | | | 35 | X | | X | X | |
| Maywood | 7 | 21 | 15 | 3 | | | | | 46 | X | | | X | |
| Woodin | 10 | 17 | 2 | | | | | | 29 | X | | X | X | |
| Sorenson | 6 | 10 | 2 | | | | | | 18 | X | | | X | |
| Future Middle School | | | 1 | 5 | 60 | 30 | | | 96 | | | | | X |
| Bothell Modular Buildings | 4.5 | 1.5 | | | | | | | 6 | X | | | X | |
| North Creek Modular Buildings | 3.5 | 2.5 | | | | | | | 6 | | | | X | |
| Modular Buildings & Portables | 2 | | 2 | 2 | 2 | 2 | 2 | 2 | 14 | | | | X | |
| Total Capacity Projects | 66 | 168 | 87 | 69 | 122 | 82 | 42 | 2 | 638 | | | | | |
| | | | | | | | | | | | | | | |
| Projects Not Adding Capacity | FY 23-24 | FY 24-25 | FY 25-26 | FY 26-27 | FY 27-28 | FY 28-29 | FY 29-30 | FY 30-31 | Total | Potential Funding Source | | | | |
| | | | | | | | | | | Bonds | Levy | SCAP | Impact | Future |
| Kenmore | 6 | 15 | 10 | 2 | | | | | 33 | X | | | | |
| Building Improvement | 6 | 6 | 6 | 6 | 6 | 6 | 6 | 6 | 48 | X | | | | X |
| Technology | 3 | 3 | 3 | 3 | 3 | 3 | 3 | 3 | 24 | X | X | | | X |
| Fields/Inclusive Learning | 3 | 3 | 3 | 3 | 3 | 3 | 3 | 3 | 24 | X | X | | | X |
| Code Compliance/Small Works | 4 | 4 | 4 | 4 | 4 | 4 | 4 | 4 | 32 | X | | | | X |
| Site Purchase/Circulation | 1 | 1 | 1 | 1 | 1 | 1 | 1 | 1 | 8 | X | | | | X |
| Overhead/Bond Expense | 3 | 3 | 4 | 3 | 3 | 3 | 4 | 3 | 26 | X | X | | | X |
| Security | 3 | 3 | 3 | 3 | 3 | 3 | 3 | 3 | 24 | X | | | | X |
| Total Non-Capacity Projects | 29 | 38 | 34 | 25 | 23 | 23 | 24 | 23 | 219 | | | | | |
| | | | | | | | | | | | | | | |
| Total All Projects | 95 | 206 | 121 | 94 | 145 | 105 | 66 | 25 | 857 | | | | | |

Impact Fees

Section 7

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 NSD 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 NSD, there was still ample capacity in the southeast area of the District. Because of the statutes and ordinances governing school district eligibility criteria to be able to collect school impact fees, NSD 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 2023 CFP and are collecting impact fees identified in that plan. Snohomish County adopted the District's 2022 CFP and is collecting impact fees associated with that plan and will continue to do so until the County's 2024 update cycle. We anticipate all the above jurisdictions to consider and adopt this 2024 CFP as part of their regular budget cycle.

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 NSD's growth-related needs, are used in the calculation

A student yield 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 units, townhomes, and multi-family dwelling units). 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. NSD updated its student factor for single family, multi-family, and townhome units in early 2023. The student factor analysis for NSD is included in

Appendix A. The student factors in Appendix A 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. As available land for single family development is beginning to be constrained, and multi-family development – most notably townhomes, is increasing, we anticipate continued growth 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. NSD is requesting that each jurisdiction, if necessary, 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 B**.

Despite the changes mentioned, we continue with our current student generation rate. We have planned to conduct a recalculation next year, which aligns with our ongoing assessment of regional development and student distribution patterns.

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.

NSD 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 NSD.

The impact fees requested in this year’s Capital Facilities Plan are based on representative growth-related capacity projects at Crystal Springs, Fernwood, and Woodin Elementary Schools (total added capacity of 655) and capacity additions at Bothell and North Creek High Schools (total added capacity of 268). Construction costs, before tax, are used in the fee formula. Growth related capacity projects identified in **Table 6.1** are eligible for impact fee funding.

[Proposed School Impact Fees](#)
Snohomish County

| | |
|--------------------------------------|----------|
| Single Family Units | \$15,159 |
| Townhome Units | \$5,414 |
| Multi-Family Units – 2+ Bedrooms | \$254 |
| Multi-Family Units – 1/less Bedrooms | \$0 |

[Proposed School Impact Fees](#)
City of Woodinville

| | |
|----------------------------------|----------|
| Single Family Units | \$15,159 |
| Townhome Units | \$5,414 |
| Multi-Family Units – 2+ Bedrooms | \$254 |

[Proposed School Impact Fees](#)
King County, City of Bothell, City of Kenmore

| | |
|--------------------------------------|----------|
| Single Family Units | \$15,159 |
| Multi-Family Units (incl. Townhomes) | \$2,755 |

School impact fee rates stated above reflect a discount of 50% as required by the King County and Snohomish County codes.

Factors for Impact Fee Calculations

Student Generation Factors: Single Family

| | |
|------------|-------|
| Elementary | 0.324 |
| Middle | 0.118 |
| High | 0.120 |
| K-12 | 0.562 |

Student Generation Factors: Multi-Family (Townhomes/Condos/Apartments)

| | |
|------------|-------|
| Elementary | 0.071 |
| Middle | 0.027 |
| High | 0.034 |
| K-12 | 0.132 |

Student Generation Factors: Townhomes

| | |
|------------|-------|
| Elementary | 0.171 |
| Middle | 0.050 |
| High | 0.048 |
| K-12 | 0.270 |

Student Generation Factors: Condos/Apartments

| | |
|------------|-------|
| Elementary | 0.031 |
| Middle | 0.015 |
| High | 0.020 |
| K-12 | 0.066 |

Projected New Capacity (bolded projects in fee formula)

| | |
|-----------------------------------|--------------|
| Inglemoor High School – Phase 1 | (185) |
| North Creek High School | (108) |
| Bothell High School | (160) |
| Leota Middle School – Phase 1 | (159) |
| Fernwood Elementary | (330) |
| Crystal Springs Elementary | (175) |
| Maywood Hills Elementary | (125) |
| Woodin Elementary | (150) |

Capacity/Construction Costs (in millions) (bolded projects in fee formula)

| | |
|-----------------------------------|---------------|
| Inglemoor High School - Phase 1 | \$100.0 |
| North Creek High School | \$6.0 |
| Bothell High School | \$6.0 |
| Leota Middle School - Phase 1 | \$62.0 |
| Fernwood Elementary | \$37.8 |
| Crystal Springs Elementary | \$36.5 |
| Maywood Hills Elementary | \$49.4 |
| Woodin Elementary | \$32.0 |

Capacity/New Property Costs

\$0.00

Temporary Facility Capacity Costs

\$0.00

(Portable costs not included in the formula)

Permanent Facility Square Footage

94.55%

Temporary Facility Square Footage

5.45%

School Construction Assistance Program Credit

Current SCAP percentage 38.11%

Current Construction Cost Allocation \$375.00

OSPI Sq/Ft/Student

ES: 90

MS: 108

HS: 130

Tax Payment Credit

Single Family AAV \$960,260

Multi-Family Unit AAV \$329,512

Debt Service Rate

Current/\$1,000 \$1.29225

GO Bond Interest Rate – Bond Buyer Index

Avg – March 2024 3.48%

Developer Provided Sites/Facilities

None

APPENDIX A

Student Generation Factors from New Development

All Units Constructed 2017 - 2021 (5 years)

| | Single Family | Townhomes | Multi-Family (Townhomes/ Condos/Apts) | Multi-Family (Condos/Apts) |
|-------------|---------------|--------------|---|-------------------------------|
| K-5 | 0.324 | 0.171 | 0.071 | 0.031 |
| 6-8 | 0.118 | 0.050 | 0.027 | 0.015 |
| 9-12 | 0.120 | 0.048 | 0.034 | 0.020 |
| K-12 | 0.562 | 0.269 | 0.132 | 0.066 |

Student Generation Rates for the Northshore School District (January 2023)

Permit Years: 2017 to 2021

| | Rates for Different Unit Types | | | | Single and Multi-family Rate Summary | | | | | |
|-------------|--------------------------------|---------------|-------------|-------------|--------------------------------------|---------|-------|-------|-------|-------|
| | SF | MF/Apartments | Townhomes | Duplexes | Permit Counts | Permits | K-5 | 6-8 | 9-12 | Total |
| K-5 | 0.32 | 0.03 | 0.17 | 0.23 | SF All | 2056 | 0.32 | 0.12 | 0.12 | 0.56 |
| 6-8 | 0.12 | 0.02 | 0.05 | 0.14 | MF Units (all) | 2027 | 0.071 | 0.027 | 0.034 | 0.13 |
| 9-12 | 0.12 | 0.02 | 0.05 | 0.29 | | | | | | |
| | 0.56 | 0.07 | 0.27 | 0.65 | | | | | | |

Written Summary

56 students for every 100 single family homes

7 students for every 100 apartment units

27 students for every 100 townhome units

65 students for every 100 Duplex units

(please note -- there are very few duplex units so the sample may not be representative)

Methodology

Permit addresses were compared to the addresses for students enrolled in October 2022 to create the rates.

Student Generation Rates by Grade

| GRADE | SF Units Students Generated | SF Generation Rate |
|--------------|-----------------------------|--------------------|
| K | 123 | 0.060 |
| 1 | 121 | 0.059 |
| 2 | 104 | 0.051 |
| 3 | 116 | 0.056 |
| 4 | 112 | 0.054 |
| 5 | 91 | 0.044 |
| 6 | 89 | 0.043 |
| 7 | 75 | 0.036 |
| 8 | 78 | 0.038 |
| 9 | 64 | 0.031 |
| 10 | 69 | 0.034 |
| 11 | 58 | 0.028 |
| 12 | 56 | 0.027 |
| <i>Total</i> | <i>1156</i> | <i>0.562</i> |

*** Grades K-12 Only (Preschoolers Excluded)**

Apartment Student Generation Rates by Grade

| GRADE | MF Units Students Generated** | MF Generation Rate |
|--------------|-------------------------------|--------------------|
| K | 11 | 0.007 |
| 1 | 11 | 0.007 |
| 2 | 4 | 0.003 |
| 3 | 9 | 0.006 |
| 4 | 6 | 0.004 |
| 5 | 4 | 0.003 |
| 6 | 4 | 0.003 |
| 7 | 12 | 0.008 |
| 8 | 6 | 0.004 |
| 9 | 11 | 0.007 |
| 10 | 7 | 0.005 |
| 11 | 10 | 0.007 |
| 12 | 2 | 0.001 |
| Total | 97 | 0.066 |

Duplex Student Generation Rates by Grade

| GRADE | MF Units Students Generated** | MF Generation Rate |
|--------------|-------------------------------|--------------------|
| K | 2 | 0.038 |
| 1 | 5 | 0.096 |
| 2 | 1 | 0.019 |
| 3 | 1 | 0.019 |
| 4 | 0 | 0.000 |
| 5 | 3 | 0.058 |
| 6 | 3 | 0.058 |
| 7 | 1 | 0.019 |
| 8 | 3 | 0.058 |
| 9 | 3 | 0.058 |
| 10 | 6 | 0.115 |
| 11 | 4 | 0.077 |
| 12 | 2 | 0.038 |
| Total | 34 | 0.654 |

Townhome Student Generation Rates by Grade

| GRADE | MF Units Students Generated** | MF Generation Rate |
|--------------|-------------------------------|--------------------|
| K | 16 | 0.032 |
| 1 | 16 | 0.032 |
| 2 | 22 | 0.044 |
| 3 | 9 | 0.018 |
| 4 | 11 | 0.022 |
| 5 | 12 | 0.024 |
| 6 | 14 | 0.028 |
| 7 | 5 | 0.010 |
| 8 | 6 | 0.012 |
| 9 | 8 | 0.016 |
| 10 | 7 | 0.014 |
| 11 | 4 | 0.008 |
| 12 | 5 | 0.010 |
| Total | 135 | 0.268 |

* Includes MF Units classified by the jurisdiction as Apartment, Duplex, or Townhome

