
ARLINGTON PUBLIC SCHOOLS
CAPITAL FACILITIES PLAN
2022-2027



Adopted: August 8, 2022

ARLINGTON PUBLIC SCHOOLS
CAPITAL FACILITIES PLAN
2022-2027

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Approved by the Board of Directors on August 8, 2022

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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 (2022-2027).

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.

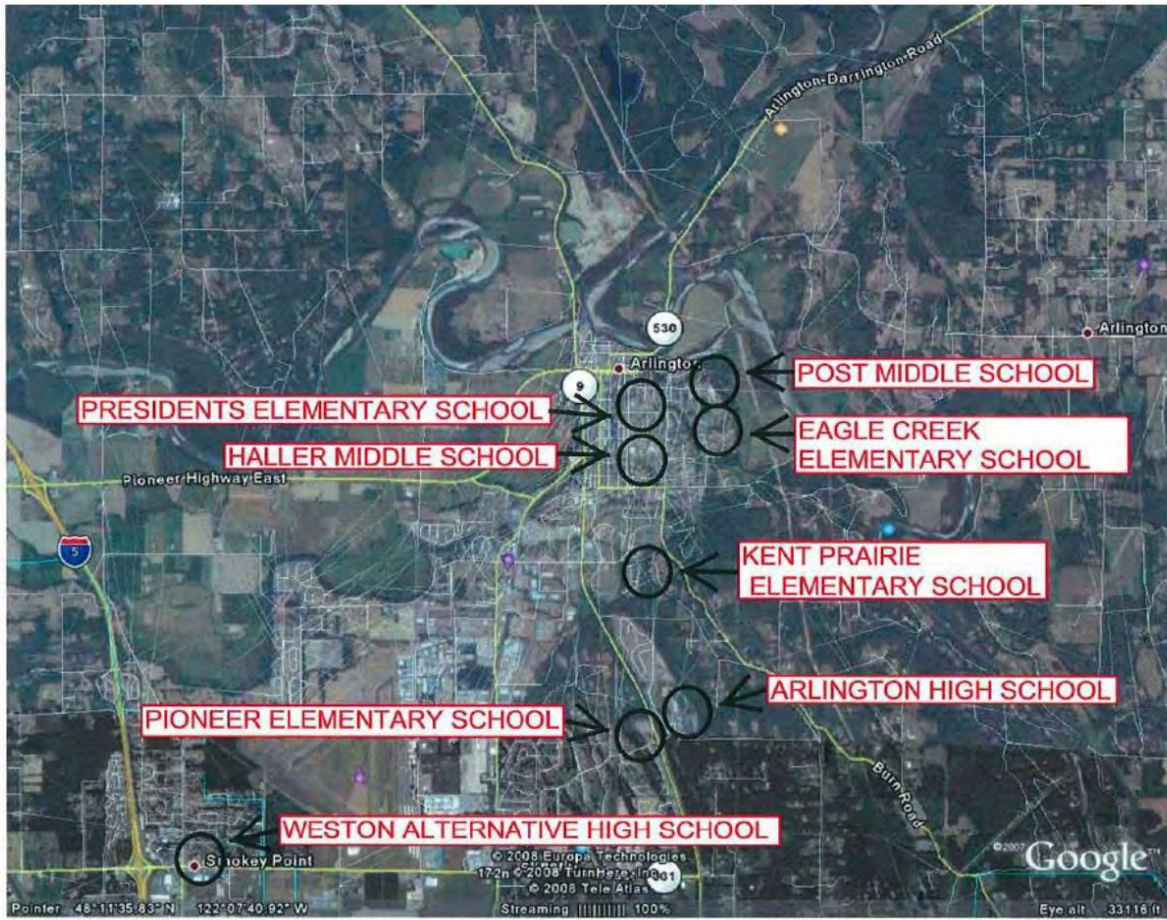
B. Overview of Arlington Public Schools

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 5,374 (October 1, 2021 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 and continuing into the fall of 2021, most notably at the K-5 level, as families considered alternative education opportunities during the pandemic. With the return to in-person learning, the District anticipates that enrollment will return to pre-pandemic projections and continue to grow over the six-year planning period. This 2022 update builds on the 2020 CFP and identifies a growth-related projects at the middle school level and anticipates the completion of an addition at the high school in the summer of 2022.

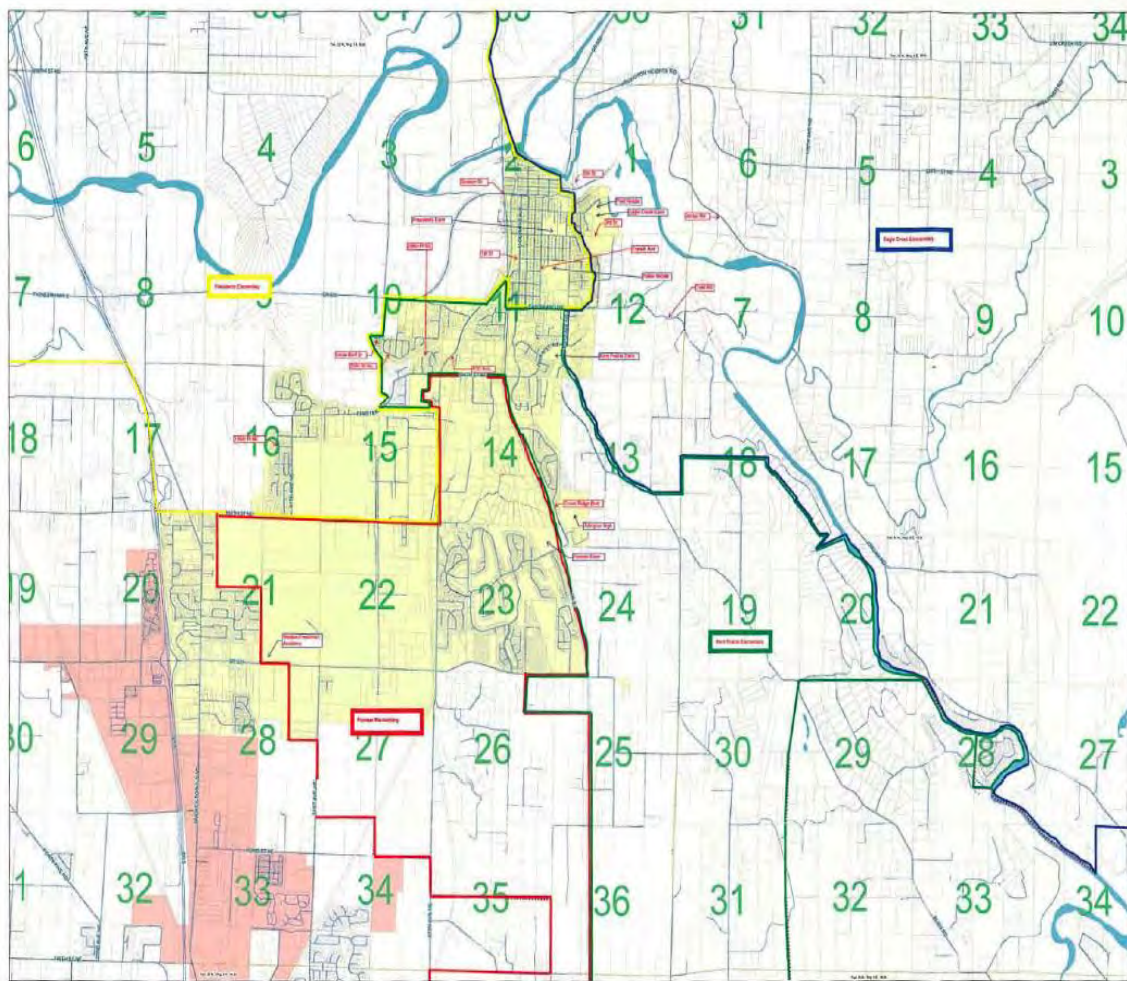
FIGURE 1 - MAP OF FACILITIES



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



Arlington School District # 16

2



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 2019-20 and 2020-21, the District's compliance with the minimum level of service was as follows

2019-20 School Year						
LOS Standard	MINIMUM LOS# Elementary	REPORTED LOS Elementary	MINIMUM LOS Middle	REPORTED LOS Middle	MINIMUM LOS High	REPORTED LOS High
	26	22.48	26	20.04	32	33.68

* 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.

2020-21 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	19.19	32	32.19

* 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	256,181	53	1,780	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 thirteen relocatable classrooms at various school sites throughout the District to provide additional interim capacity (an additional 10 relocatables are located at Stillaguamish Valley School). A typical relocatable classroom can provide capacity for a full-size class of students. The District's relocatable classrooms have adequate useful remaining life and are evaluated regularly. Current use for the 2022-19 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	2	58
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	13	345

C. Support Facilities

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

Table 5
Support Facility Inventory

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

Additionally, the District leases a 33,000 square foot building on a 10 acre site near the Arlington Airport. This remodeled building houses the (alternative) Weston High School. Since this site houses only alternative educational programs, the building’s capacity is not included as part of the District’s eligible facility 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 2022-2027*

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 has worked with an outside demographer, FLO Analytics, to obtain enrollment projections that consider 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. Using the District's enrollment projections, the District anticipates an increase in enrollment increase of approximately 14.5% by the 2027-28 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 2014 and 2019, the District's enrollment constituted 17.2% of the total population in the District. In 2020, the District's enrollment constituted 15.60% of the total population in the District. The District is choosing to rely on the assumption that District enrollment will follow the 2014-2019 pattern of 17.2%. Using this percentage, a total enrollment of 6,450 HC students is projected in 2027.

**Table 6
Projected Student Enrollment
2021-2027**

								Change	% Change
Projection	2021*	2022	2023	2024	2025	2026	2027	21-27	21-27
District	5,374	5,545	5,678	5,861	5,927	6,039	6,135	779	14.5%
OFM/County	5,374	5,553	5,732	5,911	6,090	6,269	6,450	1,076	20.02%

* Actual October 2021 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. 2035 Enrollment Projections

Student enrollment projections beyond 2027 are highly speculative. Based on OFM/County data for 2027 and an estimated student-to-population ratio of 17.2%, 8,084 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)	3,408
Middle School (6-8)	1,943
High School (9-12)	2,733
TOTAL (K-12)	8,084

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 (2022-2027). 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	2027 Projected Unhoused Students - Total	2027 Projected Unhoused Students – Growth Post-2021
Elementary (K-5)	286	286
Middle School (6-8)	37	37
High School (9-12)	37	142
TOTAL (K-12)	360	465

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 2027 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
2022 - 2027

Elementary School Surplus/Deficiency

Elementary	2021	2022	2023	2024	2025	2026	2027
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	2,265	2,399	2,507	2,606	2,644	2,701	2,788
Surplus (Deficiency)	237	103	(5)	(104)	(142)	(199)	(286)

Middle School Surplus/Deficiency

Middle	2021	2022	2023	2024	2025	2026	2027
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	1,279	1,289	1,284	1,278	1,366	1,393	1,406
Surplus (Deficiency)	77	80	85	91	3	126	113

^Replacement and Expansion of Post Middle School

High School Surplus/Deficiency

High	2021	2022	2023	2024	2025	2026	2027
Existing Capacity	1,780	1,780	2,036	2,036	2,036	2,036	2,036
Added Capacity		256^					
Total Capacity	1,780	2,036	2,036	2,036	2,036	2,036	2,036
Enrollment	1,817	1,858	1,883	1,977	1,917	1,945	1,959
Surplus (Deficiency)	(37)	178	153	59	119	91	77

^Arlington High School Addition (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.
- Expansion of Arlington High School would add 256 additional student seats (anticipated to be complete in summer 2022, with remaining available capacity anticipated during the six-year planning period).

Temporary Capacity Projects:

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

Property Acquisition:

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

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

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

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

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

B. Financing Sources

1. General Obligation Bonds/Capital Levies

Bonds are typically used to fund construction of new schools and other capital improvement projects, and require a 60% voter approval. Capital levies require a 50% voter approval and can be used for certain capital improvement projects. In February 2020, the District presented a \$25.1 million capital levy and \$107.5 million bond measure to its voters. The voters approved the capital levy, which includes, among other things, funding for the new classrooms and a science, technology, engineering, art and math (STEAM) workshop wing addition at Arlington High School. The bond proposal included funding for the construction of a new middle school to replace Post Middle School. The bond did not achieve the required 60% minimum for passage. Subject to future Board action, the District anticipates presenting a bond proposal to the voters in 2024, 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 funds for specific capital projects based on a prioritization system. The District is currently eligible for state school construction assistance funds at the 61.26% level for eligible projects.

3. Impact Fees

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

C. Six-Year Financing Plan

Table 9 demonstrates how the District intends to fund new construction and improvements to school facilities for the years 2022-2027. The financing components include capital levy funds, future bond revenue, impact fees, and other future sources. Projects and portions of projects which remedy existing deficiencies are not appropriate for impact fee funding. Thus, impact fees will not be used to finance projects or portions of projects which do not add capacity or which remedy existing deficiencies.

Table 9
Capital Facilities Financing Plan

Improvements Adding Permanent Capacity (Costs in Millions)

Project	2022	2023	2024	2025	2026	2027	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			\$33.200	\$33.200	\$33.200		\$99.600	X	X	X
High School										
Arlington High School Expansion	\$8.816*							X		X

Improvements Adding Temporary Capacity (Costs in Millions)

Project	2022	2023	2024	2025	2026	2027	Total Cost	Bonds/ Levy/Other Local	State Match	Impact Fees
Relocatables		\$0.600	\$0.600	\$0.600			\$1.800	X		X

Noncapacity Improvements (Costs in Millions)

Project	2022	2023	2024	2025	2026	2027	Total Cost	Bonds/ Levy/Other Local	State Match	Impact Fees
Various Schools (all grade levels)										
Security improvements; pedestrian safety improvements; energy efficiency measures; miscellaneous improvements	\$17.117*							X		

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

SECTION 7 SCHOOL IMPACT FEES

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

A. School Impact Fees in Snohomish County

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

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

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

B. Methodology and Variables Used to Calculate School Impact Fees

Impact fees are calculated utilizing the formula in the Snohomish County Impact Fee Ordinance. The resulting figures are based on the District’s cost per dwelling unit to purchase land for school sites, make site improvements, construct schools, and purchase/install relocatable facilities that add interim capacity needed to serve new development.

A student factor (or student generation rate) is used to identify the average cost per dwelling unit by measuring the average number of students generated by each housing type (single-family dwellings and multi-family dwellings of one bedroom and two bedrooms or more). A description of the student methodology is contained in Appendix B. The District 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.

As required under the GMA, credits are applied in the formula to account for State School Construction Assistance funds to be reimbursed to the District and projected future property taxes to be paid by the dwelling unit. The costs of projects that do not add capacity are not included in the impact fee calculations. Furthermore, because the impact fee formula calculates a “cost per dwelling unit”, an identical fee is generated regardless of whether the total new capacity project costs are used in the calculation or whether the District only uses the percentage of the total new capacity project costs allocated to the Districts growth-related needs, as demonstrated in Table 8-A. For purposes of this Plan, the District has chosen to use the full project costs in the fee formula. Furthermore, impact fees will not be used to address existing deficiencies. See Table 9 for a complete identification of funding sources.

The following projects are included in the impact fee calculation:

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

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

C. *Proposed Arlington School District Impact Fee Schedule*

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

Table 10
School Impact Fees
2022

Housing Type	Impact Fee Per Dwelling Unit
Single Family	\$4,002
Multi-Family (1 Bedroom)	No fee (\$0)
Multi-Family (2+ Bedroom)	\$2,328

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

Table 11: Impact Fee Variables

Student Generation Factors – Single Family			Average Site Cost/Acre	N/A
Elementary		.206		
Middle		.097		
Senior		.108		
Total		.412		
Student Generation Factors – Multi Family (1 Bdrm)			Temporary Facility Capacity	22
Elementary		.018	Capacity	
Middle		.000	Cost	\$300,000
Senior		.000		
Total		.018		
Student Generation Factors – Multi Family (2+ Bdrm)			State Match Credit	61.26%
Elementary		.092	Current State Match Percentage	
Middle		.051		
Senior		.065		
Total		.208		
Projected Student Capacity per Facility			Construction Cost Allocation	246.83
Arlington HS (expansion) - 256			Current CCA	
Post Middle School (replacement and expansion) – 150 added capacity (for total new capacity of 907)				
Required Site Acreage per Facility			District Average Assessed Value	\$496,438
Facility Construction/Cost Average			Single Family Residence	
Arlington HS (expansion)		\$8,186,671	District Average Assessed Value	\$169,461
Post Middle School (repl/expansion)		\$99,600,0000	Multi Family (1 Bedroom)	
			Multi Family (2+ Bedroom)	\$239,226
			SPI Square Footage per Student	
			Elementary	90
			Middle	108
			High	130
			District Debt Service Tax Rate for Bonds/Capital Levy	
			Current/\$1,000	\$0.9964
Permanent Facility Square Footage			General Obligation Bond Interest Rate	2.45%
Elementary		237,231	Bond Buyer Index (avg 2/22)	
Middle		162,325		
Senior		256,181		
Total	98.61%	655,737	Developer Provided Sites/Facilities	
Temporary Facility Square Footage			Value	0
Elementary		5,034	Dwelling Units	0
Middle		3,356		
Senior		839		
Total	1.39%	9,229		
Total Facility Square Footage				
Elementary		242,265		
Middle		165,681		
Senior		257,020		
Total	100.00%	664,966		

APPENDIX A

POPULATION AND ENROLLMENT DATA



ICOS

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

Snohomish/Arlington(31016)

Grade	--- ACTUAL ENROLLMENTS ON OCTOBER 1st ---						AVERAGE % SURVIVAL	--- PROJECTED ENROLLMENTS ---					
	2016	2017	2018	2019	2020	2021		2022	2023	2024	2025	2026	2027
Kindergarten	355	390	386	426	330	335		346	339	333	326	319	312
Grade 1	383	375	409	403	392	350	102.59%	344	355	348	342	334	327
Grade 2	396	394	394	414	360	404	100.30%	351	345	356	349	343	335
Grade 3	381	415	423	406	385	389	103.24%	417	362	356	368	360	354
Grade 4	429	409	423	432	375	388	100.90%	393	421	365	359	371	363
Grade 5	382	452	424	437	405	381	101.53%	394	399	427	371	364	377
Grade 6	428	417	473	441	424	434	104.39%	398	411	417	446	387	380
K-6 Sub-Total	2,754	2,852	2,932	2,959	2,671	2,681		2,643	2,632	2,602	2,561	2,478	2,448
Grade 7	448	443	416	486	398	431	99.57%	432	396	409	415	444	385
Grade 8	416	440	458	416	464	414	100.21%	432	433	397	410	416	445
7-8 Sub-Total	864	883	874	902	862	845		864	829	806	825	860	830
Grade 9	453	427	457	489	402	495	103.31%	428	446	447	410	424	430
Grade 10	455	444	435	463	468	404	99.47%	492	426	444	445	408	422
Grade 11	408	429	422	402	430	448	94.06%	380	463	401	418	419	384
Grade 12	444	421	430	431	406	432	101.39%	454	385	469	407	424	425
9-12 Sub-Total	1,760	1,721	1,744	1,785	1,706	1,779		1,754	1,720	1,761	1,680	1,675	1,661
DISTRICT K-12 TOTAL	5,378	5,456	5,550	5,646	5,239	5,305		5,261	5,181	5,169	5,066	5,013	4,939

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

DISTRICT DEMOGRAPHER PROJECTIONS **2022 FLO ANALYTICS**

Grade	2021	2022	2023	2024	2025	2026	2027	2028	2029	2030	2031
K	336	424	421	419	403	392	401	407	415	416	417
1	357	363	450	447	444	427	418	425	431	440	442
2	409	380	378	467	463	460	446	434	442	448	458
3	390	430	404	401	495	491	491	473	461	469	476
4	390	399	440	414	410	506	505	503	485	473	481
5	383	403	414	457	429	424	527	524	522	504	491
6	440	400	424	433	480	450	446	559	559	561	541
7	433	445	407	431	444	490	460	458	576	576	574
8	419	443	453	414	442	453	500	472	472	593	589
9	497	450	476	490	448	475	486	537	508	505	633
10	405	512	465	495	504	464	492	505	560	528	530
11	453	414	499	456	481	492	454	482	495	548	522
12	462	482	442	536	484	514	527	486	517	530	592
K-5	2,265	2,399	2,507	2,606	2,644	2,701	2,788	2,766	2,756	2,750	2,765
7-8	1,292	1,289	1,284	1,278	1,366	1,393	1,406	1,489	1,607	1,731	1,704
9-12	<u>1,817</u>	<u>1,858</u>	<u>1,883</u>	<u>1,977</u>	<u>1,917</u>	<u>1,945</u>	<u>1,959</u>	<u>2,011</u>	<u>2,080</u>	<u>2,111</u>	<u>2,277</u>
K-12	5,374	5,545	5,674	5,861	5,927	6,039	6,153	6,265	6,443	6,592	6,746

Total Attendance
(Building
Attendance)

APPENDIX B

STUDENT GENERATION FACTOR REVIEW



MEMORANDUM

To: Brian Lewis
Executive Director of Operations
Arlington Public Schools

Date: March 18, 2022

From: Tyler Vick
Managing Director

Benjamin Maloney
Demographer/Data Analyst

Project No.: F2116.01.002

Re: **Student Generation Report—Arlington Public Schools**

At the request of the Arlington Public Schools (District/APS), FLO Analytics (FLO) has prepared an analysis of student generation rates (SGRs) resulting from recent (2017 to 2021) residential construction within the district. This document details the methodology FLO used to create the SGRs for APS; an analysis of recent single-family (SF) and multifamily (MF) construction; and SGRs for SF housing, 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 developments that were erroneously listed as having been completed between 2017 and 2021. These consisted of two mobile home sites that have been present since at least 2010 and a large MF site that was not completed prior to the end of 2021 (Pilchuck Village). 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 636 SF units and five MF buildings completed between 2017 and 2021. While the majority of the SF construction consisted of units classified as "Single Family Residence – Detached" (528 units), a variety of units with other SF use codes were also constructed, including duplexes, condominiums, manufactured homes (owned and leased), and approximately 150 units in a mobile home park. While less active than SF construction, MF construction resulted in 456 new units. About 64 percent (293 units) of these new MF units were 2+ BR units, while the remainder (163 units) were 0–1 BR units.

All students (grades kindergarten [K] through 12) in the October 18, 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 636 SF units were compared with the 5,374 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	26	0.041
1	18	0.028
2	28	0.044
3	21	0.033
4	15	0.024
5	23	0.036
6	18	0.028
7	24	0.038
8	20	0.031
9	21	0.033
10	17	0.027
11	15	0.024
12	16	0.025
K–5	108	0.206
6–8	65	0.097
9–12	73	0.108
K–12	246	0.412

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

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, 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 five 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 Park 77, Emory Lofts A and B, and Centennial Park. Bedroom counts were ascertained for seven townhouse units (all are 2+ BR) located on the north side of the city along W Burke Avenue; however, no students reside within these units.

Multifamily 0–1 BR Rates

FLO calculated the MF 0–1 BR SGRs by comparing data on 0–1 BR multifamily 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 163 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	1	0.006
1	2	0.012
2	0	0.000
3	0	0.000
4	0	0.000
5	0	0.000
6	0	0.000
7	0	0.000
8	0	0.000
9	0	0.000
10	0	0.000
11	0	0.000
12	0	0.000
K–5	3	0.018
6–8	0	0.000
9–12	0	0.000
K–12	3	0.018

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 293 2+ BR units in total 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	4	0.014
1	8	0.027
2	5	0.017
3	2	0.007
4	4	0.014
5	4	0.014
6	4	0.014
7	5	0.017
8	6	0.020
9	4	0.014
10	5	0.017
11	7	0.024
12	3	0.010
K-5	27	0.092
6-8	15	0.051
9-12	19	0.065
K-12	61	0.208

Summary of Student Generation Rates

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

Type	K-5	6-8	9-12	K-12
Single-family	0.206	0.097	0.108	0.412
Multi-family 0-1 BR	0.018	0.000	0.000	0.018
Multi-family 2+ BR	0.092	0.051	0.065	0.208

Summary of 2017-2021 Multifamily Developments

Table 5. Summary of Multifamily Developments by Elementary School Boundary

Building Name	Number of Units	School
Unidentified Townhouses	7	Presidents ES
Park 77	182	Kent Prairie ES
Emory Lofts B	25	Presidents ES
Emory Lofts A	40	Presidents ES
Centennial Park	202	Pioneer ES

Summary of Single-Family Housing Built by Year

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

2017	2018	2019	2020	2021
130	296	68	90	50

APPENDIX C

SCHOOL IMPACT FEE CALCULATIONS

SCHOOL IMPACT FEE CALCULATIONS									
DISTRICT	Arlington School District								
YEAR	2022								
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	MFR (1)	MFR (2+)	SFR	MFR (1)	MFR (2+)
Elementary	10.00	\$ -	550	0.206	0.018	0.092	\$0	\$0	\$0
Middle	20.00	\$ -	907	0.097	0.000	0.051	\$0	\$0	\$0
High	40.00	\$ -	256	0.108	0.000	0.065	\$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	MFR (1)	MFR (2+)	SFR	MFR (1)	MFR (2+)
Elementary	98.61%	\$ -	550	0.206	0.018	0.092	\$0	\$0	\$0
Middle	98.61%	\$ 99,600,000	907	0.097	0.000	0.051	\$10,504	\$0	\$5,523
High	98.61%	\$ 8,186,671	256	0.108	0.000	0.065	\$3,406	\$0	\$2,050
						TOTAL	\$13,910	\$0	\$7,572
Temporary Facility Cost:									
(((Facility Cost/Facility Capacity)xStudent Generation Factor)x(Temporary/Total Square Feet)									
	%Temp/	Facility	Facility	Student	Student	Student	Cost/	Cost/	Cost/
	Total Sq.Ft.	Cost	Size	SFR	MFR (1)	MFR (2+)	SFR	MFR (1)	MFR (2+)
Elementary	1.39%	\$ 150,000.00	22	0.206	0.018	0.092	\$20	\$2	\$9
Middle	1.39%	\$ -	28	0.097	0.000	0.051	\$0	\$0	\$0
High	1.39%	\$ -	30	0.108	0.000	0.065	\$0	\$0	\$0
						TOTAL	\$20	\$2	\$9
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	MFR (1)	MFR (2+)	SFR	MFR (1)	MFR (2+)
Elementary	\$ 246.83	90	0.00%	0.206	0.018	0.092	\$0	\$0	\$0
Middle	\$ 246.83	108	61.26%	0.097	0.000	0.051	\$1,584	\$0	\$833
High	\$ 246.83	130	0.00%	0.108	0.000	0.065	\$0	\$0	\$0
						TOTAL	\$1,584	\$0	\$833
Tax Payment Credit:							SFR	MFR (1)	MFR (2+)
Average Assessed Value							\$496,438	\$169,461	\$239,226
Capital Bond Interest Rate							2.45%	2.45%	2.45%
Net Present Value of Average Dwelling							\$4,356,104	\$1,486,973	\$2,099,141
Years Amortized							10	10	10
Property Tax Levy Rate							\$1.00	\$1.00	\$1.00
	Present Value of Revenue Stream						\$4,340	\$1,482	\$2,092
Fee Summary:				Single	Multi-	Multi-			
				Family	Family (1)	Family (2+)			
Site Acquisition Costs				\$0	\$0	\$0			
Permanent Facility Cost				\$13,910	\$0	\$7,572			
Temporary Facility Cost				\$20	\$2	\$9			
State SCFA Credit				(\$1,584)	\$0	(\$833)			
Tax Payment Credit				(\$4,340)	(\$1,482)	(\$2,092)			
FEE (AS CALCULATED)				\$8,005	(\$1,480)	\$4,657			
Fee (AS DISCOUNTED)				\$4,002	\$0	\$2,328			



ALDERWOOD MIDDLE SCHOOL

2022 - 2027 CAPITAL FACILITIES PLAN



Edmonds
SCHOOL DISTRICT

Each student learning, every day!

CAPITAL FACILITIES PLAN EDMONDS SCHOOL DISTRICT

SCHOOL BOARD MEMBERS

Nancy Katims, President

Director District 5

Deborah Kilgore, Vice President

Director District 4

Carin Chase, Legislative Representative

Director District 1

Gary Noble

Director District 3

Keith Smith

Director District 2

**SUPERINTENDENT
Dr. Rebecca Miner**

Adopted by Board of Directors, September 13, 2022

For information on the Edmonds School District
Capital Facilities Plan, Contact Facilities
Operations at (425) 431-7332.

This document is also available at: www.edmonds.wednet.edu

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 (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-two years (2044). It also meets the planning requirements of the State Growth Management Act (GMA), the County's GMA Comprehensive Plan and County Code (SCC 30.66C). A more detailed schedule and financing program for capital improvements over the next six years, (2022-2027) is also included.

In accordance with 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 OFM population forecasts used in the county's comprehensive plan.
- Inventory of Existing Facilities
- The proposed locations and capacities of expanded or new capital facilities.
- A six-year plan for financing capital facilities.

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

Section 8 of this CFP addresses development fees, mitigation, and other sources of funding from developers. Impact fees are not anticipated during this 2022-2027 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 2022-24 biennium.

Overview of Edmonds School District

The District is the largest school district in the County, and the eleventh largest of Washington's 294 public school systems. The District covers an area of 36 square miles. It currently serves a total student population (headcount, including Kindergarten) of 19,653¹, as of October 2021 with twenty schools serving grades K-6; two schools serving grades K-8; four schools serving grades 7-8; five schools serving grades 9-12; one resource center for grades K-12 home-schooled students, one e-learning program, and one District program for students with severe disabilities. The grade configuration of schools has changed over time in response to the desires of the community, needs of the educational program and variability in financial resources available for staffing classrooms. These changes are made after a process that allows for community participation, with ultimate approval by the Board of Directors.

Planning Objectives

The objective of this Capital Facilities Plan is to assess existing school facility capacities, forecast future facility needs within six-year and approximate twenty-year planning horizons, and to articulate a facility and financing plan to address those needs. This CFP replaces and supersedes the District's 2020 Capital Facilities Plan. The current projections cycle is 2022 to 2027.

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.

¹ Headcount differs from FTE in that the figure reflects total number of students served by District educational programming, while FTE is Full Time Equivalent and adjusts for students who attend part time. Office of the Superintendent of Public Instruction Report No. 1251 H, (December, 2017)

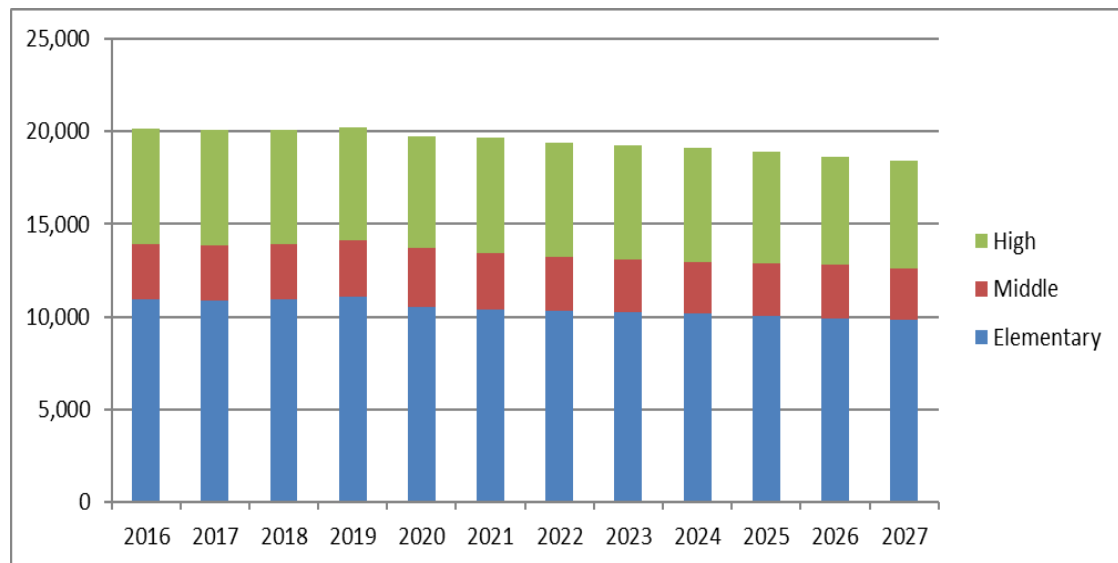
The District monitors proposed new residential growth (e.g. the County Plan update) for impacts and implications to its facility planning and educational programs. The District comments, as needed, on specific proposed new developments, to ensure appropriate provisions for students are factored into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

SECTION 2 -- STUDENT ENROLLMENT TRENDS AND PROJECTIONS

Historic Trends

Figure 1 - Enrollment History



Student enrollment in the District reached its highest levels during the late 1960s and early 1970s, with 28,076 students attending District schools in 1970. Enrollment declined steadily between 1971 and 1985, reaching its lowest level in 1985 at 16,118 students. Enrollment then increased steadily from 1987 through 1998, staying fairly even until 2002 when it gradually declined until 2012. Since then, enrollment has levelled off at between 19-20,000. Enrollment in October 2022 was 19,407.

Future Forecasts

In previous capital facility plans, one of three forecast methodologies were used: one from Edmonds School District (FloAnalytics)²; a second by a

Table 1 — Comparison of Student Enrollment Projections Edmonds School District 2021-2027							
Source	2021	2022	2023	2024	2025	2026	2027
Actual	19,653	19,407					
OSPI			19,243	19,094	18,885	18,603	18,415
FloAnalytics			21,180	21,353	21,562	21,353	21,562
Ratio Method			19,989	20,542	20,224	19,978	19,989
		Average	20,212	20,224	20,224	19,978	19,989

former consultant to the District (Kendrick) and a third from the Washington State Office of Superintendent of Public Instruction (OSPI). In 2020 the current CFP estimated a growth in enrollment from 20,512 in 2020 to 21,562 in 2025, an increase of 5.1%. For this Capital Facilities Plan, the 2022 FLO Analytics and the OSPI enrollment forecasts have been averaged (Table 1). Table 2 shows the estimated grade level enrollments based on that average.

**Table 2 — Projected Student Enrollment by Grade Span
Edmonds School District 2021-2027**

Grade Span	Actual		Projected					Change 2021- 27	% Change
	2021	2022	2023	2024	2025	2026	2027		
Elementary (K-6)	10,394	10,288	10,772	10,776	10,731	10,618	10,643	249	2.40%
Middle School (7-8)	3,054	2,950	3,003	2,967	3,091	3,118	3,037	-17	-0.56%
High School (9-12)	6,205	6,169	6,436	6,481	6,402	6,243	6,309	104	1.68%
Total	19,653	19,407	20,211	20,224	20,224	19,979	19,989	336	1.71%

² Memorandum: FLO Analytics, to Lydia Sellie, February 11, 2022.

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 2021, 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.

Ratio Forecasting Method

The County's population estimate was used for the 2044 long range enrollment estimate, using a Ratio Method, where assumptions are made of what proportion of the official population forecasts will be students.

Past ratio trends (actual enrollments as a percentage of official Census or other records) were used as official data points using OSPI "actual" enrollments, decennial U.S. Census population totals with straight-line ratio projections between those data points. The official ratio trend was downward from 2000 to the present. The ratio of students (OSPI) to actual population (Census) in 2000 was 15.46%. The 2010 ratio was 13.05%; and in 2020 was 11.1%.

Table 3: Student/Population Ratios

	Population	Enrollment	Ratio
2021	176,754	19,653	9.87%
2027	202,610	19,989	9.87%
2028	206,202	20,542	9.96%
2044	263,674	30,323	11.50%

For future planning purposes, the District assumes that the trend will increase from the forecasted 2027 low point (9.9%) to 11.5% by 2044. This would reflect a current County policy of increasing densities in

the Urban Growth Area. Applying that ratio to the County's official 2044 population estimate of 263,674, the enrollment estimate for that year is 30,323 (Table 3).

Student Generation Rates

Student Generation Rates (SGR's) are the average number of students by grade span (elementary, middle, and high school) typically generated by housing type. Student Generation Rates are calculated based on a survey of all new residential units permitted by the jurisdictions within the school district during the most recent five to eight-year period. For this CFP estimates of rates were provided in the Flow Analytics report. The 2018 Kendrick Update (Page 40) reported an estimated SGR of about .32 students for each new home and .14 students per apartment.

Table 4
Enrollment Estimates

Grade Span	2022 Actual Student Headcount	2027 Projected Student Headcount	2044 Projected Headcount
Elementary (K-6)	10,288	10,643	16,242
Middle School (7-8)	2,950	3,037	4,603
High School (9-12)	6,169	6,309	9,478
Total	19,407	19,989	30,323

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

SECTION 3 -- DISTRICT EDUCATIONAL FACILITY STANDARDS

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

Program factors, as well as government mandates, funding or community expectations, affect how classroom space is used. The District's basic educational program is a fully integrated curriculum offering instruction to meet Federal, State, and District mandates. In addition, the District's basic educational program is supplemented by special programs, such as music, intervention programs, and preschool programs that are developed in response to local community choices.

Special programs require classroom space that may reduce the overall capacity of buildings. Some students, for example, leave their regular classroom for a short period of time to receive instruction in special programs. Newer schools within the District have been designed to accommodate most of these programs. Older schools, however, often require space modifications to accommodate special programs, and, in some circumstances, these modifications may reduce the classroom capacity and, therefore, the student capacity of these schools.

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

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

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

The District educational program standards, as they relate to class size and facility design capacity, are outlined below for the elementary, middle and high school grade levels.

Educational Facility Class Size and Design Capacity Standards for Elementary Schools

- The District's student to classroom teacher ratio for staffing purposes for grades K-1 is 21.5 students, 24 students for grades 2-6.
- Some local-choice educational opportunities for students will be provided in self-contained classrooms designated as resource or program-specific classrooms (e.g. computer labs, music rooms, band rooms, remediation rooms, learning assistance programs).
- Current capacity for new elementary schools is based upon a District-wide Educational Specification which assigns a range of approximately 21-27 classrooms for K-6 or K-8 basic educational program and two or more classrooms for self-contained resource or program-specific activities.
- The actual capacity of individual schools may be lower than the maximum capacity depending on the local educational program offered at each school.

The application of these classroom staffing ratios and capacity standards to the District's current educational program causes average classroom utilization to be approximately 90%.

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

- The District utilizes available teaching stations in our secondary schools from between the rates of 83% to over 100% with a class size average of 25.6 students at grades 7 and 8, and 24.8 for grades 9 through 12. At 83%, utilization, a teacher's classroom is open one period without students for teacher planning. As the building increases in student population, and fewer classrooms are able to be freed up during the day for planning, higher utilization percentages are seen. In the most difficult cases, the building is over capacity and is using spaces not originally designed for instruction. In the event of overcrowding, the District may remediate by using facilities differently or continue adding relocatable classrooms.
- Actual capacity and actual enrollment of individual schools may vary. Actual capacity may be lower than the design might suggest depending on the total local educational programs offered at each school and the size and configuration of older schools. Likewise, actual capacity may be higher than the design capacity based on the design of the District's educational program and the length of the educational day.

These standards is used in Section 4 to determine existing and future capacities.

Minimum Levels of Service

Elementary Schools, grades K-6

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

Middle Schools, grades 7-8

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

High Schools, grades 9-12

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

SECTION 4 -- CAPITAL FACILITIES INVENTORY

The purpose of the facilities inventory is to establish a baseline for determining what facilities will be required to accommodate future demand (student enrollment) at acceptable or established levels of service. This section provides an inventory of capital facilities owned and operated by the District including schools, relocatable classrooms (portables), undeveloped land, developed properties and support facilities. School facility capacity was inventoried based on the space required to accommodate the District's adopted educational program standards for class size and design capacity (see Section 3). A map showing locations of the District's developed educational facilities is provided as Figure 3.

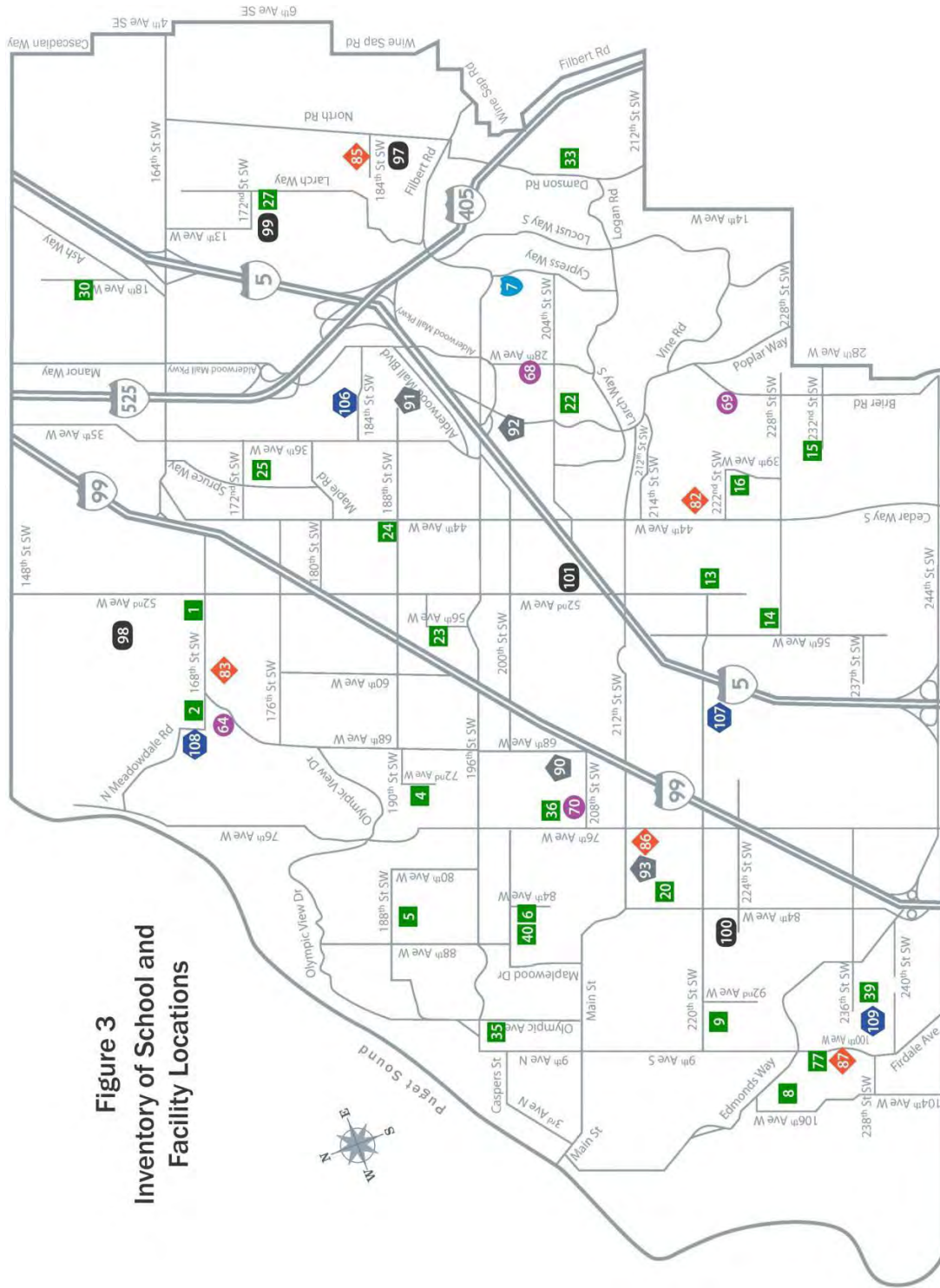
Schools

Edmonds School District currently operates:

- One school serving grade K
- Twenty schools serving grades K-6;
- Two schools serving grades K-8;
- Four schools serving grades 7-8;
- Five schools serving grades 9-12;
- One resource center for K-12 home-schooled students;
- One e-learning program;
- One former middle school as reserve facilities for schools being displaced due to construction or remodeling.









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

Figure 3 - Inventory of School & Facility Locations



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

Edmonds School District

	District Support Sites		Elementary Schools		Middle Schools
	90 - ESC - Educational Services Center		1 - Beverly Elementary		64 - Meadowdale Middle
	92 - Warehouse		2 - Meadowdale Elementary		69 - Brier Terrace Middle
	93 - Stadium		4 - Lynndale Elementary		70 - College Place Middle
	101 - New Transportation Maintenance		5 - Seaview Elementary		99 - Alderwood Middle
			6 - Maplewood Center (K-12)		High Schools
	Undeveloped Parcels		8 - Sherwood Elementary		82 - Mountlake Terrace High
	97 - Site 28		9 - Westgate Elementary		83 - Meadowdale High
	98 - Site 32		13 - Mountlake Terrace Elementary		85 - Lynnwood High
	100 - Chase Lake Bog		14 - Terrace Park School		86 - Edmonds-Woodway High
	Developed Parcels		15 - Brier Elementary		87 - Scriber Lake High
	68 - Alderwood Middle		16 - Cedar Way Elementary		Early Childhood
	106 - Former Lynnwood High School (leased)		20 - Chase Lake Community School		7 - Alderwood Early Childhood Center
	108 - Meadowdale Playfields		22 - Hazelwood Elementary		
	109 - Former Woodway 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		
				Recently Sold	
				91 - Transportation/Maintenance, sold 2021	
				95 - Esperance, sold 2015	
				96 - Site 29, sold 2017	
				105 - Civic Field, sold 2016	
				107 - Former Melody Hill Elementary, sold 2017	
				110 - Former Evergreen Elementary, sold 2016	
				111 - Former ESC, Educational Services Center, sold 2015	

Program Improvements and Population Growth

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

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

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

A more accurate descriptor, the teaching station, has been recognized at the secondary school level for more than a decade. How and where teaching stations are created is program dependent. Many such educational programs are funded through grants and other financial instruments such as agreements with the Gates Foundation, Title 2A and local grants. This is reflected in Table 6 - *High School Capacity Inventory* where the District.

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

Review of Capacity

The OSPI calculates school capacity by dividing gross square footage of a building by a standard square footage per student (e.g., 90 square feet per elementary student, 117 square feet per middle school student, and 130 square feet per high school student)³. This method is used by the State as a simple and uniform approach to determining school capacity for purposes of allocating available State Match Funds to school districts for new school construction. However, this method is not considered to be an accurate reflection of the actual capacity required to accommodate the adopted educational program of Edmonds School District.

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

³WAC 392-343-035 Space Allocation

Table 4 — Elementary School Capacity Inventory

Elementary School	Site Size Acres	Bldg. Area (Sq. Ft.)	Year Built or Last Remodel	Total Class Rooms	Max Student Capacity	90% Program Capacity	Future Capacity Improvements ***	Meets Facility Service Standard
Alderwood	8.9	36,869	1965	20	n/a*	n/a*		
Beverly	9.1	48,020	1988	29	575	518	TBD	
Brier	10.0	43,919	1989	25	456	410		
Cedar Valley	22.1	64,729	2001	25	449	404		*
Cedar Way	9.4	53,819	1993	26	488	439		
Chase Lake	10.3	57,697	2000	25	451	406		*
College Place	9.0	48,180	1968	27	504	454		
Edmonds	8.4	34,726	1966	20	358	322		
Hazelwood	10.3	51,453	1987	28	519	467		
Hilltop	9.8	49,723	1967	29	562	506		
Lynndale	10.0	69,045	2016	26	582	524		*
Lynnwood	8.9	81,405	2018	27	618	556		*
Madrona K-8	26.9	78,930	2018	28	485	437		*
Maplewood K-8	7.4	76,554	2002	27	375	338		*
Martha Lake	10.0	50,753	1993	26	462	416		
Meadowdale	9.1	57,111	2000	25	455	410		*
Mountlake Terrace	8.0	67,379	2018	21	486	437		*
Oak Heights	9.4	49,355	1966	30	528	475	TBD	
Seaview	8.3	49,420	1997	22	396	356		
Sherwood	13.6	43,284	1966	24	526	473		
Spruce	8.9	71,742	1966	28	642	578	184	
Terrace Park	15.3	71,664	2002	33	678	610		*
Westgate	8.1	44,237	1989	25	480	432		
Woodway	13.1	37,291	1962	20	n/a**	n/a**		
New Elementary							550	
Totals	264.3	1,337,305		616	11,075	9,968		
Source: Facilities Operations Department, Edmonds School District, OSPI * Alderwood Early Childhood Center serves Pre-K developmentally challenged children and is not included In total program capacity calculations for K-12 purposes ** Woodway is a reserve campus. *** Future improvements are as currently planned by District. Funding only available for Oak Heights and Spruce (See Discussion of Six Year Plan and Table 12).								