** Grades K-12 Only (Preschoolers Excluded)

APPENDIX B.1

School Impact Fee Calculation: **Single Family Dwelling Unit**
Northshore School District, 2024 CFP

| School Site Acquisition Cost: | Site Size Acreage | Cost/Acre | Facility Size | Site Cost/Student | Student Factor | Cost/SFDU |
|--------------------------------------|-------------------|-----------|---------------|-------------------|----------------|------------|
| Elementary | 0 | \$0 | 1 | \$0 | 0.324 | \$0 |
| Middle | 0 | \$0 | 1 | \$0 | 0.118 | \$0 |
| Senior | 0 | \$0 | 1 | \$0 | 0.120 | \$0 |
| TOTAL | | | | | | \$0 |

| School Construction Cost: | Sq. Ft. % Permanent | Facility Cost | Facility Size | Bldg. Cost/Student | Student Factor | Cost/SFDU |
|----------------------------------|---------------------|---------------|---------------|--------------------|----------------|-----------------|
| Elementary | 94.55% | \$90,880,000 | 655 | \$138,748 | 0.324 | \$42,504 |
| Middle | 94.55% | \$0 | - | \$0 | 0.118 | \$0 |
| Senior | 94.55% | \$10,725,000 | 268 | \$40,019 | 0.120 | \$4,541 |
| TOTAL | | | | | | \$47,045 |

| Temporary Facility Cost: | Sq. Ft. % Temporary | Facility Cost | Facility Size | Bldg. Cost/Student | Student Factor | Cost/SFDU |
|---------------------------------|---------------------|---------------|---------------|--------------------|----------------|------------|
| Elementary | 5.45% | \$0 | 25 | \$0 | 0.324 | \$0 |
| Middle | 5.45% | \$0 | 25 | \$0 | 0.118 | \$0 |
| Senior | 5.45% | \$0 | 25 | \$0 | 0.120 | \$0 |
| TOTAL | | | | | | \$0 |

| State School Construction Funding Assistance Credit: | Const Cost Allocation | OSPI Sq. Ft./Student | Funding Assistance | Credit/Student | Student Factor | Cost/SFDU |
|---|-----------------------|----------------------|--------------------|----------------|----------------|----------------|
| Elementary | \$375 | 90 | 38.11% | \$12,862 | 0.324 | \$4,167 |
| Middle | \$0 | 0 | 0.00% | \$0 | 0.118 | \$0 |
| Senior | \$375 | 130 | 38.11% | \$18,579 | 0.120 | \$2,229 |
| TOTAL | | | | | | \$6,397 |

School Impact Fee Calculation: **Single Family Dwelling Unit**
 Page 2

Tax Payment Credit Calculation:

| | |
|----------------------------------|---------------|
| Average SFR Assessed Value | \$ 960,260.44 |
| Current Capital Levy Rate/\$1000 | \$1.29225 |
| Annual Tax Payment | \$1,240.90 |
| Years Amortized | 10 |
| Current Bond Interest Rate | 3.48% |
| Present Value of Revenue Stream | \$10,330 |

Impact Fee Summary - Single Family Dwelling Unit:

| | |
|-------------------------|------------|
| Site Acquisition Cost | \$0 |
| Permanent Facility Cost | \$47,045 |
| Temporary Facility Cost | \$0 |
| State SCFA Credit | (\$6,397) |
| Tax Payment Credit | (\$10,330) |
| Unfunded Need | \$30,318 |
| 50% Required Adjustment | \$15,1591 |

| | |
|---------------------------------|-----------------|
| Single Family Impact Fee | \$15,159 |
|---------------------------------|-----------------|

APPENDIX B.2

School Impact Fee Calculation: **Townhome Dwelling Unit** Northshore School District, 2024 CFP

| School Site Acquisition Cost: | Site Size Acreage | Cost/Acre | Facility Size | Site Cost/Student | Student Factor | Cost/THDU |
|--------------------------------------|-------------------|-----------|---------------|-------------------|----------------|------------|
| Elementary | 0 | \$0 | 1 | \$0 | 0.171 | \$0 |
| Middle | 0 | \$0 | 1 | \$0 | 0.050 | \$0 |
| Senior | 0 | \$0 | 1 | \$0 | 0.048 | \$0 |
| TOTAL | | | | | | \$0 |

| School Construction Cost: | Sq. Ft. % Permanent | Facility Cost | Facility Size | Bldg. Cost/Student | Student Factor | Cost/THDU |
|----------------------------------|---------------------|---------------|---------------|--------------------|----------------|-----------------|
| Elementary | 94.55% | \$90,880,000 | 655 | \$138,748 | 0.171 | \$22,433 |
| Middle | 94.55% | \$0 | - | \$0 | 0.050 | \$0 |
| Senior | 94.55% | \$10,725,000 | 268 | \$40,019 | 0.048 | \$1,816 |
| TOTAL | | | | | | \$24,249 |

| Temporary Facility Cost: | Sq. Ft. % Temporary | Facility Cost | Facility Size | Bldg. Cost/Student | Student Factor | Cost/THDU |
|---------------------------------|---------------------|---------------|---------------|--------------------|----------------|------------|
| Elementary | 5.45% | \$0 | 25 | \$0 | 0.171 | \$0 |
| Middle | 5.45% | \$0 | 25 | \$0 | 0.050 | \$0 |
| Senior | 5.45% | \$0 | 25 | \$0 | 0.048 | \$0 |
| TOTAL | | | | | | \$0 |

| State School Construction Funding Assistance Credit: | Const Cost Allocation | OSPI Sq. Ft./Student | Funding Assistance | Credit/Student | Student Factor | Cost/THDU |
|---|-----------------------|----------------------|--------------------|----------------|----------------|----------------|
| Elementary | \$375 | 90 | 38.11% | \$12,862 | 0.171 | \$2,199 |
| Middle | \$0 | 0 | 0.00% | \$0 | 0.050 | \$0 |
| Senior | \$375 | 130 | 38.11% | \$18,579 | 0.048 | \$892 |
| TOTAL | | | | | | \$3,091 |

School Impact Fee Calculation: **Townhome Dwelling Unit**
Page 2

Tax Payment Credit Calculation:

| | | |
|----------------------------------|----|-----------|
| Average SFR Assessed Value | \$ | 960,260 |
| Current Capital Levy Rate/\$1000 | | \$1.29225 |
| Annual Tax Payment | | \$1,241 |
| Years Amortized | | 10 |
| Current Bond Interest Rate | | 3.48% |
| Present Value of Revenue Stream | | \$10,330 |

Impact Fee Summary - Townhome Dwelling Unit:

| | | |
|-------------------------|--|------------|
| Site Acquisition Cost | | \$0 |
| Permanent Facility Cost | | \$24,249 |
| Temporary Facility Cost | | \$0 |
| State SCFA Credit | | (\$3,091) |
| Tax Payment Credit | | (\$10,330) |
| Unfunded Need | | \$10,827 |
| 50% Required Adjustment | | \$5,414 |

| | |
|----------------------------|----------------|
| Townhome Impact Fee | \$5,414 |
|----------------------------|----------------|

APPENDIX B.3

School Impact Fee Calculation: Multi-Family Dwelling Unit (Townhome, Apartment, Condo blend) Northshore School District, 2024 CFP

| School Site Acquisition Cost: | Site Size Acreage | Cost/Acre | Facility Size | Site Cost/Student | Student Factor | Cost/SFDU |
|--------------------------------------|-------------------|-----------|---------------|-------------------|----------------|------------|
| Elementary | 0 | \$0 | 1 | \$0 | 0.071 | \$0 |
| Middle | 0 | \$0 | 1 | \$0 | 0.027 | \$0 |
| Senior | 0 | \$0 | 1 | \$0 | 0.034 | \$0 |
| TOTAL | | | | | | \$0 |

| School Construction Cost: | Sq. Ft. % Permanent | Facility Cost | Facility Size | Bldg. Cost/Student | Student Factor | Cost/MFDU |
|----------------------------------|---------------------|---------------|---------------|--------------------|----------------|-----------------|
| Elementary | 94.55% | \$90,880,000 | 655 | \$138,748 | 0.071 | \$9,314 |
| Middle | 94.55% | \$0 | - | \$0 | 0.027 | \$0 |
| Senior | 94.55% | \$10,725,000 | 268 | \$40,019 | 0.034 | \$1,286 |
| TOTAL | | | | | | \$10,601 |

| Temporary Facility Cost: | Sq. Ft. % Temporary | Facility Cost | Facility Size | Bldg. Cost/Student | Student Factor | Cost/MFDU |
|---------------------------------|---------------------|---------------|---------------|--------------------|----------------|------------|
| Elementary | 5.45% | \$0 | 25 | \$0 | 0.071 | \$0 |
| Middle | 5.45% | \$0 | 25 | \$0 | 0.027 | \$0 |
| Senior | 5.45% | \$0 | 25 | \$0 | 0.034 | \$0 |
| TOTAL | | | | | | \$0 |

| State School Construction Funding Assistance Credit: | Const Cost Allocation | OSPI Sq. Ft./Student | Funding Assistance | Credit/Student | Student Factor | Cost/MFDU |
|---|-----------------------|----------------------|--------------------|----------------|----------------|----------------|
| Elementary | \$375 | 90 | 38.11% | \$12,862 | 0.071 | \$913 |
| Middle | \$0 | 0 | 0.00% | \$0 | 0.027 | \$0 |
| Senior | \$375 | 130 | 38.11% | \$18,579 | 0.034 | \$632 |
| TOTAL | | | | | | \$1,545 |

School Impact Fee Calculation: **Multi-Family Dwelling Unit**
(Townhome, Apartment, Condo blend)
 Page 2

Tax Payment Credit Calculation:

| | | |
|----------------------------------|----|-----------|
| Average MFR Assessed Value | \$ | 329,512 |
| Current Capital Levy Rate/\$1000 | | \$1.29225 |
| Annual Tax Payment | | \$425.81 |
| Years Amortized | | 10 |
| Current Bond Interest Rate | | 3.48% |
| Present Value of Revenue Stream | | \$3,545 |

Impact Fee Summary - Multi-Family Dwelling Unit:

| | | |
|-------------------------|--|-----------|
| Site Acquisition Cost | | \$0 |
| Permanent Facility Cost | | \$10,601 |
| Temporary Facility Cost | | \$0 |
| State SCFA Credit | | (\$1,545) |
| Tax Payment Credit | | (\$3,545) |
| Unfunded Need | | \$5,511 |
| 50% Required Adjustment | | \$2,755 |

| | |
|----------------------------------|----------------|
| Multi-Family Impact Fee | \$2,755 |
| (Townhomes, Apts, Condos) | |

APPENDIX B.4

School Impact Fee Calculation: **Multi-Family Dwelling Unit (Apartment, Condo blend)** Northshore School District, 2024 CFP

| School Site Acquisition Cost: | Site Size Acreage | Cost/Acre | Facility Size | Site Cost/Student | Student Factor | Cost/MFDU |
|--------------------------------------|-------------------|-----------|---------------|-------------------|----------------|------------|
| Elementary | 0 | \$0 | 1 | \$0 | 0.0310 | \$0 |
| Middle | 0 | \$0 | 1 | \$0 | 0.0150 | \$0 |
| Senior | 0 | \$0 | 1 | \$0 | 0.0200 | \$0 |
| TOTAL | | | | | | \$0 |

| School Construction Cost: | Sq. Ft. % Permanent | Facility Cost | Facility Size | Bldg. Cost/Student | Student Factor | Cost/MFDU |
|----------------------------------|---------------------|---------------|---------------|--------------------|----------------|----------------|
| Elementary | 94.55% | \$90,880,000 | 655 | \$138,748 | 0.0310 | \$4,067 |
| Middle | 94.55% | \$0 | - | \$0 | 0.0150 | \$0 |
| Senior | 94.55% | \$10,725,000 | 268 | \$40,019 | 0.0200 | \$757 |
| TOTAL | | | | | | \$4,824 |

| Temporary Facility Cost: | Sq. Ft. % Temporary | Facility Cost | Facility Size | Bldg. Cost/Student | Student Factor | Cost/MFDU |
|---------------------------------|---------------------|---------------|---------------|--------------------|----------------|------------|
| Elementary | 5.45% | \$0 | 25 | \$0 | 0.0310 | \$0 |
| Middle | 5.45% | \$0 | 0 | \$0 | 0.0150 | \$0 |
| Senior | 5.45% | \$0 | 25 | \$0 | 0.0200 | \$0 |
| TOTAL | | | | | | \$0 |

| State School Construction Funding Assistance Credit: | Const Cost Allocation | OSPI Sq. Ft./Student | Funding Assistance | Credit/Student | Student Factor | Cost/MFDU |
|---|-----------------------|----------------------|--------------------|----------------|----------------|--------------|
| Elementary | \$375 | 90 | 38.11% | \$12,862 | 0.0310 | \$399 |
| Middle | \$0 | 0 | 0.00% | \$0 | 0.0150 | \$0 |
| Senior | \$375 | 130 | 38.11% | \$18,579 | 0.0200 | \$372 |
| TOTAL | | | | | | \$770 |

School Impact Fee Calculation: **Multi-Family Dwelling Unit**
(Apartment, Condo blend)
 Page 2

Tax Payment Credit Calculation:

| | |
|----------------------------------|------------|
| Average MFR Assessed Value | \$ 329,512 |
| Current Capital Levy Rate/\$1000 | \$1.29225 |
| Annual Tax Payment | \$425.81 |
| Years Amortized | 10 |
| Current Bond Interest Rate | 3.48% |
| Present Value of Revenue Stream | \$3,545 |

Impact Fee Summary - Multi-Family Dwelling Unit:

| | |
|-------------------------|-----------|
| Site Acquisition Cost | \$0 |
| Permanent Facility Cost | \$4,824 |
| Temporary Facility Cost | \$0 |
| State SCFA Credit | (\$770) |
| Tax Payment Credit | (\$3,545) |
| Unfunded Need | \$508 |
| 50% Required Adjustment | \$254 |

| | |
|--|--------------|
| Multi-Family Impact Fee (Apts/Condos) | \$254 |
|--|--------------|

Snohomish School District

1601 Avenue D
Snohomish, Washington 92890
(360) 563-7239

CAPITAL FACILITIES PLAN
2024 – 2029

Adopted July 24, 2024

Snohomish School District

CAPITAL FACILITIES PLAN

Board of Directors

Josh Seek, President

Jay Hagen, Vice President

Shaunna Ballas

Sherri Larkin

Rob Serviss

Superintendent

Dr. Kent Kultgen

For information on the Snohomish School District Facilities Plan,
contact the Business Office at (360) 563-7240.

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SECTION 1: INTRODUCTION

Purpose of the Capital Facilities Plan

The purpose of this report is to update the Capital Facilities Plan (CFP) for the Snohomish School District pursuant to the Washington State Growth Management Act (GMA). The GMA includes schools in the category of public facilities and services. School districts have adopted capital facilities plans to satisfy the requirements of the GMA and to identify additional school facilities necessary to meet the educational needs of the growing student populations anticipated in their districts.

This CFP is intended to provide the Snohomish School District (District), Snohomish County and other jurisdictions a description of the facilities needed to accommodate projected student enrollment at acceptable levels of service, including a detailed schedule and financing program for capital improvements, over the six year period of 2024-2029.

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 2022 GMA-based CFP that was adopted by the District and the County in 2022.

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 9,192¹ students in kindergarten through grade 12. The City of Snohomish has a population of approximately 10,126² people while the County encompasses a larger population of approximately 827,957³ people. The District is located 35 miles north of Seattle in the heart of the Puget Sound region of Washington.

The District has preschool, Transition to Kindergarten, and Early Childhood Education and Assistance Program (ECEAP) programs, nine elementary schools (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

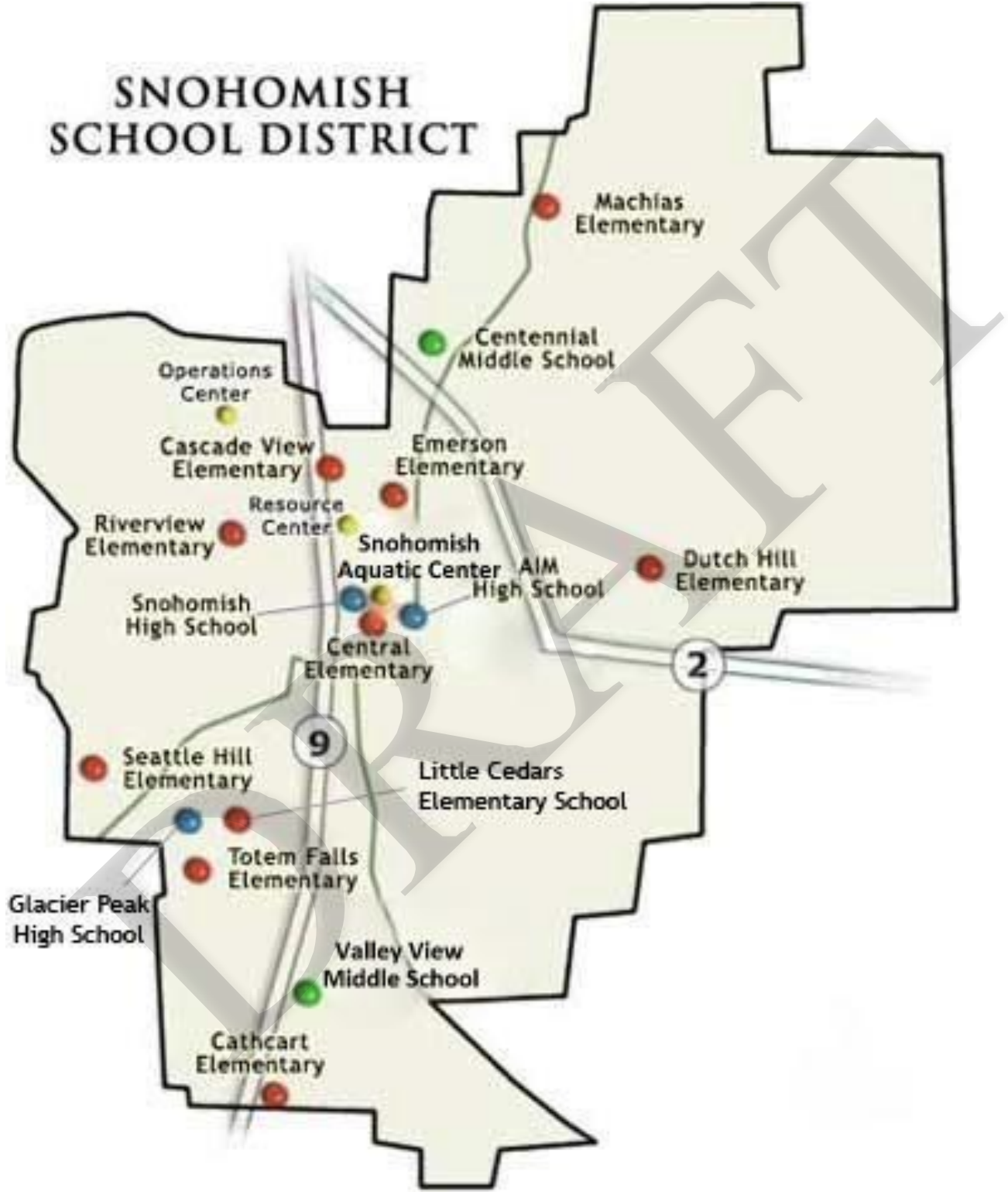
¹ October 1, 2023 FTE. Unless otherwise noted, all enrollment and student capacity data in this CFP is expressed in terms of FTE (full time equivalent).

² 2020 United States Census Bureau data

³ 2044 GMA Population Forecasts by School District – Adopted in the Snohomish County Countywide Planning Policies Appendix B (February 23, 2022).

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 DISTRICT¹



¹ 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 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 MLL 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 2021-22 and 2022-23, the District’s compliance with the minimum educational service standards (as applicable for those years) is 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 |
| *Snohomish No. 201 | 35 | 21.22 | 35 | 15.79 | 40 | 21.42 |

| 2022-23 School Year | | | | | | |
|---------------------|-------------------------------|-------------------------------|--------------------------|---------------------------|------------------------|-------------------------|
| LOS Standard | MINIMUM LOS# Elementary | REPORTED LOS Elementary | MINIMUM LOS Middle | REPORTED LOS Middle | MINIMUM LOS High | REPORTED LOS High |
| *Snohomish No. 201 | 35 | 21.92 | 35 | 15.19 | 40 | 20.98 |

*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 of District facilities is provided as Figure 1.

Schools

The District currently has nine (9) elementary schools (K-6), two (2) middle schools (grades 7-8), and three high schools (grades 9-12) (AIM High School, Parent Partnership and the District’s Transition program housed in the Parkway Campus). 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. Central Primary Campus, which used to house grades K-2 until they were moved to Emerson Elementary in 2024, currently houses only ECEAP.

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 | 14 | 359 | 413 | 1990 | yes |
| Cathcart | 12.8 | 36,231 | 18 | 420 | 474 | 1994 | yes |
| Central Primary | 4.5 | 45,239 | 0(4) | 204 | 204 | 1994 | yes |
| Dutch Hill | 13.9 | 42,357 | 20 | 356 | 626 | 1985 | yes |
| Emerson | 6.9 | 40,038 | 19 | 375 | 375 | 1989 | yes |
| Little Cedars | 11.3 | 76,071 | 26 | 621 | 711 | 2007 | yes |
| Machias | 9.2 | 78,137 | 25 | 481 | 526 | 2011 | yes |
| Riverview | 9.6 | 78,740 | 21 | 515 | 542 | 2011 | no |
| Seattle Hill | 9.7 | 42,357 | 19 | 405 | 666 | 1982 | yes |
| Totem Falls | 10.0 | 44,877 | 17 | 376 | 376 | 1991 | yes |
| Total | | 529,676 | | 4,112 | 4,913 | | |

(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

(4) Central Elementary School will not have any K-6 students for the 2024-25 school year

**Table 2
Middle School Capacity Inventory**

| Middle School | Site Size (acres) | Bldg Area (Sq. Ft.) | Teaching Stations(1) | Permanent Capacity (2) | Capacity with Portables | Year Built or Last Remodel | Potential for Expansion of Perm. Facility (3) |
|----------------------|--------------------------|----------------------------|-----------------------------|-------------------------------|--------------------------------|-----------------------------------|--|
| Centennial | 19.3 | 123,744 | 45 | 900 | 900 | 2011 | yes |
| Valley View | 38.6 | 168,725 | 45 | 950 | 950 | 2012 | yes |
| Total | | 292,469 | | 1,850 | 1,850 | | |

(1) The number of teaching stations includes stations used for teacher planning periods. Therefore, the permanent capacity figure is adjusted to reflect that each teaching station is only used for regular student instruction for a portion of the total school day.

(2) Permanent Student Capacity figure is exclusive of Portables.

(3) Potential for expansion is based on the size of existing site and assumes that the District could obtain land use approvals/permits for such expansion. The analysis does not take into consideration the possibility of acquiring adjacent property

**Table 3
High School Capacity Inventory**

| High School | Site Size (acres) | Bldg Area (Sq. Ft.) | Teaching Stations (1) | Permanent Capacity (2) | Capacity with Portables | Year Built or Last Remodel | Potential for Expansion of Perm. Facility (3) |
|--------------------|--------------------------|----------------------------|------------------------------|-------------------------------|--------------------------------|-----------------------------------|--|
| Snohomish H.S. | 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 |
| Total | | 529,191 | | 3,400 | 3,592 | | |

(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 70 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 | |
| ELEMENTARY: | | | |
| Cascade View | 3 | 2 | 81 |
| Cathcart | 2 | 5 | 54 |
| Central Primary | 0 | 2 | 0 |
| Dutch Hill | 12 | 2 | 324 |
| Emerson | 3 | 1 | 81 |
| Machias | 4 | | 108 |
| Riverview | | 2 | 0 |
| Seattle Hill | 8 | 3 | 216 |
| Totem Falls | 4 | 2 | 108 |
| Little Cedars | 3 | 4 | 81 |
| Total | 39 | 23 | 1,053 |
| MIDDLE: | | | |
| Centennial | 0 | 0 | 0 |
| Valley View | 0 | 0 | 0 |
| Total | 0 | 0 | 0 |
| HIGH | | | |
| Snohomish | 0 | 0 | 0 |
| Glacier Peak | 4 | 4 | 108 |
| Total | 4 | 4 | 108 |
| GRAND TOTAL | 43 | 27 | 1,161 |

Each portable classroom is approximately 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

| Facility Name | Building Area (Sq. Ft.) | Site Size (Acres) |
|--------------------------------|------------------------------------|------------------------------|
| Operations Center | 19,873 | 6.3 |
| Resource and Service Center | 22,296 | 6.0 |
| Parkway Campus | 9,536* | 3.25 |
| District 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. Enrollment in the 2020-21 and 2021-22 school years declined due to the impacts of COVID-19 pandemic on available school service models and related uncertainties. The district anticipates enrollment to rebound during the duration of this plan and return and exceed levels projected by our third-party demographer pre-COVID. See additional information below.

The October 1, 2023 HC enrollment was 9,373 (with 9,192 FTE students). See Appendix A. 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 Office of the Superintendent of Public Instruction prepares cohort survival projections based upon historical enrollment trends. The OSPI projections are limited in that they fail to account for development fluctuations and other anomalies such as the COVID-19 pandemic. The OSPI projections also utilize a headcount factor that misrepresents students in Snohomish School District facilities. See Appendix A-1.

The District utilizes a third party demographer, FLO Analytics, for forecasting future enrollments. This methodology, a modified cohort survival method, considers historic enrollment, economic trends, housing projections and birth rates, among other factors. Based upon this analysis, the District expects enrollment to grow over the six year planning period to a total FTE student population of 9,694, or an increase of 5.461%. See Appendix A-2.