Table 5 — Middle School Capacity Inventory

Middle School	Site Size (Acres)	Building Area (Sq. Ft.)	Year Built or Last Remodel	Teaching Stations	Max Student Capacity (3)	Program Capacity 83%	Future Capacity Improvements (4)	Meets Facility Service Standard
Alderwood		114,400	2016	38	800	664		*
Brier Terrace	22.7	89,258	1969	38	785	652		
College Place	18.7	87,031	1970	40	765	635	75	
Meadowdale	20.7	102,925	2011	35	750	622		*
Madrona – 7 & 8 (1)					150	125		
Maplewood – 7 & 8 (2)					120	100		
New							900	
Totals	81	393,614		151	3,370	2,798		
Source: Facilities Operations Department, Edmonds School District Notes: (1) Madrona K-8: Grades 7 and 8 (2) Maplewood K-8: Grades 7 and 8 (3) Maximum Capacity equals 90% utilization of total seats. (4) Future improvements are as currently planned by District. Funding is not currently available (See Discussion of Six Year Plan and Table 12.								

Table 6 — High School Capacity Inventory

High School	Site Size (acres)	Building Area (Sq. Ft.)	Year Built or Last Remodel	Teaching Stations	Maximum Student Capacity	Program Capacity 83%	Meets Facility Service Standard
Edmonds-Woodway	28.5	208,912	1998	64*	1,539	1,277	*
Lynnwood	40.5	217,597	2009	64	1,577	1,309	*
Meadowdale	40.0	197,306	1998	59*	1,488	1,235	*
Mountlake Terrace	33.2	211,950	1991	64*	1,541	1,279	
Innovative Learning Center (Proposed)	TBD						
Total s	143.9	835,765		251	6,145	5,100	

Source: Facilities Operations Department, Edmonds School District

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

*Edmonds Heights and Scriber Lake High programs are housed at Woodway Campus. Scriber Lake to be replaced by Innovative Learning Center. Funding is not currently available.

Relocatable Classroom Facilities (Portables)

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

As of September 1, 2022, there are a total of 51 relocatable classrooms to 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 7 — Relocatable Classroom Inventory

School	Single Unit	Double Unit	Available Classroom	Student Capacity
Alderwood Middle	2		2	48
Beverly Elementary	1	2	5	120
Cedar Way Elementary	5		5	120
College Place Elementary		1	2	48
Edmonds-Woodway High	1		1	24
Hazelwood Elementary	1		1	24
Hilltop Elementary	2	1	4	96
Martha Lake	2		2	48
Meadowdale High	2	1	4	96
Oak Heights Elementary	7	1	9	216
Sherwood Elementary	5		5	120
Terrace Park	2		2	48
Westgate Elementary	2	1	4	96
Woodway Elementary	3		3	72
Woodway Campus*	4		2*	48
Totals	39	7	51	1,224

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

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

Table 8 — Inventory of Support Facilities

Facility Name	Building Area (Sq. Ft.)	Site Size (Acres)
Administration Center (ESC)	57,400	5.0
Maintenance/Transportation	65,000	19.6
Warehouse	9,600	3.4
District Stadium	7,068	6.0

Source: Facilities Operations Department, Edmonds School District

Land Inventory

Undeveloped Sites

The District owns three undeveloped parcels varying in size from 7.5 to 9.5 acres. An inventory of the undeveloped parcels (sites) owned by the District is summarized in Table 9.

Table 9 — Inventory of Undeveloped Sites

School District Site Description	Acres	Status	Jurisdiction	Zoning
Chase Lake Bog	7.5	Wetlands South of CLE	Edmonds	Residential R8400
Site 28	9.5	Vacant South of LHS	Sno Co	Residential R9600
Site 32	9.4	Vacant North of BEV	Sno Co	Residential R8400

Developed Sites

Table 10 provides an inventory of District-owned sites that are currently developed or planned for uses other than schools, and under long-term ground leases. Each lease retains a recapture provision that would allow the District to reclaim the property if needed for school capacity needs

Table 10 — Inventory of Developed Sites

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

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 2022 school maximum capacity as shown in Tables 4-6. As described above, the District counts relocatable (portable) classrooms (Table 7) in its facilities planning. The figures in Table 11 do not include those temporary capacity figures.

Table 11 Existing and Future Capacity: 2022-2044						
	2022 Enrollment	Surplus/ Deficit	2027 Projected	Surplus/ Deficit	2044 Enrollment	Surplus/ Deficit
Elementary (K-6)	10,288	-320	10,643	-675	16,242	-6,274
Middle School (7-8)	2,950	152	3,037	-239	4,603	-1,805
High School (9-12)	6,169	-1,069	6,309	-1,209	9,478	-4,378
Total	19,407	-1,541	19,989	-2,123	30,323	-12,457

The District does have schools that are in need of rebuilding or remodeling 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

In February 2020, a proposed Bond program did not receive the required super majority vote for Capital Construction funding to complete Spruce Elementary Phase 2, new middle school, new College Place Middle, new Oak Heights Elementary, new Beverly Elementary, new Innovative Learning Center and multi-site renewal & upgrade projects. The additional capacity that would have been provided by these improvements are shown on Tables 4 and 5.

A 2020 Capital / Tech Levy also passed. That Levy totaled \$96M; \$34.87M was facilities related. And in 2021 another Capital Levy passed totaling \$180M (\$70M for Oak Heights, \$45M for Spruce Phase 2 and \$65M for Renewal and Upgrade projects).

Construction Projects - (Six-Year Plan)

Pending passage of future Construction Bonds and/or Levies, the District could see construction of a number of new sites over the 2022 to 2027 period. The 2020 Enrollment Committee recommended changing grade configurations to relieve overcrowding at the elementary grade level. This approach, if used in the future would require adding significant capacity at both the elementary and middle school grade levels.

The Bond Committee identified \$1.7 Billion in priority facilities needs and recommended a \$600 Million initial construction program. Based on the recommendations of both Committees the District's Board of Directors approved a \$600 Million bond program that would add a new elementary school and a new middle school, replace two existing elementary schools, create an Innovative Learning Center, and upgrade or replace systems at multiple sites.

Table 12 — Construction Projects

Proposed Projects	Estimated Completion Date	Student Capacity Change	Estimated Project Cost
Complete Spruce Phase 2 ²	2022	184	\$45,000,000
New Middle School	TBD	900	TBD
New College Place Middle	TBD	75	TBD
New Elementary School	TBD	550	TBD

New Oak Heights Elementary ¹⁻³	2026	TBD	\$70,000,000
New Beverly Elementary ¹⁻³	TBD	TBD	TBD
New Innovative Learning Center	TBD	TBD	TBD
Renewal & Upgrade Projects (Multi-Site)	2020-2026	0	\$65,000,000

1. New replacement school will have a capacity of 550 students.

2. Relocatable classrooms excluded in calculation of existing capacity.

3. Boundary Adjustment will affect capacity change. Precise numbers to be determined.

Table 13 — Capital Construction Finance Detail

	Budget	Local Funds '21 Levy	State Construction Assistance*	Other Property Revenue
Complete Spruce Phase 2	\$45,000,000	\$45,000,000	TBD	TBD
New Middle School	TBD	Future Bond	Not eligible	
New College Place Middle	TBD	Future Bond	TBD	TBD
New Elementary School	TBD	Future Bond	Not eligible	TBD
New Oak Heights Elementary	\$70,000,000	\$70,000,000	TBD	TBD
New Beverly Elementary	TBD	Future Bond	TBD	TBD
New Innovative Learning Center	TBD	Future Bond	Not eligible	TBD
Renewal & Upgrade Projects (Multi-Site)	\$65,000,000	\$65,000,000	Not eligible	TBD

If eventually approved by voters, completion of these construction projects will allow the District to continue to have sufficient capacity at the elementary, middle, and high school levels to house projected student enrollment through the year 2027 and to update existing classroom and building space to assist in achieving its total local educational program objectives. The District would adjust attendance boundaries to accommodate the new schools and balance enrollment among schools.

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

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

Site Acquisition and Improvements

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

SECTION 7 -- CAPITAL FACILITIES FINANCING PLAN

Funding of school facilities is secured from a number of sources, with the major source being voter-approved bonds. Other sources may include State matching funds, development 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 construction of new schools and other capital improvement projects. A 60% voter approval is required to pass a bond. Bonds are then retired through collection of property taxes. Voters in the District passed a capital construction bond for \$275 million in February 2014.

State Construction Assistance Program (SCAP)

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

State Construction Assistance Program funds can only be generated by school construction projects. Site acquisition and improvements are not eligible to receive SCAP funds from the State. Because availability of State match funds has not kept pace with enrollment growth, increasing construction costs, or actual square footage constructed per student, matching funds from the State may not be received by a school district until two or three years after a school has been constructed. If a project is to stay on schedule, a District may have to commit to construction without any certainty of when State matching funds will be available. In such cases, the District must "front fund" a project. That is, the District must finance the complete project with local funds (the future State's share coming from reserves in the Capital Projects Fund.) When the State share is disbursed (without accounting for escalation), the District's capital projects fund is reimbursed, but without interest earnings or accounting for escalating construction costs.

Sales and Ground Lease of District Surplus Property

School districts are permitted to sell or engage in long-term leases of surplus properties. The proceeds of these activities are deposited in the Capital Facilities Fund and become available to fund capital construction projects.

SECTION 8 -- IMPACT FEES

As with the current 2020 CFP, the District will not seek development impact fees in its updated 2022 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 have the ability to adopt their own approach to school impact fee assessment or to adopt an ordinance requiring compliance with the County's 30.66C criteria; and incorporating the County-approved CFP by reference. Additionally, the State Environmental Policy Act (SEPA) authorizes jurisdictions to require mitigation for impacts directly related to a proposed development. In the previous years, some impacts to schools resulting from new residential development have been mitigated through voluntary agreements negotiated on a case-by-case basis. The State subdivision code also addresses the need to provide appropriate provisions for schools (Chapter 58.17 RCW).

The District may decide to collect impact fees in the future. This decision will be based on information available at the time. Given the dynamic development of additional residential capacity within the District's borders, the District cannot rule out the need for future fees. The District will closely monitor development as it occurs and will actively seek appropriate developer contributions for impacts upon the District on a case-by-case basis as authorized by applicable law.

Appendix A
FLO Analytics Reports

Enrollment and Student Generation Rates

(To be provided in Final Documents)



MEMORANDUM

To: Lydia Sellie
Executive Director of Business and Finance
Edmonds School District

Date: February 11, 2022
Project: F1152.08.002

From: Tyler Vick
Managing Director

Alex Brasch
Project Manager / Population Geographer

Ben Maloney
Demographer

RE: 2022–23 to 2031–32 Enrollment Forecasts Report—Edmonds School District

At the request of the Edmonds School District (District/ESD), FLO Analytics (FLO) has prepared forecasts of future student enrollment (2022–23 to 2031–32) for grades kindergarten (K) through 12. The study was completed through three main tasks: (1) Student Enrollment Assessment, (2) Demographic and Land Use Analyses, and (3) Student Enrollment Forecasting. The resulting forecasts are reported at various levels of geography and from different perspectives of enrollment (see Forecast Perspectives section below). Districtwide enrollment forecasts represent the total number of students living both within and outside the district boundary and attending district schools. These forecasts are provided as a district total and per grade group. More granular residence-based and building/program attendance forecasts have also been prepared, which provide the number of students by individual grade and grade group who are anticipated to reside within and attend each of the District's elementary-, middle-, and high-school attendance areas (AAs) and schools/programs.

STUDENT ENROLLMENT ASSESSMENT

To better understand recent enrollment trends, FLO analyzed historical and current fall membership included within the Monthly Enrollment Reports (P223 Headcount) provided by the District, as well as the ESD October 2021–22 Student Information System (SIS). We evaluated historical grade progression ratios (GPRs), participation in special or nontraditional programs, demographic characteristics of the student body (e.g., residence in single-family [SF] or multifamily [MF] housing), and differences in enrollment based on residence versus building attendance (i.e., transfer rates). All students contained within the Monthly Enrollment Reports (P223 Headcount) and ESD SIS were included in our analyses and enrollment forecasts, except for students attending EdCAP, full-time Running Start, and preschool (PS). This task also included mapping the existing AA configurations (Figure 1) and the distribution of the student body across the district and surrounding area based on student residences (Figure 2).

Figure 3 shows districtwide enrollment per individual grade based upon the Monthly Enrollment Reports (P223 Headcount) provided to FLO by the District. Prior to the 2020–21 school year, enrollment had steadily increased, expanding by 121 students from 2016–17 to 2019–20. Primarily due to the effects of COVID-19, enrollment declined markedly between the 2019–20 and 2020–21 school years, decreasing by 469 students. Grades K–6, 9–10, and 12 all experienced a contraction in enrollment from the prior year. Grades experiencing a decline in 2020–21 averaged 65 fewer

students compared to enrollment in 2019–20. In comparison, grade 7 enrolled 72 additional students in 2020–21; an increase over 2019–20 enrollment that can be directly attributed to a large cohort of grade 3 students in 2016–17. Grade 11 enrollment increased by 91 students in 2020–21, an expansion that can be attributed to a relatively large 2018–19 grade 8 cohort in conjunction with a significantly smaller 2019–20 grade 11 cohort. Districtwide enrollment continued to decline in 2021–22 (88 fewer students) with grades 1–2, 4–7, and 10–11 experiencing a contraction. Grades experiencing a decline averaged 57 fewer students compared to enrollment in 2020–21. However, every grade that experienced a decline in 2021–22 enrollment is associated with a cohort that underwent a contraction in 2020–21 enrollment. Enrollment in grades K, 3, 8–9, and 12 increased by an average of 74 additional students in 2021–22. With the exception of the modest increase in K enrollment, every grade that experienced an expansion in 2021–22 is associated with a cohort that either increased or marginally declined in 2020–21.

Figure 4 tabulates enrollment by grade group and school. From 2016–17 to 2019–20, elementary school (ES; grades K–6) enrollment increased by 140 students, while middle schools (MS; grades 7–8) contributed 55 additional students. Over the same period of time, high school (HS; grades 9–12) enrollment contracted by 88 students. Concerns regarding COVID-19 likely contributed to 2020–21 enrollment declines at ES (596 fewer students) and HS (33 students). MS enrollment increased by 87 students in 2020–21, an expansion partially sustained by the presence of a relatively large grade 7 cohort. Despite the eventual availability of the COVID-19 vaccine, ES (664 fewer students), MS (238 fewer students), and HS (60 fewer students) enrollment continued to decline in 2021–22. The continued decline is at least partially due to parents opting to enroll their children in District-run online programs such as Edmonds eLearning Academy and Edmonds K-8 Online Academy, two non-AA schools that experienced a considerable enrollment increase in 2021–22. Due to the pandemic, only Cedar Way ES (17), Hilltop ES (5), and Seaview ES (3) realized growth in enrollment over the past five years. At the MS grade group, Briar Terrace MS enrollment increased by 53 students whereas enrollment at Alderwood MS (30 fewer students), College Place MS (63 fewer students), and Meadowdale (56 fewer students) declined since 2016–17. With the exception of Mountlake Terrace HS, enrollment declined at every high school over the last five years.

Based on our analysis of districtwide transfers (Figure 5), a total of 782 students who live outside the district boundary transferred into District schools, representing 3.9 percent of enrollment. Overall, 4,765 students residing within the district boundary transferred to a school or program different from their residence school, which is based on the AA in which they live. This amounts to a districtwide intradistrict transfer rate of 24.9 percent. Transfers occur within all grade groups, but the largest percent of transfers occurs within the K–6 grade group, with an intradistrict transfer rate of 27.9 percent.

As depicted in the residence-attendance matrices (Figures 6 through 8) per grade group, transfer rates also differ per school/program. For instance, transfer-out rates for ES AAs range from 17.0 percent to 42.8 percent. From the perspective of building attendance, ES transfer in-rates range from 3.5 percent to 33.4 percent. Schools with higher transfer-in rates are typically due to a preference in programming and/or location. These transfer rates can help reveal patterns of student choice or quantify district policies. For instance, if a particular school with a high transfer-in rate began to experience overcrowding, the District may reconsider transfer policies or programming in order to alleviate enrollment issues. Transfer-in rates at the MS level range from 5.2 percent (Alderwood MS) to 24.1 percent (Brier Terrace MS) whereas transfer-out rates range from as 16.1 percent (Brier Terrace MS) to 31.4 percent (College Place MS). At the HS level, Transfer-in rates range from 6.6 percent (Meadowdale HS) to 23.0 percent (Edmonds-Woodway HS) while transfer-out rates range from 14.7 (Edmonds-Woodway HS) percent to 24.3 percent (Lynnwood HS).

DEMOGRAPHIC AND LAND USE ANALYSES

In order to incorporate overarching factors that underpin student enrollment, FLO reviewed and analyzed historical, current, and projected demographic characteristics of the region; trends of population change over time; current land use policies; and anticipated residential development. For these efforts, land use data (e.g., construction permits, zoning, comprehensive plans) and demographic information (e.g., births, female population of child-bearing age) are gleaned from a variety of sources, chief of which are the regional, county, and municipal planning departments that manage and track land use in the district. For more details, see the Data Sources section below.

To better understand current land use based on the aforementioned data as well as the potential for change, we conducted interviews with planners from Snohomish County and the municipalities of Brier, Edmonds, Lynnwood, Mountlake Terrace, and Woodway to discuss foreseeable residential growth (or decline) in the district through the 2031–32 forecast horizon. Key development data acquired through these meetings are presented in Figures 9–11. Figure 9 reports the estimated number of housing units by single-family and multifamily categories per the next two five-year periods, based on available data provided by local, county, or regional data sources. Figure 10 depicts the locations of SF and MF developments that are currently in construction or are expected to be built by 2031. Figure 11 includes details of acquired residential development data, such as data source, housing unit type, anticipated number of units per time period, and assorted notes.

Housing development within the district continues to remain steady, despite the short-lived delay of construction activities due to COVID-19 during the months of March and April 2020. Although the majority of housing is SF, based on anticipated residential development data, the proportion of MF housing is expected to continue increase over the forecast range due to efforts by Snohomish County and the municipalities to encourage increased density through up-zoning (i.e., increasing the number of units allowed per acre). All municipalities and the unincorporated areas of Snohomish County within the district are expected to experience residential development during the forecast horizon, albeit with differences in housing composition and number of units as detailed below.

Certified April 1, 2021 population estimates prepared by the Washington Office of Financial Management (OFM) report that the City of Lynnwood population to be 38,650, an increase of 7.8 percent over the 2011 population estimate (35,860). Lynnwood planners continue to indicate that a significant amount of planned development will consist of MF and mixed-use development planned, particularly on the east side of the city along the I-5 corridor. This high-growth area is predominantly fueled by the expected completion of Sound Transit's Lynnwood light-rail extension in 2024. There are two distinct clusters of MF development. The first is located near the Alderwood Mall and is comprised of the (1) Alderwood Avalon on the Old Sears Site, (2) Lynnwood Place II Buildings 1-4, and (3) Alderwood South & Alexan Alderwood Projects (located at the former Edmonds SD Bus Barn). The second is located south of 196th St SW, west of 48th Ave W, and east of I-5 and is comprised of (1) Northline Village, (2) Kinect@Lynnwood, and (3) Lynnwood 40th. In sum, these developments are expected to account for approximately 1,900 units (based on current plans) through the 2031 forecast horizon. While the majority are expected to be studio and single bedroom units, some will be two plus bedrooms and available for families. As new MF construction is developing on the east side of the city, the Whispering Pines affordable MF housing development (242 units) is expected to have been decommissioned at the time of this writing due to fire code violations. Unfortunately, replacement affordable housing is virtually non-existent, and families of affected students will likely have limited options for relocation within the city. SF development is less pronounced. A low number of SF units, scattered across the city, are expected throughout the ten-year period. Two subdivisions represent concentrations of SF development: Estates at Pinebrook (40 units) and Alexander 61 (16 units). The Lynnwood planners noted that ADU development is allowed but active construction is almost non-

existent as construction costs remain high. Similarly, the housing in the area is generally affordable, but prices have recently increased and will likely continue to do so over the short-term.

Mountlake Terrace continues to be a concentration of residential development with a focus on SF construction. Within the town center area east of I-5 near the transit center, there is a significant amount of housing planned for the ten-year period. Based on currently known data, planned MF development is limited to the nearly completed Terrace Station (100 units remaining). As of October 2019, recoding of the town center allows for specific areas to include 2-4, 4-8, or 8-12 story developments. SF residential development is also materializing throughout the city, with fourteen projects totaling approximately 252 units—the largest include the Creekside Meadows (56 units), Cedar Park Townhomes (52 units), and Willow Glenn Townhomes (40 units).

The City of Edmonds continues to be attractive to working families due its amenities and walkability, leading to a 10 percent increase in population over the last ten years. Most families continue to move into the south portion of the city, from Woodway to Lake Ballinger, and north to 212th Street SW. SF housing turnover is also occurring in and around the historic downtown, but this is less pronounced due to the higher housing costs. Approximately 132 SF permits are currently in the planning process (i.e., issued or finalized). These permits are scattered throughout the city on vacant or partially vacant parcels zoned for residential use, and a similar amount is expected every few years during the forecast horizon. The most residential development is slated to occur in the southeast portion of Edmonds along Highway 99, the majority of which will be MF and mixed-use, totaling approximately 600 units in the 2021–2031 period. While the majority are expected to be studio and single bedroom units, some will be two plus bedrooms and available for families. Notable planned development includes new MF construction at 23601 Highway 99 (251 units) which is slated to reach completion before the 2026–27 school year. Other notable MF development includes 192 units (unnamed) at 23326 Highway 99, and Compass Edmonds Community Phase II and III (60 and 24 units respectively). Edmonds planners note that higher home pricing near Puget Sound may be driving out families with school-age children. It is worth monitoring the relationship between housing prices and enrollment trends throughout the area.

Population growth within unincorporated Snohomish County continues to outpace incorporated areas with an increase of 22 percent since 2011 (304,435 to 371,300). The northern and eastern portions of the district that are comprised of unincorporated Snohomish County are expected to continue to experience a considerable amount residential development in the ten-year period. In total, roughly 950 SF units and 807 MF units are anticipated between 2021 and 2031. As noted last year, an all-time low number of permits were issued in April 2020 but construction soon resumed, and by October 2020, the number of permits were equal to the number of permits issued by that same month in 2019. Similarly, the first half of 2021 started on an accelerated trend then dipped around June, and permitting levels are back to where they were earlier in the year. While seven MF developments have been completed recently, three notable projects remain; Ravenswood (295 units), Ashway at Peasant Creek (259 units), and an unnamed development at 15331 Highway 99 (253 units). While known MF development appears to be slowing, SF development remains active. Notable SF development includes 88 units near 17622 Clover Rd, 78 units at 19909 Cypress Way, and 72 units at 6716 Fisher Rd.

Brier and Woodway continue to expect to see a comparatively low-level of scattered SF developments. The City of Brier is zoned almost entirely SF and little vacant land exists for further substantial development. Moreover, there are no plans to up-zone (i.e., allow more density per acre) or pursue expansion of the Urban Growth Area (UGA) in the near future. Outside of a few smaller SF construction projects (10 and 13 units), Brier planners generally anticipate one to two new SF units per year on remaining vacant lots, as well as a few lot divisions that may result in one to five SF units annually,

resulting in approximately two to seven units annually throughout the ten-year period. Similarly, there are very few vacant lots available for residential development in the City of Woodway. Planners anticipate only five to ten new SF units in the next ten years; however, this could increase to approximately 40 SF units if a pending subdivision of 30 SF units makes it through environmental review.

Based on overarching population and housing trends, as well as current and projected rates of development, we estimate the number of housing units by type that may be constructed within the 2021 to 2026 and 2026 to 2031 periods (Figure 9). Within the first five-year period, we anticipate residential development amounting to 3,685 units, followed by 3,396 units in the second five-year period. These estimates are the result of the rate of development witnessed over the past five years, forecasted population growth within the district, and sentiment conveyed by planners from the municipalities of Brier, Edmonds, Lynnwood, Mountlake Terrace, Woodway and Snohomish County. Although SF housing will continue to be the largest contributor to student yields, we expect the majority of new housing development to be MF.

Housing type is an important indicator of the number of students who can be expected to be yielded from a housing unit. For instance, on average, SF housing units generate more students per unit than MF housing units. Factors that contribute to student generation rates (or yields) include the size of housing units, the number of bedrooms, housing costs, and neighborhood demographics. We assessed residential housing units throughout the district and determined that, of students enrolled in district schools in 2021–22, 73.2 percent reside in SF housing units, 24.5 percent in MF housing units, and 2.3 percent either living outside the area of analysis (Snohomish County) or in unspecified housing units that we were unable to classify as SF or MF.

FLO defines SF and MF housing in accordance with the U.S. Census American Community Survey (ACS) Subject Definitions and other sources of demographic research and population forecasts (e.g., Portland State University Population Research Center). SF housing includes one-unit structures that are fully detached from other housing, as well as attached dwellings (e.g., row houses and townhouses). In the case of attached units, in order to be classified as a SF structure each must be separated from the adjacent unit by a ground-to-roof wall, and units must not share heating/air-conditioning systems or utilities. MF housing is defined as residential buildings containing two or more housing units that do not have a ground-to-roof wall and/or have common facilities (attic, basement, heating, plumbing, etc.). Average student generation rates vary by geographic location in the district and by housing subtypes (e.g., SF detached, townhome, duplex, multiunit apartments). We determine student generation rates for district subregions, typically U.S. Census block groups, which contribute to districtwide averages per SF and MF housing unit types. Based on currently available residential housing data, average student generation rates in the district were estimated to be 0.39 students per SF housing unit and 0.18 students per MF housing unit (Figure 12).

The number of students enrolled in a district is largely influenced by the number of school-aged children residing within the district boundary. We compare historical birth data (i.e., live births within the county) from the Washington State Department of Health (DOH) to historical K class sizes to determine annual “K percent of births” values (i.e., the number of kindergarteners who enroll with the District divided by the number of live births within the county five years prior). These values, in combination with age-group-specific population projections of childbearing-aged women residing in the county, allow us to forecast the number of anticipated births in the county, and thus the number of kindergarteners anticipated in future school years. Figure 13 depicts the number of live births within the county, K class sizes that include all enrolled students, and resulting ratios of kindergarteners to births, including both historical values and our forecasts. Similar to surrounding counties, births within the county steadily increased from 2012 (9,206) to 2016 (10,014). Since then, County births have

steadily declined every year through 2019 (9,638 births). Snohomish County 2020 birth data is unavailable at the time of this writing which necessitated the creation of a 2020 birth forecast (391 fewer births) by FLO. K enrollment increased from 1,532 students in 2017 to 1,608 students in 2019 then declined precipitously in 2020 (1,452 students) in response to the effects of COVID-19 before increasing (1,520 students) in 2021. K enrollment forecasts are further discussed in the Births to Kindergarten section.

The progression of students from one grade to the next is a significant determinant of future enrollment, and therefore plays a significant role in our forecasting process. We assess how cohort sizes change over time by calculating GPRs—the ratio of enrollment in a specific grade in a given year to the enrollment of the same age cohort in the previous year. For instance, when 150 kindergarteners in 2017 become 140 1st graders in 2018, the GPR is 0.93. GPRs quantify how cohort sizes change as students' progress to subsequent grades by considering that not all students advance to the next grade and that new students join existing cohorts. A GPR value greater than 1 indicates that the student cohort increased in size from one grade to the next. Such a result may be due to students moving into the district or students choosing to transfer into the district from other districts (public or private). Conversely, a GPR value less than 1 indicates that the student cohort decreased in size from one grade to the next. This may be due to students moving out of the district, students choosing to transfer to other districts, or students not advancing to the next grade.

Figure 14 depicts the GPRs for all students enrolled in the District from 2017–18 to 2021–22. The two- and three-year GPR averages shown incorporate the 2020–21 and 2021–22 GPRs and were not used in the forecasting process. In order to mitigate the irregular effect of COVID-19 on the grade transitions from 2019–20 to 2020–21 and 2020–21 to 2021–22, a set of forecasted GPRs was developed. These are also included in Figure 14. From 2017–18 to 2019–20, nearly every GPR was near or above 1.00 for all grade transitions, with the exception of the grade 10–11 transition, which is primarily caused by the availability of Running Start and other alternative programs. The contraction in enrollment due to COVID-19 is the likely reason that nearly every GPR decreased in 2020–21. The largest contractions were within the K–6 grade group where the largest enrollment contractions were experienced. While overall enrollment declined slightly in 2021–22 (88 fewer students), a few cohorts added enrollment as students began to return to the District, leading to a higher average districtwide GPR in 2021–22 (0.99) than in 2020–21 (0.98). As further discussed in the COVID-19 Assumptions section, the forecasted GPRs for the preferred medium-growth scenario assume a return to the pre-pandemic levels as a starting basis and were then further adjusted slightly to account for an expected increase in enrollment compared to recent years in response to a higher anticipated rate of in-migration due to new housing.

ENROLLMENT FORECASTS

Summary

- Between the 2021–22 and 2031–32 school years, districtwide enrollment (headcount) is forecasted to increase from 19,905 to 20,641, or by 3.7 percent. Figure 15 shows the annual districtwide building attendance forecasts for the low-, medium- (preferred), and high-growth scenarios. Figures 16 through 24 use the medium-growth scenario to represent future enrollment, as it represents the most likely enrollment outcomes based on currently available data and our analysis. The COVID-19 Assumptions section discusses relevant assumptions for this year's low-, medium- (preferred), and high-growth scenarios.

- Figure 16 disaggregates the districtwide building attendance forecasts by grade group.
 - K–5 enrollment from 10,484 to 11,152 (6.4 percent increase)
 - 6–8 enrollment from 3,105 to 3,177 (2.3 percent increase)
 - 9–12 enrollment from 6,316 to 6,312 (0.0 percent decrease)
- In comparison to the previous two figures, Figure 17 provides annual districtwide residence-based forecasts per individual grade. These forecasts represent the number of students expected to reside in the district (for more details, see the Forecast Perspectives section below). The individual grade forecasts are summed to form grade group totals and adding the students who reside outside the district produces annual building attendance forecasts per grade group. Relatively larger HS cohorts matriculating out of the system, while being replaced by smaller cohorts entering the grade group, will act to keep districtwide enrollment relatively flat through 2026–27 (60 additional students). However, smaller cohorts exiting the District in conjunction with the expectation of larger K cohorts, will act to amplify enrollment gains between 2026–27 and 2031–32 (676 additional students).
- Based on the geographic distribution of students, the residence-based forecasts are aggregated to grade group AAs. Figures 18 through 20 provides annual forecasts of students residing in each of the ES, MS, and HS AAs, respectively.
- Building/program attendance forecasts are derived from the residence-based forecasts, using an analysis of the rates of intradistrict transfer for specific grades (e.g., Figures 5–8), rates of out-of-district student enrollment, and district policies concerning transfers and student placement. Figure 21 provides annual districtwide building attendance forecasts per individual grade (for the preferred, or medium-growth, scenario). Figures 22 through 24 provides annual forecasts by individual grade of students attending each of the ES, MS, and HS buildings/programs, respectively.
- Figures 25 and 26 provide annual districtwide building attendance forecasts per individual grade for the high- and low-growth scenarios, respectively. The COVID-19 Assumptions section of this report discusses assumptions for the low-, medium- (preferred), and high-growth scenarios.

DETAILED RESULTS

Births to Kindergarten

As previously mentioned, the relationship between the number of births occurring in the district and future K class sizes is vitally important to forecasting student enrollment. An increasing number of births will typically correlate to increases in enrollment and vice versa. Figure 13 shows the relationship between K enrollment and related births five years prior. County births gradually increased from 2012 to 2016 (9,206 to 10,014). In response, K enrollment steadily increased from 2017 (1,532) to 2019 (1,608). While 2015 experienced 244 more births than in 2014, 2020–21 K enrollment saw 156 fewer K students than in 2019–20, a contraction that is mainly due to concerns regarding COVID-19. Although K enrollment recovered modestly in 2021 (68 additional students), the K percent of Births metric increased only slightly (14.9 percent to 15.2 percent) as 2016 births represented a marked increase over 2015 (275 additional births). County births regressed in 2017 (173 fewer births than in 2016), 2018 (9,728 births), and in 2019 (9,638). However, we are anticipating a gradual return to pre-pandemic K percent of births, leading to the expectation that K enrollment will gradually increase between 2021–22 (1,520) and 2024–25 (1,560). Births are expected to continue to decline in 2020 (Washington 2020 birth data is unavailable as of the time of this writing), leading to a contraction in

K enrollment in 2025–26 (33 fewer K students). As a result of the economic uncertainty surrounding COVID-19 and the overall downward regression in births since 2016, we expect births to moderately decline in 2021. However, 2026–27 K enrollment is forecasted to remain flat (1,528 students) instead of decline due to the expectation that the K percent of births will continue to increase to pre-pandemic levels. With indications that the impacts surrounding COVID-19 may continue to gradually alleviate, along with an expanding population of women of child-bearing age, we anticipate that births will return to levels on par with 2020 (9,247 forecasted births) in 2022 (9,214 forecasted births) before steadily increasing through 2026 (by an average of 80 additional births per year). This will lead to a steady expansion in K enrollment between 2027–28 and 2031–32.

Districtwide Enrollment Forecasts

As noted in Figures 15, 16, and 21, districtwide enrollment is forecasted to increase from 19,905 in 2021–22 to 20,641 in 2031–32. While there is some year-to-year variation in forecasted enrollment, we do expect a slight enrollment increase (60 additional students) over the first half of the forecast period (2021–22 to 2026–27) followed by a more rapid increase between 2026–27 and 2031–32 (676 additional students). This difference is mainly due to the presence of smaller cohorts in the upper grades counteracting the enrollment gains expected in the lower grades. As these smaller cohorts exit the system, enrollment is expected to increase more rapidly through the second half of the forecast period.

This growth is due in part to the expectation that the population of the Cities of Lynnwood, Mountlake Terrace, Edmonds, Brier, Woodway and the surrounding unincorporated area will continue to expand at recent rates for the foreseeable future. The other key underlying factor is that as the population of the area increases, the population of women of childbearing age is expected to expand as well. While age-specific fertility rates may not rebound to a significant degree, preceded by the expectation of a more pronounced decline in 2020 and 2021, the presence of an increasing population of women of childbearing age will act to offset a generally tepid fertility rate to some degree and is expected lead to a gradual increase in births through 2026 and, ultimately, the aforementioned K enrollment expansion.

Over the second half of the forecast period, we expect building attendance to grow at a more accelerated pace, from 19,965 in 2026–27 to 20,641 in 2031–32. The accelerated growth is primarily attributed to our projection that County births will steadily expand after an expected lull in births in 2020 and 2021 along with the expectation that smaller cohorts currently enrolled in the District will continue to filter out of the system. Additionally, as noted in the Demographic and Land Use Analyses section (and Figure 9), we expect the housing market to only modestly slow between 2026 and 2031 (3,396 units) when compared to period between 2021 and 2026 (3,685 units). The expectation of a more robust K enrollment in 2023–24 and 2024–25 (and after 2026–27), along with forecast GPRs representing a steady increase in cohort size, is expected to counteract any slowing in construction activity and smaller forecasted K classes (2025–26 and 2026–27).

From a grade group perspective, most enrollment gains over the forecast period will be realized in the ES grades (Figure 16). Much of this gain can be attributed to the expectation of a series of more robust K classes entering the District in 2023–24 and 2024–25 along with a steady increase in K enrollment after the potential lull in 2025–26 and 2026–27. A steady expansion of ES grade group enrollment is expected to lead to a fairly even rate of development between the first and second half of the forecast period. Enrollment is anticipated to increase by 317 additional students between 2021–22 and 2026–27 followed by 351 additional students between 2026–27 and 2031–32.

Enrollment as the MS level is expected to slightly decrease through 2026–27 (32 fewer students), before enrolling 104 additional students over the second half of the forecast (Figure 16). MS enrollment is anticipated to decline between 2022–23 and 2024–25 (204 fewer students) then increase by 125 students in 2025–26 in response to a comparatively large grade 7 cohort entering

the grade group as a significantly smaller cohort leaves to enter the HS grade group. With the exception of the 2027–28 school year (76 fewer students – in response to a small grade 7 cohort), MS enrollment is expected to continuously expand through 2031–32, leading to 3,177 students by the end of the forecast period.

The HS grade group is expected to enroll nearly the same number of students in 2031–32 as in 2021–22, albeit with fluctuations throughout the forecast period (Figure 16). HS enrollment will remain generally flat through 2024–25 then decline by 107 students in 2025–26 and 123 students in 2026–27 as relatively larger cohorts matriculate and exit the system. However, HS enrollment is expected to steadily increase thereafter as larger cohorts begin to enter and move through the grade group. HS grade group enrollment is anticipated to increase an average of 44 students per year between 2026–27 and 2031–32, leading to the expectation of an increase of 221 students over the second half of the forecast period that will offset the enrollment losses expected over the first half of the forecast.

METHODS

Demographic Terms

While both projections and forecasts represent future enrollment, the methods of prediction differ. Enrollment projections are based on past and current patterns of change and the expectation that these trends will continue. For example, historical enrollment data for an ES shows an increase from 250 students in 2017, to 265 students in 2018, and to 275 students in 2019. The average rate of change observed over the past three years could be used to prepare a projection of enrollment in 2020, if the trend of growth is expected to continue without change or deviation. In other words, a projection does not predict future trends or what will occur, but rather indicates what would happen if the past and current trends that underpin the projection continue. In this sense, projections are strictly mathematical.

In comparison, forecasts are based on past and current patterns of change, but also incorporate predictions of how trends may change in the future. So that practitioners may evaluate a range of potential outcomes, it is common for multiple sets of projections to be prepared, which capture a range of scenarios, such as decreasing enrollment due to declining fertility rates or rapid enrollment growth due to residential development and in-migration. Sets of projections differ based on the modification of one or more variables, including birth rates, student generation/yield rates per housing type, and rates of residential housing development. Forecasts represent the set of projections that is deemed most likely to materialize, based on the analysis and decision-making of practitioners. In this sense, forecasts represent the art of the science of demography.

Forecast Perspectives

There are two basic types of student enrollment forecasts:

1. Building/program attendance forecasts represent the number of students expected to attend a specific school building or program. Districts often refer to these values as “actual” enrollments or the number of “students in desks”. Building/program attendance forecasts account for out-of-district students, intradistrict transfers, special programs, etc.
2. Residence forecasts represent the number of students expected to reside in a certain region, whether it be the district as a whole or individual AAs. Residence forecasts are generally more accurate than building/program attendance forecasts because the former are not subject to the variability of student choice, school district policies, movement of program locations, and constraints on inter- and intradistrict transfers imposed by building capacities.

Residence forecasts are rooted in student location and, therefore, with the proper granularity, can be allocated to boundaries other than the current AAs. For instance, our residence forecasts are produced at the granular geographic level of U.S. Census block group, of which there are 131 in the district. These small-area forecasts can be accurately aggregated to larger geographies, such as prospective AA boundaries. Despite these advantages, residence forecasts do not always suit district needs.

Building/program attendance forecasts are often more useful, albeit less reliable, because they reflect realized enrollment by capturing the inter- and intradistrict transfers. At the districtwide level, the building/program attendance forecasts are always higher than the forecast of students residing in the AAs. This is due to the segment of students who live outside the district boundary but attend district schools. When comparing building/program attendance and residence-based forecasts for an individual school, it is important to recognize that there will be some variation between each.

Forecasting Methodologies

Initial Steps

Our first step in preparing enrollment forecasts is to perform a detailed assessment of historical enrollment trends (i.e., 2016–17 to 2021–22), as well as the geographic distribution of the 2021–22 student body. The results of this enrollment assessment feed into our enrollment forecasts, which use a combination of the demographic cohort-component model and the enrollment rate method. In the former, the components of population change (i.e., births, deaths, and migration) are used to forecast population for the district by age and sex, while the latter advances each age cohort through successive grade levels.

Enrollment Rate Method

In terms of linking historical enrollment trends to future enrollment forecasts, the enrollment rate method is first used to assess the percentage of five-year-olds living within the district boundary in the 2021–22 school year who were enrolled in K at district schools. This is referred to as the K enrollment (or “capture”) rate. Separate enrollment rates are similarly computed for each of the other age/grade cohorts present in 2021–22 (i.e., 1st through 12th grades). These cohort-specific enrollment rates—modified based on certain assumptions (e.g., dropout rates in HS)—are the primary basis for determining the rate at which each given cohort will be enrolled in the future and can be thought of as a means of calibrating the future enrollment forecasts. For example, the 2021–22 3rd-grade enrollment rate of eight-year-olds heavily informs the 8th-grade capture rate of the projected district population of 13-year-olds in 2026–27.

This is a widely prescribed forecasting method and is especially useful in one-year forecasts and districts without much year-to-year cohort variability. With minor refinements, our forecasts apply the average of the K–5 capture rates for the 2021–22 cohorts to new cohorts matriculating into K in the 2022–23 school year and later.

Projecting Net Migration

Another way historical enrollment data is used is by leveraging knowledge of the geographic distribution of the 2021–22 student population in order to calculate enrollment rates at the subdistrict level. To do this, FLO divided the district into regions, each with a sufficient number of students at each grade level to permit statistical calculations. These subdistrict, cohort-specific enrollment rates were applied as a baseline to new district school-age children projected to be added because of net in-migration over the next five years. Note that the future migration rate and population projections used, which were largely informed by Esri’s 2021/2026 U.S. Demographics, were prepared at an even finer

geographic resolution (U.S. Census block groups) and at units that are generally socioeconomically distinct from each other.

The Esri 2021/2026 U.S. Demographics dataset is prepared using recent growth trends derived from U.S. Census and state/local sources and, in tracking growth, accounts for regional land use and comprehensive plans, publicly available development data (e.g., permits), housing inventory, and U.S. Postal Service carrier route additions. Prior to use, FLO reviews these data and confirms proper assumptions and incorporation of local data sources, particularly with respect to any publicly available residential development data, making modifications as warranted.

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

At the end of each five-year period, the attendance-area numbers are modified as needed to ensure that they are consistent with districtwide numbers, which are computed using only districtwide population and historical enrollment numbers. In this way, the districtwide numbers “control” the attendance-area-level numbers.

Longer-term Forecasts (Ten-Year)

Our ten-year forecasts assume that recent trends in migration patterns, similar to those between 2021–22 and 2026–27, hold steady through the forecast period. Similar assumptions are estimated for the buildable land inventory and their build-out rates within the district boundaries.

2020 to 2026 births, which inform K classes beginning with the 2025–26 school year, were projected based on a review of historic live births to mothers residing within the district boundary, forecasted population of females of child-bearing age throughout Snohomish County, and state trends in fertility.

In terms of capture rate, the grade-specific rates computed from the 2021–22 student enrollment assessments are used. Also, as with the shorter-term projections, a set of forecast GPRs is enforced at the district level. It is important to note that the forecast GPRs used do not incorporate 2020–21 and 2021–22 data due to the irregular effects of COVID-19.

COVID-19 Assumptions

While the effects of enrollment declines in 2020–21 and, to a lesser degree, 2021–22 have already been experienced by the District, we anticipate additional impacts from COVID-19 may surface over the coming years (i.e., a decline in 2021 births/2026–27 K enrollment). This is addressed through our preparation of two additional forecast scenarios: a high-growth scenario and a low-growth scenario. Where the preferred (medium-growth) scenario assumes a gradual increase in births, a K percent of birth ratio that incrementally increases to pre-pandemic trends by 2026–27, a moderated decline in 2021 births, and is consistent with known housing construction; the high-growth scenario assumes an accelerated pace of housing, additional births, and students that did not enroll in 2020–21 and 2021–22 gradually returning to the District to some degree. The low-growth scenario assumes the opposite of the high-growth scenario (i.e., fewer births, a steeper 2021 birth decline, etc.). The low-growth scenario represents the least likely forecast outcome, but it still remains a possibility, especially if births continue to lag past the forecasted downturn in 2021.

One contributing factor to the overall lack of return of missing 2020–21 students may have been the absence of vaccine availability for school-age children until after October 1st. This might have been a particularly important consideration for parents at the time they were making registration decisions

for the upcoming school year, as the highly contagious delta variant had been dominant in the U.S. since early July and the timeframe for vaccine rollout for children was still unknown. Vaccines were not available for children ages 5–11—representing the majority of the missing 2020–21 student population of 951—until early November.

There simply is not data available to tell us where all these students went, or why. As reported by the National Education Association (<https://www.nea.org/advocating-for-change/new-from-nea/finding-lost-students-pandemic>), national research estimates that as many as 3 million students disappeared between March 1st (just before most districts nationally closed school buildings and switched to remote learning) and October 1st, 2020. While comparable research has not yet been completed regarding October 1st, 2021 enrollment, based on FLO's conversations with other districts of comparable size in the Pacific Northwest, the tepid return, if at all, of 2020–21 missing students thus far is not unique.

Some of the missing students may also have been lost to alternative pathways of education. One such path is homeschooling, with the possibility that in the stress and confusion of the pandemic some parents may not have properly notified ESD of this decision. Another option is online public schools that were established pre-pandemic and may have been more appealing than Edmonds Online Academy (EOA) K-8 that ESD has offered in response to the pandemic. One potential example is the Washington Virtual Academy (WAVA). Private schools represent yet another alternative path that families may have chosen, especially in cases where they may have returned to in-person instruction before public schools in the surrounding area.

Finally, regarding 2021 births, as recently reported by the Brookings Institution (<https://www.brookings.edu/research/early-evidence-of-missing-births-from-the-covid-19-baby-bust/>), complete data for the year are not yet available. This is the case both nationally as well as locally in Oregon and Snohomish County. While January and February 2021 monthly totals nationally were significantly lower than the same months in 2020, the March through June 2021 monthly totals have been higher than in 2020. However, as noted by Brookings, data are not yet available on births that would have been conceived during the 2020/21 winter wave of the COVID-19 pandemic. While we forecasted a drop in district births from the forecasted total of 9,247 in 2020 to 9,069 in 2021 (2 percent decline), we assume little to no impact from COVID-19 on 2022 births and on. It is also more important to consider this in the context of the sustained, substantial decline in general fertility rates in Washington since the Great Recession (2008), which we have. The modest growth in annual births we forecasted is due only to our projection that the growth rate of the population of women of child-bearing age in the district will offset continued declines in fertility rate for the foreseeable future.

Data Sources

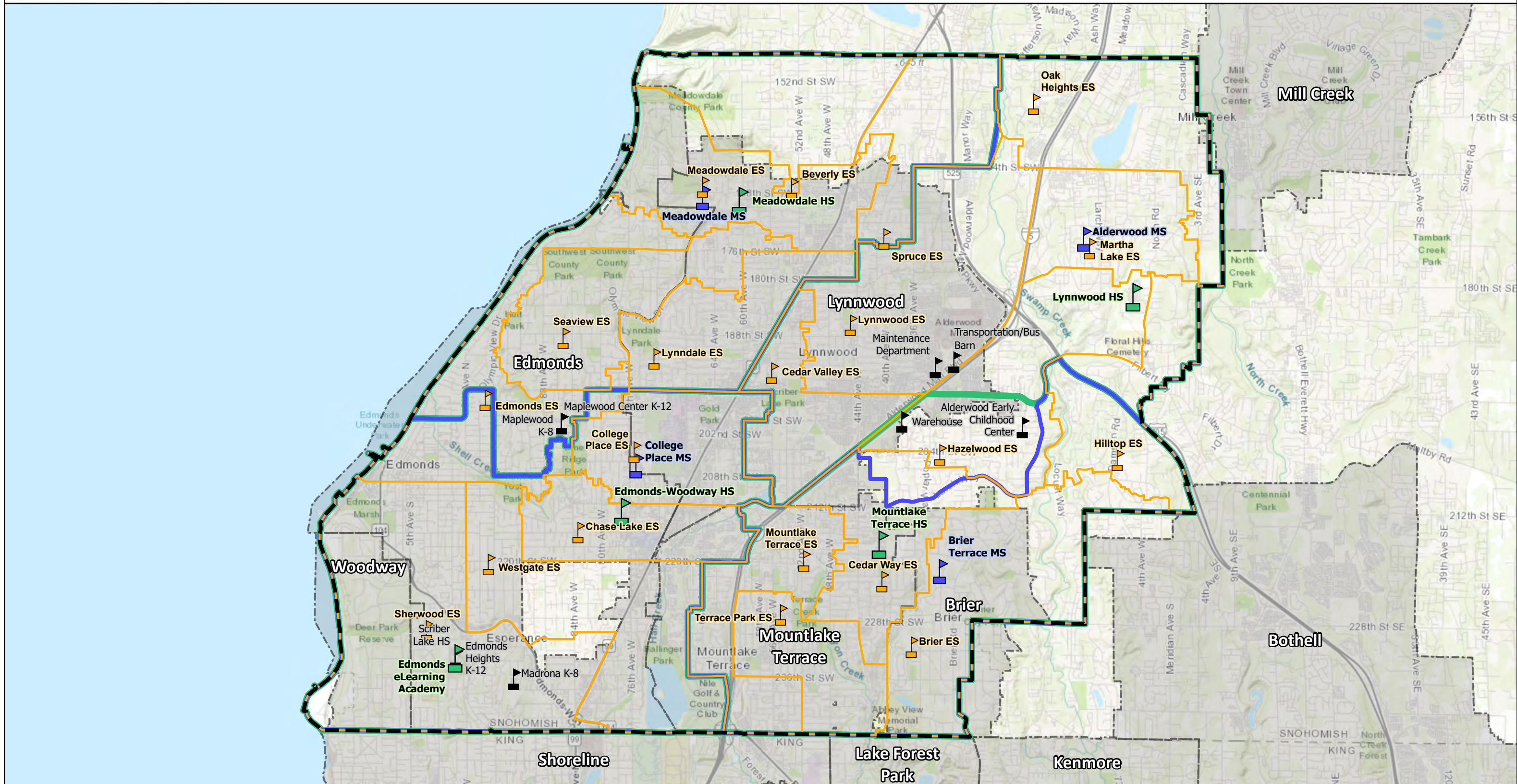
FLO used the following data sources to inform our student enrollment forecasts:

- ESD SIS (October 2021), AAs, district boundary, and school locations
- ESD Monthly Enrollment Report P223 Headcount (2016–2017 to 2021–22)
- Washington State Department of Health (WA DOH) birth data
- Washington State Office of Financial Management forecasts
- U.S. Census and American Community Survey (ACS) enumerations and estimates
- Esri 2021/2026 U.S. Demographics
- FLO-conducted interviews with planners from Snohomish County, Brier, Edmonds, Lynnwood, Mountlake Terrace, and Woodway

- County and/or municipal parcels, zoning, comprehensive plans, specific area plans, and building permits
- 2020 Statewide Urban Growth Areas and 2020 City Limits from Washington State Department of Ecology

Accuracy

Enrollment projections and forecasts are expected values based on assessment of current and past data, and as such, should be considered a planning tool, rather than steadfast numbers for the allocation of future resources. Unlike measurable data, such as the results of a survey, projections and forecasts do not allow for the estimation of a confidence interval to measure accuracy. The best way to measure error is to compare actual enrollment with previously prepared projections or forecasts that were conducted using similar data and methodologies. Finally, when considering confidence and accuracy, the appropriate use of projections and forecasts includes an understanding that there is likely to be some degree of variation from the anticipated values. It is important that stakeholders “monitor and manage” the changing conditions that will affect future populations, and that projections or forecasts be updated either at a regular frequency or when deviation of actual enrollment from the projections or forecasts is significant and/or develops into a sustained trend.



Student Density

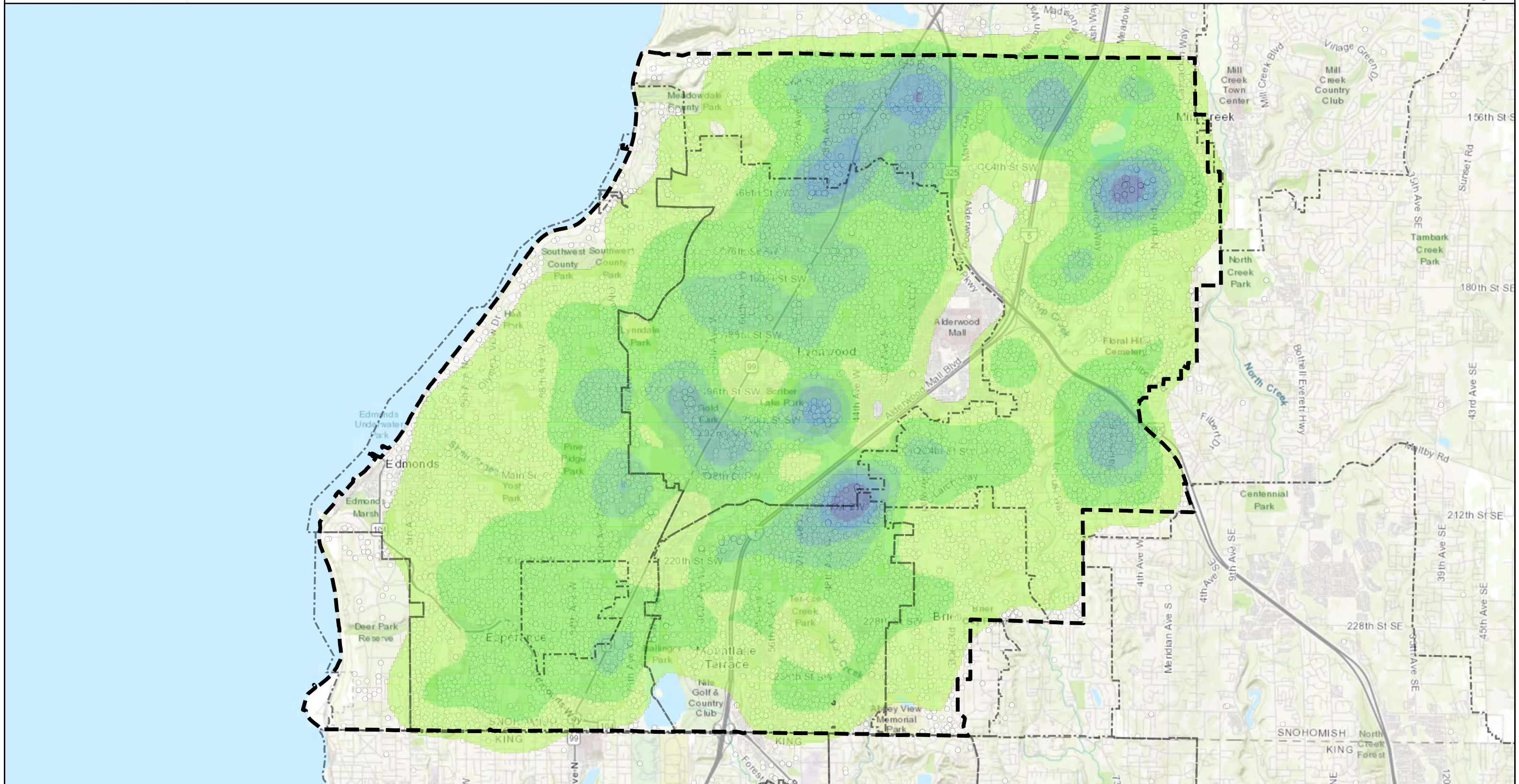
















Figure 2

Figure 3: Historical and Current Enrollment per Grade

District-wide Totals

Grade	2016-17	2017-18	2018-19	2019-20	2020-21	2021-22	2016-17 to 2021-22	
K	1,599	1,532	1,575	1,608	1,452	1,520		-79
1	1,597	1,568	1,557	1,613	1,539	1,478		-119
2	1,558	1,612	1,528	1,569	1,564	1,531		-27
3	1,640	1,555	1,600	1,523	1,515	1,546		-94
4	1,544	1,642	1,547	1,601	1,487	1,476		-68
5	1,506	1,528	1,634	1,572	1,549	1,417		-89
6	1,534	1,526	1,562	1,683	1,542	1,516		-18
7	1,523	1,493	1,516	1,571	1,643	1,498		-25
8	1,521	1,530	1,503	1,536	1,552	1,607		86
9	1,594	1,570	1,599	1,580	1,567	1,599		5
10	1,606	1,624	1,558	1,634	1,566	1,559		-47
11	1,565	1,511	1,543	1,458	1,549	1,507		-58
12	1,554	1,575	1,551	1,514	1,468	1,651		97
District Total	20,341	20,266	20,273	20,462	19,993	19,905		-436

Edmonds School District Monthly Enrollment Report (P223 Headcount) October 2016–17 to 2021–22 enrollment per grade. Enrollment values exclude EdCAP, full-time Running Start, and PS. The lowest and highest enrollment values per grade are highlighted blue and orange, respectively. Sparklines are colored blue, gray, or orange to illustrate 5-year decline, stasis, or growth. Abrupt changes in enrollment are likely due to deliberate student placement or attendance boundary changes.

Figure 4: Historical and Current Enrollment per School and Grade Group

Elementary School (K-6)

School Name	2016-17	2017-18	2018-19	2019-20	2020-21	2021-22	2016-17 to 2021-22
Beverly ES	588	583	567	529	498	432	-156
Brier ES	441	455	441	465	414	404	-37
Cedar Valley ES	470	440	442	469	430	363	-107
Cedar Way ES	486	564	560	584	551	503	17
Chase Lake ES	356	374	409	423	413	350	-6
College Place ES	491	499	514	504	466	447	-44
Edmonds ES	364	334	350	318	280	254	-110
Hazlewood ES	507	488	464	453	422	395	-112
Hilltop ES	517	525	545	556	515	522	5
Lynndale ES	414	438	428	452	405	379	-35
Lynnwood ES	603	525	525	564	547	520	-83
Martha Lake ES	501	468	455	467	442	389	-112
Meadowdale ES	508	533	514	493	491	458	-50
Mountlake Terrace ES	427	402	402	427	422	416	-11
Oak Heights ES	616	626	617	611	594	520	-96
Seaview ES	397	402	438	436	424	400	3
Sherwood ES	484	531	534	552	506	407	-77
Spruce ES	569	543	576	563	494	460	-109
Terrace Park ES	336	315	296	296	289	257	-79
Westgate ES	494	505	538	547	510	409	-85
Woodway Center *	0	0	0	0	0	164	164
ES Total	9,569	9,550	9,615	9,709	9,113	8,449	-1,120

Middle School (7-8)

School Name	2016-17	2017-18	2018-19	2019-20	2020-21	2021-22	2016-17 to 2021-22
Alderwood MS	760	828	816	794	822	730	-30
Brier Terrace MS	628	637	683	680	700	681	53
College Place MS	522	461	433	482	528	459	-63
Meadowdale MS	768	743	734	777	770	712	-56
MS Total	2,678	2,669	2,666	2,733	2,820	2,582	-96

High School (9-12)

School Name	2016-17	2017-18	2018-19	2019-20	2020-21	2021-22	2016-17 to 2021-22
Edmonds-Woodway HS	1,593	1,567	1,546	1,516	1,445	1,502	-91
Lynnwood HS	1,340	1,335	1,377	1,381	1,350	1,313	-27
Meadowdale HS	1,572	1,568	1,495	1,478	1,460	1,445	-127
Mountlake Terrace HS	1,282	1,318	1,289	1,324	1,411	1,346	64
HS Total	5,787	5,788	5,707	5,699	5,666	5,606	-181

Figure 4: Historical and Current Enrollment per School and Grade Group

Non-attendance Area (AA) Schools/Programs

School Name	2016-17	2017-18	2018-19	2019-20	2020-21	2021-22	2016-17 to 2021-22
Challenge ES	336	331	316	324	344	344	8
Edmonds eLearning Academy	83	66	95	120	123	344	261
Edmonds Heights K-12	540	498	532	577	636	536	-4
Edmonds Online Academy †	0	0	0	0	0	814	814
Madrona K-8	629	632	603	607	611	585	-44
Maplewood K-8 Co-Op	450	490	473	488	485	443	-7
Scriber Lake HS	269	242	266	205	195	202	-67
Non-AA Total	2,307	2,259	2,285	2,321	2,394	3,268	961

Totals

School Name	2016-17	2017-18	2018-19	2019-20	2020-21	2021-22	2016-17 to 2021-22
District Total	20,341	20,266	20,273	20,462	19,993	19,905	-436

Edmonds School District Monthly Enrollment Report (P223 Headcount) October 2016–17 to 2021–22 enrollment per school and grade group. Enrollment values exclude EdCAP, full-time Running Start, and PS. The lowest and highest enrollment values per grade are highlighted blue and orange, respectively. Sparklines are colored blue, gray, or orange to illustrate 5-year decline, stasis, or growth. Abrupt changes in enrollment are likely due to deliberate student placement or attendance boundary changes.

* Opened in the 2021–22 school year to service kindergarten students for Sherwood ES and Westgate ES

† Opened in the 2021–22 school year to service students in grades K–8

Figure 5: 2021–2022 District-wide Transfer Rates

Grade Group	Enrollment In-District	Enrollment from Out-of-District	Enrollment Total	Transfers Intra-district	Transfers Total	Transfer Rate Intra-district	Transfer Rate from Out-of-District	Transfer Rate Total
K-6	10,171	313	10,484	2,842	3,155	27.9%	3.0%	30.1%
7-8	2,976	129	3,105	679	808	22.8%	4.2%	26.0%
9-12	5,976	340	6,316	1,244	1,584	20.8%	5.4%	25.1%
District-wide	19,123	782	19,905	4,765	5,547	24.9%	3.9%	27.9%

Edmonds School District October 2021–22 SIS enrollment. Enrollment values omit EdCAP, full-time Running Start, and PS.

Figure 6: 2021–2022 Elementary School Enrollment Patterns
Residence-Attendance Matrix

<div>School of Attendanc</div> <div>Attendance Area</div>	Residence Count	Beverly ES	Brier ES	Cedar Valley ES	Cedar Way ES	Chase Lake ES	College Place ES	Edmonds ES	Hazelwood ES	Hilltop ES	Lynndale ES	Lynnwood ES	Martha Lake ES	Meadowdale ES	Mountlake Terrace ES	Oak Heights ES	Seaview ES	Sherwood ES	Spruce ES	Terrace Park ES	Westgate ES	Challenge ES	Edmonds Heights K-12	Edmonds K-8 Online Academy	Madrona K-8	Maplewood K-8 Co- Op	Woodway Center	Capture Rate	Transfer Out Student Total	Transfer Out Rate
Beverly ES	527	392	1	2	1	4	2	2	0	0	7	3	0	9	2	2	2	2	2	2	1	7	15	39	13	17	0	74.4%	135	25.6%
Brier ES	460	0	363	1	5	1	0	0	2	10	1	1	0	0	4	0	0	0	0	3	0	20	7	12	15	14	1	78.9%	97	21.1%
Cedar Valley ES	408	0	0	307	3	3	2	1	4	2	2	6	0	4	5	1	0	2	0	4	6	6	4	30	7	9	0	75.2%	101	24.8%
Cedar Way ES	656	3	4	4	465	14	1	0	7	6	0	5	3	1	18	1	0	1	3	4	3	28	18	37	15	15	0	70.9%	191	29.1%
Chase Lake ES	321	0	0	0	1	233	4	3	0	0	1	1	0	0	8	1	0	0	1	0	3	6	4	28	17	7	3	72.6%	88	27.4%
College Place ES	567	1	2	12	4	22	417	7	2	1	5	1	2	3	5	0	7	5	4	3	4	10	7	24	6	11	2	73.5%	150	26.5%
Edmonds ES	390	0	0	0	0	8	4	223	3	0	0	0	0	2	0	0	5	3	0	3	8	18	15	9	33	53	3	57.2%	167	42.8%
Hazelwood ES	473	1	7	6	2	3	0	0	353	1	0	2	1	0	4	0	2	0	1	3	2	15	15	19	24	12	0	74.6%	120	25.4%
Hilltop ES	570	0	2	1	0	0	0	0	2	473	0	0	0	1	0	1	1	0	0	3	0	27	3	28	19	9	0	83.0%	97	17.0%
Lynndale ES	448	3	2	2	0	2	3	6	1	0	333	2	0	5	0	1	4	0	3	4	0	14	2	23	22	16	0	74.3%	115	25.7%
Lynnwood ES	646	1	1	3	2	5	0	0	3	5	1	465	1	7	2	1	2	0	3	5	1	23	9	56	20	30	0	72.0%	181	28.0%
Martha Lake ES	470	1	1	1	0	3	3	0	2	4	2	0	348	0	0	0	0	0	0	6	0	25	3	57	5	9	0	74.0%	122	26.0%
Meadowdale ES	518	13	0	0	0	4	1	1	1	0	3	7	0	397	1	0	4	0	3	1	0	21	5	31	10	15	0	76.6%	121	23.4%
Mountlake Terrace ES	444	0	2	3	3	7	4	0	0	0	1	2	0	0	350	0	0	2	0	6	3	11	5	25	9	11	0	78.8%	94	21.2%
Oak Heights ES	697	4	1	4	1	6	0	0	5	6	3	4	13	1	1	502	1	0	1	5	0	26	6	67	26	14	0	72.0%	195	28.0%
Seaview ES	462	1	0	0	0	4	2	4	1	0	2	0	0	3	0	0	356	0	0	0	2	9	12	13	26	27	0	77.1%	106	22.9%
Sherwood ES	615	1	1	0	0	3	0	3	0	1	1	0	0	1	0	0	0	372	0	4	4	31	17	22	64	21	69	60.5%	243	39.5%
Spruce ES	606	3	4	5	9	8	0	0	1	4	6	7	2	7	1	3	5	4	428	3	0	14	6	56	23	7	0	70.6%	178	29.4%
Terrace Park ES	263	0	5	1	2	1	0	0	0	0	0	0	0	1	6	0	0	2	0	185	0	13	3	26	12	5	1	70.3%	78	29.7%
Westgate ES	630	0	0	0	1	14	2	1	1	0	2	0	0	4	2	0	2	9	1	3	367	18	15	26	53	27	82	58.3%	263	41.7%
K-6 Subtotals	10,171	424	396	352	499	345	445	251	388	513	370	506	370	446	409	513	391	402	450	247	404	342	171	628	419	329	161	72.1%	2,842	27.9%
Out of District	313	8	8	11	4	5	2	3	7	9	9	14	19	12	7	7	9	5	10	10	5	2	99	25	16	4	3	--	313	--
K-6 Totals	10,484	432	404	363	503	350	447	254	395	522	379	520	389	458	416	520	400	407	460	257	409	344	270	653	435	333	164	--	3,155	--
Transfer In Student Total	3,155	40	41	56	38	117	30	31	42	49	46	55	41	61	66	18	44	35	32	72	42	344	270	653	435	333	164	--	--	--
Transfer In Rate	30.1%	9.3%	10.1%	15.4%	7.6%	33.4%	6.7%	12.2%	10.6%	9.4%	12.1%	10.6%	10.5%	13.3%	15.9%	3.5%	11.0%	8.6%	7.0%	28%	10.3%	100%	100%	100%	100%	100%	100%	--	--	--

Edmonds School District October 2021–22 SIS enrollment. Enrollment values omit EdCAP, full-time Running Start, and PS. Residence counts are based on current attendance area boundaries, as of the 2021–22 school year.

**Figure 7: 2021–2022 Middle School Enrollment Patterns
Residence-Attendance Matrix**

<div> <div>School of Attendance</div> <div>Attendance Area</div> </div>	Residence Count	Alderwood MS	Brier Terrace MS	College Place MS	Meadowdale MS	Edmonds Heights K-12	Edmonds K-8 Online Academy	Madrona K-8	Maplewood K-8 Co-Op	Capture Rate	Transfer Out Student Total	Transfer Out Rate
Alderwood MS	890	692	72	9	10	8	52	23	24	77.8%	198	22.2%
Brier Terrace MS	616	8	517	10	5	12	27	22	15	83.9%	99	16.1%
College Place MS	608	4	36	417	6	18	29	69	29	68.6%	191	31.4%
Meadowdale MS	862	10	37	15	671	15	43	33	38	77.8%	191	22.2%
7-8 Subtotals	2,976	714	662	451	692	53	151	147	106	77.2%	679	22.8%
Out of District	129	16	19	8	20	49	10	3	4	--	129	--
7-8 Totals	3,105	730	681	459	712	102	161	150	110	--	808	--
Transfer In Student Total	808	38	164	42	41	102	161	150	110	--	--	--
Transfer In Rate	26.0%	5.2%	24.1%	9.2%	5.8%	100%	100%	100%	100%	--	--	--

Edmonds School District October 2021–22 SIS enrollment. Enrollment values omit EdCAP, full-time Running Start, and PS. Residence counts are based on current attendance area boundaries, as of the 2021–22 school year.

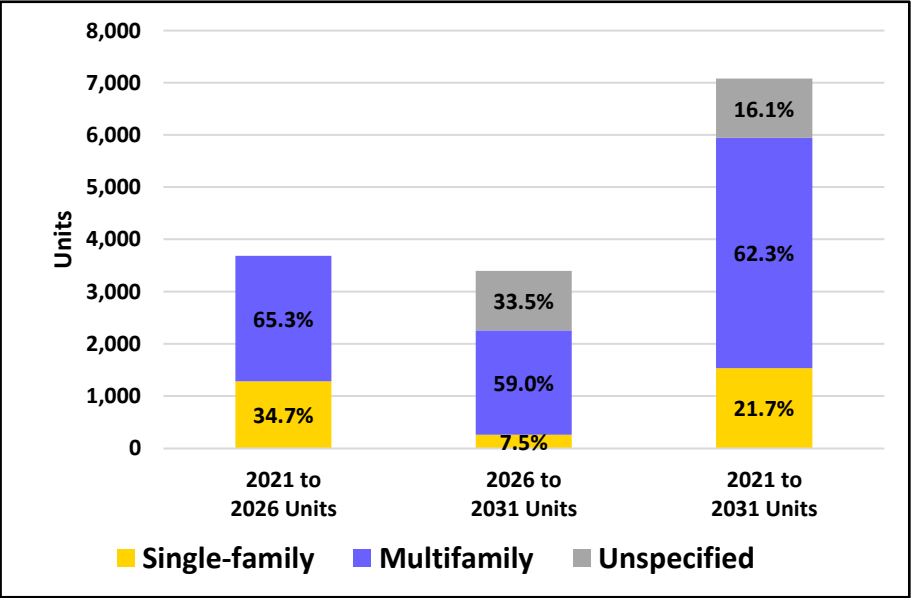
Figure 8: 2021–2022 High School Enrollment Patterns
Residence-Attendance Matrix

<div> <div>School of Attendance</div> <div>Attendance Area</div> </div>	Residence Count	Edmonds Woodway HS	Lynnwood HS	Meadowdale HS	Mountlake Terrace HS	Edmonds eLearning Academy	Edmonds Heights K-12	Scriber Lake HS	Capture Rate	Transfer Out Student Total	Transfer Out Rate
Edmonds Woodway HS	1,356	1,157	6	15	57	51	25	45	85.3%	199	14.7%
Lynnwood HS	1,563	71	1,183	31	119	105	15	39	75.7%	380	24.3%
Meadowdale HS	1,731	131	19	1,350	67	91	25	48	78.0%	381	22.0%
Mountlake Terrace HS	1,326	96	47	10	1,042	65	24	42	78.6%	284	21.4%
9-12 Subtotals	5,976	1,455	1,255	1,406	1,285	312	89	174	79.2%	1,244	20.8%
Out of District	340	47	58	39	61	32	75	28	--	340	--
9-12 Totals	6,316	1,502	1,313	1,445	1,346	344	164	202	--	1,584	--
Transfer In Student Total	1,584	345	130	95	304	344	164	202	--	--	--
Transfer In Rate	25.1%	23.0%	9.9%	6.6%	22.6%	100%	100%	100%	--	--	--

Edmonds School District October 2021–22 SIS enrollment. Enrollment values omit EdCAP, full-time Running Start, and PS. Residence counts are based on current attendance area boundaries, as of the 2021–22 school year.

Figure 9: 2021–2031 Residential Development Totals

Housing Type	2021 to 2026 Units	2026 to 2031 Units	2021 to 2031 Units
Single-family	1,280	256	1,536
Multifamily	2,405	2,003	4,408
Unspecified	0	1,137	1,137
Total	3,685	3,396	7,081



Total number of anticipated housing units by type within the enrollment forecast horizon. Percentages represent each housing type's proportion of the total number of units.

Residential Development

Point data in the map represents specific information provided by local, county, or regional data sources. Developments with less than five units are not labeled. Unspecified housing--third-party residential development data (e.g., potential in-fill, buildable lands inventory estimates) that cannot be categorized as SF or MF--is represented by the number of anticipated units per U.S. Census block group.

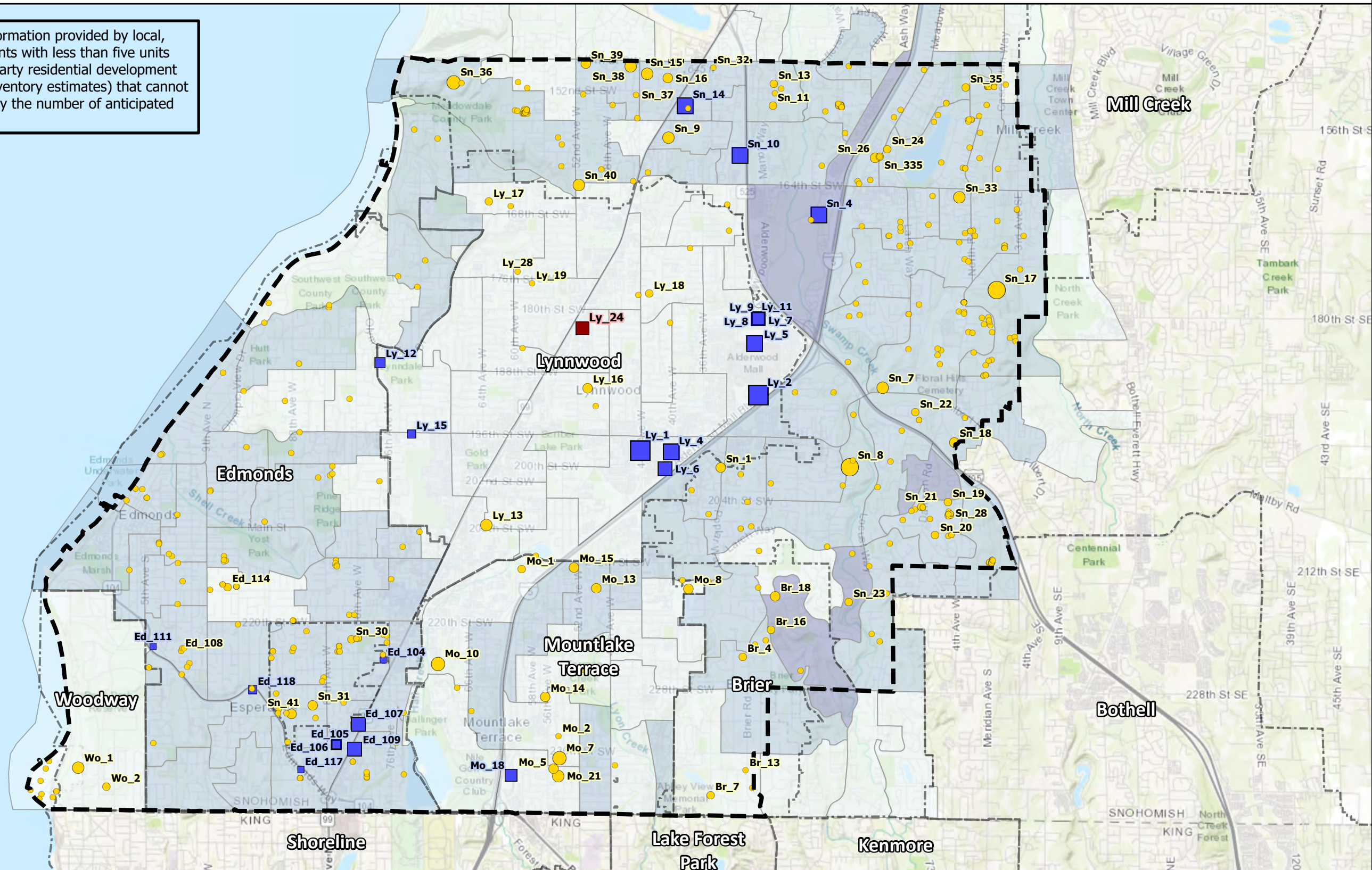


Figure 10

Figure 11: 2021–2031 Residential Development Details

Map ID	Jurisdiction	Source	Type	Total Units	Current-year to 5-year Units	5-year to 10-year Units	Current-year to 10-year Units	Beyond 10-year Units	Notes
Ly_1	Lynnwood	Lynnwood	MF	1,300	130	1,170	1,300	0	Site is north of the new light rail station; continuing to make slow progress; full build-out in the 5 to 10 year time frame
Ly_2	Lynnwood	Lynnwood	MF	383	19	364	383	0	Currently in permitting
Ly_4	Lynnwood	Lynnwood	MF	359	341	18	359	0	Redevelopment of commercial area; building permits approved
Ly_5	Lynnwood	Lynnwood	MF	328	312	16	328	0	Under Construction
Sn_10	Snohomish County	Snohomish County	MF	295	295	0	295	0	PROJECT INCLUDES ROAD ESTABLISHMENT OF ADMIRALTY WAY TO SOUTH PROPERTY LINE OF PROJECT Clearing/Grading for 295 unit multi-family community set to urban center standards on 6.2 acres. **Docs are in 19-103565 PRO**
Sn_4	Snohomish County	Snohomish County	MF	259	104	155	259	0	EPERMIT Description of Work: This project proposes to develop an approximately 5.3 ac site into a 259 unit multi-level residential apartment community comprised of 3 buildings. We are also applying for a vault permit, wall permit, and forest practice
Sn_14	Snohomish County	Snohomish County	MF	253	127	127	253	0	EPERMIT Description of Work: Pre-application meeting for construction of three apartment buildings to total 253 units.
Ed_109	Edmonds	Long-range Planner	MF	240	216	24	240	0	Design application in 2020; building permit in 2021 is likely; construction to tentatively wrap-up in 2023; Only 40-44 units will be 2br
Ly_6	Lynnwood	Lynnwood	MF	239	239	0	239	0	East of the Northline Village development
Ed_107	Edmonds	Long-range Planner	MF	192	173	19	192	0	Mostly 1-bedroom; geared towards younger folks.
Ly_7	Lynnwood	Lynnwood	MF	163	163	0	163	0	Permits to do site work are active, but no construction permits for podium or towers yet
Ly_8	Lynnwood	Lynnwood	MF	139	139	0	139	0	Permits to do site work are active, but no construction permits for podium or towers yet
Ly_9	Lynnwood	Lynnwood	MF	117	117	0	117	0	Permits to do site work are active, but no construction permits for podium or towers yet
Mo_18	Mountlake Terrace	GIS Specialist	MF	100	100	0	100	0	Under Construction
Sn_17	Snohomish County	Snohomish County	SF	88	88	0	88	0	EPERMIT Description of Work: Subdivide 15.99 acres into 88 residential lots using PRD planning methods; clearing, grading & associated infrastructure
Ly_11	Lynnwood	Lynnwood	MF	84	84	0	84	0	Permits to do site work are active, but no construction permits for podium or towers yet
Sn_8	Snohomish County	Snohomish County	SF	78	55	23	78	0	EPERMIT Description of Work: Shirah Townhomes is being proposed as a 78 unit townhome subdivision with concurrent rezone and boundary line adjustment using Snohomish County codes. The project may be developed in up to two phases.
Sn_36	Snohomish County	Snohomish County	SF	72	22	50	72	0	new proposal for 72 unit PRD development
Ed_106	Edmonds	Long-range Planner	MF	60	0	60	60	0	Removed units from Compass Housing projects, phase 1 and 2. Project no longer being considered
Mo_10	Mountlake Terrace	GIS Specialist	SF	56	56	0	56	0	Under Construction
Mo_7	Mountlake Terrace	GIS Specialist	SF	52	31	21	52	0	Land Use Review
Ly_12	Lynnwood	Lynnwood	MF	42	42	0	42	0	Have not yet started construction, but anticipated to start in 2020
Mo_21	Mountlake Terrace	GIS Specialist	SF	40	16	24	40	0	Land Use Review
Ly_13	Lynnwood	Lynnwood	SF	40	40	0	40	0	Entitlements phase - not approved yet
Sn_38	Snohomish County	Snohomish County	SF	30	27	3	30	0	Expiration date extended 120 days per Emergency Ordinance 20-027 AIRPORT INFLUENCE AREA DISCLOSURE NOTICE RECORDED AFN 202001170343 Land Disturbing Activity for construction of a 30 unit townhome development on 2.2 acres zoned MR. One year expiration no
Wo_1	Woodway	Long-term Planner	SF	30	15	15	30	0	Currently under review; town has refunded the development the deposit; developer has until 20201231 to continue without having to restart the process anew; development is still likely within the next 10 years
Sn_15	Snohomish County	Snohomish County	SF	28	20	8	28	0	ALL DOCS UNDER 20 111872 PRO Twenty-eight (28) townhouse unit-lot subdivision with supporting infrastructure, new private drive aisle road, driveways, utilities, stormwater flow control and treatment (underground detention vault), landscaping and urban f
Sn_40	Snohomish County	Snohomish County	SF	28	14	14	28	0	EPERMIT Description of Work: The Applicant is proposing a 29-unit townhouse unit lot subdivision on property zoned as MR with Future Land Use designation of Urban High Density Residential.

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Map IDs correspond to labels depicted on Figure 10.

Figure 11: 2021–2031 Residential Development Details

Map ID	Jurisdiction	Source	Type	Total Units	Current-year to 5-year Units	5-year to 10-year Units	Current-year to 10-year Units	Beyond 10-year Units	Notes
Sn_9	Snohomish County	Snohomish County	SF	28	20	8	28	0	EPERMIT Description of Work: The proposal is to subdivide the existing lot into 28 unit lots, and to construct 28 townhome units in 5 buildings. The existing home and its accessory buildings are to be removed. The new homes will take access from a drive
Ly_15	Lynnwood	Lynnwood	MF	26	0	26	26	0	Submitted June 2021, under review.
Sn_7	Snohomish County	Snohomish County	SF	26	26	0	26	0	EPERMIT Description of Work: Development of a 26 unit single family residential project
Sn_33	Snohomish County	Snohomish County	SF	26	26	0	26	0	26 unit townhome project with 5 buildings and associated private drive aisle, utility, and stormwater facilities.
Ed_105	Edmonds	Long-range Planner	MF	24	0	24	24	0	Removed units from Compass Housing projects, phase 1 and 2. Project no longer being considered
Sn_39	Snohomish County	Snohomish County	SF	23	23	0	23	0	EPERMIT Description of Work: Unit lot subdivision of previously approved site plan. 23 lots total with 7 tracts on .6 acres. SPA and LDA both approved and were done by paper submittal. This PRO houses PSD docs only.
Mo_5	Mountlake Terrace	GIS Specialist	SF	19	19	0	19	0	Land Use Approved
Ed_118	Edmonds	Long-range Planner	MF	18	18	0	18	0	One single family home will be demolished. Eighteen unit apartment complex to replace.
Mo_15	Mountlake Terrace	GIS Specialist	SF	18	7	11	18	0	Land Use Approved
Sn_18	Snohomish County	Snohomish County	SF	18	13	5	18	0	On-site grading for the PRD of Danver s Place. Construction of 18 units with assoicated road and utility installation.
Mo_14	Mountlake Terrace	GIS Specialist	SF	16	6	10	16	0	Land Use Approved
Mo_8	Mountlake Terrace	GIS Specialist	SF	16	4	12	16	0	Civil Review
Sn_1	Snohomish County	Snohomish County	SF	16	12	4	16	0	EPERMIT Description of Work: The proposal is to construct 16 townhome units in 3 buildings, with associated utilities. Existing home to be removed.
Sn_41	Snohomish County	Snohomish County	SF	15	15	0	15	0	EPERMIT Description of Work: The development proposes fifteen (15) single-family dwelling units, open space and the necessary site development improvements, i.e. grading, utilities and roadway improvements. The enclosed construction drawings depict the
Sn_16	Snohomish County	Snohomish County	SF	14	10	4	14	0	EPERMIT Description of Work: Rezone R8400 to MR and develop (zero Lot Line) 14 Unit lot Subdivision with Concurrent LDA.
Sn_31	Snohomish County	Snohomish County	SF	14	7	7	14	0	EPERMIT Description of Work: The proposal is to construct 14 single family dwelling units onsite.
Ly_16	Lynnwood	Lynnwood	SF	13	13	0	13	0	Building permits submitted.
Br_18	Brier	Brier	SF	13	13	0	13	0	13 lot subdivision; Subdivision; Housing construction has started. 6 units occupied expect completion in 2022
Ed_111	Edmonds	Long-range Planner	MF	12	12	0	12	0	One SF unit will be demolished. Twelve townhomes to replace.
Mo_13	Mountlake Terrace	GIS Specialist	SF	12	12	0	12	0	Civil Review
Sn_26	Snohomish County	Snohomish County	SF	11	6	6	11	0	Construct 11 dwelling unit townhomes or single-family attached units.
Wo_2	Woodway	Long-term Planner	SF	10	5	5	10	0	Assume 5-10 SF units constructed in 10 years on random vacant lots throughout town
Ed_117	Edmonds	Long-range Planner	MF	10	10	0	10	0	Four Housing units will be demolished. Ten townhomes to replace.
Br_7	Brier	Brier	SF	10	10	0	10	0	Project is being revisited City had a pre-app for a 10ish lot subdivision.
Sn_24	Snohomish County	Snohomish County	SF	9	9	0	9	0	Expiration date extended 120 days per Emergency Ordinance 20-027 Site plan review using Urban Residential Design Standards for a 9-lot short plat.
Sn_13	Snohomish County	Snohomish County	SF	9	9	0	9	0	Expiration date extended 120 days per Emergency Ordinance 20-027 EPERMIT Description of Work: 9-unit SFDU project approved under PFN 16-110052 SPA Stormwater Facility Easement AFN: 201907260310
Sn_20	Snohomish County	Snohomish County	SF	9	7	2	9	0	9 lot Unit Lot Subdivision utilizing URDS. Rezone from R-8400 to R-7200. ACUP for ULS in R-7200 zone.
Sn_335	Snohomish County	Snohomish County	SF	8	8	0	8	0	Permit Type: Townhouse; Status: Issued; Description: New 8 unit townhouse building
Sn_30	Snohomish County	Snohomish County	SF	8	4	4	8	0	EPERMIT Description of Work: Edmonds 222nd SFDU is an 8-unit SFDU development located at 8020 222nd St SW in Snohomish County. The proposal also includes the submittal of a Land Disturbing Activity Permit to allow for the construction of a drive aisle t
Mo_1	Mountlake Terrace	GIS Specialist	SF	8	8	0	8	0	Land Use Review

Record represents a unique single-family (SF) or multifamily (MF) residential developments, unless noted as sum of developments with < 5 units or Unspecified (UN) developments sourced from Esri.

Map IDs correspond to labels depicted on Figure 10.

Figure 11: 2021–2031 Residential Development Details

Map ID	Jurisdiction	Source	Type	Total Units	Current-year to 5-year Units	5-year to 10-year Units	Current-year to 10-year Units	Beyond 10-year Units	Notes
Br_16	Brier	Brier	SF	8	8	0	8	0	8 lot subdivision
Sn_28	Snohomish County	Snohomish County	SF	8	8	0	8	0	EPERMIT Description of Work: 8 Single Family Detached Units
Ed_114	Edmonds	Long-range Planner	SF	7	7	0	7	0	Three SF units will be demolished. 10 new SF to replace.
Ed_104	Edmonds	Long-range Planner	MF	7	7	0	7	0	
Ly_17	Lynnwood	Lynnwood	SF	7	7	0	7	0	Preliminary approval received, however owner selling property. Neighborhood dispute re: project.
Ly_18	Lynnwood	Lynnwood	SF	7	7	0	7	0	Plat not recorded
Sn_19	Snohomish County	Snohomish County	SF	7	4	3	7	0	EPERMIT Description of Work: Applicant is looking to permit 7 single family dwelling units in the LDMR zoning using the site plan process. There is an existing house which will stay and become one of the units in the site plan approval process. Applicant
Sn_35	Snohomish County	Snohomish County	SF	6	3	3	6	0	EPERMIT Description of Work: 6-lot short plat proposing four duplex lots and two single-family residential lots. The parcel (00509500005401) and project site's western and southern boundary lines boarder Martha Lake Airport Park preventing any furthe
Sn_11	Snohomish County	Snohomish County	SF	6	6	0	6	0	Site Plan Application for 6 Single Family Detached Units within 3 Duplexes.
Sn_23	Snohomish County	Snohomish County	SF	6	6	0	6	0	EPERMIT Description of Work: Six lot single-family residential short plat (utilizing the lot size averaging code previsions) with supporting infrastructure, new public road, driveways, utilities, stormwater flow control and treatment (open infiltration p
Br_4	Brier	Brier	SF	6	6	0	6	0	7 lot subdivision; 6 new sfr; Prelim approval, but no construction yet
Sn_22	Snohomish County	Snohomish County	SF	6	3	3	6	0	6-Lot Short Subdivision - Detached SFR Duplex Units 1/8/18 RMF - files routed to records room, TR file to Jeanne-Marie
Sn_21	Snohomish County	Snohomish County	SF	6	5	1	6	0	The proposal is to subdivide the property into 3 lots followed by the construction of one duplex per lot, for a total of 6 units. The site will be accessed via a 20 drive aisle and a 5 sidewalk which will be contained in a 25 easement
Sn_37	Snohomish County	Snohomish County	SF	5	5	0	5	0	EPERMIT Description of Work: The proposal is to construct 5 townhomes on .53 acres with associated utilities. The existing home and driveway will be removed. The access to the site will be from 44th Ave W
Ed_108	Edmonds	Long-range Planner	SF	5	5	0	5	0	
Mo_2	Mountlake Terrace	GIS Specialist	SF	5	5	0	5	0	Civil Review
Ly_28	Lynnwood	Lynnwood	SF	5	5	0	5	0	Preliminary approval received.
Ly_19	Lynnwood	Lynnwood	SF	5	5	0	5	0	Entitlements phase - not approved yet
Sn_32	Snohomish County	Snohomish County	SF	5	5	0	5	0	Expiration date extended 120 days per Emergency Ordinance 20-027 **ALL DOCUMENTS UNDER 19-103954 PRO** Construct 5 townhomes in one building with accompanying utilities on 0.26 acres of land.
Br_13	Brier	Brier	SF	5	5	0	5	0	6 lot subdivision; Subdivision; Prelim approval, Construction began 2021 on hold for winter.
Ly_24	Lynnwood	Lynnwood	MF	-242	-242	0	-242	0	Whispering Pines affordable MF housing development (242 units) is expected have been decommissioned at the time of this writing due to fire code violations.
NA	Snohomish County	Assorted	SF	338	331	7	338	0	Sum of developments with less than 5 units in 2021-2031period or developments sourced from Esri
NA	Snohomish County	Assorted	UN	2,279	0	683	683	1,596	Sum of developments with less than 5 units in 2021-2031period or developments sourced from Esri
NA	Edmonds	Assorted	SF	120	120	0	120	0	Sum of developments with less than 5 units in 2021-2031period or developments sourced from Esri
NA	Edmonds	Assorted	UN	808	0	323	323	485	Sum of developments with less than 5 units in 2021-2031period or developments sourced from Esri
NA	Mountlake Terrace	Assorted	SF	10	8	2	10	0	Sum of developments with less than 5 units in 2021-2031period or developments sourced from Esri
NA	Mountlake Terrace	Assorted	UN	235	0	70	70	165	Sum of developments with less than 5 units in 2021-2031period or developments sourced from Esri
NA	Lynnwood	Assorted	SF	26	26	0	26	0	Sum of developments with less than 5 units in 2021-2031period or developments sourced from Esri
NA	Brier	Assorted	SF	16	16	0	16	0	Sum of developments with less than 5 units in 2021-2031period or developments sourced from Esri
NA	Brier	Assorted	UN	87	0	61	61	27	Sum of developments with less than 5 units in 2021-2031period or developments sourced from Esri
TOTALS				9,353	3,685	3,396	7,081	2,272	

Record represents a unique single-family (SF) or multifamily (MF) residential developments, unless noted as sum of developments with < 5 units or Unspecified (UN) developments sourced from Esri.

Map IDs correspond to labels depicted on Figure 10.

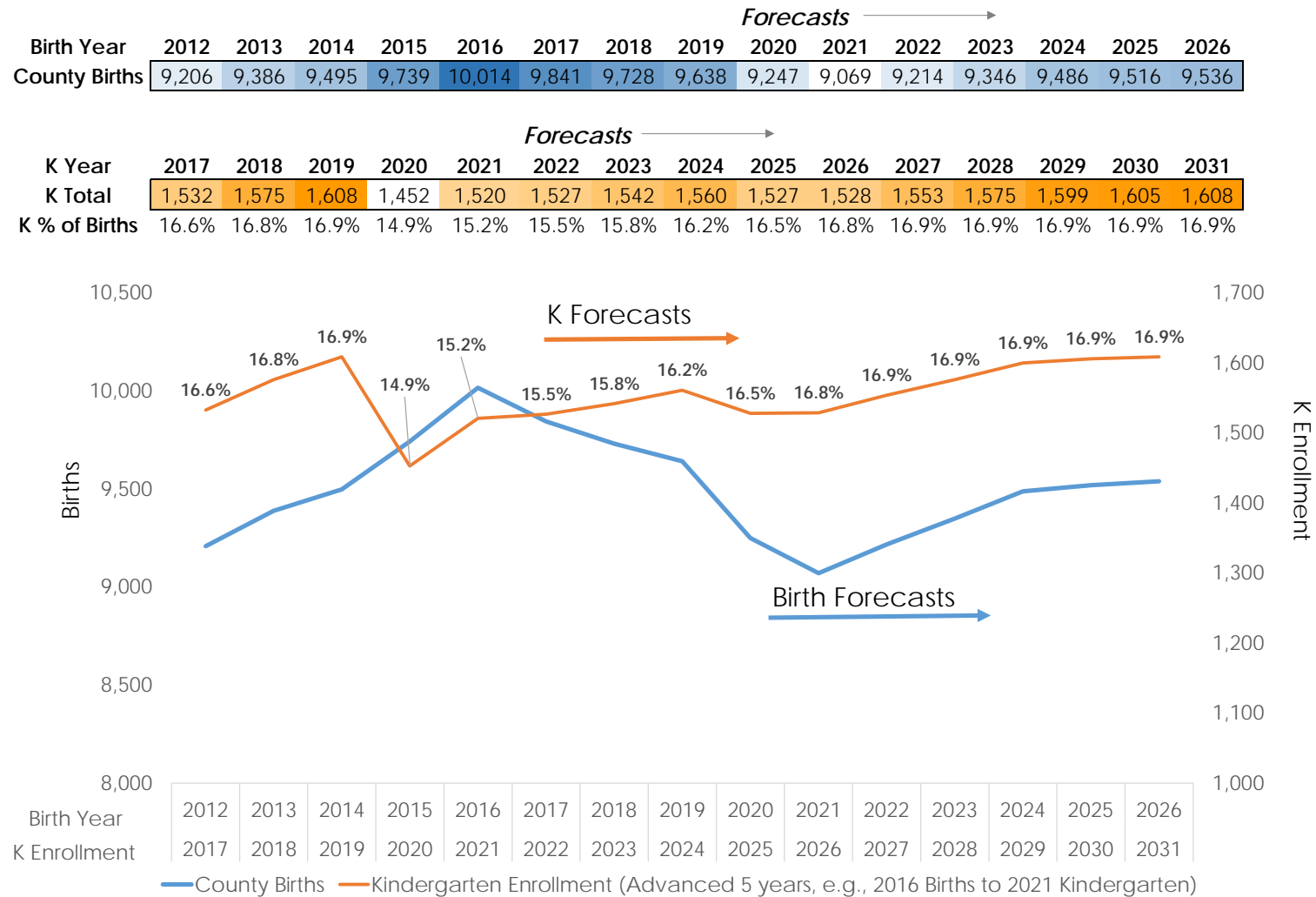
Figure 12: Student Generation Rates

Summary of Generation Rates Used for New Development	K-12 Students per Single-Family (SF) Unit	K-12 Students per Multifamily (MF) Unit
<i>Overall Average Rates</i>	<i>0.39</i>	<i>0.18</i>
Highest Rate Used for a Development	0.73	0.39
Lowest Rate Used for a Development	0.20	0.11

While overall average student generation rates used in preparing the forecasts were 0.39 K-12 students/SF unit and 0.18 K-12 students/MF unit, the specific rates used for each development were carefully determined on an individual basis. Broadly speaking, we merge as much information as possible when determining rates to apply to each development. Information considered includes:

- 1) existing students per housing unit for SF and MF within individual neighborhoods
- 2) development-specific expectations provided by planners (e.g., housing targeting families)
- 3) educated assumptions about new or changing housing development trends.