OFM population-based enrollment projections were estimated for the District using OFM population forecasts for the County. In 2020, the District's enrollment constituted approximately 15.69% of the District's total population. Assuming that, between 2024 and 2029, the District's enrollment will continue to constitute 15.69% of the District's population, using OFM/County data, the District projects a total enrollment of 10,224 students in 2029. See Table 6.

| Table 6 | | | | | | | | | |
|---|--------------------------|-------------|-------------|-------------|-------------|-------------|-------------|---|---|
| Comparison of Student Enrollment Projections 2023-2029 | | | | | | | | | |
| Projection | October 2023* | 2024 | 2025 | 2026 | 2027 | 2028 | 2029 | Projected Change 2023-2029 | Percent Change 2023-2029 |
| County/OFM** | 9,192 | 9,364 | 9,536 | 9,708 | 9,880 | 10,052 | 10,224 | 1,032 | 11.23% |
| District | 9,192 | 9,215 | 9,251 | 9,322 | 9,402 | 9,582 | 9,694 | 502 | 5.461% |
| Total Population Projection for District (OFM) | | | | | | | 65,167 | | |
| Student to Population Ratio | 15.69% | | | | | | | | |

*Actual Oct 2023 FTE

**Based on 2044 GMA Population Forecasts by School District (information provided by Snohomish County).

The District uses the FLO Analytics 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, as well as factors in pandemic-related anomalies. 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.

2044 Enrollment Projections

Student enrollment projections beyond the 2029 school year are highly speculative. Using OFM/County data as a base, the District projects a 2044 student population of 11,374. This assumes that the District’s enrollment will continue to constitute 15.69% of the District’s total population through 2044.

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
2044

| Grade Span | FTE Enrollment – October 2023 | Projected Enrollment 2044** |
|---------------------|----------------------------------|-----------------------------|
| Elementary (K-6) | 4,708 | 5,801 |
| Middle School (7-8) | 1,376 | 1,706 |
| High School (9-12) | 3,108 | 3,867 |
| TOTAL (K-12) | 9,192 | 11,374 |

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

**The 2044 enrollment projections assume that the percentage of students per grade level will remain consistent between 2023 and 2044.

SECTION 5: CAPITAL FACILITIES NEEDS

Facility Needs (2024-2029)

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 (2024-2029).

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 permanent capacity existing in 2021. This table shows actual permanent space needs and the portion of those needs that are “growth related” for the years 2024-2029. Importantly, capacity needs existing as of the 2021 base year include impacts from recent growth within the District and should also be considered as growth-related.

**Table 8
Additional Capacity Needs
2024-2029**

| Grade Span | 2023* | 2024 | 2025 | 2026 | 2027 | 2028 | 2029 | Pct. Growth Related |
|----------------------------|-------|------|------|------|------|------|------|---------------------|
| Elementary (K-6) | | | | | | | | |
| Total | 596** | 702 | 725 | 793 | 821 | 856 | 881 | |
| Growth Related | | 106 | 129 | 197 | 225 | 260 | 285 | 32.35% |
| Middle School (7-8) | | | | | | | | |
| Total | --- | --- | --- | --- | --- | --- | --- | |
| Growth Related | -- | -- | -- | -- | -- | -- | -- | --% |
| High School | | | | | | | | |
| Total | --- | --- | --- | --- | --- | --- | --- | |
| Growth Related | -- | -- | -- | -- | -- | -- | -- | --% |

* Actual 2023 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 (2028-2029), additional permanent classroom capacity will be needed as follows:

**Table 9
Estimated Unhoused Students (2029-2030)***

| Grade Span | Unhoused Students (Post-2023 Growth Related) | Unhoused Students (Pre-2021 Existing and Recent-Growth Related) |
|----------------------------------|---|--|
| Elementary (K-6) | 285 | 881 |
| Middle School (7-8) | -- | -- |
| High School (9-12) | -- | -- |
| TOTAL UNHOUSED (K-12) | 285 | 881 |

*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 and opened at the new capacity in January of 2011.

This CFP includes planning for classroom additions as a part of replacement projects at three elementary schools (Cathcart, Dutch Hill, and Seattle Hill) to address growth-related needs. The District is also considering replacement/addition projects at other elementary schools in the future (likely 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.

Interim Classroom Facilities

The District added two portable classrooms at Dutch Hill in the summer of 2022 and a portable restroom in 2023. It may purchase additional 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 PLAN

Funding of school facilities is typically secured from a number of sources including voter-approved bonds, State matching funds and development impact fees. Each of these 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 Program (SCAP) 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 53.42% percentage level (July 2024 release). The current Construction Cost Allowance, the maximum cost per square foot recognized for SCAP funding, is set in the State's biennial budget and is currently \$375.00/eligible square foot.

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 2024-2029. 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 three elementary schools, 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)

| | 2024 | 2025 | 2026 | 2027 | 2028 | 2029 | Total Cost* | Bond/Levy/ Impact Fee | State Match | Other | Added Capacity | Growth Related |
|--|---------|-------|-------|-------|----------|----------|-------------|--------------------------|-------------|-------|-------------------|-------------------|
| Dutch Hill Elementary Replacement/Addition | | | | | \$46,300 | \$37,000 | \$83,300 | X | X | | X | X |
| Cathcart Elementary Replacement/Addition | | | | | \$45,000 | \$34,700 | \$79,700 | X | X | | X | X |
| Seattle Hill Elementary Replacement | | | | | \$45,000 | \$34,700 | \$79,700 | X | X | | X | X |
| District wide Capital Improvements (including portables) | \$1,000 | \$300 | \$500 | \$500 | \$500 | \$500 | \$3,300 | X | | | X | X |

*Reflects total project costs using 2024 estimates, subject to escalation. The impact fees are calculated based on construction costs only. The District estimates a current average construction cost of \$52,266,667. Construction costs for the impact fee calculation reflect average construction costs of the three elementary school capacity projects, with replacements average total capacity of 600 seats.

Table 11 - Projected Student Capacity (2024-2029)

Elementary School Surplus/Deficiency

| | 2023 | 2024 | 2025 | 2026 | 2027 | 2028 | 2029 |
|---|-------|-------|-------|-------|-------|-------|-------|
| Permanent Capacity | 4,112 | 4,112 | 4,112 | 4,112 | 4,112 | 4,112 | 4,731 |
| Added Capacity | | | | | | | 619^ |
| Portable Capacity** | 1,053 | 1,053 | 1,053 | 1,053 | 1,053 | 1,053 | 1,053 |
| Total Capacity | 5,165 | 5,165 | 5,165 | 5,165 | 5,165 | 5,165 | 5,784 |
| Enrollment | 4,708 | 4,814 | 4,837 | 4,905 | 4,933 | 4,968 | 4,993 |
| Surplus (Deficiency) – Permanent Capacity | (596) | (702) | (725) | (793) | (821) | (856) | (262) |
| Surplus (Deficiency) – All Capacity** | 457 | 351 | 328 | 260 | 232 | 197 | 791 |

^Capacity additions resulting from replacement and expansion of Cathcart, Dutch Hill, and Seattle Hill Elementary Schools
 **Except as specifically noted, does not reflect addition or removal of portable facilities over the planning period.

Middle School Surplus/Deficiency

| | 2023 | 2024 | 2025 | 2026 | 2027 | 2028 | 2029 |
|---|-------|-------|-------|-------|-------|-------|-------|
| Permanent Capacity | 1,850 | 1,850 | 1,850 | 1,850 | 1,850 | 1,850 | 1,850 |
| Added Capacity | | | | | | | |
| Portable Capacity** | | | | | | | |
| Total Capacity | 1,850 | 1,850 | 1,850 | 1,850 | 1,850 | 1,850 | 1,850 |
| Enrollment | 1,376 | 1,392 | 1,407 | 1,473 | 1,511 | 1,571 | 1,597 |
| Surplus (Deficiency) – Permanent Capacity | 474 | 458 | 443 | 377 | 339 | 279 | 253 |
| Surplus (Deficiency) – All Capacity*** | 474 | 458 | 443 | 377 | 339 | 279 | 253 |

**Except as specifically noted, does not reflect addition or removal of portable facilities over the planning period.

High School Surplus/Deficiency

| | 2023 | 2024 | 2025 | 2026 | 2027 | 2028 | 2029 |
|---|-------|-------|-------|-------|-------|-------|-------|
| Permanent Capacity | 3,400 | 3,400 | 3,400 | 3,400 | 3,400 | 3,400 | 3,400 |
| Added Capacity | | | | | | | |
| Portable Capacity** | 108 | 108 | 108 | 108 | 108 | 108 | 108 |
| Total Capacity | 3,508 | 3,508 | 3,508 | 3,508 | 3,508 | 3,508 | 3,508 |
| Enrollment | 3,108 | 3,009 | 3,007 | 2,944 | 2,958 | 3,043 | 3,104 |
| Surplus (Deficiency) – Permanent Capacity | 292 | 391 | 393 | 456 | 442 | 357 | 296 |
| Surplus (Deficiency) – All Capacity*** | 400 | 499 | 501 | 564 | 550 | 465 | 404 |

**Except as specifically noted, does not reflect addition or removal of portable facilities over the planning period.

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 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

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 (required on-site/off-site improvements) of growth-related school capacity. Costs vary with each site and each facility. See Table 9, 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.
- 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, 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. 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 District’s school impact fees are calculated to include the elementary capacity additions identified in this 2024 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
2024**

| Housing Type | Impact Fee Per Dwelling Unit |
|---------------------------|-------------------------------------|
| Single Family | \$5,361 |
| Townhome/Duplex | \$5,462 |
| Multi-Family (1 Bedroom) | \$0 |
| Multi-Family (2+ Bedroom) | \$1,357 |

**Table 12 reflects a 50% adjustment to the calculated fee as required by local ordinances.*

FACTORS FOR ESTIMATED IMPACT FEE CALCULATIONS

| | |
|---|-------------|
| Student Generation Factors – Single Family | |
| Elementary | .330 |
| Middle | .067 |
| Senior | .108 |
| Total | .506 |

| | |
|--|-------------|
| Student Generation Factors – Townhomes/Duplexes | |
| Elementary | .333 |
| Middle | .092 |
| Senior | .057 |
| Total | .483 |

| | |
|--|-------------|
| Student Generation Factors – Multi Family (2+ Bdrm) | |
| Elementary | .094 |
| Middle | .054 |
| Senior | .053 |
| Total | .201 |

| | |
|--|-----|
| Projected Student Capacity per Facility | |
| Elementary | 600 |
| Middle | - |
| Senior | - |

| | |
|--------------------------------------|---|
| Net Site Acreage per Facility | |
| Elementary | - |

| | |
|--|--------------|
| New Facility Construction Cost/Average (Table 10) | |
| Elementary - 600 students | \$52,666,667 |
| (average construction cost of three capacity projects) | |

| | |
|--|------------------|
| Permanent Facility Square Footage (SSD Inventory) | |
| Elementary | 529,676 |
| Middle | 292,469 |
| Senior | 529,161 |
| Total | 1,351,306 |

| | |
|--|---------------|
| Temporary Facility Square Footage (SSD Inventory) | |
| Elementary | 35,100 |
| Middle | 0 |
| Senior | 3,600 |
| Total | 38,700 |

| | |
|--------------------------------------|------------------|
| Total Facility Square Footage | |
| Elementary | 564,776 |
| Middle | 292,469 |
| Senior | 532,761 |
| Total | 1,390,000 |

| | |
|-------------------------------|-----|
| Average Site Cost/Acre | |
| Elementary | \$0 |

| | |
|------------------------------------|--|
| Temporary Facility Capacity | |
| Capacity | |
| Cost | |

| | |
|----------------------------------|--------|
| State Match Credit (OSPI) | |
| Current State Match Percentage | 53.42% |

| | |
|--|--------|
| Construction Cost Allocation (OSPI) | |
| July 2024 Release | 375.00 |

| | |
|--|-----------|
| District Average Assessed Value (Sno Cty) | |
| Single Family Residence | \$770,776 |

| | |
|--|-----------|
| District Average Assessed Value (Sno Cty) | |
| Townhome/Duplex (Using SF) | \$770,776 |

| | |
|--|-----------|
| District Average Assessed Value (Sno Cty) | |
| Multi Family (2+ Bedroom) | \$242,411 |

| | |
|---|-----|
| SPI Square Footage per Student (WAC 392-343-035) | |
| Elementary | 90 |
| Middle | 117 |
| Senior | 130 |

| | |
|---|---------|
| District Debt Service Tax Rate (Sno Cty) | |
| Current/\$1,000 | \$1.791 |

| | |
|---|-------|
| General Obligation Bond Interest Rate (Bond Buyer) | |
| Bond Buyer Index (2/22 avg) | 3.48% |

| | |
|--|---|
| Developer Provided Sites/Facilities | |
| Value | 0 |
| Dwelling Units | 0 |