Figure 13: County Birth Rates



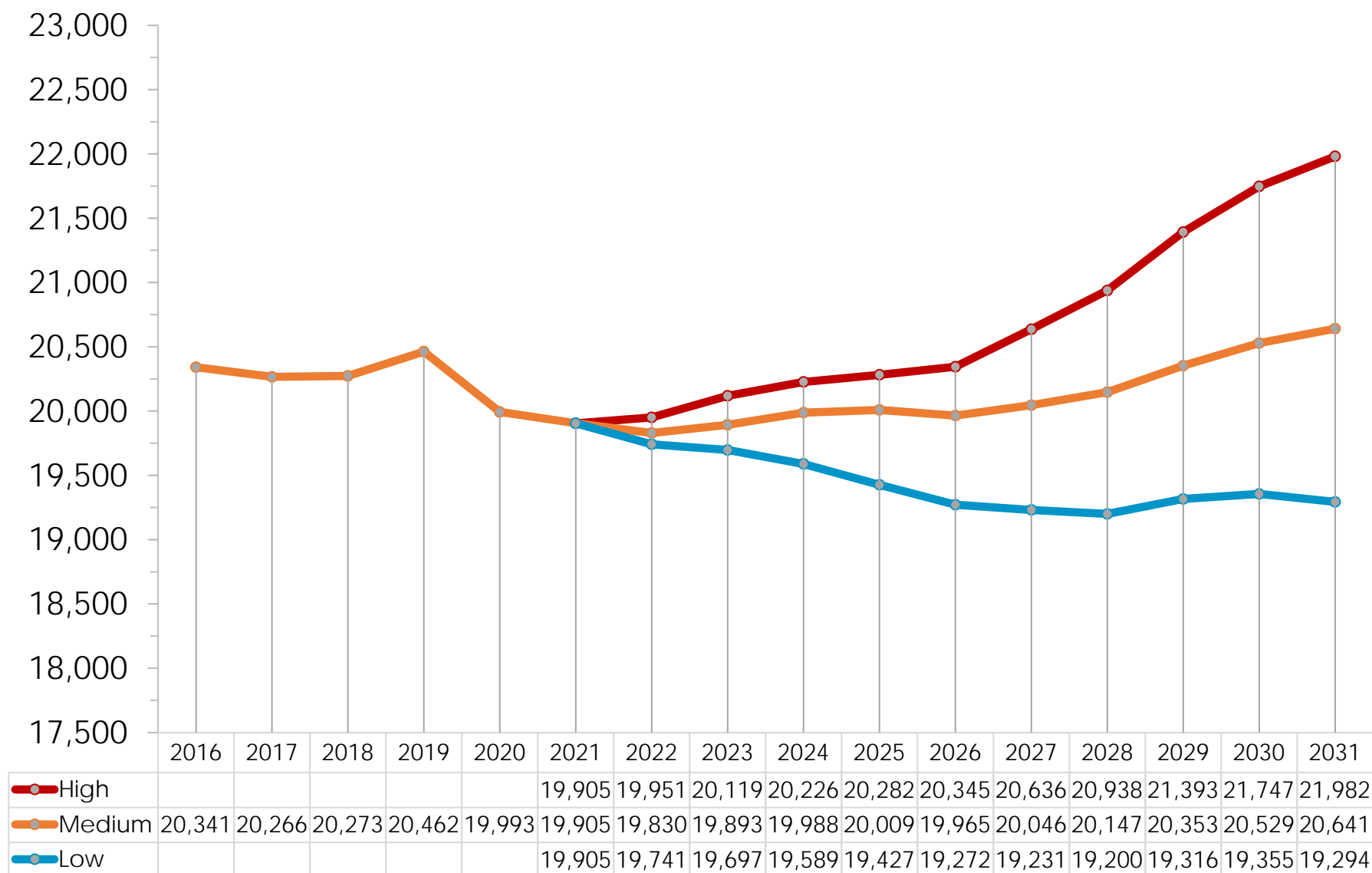
WA DOH 2012 to 2019 historical live births to mothers residing in Snohomish County, as well as Edmonds School District Monthly Enrollment Report (P223 Headcount) October K enrollment for the 2017–18 to 2021–22 school years. The metric “K % of Births” is calculated by dividing each K class by the live birth total five years earlier (e.g., 2019 K class divided by 2014 births). 2020–25 births, which inform K classes beginning with the 2025–26 school year, were projected based on a review of the historical birth data. Forecasts of future K class sizes were then developed by employing forecasts of trends in “K % of Births”. Note that birth values reported by WA DOH represent the January 1st through December 31st calendar year, and therefore do not align directly with K enrollment 5 years later (i.e., August cutoff for being age 5 to enroll in K in the fall).

Figure 14: Grade Progression Ratios

Grade Progression	2017-18	2018-19	2019-20	2020-21	2021-22	3-year Avg	2-year Avg	Fcst GPR
K-1	0.98	1.02	1.02	0.96	1.02	1.00	0.99	1.01
1-2	1.01	0.97	1.01	0.97	0.99	0.99	0.98	0.99
2-3	1.00	0.99	1.00	0.97	0.99	0.98	0.98	0.99
3-4	1.00	0.99	1.00	0.98	0.97	0.98	0.98	0.99
4-5	0.99	1.00	1.02	0.97	0.95	0.98	0.96	0.99
5-6	1.01	1.02	1.03	0.98	0.98	1.00	0.98	1.01
6-7	0.97	0.99	1.01	0.98	0.97	0.98	0.97	0.98
7-8	1.00	1.01	1.01	0.99	0.98	0.99	0.98	1.00
8-9	1.03	1.05	1.05	1.02	1.03	1.03	1.03	1.03
9-10	1.02	0.99	1.02	0.99	0.99	1.00	0.99	1.01
10-11	0.94	0.95	0.94	0.95	0.96	0.95	0.96	0.94
11-12	1.01	1.03	0.98	1.01	1.07	1.02	1.04	1.00

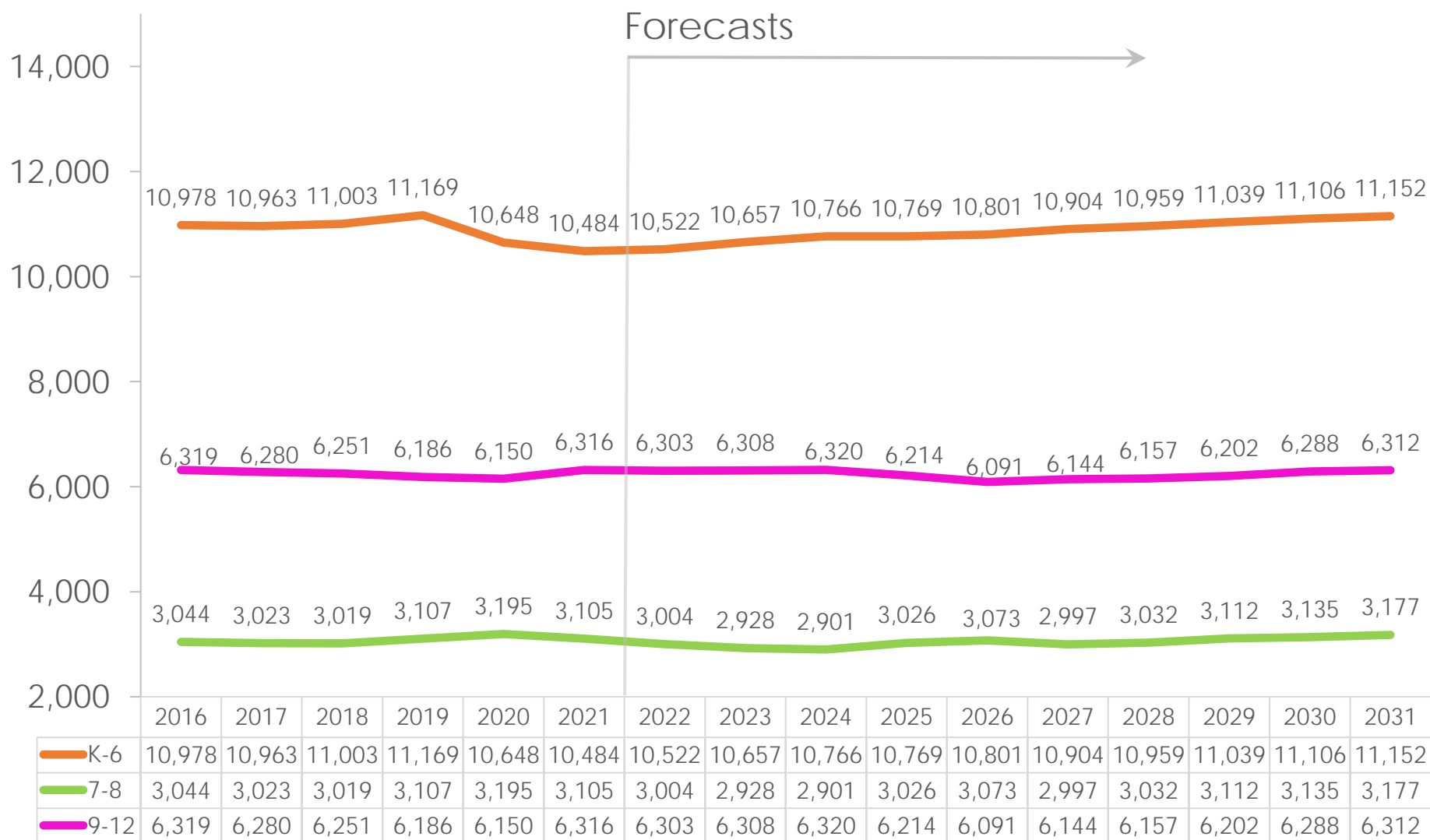
2017–18 to 2021–22 Grade Progression Ratios (GPR) based on Edmonds School District Monthly Enrollment Report (P223 Headcount) October enrollment. GPRs are calculated as the ratio of enrollment in a specific grade in a given year, to the enrollment of the same age cohort in the previous year. For instance, when 150 kindergarteners in 2017 become 140 first graders in 2018, a GPR of 0.93 is yielded. GPRs quantify how cohort sizes change as students progress to subsequent grades by considering that not all students advance to the next grade and new students join existing cohorts. A GPR value greater than 1.0 indicates that the student cohort increased in size from one grade to the next. Such a result may be due to students moving into the district, students choosing to transfer into the district from other districts (public or private). Conversely, a GPR value less than 1.0 indicates that the student cohort decreased in size from one grade to the next. This may be due to students moving out of the district, students choosing to transfer to other districts, or students not advancing to the next grade.

Figure 15: Districtwide Building Attendance Enrollment Forecasts: Low, Medium, and High Scenarios



Edmonds School District Monthly Enrollment Report (P223 Headcount) October 2016–17 to 2021–22 enrollment and FLO 2022–23 to 2031–32 enrollment forecasts. Enrollment values include all students living within and outside the district boundary, except for students attending EdCAP, full-time Running Start, and PS.

**Figure 16: Building Attendance Enrollment Forecasts by Grade Group:
Medium (Preferred) Scenario**




Edmonds School District Monthly Enrollment Report (P223 Headcount) October 2016–17 to 2021–22 enrollment and FLO 2022–23 to 2031–32 enrollment forecasts. Enrollment values include all students living within and outside the district boundary, except for students attending EdCAP, full-time Running Start, and PS.

Figure 17: Residence-Based Enrollment Forecasts by Individual Grade

	Grade	2021	2022	2023	2024	2025	2026	2027	2028	2029	2030	2031
	K	1,485	1,482	1,496	1,514	1,481	1,482	1,506	1,529	1,552	1,557	1,561
	1	1,439	1,511	1,508	1,523	1,542	1,509	1,510	1,535	1,557	1,580	1,585
	2	1,481	1,435	1,508	1,505	1,520	1,539	1,507	1,508	1,532	1,554	1,577
	3	1,505	1,479	1,435	1,507	1,505	1,520	1,540	1,509	1,510	1,533	1,554
	4	1,424	1,496	1,470	1,427	1,499	1,497	1,513	1,533	1,502	1,503	1,526
	5	1,372	1,414	1,486	1,460	1,419	1,490	1,489	1,506	1,526	1,495	1,496
	6	1,465	1,390	1,436	1,508	1,481	1,441	1,512	1,513	1,531	1,552	1,521
	7	1,439	1,438	1,365	1,412	1,483	1,456	1,415	1,487	1,489	1,508	1,529
	8	1,537	1,441	1,441	1,368	1,417	1,489	1,458	1,418	1,493	1,497	1,516
	9	1,524	1,596	1,494	1,494	1,419	1,472	1,546	1,509	1,471	1,550	1,556
	10	1,490	1,536	1,608	1,507	1,507	1,432	1,482	1,557	1,521	1,484	1,567
	11	1,417	1,408	1,452	1,520	1,425	1,426	1,353	1,400	1,471	1,438	1,405
12	1,545	1,424	1,415	1,460	1,528	1,433	1,432	1,359	1,405	1,477	1,444	
Residing in District (Residence-Based)	K-6	10,171	10,208	10,339	10,445	10,448	10,478	10,578	10,632	10,710	10,774	10,819
	7-8	2,976	2,880	2,806	2,780	2,901	2,945	2,873	2,906	2,982	3,005	3,045
	9-12	5,976	5,963	5,969	5,980	5,879	5,763	5,813	5,825	5,868	5,950	5,972
	K-12	19,123	19,051	19,114	19,205	19,227	19,187	19,265	19,363	19,560	19,728	19,836
Out-of-District	K-6	313	314	318	321	322	322	326	327	330	332	333
	7-8	129	125	122	121	126	128	125	126	129	130	132
	9-12	340	339	340	340	334	328	331	331	334	339	340
	K-12	782	778	779	782	782	778	781	785	793	800	805
Total Attendance (Building Attendance)	K-6	10,484	10,522	10,657	10,766	10,769	10,801	10,904	10,959	11,039	11,106	11,152
	7-8	3,105	3,004	2,928	2,901	3,026	3,073	2,997	3,032	3,112	3,135	3,177
	9-12	6,316	6,303	6,308	6,320	6,214	6,091	6,144	6,157	6,202	6,288	6,312
	K-12	19,905	19,830	19,893	19,988	20,009	19,965	20,046	20,147	20,353	20,529	20,641

Edmonds Monthly Enrollment Report (P223 headcount) October 2021–22 enrollment and FLO 2022–23 to 2031–31 enrollment forecasts (medium-growth, or preferred, scenario). Enrollment values exclude students attending EdCAP, full-time Running Start, and PS.


Figure 18: Residence-Based Enrollment Forecasts by Elementary School Attendance Area

Attendance Area	Students Residing* 						
	2021	2022	2023	2024	2025	2026	2031
Beverly ES	533	539	536	549	553	570	589
Brier ES	461	462	474	478	471	472	488
Cedar Valley ES	418	424	428	446	447	447	514
Cedar Way ES	665	648	648	648	643	637	650
Chase Lake ES	328	333	328	330	325	326	329
College Place ES	563	558	571	578	570	564	560
Edmonds ES	404	403	399	403	402	393	404
Hazelwood ES	467	481	477	483	490	490	508
Hilltop ES	550	562	573	563	577	583	602
Lynndale ES	445	447	457	459	452	451	450
Lynnwood ES	627	624	646	668	689	701	726
Martha Lake ES	477	478	491	505	510	505	502
Meadowdale ES	529	529	524	535	530	523	537
Mountlake Terrace ES	450	442	450	451	450	441	465
Oak Heights ES	663	666	683	685	681	692	718
Seaview ES	424	427	423	422	410	409	422
Sherwood ES	630	632	640	625	615	623	646
Spruce ES	657	683	694	719	722	740	781
Terrace Park ES	256	251	255	255	257	253	252
Westgate ES	621	620	642	643	653	659	674
K-6	10,171	10,208	10,339	10,445	10,448	10,478	10,819

**313 elementary school students residing out-of-district.*

Edmonds Monthly Enrollment Report (P223 headcount) October 2021–22 enrollment and FLO 2022–23 to 2031–31 enrollment forecasts (medium-growth, or preferred, scenario). Enrollment values exclude students attending EdCAP, full-time Running Start, and PS.

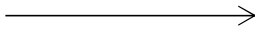
Figure 19: Residence-Based Enrollment Forecasts by Middle School Attendance Area

Attendance Area	Students Residing* 					
	2021	2022	2023	2024	2025	2031
Alderwood MS	887	863	823	808	831	931
Brier Terrace MS	604	581	558	540	573	589
College Place MS	610	616	605	616	660	650
Meadowdale MS	875	819	821	816	836	875
7-8	2,976	2,880	2,806	2,780	2,901	3,045

**129 middle school students residing out-of-district.*

Edmonds Monthly Enrollment Report (P223 headcount) October 2021–22 enrollment and FLO 2022–23 to 2031–31 enrollment forecasts (medium-growth, or preferred, scenario). Enrollment values exclude students attending EdCAP, full-time Running Start, and PS.

Figure 20: Residence-Based Enrollment Forecasts by High School Attendance Area

Attendance Area	Students Residing* 						
	2021	2022	2023	2024	2025	2026	2031
Edmonds-Woodway HS	1,361	1,276	1,266	1,284	1,219	1,239	1,263
Lynnwood HS	1,545	1,531	1,552	1,559	1,532	1,498	1,646
Meadowdale HS	1,749	1,771	1,785	1,754	1,745	1,685	1,699
Mountlake Terrace HS	1,321	1,385	1,366	1,383	1,382	1,341	1,364
9-12	5,976	5,963	5,969	5,980	5,879	5,763	5,972

**340 high school students residing out-of-district.*

Edmonds Monthly Enrollment Report (P223 headcount) October 2021–22 enrollment and FLO 2022–23 to 2031–31 enrollment forecasts (medium-growth, or preferred, scenario). Enrollment values exclude students attending EdCAP, full-time Running Start, and PS.

Figure 21: Building Attendance Enrollment Forecasts by Individual Grade

Grade	2021	2022	2023	2024	2025	2026	2027	2028	2029	2030	2031
K	1,520	1,527	1,542	1,560	1,527	1,528	1,553	1,575	1,599	1,605	1,608
1	1,478	1,556	1,554	1,569	1,588	1,555	1,557	1,581	1,604	1,628	1,633
2	1,531	1,480	1,553	1,551	1,566	1,585	1,554	1,555	1,579	1,601	1,624
3	1,546	1,524	1,481	1,553	1,551	1,566	1,587	1,555	1,557	1,580	1,602
4	1,476	1,540	1,515	1,473	1,545	1,543	1,560	1,580	1,549	1,550	1,573
5	1,417	1,459	1,531	1,505	1,465	1,536	1,535	1,552	1,573	1,543	1,543
6	1,516	1,435	1,481	1,554	1,527	1,487	1,559	1,560	1,578	1,599	1,569
7	1,498	1,501	1,426	1,472	1,546	1,520	1,477	1,550	1,554	1,573	1,595
8	1,607	1,504	1,502	1,429	1,480	1,553	1,520	1,481	1,557	1,562	1,582
9	1,599	1,681	1,579	1,579	1,503	1,554	1,629	1,592	1,554	1,635	1,641
10	1,559	1,621	1,693	1,592	1,591	1,514	1,565	1,640	1,605	1,569	1,652
11	1,507	1,493	1,537	1,605	1,509	1,508	1,436	1,483	1,554	1,522	1,490
12	1,651	1,508	1,500	1,545	1,611	1,515	1,515	1,442	1,489	1,562	1,529
K-6	10,484	10,522	10,657	10,766	10,769	10,801	10,904	10,959	11,039	11,106	11,152
7-8	3,105	3,004	2,928	2,901	3,026	3,073	2,997	3,032	3,112	3,135	3,177
9-12	6,316	6,303	6,308	6,320	6,214	6,091	6,144	6,157	6,202	6,288	6,312
K-12	19,905	19,830	19,893	19,988	20,009	19,965	20,046	20,147	20,353	20,529	20,641

Total Attendance
(Building Attendance)

Edmonds Monthly Enrollment Report (P223 headcount) October 2021–22 enrollment and FLO 2022–23 to 2031–31 enrollment forecasts (medium-growth, or preferred, scenario). Enrollment values exclude students attending EdCAP, full-time Running Start, and PS.

Figure 22: Building Attendance Enrollment Forecasts by Elementary School/Program

Building/Program	Building Attendance →						
	2021	2022	2023	2024	2025	2026	2031
Beverly ES	432	478	474	486	492	505	524
Brier ES	404	417	426	432	425	428	443
Cedar Valley ES	363	402	408	424	425	424	486
Cedar Way ES	503	530	532	530	527	522	536
Chase Lake ES	350	385	384	387	382	383	389
College Place ES	447	463	474	480	474	467	466
Edmonds ES	254	267	263	269	267	259	270
Hazelwood ES	395	417	414	419	425	427	445
Hilltop ES	522	539	552	542	557	561	583
Lynndale ES	379	403	410	416	408	407	409
Lynnwood ES	520	552	574	595	613	625	652
Martha Lake ES	389	450	465	479	483	479	478
Meadowdale ES	458	498	497	506	504	498	514
Mountlake Terrace ES	416	434	442	445	444	434	460
Oak Heights ES	520	556	573	573	570	581	605
Seaview ES	400	372	369	368	357	357	371
Sherwood ES	407	437	446	432	425	433	452
Spruce ES	460	579	590	612	615	630	666
Terrace Park ES	257	273	278	278	278	276	279
Westgate ES	409	430	447	447	457	462	477
Woodway Center *	164	158	160	163	159	160	166
Edmonds K-8 Online †	653	21	22	22	22	22	24
Challenge ES	344	337	337	337	337	337	337
Edmonds Heights K-12	270	312	312	312	312	312	312
Madrona K-8	435	453	453	453	453	453	453
Maplewood K-8 Co-Op	333	356	356	356	356	356	356
K-6	10,484	10,522	10,657	10,766	10,769	10,801	11,152

Edmonds Monthly Enrollment Report (P223 headcount) October 2021–22 enrollment and FLO 2022–23 to 2031–31 enrollment forecasts (medium-growth, or preferred, scenario). Enrollment values exclude students attending EdCAP, full-time Running Start, and PS. Slight differences may exist between the grade group total reported above and the value reported in the "Building Attendance Enrollment Forecasts by Individual Grade" figure. This is due to rounding during the allocation of students to schools/programs.

* Opened in the 2021–22 school year to service K students for Sherwood ES and Westgate ES

† Students attending the Edmonds K-8 Online Academy in 2021–22 are forecasted to attend their school of residence in 2022–23 to 2031–32; the denoted values represent the students forecasted to attend the Edmonds K-8 Online Academy that live outside the district boundary (i.e., students that do not have a school of residence)

Figure 23: Building Attendance Enrollment Forecasts by Middle School/Program

Attendance Area	Building Attendance →						
	2021	2022	2023	2024	2025	2026	2031
Alderwood MS	730	755	717	704	727	757	818
Brier Terrace MS	681	668	641	622	662	671	689
College Place MS	459	491	479	489	530	517	524
Meadowdale MS	712	711	712	707	728	748	767
Edmonds K-8 Online †	161	9	8	8	9	9	10
Edmonds Heights K-12	102	107	107	107	107	107	107
Madrona K-8	150	148	148	148	148	148	148
Maplewood K-8 Co-Op	110	116	116	116	116	116	116
7-8	3,105	3,004	2,928	2,901	3,026	3,073	3,177

Edmonds Monthly Enrollment Report (P223 headcount) October 2021–22 enrollment and FLO 2022–23 to 2031–31 enrollment forecasts (medium-growth, or preferred, scenario). Enrollment values exclude students attending EdCAP, full-time Running Start, and PS. Slight differences may exist between the grade group total reported above and the value reported in the "Building Attendance Enrollment Forecasts by Individual Grade" figure. This is due to rounding during the allocation of students to schools/programs.

† Students attending the Edmonds K-8 Online Academy in 2021–22 are forecasted to attend their school of residence in 2022–23 to 2031–32; the denoted values represent the students forecasted to attend the Edmonds K-8 Online Academy that live outside the district boundary (i.e., students that do not have a school of residence)

Figure 24: Building Attendance Enrollment Forecasts by High School/Program

Attendance Area	Building Attendance →						
	2021	2022	2023	2024	2025	2026	2031
Edmonds-Woodway HS	1,502	1,467	1,458	1,475	1,412	1,417	1,454
Lynnwood HS	1,313	1,332	1,348	1,355	1,329	1,296	1,427
Meadowdale HS	1,445	1,517	1,530	1,502	1,494	1,439	1,459
Mountlake Terrace HS	1,346	1,426	1,412	1,428	1,418	1,378	1,413
Edmonds Heights K-12	164	164	164	164	164	164	164
Edmonds Online Academy	344	196	196	196	196	196	196
Scriber Lake HS	202	201	201	201	201	201	201
9-12	6,316	6,303	6,308	6,320	6,214	6,091	6,312

Edmonds Monthly Enrollment Report (P223 headcount) October 2021–22 enrollment and FLO 2022–23 to 2031–31 enrollment forecasts (medium-growth, or preferred, scenario). Enrollment values exclude students attending EdCAP, full-time Running Start, and PS. Slight differences may exist between the grade group total reported above and the value reported in the "Building Attendance Enrollment Forecasts by Individual Grade" figure. This is due to rounding during the allocation of students to schools/programs.

Figure 25: Building Attendance Enrollment Forecasts by Individual Grade: High Scenario

Grade	2021	2022	2023	2024	2025	2026	2027	2028	2029	2030	2031
K	1,520	1,542	1,563	1,587	1,558	1,564	1,591	1,613	1,645	1,650	1,654
1	1,478	1,576	1,589	1,610	1,634	1,605	1,623	1,651	1,673	1,705	1,710
2	1,531	1,512	1,607	1,620	1,641	1,665	1,648	1,666	1,694	1,716	1,749
3	1,546	1,462	1,450	1,540	1,552	1,572	1,608	1,591	1,608	1,634	1,655
4	1,476	1,589	1,500	1,488	1,579	1,592	1,624	1,660	1,644	1,660	1,687
5	1,417	1,524	1,650	1,557	1,544	1,639	1,663	1,697	1,736	1,718	1,734
6	1,516	1,406	1,513	1,638	1,546	1,533	1,636	1,662	1,697	1,735	1,718
7	1,498	1,521	1,416	1,523	1,651	1,560	1,551	1,657	1,687	1,723	1,764
8	1,607	1,488	1,506	1,404	1,516	1,640	1,551	1,547	1,656	1,687	1,724
9	1,599	1,610	1,498	1,517	1,414	1,520	1,644	1,563	1,561	1,671	1,703
10	1,559	1,602	1,603	1,492	1,510	1,410	1,520	1,642	1,566	1,566	1,677
11	1,507	1,579	1,606	1,606	1,494	1,514	1,419	1,529	1,653	1,580	1,579
12	1,651	1,539	1,618	1,645	1,643	1,531	1,558	1,459	1,573	1,701	1,628
K-6	10,484	10,611	10,872	11,039	11,053	11,170	11,394	11,540	11,695	11,819	11,908
7-8	3,105	3,009	2,922	2,927	3,168	3,200	3,102	3,205	3,344	3,410	3,488
9-12	6,316	6,331	6,325	6,260	6,061	5,974	6,141	6,193	6,353	6,518	6,586
K-12	19,905	19,951	20,119	20,226	20,282	20,345	20,636	20,938	21,393	21,747	21,982

Total Attendance
(Building Attendance)

Edmonds Monthly Enrollment Report (P223 headcount) October 2021–22 enrollment and FLO 2022–23 to 2031–31 enrollment forecasts (high-growth scenario). Enrollment values exclude students attending EdCAP, full-time Running Start, and PS.

Figure 26: Building Attendance Enrollment Forecasts by Individual Grade: Low Scenario

Grade	2021	2022	2023	2024	2025	2026	2027	2028	2029	2030	2031
K	1,520	1,527	1,534	1,543	1,503	1,496	1,514	1,527	1,549	1,554	1,557
1	1,478	1,557	1,555	1,561	1,570	1,529	1,520	1,538	1,551	1,573	1,577
2	1,531	1,494	1,569	1,566	1,572	1,581	1,538	1,528	1,545	1,559	1,580
3	1,546	1,445	1,416	1,486	1,483	1,489	1,496	1,454	1,444	1,461	1,473
4	1,476	1,571	1,465	1,435	1,505	1,503	1,507	1,513	1,471	1,461	1,477
5	1,417	1,507	1,612	1,503	1,472	1,544	1,539	1,543	1,550	1,507	1,496
6	1,516	1,391	1,479	1,582	1,475	1,444	1,513	1,508	1,512	1,519	1,476
7	1,498	1,505	1,385	1,472	1,577	1,471	1,435	1,504	1,501	1,505	1,511
8	1,607	1,474	1,476	1,360	1,449	1,548	1,438	1,407	1,475	1,471	1,475
9	1,599	1,592	1,469	1,471	1,355	1,436	1,534	1,426	1,396	1,461	1,457
10	1,559	1,588	1,571	1,449	1,449	1,335	1,415	1,509	1,405	1,376	1,439
11	1,507	1,565	1,577	1,560	1,436	1,438	1,324	1,401	1,496	1,393	1,363
12	1,651	1,526	1,589	1,601	1,582	1,457	1,458	1,341	1,421	1,517	1,411
K-6	<i>10,484</i>	<i>10,491</i>	<i>10,630</i>	<i>10,677</i>	<i>10,579</i>	<i>10,586</i>	<i>10,626</i>	<i>10,611</i>	<i>10,623</i>	<i>10,632</i>	<i>10,637</i>
7-8	<i>3,105</i>	<i>2,979</i>	<i>2,861</i>	<i>2,831</i>	<i>3,025</i>	<i>3,019</i>	<i>2,873</i>	<i>2,911</i>	<i>2,976</i>	<i>2,976</i>	<i>2,987</i>
9-12	<i>6,316</i>	<i>6,271</i>	<i>6,207</i>	<i>6,081</i>	<i>5,822</i>	<i>5,667</i>	<i>5,731</i>	<i>5,678</i>	<i>5,718</i>	<i>5,747</i>	<i>5,670</i>
K-12	<i>19,905</i>	<i>19,741</i>	<i>19,697</i>	<i>19,589</i>	<i>19,427</i>	<i>19,272</i>	<i>19,231</i>	<i>19,200</i>	<i>19,316</i>	<i>19,355</i>	<i>19,294</i>

Total Attendance
(Building Attendance)

Edmonds Monthly Enrollment Report (P223 headcount) October 2021–22 enrollment and FLO 2022–23 to 2031–31 enrollment forecasts (low-growth scenario). Enrollment values exclude students attending EdCAP, full-time Running Start, and PS.

Appendix B
Determination of Nonsignificance

DETERMINATION OF NONSIGNIFICANCE
Edmonds School District Capital Facilities Plan 2022-2027

DESCRIPTION OF PROPOSAL: This threshold determination pertains to environmental impacts associated with the Edmonds School Board adoption of its Capital Facilities Plan 2022-2027 and its incorporation into the Snohomish County Growth Management Comprehensive Plan pursuant to the requirements of Snohomish County Code 30.66C. Following adoption of the updated Capital Facilities Plan, it is anticipated that it will also be incorporated by reference into the comprehensive plans of the cities of Lynnwood, Edmonds, Mountlake Terrace, Brier, and the Town of Woodway. Adoption of the Capital Facilities Plan does not involve actual construction of schools or other facilities. These will be reviewed in more detail at the time of their proposed construction.

PROPONENT: Edmonds School District No. 15

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

LEAD AGENCY: Edmonds School District No. 15

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

This DNS is issued under WAC 197-11-340(2). The lead agency will not act on this plan adoption proposal for 14 days from the date below. Comments may be submitted to the Responsible Official as named below. Board adoption is scheduled for August 9, 2022.

RESPONSIBLE OFFICIAL: Chris Cullison
POSITION/TITLE: Director of Budget & Finance
ADDRESS: Edmonds School District No. 15
20420 – 68th Avenue West
Lynnwood, WA 98036-7400
PHONE: 425-431-7334

PUBLISHED: The Everett Herald – July 25, 2022

There is no agency appeal.

DocuSigned by:

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Chris Cullison
Director of Budget & Finance

(Date) 7/21/2022

Appendix C

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.

EVERETT SCHOOL DISTRICT No. 2

CAPITAL FACILITIES PLAN

2022-27



Adopted: August 23, 2022

EVERETT SCHOOL DISTRICT NO. 2
RESOLUTION NO. 1281
Adoption of Capital Facilities Plan 2022-27

A Resolution of the Board of Directors (the "Board") of the Everett School District No. 2 (the "District") to adopt the Capital Facilities Plan 2022-27 (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, and August 2020 the Board approved Resolutions 700, 742, 799, 860, 907, 1004, 1046, 1095, 1132, 1138, 1180, and 1240 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 RCW 36.70A and RCW 82.02; and

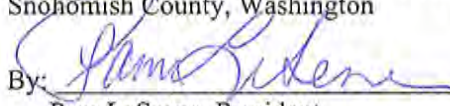
WHEREAS, the District conducted a review of the Plan in accordance with the State Environmental Policy Act, state regulations implementing the act, and District policies and procedures;

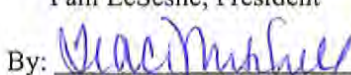
NOW, THEREFORE, BE IT RESOLVED:

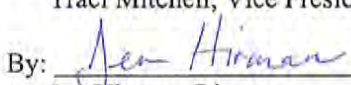
1. The Capital Facilities Plan 2022-27 is hereby adopted by the Board; and
2. The Snohomish County Council is hereby requested to adopt the Plan by reference as part of the capital facilities element of the County's General Policy Plan; and
3. The cities of Mill Creek and Everett are hereby requested to adopt the Plan by reference as part of the Capital Facilities Plan elements of their respective General Policy Plans.

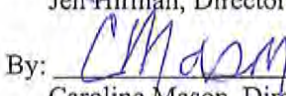
ADOPTED this 23rd day of August 2022 and authenticated by the signatures affixed below.

EVERETT SCHOOL DISTRICT NO. 2
Snohomish County, Washington

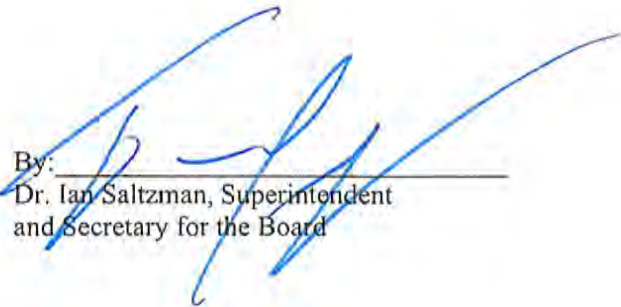
By: 
Pam LeSesne, President

By: 
Traci Mitchell, Vice President

By: 
Jen Hirman, Director

By: 
Caroline Mason, Director

By: _____
Andrew Nicholls, Director

By: 
Dr. Ian Saltzman, Superintendent
and Secretary for the Board

CAPITAL FACILITIES PLAN 2022-27 EVERETT SCHOOL DISTRICT No. 2

BOARD OF DIRECTORS

Pam LeSesne, President

Traci Mitchell, Vice President

Jen Hirman, Director

Caroline Mason, Director

Andrew Nicholls, Director

SUPERINTENDENT

Dr. Ian Saltzman



Adopted: August 23, 2022

For information on the Everett School District's Capital Facilities Plan, please contact Facilities and Planning, Everett School District No. 2, P.O. Box 2098, Everett WA 98213, Phone (425) 385-4190, email: facilitiesplanning@everettsd.org

EVERETT SCHOOL DISTRICT No. 2

CAPITAL FACILITIES PLAN

2022-27

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Section 1

Introduction

SECTION 1: INTRODUCTION

Purpose of the Capital Facilities Plan

The Washington Growth Management Act (GMA) outlines thirteen broad goals including adequate provision of necessary public facilities and services. Schools are among these necessary facilities and services. 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, 2022-2027.

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 2020 is estimated at 148,194 (Snohomish County GMA Population Forecast).

The district serves 19,620 students (October 2021 – OSPI Report 1049) in eighteen elementary schools, five middle schools, three comprehensive high schools, one alternative high school, one virtual academy (K-8), 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) finding space to implement new state initiatives, such as K-3 class size reduction (17:1 student to teacher ratio), Career-Ready & College-Ready Graduation Requirements (24 credits – additional fine arts and lab science), etc.; 2) the need to construct new facilities to meet student enrollment growth; 3) the need to upgrade older facilities so they can continue to serve students in the decades ahead; 4) the availability of real property appropriately sized for anticipated future school facilities' needs.

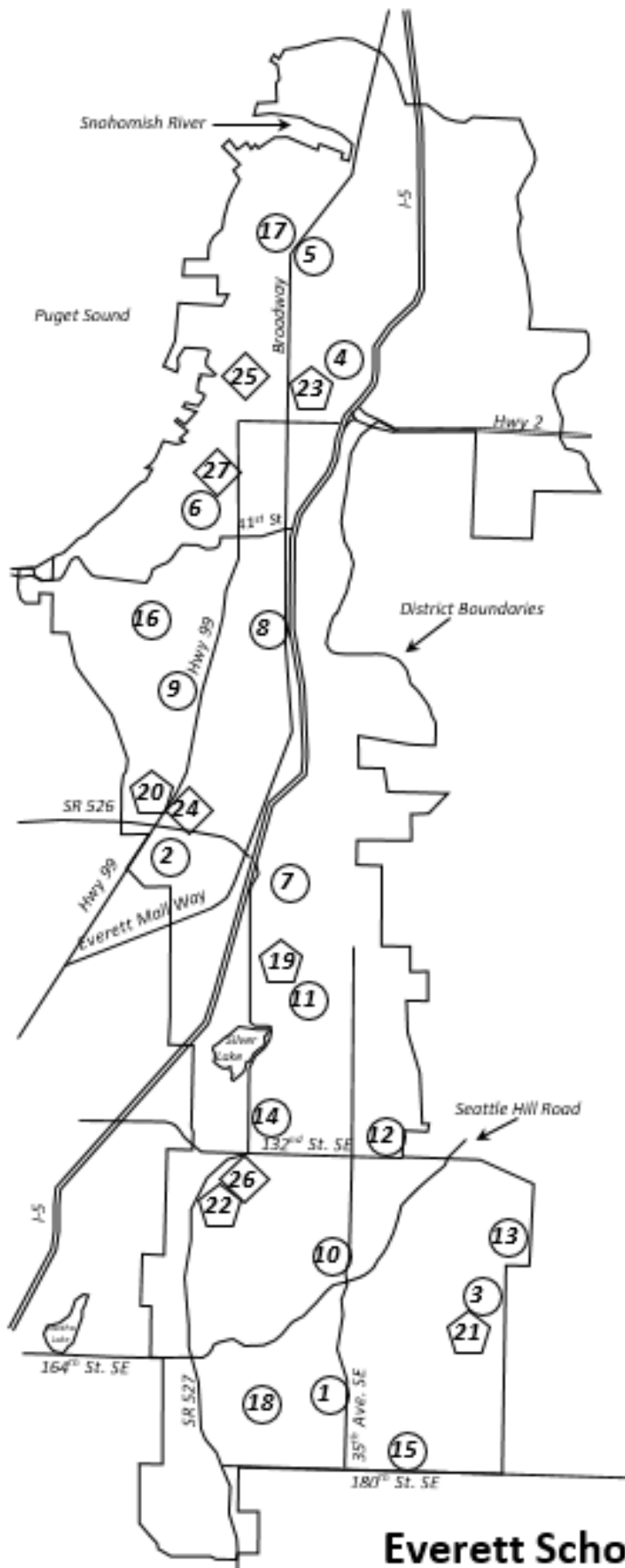


Figure 1
Map of School Facilities



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
 - Health and Human Services
 - Career Pathways
 - Business & Professional Services
 - Engineering & Advanced Manufacturing
 - Health Science & Medical Careers
 - Communication & Information Technology
 - Energy & Sustainability
 - Education Careers
 - Horticulture, Agriculture, and Floriculture
- Cares Room
- Contract Learning
- Counseling (career and mental health)
- Early Childhood Educational Assistance Program (ECEAP)
- Elementary Music (designated classroom)
- Family Resource Centers
- Health Education
- Health Services
- High school credit classes offered at middle schools
- Highly Capable Programs
- Intervention Programs
- Learning Assistance Programs
- Leadership and Activities
- Library Instruction
- Multilingual Programs (MLL)

- Online High School
- Partnerships
 - Lighthouse Cooperative
 - Parent-Teacher-Student Association (PTSA)
 - Port Gardner Parent Partnership
 - Mental Health providers
 - Natural Leaders
- Readiness to Learn Parent Centers
- Science Resource Center
- Special Education
 - Achieve (behavior support)
 - Deaf and Hard of Hearing Specialists
 - Developmental Kindergarten
 - Developmental Pre-School
 - Extended Resource Room
 - Life Skills
 - Occupational / Physical Therapy
 - 18-21 programs
 - GOAL – Gaining Ownership of Addult 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
- Virtual Academy
- Wireless Computer Carts

These specialized or nontraditional educational programs can have a significant impact on the student capacity of school facilities. Variations in student capacity between schools are often a result of the number of specialized programs offered at specific schools. These specialized programs require classroom space, which can reduce the permanent capacity of the buildings housing these programs. For example, some students leave their regular classroom for 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 modifications may reduce the overall classroom capacities of the building.

District educational program standards will undoubtedly change over time as a result of changes in the program year, specialized programs, class size, grade span configurations, use of new technology, and other physical aspects of the school facilities. The school capacity inventory will be reviewed periodically and adjusted for changes to the revised educational program standards.

Educational Program Standards - Elementary Schools

- School capacity is determined using the 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
- Students are provided music and technology instruction.
- At least one Special Education Resource Room is part of the curriculum.
- Design capacity for new schools:
 - 600 students
- Actual capacity of individual schools may vary depending on the educational programs offered and/or housed at a particular school.

Educational Program Standards – Middle Schools and High Schools

As a result of scheduling conflicts for student programs, the need for specialized rooms for specific programs, and the need for teachers to have a workspace during planning periods, it is not possible to achieve 100% utilization of teaching stations. Based on an analysis of 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 (MLL)

Middle School and/or High School

- Students are also provided educational opportunities such as:
 - Art Labs
 - Auto Shop (high school only)
 - Career & Technical Education (CTE)
 - Challenge and Advanced Placement Program
 - Dual Credit Programs – College in the High School
 - Drama rooms (high school only)
 - Health and Fitness
 - Marketing (high school only)
 - Music rooms – Band, Orchestra, Strings, Jazz Band, Choir
 - Navy Junior Reserve Officer Training Corps (high school only)
 - Technology Labs
 - Science / STEM Labs
- Design capacity for new schools:
 - Middle schools = 825 students
 - High schools = 1,500 students
- Actual capacity of individual schools may vary depending on the educational programs offered and/or housed at a particular school.

Minimum Levels of Service

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

- **Class Size Goals**
 - 24 Kindergarten
 - 25 Grades 1-3 General Education
 - 26 Grade 4 General Education
 - 27 Grade 5 General Education
 - 29 Grades 6-8 General Education
 - 30 Grades 9-12 General Education
- **2021 Actual Class Size Average - based on the October 1, 2021 count of student enrollment**
 - 20.0 Kindergarten
 - 20.6 Grades 1-3 General Education
 - 24.2 Grades 4-5 General Education
 - 24.1 Grades 6-8 General Education
 - 24.5 Grades 9-12 General Education

School Boundary Changes

The Everett School District recognizes that school boundaries need to be modified occasionally to respond to changes in student enrollment and/or educational programs. Boundary changes can be an effective method of reducing the need for new school construction and are also necessary when new schools or classroom additions are built.

A good example of changing school boundaries to reduce the need for additional classroom space 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 will be phased in over four years through 2023.

Trends in Programs, with Potential Impacts on district facilities

- Aerospace & Advanced Manufacturing Pathway
- Medical & Health Pathway
- Information & Communication Pathway
- STEM (Science, Technology, Engineering, and Mathematics), CTE (Career and Technical Education), and AP (Advanced Placement) program growth
- Flexible space for multiple uses – “maker” spaces, robotics, project-based learning, etc.
- Extended learning opportunities – after-school and/or summer activities
- Expansion of high school credit class offerings at middle schools (science, languages, etc.)
- 1:1 technology for students
- Early learning programs - Birth to 3 years and 3 to 5 years
- Industry pathway partnerships
- Post high school support opportunities
- Technology accessibility for community
- Support for strategic partners whose work is aligned with the district’s student learning mission
- Centralized storage and staging facilities for assessment, curriculum and textbooks, and STEM materials
- Expanded course offerings - Orchestra (strings), etc.
- 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 as a way 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 4 to 55 years. The portables capacity inventory is summarized in Table 2.

For this CFP, the costs of portable relocations have not been included in the formula for determining developer impact fees.

Support Facilities

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

Undeveloped Land

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

- 35th Street & Grand Avenue
 - 1.38 acres
 - Long-term lease with the City of Everett - Doyle Park
- 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	2021 Permanent Student Capacity (2)	Teaching Stations Not Generating Capacity (3)
Elementary Schools						
Cedar Wood	14.40	55,454	20	2	440	5
Emerson	8.05	52,796	22	2	434	3
Forest View	15.30	66,629	23	1	489	4
Garfield	5.60	52,744	21	2	485	1
Hawthorne	8.84	72,395	24	4	517	5
Jackson	5.16	51,652	15	1	329	3
Jefferson (4)	18.81	55,154	19	3	443	2
Lowell	9.34	58,690	20	3	441	1
Madison	9.64	58,063	19	3	420	4
Mill Creek	9.69	55,646	23	2	536	1
Monroe	9.15	69,463	20	4	450	4
Penny Creek	13.90	64,882	29	0	624	2
Silver Firs	12.02	55,839	21	3	444	2
Silver Lake	11.09	56,774	20	2	440	3
Tambark Creek	18.64	83,665	29	1	598	3
View Ridge	9.47	66,154	24	2	554	2
Whittier	5.20	54,084	20	1	446	1
Woodside	10.84	55,587	21	1	430	2
Totals:	195.14	1,085,671	390	37	8,520	48
Middle Schools						
Eisenhower	19.67	107,252	34	5	913	
Evergreen	21.74	116,526	41	4	1,017	
Gateway	43.70	110,181	37	4	955	
Heatherwood	29.21	117,051	34	3	862	
North	10.66	101,770	34	6	887	0
Totals:	124.98	552,780	180	22	4,634	0
High Schools						
Cascade	38.85	244,345	70	11	1,849	0
Everett	11.12	280,459	74	11	1,973	
Jackson	42.79	247,043	69	11	1,840	
Sequoia (5)	3.02	67,007	17	1	432	
Totals:	95.78	838,854	230	34	6,094	0
	415.90	2,477,305				

Updated: 4/27/2022

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: care rooms, 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	2019 Portable Student Capacity (1)	Teaching Stations Not Generating Capacity (2)
Elementary Schools				
Cedar Wood	12		275	
Emerson	9		216	
Forest View	5		106	
Garfield	1		24	
Hawthorne	1		24	
Jackson	3	1	82	
Jefferson	4		96	
Lowell	5		85	3
Madison	1		24	
Mill Creek	7		123	
Monroe	4		96	
Penny Creek	4		96	
Silver Firs	3		72	
Silver Lake	8		192	2
Tambark Creek	3		72	
View Ridge	2		41	
Whittier				3
Woodside	9		206	1
Totals:	81	1	1,830	9
Middle Schools				
Eisenhower	7		156	
Evergreen	5	2	144	
Gateway	3		72	
Heatherwood	13		288	
North	0		0	
Totals:	28	2	660	0
High Schools				
Cascade	2		36	
Everett			0	
Jackson	15		360	
Sequoia			0	
Totals:	17	0	396	0

Updated: 4/27/2022

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: 4/27/2022

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 district's enrollment felt the effect of the economic recession. The district's enrollment declined through 2012. Between 2012 and 2019 the district's enrollment has increased each year. Due to COVID-19 related issues, district enrollment decreased in 2020, with a slight increase in 2021. Districtwide enrollment is projected to increase through 2031. Enrollment projections from 2032 to 2044 are linked directly to OFM population forecasts and show a steady increase as well.

2022-2027 Enrollment Projections

This CFP has been prepared using enrollment projections, for 2022 through 2027, 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 628 students over the next six years, reflecting an increase of approximately 3.20% over the 2021 enrollment levels. Table 6 provides a breakdown of the Kendrick enrollment projections by grade level span for every year from 2022 to 2027.

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 2012-21 & Projections 2022-27

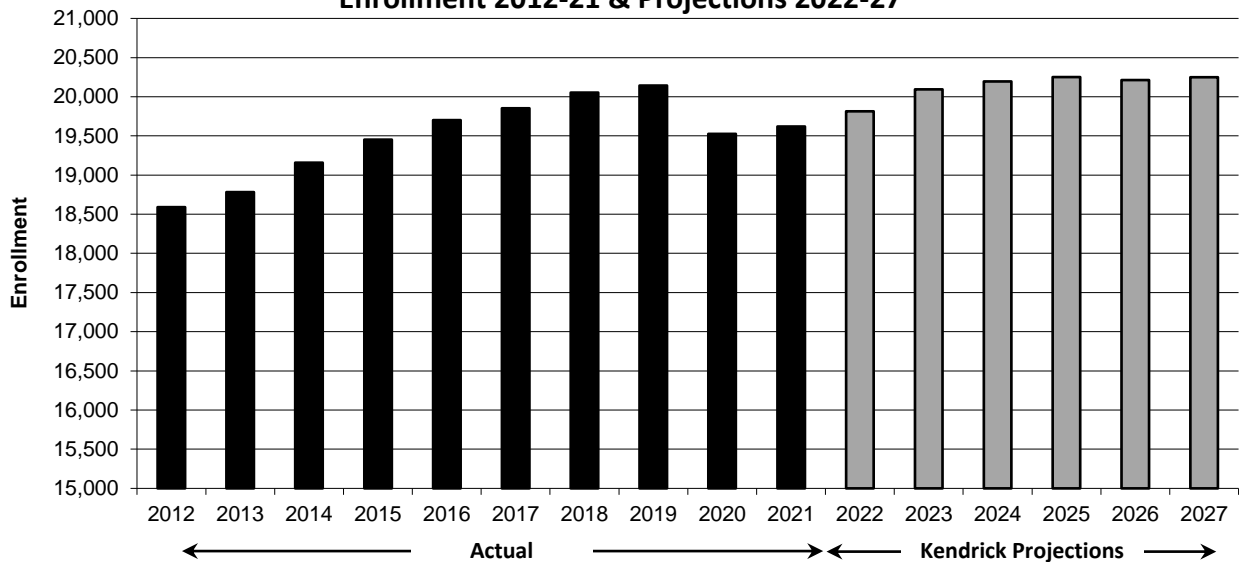


Table 5
Comparison of Enrollment Projections 2022-27

	<i>Actual*</i>							Projected Total Change	Projected Percent Change
	2021	2022	2023	2024	2025	2026	2027	2021-27	2021-27
Kendrick	19,620	19,814	20,095	20,195	20,251	20,213	20,248	628	3.20%
OFM	19,620	19,673	19,756	19,828	19,891	19,977	19,987	367	1.87%
OSPI	19,620	19,523	19,446	19,347	19,258	19,054	18,891	(729)	-3.72%

* Actual enrolment from OSPI Form 1049

Table 6
OSPI Actual 2021 Enrollment & Kendrick Medium-Range Projections 2022-27

	<i>Actual*</i>							Projected Total Change	Projected Percent Change
	2021	2022	2023	2024	2025	2026	2027	2021-27	2021-27
Elementary	9,437	9,635	9,867	9,859	9,803	9,802	9,747	310	3.28%
Middle	4,640	4,533	4,518	4,701	4,780	4,806	4,832	192	4.14%
High	5,543	5,646	5,710	5,635	5,668	5,605	5,669	126	2.27%
Total:	19,620	19,814	20,095	20,195	20,251	20,213	20,248	628	3.20%

* Actual enrolment 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 2021-2027 & 2044

Elementary School	2021	2022	2023	2024	2025	2026	2027	2044
Enrollment	9,437	9,635	9,867	9,859	9,803	9,802	9,747	11,350
Capacity Change Due to Construction Projects		0	0	0	220	0	0	2,610
Total Capacity (after construction projects)	8,520	8,520	8,520	8,520	8,740	8,740	8,740	11,350
Amount of Enrollment Above or (Below) Capacity	917	1,115	1,347	1,339	1,063	1,062	1,007	0

Growth Related Capacity Need 430 / 1,347 = 31.92%

Middle School	2021	2022	2023	2024	2025	2026	2027	2044
Enrollment	4,640	4,533	4,518	4,701	4,780	4,806	4,832	5,627
Capacity Change Due to Construction Projects		0	0	0	0	0	0	993
Total Capacity (after construction projects)	4,634	4,634	4,634	4,634	4,634	4,634	4,634	5,627
Amount of Enrollment Above or (Below) Capacity	6	-101	-116	67	146	172	198	0

Growth Related Capacity Need 192 / 198 = 96.97%

High School	2021	2022	2023	2024	2025	2026	2027	2044
Enrollment	5,543	5,646	5,710	5,635	5,668	5,605	5,669	6,601
Capacity Change Due to Construction Projects		0	0	0	0	0	0	507
Total Capacity (after construction projects)	6,094	6,094	6,094	6,094	6,094	6,094	6,094	6,601
Amount of Enrollment Above or (Below) Capacity	-551	-448	-384	-459	-426	-489	-425	0

Growth Related Capacity Need 0 / 0 = 0.00%

Section 5

Capital Facilities Plan

SECTION 5: CAPITAL FACILITIES PLAN

Facilities Needs 2022-27

Elementary School

There are currently existing permanent capacity deficiencies at the elementary school level. As of 2021, the district elementary enrollment was 917 students over the permanent building capacity. These students are housed in ninety-three (93) portable classrooms. Twelve of the district's eighteen elementary schools are currently over their permanent building capacity. By 2027, the district is projected to grow by an additional 310 elementary students. In 2023, the district is projected to have the highest elementary enrollment at 9,867, a growth of 430 students. The plan to address these needs is through the construction of additional classroom space, and the purchase and/or relocation of portables. The plan, as detailed in the CFP, is to construct 10 additional classrooms with a capacity of 220.

Middle School

There are existing permanent capacity deficiencies at the middle school level. As of 2021, the district middle school enrollment was six (6) students over the permanent building capacity. These students are housed in thirty (30) portable classrooms. Only one of the district's five middle schools is over the permanent building capacity. Middle school enrollment is projected to continue to grow through 2027, with a growth of 192 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 existing permanent capacity deficiencies. Nonetheless, one of the district's three high schools is currently 228 students over the permanent building capacity. By 2027, the high school enrollment is projected to grow by an additional 126 students. At that time, two of the district's three high schools are projected to be over permanent building capacity. The district is projected to have the highest high school enrollment in 2023 with 5,710 students, a growth of 167 students. The plan to address part of these needs is through a phased-in modified attendance boundary adjustment (2020-2023) and the purchase and placement and/or relocation of portables at the affected schools. The plan, as detailed in the CFP, does not include the construction of any new classroom space.

District-wide

Enrollment

The district-wide enrollment is projected to gradually increase each year from 2021 to 2025, and then level off through 2027. During this same period, the anticipated enrollment levels will continue to exceed the 2021 capacities at the elementary and middle school levels. The increase in enrollment can be seen in all areas of the district. Enrollment and capacity projections are presented together for comparison purposes in Table 8 – *Permanent Facility Capacity Calculations 2021-2027 & 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)

Busing

Due to the impacts, difficulties, and high cost of transporting students over long distances, the district believes busing students long distances from the south end of the district to the north end is not the most appropriate method of addressing all the expected south-end growth.

Planned Improvements Adding Student Capacity

The following is an outline of the projects that add capacity and are considered necessary to accommodate the students forecasted in the Kendrick enrollment projections for the district through 2027. Timelines for these projects can be found in Table 9 – *Capital Facilities Plan*.

Elementary Schools

District-wide elementary school enrollment is projected to reach 9,747 in 2027 as shown in Table 8, an increase of 310 students from the 2021 enrollment of 9,437. This is 1,227 more students than the existing 2021 elementary school capacity of 8,520. In response to this increase in enrollment, 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 (estimated costs between 2022-2027): Jackson ES – 10 classrooms (\$10,852,000); Madison ES – 4 classrooms (\$2,692,000)*. (*anticipated project completion - Fall 2028)
Total estimate - \$13,544,000
- 2) Portable classrooms (7) will need to be relocated or purchased to provide enough classroom space at individual schools.

Total estimate - \$1,825,000

The estimated cost of elementary school permanent facility improvements is: \$13,544,000

Middle Schools

District-wide middle school enrollment is projected to increase to its highest level of 4,832 in 2027. The existing 2021 middle school capacity of 4,634 will not be adequate to accommodate the projected enrollment. To provide for the enrollment increases at individual schools, portable classrooms (8) will need to be purchased or relocated to provide sufficient classroom space while avoiding additional permanent facility construction expenses. No other projects adding capacity are planned through 2027. Total estimate - \$1,825,000

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

High Schools

District-wide high school enrollment is projected to increase to its highest level of 5,710 in 2023. At that point, only one of the district's three high schools is projected to be over their permanent building capacity. The plan to address the needs, between 2022 and 2027, is through the continuation of a modified attendance boundary adjustment and the purchase or relocation of portables at the affected schools. As enrollment increases at individual schools, portable classrooms (6) will need to be purchased or relocated to provide enough classroom space. Total estimate - \$1,050,000

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

Future School Site Properties

180th Street SE

In 2007 the district purchased property on 180th St. SE as a future site for two schools. The construction of the first school, Tambark Creek ES, 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. This practice will continue until the retirement of the current credit balance of \$79,750.

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: \$5,000,000

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 2027. Timelines for these projects can be found in Table 9 – *Capital Facilities Plan*.

Elementary Schools

- Jackson Elementary School - new in lieu of modernization
- Madison Elementary School - new in lieu of modernization

The cost of these improvements is estimated at: \$73,808,000

Middle Schools

- Nothing planned

The cost to complete this improvement is estimated at: \$0

High Schools

- Cascade High School - Science Building - new in lieu of modernization
- Cascade High School - Cafeteria and kitchen upgrades
- Cascade High School - Bleacher 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: \$32,797,000

Safety and Security Projects & ADA Upgrades

- Upgrades to building access and controls, fire alarms, site security, and ADA upgrades

The cost of these improvements is estimated at: \$7,458,000

Clean Buildings Act

- Upgrades to building to meet the requirements of the Clean Building Act – HVAC, roofing, and flooring systems

The cost of these improvements is estimated at: \$48,490,000

Technology Projectors and infrastructure (included in 2016 Bond & Levy)

- Classroom devices, related infrastructure, support, training, professional development

The cost of these improvements is estimated at: \$17,432,000

Technology Infrastructure & Upgrades

- WIFI-mobile devices, multi-media classroom display systems, security cameras, network/data security, cybersecurity systems, data center systems, WIFI
- 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: \$73,381,000

Other School Projects

- District-wide upgrades to heating, ventilation, and air conditioning systems, exterior and interior finishes, roofing, electrical, site work, freezer & cooler replacement (3 schools), and other miscellaneous systems upgrades

The cost of these improvements is estimated at: \$9,089,000

Other Projects

- Replace playground equipment – 8 schools
- Replace Readerboards – 19 schools
- Memorial Stadium - replace synthetic turf and track; Baseball stadium upgrades
- South satellite bus facility

The cost of these improvements is estimated at: \$16,621,000

Facilities Needs 2027-2044

Planned Improvements

To house the district-wide projected enrollment (OFM) from 2027 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 2027 to 2044 the district anticipates the need for the following facilities:

- Elementary school level
 - 119 Classrooms / 2,610 capacity
 - Equivalent to four (4) new schools and additions to existing schools
- Middle school level
 - 41 Classrooms / 993 capacity
 - Equivalent to one (1) new school and additions to existing schools
- High school level
 - 21 Classrooms / 507 capacity

Table 9
Capital Facilities Plan

	Estimated Project Cost by Year - in \$ Millions					Total Cost	Secured Bond/Levy ¹	Secured Other ²	Unsecured Other ³
	2022	2023	2024	2025	2026					2027
Improvements Adding Student Capacity									
Elementary School									
Jackson ES - Part of new in lieu of modernization project - 10 CR	\$0.050	\$0.100	\$4.700	\$6.002			\$10.852		
Madison ES - Part of new in lieu of modernization project - 4 CR				\$0.861	\$1.831		\$2.692		
Portable Relocations / Purchase ⁴	\$0.175	\$0.500	\$0.175	\$0.325	\$0.325		\$1.825	\$0.825	
Middle School									
Portable Relocations / Purchase ⁴		\$0.175	\$0.650	\$0.650	\$0.175		\$1.825	\$1.825	
High School									
Portable Relocations / Purchase ⁴	\$0.175	\$0.175	\$0.175	\$0.175	\$0.175		\$1.050	\$0.050	
Subtotal	\$0.400	\$0.950	\$5.700	\$7.152	\$1.536	\$2.506	\$18.244	\$15.544	\$2.700
Property Adding Student Capacity									
180th Street SE Site ⁴	0.080						\$0.080	0.080	
Purchase property for future elementary school		\$5.000					\$5.000		
Subtotal	\$0.080	\$5.000					\$5.080	\$0.080	
Improvements Not Adding Student Capacity									
Local Projects - Sitework, finishes, Mechanical, Electrical	\$1.775	\$1.900	\$1.125	\$1.150	\$1.050	\$1.100	\$8.100		
Freezer & Cooler replacement - 3 schools	\$0.010	\$0.385	\$0.594				\$0.989		
ADA Upgrades	\$0.045	\$0.115	\$0.220	\$0.240	\$0.240	\$0.200	\$1.060		
Jackson ES - New in lieu of modernization project	\$0.175	\$0.350	\$16.450	\$21.011			\$37.986		
Madison ES - New in lieu of modernization project				\$0.063	\$11.439	\$24.320	\$35.822		
Cascade HS - Science building new in lieu of modernization				\$0.600	\$0.600	\$0.600	\$0.600		
Everett HS - Cafeteria & classroom modernization			\$0.150	\$0.600	\$12.300	\$16.652	\$29.702		
HM Jackson HS - STEM classroom upgrades		\$0.610					\$0.610		
Cascade HS - Cafeteria & kitchen upgrade					\$0.525		\$0.525		\$8.336
Everett Memorial Stadium - Baseball Stadium upgrades	\$0.486	\$5.650	\$2.200				\$8.336		
Safety and security upgrades / Fire Alarm systems upgrades / DAS systems	\$0.925	\$1.767	\$0.585	\$1.801	\$0.820	\$0.500	\$6.398		
Bleacher Replacement - 2 schools - HM Jackson HS & Cascade HS			\$1.360				\$1.360		
Replace playground equipment - 8 schools		\$0.283	\$0.283	\$0.283	\$0.283	\$0.566	\$1.698		
Memorial stadium - replace synthetic turf and track		\$2.564					\$2.564		
Readerboards - 19 Schools		\$0.463	\$0.463	\$0.463	\$0.463	\$0.371	\$2.223		
South satellite bus facility					\$0.900	\$0.900	\$1.800		
Clean Building Act - Upgrade HVAC/Roofing/Floor systems	\$2.154	\$6.358	\$13.212	\$8.113	\$16.178	\$2.475	\$48.490		
Technology Projectors and infrastructure - 2016 Bond	\$2.400						\$2.400		
Technology Projects - 2016 levy	\$8.423	\$6.609					\$15.032		
District-wide technology infrastructure & upgrades		\$7.846	\$14.739	\$16.481	\$16.778	\$17.538	\$73.381		
Subtotal	\$16.393	\$34.900	\$51.381	\$50.205	\$60.451	\$65.747	\$279.076	\$270.740	\$8.336
Total	\$16.873	\$40.850	\$57.081	\$57.357	\$61.987	\$68.253	\$302.400	\$291.284	\$8.336

Source: Everett School District
Updated: 3/29/2022

Source: Everett School District

1. Secured Bond/Levy - bond and levy funding already approved by voters
2. Secured Other - funds currently available to the District including proceeds from property sales, school mitigation and impact fees, state funding assistance from prior construction projects, and impact/mitigation fee credits from the 2007 purchase of the 30-acre property on 180th Street SE
3. Unsecured future - school mitigation and impact fees not yet collected, bonds and levies not yet approved, grants, donations, and other miscellaneous sources
4. Costs are not included in the calculations of the impact fees

Updated: 3/29/2022

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 2022 through 2027. 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 2022 state funding assistance percentages, for recognized project costs, range from a minimum of 19.47% to a maximum of 95.46%. The district's current state funding assistance percentage is: 55.05%.

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 state has determined that the Everett School District has excess student capacity, and, therefore, is not currently eligible for state funding assistance on projects that provide increased student capacity. The district remains eligible for state funding assistance for modernization 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, 2022, the CCA has been adjusted to \$246.83 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	0.301	0.088	0.069	0.458
Multiple Family, 0-1 BR	0.011	.000	.000	0.011
Multiple Family, 2+ BR*	0.173	0.094	0.087	0.354

* Includes duplexes, condominiums, and townhouses

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

Impact Fee Schedule

Table 11
Calculated Impact Fees
Everett School District

Housing Type	Impact Fee Per Unit
Single Family	\$12,572
Multiple Family, 0-1 BR	\$0
Multiple Family, 2+ BR	\$7,668
Duplexes and Townhouses	\$7,668

School Impact Fees with 50% discount
Everett School District

Housing Type	Impact Fee Per Unit
Single Family	\$6,286
Multiple Family, 0-1 BR	\$0
Multiple Family, 2+ BR	\$3,834
Duplexes and Townhouses	\$3,834

Table 12
Impact Fee Variables
Everett School District

Criteria	Elementary	Middle	High
Site Acquisition Cost Element			
Site Size (acres)	11		
Growth Related (2022-27)			
Average Land Cost Per Acre	\$267,858		
Growth Related (2022-27)	\$85,500		
Total Land Cost	\$2,946,435		
Growth Related (2022-27)	\$940,502		
Additional Land Capacity	600		
Growth Related (2022-27)	192		
Student Factor			
Single Family	0.301	0.088	0.069
Multiple Family 0-1 Bedroom	0.011	.000	0.000
Multiple Family 2+ Bedrooms	0.173	0.094	0.087
	Ten (10)		
School Construction Cost Element	Additional Classrooms		
Additional Building Capacity	220	0	0
Growth Related (2022-27)	70	0	0
Current Facility Square Footage	1,085,671	552,780	838,854
Estimated Facility Construction Cost	\$13,544,000	\$0	\$0
Growth Related (2022-27)	\$4,323,245	\$0	\$0
State Financing Assistance Credit*			
Construction Cost Allotment -- July 2022	\$246.83	\$246.83	\$246.83
School Space per Student (OSPI)	90	117	130
State Financing Assistance Percentage	55.05%	55.05%	55.05%
Tax Payment Credit			
Interest Rate	2.45%	2.45%	2.45%
Loan Payoff (Years)	10	10	10
Levy Rate	0.001327	0.001327	0.001327
Average Assessed Value	\$567,005 (Single Family)	\$203,899 (MF 0-1 bdrm)	\$287,840 (MF 2+ bdrm)
Growth-Related Capacity Need			
Permanent Facilities	31.92%	96.97%	0.00%
Discount	50%	50%	50%

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

Appendix A

Impact Fee Calculations

IMPACT FEE WORKSHEET
EVERETT SCHOOL DISTRICT
SINGLE-FAMILY RESIDENTIAL

SITE ACQUISITION COST

acres needed	<u>11.00</u>	x	cost per acre	<u>\$85,500</u>	/	capacity (# students)	<u>192</u>	x	student factor	<u>0.301</u>	=	<u>\$1,474</u>	(elementary)
acres needed	<u>0.00</u>	x	cost per acre	<u>\$0</u>	/	capacity (# students)	<u>0</u>	x	student factor	<u>0.088</u>	=	<u>\$0</u>	(middle school)
acres needed	<u>0.00</u>	x	cost per acre	<u>\$0</u>	/	capacity (# students)	<u>0</u>	x	student factor	<u>0.069</u>	=	<u>\$0</u>	(high school)
TOTAL SITE ACQUISITION COST											=	<u>\$1,474</u>	

SCHOOL CONSTRUCTION COST

total const. cost	<u>\$4,323,245</u>	/	capacity (# students)	<u>70</u>	x	student factor	<u>0.301</u>	=	<u>\$18,590</u>	(elementary)	
total const. cost	<u>\$0</u>	/	capacity (# students)	<u>0</u>	x	student factor	<u>0.088</u>	=	<u>\$0</u>	(middle school)	
total const. cost	<u>\$0</u>	/	capacity (# students)	<u>0</u>	x	student factor	<u>0.069</u>	=	<u>\$0</u>	(high school)	
							Subtotal		<u>\$18,590</u>		
Total Square Feet of Permanent Space (District)	<u>2,477,305</u>	/ Total Square Feet of School Facilities	<u>2,601,905</u>						=	<u>95.21%</u>	
TOTAL FACILITY CONSTRUCTION COST								=	<u>\$17,700</u>		

STATE FINANCING ASSISTANCE CREDIT

Const. Cost Allocation	<u>\$246.83</u>	x	OSPI Allowance	<u>90</u>	x	State Financing Assistance %	<u>0.00%</u>	x	student factor	<u>0.301</u>	=	<u>\$0</u>	(elementary)
Const. Cost Allocation	<u>\$246.83</u>	x	OSPI Allowance	<u>117</u>	x	State Financing Assistance %	<u>0.00%</u>	x	student factor	<u>0.088</u>	=	<u>\$0</u>	(middle school)
Const. Cost Allocation	<u>\$246.83</u>	x	OSPI Allowance	<u>130</u>	x	State Financing Assistance %	<u>0.00%</u>	x	student factor	<u>0.069</u>	=	<u>\$0</u>	(high school)
TOTAL STATE MATCH CREDIT											=	<u>\$0</u>	

TAX PAYMENT CREDIT

(((1+ interest rate	<u>2.45%</u>	) ^	<u>10</u>	years to pay off bond) - 1]	/	[interest rate	<u>2.45%</u>	x					
(1 + interest rate	<u>2.45%</u>	) ^	<u>10</u>	years to pay off bond]	x	<u>0.001327</u>	Property tax levy rate	x					
assessed value	<u>\$567,005</u>												
											=	<u>\$6,602</u>	(tax payment credit)

IMPACT FEE CALCULATION

SITE ACQUISITION COST	<u>\$1,474</u>
FACILITY CONSTRUCTION COST	<u>\$17,700</u>
RELOCATABLE FACILITIES COST (PORTABLES)	<u>\$0</u>
(LESS STATE FINANCING ASSISTANCE CREDIT)	<u>\$0</u>
(LESS TAX PAYMENT CREDIT)	<u>(\$6,602)</u>
(LESS COUNTY DISCOUNT)	<u>(\$6,286)</u>
(LESS ELECTIVE DISTRICT DISCOUNT)	<u>\$0</u>

FINAL IMPACT FEE PER UNIT

\$6,286

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

SITE ACQUISITION COST

acres needed	<u>11.00</u>	x	cost per acre	<u>\$85,500</u>	/	capacity (# students)	<u>192</u>	x	student factor	<u>0.011</u>	=	<u>\$54</u>	(elementary)
acres needed	<u>0.00</u>	x	cost per acre	<u>\$0</u>	/	capacity (# students)	<u>0</u>	x	student factor	<u>.000</u>	=	<u>\$0</u>	(middle school)
acres needed	<u>0.00</u>	x	cost per acre	<u>\$0</u>	/	capacity (# students)	<u>0</u>	x	student factor	<u>.000</u>	=	<u>\$0</u>	(high school)
TOTAL SITE ACQUISITION COST											=	<u>\$54</u>	

SCHOOL CONSTRUCTION COST

total const. cost	<u>\$4,323,245</u>	/	capacity (# students)	<u>70</u>	x	student factor	<u>0.011</u>	=	<u>\$679</u>	(elementary)
total const. cost	<u>\$0</u>	/	capacity (# students)	<u>0</u>	x	student factor	<u>.000</u>	=	<u>\$0</u>	(middle school)
total const. cost	<u>\$0</u>	/	capacity (# students)	<u>0</u>	x	student factor	<u>.000</u>	=	<u>\$0</u>	(high school)
							Subtotal		<u>\$679</u>	
Total Square Feet of Permanent Space (District)	<u>2,477,305</u>	/ Total Square Feet of School Facilities	<u>2,601,905</u>			=	95.21%			
TOTAL FACILITY CONSTRUCTION COST							=	<u>\$646</u>		

STATE FINANCING ASSISTANCE CREDIT

Const. Cost Allocation	<u>\$246.83</u>	x OSPI Allowance	<u>90</u>	x	State Financing Assistance %	<u>0.00%</u>	x	student factor	<u>0.011</u>	=	<u>\$0</u>	(elementary)
Const. Cost Allocation	<u>\$246.83</u>	x OSPI Allowance	<u>117</u>	x	State Financing Assistance %	<u>0.00%</u>	x	student factor	<u>.000</u>	=	<u>\$0</u>	(middle school)
Const. Cost Allocation	<u>\$246.83</u>	x OSPI Allowance	<u>130</u>	x	State Financing Assistance %	<u>0.00%</u>	x	student factor	<u>.000</u>	=	<u>\$0</u>	(high school)
TOTAL STATE MATCH CREDIT										=	<u>\$0</u>	

TAX PAYMENT CREDIT

(((1+ interest rate	<u>2.45%</u>	) ^	<u>10</u>	years to pay off bond) - 1) /	[interest rate	<u>2.45%</u>	x							
(1 + interest rate	<u>2.45%</u>	) ^	<u>10</u>	years to pay off bond] x	<u>0.001327</u>	Property tax levy rate x								
assessed value	<u>\$203,899</u>												=	<u>\$2,374</u>	(tax payment credit)

IMPACT FEE CALCULATION

SITE ACQUISITION COST	<u>\$54</u>
FACILITY CONSTRUCTION COST	<u>\$646</u>
RELOCATABLE FACILITIES COST (PORTABLES)	<u>\$0</u>
(LESS STATE FINANCING ASSISTANCE CREDIT)	<u>\$0</u>
(LESS TAX PAYMENT CREDIT)	<u>(\$2,374)</u>
(LESS COUNTY DISCOUNT)	<u>\$0</u>
(LESS ELECTIVE DISTRICT DISCOUNT)	<u>\$0</u>

FINAL IMPACT FEE PER UNIT

\$0

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

SITE ACQUISITION COST

acres needed	<u>11.00</u>	x	cost per acre	<u>\$85,500</u>	/	capacity (# students)	<u>192</u>	x	student factor	<u>0.173</u>	=	<u>\$847</u>	(elementary)
acres needed	<u>0.00</u>	x	cost per acre	<u>\$0</u>	/	capacity (# students)	<u>0</u>	x	student factor	<u>0.094</u>	=	<u>\$0</u>	(middle school)
acres needed	<u>0.00</u>	x	cost per acre	<u>\$0</u>	/	capacity (# students)	<u>0</u>	x	student factor	<u>0.087</u>	=	<u>\$0</u>	(high school)
TOTAL SITE ACQUISITION COST											=	<u>\$847</u>	

SCHOOL CONSTRUCTION COST

total const. cost	<u>\$4,323,245</u>	/	capacity (# students)	<u>70</u>	x	student factor	<u>0.173</u>	=	<u>\$10,685</u>	(elementary)
total const. cost	<u>\$0</u>	/	capacity (# students)	<u>0</u>	x	student factor	<u>0.094</u>	=	<u>\$0</u>	(middle school)
total const. cost	<u>\$0</u>	/	capacity (# students)	<u>0</u>	x	student factor	<u>0.087</u>	=	<u>\$0</u>	(high school)
							Subtotal		<u>\$10,685</u>	
Total Square Feet of Permanent Space (District)	<u>2,477,305</u>	/	Total Square Feet of School Facilities	<u>2,601,905</u>				=	<u>95.21%</u>	
TOTAL FACILITY CONSTRUCTION COST								=	<u>\$10,173</u>	

STATE FINANCING ASSISTANCE CREDIT

Const. Cost Allocation	<u>\$246.83</u>	x	OSPI Allowance	<u>90</u>	x	State Financing Assistance %	<u>0.00%</u>	x	student factor	<u>0.173</u>	=	<u>\$0</u>	(elementary)
Const. Cost Allocation	<u>\$246.83</u>	x	OSPI Allowance	<u>117</u>	x	State Financing Assistance %	<u>0.00%</u>	x	student factor	<u>0.094</u>	=	<u>\$0</u>	(middle school)
Const. Cost Allocation	<u>\$246.83</u>	x	OSPI Allowance	<u>130</u>	x	State Financing Assistance %	<u>0.00%</u>	x	student factor	<u>0.087</u>	=	<u>\$0</u>	(high school)
TOTAL STATE MATCH CREDIT											=	<u>\$0</u>	

TAX PAYMENT CREDIT

(((1+ interest rate	<u>2.45%</u>	) ^	<u>10</u>	years to pay off bond) - 1	/	[interest rate	<u>2.45%</u>	x					
(1 + interest rate	<u>2.45%</u>	) ^	<u>10</u>	years to pay off bond]	x	<u>0.001327</u>	Property tax levy rate	x					
assessed value	<u>\$287,840</u>								=	<u>\$3,352</u>	(tax payment credit)		

IMPACT FEE CALCULATION

SITE ACQUISITION COST	<u>\$847</u>
FACILITY CONSTRUCTION COST	<u>\$10,173</u>
RELOCATABLE FACILITIES COST (PORTABLES)	<u>\$0</u>
(LESS STATE FINANCING ASSISTANCE CREDIT)	<u>\$0</u>
(LESS TAX PAYMENT CREDIT)	<u>(\$3,352)</u>
(LESS COUNTY DISCOUNT)	<u>(\$3,834)</u>
(LESS ELECTIVE DISTRICT DISCOUNT)	<u>\$0</u>

FINAL IMPACT FEE PER UNIT

\$3,834

Appendix B

Student Generation Rate Study



MEMORANDUM

To: Charles Booth
Facilities & Planning Specialist
Everett School District

Date: March 31, 2022

From: Tyler Vick
Managing Director

Benjamin Maloney
Demographer/Data Analyst

Project No.: F2253.01.001

Re: Student Generation Report— Everett School District

At the request of the Everett Public Schools (District/EPS), FLO Analytics (FLO) has prepared an analysis of the student generation rates (SGRs) as a result of recent single-family (2014–2021) and multifamily (2017–2021) construction within the district. This document details the methodology FLO used to create the SGRs for EPS; 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 2014 to December 2021 residential developments from the Snohomish County Assessor's Office (SCAO) and (2) March 2022 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 two residential construction developments that were erroneously listed as having been completed between 2017 and 2021. These consisted of two 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 2,757 SF units and 27 MF buildings completed between 2014 and 2021 (SF) and the period between 2017 and 2021 (MF). While the majority of the SF construction consisted of units classified as "Single Family Residence – Detached" (2,440 units), a variety of units with other SF use codes were also constructed, including duplexes, condominiums, and manufactured homes (owned and leased). MF development ranged from three and four family residences to 301+ unit construction. About 66 percent (1,105 units) of these new MF units were 2+ BR units, while the remainder (577 units) were 0–1 units.

All students (grades kindergarten [K] through 12) in the March 1, 2022, 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 2014–2021 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 2014 and 2021) from the SCAO were compared with the District's March 2021 SIS, and the number of students at each grade level living in those units was determined. The 2,757 SF units were compared to the 20,608 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	159	0.058
1	147	0.053
2	138	0.050
3	147	0.053
4	125	0.045
5	113	0.041
6	88	0.032
7	83	0.030
8	72	0.026
9	51	0.018
10	48	0.017
11	41	0.015
12	50	0.018
K-5	829	0.301
6-8	243	0.088
9-12	190	0.069
K-12	1,262	0.458

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 seven 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 Farm By Vintage, Gateway, Silver Creek Apartment Homes, and Riverview Apartments. Despite numerous attempts, no bedroom information could be received from Kinect at Broadway, The Landing at Port Gardner, and HopeWorks Station II for the 28 students living at units within these buildings. Based on trends within and surrounding the district, we assumed 90 percent of the students would reside within a 2+ BR unit with the remaining 10 percent residing within a 0–1 BR unit.

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 March 2022 SIS and determining the number of students at each grade level living in those units. As of this writing, FLO estimates that 577 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	3	0.005
1	2	0.004
2	1	0.002
3	0	0.000
4	0	0.000
5	0	0.000
6	0	0.000
7	0	0.000
8	0	0.000
9	0	0.000
10	0	0.000
11	0	0.000
12	0	0.000
K–5	6	0.011
6–8	0	0.000
9–12	0	0.000
K–12	6	0.011

Multifamily 2+ BR Rates

FLO calculated the MF 2+ BR SGRs by comparing data on 2+ BR MF units with the District's March 2022 SIS and determining the number of students at each grade level living in those units. It is estimated that 1,105 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	38	0.034
1	33	0.030
2	33	0.030
3	25	0.023
4	39	0.035
5	23	0.021
6	34	0.031
7	27	0.024
8	43	0.039
9	16	0.014
10	32	0.029
11	23	0.021
12	25	0.023
K-5	191	0.173
6-8	104	0.094
9-12	96	0.087
K-12	391	0.354

Summary of Student Generation Rates

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

Type	K-5	6-8	9-12	K-12
Single-family	0.301	0.088	0.069	0.458
Multifamily 0-1 BR	0.011	0.000	0.000	0.011
Multifamily 2+ BR	0.173	0.094	0.087	0.354

Summary of 2017–2021 Multifamily Developments

Table 5. Summary of Multifamily Developments by Elementary School Boundary

Building Name	Number of Units
The Nines	9
Kinect at Broadway	140
Marquee Apartments	77
The Landing at Port Gardner	51
Riverview Apartments	203
Gateway	177
Hamptons at Mill Creek Apartments	70
Harmony	50
Silver Creek Apartment Homes	41
North Creek Landing Apartments	19
Farm By Vintage	354
Vintage at Mill Creek	220
Koz on N Broadway	124
HopeWorks Station II	65
19th St Condos	12
Artesia Apartments	14

This table does not include three and four family residences along with a 16–20 unit unnamed garden apartment.

Summary of Single-Family Housing Built by Year

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

2014	2015	2016	2017	2018	2019	2020	2021
345	435	538	478	405	232	224	80

Appendix C

OSPI Enrollment Projection Methodology

OSPI PROJECTED STUDENT ENROLLMENT 2020-2027

School Type	Grade Level	School Year & Grade Progression Percentage												AVG GP%
		2022	GP%	2023	GP%	2024	GP%	2025	GP%	2026	GP%	2027	GP%	
Elementary	K	1,528	--	1,513	--	1,497	--	1,482	--	1,467	--	1,451	--	--
	1	1,599	101.5%	1,551	101.5%	1,536	101.5%	1,519	101.5%	1,504	101.5%	1,489	101.5%	101.5%
	2	1,558	100.5%	1,607	100.5%	1,559	100.5%	1,544	100.5%	1,526	100.5%	1,511	100.5%	100.5%
	3	1,582	99.4%	1,549	99.4%	1,598	99.4%	1,550	99.4%	1,535	99.4%	1,517	99.4%	99.4%
	4	1,605	98.8%	1,564	98.9%	1,531	98.8%	1,579	98.8%	1,532	98.8%	1,517	98.8%	98.8%
	5	1,547	99.3%	1,593	99.3%	1,553	99.3%	1,520	99.3%	1,567	99.2%	1,521	99.3%	99.3%
Middle	6	1,512	98.3%	1,521	98.3%	1,566	98.3%	1,527	98.3%	1,494	98.3%	1,541	98.3%	98.3%
	7	1,436	98.4%	1,488	98.4%	1,496	98.4%	1,541	98.4%	1,502	98.4%	1,470	98.4%	98.4%
	8	1,546	98.7%	1,417	98.7%	1,469	98.7%	1,477	98.7%	1,521	98.7%	1,482	98.7%	98.7%
	9	1,583	98.1%	1,516	98.1%	1,390	98.1%	1,441	98.1%	1,448	98.0%	1,491	98.0%	98.1%
High	10	1,422	97.7%	1,546	97.7%	1,481	97.7%	1,358	97.7%	1,408	97.7%	1,414	97.7%	97.7%
	11	1,328	91.6%	1,303	91.6%	1,417	91.7%	1,357	91.6%	1,244	91.6%	1,290	91.6%	91.6%
	12	1,277	96.2%	1,278	96.2%	1,254	96.2%	1,363	96.2%	1,306	96.2%	1,197	96.2%	96.2%
Elementary Middle High TOTAL		Growth%			Growth%			Growth%			Growth%			AVG%
		9,419	99.8%	9,377	99.6%	9,274	98.9%	9,194	99.1%	9,131	99.3%	9,006	98.6%	99.2%
		4,494	96.9%	4,426	98.5%	4,531	102.4%	4,545	100.3%	4,517	99.4%	4,493	99.5%	99.5%
		5,610	101.2%	5,643	100.6%	5,542	98.2%	5,519	99.6%	5,406	98.0%	5,392	99.7%	99.5%
		19,523	99.5%	19,446	99.6%	19,347	99.5%	19,258	99.5%	19,054	98.9%	18,891	99.1%	99.4%

Source: OSPI Report 1049

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

ACTUAL STUDENT ENROLLMENT 2011-2021

School Type	Grade Level	School Year & Growth Progression Percentage																						
Elementary	K	2011	GP%	2012	GP%	2013	GP%	2014	GP%	2015	GP%	2016	GP%	2017	GP%	2018	GP%	2019	GP%	2020	GP%	2021	GP%	AVG GP%
		1,566	--	1,492	--	1,592	--	1,545	--	1,464	--	1,571	--	1,623	--	1,657	--	1,624	--	1,445	--	1,576	--	--
	1	1,549	105.5%	1,547	98.8%	1,569	105.2%	1,678	105.4%	1,622	105.0%	1,519	103.8%	1,596	101.6%	1,652	101.8%	1,688	101.9%	1,542	95.0%	1,550	107.3%	102.8%
	2	1,425	89.3%	1,472	95.0%	1,517	98.1%	1,605	102.3%	1,693	100.9%	1,666	102.7%	1,524	100.3%	1,619	101.4%	1,646	99.6%	1,653	97.9%	1,591	103.2%	99.2%
	3	1,500	99.9%	1,550	108.8%	1,461	99.3%	1,530	100.9%	1,636	101.9%	1,699	100.4%	1,682	101.0%	1,549	101.6%	1,638	101.2%	1,566	95.1%	1,624	98.2%	100.7%
	4	1,445	103.0%	1,437	95.8%	1,528	98.6%	1,499	102.6%	1,585	103.6%	1,616	98.8%	1,691	99.5%	1,671	99.3%	1,567	101.2%	1,552	94.7%	1,558	99.5%	99.7%
	5	1,481	103.8%	1,341	92.8%	1,419	98.7%	1,546	101.2%	1,512	100.9%	1,589	100.3%	1,620	100.2%	1,710	101.1%	1,653	98.9%	1,520	97.0%	1,538	99.1%	99.5%
Middle	6	1,425	100.0%	1,429	96.5%	1,341	100.0%	1,400	98.7%	1,570	101.6%	1,486	98.3%	1,598	100.6%	1,593	98.3%	1,715	100.3%	1,593	96.4%	1,460	96.1%	98.8%
	7	1,380	92.1%	1,406	98.7%	1,454	101.7%	1,366	101.9%	1,380	98.6%	1,566	99.7%	1,504	101.2%	1,587	99.3%	1,564	98.2%	1,628	94.9%	1,566	98.3%	98.6%
	8	1,426	101.3%	1,437	104.1%	1,406	100.0%	1,449	99.7%	1,372	100.4%	1,424	103.2%	1,557	99.4%	1,485	98.7%	1,585	99.9%	1,507	96.4%	1,614	99.1%	100.2%
High	9	1,389	100.7%	1,440	101.0%	1,441	100.3%	1,438	102.3%	1,481	102.2%	1,375	100.2%	1,425	100.1%	1,565	100.5%	1,455	98.0%	1,508	95.1%	1,456	96.6%	99.7%
	10	1,438	100.4%	1,361	98.0%	1,422	98.8%	1,414	98.1%	1,422	98.9%	1,479	99.9%	1,366	99.3%	1,398	98.1%	1,510	96.5%	1,432	98.4%	1,449	96.1%	98.4%
	11	1,384	101.4%	1,306	90.8%	1,275	93.7%	1,346	94.7%	1,318	93.2%	1,359	95.6%	1,328	89.8%	1,273	93.2%	1,291	92.3%	1,363	90.3%	1,327	92.7%	93.4%
	12	1,421	104.1%	1,372	99.1%	1,357	103.9%	1,343	105.3%	1,398	103.9%	1,351	102.5%	1,340	98.6%	1,292	97.3%	1,207	94.8%	1,216	94.2%	1,311	96.2%	100.0%
			Growth%		Growth%		Growth%		Growth%		Growth%		Growth%		Growth%		Growth%		Growth%		Growth%		Growth%	AVG %
Elementary		8,966	101.7%	8,839	98.6%	9,086	102.8%	9,403	103.5%	9,512	101.2%	9,660	101.6%	9,736	100.8%	9,858	101.3%	9,816	99.6%	9,278	94.5%	9,437	101.7%	100.6%
Middle School		4,231	98.7%	4,272	101.0%	4,201	98.3%	4,215	100.3%	4,322	102.5%	4,476	103.6%	4,659	104.1%	4,665	100.1%	4,864	104.3%	4,728	97.2%	4,640	98.1%	100.8%
High School		5,632	100.5%	5,479	97.3%	5,495	100.3%	5,541	100.8%	5,619	101.4%	5,564	99.0%	5,459	98.1%	5,528	101.3%	5,463	98.8%	5,519	101.0%	5,543	100.4%	99.9%
TOTAL:		18,829	100.6%	18,590	98.7%	18,782	101.0%	19,159	102.0%	19,453	101.5%	19,700	101.3%	19,854	100.8%	20,051	101.0%	20,143	100.5%	19,525	96.9%	19,620	100.5%	100.4%

Source: OSPI Report 1049

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

Appendix D

OFM Ratio Enrollment Projection Methodology

Enrollment Forecasts OFM 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	147,361	20,051	13.61%
2019	150,119	20,143	13.42%
2020	148,194	19,525	13.18%
2021	150,347	19,620	13.05%

Population: 2010 and 2020: Federal Census.

Other: Official County Estimate Enrollment: OSPI

The official Census population count for Snohomish County in 2020 was 827,957. The official population projection 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 the 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 15 years. Enrollments as reported by the Office of the Superintendent of Public Instruction (OSPI) are shown along with the computed ratio of the two figures.

Ratio estimates have shown a continual decline since 2006, reflecting a decline in the number of students per household as the population grows. A more significant decline in the ratio occurred in 2020 and 2021, likely due to the effects of the COVID-19 pandemic with its remote teaching, homeschooling, student transfers, and other anomalies. For this reason, future ratios and enrollment estimates (Table D-2) did not rely solely on the 2020 and 2021 numbers.

For its planning purposes, the district has accepted the County's estimated population for 2044 (214,341). The 2022-2044 population estimates were prorated using that figure, an average of 2811 new residents per year. The district assumes that the student population ratio will decline to 11.00% in 2044. The resulting enrollment forecasts are presented in Table D-2.

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 the County Code (SCC 30.66C).

Table D-2 Future Enrollments - Ratio Method								
Actual		Estimated						
2020	2021	2022	2023	2024	2025	2026	2027	2044
Population								
148,194	150,347	152,500	155,311	158,122	160,933	163,744	166,555	214,341
Ratio								
13.18%	13.05%	12.90%	12.72%	12.54%	12.36%	12.20%	12.00%	11.00%
Enrollment								
19,525	19,620	19,673	19,756	19,828	19,891	19,977	19,987	23,578

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
2022-27**

Enrollment Projections by Grade

Grade Level	Actual 2021	Projections					
		2022	2023	2024	2025	2026	2027
K	1,577	1,617	1,654	1,611	1,530	1,577	1,588
1	1,550	1,651	1,667	1,684	1,650	1,546	1,611
2	1,593	1,579	1,685	1,676	1,693	1,659	1,554
3	1,625	1,609	1,602	1,684	1,676	1,692	1,659
4	1,560	1,623	1,622	1,592	1,673	1,665	1,681
5	1,540	1,558	1,637	1,612	1,582	1,663	1,654
6	1,460	1,528	1,550	1,632	1,607	1,577	1,658
7	1,567	1,449	1,529	1,551	1,633	1,608	1,578
8	1,614	1,556	1,439	1,518	1,540	1,621	1,597
9	1,456	1,602	1,544	1,421	1,499	1,521	1,601
10	1,449	1,420	1,562	1,506	1,385	1,462	1,483
11	1,330	1,336	1,309	1,440	1,388	1,277	1,348
12	1,312	1,288	1,294	1,268	1,395	1,345	1,237
Total	19,633	19,816	20,094	20,195	20,251	20,213	20,249

Enrollment Projections by Level

K-5	9,445	9,637	9,867	9,859	9,804	9,802	9,747
6-8	4,641	4,533	4,518	4,701	4,780	4,806	4,833
9-12	5,547	5,646	5,709	5,635	5,667	5,605	5,669

Appendix F

Levels of Service Report

2021-22

Levels of Service Report

(October 2021 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 2021-22 school year are shown below.

Average Class Size	
Elementary	
Kindergarten	20.0
Grades 1 - 3	20.6
Grades 4 - 5	24.2
Middle School	
Grades 6 - 8	24.1
High School	
Grades 9 - 12	24.5

Appendix G

Impact Fee Report

2020

January 1 – December 31

School Impact fee Report

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

2020

Impact Fees

Revenue: **\$ 1,489,411.00**

Expenditures: **\$ 1,411,066.17**

Sites

\$ 86,654.57	Emerson Elementary School
\$ 89,565.37	Jackson Elementary School
\$ 12,976.53	Jefferson Elementary School
\$ 21,821.97	Lowell Elementary School
\$ 10,334.73	Woodsied Elementary School
\$ 4,944.57	Silver Lake Elementary School
\$ 205,706.83	Cedar Wood Elementary School
\$ 97,798.04	Mill Creek Elementary School
\$ 16,186.65	Silver Firs Elementary School
\$ 306,914.71	Forest View Elementary School
\$ 132,445.02	Evergreen Middle School
\$ 93,157.41	Heatherwood Middle School
\$ 117,283.85	Gateway Middle School
\$ 215,275.92	Cascade High School

Mitigation Fee Credit

2020 Beginning Balance: **\$ 79,750.02**

2020 Ending Balance: **\$ 79,750.02**

Annual School District Report of Impact Fees Collected and Spent

Reporting Year {Calendar Year}: 2021

School District Name: Everett School District #2

Date Submitted: 3/9/2022

Report Submitted By: Chuck Booth, Facilities and Planning Specialist

IMPACT FEE RECEIPTS for reporting period (calendar year)

Total Amount Received: \$444,236.00

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: \$-21.727.00

List of Capital Facilities Projects and expenditure for each:

Project Name	Expenditures for Reporting Year
Portable Classroom Garfield ES	-393.35
Portable Classroom Jackson ES	2,902.51
Portable Classroom Silver Lake ES	140.00
Portable Classroom Cedar Wood ES	-15,110.02
Portable Classroom Mill Creek ES	1,830.74
Portable Classroom Forest View ES	366.24
Portable Classroom Tambark Creek ES	4,746.12
Portable Classroom Heatherwood MS	-2,602.07
Portable Classroom Gateway MS	-9,748.44
Portable Classroom Cascade HS	-7,359.79
Merchant Fees Sno County	3,501.06

*credit amounts above are due to overstated expenditures on the 2020 year. The credits are corrections made in 2021.