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

APPENDIX A

POPULATION AND ENROLLMENT DATA

OSPI Cohort Projections (HC)

| School District | Grade | 2018 Actual | 2019 Actual | 2020 Actual | 2021 Actual | 2022 Actual | 2023 Actual | Survival Percentage | 2024 Projected | 2025 Projected | 2026 Projected | 2027 Projected | 2028 Projected | 2029 Projected |
|-----------------|--------------|----------------|----------------|----------------|----------------|----------------|----------------|------------------------|-------------------|-------------------|-------------------|-------------------|-------------------|-------------------|
| Snohomish | Kindergarten | 634 | 659 | 554 | 644 | 641 | 644 | | 638 | 640 | 643 | 645 | 648 | 650 |
| Snohomish | Grade 1 | 621 | 646 | 604 | 643 | 654 | 678 | 103.38 | 666 | 660 | 662 | 665 | 667 | 670 |
| Snohomish | Grade 2 | 663 | 624 | 611 | 644 | 675 | 687 | 102.33 | 694 | 682 | 675 | 677 | 680 | 683 |
| Snohomish | Grade 3 | 675 | 689 | 583 | 654 | 657 | 701 | 102.04 | 701 | 708 | 696 | 689 | 691 | 694 |
| Snohomish | Grade 4 | 706 | 690 | 657 | 594 | 679 | 673 | 101.14 | 709 | 709 | 716 | 704 | 697 | 699 |
| Snohomish | Grade 5 | 724 | 715 | 639 | 664 | 622 | 700 | 100.54 | 677 | 713 | 713 | 720 | 708 | 701 |
| Snohomish | Grade 6 | 779 | 734 | 685 | 637 | 691 | 646 | 100.95 | 707 | 683 | 720 | 720 | 727 | 715 |
| Snohomish | Grade 7 | 724 | 790 | 726 | 700 | 649 | 721 | 101.74 | 657 | 719 | 695 | 733 | 733 | 740 |
| Snohomish | Grade 8 | 775 | 749 | 762 | 719 | 719 | 656 | 100.54 | 725 | 661 | 723 | 699 | 737 | 737 |
| Snohomish | Grade 9 | 884 | 839 | 857 | 854 | 818 | 826 | 112.67 | 739 | 817 | 745 | 815 | 788 | 830 |
| Snohomish | Grade 10 | 906 | 897 | 822 | 857 | 849 | 838 | 100.25 | 828 | 741 | 819 | 747 | 817 | 790 |
| Snohomish | Grade 11 | 839 | 841 | 821 | 776 | 828 | 787 | 93.56 | 784 | 775 | 693 | 766 | 699 | 764 |
| Snohomish | Grade 12 | 848 | 819 | 824 | 843 | 757 | 793 | 98.31 | 774 | 771 | 762 | 681 | 753 | 687 |
| Snohomish | Total | 9,780 | 9,692 | 9,145 | 9,229 | 9,239 | 9,350 | | 9,299 | 9,279 | 9,262 | 9,261 | 9,345 | 9,360 |

Source: OSPI Form 1049 (printed February 2024)

Adjusted Cohort Enrollment Projections (FTE)

| Flo Forecasts - FTE | | | | | | | | | | | |
|---------------------|--|---------|---------|---------|---------|---------|---------|---------|---------|---------|---------|
| Grade | 2023-24 | 2024-25 | 2025-26 | 2026-27 | 2027-28 | 2028-29 | 2029-30 | 2030-31 | 2031-32 | 2032-33 | 2033-34 |
| K | 638.19 | 626 | 617 | 649 | 658 | 674 | 677 | 684 | 690 | 697 | 704 |
| 1 | 674.24 | 660 | 648 | 638 | 671 | 681 | 697 | 700 | 707 | 714 | 721 |
| 2 | 682 | 695 | 680 | 668 | 658 | 692 | 702 | 719 | 722 | 729 | 736 |
| 3 | 700.12 | 710 | 724 | 708 | 696 | 685 | 721 | 731 | 749 | 752 | 759 |
| 4 | 670.67 | 716 | 726 | 741 | 724 | 712 | 701 | 738 | 748 | 766 | 769 |
| 5 | 699.3 | 688 | 735 | 745 | 760 | 743 | 731 | 719 | 757 | 768 | 786 |
| 6 | 643.61 | 719 | 707 | 756 | 766 | 781 | 764 | 751 | 739 | 778 | 790 |
| 7 | 719.44 | 659 | 735 | 723 | 773 | 783 | 799 | 781 | 768 | 756 | 795 |
| 8 | 656.8 | 733 | 672 | 750 | 738 | 788 | 798 | 815 | 796 | 783 | 771 |
| 9 | 829.29 | 735 | 820 | 751 | 839 | 825 | 881 | 893 | 912 | 890 | 876 |
| 10 | 835.15 | 839 | 744 | 830 | 760 | 849 | 835 | 892 | 904 | 923 | 901 |
| 11 | 733.82 | 739 | 743 | 660 | 735 | 673 | 751 | 739 | 790 | 801 | 817 |
| 12 | 709.36 | 696 | 700 | 703 | 624 | 696 | 637 | 711 | 700 | 748 | 758 |
| K-6 | 4,708 | 4,814 | 4,837 | 4,905 | 4,933 | 4,968 | 4,993 | 5,042 | 5,112 | 5,204 | 5,265 |
| 7-8 | 1,376 | 1,392 | 1,407 | 1,473 | 1,511 | 1,571 | 1,597 | 1,596 | 1,564 | 1,539 | 1,566 |
| 9-12 | 3,108 | 3,009 | 3,007 | 2,944 | 2,958 | 3,043 | 3,104 | 3,235 | 3,306 | 3,362 | 3,352 |
| Total | 9,192 | 9,215 | 9,251 | 9,322 | 9,402 | 9,582 | 9,694 | 9,873 | 9,982 | 10,105 | 10,183 |
| Notes | Students enrolled in full-time Running Start and preschool are excluded. | | | | | | | | | | |

APPENDIX B

STUDENT GENERATION RATE REVIEW



MEMORANDUM

To: Tom Laufmann
Executive Director, Business Services
Snohomish School District
1601 Avenue D
Snohomish, WA 98290

Date: March 28, 2024

Project No.: F1371.01.005

From: Alex Brasch
Senior Population Geographer

Re: 2023–24 Student Generation Rates—Snohomish School District

At the request of the Snohomish School District (SSD/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 SSD K–12 students (October 2023 headcount) residing in new single-family (SF) detached and townhome/duplex 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 SSD students, the District provided FLO with October 2023 headcount enrollment, which FLO geocoded to

FLO Analytics | 1-888-847-0299 | www.flo-analytics.com

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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 and townhome/duplex units. The number of multifamily (MF) units built during the period was insufficient to produce reliable SGRs. 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 in the townhome/duplex category, the dwellings are constructed vertically from the foundation to the roof for individual occupancy by a household.

Results

Table 1 includes the number of housing units and SGRs for SF detached and townhome/duplex housing types, as well as the number of students by grade group that have addresses matching the housing units. Of the 8,409 students residing within the district, 871 live in the 1,722 SF detached units that were built between 2015 and 2022, while 42 live in the 87 townhomes/duplexes built in the same period. On average, each SF detached housing unit yields 0.506 K-12 students, while each townhome/duplex yields 0.483 K-12 students. The number of MF units built in the district between 2015 and 2022 is insufficient to produce reliable SGRs; therefore, no SGRs were calculated for that housing type.

Table 1: K-12 Students per Housing Unit Built 2015-2022

| Housing Type | Housing Units | K-6 Students | 7-8 Students | 9-12 Students | K-12 Students | K-6 SGR | 7-8 SGR | 9-12 SGR | K-12 SGR |
|----------------------------------|---------------|--------------|--------------|---------------|---------------|---------|---------|----------|----------|
| Single-family Detached | 1,722 | 569 | 116 | 186 | 871 | 0.330 | 0.067 | 0.108 | 0.506 |
| Townhome / Duplex ^(a) | 87 | 29 | 8 | 5 | 42 | 0.333 | 0.092 | 0.057 | 0.483 |

Notes

The number of MF units built in the district between 2015 and 2022 is insufficient to produce reliable SGRs; therefore, no SGRs were calculated for that housing type.

(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.

Sources

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

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 (or Multi-Family units with one bedroom or less). The District calculated Multi-Family 2+ BR student generation rates using the countywide average of the corresponding rates published in the 2022 capital facilities plans (the last County-adopted set of plans) of the other school districts in Snohomish County who prepared their own rates. These averages reflect recent development trends in Snohomish County. As a comparison to Snohomish County, 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 apply the 2022 calculated average* as an estimate of student generation from new Multi-Family 2+ bedroom units within the Snohomish School District.

The resulting average student generation rates are as follows:

| | | | |
|---------------------------------|--------------|--------------|--------------|
| Multi-Family 2+ BR Rates | K-5 | 6-8 | 9-12 |
| | 0.094 | 0.054 | 0.053 |

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.

**Excluding certain anomalies of districts with high multi-family rates (Everett, Mukilteo) or low multi-family rates (Monroe).*

APPENDIX A

SCHOOL IMPACT FEE FORMULA

| SCHOOL IMPACT FEE CALCULATIONS | | | | | | | | | |
|---|---------------------------|---------------|----------|----------------|----------------|----------------|-----------------|-----------------|----------------|
| DISTRICT | Snohomish School District | | | | | | | | |
| YEAR | 2024 | | | | | | | | |
| School Site Acquisition Cost: | | | | | | | | | |
| ((AcresxCost per Acre)/Facility Capacity)xStudent Generation Factor | | | | | | | | | |
| | Facility | Cost/ | Facility | Student | Student | Student | Cost/ | Cost/ | Cost/ |
| | Acres | Acre | Capacity | SFR | TH/Duplex | MFR (2+) | SFR | TH/Duplex | MFR (2+) |
| Elementary | 10.00 | \$ - | 600 | 0.330 | 0.333 | 0.094 | \$0 | \$0 | \$0 |
| Middle | 20.00 | \$ - | 900 | 0.067 | 0.092 | 0.054 | \$0 | \$0 | \$0 |
| High | 40.00 | \$ - | 1,800 | 0.108 | 0.057 | 0.053 | \$0 | \$0 | \$0 |
| | | | | | | TOTAL | \$0 | \$0 | \$0 |
| School Construction Cost: | | | | | | | | | |
| ((Facility Cost/Facility Capacity)xStudent Generation Factor)x(permanent/Total Sq Ft) | | | | | | | | | |
| | %Perm/ | Facility | Facility | Student | Student | Student | Cost/ | Cost/ | Cost/ |
| | Total Sq.Ft. | Cost | Capacity | SFR | TH/Duplex | MFR (2+) | SFR | TH/Duplex | MFR (2+) |
| Elementary | 97.22% | \$ 52,666,667 | 600 | 0.330 | 0.333 | 0.094 | \$28,161 | \$28,417 | \$8,022 |
| Middle | 97.22% | | 900 | 0.067 | 0.092 | 0.054 | \$0 | \$0 | \$0 |
| High | 97.22% | \$ - | 1800 | 0.108 | 0.057 | 0.053 | \$0 | \$0 | \$0 |
| | | | | | | TOTAL | \$28,161 | \$28,417 | \$8,022 |
| Temporary Facility Cost: | | | | | | | | | |
| ((Facility Cost/Facility Capacity)xStudent Generation Factor)x(Temporary/Total Square Feet) | | | | | | | | | |
| | %Temp/ | Facility | Facility | Student | Student | Student | Cost/ | Cost/ | Cost/ |
| | Total Sq.Ft. | Cost | Size | SFR | TH/Duplex | MFR (2+) | SFR | TH/Duplex | MFR (2+) |
| Elementary | 2.78% | \$ - | 25 | 0.330 | 0.333 | 0.094 | \$0 | \$0 | \$0 |
| Middle | 2.78% | \$ - | 30 | 0.067 | 0.092 | 0.054 | \$0 | \$0 | \$0 |
| High | 2.78% | \$ - | 32 | 0.108 | 0.057 | 0.053 | \$0 | \$0 | \$0 |
| | | | | | | TOTAL | \$0 | \$0 | \$0 |
| State School Construction Funding Assistance Credit: | | | | | | | | | |
| CCA X SPI Square Footage X District Funding Assistance % X Student Factor | | | | | | | | | |
| | CCA | SPI | Funding | Student | Student | Student | Cost/ | Cost/ | Cost/ |
| | | Footage | Asst % | SFR | TH/Duplex | MFR (2+) | SFR | TH/Duplex | MFR (2+) |
| Elementary | \$ 375.00 | 90 | 53.42% | 0.330 | 0.333 | 0.094 | \$5,950 | \$6,004 | \$1,695 |
| Middle | \$ 375.00 | 117 | | 0.067 | 0.092 | 0.054 | \$0 | \$0 | \$0 |
| High | \$ 375.00 | 130 | 0.00% | 0.108 | 0.057 | 0.053 | \$0 | \$0 | \$0 |
| | | | | | | TOTAL | \$5,950 | \$6,004 | \$1,695 |
| Tax Payment Credit: | | | | | | | SFR | TH/Duplex | MFR (2+) |
| Average Assessed Value | | | | | | | \$770,776 | \$770,776 | \$242,411 |
| Capital Bond Interest Rate | | | | | | | 3.48% | 3.48% | 3.48% |
| Net Present Value of Average Dwelling | | | | | | | \$6,416,707 | \$6,416,707 | \$2,018,070 |
| Years Amortized | | | | | | | 10 | 10 | 10 |
| Property Tax Levy Rate | | | | | | | \$1.79 | \$1.79 | \$1.79 |
| Present Value of Revenue Stream | | | | | | | \$11,490 | \$11,490 | \$3,614 |
| Fee Summary: | | | | Single | Townhome | Multi- | | | |
| | | | | Family | Duplex | Family (2+) | | | |
| Site Acquisition Costs | | | | \$0 | \$0 | \$0 | | | |
| Permanent Facility Cost | | | | \$28,161 | \$28,417 | \$8,022 | | | |
| Temporary Facility Cost | | | | \$0 | \$0 | \$0 | | | |
| State SCFA Credit | | | | (\$5,950) | (\$6,004) | (\$1,695) | | | |
| Tax Payment Credit | | | | (\$11,490) | (\$11,490) | (\$3,614) | | | |
| FEE (AS CALCULATED) | | | | \$10,722 | \$10,924 | \$2,713 | | | |
| Fee (AS DISCOUNTED) | | | | \$5,361 | \$5,462 | \$1,357 | | | |

Sultan School District # 311

Capital Facilities Plan

2024-2029

BOARD APPROVED

JUL 22 2024

SULTAN SCHOOL DISTRICT

Adopted: _____

Sultan School District No. 311

Capital Facilities Plan

2024-2029

For Inclusion in the
Snohomish County Comprehensive Plan

BOARD OF DIRECTORS

Gigi Gouldner, Chair

Marianne Naslund, Vice Chair

Isaac Hudy

Dave Shepherd

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 (2024-2029).