Inspiring Excellence



LAKE STEVENS

School District

2022 – 2027 CAPITAL FACILITIES PLAN

LAKE STEVENS SCHOOL DISTRICT NO. 4

prepared for:

Snohomish County

And

City of Lake Stevens
City of Marysville

July 26, 2022

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

Ken Collins, 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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APPENDICES

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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-two years (2044), with a more detailed schedule and financing program for capital improvements over the next six years (2022-2027). This CFP is based in large measure on the 2015 Facilities Master Plan for the Lake Stevens School District.

When Snohomish County adopted its GMA Comprehensive Plan in 1995, it addressed future school capital facilities plans in Appendix F of the General Policy 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 2020.

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.	25	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 2021 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 The BlueLine Group (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 9,256³ 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 April 2022 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 616 certificated staff members and 606 classified staff for a total of 1,222.

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 2027 for K-5 of 1,633 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 2022 is \$485,760 for single-family detached residential dwellings; \$169,461 for one-bedroom (*Small*) multi-family units, and \$239,226 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 2022, a rate of 2.45% is used. (See also “Interest Rate”)

*Capital Facilities means school facilities identified in the District’s capital facilities plan that are “system improvements” as defined by the GMA as opposed to localized “project improvements.”

*Capital Facilities Plan (CFP) means the District’s facilities plan adopted by its school board consisting of those elements required by Chapter 30.66C SCC and meeting the requirements of the GMA and Appendix F of the General Policy Plan. The definition refers to *this* document, which is consistent with the adopted “2015 Facilities Plan for the Lake Stevens School District,” which is a separate document. Construction Cost Allocation (formerly the Boeckh Index) means a factor used by OSPI as a guideline for determining the area cost allowance for new school construction. The Index for the 2022 Capital Facilities Plan is \$246.83, as provided by Snohomish County.

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

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

*County means Snohomish County.

*Commerce means the Washington State Department of Commerce.

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

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

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

*Development Approval means any written authorization from the County and/or City, which authorizes the commencement of a development activity.

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

District means Lake Stevens School District No. 4.

*District Property Tax Levy Rate (Capital Levy) means the District's current capital property tax rate per thousand dollars of assessed value. For this Capital Facilities Plan, the assumed levy rate is .00152.

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

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

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

*FTE (Full Time Equivalent) is a means of measuring student enrollment based on the number of hours per day in attendance at the District’s schools. A student is considered one FTE if they are enrolled for the equivalent of a full schedule each full day.

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

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

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

*Interest Rate means the current interest rate as stated in the Bond Buyer Twenty Bond General Obligation Bond Index. For this Capital Facilities Plan an assumed rate of 2.45% 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 2022 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 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 transitional facilities or from any specialized facilities housed in relocatable facilities.

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

*Student Factor (Student Generation Rate [SGR]) means the number of students of each grade span (elementary, middle, mid-high and high school) that the District determines are typically generated by different dwelling unit types within the 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 developmentally delayed preschool
- Highly Capable
- Home School Partnership (HomeLink)
- Language Assistance Program (LAP)
- Life Skills Self-Contained Program
- Multi-Age Instruction
- Multi-tiered Systems of Support
- Occupational and Physical Therapy
- 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 **19** students.
- Average class size for grades 1-3 should not exceed **20** students.
- Average class size for grades 4-5 should not exceed **25** students.
- Special Education for students may be provided in a self-contained classroom. The practical capacity for these classrooms is **12** students.
- All students will be provided music instruction in a separate classroom.
- Students may have a scheduled time in a computer lab.
- Optimum design capacity for new elementary schools is 550 students. However, actual capacity of individual schools may vary depending on the educational programs offered.

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

- Class size for secondary grade (6-12) regular classrooms should not exceed **27** students.
- Special Education for students may be provided in a self-contained classroom. The practical capacity for these classrooms is 12 students.
- As a result of scheduling conflicts for student programs, the need for specialized rooms for certain programs, and the need for teachers to have a workspace during planning periods, it is not possible to achieve 100% utilization of all regular teaching stations throughout the day. Therefore, classroom capacity is adjusted using a utilization factor of 83% at the high school, mid-high and middle school levels.
- Some Special Education services for students will be provided in a self-contained classroom.
- Identified students will also be provided other nontraditional educational opportunities in classrooms designated as follows:
 - Resource Rooms (i.e., computer labs, study rooms).
 - Special Education Classrooms.
- Program Specific Classrooms:

- Music
- Physical Education
- Drama
- Family and Consumer Sciences
- Art
- Career and Technical Education

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

Minimum Educational Program Standards

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

The Lake Stevens School District has set minimum educational program standards based on several criteria. Exceeding these minimum standards will trigger significant changes in program delivery. If there are 25 or fewer students in a majority of K-5 classrooms, the standards have been met; if there are 27 or fewer students in a majority of 6-12 classrooms, the minimum standards have been met. The Lake Stevens School District meets these standards at all grade levels.

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

Grade level	Classrooms above MEPS	Total Classrooms	% Meeting MEPS
Total Elementary	21	194	89%
Total Secondary	30	163	82%
District Total	51	357	86%

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	42,673	22	2	473	598	1992	Yes
Highland Elementary	8.7	49,727	19	4	433	633	1999	Yes
Hillcrest Elementary	15.0	49,735	23		503	753	2008	Yes
Mt. Pilchuck Elementary	22.0	49,833	18	3	407	557	2008	Yes
Skyline Elementary	15.0	42,673	22	2	484	669	1992	Yes
Stevens Creek Elementary	20.0	78,880	26	2	560	560	2018	Yes
Sunnycrest Elementary	15.0	46,970	25		514	614	2009	Yes
Elementary Total	104.7	360,491	155	13	3,374	4,384		
Middle Schools								
Lake Stevens Middle School	25.0	86,374	28	6	647	839	1996	Yes
North Lake Middle School	15.0	90,323	29	5	707	909	2001	Yes
Middle School Total	40.0	176,697	57	11	1,354	1,748		
Mid-High								
Cavelero Mid-High School	37.0	224,694	60	7	1,382	1,382	2007	Yes
Mid-High Total	37.0	224,694	60	7	1,382	1,382		
High Schools								
Lake Stevens High School	38.0	207,195	91	6	2,104	2,104	2021	Yes
High School Total	38.0	207,195	91	6	2,104	2,104		
District Totals	219.7	969,077	363	37	8,214	9,618		

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

Leased Facilities

The District does not lease any permanent classrooms.

Relocatable Classrooms (Portables)

Portables are used as interim classroom space to house students until funding can be secured to construct permanent classroom facilities. Portables are not viewed by the District as a solution for housing students on a permanent basis. The Lake Stevens School District currently uses 86 portable classrooms at various school sites throughout the District to provide interim 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 on 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	8	200	Good	7,168
Hillcrest	21	250	Good/excellent	18,816
Mt. Pilchuck	9	150	Good	8,064
Skyline	11	185	Good/excellent	9,856
Stevens Creek	0	0	NA	0
Sunnycrest	7	100	Good	6,272
Elementary Total	66	1,010		59,136
<u>MIDDLE SCHOOLS</u>				
Lake Stevens Middle	11	192	Good	9,856
North Lake Middle	9	202	Good	8,064
Middle Schools Total	20	394		17,920
<u>MID-HIGH SCHOOL</u>				
Cavelero Mid-High	None	0		0
Mid-High Total	0	0		0
<u>HIGH SCHOOL</u>				
Lake Stevens High School	None	0		0
High School Total	0	0		0
District K-12 Total	86	1,404		77,056

The District will continue to purchase or move existing portables, as needed, to cover the gap between the time that families move into new residential developments and the time the District is able to complete construction on permanent school facilities.

Support Facilities

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

Table 4-3 – Support Facilities

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

Land Inventory

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

Ten acres located in the northeast area of the District (Lochsloy area), west of Highway 92. This site will eventually be used for an elementary school (beyond the year 2027). It is presently used as an auxiliary sports field.

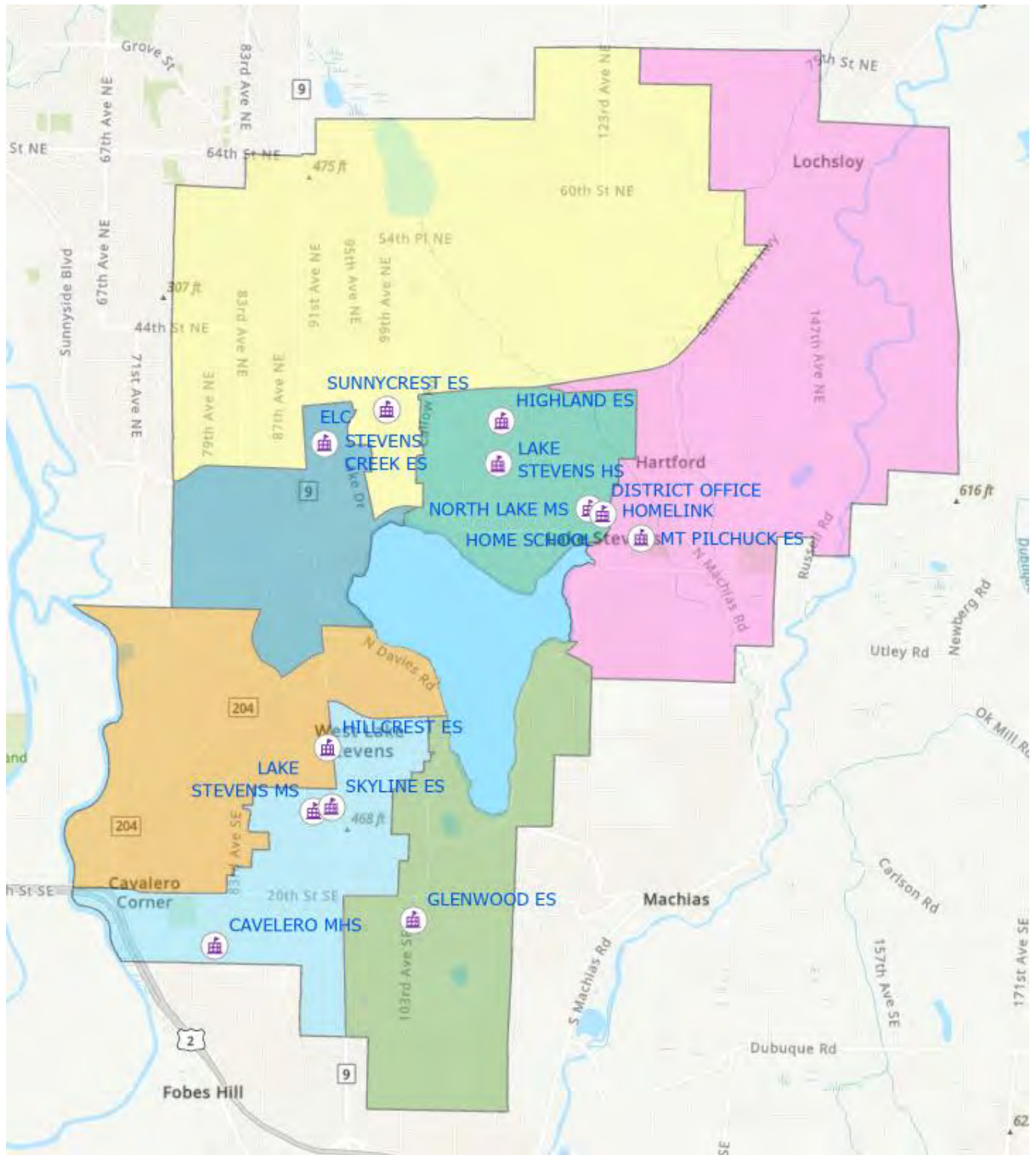
An approximately 35-acre site northeast of the intersection of Highway 9 and Soper Hill Road bordered by Lake Drive on the east. This is the site of the district's newest elementary school and early learning center. The remainder of the site is planned for a future middle school.

A parcel of approximately 23 acres located at 20th Street SE and 83rd Street. This property was donated to the School District for an educational facility. The property is encumbered by wetlands and easements, leaving less than 10 available acres. It is planned to be a future elementary school.

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

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

Figure 1 – Map of District Facilities

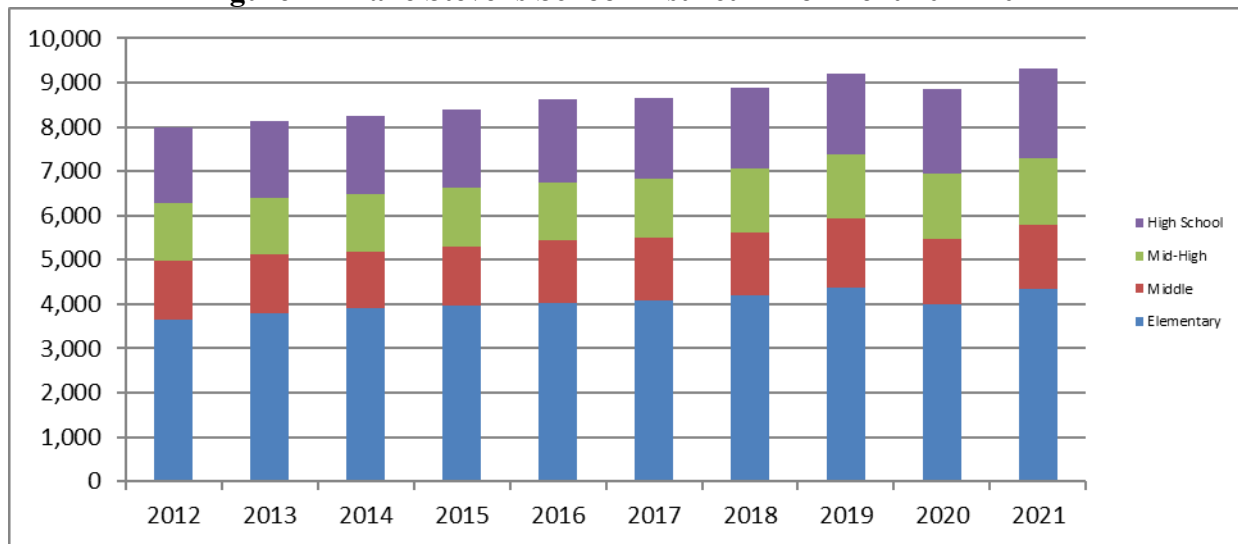


SECTION 5: STUDENT ENROLLMENT TRENDS AND PROJECTIONS

Historic Trends and Projections

Student enrollment in the Lake Stevens School District remained relatively constant between 1973 and 1985 (15%) and then grew significantly from 1985 through 2005 (approximately 120%). Between 2012 and 2021, student enrollment increased by 1,338 students, over 16%. Overall, there was a 2.5% increase countywide during this period, with seven districts losing enrollment. The District has been and is projected to continue to be one of the fastest growing districts in Snohomish County based on the OFM-based population forecast. Population is estimated by the County to rise from 50,461 in 2020 to almost 67,294 in Year 2044, an increase of 33%.

Figure 2 – Lake Stevens School District Enrollment 2012-2021



Enrollment projections are most accurate for the initial years of the forecast period. Moving further into the future, economic conditions and demographic trends in the area affect the estimates. Monitoring population growth for the area are essential yearly activities in the ongoing management of the capital facilities plan. In the event enrollment growth slows, plans for new facilities can be delayed. It is much more difficult, however, to initiate new projects or speed projects up in the event enrollment growth exceeds the projections. Table 5-1 shows enrollment growth from 2012 to 2021 according to OSPI and District records.

Table 5-1 - Enrollment 2011-2019

	2012	2013	2014	2015	2016	2017	2018	2019	2020	2021
Elementary	3,658	3,783	3,917	3,971	4,030	4,083	4,207	4,362	3,998	4,354
Middle	1,307	1,328	1,261	1,314	1,398	1,405	1,414	1,556	1,468	1,426
Mid-High	1,313	1,283	1,318	1,331	1,312	1,344	1,426	1,448	1,476	1,524
High School	1,709	1,732	1,757	1,776	1,871	1,814	1,828	1,834	1,912	2,021
Total	7,987	8,126	8,253	8,392	8,611	8,646	8,875	9,200	8,854	9,325

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 2010-2021, the average percentage was 18.6%. For future planning, a level rate of 18.5% was used through 2027 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.

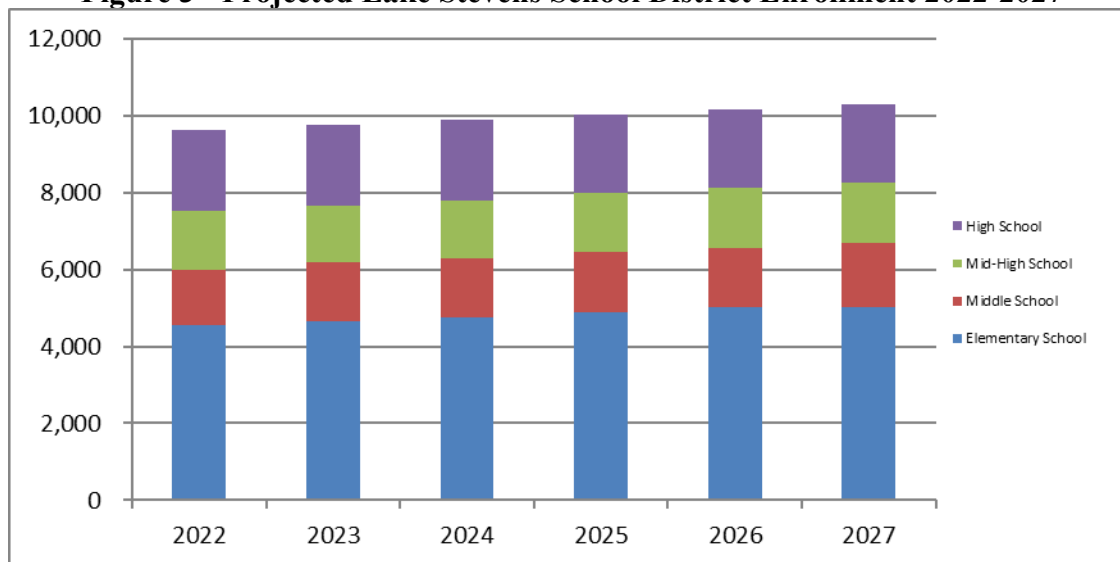
Ratio Method estimates are found in Table 5-2. These have been adopted as part of this Capital Facilities Plan.

Table 5-2 - Projected Enrollment 2022-2027

	2021*	2022	2023	2024	2025	2026	2027
Elementary School	4,354	4,536	4,648	4,737	4,884	5,031	5,007
Middle School	1,426	1,464	1,530	1,563	1,554	1,520	1,681
Mid-High School	1,524	1,506	1,470	1,480	1,543	1,574	1,553
High School	2,021	2,106	2,101	2,107	2,044	2,038	2,060
Total	9,325	9,612	9,750	9,888	10,026	10,164	10,302

*October 2021 Headcount

Figure 3 - Projected Lake Stevens School District Enrollment 2022-2027



In summary, the Ratio Method estimates that headcount enrollment will total 10,302 students in 2027. This represents a 10.5% increase over 2021. The District accepts the Ratio Method estimate for its 2022 CFP planning.

2044 Enrollment Projection

The District projects a 2044 student enrollment of 12,449 based on the Ratio method. (OSPI does not forecast enrollments beyond 2027). The forecast is based on the County's OFM-based population forecast of 67,294 in the District. Although student enrollment projections beyond 2027 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)	5,824
Middle (6-7)	2,017
Mid-High (8-9)	1,984
High (10-12)	2,625
District Total (K-12)	12,449

The 2044 estimate represents a 33.5% increase over 2021 enrollment levels. The total population in the Lake Stevens School District is forecasted to rise by 31%. 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 facility and capacity needs is provided in Section 6 of this Capital Facilities Plan.

SECTION 6: CAPITAL FACILITIES PLAN

Existing Deficiencies

Current enrollment at each grade level is identified in Table 5-2. The District currently (2021) has 980 unhoused students at the elementary level, 72 unhoused students at the middle school level and 142 unhoused students at the mid-high level. It has excess capacity high school (83) level.

Facility Needs (2022-2027)

Projected available student capacity was derived by subtracting projected student enrollment from 2021 permanent school capacity (excluding portables) for each of the six years in the forecast period (2022-2027). 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 2027 the District would be over capacity at the elementary level by 1,633 students, 327 students at the middle school level and 171 students at the mid-high school level.

These projected future capacity needs are depicted on Table 6-1. This table compares actual future space needs with the portion of those needs that are "growth related." RCW 82.02 and Chapter 30.66C SCC mandate that new developments cannot be assessed impact fees to correct existing deficiencies. Thus, any capacity deficiencies existing in the District in 2021 must be deducted from the total projected deficiencies before impact fees are assessed.

Table 6-1 - Projected Additional Capacity Needs 2022 – 2027

Grade Span	2021*	2022	2023	2024	2025	2026	2027
Elementary (K-5)							
Permanent capacity	3,374	3,374	3,374	3,374	3,374	3,374	3,374
Enrollment	4,354	4,535	4,648	4,737	4,884	5,031	5,007
Capacity Surplus/(Deficit)	(980)	(1,161)	(1,274)	(1,363)	(1,510)	(1,657)	(1,633)
Growth Related		(181)	(294)	(383)	(530)	(677)	(653)
Middle School (6-7)							
Permanent capacity	1,354	1,354	1,354	1,354	1,354	1,354	1,354
Enrollment	1,426	1,464	1,530	1,563	1,553	1,520	1,681
Capacity Surplus/(Deficit)	(72)	(110)	(176)	(209)	(199)	(166)	(327)
Growth Related		(38)	(104)	(137)	(127)	(94)	(255)
Mid-High (8-9)							
Permanent capacity	1,382	1,382	1,382	1,382	1,382	1,382	1,382
Enrollment	1,524	1,505	1,470	1,480	1,543	1,574	1,553
Capacity Surplus/(Deficit)	(142)	(123)	(88)	(98)	(161)	(192)	(171)
Growth Related		19	54	44	(19)	(50)	(29)
High School (10-12)							
Permanent capacity	2,104	2,104	2,104	2,104	2,104	2,104	2,104
Enrollment	2,021	2,106	2,101	2,107	2,044	2,038	2,060
Capacity Surplus/(Deficit)	83	(2)	3	(3)	60	66	44
Growth Related		0	0	0	0	0	0
* October 2021 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 2027 & 2044

Grade Level	2022 Capacity	2027 Enrollment	2027 Additional Capacity Needed	2044 Enrollment	2044 Additional Capacity Needed
Elementary	3,374	5,007	1,633	5,824	2,450
Middle School	1,354	1,681	327	2,017	663
Mid-High	1,382	1,553	171	1,984	602
High School	2,104	2,060	0	2,625	521
Total	8,214	10,302	2,132	12,449	4,235

Planned Improvements (2022 - 2027)

The following is a brief outline of those projects likely needed to accommodate unhoused students in the Lake Stevens School District through the Year 2027 based on OSPI enrollment projections.

Elementary Schools: Based upon current enrollment estimates, elementary student population will increase to the level of requiring three new elementary schools. The CFP reflects acquisition of land for two schools and the construction of three elementary schools in 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 a new middle school. The CFP reflects the construction of a new 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 2022-2027. 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 – 2022-2027 Capital Facilities Plan

Estimated Project Cost by Year (In \$Millions)	2022	2023	2024	2025	2026	2027	Total	Local Cost*	State Match
Improvements Adding Student Capacity									
Elementary									
Site Acquisition									
Acres				22			22		
Purchase Cost				\$4.4			\$ 4.4	\$ 4.4	\$ -
Capacity Addition				1200			1200		
Relocatable Facilities Cost	\$0.5	\$0.5	\$0.5				\$ 1.5	\$ 1.5	
Capacity Addition	100	100	100				300		
Construction Cost					\$45.0	\$ 90.0	\$135.0	\$ 81.0	\$54.0
Capacity Addition					600	1200	1800		
Middle									
Site Acquisition									
Acres							-		
Purchase Cost							\$ -		
Capacity Addition							-		
Relocatable Facilities Cost		\$0.3	\$0.3				\$ 0.6	\$ 0.6	
Capacity Addition		50	50				100		
Construction Cost						\$ 67.5	\$ 67.5	\$ 40.5	\$27.0
Capacity Addition						750	750		
Mid-High									
Site Acquisition									
Acres							-		
Purchase Cost							-		
Capacity Addition							-		
Relocatable Facilities Cost	\$0.3	\$0.3					\$ 0.5	\$ 0.5	
Capacity Addition	50	50					100		
Construction Cost							\$ -		
Capacity Addition							-		
High School									
Site Acquisition									
Acres							-		
Purchase Cost							-		
Capacity Addition							-		
Relocatable Facilities Cost							\$ -	\$ -	
Capacity Addition							0		
Construction Cost							\$ -		
Capacity Addition							-		
Total Cost	\$-	\$-	\$-	\$4.4	\$45.0	\$157.5	\$206.9	\$125.9	\$81.0
Improvements Not Adding Student Capacity									
Elementary									
Construction Cost									
Middle									
Construction Cost									
Mid-High									
Construction Cost									
High School									
Construction Cost									
District-wide Improvements									
Construction Cost									
Total Cost	-	-	-	-	-	-	-	-	-
Elementary (including land acquisition)	\$0.5	\$0.5	\$0.5	\$4.4	\$45.0	\$ 90.0	\$140.9	\$ 86.9	\$54.0
Middle	\$-	0.3	0.3	\$-	\$ -	\$ 67.5	\$ 68.1	\$ 41.1	\$27.0
Mid-High	\$0.3	0.3	-	-	-	-	0.5	0.5	-
High School	\$-	-	-	-	-	-	-	-	-
District Wide	\$-	-	-	-	-	-	-	-	-
Annual Total	\$0.8	\$1.0	\$0.8	\$4.4	\$45.0	\$157.5	\$209.5	\$128.5	\$81.0

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

General Obligation Bonds: Bonds are typically used to fund construction of new schools and other capital improvement projects. A 60% voter approval is required to pass a bond. Bonds are then retired through collection of property taxes. A capital improvements bond for \$116,000,000 was approved by the electorate in February 2016. Funds have been used to construct a new elementary school and modernize Lake Stevens High School, as well as fund other non-growth-related projects.

The total costs of the growth-related projects outlined in Table 6-3 represent recent and current bids per information obtained through OSPI, the District's architect and neighboring school districts that have recently or are planning to construct classroom space. An escalation factor of 6% per year has been applied out to 2027.

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

School districts may qualify for State matching funds for a specific capital project. To qualify, a project must first meet State-established criteria of need. This is determined by a formula that specifies the amount of square footage the State will help finance to house the enrollment projected for the district. If a project qualifies, it can become part of a State prioritization system. This system prioritizes allocation of available funding resources to school districts based on a formula which calculates district assessed valuation per pupil relative to the whole State assessed valuation per pupil to establish the percent of the total project cost to be paid by the State for eligible projects.

State Match Funds can only be applied to major school construction projects. Site acquisition and minor improvements are not eligible to receive matching funds from the State. Because state matching funds are dispersed after a district has paid its local share of the project, matching funds from the State may not be received by a school district until after a school has been constructed. In such cases, the District must "front fund" a project. That is, the District must finance the project with local funds. When the State share is finally disbursed (without accounting for escalation) the future District project is partially reimbursed.

Because of the method of computing state match, the District has historically received approximately 39% of the actual cost of school construction in state matching funds. For its 2022 CFP, the District assumes a 40% match.

School Impact Fees: Development impact fees have been adopted by several jurisdictions as a means of supplementing traditional funding sources for construction of public facilities needed to accommodate new development. School impact fees are generally collected by the permitting agency at the time building permits or certificates of occupancy are issued.

Impact fees have been calculated utilizing the formula in Chapter 30.66C SCC. The resulting figures are based on the District's cost per dwelling unit to purchase land for school sites, make site improvements, construct schools and purchase, install or relocate temporary facilities (portables). Credits have also

been applied in the formula to account for state match funds to be reimbursed to the District and projected future property taxes to be paid by the owner of a dwelling unit. The costs of projects that do not add capacity or which address existing deficiencies have been eliminated from the variables used in the calculations. Only capacity improvements are eligible for impact fees.

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

Table 6-4 – Impact Fee Revenue and Expenditures

Year	Revenue	Expenditure
2020	\$ 1,604,948	\$ 119,820
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	\$12,675,580	\$11,658,268

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

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

The financing plan separates projects and portions of projects that add capacity from those that do not, since non-capacity improvements are not eligible for impact fee funding. The financing plan and impact fee calculation also differentiate between projects or portions of projects that address existing deficiencies (ineligible for impact fees) and those which address future growth-related needs (Table 6-1). From this process, the District can develop a plan that can be translated into a bond issue package for submittal to District voters, if deemed appropriate.

Table 6-5 presents an estimate of the capacity impacts of the proposed capital construction projects.

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

2021	Elementary	Middle	Mid-High	High School
Existing Capacity	3,374	1,354	1,382	2,104
Programmed Improvement Capacity				
Capacity After Improvement	3,374	1,354	1,382	2,104
Current Enrollment	4,354	1,426	1,524	2,021
Surplus (Deficit) After Improvement	(980)	(72)	(142)	83
2022	Elementary	Middle	Mid-High	High School
Existing Capacity	3,374	1,354	1,382	2,104
Programmed Improvement Capacity				
Capacity After Improvement	3,374	1,354	1,382	2,104
Projected Enrollment	4,536	1,464	1,506	2,106
Surplus (Deficit) After Improvement	(1,162)	(110)	(124)	(2)
2023	Elementary	Middle	Mid-High	High School
Existing Capacity	3,374	1,354	1,382	2,104
Programmed Improvement Capacity	0			
Capacity After Improvement	3,374	1,354	1,382	2,104
Projected Enrollment	4,648	1,530	1,470	2,101
Surplus (Deficit) After Improvement	(1,274)	(176)	(88)	3
2024	Elementary	Middle	Mid-High	High School
Existing Capacity	3,374	1,354	1,382	2,104
Programmed Improvement Capacity				
Capacity After Improvement	3,374	1,354	1,382	2,104
Projected Enrollment	4,737	1,563	1,480	2,107
Surplus (Deficit) After Improvement	(1,363)	(209)	(98)	(3)
2025	Elementary	Middle	Mid-High	High School
Existing Capacity	3,374	1,354	1,382	2,104
Programmed Improvement Capacity				
Capacity After Improvement	3,374	1,354	1,382	2,104
Projected Enrollment	4,884	1,554	1,543	2,044
Surplus (Deficit) After Improvement*	(1,510)	(200)	(161)	60
2026	Elementary	Middle	Mid-High	High School
Existing Capacity	3,374	1,354	1,382	2,104
Programmed Improvement Capacity	600			
Capacity After Improvement	3,974	1,354	1,382	2,104
Projected Enrollment	5,031	1,520	1,574	2,038
Surplus (Deficit) After Improvement*	(1,057)	(166)	(192)	66
2027	Elementary	Middle	Mid-High	High School
Existing Capacity	3,974	1,354	1,382	2,104
Programmed Improvement Capacity	1,200	750		
Capacity After Improvement	5,174	2,104	1,382	2,104
Projected Enrollment	5,007	1,681	1,553	2,060
Surplus (Deficit) After Improvement	167	423	(171)	44

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, 2022 - 2027. As noted previously, the District will need to acquire two additional elementary school sites between 2022 and 2027.

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 600 students, new middle schools 750 students and new high schools 1,500 students.

Student Factor: The student factor (or student generation rate) is the average number of students generated by each housing type – in this case: single-family detached dwellings and multiple-family dwellings. Multiple-family dwellings, which may be rental or owner-occupied units within structures containing two or more dwelling units, were broken out into one-bedroom and two-plus bedroom units. Pursuant to a requirement of Chapter 30.66C SCC, each school district was required to conduct student generation studies within their jurisdictions. A description of this methodology is contained in Appendix C. The Blueline Group 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

2022

Student Generation Rates	Elementary	Middle	Mid-High	High	Total
Single Family	0.348	0.091	0.090	0.101	0.630
Multiple Family, 1 Bedroom	No data	No data	No data	No data	No data
Multiple Family, 2+ Bedroom	0.092	0.031	0.000	0.023	0.146

2020

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

The table also shows the Student Generation rates from the 2020 CFP. For the last three cycles, the

studies showed no records of one-bedroom apartment construction. There has been a gradual decline in student generation rates at all levels and for all 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 2021) 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 2027: 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 \$246.83 (July 2022) up from \$238.22 in 2020.

State Match Percentage: The State match percentage is the proportion of funds that are provided to the school districts, for specific capital projects, from the State's Common School Construction Fund. These funds are disbursed based on a formula which calculates the District's assessed valuation per pupil relative to the whole State assessed valuation per pupil to establish the percentage of the total project to be paid by the State. The District will continue to use a state match percentage of 40%.

5. Tax Credit Variables

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

Interest Rate (20-year GO Bond): This is the interest rate of return on a 20-year General Obligation Bond and is derived from the bond buyer index. The current assumed interest rate is 2.44%.

Levy Rate (in mils): The Property Tax Levy Rate (for bonds) is determined by dividing the District's average capital property tax rate by one thousand. The current levy rate for the Lake Stevens School District is 0.00152.

Average Assessed Value: This figure is based on the District's average assessed value for each type of dwelling unit (single-family and multiple family). The averaged assessed values are based on estimates made by the County's Planning and Development Services Department utilizing information from the Assessor's files. The current average assessed value for 2022 for single-family detached residential dwellings is \$485,760, up from \$423,231 in 2020 and \$349,255 in 2018); \$169,461 for one-bedroom multi-family unit (\$125,314 in 2020; \$91,988 in 2018), and \$239,226 for two or more bedroom multi-family units (2020: \$178,051; 2018: \$136,499).

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	653	255	29	0
Discount (Snohomish County, Lake Stevens and Marysville)	50%	50%	50%	50%
Student Factor	Elementary	Middle	Mid-High	High
Single Family	0.348	0.091	0.090	0.101
Multiple Family 1 Bedroom	No data	No data	No data	No data
Multiple Family 2+ Bedroom	0.092	0.031	0	0.023
Site Acquisition Cost Element	Elementary	Middle	Mid-High	High
Site Needs (acres)	22	0	0	0
Growth Related	11.97	0	0	0
Cost Per Acre	\$200,000.00	\$200,000.00	\$200,000.00	\$200,000.00
Additional Capacity	1200	0	0	0
Growth Related	653	255	29	0
School Construction Cost Element	Elementary	Middle	Mid-High	High
Estimated Facility Construction Cost	\$135,000,000	\$67,500,000	\$0	\$0
Growth Related	\$48,975,000	\$22,950,000	\$0	\$0
Additional Capacity	1800	750	0	0
Growth Related	653	255	29	0
Current Facility Square Footage	360491	176697	224694	207195
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	59,136	17,920	0	0
State Match Credit	Elementary	Middle	Mid-High	High
Cost Construction Allocation	\$246.83	\$246.83	\$246.83	\$246.83
School Space per Student (OSPI)	90	117	117	130
State Match Percentage	40.0%	40.0%	40.0%	40.0%
Tax Payment Credit	Elementary	Middle	Mid-High	High
Interest Rate	2.45%	2.45%	2.45%	2.45%
Loan Payoff (Years)	10	10	10	10
Property Tax Levy Rate (Bonds)	0.00152	0.00152	0.00152	0.00152
Average AV per DU Type	SFR	MF 1 Bdrm	MF 2+ Bdrm	
	485,760	169,461	239,226	
		"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	\$22,867	\$11,434
One Bedroom Apartment	\$0	\$0
Two + Bedroom Apartment	\$5,051	\$2,526
Duplex/Townhouse	\$5,051	\$2,526

Appendix A

Impact Fee Calculations

IMPACT FEE WORKSHEET
LAKE STEVENS SCHOOL DISTRICT
SINGLE-FAMILY RESIDENTIAL

SITE ACQUISITION COST

acres needed	<u>11.97</u>	x	\$	<u>200,000</u>	/	capacity (# students)	<u>653</u>	x	student factor	<u>0.348</u>	=	<u>\$1,276</u>	(elementary)
acres needed	<u>0.00</u>	x	\$	<u>200,000</u>	/	capacity (# students)	<u>255</u>	x	student factor	<u>0.091</u>	=	<u>\$0</u>	(middle)
acres needed	<u>0.00</u>	x	\$	<u>200,000</u>	/	capacity (# students)	<u>29</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>0.101</u>	=	<u>\$0</u>	(high school)
TOTAL SITE ACQUISITION COST											=	<u>\$1,276</u>	

SCHOOL CONSTRUCTION COST

total const. cost	<u>\$48,975,000</u>	/		capacity (# students)	<u>653</u>	x	student factor	<u>0.348</u>	=	<u>\$26,100</u>	(elementary)
total const. cost	<u>\$22,950,000</u>	/		capacity (# students)	<u>255</u>	x	student factor	<u>0.091</u>	=	<u>\$8,190</u>	(middle)
total const. cost	<u>\$0</u>	/		capacity (# students)	<u>29</u>	x	student factor	<u>0.090</u>	=	<u>\$0</u>	(mid-high)
total const. cost	<u>\$0</u>	/		capacity (# students)	<u>0</u>	x	student factor	<u>0.101</u>	=	<u>\$0</u>	(high school)
Subtotal										<u>\$34,290</u>	
Total Square Feet		/ Total Square Feet									
of Permanent Space (District)		<u>969,077</u>	of School Facilities (000)	<u>1,046,133</u>					=	92.63%	
TOTAL FACILITY CONSTRUCTION COST										=	<u>\$31,764</u>

RELOCATABLE FACILITIES COST (PORTABLES)

Portable Cost	<u>\$ 250,000</u>	/	<u>25</u>	facility size	x	student factor	<u>0.348</u>	=	<u>\$3,480</u>	(elementary)
Portable Cost	<u>\$ 250,000</u>	/	<u>27</u>	facility size	x	student factor	<u>0.091</u>	=	<u>\$843</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>0.101</u>	=	<u>\$935</u>	(high school)
Subtotal									<u>\$6,091</u>	
Total Square Feet of Portable Space (District)				<u>77,056</u>	/ Total Square Feet of School Facilities (000)			<u>1,046,133</u>	=	<u>7.37%</u>
TOTAL RELOCATABLE COST ELEMENT									=	<u>\$449</u>

CREDIT AGAINST COST CALCULATION -- MANDATORY

STATE MATCH CREDIT

CCA Index	<u>\$ 246.83</u>	x OSPI Allowance	<u>90.00</u>	x	State Match %	<u>40.00%</u>	x	student factor	<u>0.348</u>	=	<u>\$3,092</u>	(elementary)
CCA Index	<u>\$ 246.83</u>	x OSPI Allowance	<u>117.00</u>	x	State Match %	<u>40.00%</u>	x	student factor	<u>0.091</u>	=	<u>\$1,051</u>	(middle)
CCA Index	<u>No projects</u>	x OSPI Allowance	<u>117.00</u>	x	State Match %	<u>40.00%</u>	x	student factor	<u>0.090</u>	=	<u>\$0</u>	(mid-high)
CCA Index	<u>No projects</u>	x OSPI Allowance	<u>130.00</u>	x	State Match %	<u>40.00%</u>	x	student factor	<u>0.101</u>	=	<u>\$0</u>	(high school)
TOTAL STATE MATCH CREDIT										=	<u>\$4,143</u>	

TAX PAYMENT CREDIT

(((1+ interest rate 2.45%) ^ 10 years to pay off bond) - 1] / [interest rate 2.45% x

(1 + interest rate 2.45%) ^ 10 years to pay off bond] x 0.00152 capital levy rate x

assessed value 485,760 tax payment credit = \$ 6,479

IMPACT FEE CALCULATION

SITE ACQUISITION COST	<u>\$1,276</u>
FACILITY CONSTRUCTION COST	<u>\$31,764</u>
RELOCATABLE FACILITIES COST (PORTABLES)	<u>\$449</u>
(LESS STATE MATCH CREDIT)	<u>(\$4,143)</u>
(LESS TAX PAYMENT CREDIT)	<u>(\$6,479)</u>
	<u></u>
	<u></u>

SINGLE FAMILY RES IDENTIAL FINAL IMPACT FEE PER UNIT	Non-Discounted	50% Discount
	\$22,867	\$11,434

IMPACT FEE WORKSHEET
LAKE STEVENS SCHOOL DISTRICT

MULTIPLE FAMILY RESIDENTIAL -- 1 BDRM OR LESS

SITE ACQUISITION COST

acres needed	<u>11.97</u>	x	<u>\$ 200,000</u>	/	<u>capacity (# students)</u>	<u>653</u>	x	student factor	<u>No data</u>	=	<u>\$0</u>	(elementary)
acres needed	<u>0</u>	x	<u>\$ 200,000</u>	/	<u>capacity (# students)</u>	<u>255</u>	x	student factor	<u>No data</u>	=	<u>\$0</u>	(middle)
acres needed	<u>0</u>	x	<u>\$ 200,000</u>	/	<u>capacity (# students)</u>	<u>29</u>	x	student factor	<u>No data</u>	=	<u>\$0</u>	(mid-high)
acres needed	<u>0</u>	x	<u>\$ 200,000</u>	/	<u>capacity (# students)</u>	<u>0</u>	x	student factor	<u>No data</u>	=	<u>\$0</u>	(high school)

TOTAL SITE ACQUISITION COST = \$0

SCHOOL CONSTRUCTION COST

total const. cost	<u>\$48,975,000</u>	/	<u>capacity (# students)</u>	<u>653</u>	x	student factor	<u>No data</u>	=	<u>\$0</u>	(elementary)
total const. cost	<u>\$22,950,000</u>	/	<u>capacity (# students)</u>	<u>255</u>	x	student factor	<u>No data</u>	=	<u>\$0</u>	(middle)
total const. cost	<u>\$0</u>	/	<u>capacity (# students)</u>	<u>29</u>	x	student factor	<u>No data</u>	=	<u>\$0</u>	(mid-high)
total const. cost	<u>\$0</u>	/	<u>capacity (# students)</u>	<u>0</u>	x	student factor	<u>No data</u>	=	<u>\$0</u>	(high school)

Subtotal \$0

Total Square Feet of Permanent Space (District) 969,077 / Total Square Feet of School Facilities (000) 1,046,133 = 92.63%

TOTAL FACILITY CONSTRUCTION COST = \$ -

RELOCATABLE FACILITIES COST (PORTABLES)

Portable Cost	<u>\$ 250,000</u>	/	<u>25</u>	facility size	x	student factor	<u>No data</u>	=	<u>\$0</u>	(elementary)
Portable Cost	<u>\$ 250,000</u>	/	<u>27</u>	facility size	x	student factor	<u>No data</u>	=	<u>\$0</u>	(middle)
Portable Cost	<u>\$ 250,000</u>	/	<u>27</u>	facility size	x	student factor	<u>No data</u>	=	<u>\$0</u>	(mid-high)
Portable Cost	<u>\$ 250,000</u>	/	<u>27</u>	facility size	x	student factor	<u>No data</u>	=	<u>\$0</u>	(high school)

Subtotal \$0

Total Square Feet of Portable Space (District) 77,056 / Total Square Feet of School Facilities (000) 1,046,133 = 7.37%

TOTAL RELOCATABLE COST ELEMENT = \$0

CREDIT AGAINST COST CALCULATION -- MANDATORY

STATE MATCH CREDIT

BOECKH Index	\$ 246.83	x OSPI Allowance	90	x	State Match %	40.00%	x	student factor	No data	=	\$0	(elementary)
BOECKH Index	\$ 246.83	x OSPI Allowance	117	x	State Match %	40.00%	x	student factor	No data	=	\$0	(middle)
BOECKH Index	No projects	x OSPI Allowance	117	x	State Match %	40.00%	x	student factor	No data	=	\$0	(mid-high)
BOECKH Index	No projects	x OSPI Allowance	130	x	State Match %	40.00%	x	student factor	No data	=	\$0	(high school)
TOTAL STATE MATCH CREDIT										=	\$0	

TAX PAYMENT CREDIT

[((1 + interest rate 2.45%) ^ 10 years to pay off bond) - 1] / [interest rate 2.45% x												
(1 + interest rate 2.45%) ^ 10 years to pay off bond] x 0.00152 capital levy rate												
assessed value	169,461	tax payment credit = \$ (2,260)										

IMPACT FEE CALCULATION

SITE ACQUISITION COST	\$0
FACILITY CONSTRUCTION COST	\$0
RELOCATABLE FACILITIES COST (PORTABLES)	\$0
(LESS STATE MATCH CREDIT)	\$0
(LESS TAX PAYMENT CREDIT)	(\$2,260)

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

IMPACT FEE WORKSHEET
LAKE STEVENS SCHOOL DISTRICT
MULTIPLE FAMILY RESIDENTIAL -- 2 BDRM OR MORE

SITE ACQUISITION COST

acres needed	<u>11.97</u>	x	<u>\$ 200,000</u>	/	capacity (# students)	<u>653</u>	x	student factor	<u>0.092</u>	=	<u>\$337</u>	(elementary)
acres needed	<u>0</u>	x	<u>\$ 200,000</u>	/	capacity (# students)	<u>255</u>	x	student factor	<u>0.031</u>	=	<u>\$0</u>	(middle)
acres needed	<u>0</u>	x	<u>\$ 200,000</u>	/	capacity (# students)	<u>29</u>	x	student factor	<u>0</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>0.023</u>	=	<u>\$0</u>	(high school)

TOTAL SITE ACQUISITION COST
=
\$337

SCHOOL CONSTRUCTION COST

total const. cost	<u>\$48,975,000</u>	/	capacity (# students)	<u>653</u>	x	student factor	<u>0.092</u>	=	<u>\$6,900</u>	(elementary)
total const. cost	<u>\$22,950,000</u>	/	capacity (# students)	<u>255</u>	x	student factor	<u>0.031</u>	=	<u>\$2,790</u>	(middle)
total const. cost	<u>\$0</u>	/	capacity (# students)	<u>29</u>	x	student factor	<u>0</u>	=	<u>\$0</u>	(mid-high)
total const. Cost	<u>\$0</u>	/	capacity (# students)	<u>0</u>	x	student factor	<u>0.023</u>	=	<u>\$0</u>	(high school)
									<u>\$9,690</u>	

Total Square Feet
of Permanent Space (District)

969,077

/ Total Square Feet
of School Facilities (000)

1,046,133

=

92.63%

TOTAL FACILITY CONSTRUCTION COST
=
\$ 8,976

RELOCATABLE FACILITIES COST (PORTABLES)

Portable Cost	<u>\$ 250,000</u>	/	<u>25</u>	facility size	x	student factor	<u>0.092</u>	=	<u>\$920</u>	(elementary)
Portable Cost	<u>\$ 250,000</u>	/	<u>27</u>	facility size	x	student factor	<u>0.031</u>	=	<u>\$287</u>	(middle)
Portable Cost	<u>\$ 250,000</u>	/	<u>27</u>	facility size	x	student factor	<u>0</u>	=	<u>\$0</u>	(mid-high)
Portable Cost	<u>\$ 250,000</u>	/	<u>27</u>	facility size	x	student factor	<u>0.023</u>	=	<u>\$213</u>	(high school)

Subtotal
\$1,420

Total Square Feet
of Portable Space (District)

77,056

/ Total Square Feet
of School Facilities (000)

1,046,133

=

7.37%

TOTAL RELOCATABLE COST ELEMENT
=
\$105

STATE MATCH CREDIT

TOTAL STATE MATCH CREDIT		=	<u>\$1,176</u>
--------------------------	--	---	----------------

[illegible]

SITE ACQUISITION COST	\$337
FACILITY CONSTRUCTION COST	\$8,976
RELOCATABLE FACILITIES COST (PORTABLES)	\$105
(LESS STATE MATCH CREDIT)	(\$1,176)
(LESS TAX PAYMENT CREDIT)	(\$3,191)

Capital Facilities Plan 2022-2027

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 2021-2027

School Type	Grade Level	School Year						
		2021	2022	2023	2024	2025	2026	2027
Elementary	K	813	750	767	783	800	817	834
	1	677	837	772	789	806	823	841
	2	695	692	855	789	806	823	841
	3	728	706	703	869	802	819	836
	4	725	739	717	714	883	815	832
	5	716	740	754	732	729	901	832
K-5 Headcount		4354	4464	4568	4676	4826	4998	5016
Middle	6	699	736	761	775	753	750	927
	7	727	705	743	768	782	760	757
6-7 Headcount		1426	1441	1504	1543	1535	1510	1684
Mid High	Grade 8	751	736	714	752	778	792	770
	Grade 9	773	746	731	709	747	772	786
8-9 Headcount		1524	1482	1445	1461	1525	1564	1556
Sr. High	Grade 10	703	763	736	722	700	737	762
	Grade 11	685	648	703	678	665	645	679
	Grade 12	633	662	626	680	655	643	623
10-12 Headcount		2021	2073	2065	2080	2020	2025	2064
K-12 Headcount		9325	9460	9582	9760	9906	10097	10320

Source: Snohomish County, Lake Stevens School District and OSPI

Table C-1
LAKE STEVENS SCHOOL DISTRICT
STUDENT ENROLLMENT BY GRADE SPAN 2021-2027

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K-12 Headcount		9325	9460	9582	9760	9906	10097	10320

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 (2022-2027) prepared by the State Office of the Superintendent of Public Instructions (OSPI) for use in the facilities plan. Whichever is used for the 2022-2027 planning period, OSPI does not forecast enrollments for Year 2044, so the Ratio Method is used for that purpose, regardless.

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	51,208	9,325	18.21%
2022	51,954	9,612	18.50%
2023	52,701	9,750	18.50%
2024	53,447	9,888	18.50%
2025	54,194	10,026	18.50%
2026	54,940	10,164	18.50%
2027	55,687	10,302	18.50%
2044	67,294	12,449	18.50%

The table above shows actual enrollments and population estimates from 2010-2021, 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 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 18.5%.

2044 Enrollment Estimate

The District's 2022 CFP ratio of 18.50% 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 12,449 students in 2044.

Appendix D

Student Generation Rates

Student Generation Rate Report

for the Lake Stevens School District

Date: April 28, 2022

Student Generation Rate Report

Prepared for

Robb Stanton

Executive Director, Operations – Lake Stevens School District

12309 22nd St NE, Lake Stevens, WA 98258

BlueLine Job No. 22-120

Prepared by: Chase Killebrew, AICP

Reviewed by: Eric Jensen

This report shows the estimated number of students for each grade that is typically generated by different dwelling unit types within the Lake Stevens School District (LSSD). These student generation rates (SGRs) assist in predicting future enrollment for the short-term and long-term planning horizons as development and redevelopment change the mix of housing types in the district. SGRs are also used in the school impact fee formula to determine the per dwelling unit cost of needed new school capacity.

This document describes the methodology used to calculate SGRs for the LSSD and provides the findings of those calculations. SGRs were calculated for two types of residential construction: single-family detached and multifamily. Manufactured homes are included in the single-family detached classification. Single-family attached units such as condominiums, townhomes, and multiplexes are included in the multifamily classification.

Electronic records were pulled from the Snohomish County Assessor's FTP Data Downloads webpage. The specific dataset titled *Improvement Records* was filtered to only contain residential development data from the past 5 years (2017 – 2021). This table was brought into ArcGIS. Using a shapefile of the LSSD boundary, all the records attached to parcels located within LSSD were selected, creating a new LSSD-specific table. The table was divided by single-family versus multifamily development. Then the multifamily list was divided by number of bedrooms, where all units containing 1 bedroom or less are grouped and units containing 2 or more bedrooms are grouped. No multifamily units containing 1 bedroom or less were found in this data. Also, no developments containing more units than a duplex (two units) were found in this data.

The School District provided BlueLine with student records data including the addresses and grade levels of all P2-12 students attending the Lake Stevens School District as of January 2022. This data containing 9,877 students was reformatted so the addresses matched the style of the LSSD Improvement Records address data.

There were 1,989 records indicating construction of new single-family detached units. These were cross-referenced and matched with the student records data, and the matches were tallied by grade level. The same was done for the 130 multifamily (2+ bedroom) records. The tables displaying the results are shown on the following page.

	SINGLE-FAMILY	MULTIFAMILY (0-1 BR)	MULTIFAMILY (2+ BR)	TOTAL
UNITS CONSTRUCTED IN LSSD (2017 - 2021)	1,989	0	130	2,119
NUMBER OF STUDENTS ATTENDING LAKE STEVENS SCHOOL DISTRICT	9,877			



SUMMARY OF STUDENT GENERATION RATES FOR LAKE STEVENS SCHOOL DISTRICT (2017 – 2021)

Single-family SGRs

GRADE(S)	COUNT OF MATCHES	CALCULATED RATE
P2	9	0.005
P3	13	0.007
P4	16	0.008
K1	148	0.074
1	111	0.056
2	107	0.054
3	109	0.055
4	110	0.055
5	108	0.054
6	100	0.050
7	81	0.041
8	100	0.050
9	79	0.040
10	82	0.041
11	62	0.031
12	56	0.028
P2 - P4	38	0.019
K1 - 5	693	0.348
6 - 7	181	0.091
8 - 9	179	0.090
10 - 12	200	0.101
K1 - 12	1,253	0.630

Multifamily (2+ BR) SGRs

GRADE(S)	COUNT OF MATCHES	CALCULATED RATE
P2	0	0.000
P3	0	0.000
P4	0	0.000
K1	1	0.008
1	1	0.008
2	1	0.008
3	5	0.038
4	3	0.023
5	1	0.008
6	1	0.008
7	3	0.023
8	0	0.000
9	0	0.000
10	2	0.015
11	1	0.008
12	0	0.000
P2 - P4	0	0.000
K1 - 5	12	0.092
6 - 7	4	0.031
8 - 9	0	0.000
10 - 12	3	0.023
K1 - 12	19	0.146

SGRs Summary Table

	P2 - P4	K1 - 5	6 - 7	8 - 9	10 - 12	K1 - 12
SINGLE-FAMILY	0.019	0.348	0.091	0.090	0.101	0.630
MULTIFAMILY (0-1 BR)	0.000	0.000	0.000	0.000	0.000	0.000
MULTIFAMILY (2+ BR)	0.000	0.092	0.031	0.000	0.023	0.146



Appendix E Board Resolution



Lake Stevens School District | 12309 22nd St. NE | Lake Stevens, WA 98256-9500
425-335-1500 (office) | 425-335-1549 (fax)

**RESOLUTION NO. 9-22
ADOPTION OF 2022-2027
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 2022-2027, 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 August 2022,

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



President



ATTEST:



Superintendent:

Our students will be contributing members of society and lifelong learners, pursuing their passions and interests in an ever-changing world.

Appendix F

Determination of Nonsignificance

DETERMINATION OF NONSIGNIFICANCE

Lake Stevens School District No. 4 Capital Facilities Plan 2022-2027

DESCRIPTION OF PROPOSAL: The proposed action is the adoption of the Lake Stevens School District No. 4 Capital Facilities Plan, 2022-2027. Board adoption is scheduled to occur on August 10, 2022. This Capital Facilities Plan has been developed in accordance with requirements of the State Growth Management Act and is a non-project proposal. It documents how the Lake Stevens School District utilizes its existing educational facilities given current district enrollment configurations and educational program standards and uses six-year enrollment projections to quantify capital facility needs for years 2022-2027.

PROPONENT: Lake Stevens School District No. 4

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

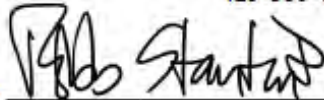
LEAD AGENCY: Lake Stevens School District No. 4

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 – July 14, 2022

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

2022-2027

Adopted: August 3, 2022

LAKEWOOD SCHOOL DISTRICT NO. 306

CAPITAL FACILITIES PLAN

2022-2027

BOARD OF DIRECTORS

CATHERINE “SANDY” GOTTS, PRESIDENT

LEAHA BOSER

DANA KRIEGER

STEVEN LARSON

LEAH TOCCO

SUPERINTENDENT

SCOTT PEACOCK

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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Appendix A	Population and Enrollment Data
Appendix B	Student Generation Factor Review
Appendix C	School Impact Fee Calculations

INTRODUCTION

A. Purpose of the Capital Facilities Plan

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

The Lakewood School District (the “District”) has prepared this Capital Facilities Plan (the “CFP”) to provide Snohomish County (the “County”) and the cities of Arlington and Marysville with a description of facilities needed to accommodate projected student enrollment and a schedule and financing program for capital improvements over the next six years (2022-2027).

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.

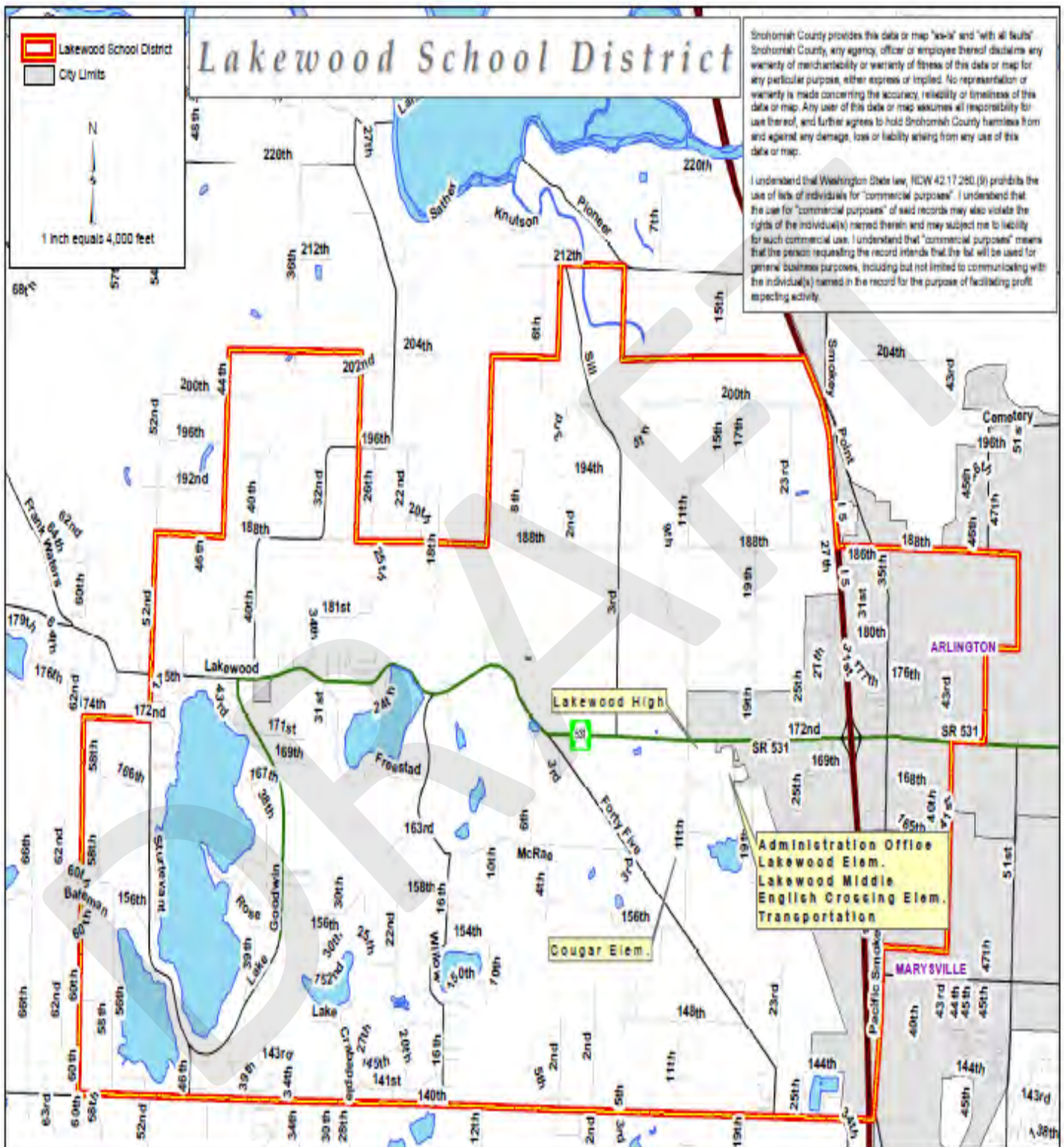
Snohomish County's Countywide Planning Policies direct jurisdictions in Snohomish County to "ensure the availability of sufficient land and services for future K-20 school needs." Policy ED-11. The District appreciates any opportunity for cooperative planning efforts with its jurisdictions.

B. Overview of the Lakewood School District

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

The District serves a student population of 2,574 (October 1, 2021, reported OSPI HC enrollment) with three elementary schools, one middle school, and one high school.

**FIGURE 1
MAP OF FACILITIES**



SECTION 2

DISTRICT EDUCATIONAL PROGRAM STANDARDS

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

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

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

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

Lakewood Elementary School (Preschool through 5th Grades)

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

English Crossing Elementary School (Kindergarten through 5th Grades)

- K through 5th Grade Special Education Resource Room Program
- Bilingual Education Program
- K – 5th Grade Counseling Services
- Speech and Language Disorder Therapy Program
- Developmentally Delayed Preschool Program - Ages 3 to 5
- Learning Assistance Program - Tutorial Services
- Occupational Therapy Program
- Special Education EBD Program

Cougar Creek Elementary School (Kindergarten through 5th Grades)

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

Lakewood Middle School (6th through 8th Grades)

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

Lakewood High School

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

Variations in student capacity between schools may result from the special or nontraditional programs offered at specific schools. Some students, for example, leave their regular classroom for a short period of time to receive instruction in these special programs. New schools are designed to accommodate many of these programs. However, existing schools often require space

modifications to accommodate special programs, and in some circumstances, these modifications may affect the overall classroom capacities of the buildings.

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

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

Educational Program Standards For Elementary Schools

- Class size for grades K – 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 self-contained or specialized classrooms.
- All students will be provided music instruction in a separate classroom.
- All students will have scheduled time in a computer lab. Each classroom will have access to computers and related educational technology.
- Optimum design capacity for new elementary schools is 475 students. However, actual capacity of individual schools may vary depending on the educational programs offered.
- All students will be provided physical education instruction in a gym/multipurpose room.

Educational Program Standards For Middle and High Schools

- Class size for middle school grades will not exceed 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.
- All students will have access to computer labs. Each classroom is equipped with access to computers and related educational-technology.
- Identified students will also be provided other nontraditional educational opportunities in classrooms designated as follows:
 - Counseling Offices
 - Resource Rooms (i.e. computer labs, study rooms)
 - Special Education Classrooms

Program Specific Classrooms (i.e. music, drama, art, physical education, Industrial Arts and Agricultural Sciences).

- Optimum design capacity for new middle schools is 600 students. However, actual capacity of individual schools may vary depending on the educational programs offered.
- Optimum design capacity for new high schools is 800 students. However, actual capacity of individual schools may vary depending on the educational programs offered.

Minimum Educational Service Standards

The District will evaluate student housing levels based on the District as a whole system and not on a school by school or site by site basis. This may result in portable classrooms being used as interim housing, attendance boundary changes or other program changes to balance student housing across the system as a whole. A boundary change or a significant programmatic change would be made by the Board of Directors following appropriate public review and comment. The District may also request that development be deferred until planned facilities can be completed to meet the needs of the incoming population; however, the District has no control over the ultimate land use decisions made by the permitting jurisdictions.

The District's minimum level of service ("MLOS") is as follows: on average, K-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 2019-20 and 2020-21, the District's compliance with the MLOS was as follows (with MLOS set as applicable for those school years):

2019-20 School Year						
LOS Standard	MINIMUM LOS# Elementary	REPORTED LOS Elementary	MINIMUM LOS Middle	REPORTED LOS Middle	MINIMUM LOS High	REPORTED LOS High
	26	18.86	28	26.08	30	22.59

2020-21 School Year						
LOS Standard	MINIMUM LOS# Elementary	REPORTED LOS Elementary	MINIMUM LOS Middle	REPORTED LOS Middle	MINIMUM LOS High	REPORTED LOS High
	26	18.17	28	23.11	30	22.88

* 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	22	444	2003
Lakewood	*	45,400	16	323	1958, 1997
TOTAL	*	131,047	58	1,170	

Middle School	Site Size (Acres)	Building Area (Square Feet)	Teaching Stations	Permanent Capacity	Year Built or Remodeled
Lakewood Middle	*	62,835	27	670	1971, 1994, 2002, 2022

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 15 relocatable classrooms at various school sites throughout the District to provide additional interim capacity. A typical relocatable classroom can provide capacity for a full-size class of students. Current use of relocatable classrooms throughout the District is summarized in Table 2. Table 2 includes only those relocatable classrooms used for regular capacity purposes. The District's relocatable classrooms have adequate useful remaining life and are evaluated regularly.

Table 2
Relocatable Classroom (Portable) Inventory

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

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	15	318
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C. Support Facilities

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

Table 3
Support Facility Inventory

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.

SECTION 4 STUDENT ENROLLMENT PROJECTIONS

The District's October 1, 2021, reported enrollment was 2,574 HC students (2,517.3 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 2,685 students are expected to be enrolled in the District by 2027, a slight increase from the October 2021 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 cohort method has not proven to be a reliable measure for the Lakewood School District. For example, the cohort projection in 2017 predicted that the District's October 2019 enrollment would be 2,423, about 91 fewer students than the actual October 2019 enrollment figures. The 2021 cohort projections for 2027 show a 4.3% projected increase by the 2027 school year. 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 2020, the District's student enrollment constituted approximately 14.58% of the total population in the District. Assuming that between 2022 and 2027, the District's enrollment will continue to constitute 14.58% of the District's total population and using OFM/County data, OFM/County methodology projects a total enrollment of 2,757 students in 2027, or an approximately 7.11% increase. See Appendix A-2.

The District obtained in 2022 an enrollment forecast from a professional demographer, FLO Analytics. Based on this analysis, a total enrollment of 2,791, or 274 additional students, are expected by the 2027-28 school year. This projection is an increase of approximately 10.9% over 2021 enrollment. Growth is projected at all three grade levels. The FLO Analytics forecast utilizes historic enrollment patterns, demographic and land use analysis based upon information from Snohomish County and the cities of Arlington and Marysville, census data, OFM forecasts, and Washington State Department of Health birth data. 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-3.

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

Table 4
Projected Student Enrollment (FTE)
2022-2027

Projection	Oct. 2021*	2022	2023	2024	2025	2026	2027	Change 2020-27	Percent Change 2010-27
OFM/County	2,574	2,604	2,635	2,666	2,696	2,727	2,757	183	7.11%
OSPI Cohort**	2,574	2,572	2,608	2,613	2,627	2,637	2,685	111	4.3%
District***	2,517	2,527	2,580	2,617	2,663	2,709	2,791	274	10.89%

* Actual reported enrollment, October 2021 (headcount for OFM/OSPI; FTE for District)

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

***FLO Analytics (2022) 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. Future updates to the Plan will continue to revisit enrollment projections and methodologies.

B. 2035 Enrollment Projections

Student enrollment projections beyond 2027 are highly speculative. Using OFM/County data as a base, the District projects a 2044 student HC population of 3,512. 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 2021	Projected Enrollment 2044*
Elementary (K-5)	1,145	1,562
Middle School (6-8)	584	797
High School (9-12)	845	1,153
TOTAL (K-12)	2,574	3,512

*Assumes average percentage per grade span remains constant between 2021 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 (2022-2027).

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 2021-22 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 2022-2027. 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***
2021-2027

Grade Span	2021**	2022-23	2023-24	2024-25	2025-26	2026-27	2027-28	Pct. Growth Related
Elementary (K-5)								
Total	0	0	12	40	35	77	80	
Growth Related	--	--	12	40	35	77	80	100%
Middle School (6-8)								
Total	0	0	0	0	5	0	28	
Growth Related	--	--	--	--	5	0	28	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 2021 Enrollment

***Additional “Growth Related Capacity Needs” equal the “Total” for each year less “deficiencies” existing as of 2021. Existing deficiencies as of 2021 include capacity needs related to recent growth from new development through that date.

By the end of the six-year forecast period (2027), 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)	80/(80)
Middle School (6-8)	28/(28)
High School (9-12)	-(-)
TOTAL UNHOUSED (K-12)	108/(108)

Again, planned construction projects are not included in the analysis in Table 6-B. In addition, it is not the District's policy to include relocatable classrooms when determining future capital facility needs; therefore interim capacity provided by relocatable classrooms is not included in Table 6-B. However, Table 6-C incorporates the District's current relocatable capacity (see Table 2) for purposes of identifying available capacity.

Table 6-C
Unhoused Students – Mitigated with Relocatables

Grade Span	2027 Unhoused Students /Growth Related in (Parentheses)	Relocatable Capacity
Elementary (K-5)	80/(80)	240
Middle School (6-8)	28/(28)	78
High School (9-12)	-(-)	0
Total (K-12)	108(108)	318

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 2027 are included in Table 7 and more fully described in Table 8.

Table 7
Projected Student Capacity
2022-2027

Elementary School Surplus/Deficiency

	Oct 2021*	2022	2023	2024	2025	2026	2027
Existing Capacity	1,170	1,170	1,170	1,170	1,170	1,170	1,170
Added Permanent Capacity							
Total Permanent Capacity	1,170	1,170	1,170	1,170	1,170	1,170	1,170
Enrollment`	1,135	1,149	1,182	1,210	1,205	1,247	1,250
Surplus (Deficiency)**	35	21	(12)	(40)	(35)	(77)	(80)

* Reported October 2021 FTE enrollment

** Does not include portable capacity

Middle School Surplus/Deficiency

	Oct 2021*	2022	2023	2024	2025	2026	2027
Existing Capacity	670	670	670	670	670	670	670
Added Permanent Capacity							
Total Permanent Capacity	670	670	670	670	670	670	670
Enrollment	584	589	631	647	675	661	698
Surplus (Deficiency)**	86	81	39	23	(5)	9	(28)

* Reported October 2021 FTE enrollment

**Does not include portable capacity.

High School Surplus/Deficiency

	Oct 2021*	2022	2023	2024	2025	2026	2027
Existing Capacity	850	850	850	850	850	850	850
Added Permanent Capacity							
Total Permanent Capacity	850	850	850	850	850	850	850
Enrollment	799	790	766	760	783	800	843
Surplus (Deficiency)**	51	60	84	90	67	50	7

* Reported October 2021 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 2022 in the space between Lakewood Middle School and Lakewood Elementary School to add K-5 interim capacity at LES. 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. The District is not planning for permanent capacity improvements as a part of this CFP update. Future updates to this CFP will identify updated plans and funding sources.

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.

2. State School Construction Assistance

State School Construction Assistance funds come from the Common School Construction Fund. The State deposits revenue from the sale of renewable resources from State school lands set aside by the Enabling Act of 1889 into the Common School Account. If these sources are insufficient to meet needs, the Legislature can appropriate General Obligation Bond funds or the Superintendent of Public Instruction can prioritize projects for funding. School districts may qualify for State School Construction Assistance funds for specific capital projects based on a prioritization system. The District is eligible for State School Construction Assistance Program (SCAP) funds for certain projects at the 58.28% funding percentage level. The District does not anticipate being eligible for SCAP funds for the projects planned in this CFP.

3. Impact Fees

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

4. Six Year Financing Plan

The Six-Year Financing Plan shown in Table 8 demonstrates how the District intends to fund new construction and improvements to school facilities for the years 2022-2027. 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	2022	2023	2024	2025	2026	2027	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	2022	2021	2022	2023	2024	2027	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 the following residential unit types: single family; multi-family/studio or 1-bedroom; and multi-family/2-bedroom or more.

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

B. Methodology and Variables Used to Calculate School Impact Fees

Impact fees are calculated utilizing the formula in the Snohomish County Impact Fee Ordinance. The resulting figures are based on the District’s cost per dwelling unit to purchase land for school sites, make site improvements, construct schools, and purchase/install relocatable facilities that add interim capacity needed to serve new development. A student factor (or student generation rate) is used to identify the average cost per dwelling unit by measuring the average number of students generated by each housing type (single-family dwellings and multi-family dwellings of one bedroom and two bedrooms or more). A description of the student factor methodology is contained in Appendix B. As required under the GMA, credits are applied in the formula to account for State School Construction Assistance funds to be reimbursed to the District and projected future property taxes to be paid by the dwelling unit. The costs of projects that do

not add capacity are not included in the impact fee calculations. Furthermore, because the impact fee formula calculates a “cost per dwelling unit”, an identical fee is generated regardless of whether the total new capacity project costs are used in the calculation or whether the District only uses the percentage of the total new capacity project costs allocated to the Districts growth-related needs, as demonstrated in Table 6-A. When calculating impact fees, the District uses the full project costs in the fee formula. Furthermore, impact fees will not be used to address existing deficiencies. See Table 8 for a complete identification of funding sources.

The 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

Average Site Cost/Acre

N/A

Student Generation Factors – Multi Family (1 Bdrm)

Elementary	.026
Middle	.000
High	.000
Total	.026

Temporary Facility Capacity

Capacity	20/26
Cost	\$250,000

State Match Credit

Current State Match Percentage	58.28% (not expected)
--------------------------------	--------------------------

Student Generation Factors – Multi Family (2+ Bdrm)

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

Construction Cost Allocation

Current CCA	246.83
-------------	--------

District Average Assessed Value

Single Family Residence	\$500,494
-------------------------	-----------

Projected Student Capacity per Facility

N/A

District Average Assessed Value

Multi Family (1 Bedroom)	\$169,461
--------------------------	-----------

Multi Family (2+ Bedroom)	\$239,226
---------------------------	-----------

Required Site Acreage per Facility

Facility Construction/Cost Average

N/A

SPI Square Footage per Student

Elementary	90
Middle	108
High	130

District Debt Service Tax Rate for Bonds

Current/\$1,000	\$1.32
-----------------	--------

Permanent Facility Square Footage

Elementary	131,047
Middle	62,835
High	169,000
Total	362,882

General Obligation Bond Interest Rate

Bond Buyer Index (avg February 2022)	2.45%
--------------------------------------	-------

Developer Provided Sites/Facilities

Value	0
Dwelling Units	0

Temporary Facility Square Footage

Elementary	6,656
Middle	512
High	3,584
Total	10,752

Total Facility Square Footage

Elementary	137,703
Middle	63,347
High	172,584
Total	373,634

C. *Proposed Lakewood School District Impact Fee Schedule*

The District does not have permanent capacity projects planned as a part of the 2022 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
Multi-Family (1 Bedroom)	\$0
Multi-Family (2+ Bedroom)	\$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 2016-2021
PROJECTED STUDENT ENROLLMENT 2022-2027
Based on OSPI Cohort Survival***



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

Snohomish/Lakewood(31306)

Grade	--- ACTUAL ENROLLMENTS ON OCTOBER 1st ---						AVERAGE % SURVIVAL	--- PROJECTED ENROLLMENTS ---					
	2016	2017	2018	2019	2020	2021		2022	2023	2024	2025	2026	2027
Kindergarten	162	175	178	188	128	189		170	171	171	171	171	171
Grade 1	159	176	179	183	191	156	107.43%	203	183	184	184	184	184
Grade 2	167	173	190	177	172	209	103.80%	162	211	190	191	191	191
Grade 3	227	174	166	194	184	188	103.09%	215	167	218	196	197	197
Grade 4	174	231	175	179	189	195	102.71%	193	221	172	224	201	202
Grade 5	182	177	223	173	181	208	101.65%	198	196	225	175	228	204
K-5 Sub-Total	1,071	1,106	1,111	1,094	1,045	1,145		1,141	1,149	1,160	1,141	1,172	1,149
Grade 6	181	192	186	235	176	194	104.97%	218	208	206	236	184	239
Grade 7	202	174	206	204	232	173	102.02%	198	222	212	210	241	188
Grade 8	187	206	185	213	216	217	102.22%	177	202	227	217	215	246
6-8 Sub-Total	570	572	577	652	624	584		593	632	645	663	640	673
Grade 9	199	176	217	192	229	216	102.14%	222	181	206	232	222	220
Grade 10	170	207	171	220	182	224	99.03%	214	220	179	204	230	220
Grade 11	179	173	203	174	208	188	99.88%	224	214	220	179	204	230
Grade 12	170	174	157	182	159	217	94.65%	178	212	203	208	169	193
9-12 Sub-Total	718	730	748	768	778	845		838	827	808	823	825	863
DISTRICT K-12 TOTAL	2,359	2,408	2,436	2,514	2,447	2,574		2,572	2,608	2,613	2,627	2,637	2,685

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

School Facilities and Organization

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Table A-2

**AVERAGE PERCENTAGE ENROLLMENT BY GRADE SPAN
(COUNTY/OFM Enrollment Projections)*****

Enrollment by Grade Span	Oct. 2021*	Avg. %age	2022	2023	2024	2025	2026	2027
Elementary (K-5)	1,145	44.48%	1,158	1,172	1,186	1,199	1,213	1,226
Middle School (6-8)	584	22.69%	591	598	605	612	619	626
High School (9-12)	845	32.83%	855	865	875	885	895	905
TOTAL**	2,574	100%	2,604	2,635	2,666	2,696	2,727	2,757

*Actual October 2021 HC Enrollment.

** Totals may vary due to rounding.

***Using average percentage by grade span.

Table A-3

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

Updated 6-Year Forecast (based on October 2021 FTE Enrollment)

Grade	2016	2017	2018	2019	2020	2021	2022	2023	2024	2025	2026	2027
K	162.00	174.40	177.15	185.72	127.02	186.60	183.17	192.32	184.18	179.10	175.02	183.17
1	159.00	176.00	177.72	182.27	189.08	154.32	193.71	190.59	200.58	192.53	187.64	183.80
2	166.45	172.03	190.00	177.00	171.56	205.77	162.42	204.34	201.50	212.55	204.48	199.74
3	226.05	174.00	166.00	194.00	183.09	187.89	215.85	170.77	215.34	212.83	225.00	216.95
4	174.00	230.30	174.36	179.00	189.00	195.38	195.70	225.35	178.69	225.84	223.72	237.06
5	182.00	177.00	222.27	173.00	181.00	204.56	198.04	198.84	229.50	182.41	231.08	229.45
6	181.00	190.60	186.00	232.92	175.91	195.00	214.39	207.87	209.02	241.62	192.34	244.03
7	202.00	174.00	205.55	203.19	230.90	173.00	199.17	219.32	212.98	214.50	248.34	197.99
8	187.00	206.00	185.00	213.00	214.72	216.08	175.10	203.94	224.92	218.77	220.67	255.88
9	198.40	175.20	216.52	191.54	229.00	216.28	220.69	180.80	212.88	234.95	228.70	230.86
10	168.80	205.20	170.52	219.09	182.00	220.04	215.22	215.39	180.20	212.34	234.55	228.49
11	165.00	152.60	179.82	154.76	190.73	176.22	199.21	195.02	195.35	163.58	192.92	213.29
12	144.60	152.80	126.27	141.69	134.84	186.16	154.68	175.02	171.49	171.94	144.11	170.11
K-5	1,069.50	1,103.73	1,107.50	1,090.99	1,040.75	1,134.52	1,148.89	1,182.20	1,209.78	1,205.25	1,246.95	1,250.16
6-8	570.00	570.60	576.55	649.11	621.53	584.08	588.66	631.13	646.93	674.89	661.34	697.90
9-12	676.80	685.80	693.13	707.08	736.57	798.70	789.80	766.23	759.91	782.81	800.28	842.75
K-12	2,316.30	2,360.13	2,377.18	2,447.18	2,398.85	2,517.30	2,527.35	2,579.56	2,616.63	2,662.94	2,708.57	2,790.81

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

Benjamin Maloney
Demographer/Data Analyst

Project No.: F1867.01.004

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
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
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
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 2022-2027 Capital Facilities Plan since the District is not requesting a school impact fee. Future updates to this CFP may include an impact fee.

MARYSVILLE SCHOOL DISTRICT NO. 25

CAPITAL FACILITIES PLAN

2022-2027



MARYSVILLE
SCHOOL DISTRICT

Engage. Inspire. Prepare.

Adopted: August 15, 2022

MARYSVILLE SCHOOL DISTRICT NO. 25

CAPITAL FACILITIES PLAN

2022-2027

BOARD OF DIRECTORS

Paul Galovin, President

Keira Atchley

Katie Jackson

Connor Krebbs

Wade Rinehart

Dr. Zachary Robbins, Superintendent

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Appendix B	School Impact Fee Calculations
Appendix C	Student Generation Rates

For information regarding the Marysville School District 2022-2027 Capital Facilities Plan, contact the Finance and Operations Department, Marysville School District No. 25, 4220 80th Street N.E., Marysville, Washington 98270-3498. Telephone: (360) 965-0094.

SECTION ONE: INTRODUCTION

Purpose of the Capital Facilities Plan

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

The Marysville School District (the “District”) has prepared this Capital Facilities Plan (the “CFP”) to provide Snohomish County (the “County”), the City of Marysville (the “City”), and the City of Everett (“Everett”) with a schedule and financing program for capital improvements over the next six years (2022-2027).

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

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

Overview of the Marysville School District

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

The District currently serves an approximate student population of 9,587 (February 1, 2021 FTE enrollment) with ten elementary schools, four middle level school, and four high schools (including two comprehensive high schools). For the purposes of facility planning, this CFP considers grades K-5 as elementary school, grades 6-8 as middle level school, and grades 9-12 as high school. The District also operates the Early Learning Center, housing ECEAP (Early Childhood Education and Assistance Program) as well as special education preschool programs.

The District has experienced enrollment declines in recent years, with the COVID-19 pandemic accelerating previously anticipated declines. The District intends to monitor enrollment particularly closely and will make adjustments as necessary should recent trends begin to change as the pandemic wanes, as growth continues in the District, and/or in response to any other circumstance influencing District enrollment. While the District is not requesting school impact fees as a part of this CFP update, this scenario could change as student enrollment growth changes. Future updates to the CFP will include relevant information.

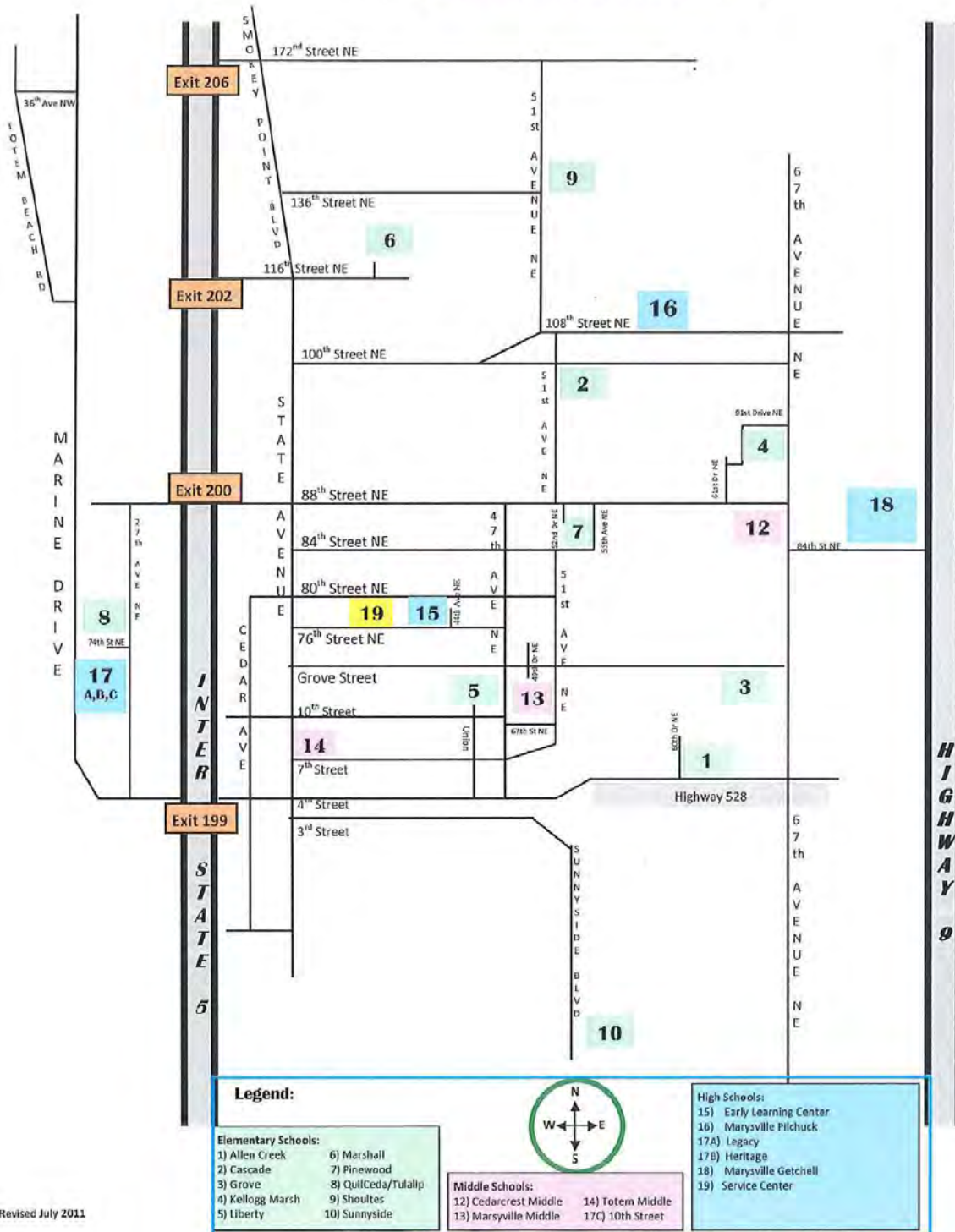
Facilities and Capacity Needs

The District encounters a variety of issues that affect the capital facilities planning process. Historically, affordable housing (as compared to Seattle and adjacent cities) in the District tended to draw young families, which puts demands on the school facilities. The 2005 amendments to the Snohomish County Comprehensive Plan expanded the Marysville urban growth boundary to include an additional 560.4 acres zoned for residential development. Also, a significant amount of acreage already within the Marysville UGA was rezoned to accommodate more density in housing developments. Initially, there was little housing growth in the Marysville School District boundaries. Between 2017 and 2021, single family permit activity started to pick up, as well as some activity, though at lower numbers, in multi-family unit development. The District is watching this pipeline carefully so that it may make adjustments as necessary should new

development planning start to shift toward more expected residential development within the District.

In February of 2006, the District's voters approved a school construction bond for approximately \$118 million. The bond helped to pay for the construction of Marysville Getchell High School and Grove Elementary School. The District also used the bond proceeds to acquire future school sites. In 2014, District voters approved a \$12 million technology (and a replacement levy was approved in 2018). The District presented a \$120 million capital levy measure to the voters in February 2020 to fund school safety and security improvements and to rebuild Cascade and Liberty Elementary Schools. The District failed to receive sufficient votes for approval of the capital levy proposal. There are no currently anticipated bond or capital levy proposals. The District's Board of Directors will evaluate the scope and timing of future proposals.

Welcome to the Marysville School District No. 25



Revised July 2011

SECTION 2 -- EDUCATIONAL PROGRAM STANDARDS

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

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

District educational program standards may change in the future as a result of changes in the program year, special programs class sizes, grade span configurations, and use of new technology, as well as other physical aspects of the school facilities. The State Legislature's requirements for full-day kindergarten and reduced K-3 class size impact school capacity and educational program standards. The District has implemented full-day kindergarten classes and K-3 class size reduction. The school capacity inventory will be reviewed periodically and adjusted for any changes to the educational program standards. These changes will also be reflected in future updates of this CFP.

Within the context of this topic, there are at least three methodologies that can be applied to capacity forecasting. Those include a maximum class size based on contractual obligations, a maximum class size target, and a minimum service level.

The District has internal targets, which predicate staffing decisions. These internal targets are the District's preferred capacity levels. In comparison, class size based on a maximum number of students is predicated on contractual language in the contract with the Marysville Education Association. This contract specifies a maximum number of students in a classroom above which the District must fund additional classroom assistance. Finally, the minimum service level represents the capacity level that the District will not exceed. This is determined by an average maximum number of students in a classroom by grade (for K-8 classes) or by a course of study (for the 9-12 grade level). For example, grade 8 may have an average class size (and minimum level of service) of 32 students. Some classrooms might have less than 32 students and some classrooms might have more than 32 students; however the average of grade 8 classrooms district-wide will not exceed 32 students. At the secondary school level, some classes will exceed 34 students (band, physical education, etc.). This minimum service level is defined for core classes and is an average of all core classes for the secondary level. Table 1 compares class size methodologies.

Table 1
Class Size Methodologies

Grade Level	District Targets	Maximum (Per Contract)	Minimum Service Level
Kindergarten	17	24	27
Grades 1 – 3	17	24	27
Grades 4 – 5	25	27	30
Grades 6 – 8	25	30	32
Grades 9 – 12	25	30	34

Educational Program Standards Based Upon Internal Targets

Elementary Schools:

- Average class size for Kindergarten should not exceed 17 students.
- Average class size for grades 1-3 should not exceed 17 students.
- Average class size for grades 4-5 should not exceed 25 students.
- Special education for students may be provided in regular classes when inclusion is possible and in self-contained classrooms when this is the most appropriate option available.

Middle and Junior High Schools:

- Average class size for grades 6-8 should not exceed 25 students.
- It is not possible to achieve 100% utilization of all regular teaching stations throughout the day. Therefore, classroom capacity is adjusted using a utilization factor of available teaching stations depending on the physical characteristics of the facility and program needs.
- Special education for students may be provided in regular classes when inclusion is possible and in self-contained classrooms when this is the most appropriate option available.
- Identified students will also be provided other programs in “resource rooms (i.e., computer labs, study rooms), and program specific classrooms (i.e., music, drama, art, home and family education).

High Schools:

- Average class size for grades 9-12 should not exceed 25 students.
- It is not possible to achieve 100% utilization of all regular teaching stations throughout the day. Therefore, classroom capacity is adjusted using a utilization factor of available teaching stations depending on the physical characteristics of the facility and program needs.

- Special education for students may be provided in regular classes when inclusion is possible and in self-contained classrooms when this is the most appropriate option available.
- Identified students will also be provided other programs in “resource rooms (i.e., computer labs, study rooms), and program specific classrooms (i.e., music, drama, art, home and family education).

For the school years of 2019-20 and 2020-21, the District’s compliance with the minimum educational service standards was as follows (with MLOS set as applicable for those school years):

2019-20 School Year						
LOS Standard	MINIMUM LOS# Elementary	REPORTED LOS Elementary	MINIMUM LOS Middle	REPORTED LOS Middle	MINIMUM LOS High	REPORTED LOS High
	29	23.87	32	25.42	34	21.04

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

2020-21 School Year						
LOS Standard	MINIMUM LOS# Elementary	REPORTED LOS Elementary	MINIMUM LOS Middle	REPORTED LOS Middle	MINIMUM LOS High	REPORTED LOS High
	29	22.17	32	25.04	34	21.07

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

SECTION THREE: CAPITAL FACILITIES INVENTORY

Under the GMA, public entities are required to inventory capital facilities used to serve existing development. The purpose of the facilities inventory is to establish a baseline for determining what facilities will be required to accommodate future demand (student enrollment) at acceptable levels of service. This section provides an inventory of capital facilities owned and operated by the District including schools, relocatable classrooms (portables), undeveloped land, and support facilities. School facility capacity was inventoried based on the space required to accommodate the District's adopted educational program standards. *See Section Two: Educational Program Standards.* A map showing locations of District facilities is provided on page 4.

Schools

See *Section One and Two* for a description of the District's schools and programs.

School capacity was determined based on the number of teaching stations within each building and the space requirements of the District's adopted educational program and internal targets. It is this capacity calculation that is used to establish the District's baseline capacity, and to determine future capacity needs based on projected student enrollment. The school capacity inventory is summarized in Tables 2, 3, and 4. In addition to the school capacity inventory identified in these tables, the District operates the Early Learning Center (ECEAP program and special education preschool programs).

Relocatable Classrooms (Portables)

Relocatable classrooms (portables) are used as interim classroom space to house students until funding can be secured to construct permanent classrooms. The District currently uses 60 relocatable classrooms at various school sites throughout the District to provide additional interim capacity. A typical relocatable classroom can provide capacity for a full-size class of students. Current use of relocatable classrooms throughout the District is summarized in Table 5.

Table 2
Elementary School Inventory

<i>Elementary School</i>	<i>Site Size (Acres)</i>	<i>Building Area (sq ft)</i>	<i>Teaching Stations*</i>	<i>Permanent Capacity**</i>
Allen Creek	11.0	47,594	21.0	412
Cascade	9.5	38,923	21.0	412
Grove	6.2	54,000	24.0	470
Kellogg Marsh	12.8	47,816	21.0	412
Liberty	9.1	40,459	20.0	392
Marshall	13.7	53,063	14.0	274
Pinewood	10.5	40,073	17.0	333
Quil Ceda	10.0	47,594	27.0	529
Shoultes	9.5	40,050	16.0	314
Sunnyside	10.4	39,121	22.0	431
<i>TOTAL</i>	102.7	448,693	203	3,979

* Teaching Station Definition: A space designated as a classroom. Other stations include spaces designated for special education and pull-out programs.

** Regular classrooms; includes reduced K-3 class size.

Table 3
Middle Level School Inventory

<i>Middle Level School</i>	<i>Site Size (Acres)</i>	<i>Building Area (sq ft)</i>	<i>Teaching Stations*</i>	<i>Permanent Capacity**</i>
Cedarcrest	27.0	83,128	29.0	725
Marysville Middle	21.0	99,617	32.0	800
Marysville Tulalip Campus*** (6-8)	***	15,000	7.0	175
Totem	15.2	124,822	30.0	750
<i>TOTAL</i>	63.2	322,567	98	2,450

* Teaching Station Definition: A space designated as a classroom. Other stations include spaces designated for special education and pull-out programs.

** Regular classrooms.

***The Marysville Tulalip Campus includes the following schools co-located on one campus: Legacy High School, Heritage High School, and the 10th Street School. Grades 6-12 are served at the Marysville Tulalip Campus. The above chart identifies information relevant to grades 6-8.

Table 4
High School Inventory

<i>High School</i>	<i>Site Size (Acres)</i>	<i>Building Area (sq ft)</i>	<i>Teaching Stations*</i>	<i>Permanent Capacity**</i>
Marysville Pilchuck	83.0	259,033	56.0	1,400
Marysville Getchell	38.0	193,000	61.0	1,525
Marysville Tulalip Campus*** (9-12)	39.4	70,000	19.0	475
<i>TOTAL</i>	160.4	522,033	136	3,400

* Teaching Station Definition: A space designated as a classroom. Other stations include spaces designated for special education and pull-out programs.

** Regular classrooms.

***The Marysville Tulalip Campus includes the following schools co-located on one campus: Legacy High School, Heritage High School, and the 10th Street School. Grades 6-12 are served at the Marysville Tulalip Campus. The above chart identifies information relevant to grades 9-12.

Table 5
Relocatable Classroom (Portable) Inventory*

<i>Elementary School</i> [^]	<i>Relocatables</i> **	<i>Other Relocatables</i> ***	<i>Interim Capacity</i>
Allen Creek	7	0	137
Cascade	3	2	59
Kellogg Marsh	5	2	98
Liberty	6	2	118
Marshall	3	3	59
Pinewood	3	4	59
Quil Ceda	4	4	78
Shoultes	5	3	98
Sunnyside	4	5	78
<i>SUBTOTAL</i>	40	25	784

<i>Middle Level School</i>	<i>Relocatables</i> **	<i>Other Relocatables</i> ***	<i>Interim Capacity</i>
Cedarcrest	11	2	275
Marysville Middle	7	2	175
Marysville Tulalip Campus	0	0	0
Totem	0	0	0
<i>SUBTOTAL</i>	18	4	450

<i>High School</i>	<i>Relocatables</i> **	<i>Other Relocatables</i> ***	<i>Interim Capacity</i>
Marysville-Getchell	0	0	0
Marysville-Pilchuck	1	0	25
Marysville Tulalip Campus	1	1	25
<i>SUBTOTAL</i>	2	1	50

<i>TOTAL</i>	60	30	1,284
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* Each portable is 600 square feet. The District's relocatable facilities identified above have adequate useful remaining life and are evaluated regularly.