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:

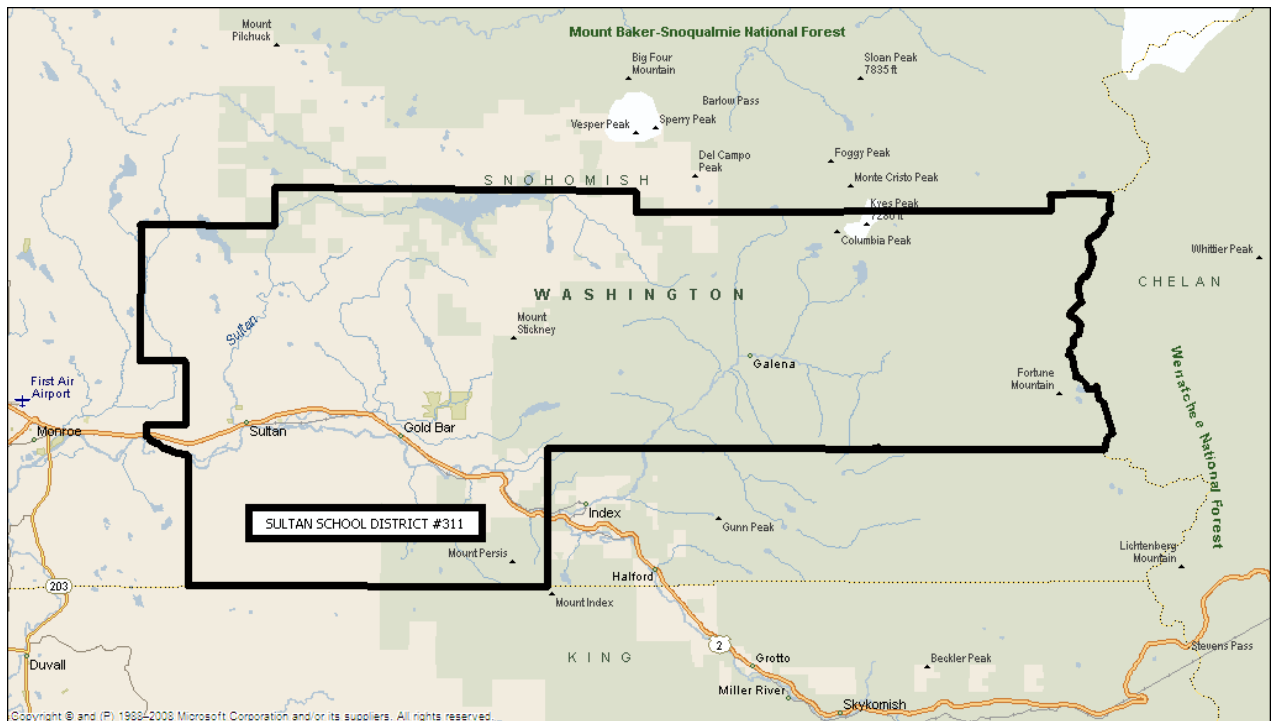
- ❖ Information was obtained from recognized sources, such as the WA State Office of Superintendent of Public Instruction (OSPI), U.S. Census, or other governmental report. School districts may generate their own data if it is derived through statistically reliable methodologies. Information is to be 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 2,051 (October 1 headcount) 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 2023 of 16,454 residents (Snohomish County 2044 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.

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, 1st 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 considering 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 600 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/junior high school is 700 students and for a new high school 800 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
- ❖ Pre-Kindergarten
- ❖ 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

- ❖ R.A.P. Regional Apprenticeship Pathways
- ❖ Workforce (Cooperative School) for Grades 11-12
- ❖ Sultan Parent Partnership Program (SP3)
- ❖ Sky Valley Options (Alternative High School)
- ❖ Sultan Virtual Academy
- ❖ 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 lunchroom/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’s portables have adequate remaining useful life and the District regularly assesses the condition of its portables for continued educational program use.

Standard of Service Summary

In summary, the District’s adopted standard of service is as follows:

| Adopted Standard of Service | Grades K-3 | Grades 4-5 | Grades 6-8 | Grades 9-12 |
|------------------------------------|-------------------|-------------------|-------------------|--------------------|
| Students/Classroom | 17 | 25 | 25 | 25 |

Minimum Level of Service (MLOS)

Snohomish County requires that the District identify a “minimum level of service” (MLOS) for the purpose of County compliance reporting. The MLOS is not the District’s desired or accepted operating standard. 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.

For purposes of Snohomish County compliance, 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, Home Eco, 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 2021-2022 and 2022-2023, the District’s compliance with the minimum educational service standards was as follows:

Table 1 Minimum Level of Service

| 2021- 22 School Year | | | | | | |
|----------------------|--|--|-----------------------------------|------------------------------------|---------------------------------|----------------------------------|
| LOS Standard | MINIMUM LOS# Elementary | REPORTED LOS Elementary | MINIMUM LOS Middle | REPORTED LOS Middle | MINIMUM LOS High | REPORTED LOS High |
| | 28 | 18.57 | 30 | 29.53 | 32 | 23.15 |

* 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).

| 2022-23 School Year | | | | | | |
|---------------------|--|--|-----------------------------------|------------------------------------|---------------------------------|----------------------------------|
| LOS Standard | MINIMUM LOS# Elementary | REPORTED LOS Elementary | MINIMUM LOS Middle | REPORTED LOS Middle | MINIMUM LOS High | REPORTED LOS High |
| | 28 | 19.94 | 30 | 29.93 | 32 | 23.96 |

* 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 9-12.¹ 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 50 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 50 portable teaching stations listed in inventory, 26 are used as general education classrooms. The other 24 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.

¹ The District anticipates that, following the construction of the capacity identified in this Capital Facilities Plan, it will reconfigure grade levels to K-4, 5-6, 7-8, and 9-12.

Table 2 Permanent Classroom Capacity Inventory

| Elementary School | Site Size (Acres) | Bldg Area (Square Feet) | Total Teaching Stations | Teaching Stations General Education | Student Classroom Capacity |
|--|--------------------------|--------------------------------|--------------------------------|--|-----------------------------------|
| Sultan Elementary 501 Date Ave, Sultan | 7.9 | 52,661 sf | 24 | 20 | 389 |
| Gold Bar Elementary 419 Lewis Ave, Gold Bar | 9.4 | 33,723 sf | 16 | 13 | 221 |
| TOTAL K-5 | 17.3 | 86,384 sf | 40 | 33 | 610 |

| Middle School | Site Size (Acres) | Bldg Area (Square Feet) | Total Teaching Stations | Teaching Stations General Education | Student Classroom Capacity |
|--|--------------------------|--------------------------------|--------------------------------|--|-----------------------------------|
| Sultan Middle School 301 High Ave, Sultan | 10.41 | 66,912 sf | 26 | 14 | 350 |
| TOTAL 6-8 | 10.41 | 66,912 sf | 26 | 14 | 350 |

| High School | Site Size (Acres) | Bldg Area (Square Feet) | Total Teaching Stations | Teaching Stations General Education | Student Classroom Capacity |
|---|--------------------------|--------------------------------|--------------------------------|--|-----------------------------------|
| Sultan High School 1000 Turk Drive, Sultan | 33.75 | 71,876 sf | 24 | 17 | 425 |
| TOTAL 9-12 | 33.75 | 71,876 sf | 24 | 17 | 425 |

| | | | | | |
|--------------------|--|-------------------|-----------|-----------|--------------|
| GRAND TOTAL | | 225,172 sf | 90 | 64 | 1,385 |
|--------------------|--|-------------------|-----------|-----------|--------------|

Table 3 Portable Classroom Capacity Inventory

| Elementary School | Bldg Area (Square Feet) | Total Teaching Stations | Teaching Stations General Education | Student Classroom Capacity |
|--------------------------|------------------------------------|--|--|---|
| Sultan Elementary | 16,164 sf | 18 | 11 | 275 |
| Gold Bar Elementary | 10,776 sf | 12 | 5 | 125 |
| TOTAL | 26,940 sf | 30 | 16 | 400 |

| Middle School | Bldg Area (Square Feet) | Total Teaching Stations | Teaching Stations General Education | Student Classroom Capacity |
|----------------------|------------------------------------|--|--|---|
| Sultan Middle School | 4,480 sf | 5 | 1 | 25 |
| TOTAL | 4,480 sf | 5 | 1 | 25 |

| High School | Bldg Area (Square Feet) | Total Teaching Stations | Teaching Stations General Education | Student Classroom Capacity |
|--------------------|------------------------------------|--|--|---|
| Sultan High School | 13,476 sf | 13 | 9 | 225 |
| TOTAL | 13,476 sf | 13 | 9 | 225 |

| Alternative Program | Bldg Area (Square Feet) | Total Teaching Stations | Teaching Stations General Education | Student Classroom Capacity |
|-------------------------------|------------------------------------|--|--|---|
| Sky Valley Option High School | 1,792 sf | 2 | 0 | 0 |
| TOTAL | 1,792 sf | 2 | 0 | 0 |

| | | | | |
|--------------------|------------------|-----------|-----------|------------|
| GRAND TOTAL | 46,688 sf | 50 | 26 | 650 |
|--------------------|------------------|-----------|-----------|------------|

**Table 4 Classroom Capacity – Permanent and Temporary Inventory
Combined Total**

| Elementary School | Permanent/ Temporary (Square Feet) | Total Teaching Stations | Teaching Stations General Education | Total Maximum Student Capacity |
|--------------------------|---|--|--|---|
| Sultan Elementary | 68,825 sf | 42 | 31 | 664 |
| Gold Bar Elementary | 44,499 sf | 28 | 18 | 346 |
| TOTAL K-5 | 113,324 sf | 70 | 49 | 1,010 |

| Middle School | Permanent/ Temporary (Square Feet) | Total Teaching Stations | Teaching Stations General Education | Total Maximum Student Capacity |
|----------------------|---|--|--|---|
| Sultan Middle School | 71,392 sf | 31 | 15 | 375 |
| TOTAL 6-8 | 71,392 sf | 31 | 15 | 375 |

| High School | Permanent/ Temporary (Square Feet) | Total Teaching Stations | Teaching Stations General Education | Total Maximum Student Capacity |
|--------------------|---|--|--|---|
| Sultan High School | 85,352 sf | 37 | 26 | 650 |
| TOTAL 9-12 | 85,352 sf | 37 | 26 | 650 |

| Alternative Program | Permanent/ Temporary (Square Feet) | Total Teaching Stations | Teaching Stations General Education | Student Classroom Capacity |
|-----------------------------------|---|--|--|---|
| Sky Valley Options High School | 1,792 | 2 | 0 | 0 |
| TOTAL | 1,792 | 2 | 0 | 0 |

| | | | | |
|--------------------|-------------------|------------|-----------|--------------|
| GRAND TOTAL | 271,860 sf | 140 | 90 | 2,035 |
|--------------------|-------------------|------------|-----------|--------------|

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

| Facility | Building Area (Square Feet) |
|---|--|
| Administration | 3,149 |
| Transportation and Operations Building | 12,108 |
| TOTAL | 15,257 |

Additional Land Inventory

The District several years ago 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 the school facility on that site. The District recently acquired a 49.37 acre parcel from the Department of Natural Resources (for a future elementary school and high school site).

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 2024-2029

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 2020 and 2023, the District’s enrollment averaged approximately 12.69% 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 2,250 students is projected for 2029. This is an increase of 199 students from actual October 2023 enrollment, or a 9.70% increase. Using the OFM methodology, student enrollment is anticipated at 2,420 by 2044 when the Population Forecast of 19,078 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 1st 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). The most recent OSPI cohort survival projections are artificially influenced by enrollment anomalies occurring during the pandemic, and its reliability should be viewed through that lens. Based on the OSPI “cohort” methodology, the District’s enrollment will increase in 2029 to 2,255 students, an increase of 9.95% over 2023 headcount enrollment. See Appendix A – page 1.
3. ***The District*** contracted with a demographer to forecast future enrollments. This methodology, a modified cohort survival method, considers historic enrollment trends in the District, development data, known data regarding local housing circumstances, Snohomish County population projections, census data, and birth rates. The District’s enrollment projections start with actual 2022 headcount enrollment and use a monthly average to produce an annual enrollment number. See Appendix A – page 2, FLO Analytics (October 4, 2023). Based upon the District’s methodology, the District’s enrollment will increase over October 2023 enrollment by a total of 255 students by 2029, an increase of 12.43% over 2023 actual enrollment. See Appendix A – page 2.

OFM, OSPI, and the District’s enrollment projections are reflected in Table 6.

Table 6 Enrollment Projections

| | | | | | | | | Projected Change | Percent Change |
|-----------------------------|-------------------|--------------|--------------|--------------|--------------|--------------|---------------|-----------------------------|---------------------------|
| Method | 2023 [^] | 2024 | 2025 | 2026 | 2027 | 2028 | 2029 | 2023-2029 | 2023-2029 |
| OFM | 2,051 | 2,084 | 2,117 | 2,150 | 2,183 | 2,216 | 2,250 | 199 | 9.70% |
| OSPI | 2,051 | 2,081 | 2,075 | 2,108 | 2,132 | 2,202 | 2,255 | 204 | 9.95% |
| District | 2,051 | 2,114 | 2,117 | 2,145 | 2,188 | 2,262 | 2,306 | 255 | 12.43% |
| Population Projections** | 16,454 | | | | | | 17,729 | 1,275 | 7.75% |

[^]October 1, 2023 actual HC enrollment reported on OSPI Form 1049
^{**}Snohomish County 2044 GMA Population Forecast

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 – 2044

Student enrollment projections beyond 2029 are highly speculative. Using OFM/County data as a base, the District projects a 2044 student population of 2,421. This is based on the OFM/County data and the District’s corresponding average 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 2044 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 2023 to 2044

| Grade Span | Actual Enrollment – October 2023 | Projected Enrollment 2044* |
|---------------------|---|-----------------------------------|
| Elementary (K-5) | 953 | 1,125 |
| Middle School (6-8) | 425 | 501 |
| High School (9-12) | 673 | 794 |
| TOTAL (K-12) | 2,051 | 2,420 |

Note: Snohomish County Planning and Development Service provided the underlying data (the “2044 GMA Population Forecast by School District”) for the 2044 projections.

Section 6: Capital Facility Needs

The projected available student capacity was determined by subtracting permanent capacity from actual 2023 enrollment and projected 2029 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 2023 Enrollment

| Grade Span | Permanent Capacity | Enrollment | Available Capacity* | Unhoused Students |
|--------------------------|--------------------|------------------|---------------------|-------------------|
| Elementary Level (K-5) | 610 | 953 | 0 | 343 |
| Middle Level (6-8) | 350 | 425 | 0 | 75 |
| High School Level (9-12) | 425 | 595 ² | 0 | 170 |
| TOTALS | 1,385 | 1,973 | 0 | 588 |

*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 2029, the end of the six-year forecast period:

Table 9 Unhoused Students – Based on Projected October 2029 Enrollment

| Grade Span | Permanent Capacity | Enrollment | Available Capacity* | Unhoused Students | %age of Unhoused Students above 2023 |
|--------------------------|--------------------|--------------|---------------------|-------------------|--------------------------------------|
| Elementary Level (K-5) | 610 | 1,104 | 0 | 494 | 44.02% |
| Middle Level (6-8) | 350 | 540 | 0 | 190 | 153.30% |
| High School Level (9-12) | 425 | 662 | 0 | 237 | 39.00% |
| TOTALS | 1,385 | 2,306 | 0 | 751 | 28.00% |

*Permanent capacity only

Table 9 demonstrates that projected growth through 2029 will impact the District’s facilities at all 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 2029 are included in Table 10 and more fully described in Table 11.

² Adjusted based on current ALE (including Running Start) enrollment at the 9-12 level to reflect current FTE using regular capacity.

Table 10 Projected Student Capacity – 2023 through 2029

Elementary School -- Surplus/Deficiency

| | 2023* | 2024 | 2025 | 2026 | 2027 | 2028° | 2029 |
|--|-------|-------|-------|-------|-------|--------|-------|
| Existing Capacity | 610 | 610 | 610 | 610 | 610 | 221°° | 771 |
| Added Permanent Capacity | 0 | 0 | 0 | 0 | 0 | 550**+ | |
| Enrollment | 953 | 1,018 | 1,019 | 1,035 | 1,068 | 913 | 919 |
| Permanent Facilities Surplus/(Deficiency)^ | (343) | (408) | (409) | (425) | (458) | (142) | (148) |

* Actual Oct. 2023 enrollment

** Classroom addition at Gold Bar Elementary (100)

+ New Pre-K to 4th Grade Elementary School (450)

^Does not include capacity solutions with current and planned portable classrooms

°Grade reconfiguration will occur, with conversion of elementary level from K-5 to K-4 and adding a 5-6 middle school program (at the existing Sultan Elementary School).

°°Sultan Elementary converted to a new 5-6 middle school program (capacity moved to middle/jr hi level)

Middle School Level -- Surplus/Deficiency

| | 2023* | 2024 | 2025 | 2026 | 2027 | 2028° | 2029 |
|--|-------|-------|-------|-------|-------|-------|-------|
| Existing Capacity | 350 | 350 | 350 | 350 | 350 | 350 | 389 |
| Added Permanent Capacity | 0 | 0 | 0 | 0 | 0 | 389°° | 704** |
| Enrollment | 425 | 455 | 487 | 506 | 532 | 710 | 725 |
| Permanent Facilities Surplus/(Deficiency)^ | (75) | (105) | (137) | (156) | (182) | 29 | 368 |

* Actual Oct. 2023 enrollment

^ Does not include capacity solutions with in current portable classrooms

°Grade reconfiguration will occur, with conversion of middle level from 6-8 to 7-8

°°Existing SES converted to a 506 middle school; existing SMS houses 7-8 junior high school temporarily.

**Current SHS converted to a new Sultan Junior High School with added capacity (net gain of +224 seats); existing Sultan MS converted to alternative learning program.

High School Level -- Surplus/Deficiency

| | 2023* | 2024 | 2025 | 2026 | 2027 | 2028 | 2029 |
|--|-------|-------|-------|-------|-------|-------|-------|
| Existing Capacity | 425 | 425 | 425 | 425 | 425 | 425 | 0 |
| Added Permanent Capacity | 0 | 0 | 0 | 0 | 0 | 0 | 800** |
| Enrollment | 595 | 641 | 611 | 604 | 588 | 639 | 662 |
| Permanent Facilities Surplus/(Deficiency)^ | (170) | (216) | (186) | (179) | (163) | (214) | 138 |

* Actual Oct. 2023 enrollment as adjusted for actual FTE based on current ALE/Running Start

** Classroom addition at Sultan High School (256)

^ Does not include capacity solutions with current and planned portable classrooms

**New High School (800 seats); existing SHS converted to new Sultan Jr. High School, with expanded capacity.

Planned Improvements

Table 10 indicates that the District will need additional capacity at all grade levels to serve projected student enrollment. The District is engaging in early bond planning to reflect the projects included in this Capital Facilities Plan. A future resolution(s) by the Board of Directors, as well as voter approval of a bond or capital levy funding, will be required to fund the planned projects. Future updates to this CFP will include updated information regarding any adopted bond or capital levy resolutions.

Projects Adding Permanent Capacity (subject to funding):

- a 100 seat expansion at Gold Bar Elementary School (reconfigure to PreK-4th);
- a new 450 student elementary school (configure to PreK-4th);
- a 256 seat expansion at Sultan High School to convert that school to the new Sultan Junior High School; and
- a new 800 student Sultan High School.

Non-Capacity Adding Projects (subject to funding):

- Modernization and improvements at Gold Bar Elementary; and
- Modernization and improvements to the current Sultan Elementary School to convert it to a middle school program (5th and 6th grades).

Following construction of the new Sultan High School and the addition at the existing SHS allowing for conversion to the new Sultan Junior High School, the Sultan Middle School facility is anticipated to be used for alternative learning program space as well as other District program needs.

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 (SCAP) 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 61.68% 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.

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. 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 2024-2029

Improvements Adding Permanent Capacity (Costs in Millions)

| Project | 2024 | 2025 | 2026 | 2027 | 2028 | 2029 | Total Cost | Bonds/ Levy | State Funds | Impact Fees |
|--|--------|------|------|--------|------|----------|------------|-------------|-------------|-------------|
| Elementary School | | | | | | | | | | |
| Gold Bar Elementary Addition | | | | \$37.9 | | | \$37.9 | X | X | X |
| New Elementary | | | | \$50.2 | | | \$50.2 | X | X | X |
| Middle School | | | | | | | | | | |
| Capacity Addition at SHS to convert to a new Sultan Junior High School (7-8) | | | | | | \$31.633 | \$31.633 | X | | X |
| High School | | | | | | | | | | |
| New High School | | | | | | \$98.853 | \$98.853 | X | X | X |
| K-12 | | | | | | | | | | |
| Portables | | | | | | | TBD | | | X |
| Site Acquisition (new ES and new HS) | \$0.50 | | | | | | \$0.50 | X | | X |

Improvements Not Adding Permanent Capacity (Costs in Millions)

| Project | 2024 | 2025 | 2026 | 2027 | 2028 | 2029 | Total Cost | Bonds/ Levy | State Funds | Impact Fees |
|--|------|------|------|----------|------|------|------------|-------------|-------------|-------------|
| Elementary School | | | | | | | | | | |
| Sultan Elementary Modernization and conversion to 5 th -6 th grade | | | | \$2.7 | | | \$2.7 | X | | |
| Gold Bar Elementary Modernization | | | | \$12.099 | | | \$12.099 | X | X | |
| Middle School | | | | | | | | | | |
| High School | | | | | | | | | | |
| | | | | | | | | | | |
| | | | | | | | | | | |

**Estimated facility and land costs; 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; and

A proposed fee schedule that reflects expected student generation rates from, at minimum, the following residential dwelling unit types: single-family, multi-family/studio or 1-bedroom, and multi-family/2-bedroom or more.

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, townhomes/duplex units, 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:

- A new 450 student elementary school (including land acquisition);
- 256 student capacity addition at Sultan High School to expand capacity and convert to a new Sultan Junior High School; and
- A new 800 student Sultan High School (including land acquisition).

The Gold Bar Elementary School Addition is not included in the impact fee calculations but is a growth-related project. The cost per dwelling unit for the 450 student elementary school addresses the proportionate share of the total capacity of the new elementary school and the Gold Bar Elementary addition.

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

Table 12 School Impact Fees

| Housing Type | Impact Fee Per Unit |
|---|----------------------------|
| <i>Single Family Residential</i> (detached) | \$14,002 |
| <i>Townhome/Duplex</i> | \$7,161 |
| <i>Multi-Family (2+ bdrms)</i> | \$7,161 |
| <i>Multi-Family (studio or 1 bdrm)</i> | \$0 |

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

APPENDIX A

**OSPI Cohort Survival Projections
(Sultan School District)**

| School District | Grade | 2018 Actual | 2019 Actual | 2020 Actual | 2021 Actual | 2022 Actual | 2023 Actual | Survival Percentage | 2024 Projected | 2025 Projected | 2026 Projected | 2027 Projected | 2028 Projected | 2029 Projected |
|-----------------|--------------|----------------|----------------|----------------|----------------|----------------|----------------|------------------------|-------------------|-------------------|-------------------|-------------------|-------------------|-------------------|
| Sultan | Kindergarten | 137 | 158 | 132 | 156 | 179 | 146 | | 165 | 168 | 172 | 176 | 180 | 183 |
| Sultan | Grade 1 | 158 | 147 | 143 | 143 | 169 | 159 | 100.65 | 147 | 166 | 169 | 173 | 177 | 181 |
| Sultan | Grade 2 | 147 | 154 | 145 | 159 | 161 | 167 | 103.73 | 165 | 152 | 172 | 175 | 179 | 184 |
| Sultan | Grade 3 | 127 | 158 | 142 | 147 | 170 | 157 | 101.09 | 169 | 167 | 154 | 174 | 177 | 181 |
| Sultan | Grade 4 | 151 | 125 | 133 | 156 | 147 | 172 | 98.72 | 155 | 167 | 165 | 152 | 172 | 175 |
| Sultan | Grade 5 | 162 | 152 | 124 | 149 | 151 | 152 | 102.41 | 176 | 159 | 171 | 169 | 156 | 176 |
| Sultan | Grade 6 | 173 | 170 | 149 | 128 | 149 | 150 | 101.10 | 154 | 178 | 161 | 173 | 171 | 158 |
| Sultan | Grade 7 | 141 | 178 | 153 | 156 | 133 | 146 | 99.89 | 150 | 154 | 178 | 161 | 173 | 171 |
| Sultan | Grade 8 | 154 | 144 | 180 | 159 | 167 | 129 | 102.24 | 149 | 153 | 157 | 182 | 165 | 177 |
| Sultan | Grade 9 | 132 | 164 | 150 | 180 | 167 | 176 | 104.21 | 134 | 155 | 159 | 164 | 190 | 172 |
| Sultan | Grade 10 | 148 | 142 | 150 | 146 | 184 | 160 | 98.87 | 174 | 132 | 153 | 157 | 162 | 188 |
| Sultan | Grade 11 | 142 | 148 | 133 | 143 | 137 | 188 | 96.99 | 155 | 169 | 128 | 148 | 152 | 157 |
| Sultan | Grade 12 | 123 | 141 | 143 | 133 | 135 | 149 | 99.81 | 188 | 155 | 169 | 128 | 148 | 152 |
| Sultan | Total | 1,895 | 1,981 | 1,877 | 1,955 | 2,049 | 2,051 | | 2,081 | 2,075 | 2,108 | 2,132 | 2,202 | 2,255 |

Source: OSPI Form 1049 (February 2024)

**Modified Cohort Survival Projections
(FLO Analytics - Sultan School District)**

| Grade | 2022-23 | 2023-24 | 2024-25 | 2025-26 | 2026-27 | 2027-28 | 2028-29 | 2029-30 | 2030-31 | 2031-32 | 2032-33 |
|--------------|------------|------------|------------|------------|------------|------------|------------|------------|------------|------------|------------|
| K | 164 | 158 | 167 | 161 | 169 | 191 | 181 | 172 | 174 | 175 | 177 |
| 1 | 169 | 173 | 168 | 178 | 171 | 180 | 203 | 193 | 183 | 185 | 186 |
| 2 | 161 | 166 | 170 | 165 | 175 | 168 | 177 | 200 | 190 | 180 | 182 |
| 3 | 170 | 163 | 168 | 172 | 167 | 177 | 170 | 179 | 202 | 192 | 182 |
| 4 | 147 | 175 | 167 | 173 | 177 | 172 | 182 | 175 | 184 | 208 | 197 |
| 5 | 151 | 149 | 178 | 170 | 176 | 180 | 175 | 185 | 178 | 187 | 211 |
| 6 | 149 | 154 | 152 | 181 | 173 | 179 | 184 | 178 | 189 | 181 | 191 |
| 7 | 133 | 151 | 156 | 154 | 183 | 175 | 181 | 186 | 180 | 191 | 183 |
| 8 | 167 | 129 | 147 | 152 | 150 | 178 | 170 | 176 | 181 | 175 | 186 |
| 9 | 166 | 173 | 134 | 153 | 158 | 156 | 185 | 176 | 183 | 188 | 182 |
| 10 | 183 | 167 | 174 | 134 | 154 | 159 | 157 | 186 | 177 | 184 | 189 |
| 11 | 137 | 174 | 159 | 165 | 127 | 146 | 151 | 149 | 177 | 168 | 175 |
| 12 | 135 | 137 | 174 | 159 | 165 | 127 | 146 | 151 | 149 | 177 | 168 |
| K-5 | 962 | 984 | 1,018 | 1,019 | 1,035 | 1,068 | 1,088 | 1,104 | 1,111 | 1,127 | 1,135 |
| 6-8 | 449 | 434 | 455 | 487 | 506 | 532 | 535 | 540 | 550 | 547 | 560 |
| 9-12 | <u>621</u> | <u>651</u> | <u>641</u> | <u>611</u> | <u>604</u> | <u>588</u> | <u>639</u> | <u>662</u> | <u>686</u> | <u>717</u> | <u>714</u> |
| Total | 2,032 | 2,069 | 2,114 | 2,117 | 2,145 | 2,188 | 2,262 | 2,306 | 2,347 | 2,391 | 2,409 |

Figure 18 source: Sultan School District October 2022-23 enrollment and FLO 2023-24 to 2032-33 enrollment forecasts (middle scenario), excluding CVA, SP3, and Transitional Kindergarten.

APPENDIX B



MEMORANDUM

To: Charlie Weaver
Sultan School District
514 4th Street
Sultan, WA 98294

Date: April 9, 2024

Project No.: F2550.01.002

From: Alex Brasch
Senior Population Geographer

Re: 2023–24 Student Generation Rates—Sultan School District

At the request of the Sultan School District (SSD/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 SSD K–12 students (October 2023 headcount) residing in new single-family (SF) detached 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 SSD students, the District provided FLO with October 2023 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. The number of townhome/duplex and multifamily (MF) units built during the period was insufficient to produce reliable SGRs. 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 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.

Results

Table 1 includes the number of housing units and SGRs for SF detached housing types, as well as the number of students by grade group that have addresses matching the housing units. Of the 1,982 students residing within the district, 411 live in the 1,016 SF detached units that were built between 2015 and 2022. On average, each SF detached housing unit yields 0.405 K–12 students. The number of townhome/duplex and MF units built in the district between 2015 and 2022 is insufficient to produce reliable SGRs; therefore, no SGRs were calculated for those housing types.

Table 1: K–12 Students 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 | 1,016 | 231 | 80 | 100 | 411 | 0.227 | 0.079 | 0.098 | 0.405 |

Notes

Housing units built in 2023 are excluded, because they may not have been completed and occupied by October 2023. The number of MF units built in the district between 2015 and 2022 is insufficient to produce reliable SGRs; therefore, no SGRs were calculated for that housing type.

Sources

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

Townhome/Duplex and 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 Townhome/Duplex units and Multi-Family 2+ bedroom units (or Multi-Family units with one bedroom or less). Consistent with the methodology used in the 2016, 2017, 2018, 2020, and 2022 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 2022 capital facilities plans (the last County-adopted set of plans) of the other school districts in Snohomish County. The District is applying these same rates to Townhome/Duplex units as those units previously were included by most districts within the Multi-Family 2+ bedroom data set. These averages reflect recent development trends in Snohomish County. As a comparison to Snohomish County, 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 apply the 2022 calculated average* as an estimate of student generation from new Townhome/Duplex units and Multi-Family 2+ bedroom units within the Sultan School District.

The resulting average student generation rates are as follows:

| | | | |
|---------------------------------|--------------|--------------|--------------|
| Multi-Family 2+ BR Rates | K-5 | 6-8 | 9-12 |
| | 0.094 | 0.054 | 0.053 |

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.

*Excluding certain anomalies of districts with high multi-family rates (Everett, Mukilteo) or low multi-family rates (Monroe).

APPENDIX C

| SCHOOL IMPACT FEE CALCULATIONS | | | | | | | | | |
|---|----------------------------|---------------|----------|-----------------|----------------|----------------|-----------------|-----------------|-----------------|
| DISTRICT | Sultan School District | | | | | | | | |
| YEAR | 2024 | | | | | | | | |
| School Site Acquisition Cost: | | | | | | | | | |
| ((AcresxCost per Acre)/Facility Capacity)xStudent Generation Factor | | | | | | | | | |
| | Facility | Cost/ | Facility | Student | Student | Student | Cost/ | Cost/ | Cost/ |
| | Acreage | Acre | Capacity | SFR | TH/Duplex | MFR (2+) | SFR | TH/Duplex | MFR (2+) |
| Elementary | 15.00 | \$ 9,100.00 | 450 | 0.227 | 0.094 | 0.094 | \$69 | \$29 | \$29 |
| Middle | 20.00 | \$ - | 600 | 0.079 | 0.054 | 0.054 | \$0 | \$0 | \$0 |
| High | 34.00 | \$ 9,100.00 | 800 | 0.098 | 0.053 | 0.053 | \$38 | \$20 | \$20 |
| | | | | | | TOTAL | \$107 | \$49 | \$49 |
| School Construction Cost: | | | | | | | | | |
| ((Facility Cost/Facility Capacity)xStudent Generation Factor)x(permanent/Total Sq Ft) | | | | | | | | | |
| | %Perm/ | Facility | Facility | Student | Student | Student | Cost/ | Cost/ | Cost/ |
| | Total Sq.Ft. | Cost | Capacity | SFR | TH/Duplex | MFR (2+) | SFR | TH/Duplex | MFR (2+) |
| Elementary | 83.00% | \$ 50,200,000 | 450 | 0.227 | 0.094 | 0.094 | \$21,018 | \$8,704 | \$8,704 |
| Middle | 83.00% | \$ 31,633,000 | 256 | 0.079 | 0.054 | 0.054 | \$8,102 | \$5,538 | \$5,538 |
| High | 83.00% | \$ 98,853,000 | 800 | 0.098 | 0.053 | 0.053 | \$10,051 | \$5,436 | \$5,436 |
| | | | | | | TOTAL | \$39,171 | \$19,677 | \$19,677 |
| Temporary Facility Cost: | | | | | | | | | |
| ((Facility Cost/Facility Capacity)xStudent Generation Factor)x(Temporary/Total Square Feet) | | | | | | | | | |
| | %Temp/ | Facility | Facility | Student | Student | Student | Cost/ | Cost/ | Cost/ |
| | Total Sq.Ft. | Cost | Size | SFR | TH/Duplex | MFR (2+) | SFR | TH/Duplex | MFR (2+) |
| Elementary | 17.00% | \$ - | 25 | 0.227 | 0.094 | 0.094 | \$0 | \$0 | \$0 |
| Middle | 17.00% | \$ - | 30 | 0.079 | 0.054 | 0.054 | \$0 | \$0 | \$0 |
| High | 17.00% | \$ - | 32 | 0.098 | 0.053 | 0.053 | \$0 | \$0 | \$0 |
| | | | | | | TOTAL | \$0 | \$0 | \$0 |
| State School Construction Funding Assistance Credit: | | | | | | | | | |
| CCA X SPI Square Footage X District Funding Assistance % X Student Factor | | | | | | | | | |
| | CCA | SPI | Funding | Student | Student | Student | Cost/ | Cost/ | Cost/ |
| | | Footage | Asst % | SFR | TH/Duplex | MFR (2+) | SFR | TH/Duplex | MFR (2+) |
| Elementary | \$ 375.00 | 90 | 61.68% | 0.227 | 0.094 | 0.094 | \$4,725 | \$1,957 | \$1,957 |
| Middle | \$ 375.00 | 108 | | 0.079 | 0.054 | 0.054 | \$0 | \$0 | \$0 |
| High | \$ 375.00 | 130 | 61.68% | 0.098 | 0.053 | 0.053 | \$2,947 | \$1,594 | \$1,594 |
| | | | | | | TOTAL | \$7,672 | \$3,550 | \$3,550 |
| Tax Payment Credit: | | | | | | | | | |
| | | | | | | | SFR | TH/Duplex | MFR (2+) |
| Average Assessed Value | | | | | | | \$470,692 | \$242,411 | \$242,411 |
| Capital Bond Interest Rate | | | | | | | 3.48% | 3.48% | 3.48% |
| Net Present Value of Average Dwelling | | | | | | | \$3,918,509 | \$2,018,070 | \$2,018,070 |
| Years Amortized | | | | | | | 10 | 10 | 10 |
| Property Tax Levy Rate | | | | | | | \$0.92 | \$0.92 | \$0.92 |
| Present Value of Revenue Stream | | | | | | | \$3,602 | \$1,855 | \$1,855 |
| Fee Summary: | | | | | | | | | |
| | | | | Single | Townhome | Multi- | | | |
| | | | | Family | Duplex | Family (2+) | | | |
| | Site Acquisition Costs | | | \$107 | \$49 | \$49 | | | |
| | Permanent Facility Cost | | | \$39,171 | \$19,677 | \$19,677 | | | |
| | Temporary Facility Cost | | | \$0 | \$0 | \$0 | | | |
| | State SCFA Credit | | | (\$7,672) | (\$3,550) | (\$3,550) | | | |
| | Tax Payment Credit | | | (\$3,602) | (\$1,855) | (\$1,855) | | | |
| | FEE (AS CALCULATED) | | | \$28,004 | \$14,321 | \$14,321 | | | |
| | Fee (AS DISCOUNTED) | | | \$14,002 | \$7,161 | \$7,161 | | | |