**Used for regular classroom capacity.

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

[^]Four portables are located at the Early Learning Center (on the Marysville Tulalip Campus) and used for pre-kindergarten/early learning instruction. These portables are not available for regular K-5 capacity.

Support Facilities

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

Table 6
Support Facility Inventory

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

Land Inventory

The District owns a number of undeveloped sites. An inventory of these sites is provided in Table 7.

Table 7
Undeveloped Site Inventory

<i>Site</i>	<i>Site Size (Acres)</i>
152nd Street Site	35.02
84 th Street NE Site – Parcel 0500	4.5
84 th Street NE Site – Parcel 0300	27.75
84 th Street NE Site - Parcel 0700	30.40

Development on some of these sites may be restricted due to significant wetlands, limited site sizes, high utility costs, and/or inappropriate locations. In addition to these sites, the District owns one site of less than two acres that is currently under contract for sale.

SECTION FOUR: STUDENT ENROLLMENT TRENDS AND PROJECTIONS

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

For this year's CFP update, the District considered several sources for enrollment projections. See Appendix A.

- The Office of the Superintendent of Public Instruction (OSPI) prepares six year projections based upon the cohort survival method. Using this methodology, a total of 8,531 (headcount) students are expected to be enrolled in the District by 2027, a decrease from the October 2021 headcount enrollment of 9,897. The projected decline reflects the District's experience in recent years of declining enrollment growth at all grade levels (though predominantly at the elementary school level). Notably, the cohort survival method does not anticipate changing development patterns, so it may not capture new development from increased (or decreased) residential construction activity and as anticipated in the Snohomish County/OFM projections. Also, the cohort projections do not consider the impact of anomalies in enrollment, such as the COVID-19 pandemic and its effects on enrollment during the last two years. As such, the OSPI projections are only reliable in school districts with little to no variation in enrollment patterns.
- The District in May of 2019 received a modified enrollment forecast from a professional demographer, William L. (Les) Kendrick, Ph.D. The Kendrick analysis utilized historic enrollment patterns, demographic and land use analysis based upon information from Snohomish County and the City of Marysville, census data, Snohomish County/OFM forecasts and trends, and Washington State Department of Health birth data, all as current as of early 2019. The low range projection of the Kendrick analysis show a total enrollment of 10,532 expected by the 2027-28 school year. However, the 2019 Kendrick projections were performed prior to the pandemic and also do not reflect updated birth rate and development information. In view of current enrollment data and information, the District believes that the 2019 Kendrick projections are optimistic.
- The District reviewed the population-based enrollment projection estimated for the District using OFM population forecasts for Snohomish County. The County provided the District with the estimated total population in the District by year. Using 2020 census data, the District's student enrollment constituted approximately 12.93% of the total population in the District. Assuming that between 2022 and 2027, the District's enrollment will continue to constitute 12.93% of the District's total population and using OFM/County data, OFM/County methodology projects a total enrollment of 10,502 in 2027.

- The District prepares its own enrollment forecast for internal planning purposes. This forecast is based on recent trends in enrollment, information relevant to the current planning year, current birth rate data, and known development information. The District's projections factor in up to date and key information relative to the District's expectation of student enrolment in the near future including (1) the pandemic's effect on District enrollment, including analysis of students returning to in-person learning as based on February 2022 counts, and (2) recent Snohomish County birth rate data, which declined between 2016 and 2020. The District's projections are also the only projections that use a true full-time equivalent count, more reflective of District facilities planning. Using these projections, the District anticipates flat enrollment through the six year planning period, with total student enrollment of 9,245 by 2027.

The comparison of the projected enrollment under each methodology is contained in Table 8.

Table 8
Projected Student Enrollment**
2022-2027

Projection	2021*	2022	2023	2024	2025	2026	2027	Actual Change	Percent Change
OFM/County	9,897	9,905	10,025	10,145	10,265	10,385	10,502	717	7.33%
OSPI Cohort	9,897	9,724	9,486	9,289	9,043	8,737	8,531	(1,366)	(13.8)%
District (Kendrick)	9,897	10,113	10,141	10,256	10,335	10,373	10,532	635	6.42%
District (Internal Analysis)	9,785	9,245	9,245	9,245	9,245	9,245	9,245	(540)	(5.52)%

*Actual October 2021 Headcount for all but District's internal analysis, which uses actual October 2021 FTE enrollment; note that February 2022 FTE enrollment dropped to 9,587

**All projections, with the exception of the District's Internal Analysis use a headcount enrollment assumption. The District finds that a full-time equivalent analysis is more appropriate for assessing facility needs.

Based upon the immediate dynamics of the District, as discussed above, the District has chosen to follow the District's own internal analysis for purposes of this CFP update. The District will closely monitor enrollment and, if actual enrollment notably shifts from the projections, will update the CFP accordingly.

2044 Enrollment Projections

Student enrollment projections beyond 2027 and to the future are highly speculative. Assuming that the District's enrollment will continue to constitute 12.93% of the District's population through 2044, and assuming that the ratio of students in each grade level stays constant, the projected enrollment by grade span *based upon the County/OFM projections* is as follows:

Table 9
Projected FTE Student Enrollment – County/OFM
2044

<i>Grade Span</i>	<i>Projected FTE Enrollment</i>
Elementary (K-5)	5,571
Middle Level School (6-8)	2,917
High School (9-12)	3,668
<i>TOTAL (K-12)</i>	12,156

Again, these estimates are highly speculative given current information and the length of the planning period. The District will continue to monitor enrollment growth and make appropriate adjustments in future updates to the CFP.

SECTION FIVE: CAPITAL FACILITIES PROJECTIONS FOR FUTURE NEEDS

Projected available student capacity was derived by subtracting projected student enrollment from existing school capacity (excluding relocatable classrooms) for each of the six years in the forecast period (2022-2027). Capacity needs are expressed in terms of “unhoused students”

Table 10 identifies the District’s current permanent capacity needs (based upon information contained in Table 12):

Table 10
Unhoused Students – Based on October 2021 Enrollment/Capacity

<i>Grade Span</i>	<i>Unhoused Students/(Available Capacity</i>
Elementary Level (K-5)	(415)
Middle Level (6-8)	--
High School Level (9-12)	--

Assuming no permanent capacity additions or adjustments, Table 11 identifies the additional permanent classroom capacity that will be needed in 2027:

Table 11
Unhoused Students – 2027

<i>Grade Span</i>	<i>Unhoused Students/(Available Capacity</i>
Elementary Level (K-5)	(277)
Middle Level (6-8)	--
High School Level (9-12)	--

Interim capacity provided by relocatable classrooms is not included, though the District expects to continue to use relocatable classrooms to provide for a portion of the capacity needs. Relocatables may be moved from one grade level to another grade level as needed for capacity. (Information on relocatable classrooms by grade level and interim capacity can be found in Table 5.)

The District has no currently planned construction projects during this six-year planning period. Future updates to this CFP will include any identified projects.

Table 12 - Projected Student Capacity

Elementary School -- Surplus/Deficiency

	21-22*	2022	2023	2024	2025	2026	2027
Existing Permanent Capacity	3,979	3,979	3,979	3,979	3,979	3,979	3,979
Permanent Capacity Change	0	0	0	0	0	0	0
Total Permanent Capacity**	3,979	3,979	3,979	3,979	3,979	3,979	3,979
Enrollment	4,394	4,256	4,256	4,256	4,256	4,256	4,256
Permanent Capacity Surplus (Deficiency)**	(415)	(277)	(277)	(277)	(277)	(277)	(277)

*Actual February 2022 FTE enrollment

**Does not include relocatable capacity.

Middle School Level -- Surplus/Deficiency

	21-22*	2022	2023	2024	2025	2026	2027
Existing Permanent Capacity	2,450	2,450	2,450	2,450	2,450	2,450	2,450
Permanent Capacity Change	0	0	0	0	0	0	0
Total Permanent Capacity**	2,450	2,450	2,450	2,450	2,450	2,450	2,450
Enrollment	2,236	2,116	2,116	2,116	2,116	2,116	2,116
Permanent Capacity Surplus (Deficiency)**	214	334	324	334	334	334	334

*Actual February 2022 enrollment

**Does not include relocatable capacity.

High School Level -- Surplus/Deficiency

	21-22*	2022	2023	2024	2025	2026	2027
Existing Permanent Capacity	3,400	3,400	3,400	3,400	3,400	3,400	3,400
Permanent Capacity Change	0	0	0	0	0	0	0
Total Permanent Capacity**	3,400	3,400	3,400	3,400	3,400	3,400	3,400
Enrollment	2,744	2,675	2,675	2,675	2,675	2,675	2,675
Permanent Capacity Surplus (Deficiency)**	656	725	725	725	725	725	725

*Actual February 2022 enrollment

**Does not include relocatable capacity.

SECTION SIX: FINANCING PLAN

Planned Improvements

At the present time, the District does not have specific plans to construct new permanent capacity during the six-year planning period. The District may, as needed purchase and site new portable facilities to address capacity needs. The District intends to monitor closely enrollment and capacity needs and will update the CFP in the future as appropriate.

Financing for Planned Improvements

Where applicable, funding for planned improvements is typically secured from a number of sources including voter-approved bonds, State match funds, and impact fees.

General Obligation Bonds/Capital Levies: Bonds are typically used to fund construction of new schools and other capital improvement projects, and require a 60% voter approval. Capital levies require a 50% voter approval and can be used for certain capital improvement projects. The District presented a \$120 million capital levy in February 2020 to the voters to fund safety/security upgrades and to replace Cascade and Liberty elementary schools. The levy failed to reach the required threshold for approval. Future updates to the CFP will include information related to future bond planning and projects.

State School Construction Assistance Funds: State School Construction Assistance funds come from the Common School Construction Fund. The State deposits revenue from the sale of renewable resources from State school lands set aside by the Enabling Act of 1889 into the Common School Account. If these sources are insufficient to meet needs, the Legislature can appropriate General Obligation Bond funds or the Superintendent of Public Instruction can prioritize projects for funding. School districts may qualify for State School Construction Assistance funds for specific capital projects based on a prioritization system. The District is eligible for State School Construction Assistance funds for certain projects at the 61.87% funding percentage level.

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

The Six-Year Financing Plan shown on Table 13 demonstrates how the District intends to fund new construction and improvements to school facilities for the years 2022-2027. The financing components include bonds, State School Construction Assistance funds, and impact fees. The Financing Plan separates projects and portions of projects which add capacity from those which do not, since the latter are generally not appropriate for impact fee funding. As previously stated, with the exception of portable purchases, the District currently does not plan to construct new permanent capacity projects within the six-year planning period.

Table 13 - Capital Facilities Financing Plan

Improvements Adding Permanent Capacity (Costs in Millions)**

Project	2022	2023	2024	2025	2026	2027	Total Cost	Bonds/ Local Funds	Projected State Funds	Impact Fees
Elementary										
Middle School										
High School										
Portables			\$0.118	\$0.118			\$0.360	X		

**Growth-related

Improvements Not Adding New Permanent Capacity (Costs in Millions)

Project	2022	2023	2024	2025	2026	2027	Total Cost	Bonds/ Levies	Projected State Funds	Impact Fees
Elementary										
Middle										
High School										
District-wide										

SECTION SEVEN: SCHOOL IMPACT FEES

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

School Impact Fees in Snohomish County and the City of Marysville

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

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

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

The City of Marysville also adopted a school impact fee program consistent with the Growth Management Act in November 1998 (with subsequent amendments).

Methodology Used to Calculate School Impact Fees

Impact fees are calculated utilizing the formula in the Snohomish County Code and the Municipal Code for the City of Marysville. Where applicable, the resulting figures are based on the District’s cost per dwelling unit to purchase land for school sites, make site improvements, construct schools, and purchase/install relocatable facilities (portables), all as related to growth needs. As required

under the GMA, credits are applied in the formula to account for State School Construction Assistance Funds to be reimbursed to the District and projected future property taxes to be paid by the dwelling unit.

When an impact fee is calculated, the District's cost per dwelling unit is derived by multiplying the cost per student by the applicable student generation rate per dwelling unit. The student generation rate is the average number of students generated by each housing type -- in this case, single family dwellings and multi-family dwellings. Pursuant to the Snohomish County and the City of Marysville School Impact Fee Ordinances, multi-family dwellings are separated into one-bedroom and two-plus bedroom units. The District does not request school impact fees from the City of Everett as the portion of the District within City of Everett boundaries is largely undevelopable.

The District, for information purposes only, conducted a student generation study for this CFP even though it is not requesting school impact fees. The result of that report are included in Appendix C. Future updates to this CFP, where impact fees are requested, will include an updated student generation rate study.

Proposed Marysville School District Impact Fee Schedule for Snohomish County and the City of Marysville

The District does not have capacity projects planned as a part of the 2022 CFP. See discussion in Section 6 above. As such, the District is not requesting the collection of impact fees as a part of this Capital Facilities Plan. The District expects that future project planning and stabilization of enrollment will lead to a renewed request for impact fees in future updates to the Capital Facilities Plan.

**Table 12
School Impact Fees
2022**

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

FACTORS FOR ESTIMATED IMPACT FEE CALCULATIONS

Student Generation Factors – Single Family

Elementary	.263
Middle	.079
Senior	.086
Total	.428

Average Site Cost/Acre

N/A

Student Generation Factors – Multi Family (1 Bdrm)

Elementary	.000
Middle	.000
Senior	.000
Total	.000

Temporary Facility Capacity

Capacity
Cost

State School Construction Assistance

Current Funding Percentage 61.87%

Student Generation Factors – Multi Family (2+ Bdrm)

Elementary	.083
Middle	.117
Senior	.100
Total	.300

Construction Cost Allocation

Current CCA 246.83

District Average Assessed Value

Single Family Residence \$449,490

Projected Student Capacity per Facility

N/A

District Average Assessed Value

Multi Family (1 Bedroom) \$169,461

District Average Assessed Value

Multi Family (2+ Bedroom) \$239,336

Required Site Acreage per Facility

N/A

SPI Square Footage per Student

Elementary	90
Middle	108
High	130

Facility Construction Cost

N/A

District Property Tax Levy Rate (Bonds)

Current/\$1,000 \$0.81496

Permanent Facility Square Footage

Elementary	448,693
Middle	322,567
Senior	522,033
Total	1,293,293

General Obligation Bond Interest Rate

Current Bond Buyer Index 2.45%
(2/22 average)

Developer Provided Sites/Facilities

Value	0
Dwelling Units	0

Temporary Facility Square Footage

Elementary	39,000
Middle	13,200
Senior	1,800
Total	54,000

Total Facility Square Footage

Elementary	487,693
Middle	335,767
Senior	523,833
Total	1,347,293

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



ICOS

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

Snohomish/Marysville(31025)

Grade	--- ACTUAL ENROLLMENTS ON OCTOBER 1st ---						AVERAGE % SURVIVAL	--- PROJECTED ENROLLMENTS ---					
	2016	2017	2018	2019	2020	2021		2022	2023	2024	2025	2026	2027
Kindergarten	836	808	788	810	683	757		706	684	663	641	620	599
Grade 1	859	877	810	781	714	740	100.14%	758	707	685	664	642	621
Grade 2	781	867	891	797	738	736	99.69%	738	756	705	683	662	640
Grade 3	942	765	863	853	769	740	97.99%	721	723	741	691	669	649
Grade 4	897	940	782	834	802	792	99.12%	733	715	717	734	685	663
Grade 5	810	889	945	770	795	771	97.90%	775	718	700	702	719	671
K-5 Sub-Total	5,125	5,146	5,079	4,845	4,501	4,536		4,431	4,303	4,211	4,115	3,997	3,843
Grade 6	802	779	848	897	765	777	96.71%	746	750	694	677	679	695
Grade 7	766	800	779	838	866	735	98.23%	763	733	737	682	665	667
Grade 8	788	759	791	756	823	863	98.57%	724	752	723	726	672	655
6-8 Sub-Total	2,356	2,338	2,418	2,491	2,454	2,375		2,233	2,235	2,154	2,085	2,016	2,017
Grade 9	840	815	744	777	760	814	99.81%	861	723	751	722	725	671
Grade 10	890	824	814	754	791	763	100.29%	816	863	725	753	724	727
Grade 11	747	798	705	657	661	735	87.30%	666	712	753	633	657	632
Grade 12	739	722	752	674	654	674	97.59%	717	650	695	735	618	641
9-12 Sub-Total	3,216	3,159	3,015	2,862	2,866	2,986		3,060	2,948	2,924	2,843	2,724	2,671
DISTRICT K-12 TOTAL	10,697	10,643	10,512	10,198	9,821	9,897		9,724	9,486	9,289	9,043	8,737	8,531

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

School Facilities and Organization

Printed Feb 23, 2022

Low Range Projection

Marysville Enrollment History

	<u>2004</u>	<u>2005</u>	<u>2006</u>	<u>2007</u>	<u>2008</u>	<u>2009</u>	<u>2010</u>	<u>2011</u>	<u>2012</u>	<u>2013</u>
County Births	8675	8924	9070	9570	9795	9237	9001	8925	9226	9406
% of Cohort	10.2%	9.5%	9.4%	9.4%	9.5%	8.8%	9.4%	9.4%	8.8%	8.4%
City of Marysville	648	716	808	846	877	849	847	860	864	893
K % of City Cohort	136.3%	118.9%	105.8%	106.1%	106.4%	95.3%	100.1%	97.3%	93.5%	88.4%

	<u>Oct-09</u>	<u>Oct-10</u>	<u>Oct-11</u>	<u>Oct-12</u>	<u>Oct-13</u>	<u>Oct-14</u>	<u>Oct-15</u>	<u>Oct-16</u>	<u>Oct-17</u>	<u>Oct-18</u>
K	883	851	855	898	933	809	848	837	808	789
1	859	890	861	830	903	957	771	859	878	810
2	871	843	879	860	848	891	952	781	867	891
3	904	846	830	857	844	848	874	942	764	863
4	886	899	858	834	824	827	838	897	939	782
5	917	874	885	844	834	816	843	810	889	945
6	879	891	853	845	830	802	775	802	779	848
7	851	859	903	874	855	826	793	767	799	779
8	866	831	852	895	843	866	812	791	759	791
9	881	852	838	876	919	864	895	842	815	744
10	874	892	900	854	905	926	860	892	825	815
11	849	862	842	821	793	828	828	753	802	706
12	<u>980</u>	<u>987</u>	<u>943</u>	<u>900</u>	<u>877</u>	<u>874</u>	<u>796</u>	<u>746</u>	<u>723</u>	<u>756</u>
Total	11500	11377	11299	11188	11208	11134	10885	10719	10647	10519

Change	-165	-123	-78	-111	20	-74	-249	-166	-72	-128
% Change	-1.4%	-1.1%	-0.7%	-1.0%	0.2%	-0.7%	-2.2%	-1.5%	-0.7%	-1.2%

K-5	5320	5203	5168	5123	5186	5148	5126	5126	5145	5080
6-8	2596	2581	2608	2614	2528	2494	2380	2360	2337	2418
9-12	3584	3593	3523	3451	3494	3492	3379	3233	3165	3021

Low Range Projection

	<i>Projected Births</i>									
	<u>2014</u>	<u>2015</u>	<u>2016</u>	<u>2017</u>	<u>2018</u>	<u>2019</u>	<u>2020</u>	<u>2021</u>	<u>2022</u>	<u>2023</u>
County Births	9524	9766	10045	9877	10034	10124	10062	10088	10114	10142
K % of Cohort	8.6%	8.5%	8.7%	8.7%	8.7%	9.1%	9.1%	9.1%	9.1%	9.1%
City of Marysville	885	901	956	962	961	963	965	969	968	971
K % of City Cohort	92.2%	92.0%	91.9%	89.8%	91.3%	96.0%	95.3%	95.1%	95.4%	95.5%

	<u>Oct-19</u>	<u>Oct-20</u>	<u>Oct-21</u>	<u>Oct-22</u>	<u>Oct-23</u>	<u>Oct-24</u>	<u>Oct-25</u>	<u>Oct-26</u>	<u>Oct-27</u>	<u>Oct-28</u>
K	816	829	879	864	878	925	919	922	924	926
1	796	813	826	876	862	880	928	922	924	927
2	803	784	813	828	882	870	889	937	931	933
3	867	782	766	796	814	869	858	876	923	917
4	847	867	785	770	803	824	879	868	886	934
5	767	830	852	773	761	796	817	872	861	879
6	894	722	784	806	734	725	759	779	831	821
7	833	878	712	774	799	730	721	755	774	826
8	759	813	860	698	762	789	721	712	746	765
9	792	760	814	861	698	765	792	723	715	748
10	728	775	746	800	849	691	757	784	716	707
11	701	626	668	645	695	740	602	659	683	623
12	<u>658</u>	<u>654</u>	<u>584</u>	<u>623</u>	<u>604</u>	<u>652</u>	<u>694</u>	<u>565</u>	<u>618</u>	<u>641</u>
	10251	10132	10087	10113	10141	10256	10335	10373	10532	10648

Change	-268	-119	-45	26	27	116	79	37	159	116
% Change	-2.6%	-1.2%	-0.4%	0.3%	0.3%	1.1%	0.8%	0.4%	1.5%	1.1%

K-5	4886	4904	4920	4906	4999	5165	5290	5396	5449	5517
6-8	2486	2413	2355	2278	2295	2244	2201	2245	2351	2411
9-12	2879	2815	2812	2929	2846	2847	2845	2731	2732	2719

APPENDIX B

SCHOOL IMPACT FEE CALCULATIONS

This section is not updated for the 2022-2027 Capital Facilities Plan since no Impact Fee is requested. Future updates to this CFP may include an Impact Fee.

APPENDIX C

STUDENT GENERATION RATES (SGR)

Student Generation Rate Report

for the Marysville School District

Date: March 7, 2022

Student Generation Rate Report

Prepared for

Peggy King

Finance & Operations Analyst – Marysville School District

4220 80th St NE, Marysville, WA 98270

Blueline Job No. 22-038

Prepared by: Chase Killebrew, AICP

Reviewed by: Eric Jensen

This report shows the estimated number of students for each grade that is typically generated by different dwelling unit types within the Marysville School District (MSD). These student generation rates (SGRs) assist in predicting future enrollment for the short term and long-term planning horizons as development and redevelopment change the mix of housing types in the district. SGRs are also used in the school impact fee formula to determine the per dwelling unit cost of needed new school capacity.

This document describes the methodology used to calculate SGRs for the MSD and provides the findings of those calculations. SGRs were calculated for two types of residential construction: single-family detached and multifamily. Manufactured homes are included in the single-family detached classification. Single-family attached units such as condominiums, townhomes, and multiplexes are included in the multifamily classification.

Electronic records were pulled from the Snohomish County Assessor's FTP Data Downloads webpage. The specific dataset titled *Improvement Records* was filtered to only contain residential development data from the past 5 years (2017 – 2021). This table was brought into ArcGIS. Using a shapefile of the MSD boundary, all the records attached to parcels located within MSD were selected, creating a new MSD-specific table. The table was divided by single-family versus multifamily development. Then the multifamily list was divided by number of bedrooms, where all units containing 1 bedroom or less are grouped and units containing 2 or more bedrooms are grouped. No multifamily units containing 1 bedroom or less were found in this data. Also, no developments containing more units than a quadplex (four units) were found in this data.

The School District provided Blueline with student records data including the addresses and grade levels of all P2-12 students attending the Marysville School District as of January 2022. This data containing 10,682 students was reformatted so the addresses matched the style of the MSD Improvement Records address data.

There were 681 records indicating construction of new single-family detached units. These were cross-referenced and matched with the student records data, and the matches were tallied by grade level. The same was done for the 60 multifamily (2+ bedroom) records. The tables showing the results are shown on the following page.

	SINGLE-FAMILY	MULTIFAMILY (0-1 BR)	MULTIFAMILY (2+ BR)	TOTAL
UNITS CONSTRUCTED IN MSD (2017 - 2021)	687	0	60	747
NUMBER OF STUDENTS ATTENDING MARYSVILLE SCHOOL DISTRICT	10,682			



SUMMARY OF STUDENT GENERATION RATES FOR MARYSVILLE SCHOOL DISTRICT (2017 – 2021)

Single-family SGRs

GRADE(S)	COUNT OF MATCHES	CALCULATED RATE
P2	4	0.006
P3	6	0.009
P4	5	0.007
K1	26	0.038
1	36	0.052
2	27	0.039
3	24	0.035
4	30	0.044
5	23	0.033
6	17	0.025
7	17	0.025
8	20	0.029
9	16	0.023
10	15	0.022
11	16	0.023
12	12	0.017
P2 - 5	181	0.263
6 - 8	54	0.079
9 - 12	59	0.086
P2 - 12	294	0.428

Multifamily (2+ BR) SGRs

GRADE(S)	COUNT OF MATCHES	CALCULATED RATE
P2	0	0.000
P3	0	0.000
P4	0	0.000
K1	0	0.000
1	2	0.033
2	1	0.017
3	0	0.000
4	1	0.017
5	1	0.017
6	2	0.033
7	1	0.017
8	4	0.067
9	0	0.000
10	1	0.017
11	4	0.067
12	1	0.017
P2 - 5	5	0.083
6 - 8	7	0.117
9 - 12	6	0.100
P2 - 12	18	0.300

SGRs Summary Table

	P2 - 5	6 - 8	9 - 12	P2 - 12
SINGLE-FAMILY	0.263	0.079	0.086	0.428
MULTIFAMILY (0-1 BR)	0.000	0.000	0.000	0.000
MULTIFAMILY (2+ BR)	0.083	0.117	0.100	0.300





MONROE SCHOOL DISTRICT

CAPITAL FACILITIES PLAN 2022–2027

Adopted: August 8, 2022

CAPITAL FACILITIES PLAN MONROE SCHOOL DISTRICT NO. 103

BOARD OF DIRECTORS

Jennifer Bumpus, President
Jeremiah Campbell, Vice President
Molly Barnes
Sarah Johnson
Chuck Whitfield

SUPERINTENDENT

Carl Bruner, Acting Superintendent

For information regarding the Monroe School District Capital Facilities Plan, contact Victor Scarpelli, Executive Director of Support Services, 14692 179th Avenue SE, Monroe, WA 98272. Telephone: (360) 804-2570.

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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 (2022-2027). 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 5,488 (October 1, 2021, adjusted enrollment) with five elementary school campuses, two middle schools, and one high school. Leaders in Learning, an individualized secondary program, is also offered as a standalone program at the 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. Sky Valley Education Center and Leaders in Learning student enrollment figures are included in both the District and OSPI figures. Elementary schools provide educational programs for students in kindergarten through grade five. Middle schools serve grades six through eight and the high school grades nine through twelve. Leaders in Learning serves grades nine through twelve.

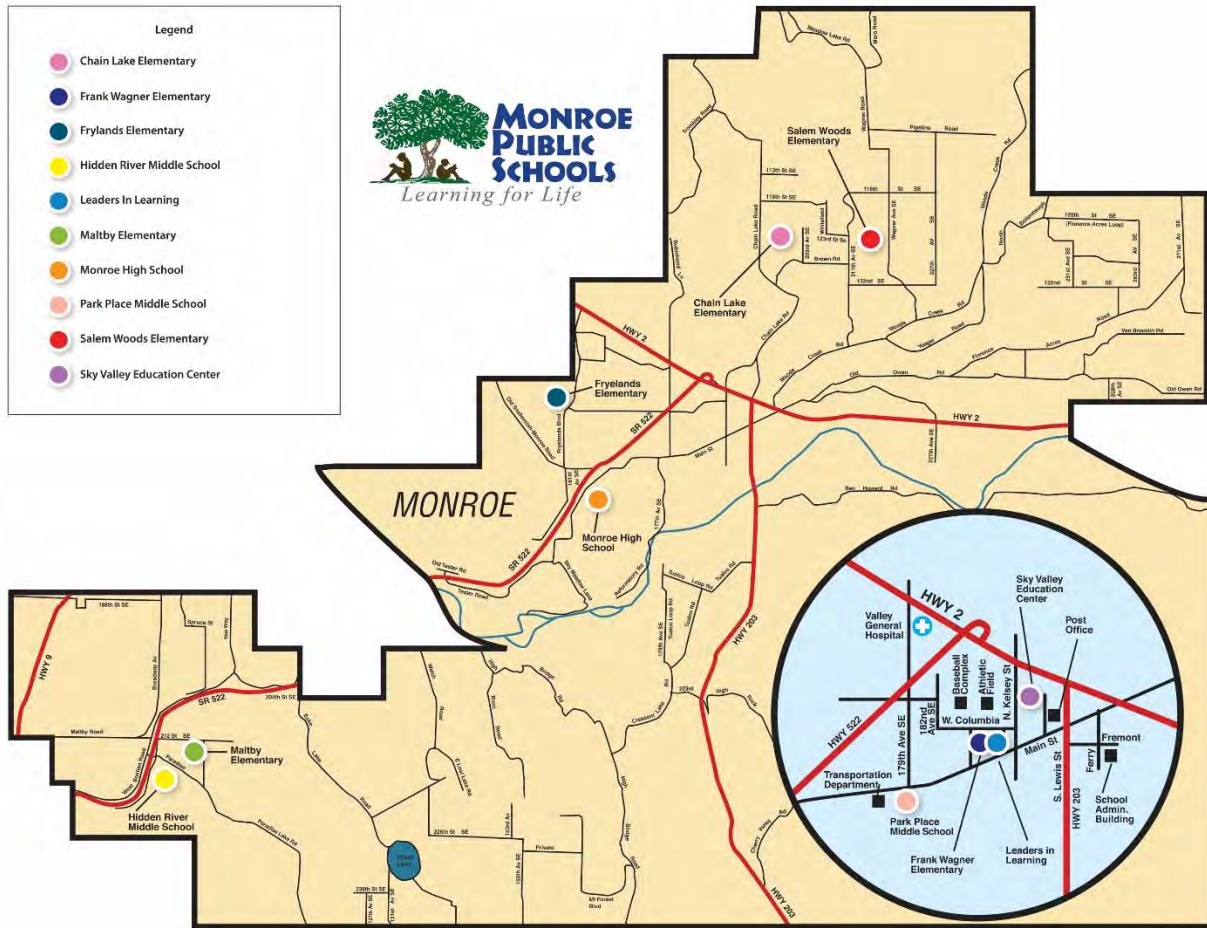
The District provides fiscal and administrative support for the Youth Re-Engagement program housed off-site at Everett Community College (EvCC) in Everett, Washington. It also provides a graduate retrieval program through Shoreline Community College (SCC). These programs do not use District facilities and are therefore the enrollment needs are not included when determining the District's facility needs. The District will discontinue the fiscal and administrative support relationships with EvCC and SCC at the end of the 2021-22 school year. The District previously operated WAVA High School, a virtual high school for students in grades 9-12. The District recently discontinued the WAVA program. The WAVA program did not use District facilities. The District has modified its past enrollment figures to exclude actual enrollment for the WAVA High School, the SCC graduate retrieval program, and EvCC U-3 program enrollment figures from the District's FTE enrollment figures.

Significant Issues Related To Facility Planning In the Monroe School District

The most significant issues facing the Monroe School District in terms of providing classroom capacity to accommodate projected demands are aging school facilities, the rate of student growth, the availability and affordability of suitable school sites, including perkable soil for septic systems, access to water and the geographic constraints associated with the increased student population. In addition, enrollment fluctuations due to the COVID-19 pandemic make it difficult to predict the rate at which enrollment may return to pre-pandemic levels as more students return to in-person learning.

The District is near completion of 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 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



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 2022 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 2019-20 and 2020-21, the District’s compliance with the minimum level of service was as follows:

2019-20 School Year						
LOS Standard	MINIMUM LOS# Elementary	REPORTED LOS Elementary	MINIMUM LOS Middle	REPORTED LOS Middle	MINIMUM LOS High	REPORTED LOS High
	27	20.33	30	19.73	30	21.13

* 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.

2020-21 School Year						
LOS Standard	MINIMUM LOS# Elementary	REPORTED LOS Elementary	MINIMUM LOS Middle	REPORTED LOS Middle	MINIMUM LOS High	REPORTED LOS High
	27	17.73	30	19.05	30	20.45

* The District determines the reported service level by adding the number of students at each grade level and dividing that number by the number of teaching stations.

CHAPTER 3 – CAPITAL FACILITIES INVENTORY

Under the Growth Management Act public entities are required to inventory capital facilities used to serve existing development. The purpose of the facilities inventory is to establish a baseline for determining what facilities will be required to accommodate future demand (student enrollment) at acceptable or established levels of service. This chapter provides an inventory of capital facilities owned and operated by the District including schools, relocatable classrooms (portables), undeveloped land and support facilities. School facility capacity was inventoried based on the space required to accommodate the District's adopted educational program standards (see Chapter 2). A map showing locations of District facilities is provided on page 3.

SCHOOLS

The Monroe School District currently operates five elementary school campuses serving grades K-5 including a portion of Wagner Center, formerly Frank Wagner Elementary East as a part of the Frank Wagner Elementary complex, two middle schools serving grades 6-8 and one high school serving grades 9-12. Leaders in Learning, an individualized secondary program is offered in 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.

The U3 Program and a graduate retrieval program through Shoreline Community College do not require District housing.

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

Table 1 - Elementary School Capacity Inventory

	Site Size (acres)	Building Area (Sq. Ft.)	Teaching Stations	Program Student Capacity	Year Built or Last Remodel	Potential for Expansion
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	2021	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	7	176	1980	yes
SVEC (part) ***		21,440	7	209	1980	no
Totals	33	245,122	86	2,200		

* Calculated at 90% room utilization

** Leaders in Learning located in a portion of the Wagner Center

*** Sky Valley Ed Center capacities prorated by daily usage.

RELOCATABLE CLASSROOM FACILITIES (PORTABLES)

Relocatable classroom facilities (portables) are used as interim classroom space to house students until construction of permanent classroom facilities takes place. Therefore, these facilities are not included in the school capacity calculations provided in Tables 1-3 above. The District uses 30 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
Sky Valley Ed. Ctr	2	0	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
	30	468	24,915

* Two portables for Life Skills; four 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.

The District will need additional schools in the area north of Highway 2 to meet long-range needs associated an increasing population in this area. Sites for schools north of Highway 2 should be purchased while property may still be available. The District also may need to acquire property for elementary expansion needs.

CHAPTER 4 – STUDENT ENROLLMENT HISTORY AND PROJECTIONS

Facility needs are determined in part by evaluating recent trends in adjusted student enrollment. The District's October 2021 adjusted enrollment was 5,488. This figure does not include students participating in U-3 or CEO/LCN programs¹ because those programs do not use District facilities. It also does not include out of district special education students. Future enrollment in these programs is expected to remain steady over the next six years. Notably, the OSPI enrollment reports and cohort projections incorporate enrollment data for both students enrolled in programs using District facilities and not using District facilities. (See Appendix A.) For purposes of this CFP and determining facility needs and anticipated enrollment projections, the District uses enrollment data for only those in-District students enrolled in programs using District facilities.

RECENT TRENDS - STUDENT ENROLLMENT IN DISTRICT FACILITIES

In looking at recent trends and for purposes of comparing past enrollment to future projections, the District treated Kindergarten enrollment as a 1.0 FTE since the District has implemented full-day Kindergarten. This provides a one to one comparison from year to year. Again, the recent enrollment trends consider only those students enrolled in District facilities. Over the previous six years, the District's enrollment peaked in 2016-17 after several years of growth but has declined in the last three years, with the last two years of enrollment heavily affected by enrollment fluctuations due to the COVID-19 pandemic and uncertainties with regard to in-person learning. Table 6 shows the actual student enrollment in District facilities during the years 2014-2021.

**Table 6- Total Student Enrollment
Monroe School District 2014-2021
(Adjusted FTE in District Facilities)**

Enrollment by Grade Span	2014-15	2015-16	2016-17	2017-18	2018-19	2019-20	2020-21	2021-22
Elementary (K-5)	2,893	2,922	2,930	2,889	2,857	2,806	2,447	2,411
Middle School (6-8)	1,462	1,450	1,457	1,422	1,464	1,460	1,410	1,298
High School (9-12)	1,942	1,938	1,934	1,941	1,815	1,817	1,759	1,779
TOTAL	6,297	6,310	6,321	6,252	6,136	6,083	5,616	5,488

¹ U3 and CEO/LCN programs are both off site credit retrieval programs to allow student to complete their high school education. These are provided by two separate community colleges in cooperation with the District. Students are enrolled through the District in cooperation with the college but do not attend at the Districts facilities.

PROJECTED STUDENT ENROLLMENT (2022-2027)

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 post-pandemic, is expected to bring new enrollment growth at the K-5 level over the six year planning period.

Two enrollment forecasts were conducted for the District: a modified cohort survival projection prepared by a professional demographer and an estimate based upon County population as provided by OFM (“ratio method”).

Enrollment projections often rely on the cohort survival methodology as a base. That methodology compares enrollment at a particular grade in a specific year, to the enrollment at the previous grade from the prior year. For example, enrollment at the second grade is compared to the previous year’s first grade enrollment. The ratio of these two numbers (second grade enrollment divided by first grade enrollment) creates a “cohort survival ratio” providing a summary measure of the in-and-out migration that has occurred over the course of a year. This ratio can be calculated for each grade level. Once these ratios have been established over a period of years they can be averaged and/or weighted to predict the enrollment at each grade. At the kindergarten level, enrollment is compared to the county births from five years prior to estimate a “birth-to-k” ratio. This ratio, averaged over several years, provides a method for predicting what proportion of the birth cohort will enroll at the kindergarten level.

Cohort survival is a purely mathematical method, which assumes that future enrollment patterns will be similar to past enrollment patterns. It makes no assumptions about what is causing enrollment gains or losses and can be easily applied to any enrollment history. 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 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. Those projections

show an expected total enrollment of 5,746, or increase of 4.7%, by 2027. Enrollment after 2027 is expected to continue to grow. See *Appendix A* for more detail.

OFM population-based enrollment projections were estimated for the District using OFM population forecasts for the County. The County provided the District with the estimated total population in the District by year. In 2020, the District's housed student enrollment constituted approximately 13.7% of the total population in the District. Assuming that between 2022 and 2027, the District's enrollment will continue to constitute 13.7% of the District's total population and using OFM/County data, OFM/County methodology projects a total enrollment of 6,006 students in District facilities in 2027.

**Table 7- Projected Student Enrollment
2022-2027
(FTE in District Facilities)**

Projection	Oct. 2021*	2022	2023	2024	2025	2026	2027	Change 2021-27	Percent Change 2021-27
OFM/County	5,488	5,574	5,660	5,746	5,832	5,918	6,006	518	9.44%
Modified Cohort/District	5,488	5,555	5,586	5,714	5,680	5,665	5,746	258	4.7%

*Actual adjusted FTE in District facilities, October 2021

For the reasons discussed above, the District is using the modified cohort survival projections for purposes of planning for the District's facility needs during the six years of this plan period. Future updates to the Plan may revisit this issue.

PROJECTED STUDENT ENROLLMENT (POST-2027)

Student enrollment projections beyond 2027 are highly speculative. Using OFM/County data as a base, the District projects a 2044 student FTE population of 6,443. This is based on the OFM/County data showing that, for the year 2020, the District's enrollment constituted approximately 13.7% 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	FTE Enrollment – October 2021	Projected Enrollment 2044*
Elementary (K-5)	2,411	2,830
Middle School (6-8)	1,298	1,524
High School (9-12)	1,779	2,089
TOTAL (K-12)	5,488	6,443

*Assumes average percentage per grade span remains constant between 2021 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 2027)

Current enrollment at each grade level is identified in Table 6 which provides the actual enrollment in District facilities as of October 1, 2021. *Projected* available student capacity was derived by subtracting projected FTE student enrollment from existing October 2021 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 included².

To determine future facility needs, existing school program capacity was compared to projected enrollment throughout the six-year forecast period. Without the consideration of portables, the District currently has capacity available at all grade levels (see Table 11). Table 9 assumes no new capacity construction through 2027. 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 2022-2027.

Table 9
Available Student Capacity 2021-2027

Grade Span	2021 Enrollment	Existing Permanent Capacity[^]	2021 Surplus	2027 Enrollment	2027 Surplus/(Deficit)
K-5	2,411	2,882	471	2,935	(53)
6-8	1,298	1,745	447	1,203	542
9-12	1,779	2,200	421	1,608	592

[^]Existing as of Oct. 2021.

² Information on portables and interim capacity can be found in Table 4.

CHAPTER 6 – CAPITAL FACILITIES FINANCING PLAN

NEW SCHOOL CONSTRUCTION

In April 2015, the District’s voters passed a \$110.9 million bond issue for school construction to modernize and expand existing facilities and provide Districtwide improvements and major maintenance. The District is currently in the planning stages for an anticipated bond proposal to add capacity during the six years of this planning period, as further detailed herein. The identified future bond project proposals are subject to the District’s Board of Directors deciding, via resolution, to send the proposal to the voters for consideration. The school construction projects are summarized in Table 10. The primary source of funding for these projects is from the bond proceeds and supplemented by State School Construction Assistance funds and impact fees.

Elementary Level Projects

Approved 2015 Bond Projects:

Salem Woods Elementary: Add new capacity for 132 students, with associated spaces additions at Salem Woods Elementary, along with modernization of the existing facility to bring it up to current building code and educational standards. Project complete in 2018.

Frank Wagner Elementary: Add new capacity for 308 students and construct a new library and computer lab. Project complete in 2018.

Anticipated Future Bond Projects:

Salem Woods Elementary Phase II: Add new capacity for 88 students. Project projected to be complete in 2027 (assuming bond approval).

Frank Wagner Elementary: Add new capacity for 88 students as a part of modernization project. Project projected to be complete in 2027 (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 2027-28 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 2021.

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 (with the exception of portable facilities).

The District anticipates that it will enter into bond planning during the six year planning period and identify a proposed bond 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 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 49.91% funding percentage level.

Impact Fees

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

Six Year Financing Plan

The Six-Year Financing Plan shown in Table 10 demonstrates how the District intends to fund new construction and improvements to school facilities for the years 2022-2027. The financing components include bond funds, impact fees, and school construction assistance funds. Projects and portions of projects which remedy existing deficiencies are not appropriate for impact fee funding. Thus, impact fees will not be used to finance projects or portions of projects which do not add capacity or which remedy existing deficiencies. See Chapter 5.

Alternative Actions

In the event that planned construction projects are not funded as expected or do not fully address space needs for student growth, the Board could consider various courses of action, including, but not limited to:

- Alternative scheduling options;
- 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 2027-26*)

Project	2022	2023	2024	2025	2026	2027	Total Cost	Bond/ Local**	State Match	Impact Fees
Elementary School										
Proposed Salem Woods Expansion					\$3.740	\$3.000	\$6.744	X	X	X
Proposed Frank Wagner Expansion					\$3.185	\$2.000	\$5.185	X	X	X
Proposed Chain Lake Elementary Expansion					\$7.750	\$6.000	\$13.750	X	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 2027-26*)

Project	2022	2023	2024	2025	2026	2027	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.

Table 11
Capacity Analysis (2022-2027)

Elementary School Surplus/Deficiency

	2021	2022	2023	2024	2025	2026	2027
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	2,411*	2,508	2,608	2,699	2,760	2,854	2,935
Surplus (Deficiency)	471	374	274	183	122	28	123

*Actual adjusted enrollment in District facilities as of October 2021.

^^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 2027 or shortly thereafter.

Middle School Surplus/Deficiency

	2021	2022	2023	2024	2025	2026	2027
Existing Capacity	1,745	1,745	1,745	1,745	1,745	1,745	1,745
Added Capacity							
Total Capacity	1,745	1,745	1,745	1,745	1,745	1,745	1,745
Enrollment	1,298*	1,251	1,213	1,256	1,252	1,202	1,203
Surplus (Deficiency)	447	1,620	532	489	493	543	542

*Actual adjusted enrollment in District facilities as of October 2021.

High School Surplus/Deficiency

	2021	2022	2023	2024	2025	2026	2027
Existing Capacity	2,200	2,200	2,200	2,200	2,200	2,200	2,200
Added Capacity							
Total Capacity	2,200	2,200	2,200	2,200	2,200	2,200	2,200
Enrollment	1,779*	1,796	1,764	1,760	1,667	1,608	1,608
Surplus (Deficiency)	421	404	436	440	533	592	592

*Actual adjusted enrollment in District facilities as of October 2021.

See Chapter 4 for complete breakdown of enrollment projections.

See Table 9 for a comparison of additional capacity needs due to growth versus existing deficiencies.

CHAPTER 7 – SCHOOL IMPACT FEES

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

SCHOOL IMPACT FEES IN SNOHOMISH COUNTY

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

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

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

METHODOLOGY AND VARIABLES USED TO CALCULATE SCHOOL IMPACT FEES

Impact fees are calculated utilizing the formula in the Snohomish County Impact Fee Ordinance. The resulting figures are based on the District’s cost per dwelling unit to, as applicable, purchase land for school sites, make site improvements, construct schools, and purchase/install relocatable facilities that add interim capacity needed to serve new development.

A student factor (or student generation rate) is used to identify the average cost per dwelling unit by measuring the average number of students generated by each housing type (single family dwellings, multi-family dwellings of one bedroom or less, and multi-family dwellings of two bedrooms or more). The District obtained updated student factors in 2022. See Appendix B (including a description of the student factor methodology). The District, in its impact fee calculations, has removed the pre-kindergarten student generation rate from the elementary student generation rate (which decreases the calculated rate from 0.187 to 0.184).

The multi-family 2+ bedroom student factor analysis has fluctuated over the last several years. Beginning in 2016 and continuing in 2022, the District’s student generation analysis identified a high number of students being generated from multi-family 2+ bedroom units. This trend was particularly evident at the K-5 level where elementary students residing in new multi-family 2+ bedroom units notably exceeds the number of elementary students residing in new single family units. This year’s analysis identified a limited number of new multi-family 2+ bedroom units constructed within the District during the study period and therefore may not provide for a reliable data set. As such, the District has chosen to calculate Multi-Family 2+ BR student generation rates using the countywide average* of the corresponding rates published in the 2020 capital facilities plans (the last County-adopted set of plans) of the other school districts in Snohomish County. These averages reflect recent development trends in Snohomish County which will likely influence any multi-family construction that occurs in the District in the near term. 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 resulting average student generation rates are as follows:

Multi-Family 2+ BR Rates	K-5	6-8	9-12
	0.108	0.058	0.078

*Excluding certain anomalies of districts with high multi-family rates (Monroe, Mukilteo, and Lake Stevens).

The District plans to continue to closely monitor the student generation from multi-family 2+ bedroom units and will update the CFP accordingly.

As required by the GMA, credits are applied in the formula to account for State School Construction Assistance Funds (where expected) to be reimbursed to the District and projected future property taxes to be paid by the dwelling unit toward a capital levy/bond funding the capacity improvement. The costs of projects that do not add capacity are not included in the impact fee calculations. Furthermore, because the impact fee formula calculates a “cost per dwelling unit”, an identical fee is generated regardless of whether the total new capacity project costs are used in the calculation or whether the District only uses the percentage of the total new capacity project costs allocated to the Districts growth-related needs, as demonstrated in Table 9. Furthermore, impact fees will not be used to address existing deficiencies. See Table 10 for a complete identification of funding sources.

As required by the local ordinances, a 50% discount is applied to the calculated school impact fee. The District has applied an additional discretionary discount to the multi-family fee. This discretionary discount will be revisited in future updates to this CFP.

The following projects are included in the impact fee calculation:

- Future Bond capacity addition at Salem Woods Elementary School; and
- Future Bond capacity addition at Frank Wagner Elementary School.

Please see Table 10 and Table 12 for relevant cost data related to each capacity project and the variables used to calculate the impact fees.

Table 12: Impact Fee Variables

Student Generation Factors – Single Family		Average Site Cost/Acre	
Elementary	.184		N/A
Middle	.074		
Senior	.080		
Total	.341		
Student Generation Factors – Multi Family (1 Bdrm)		Temporary Facility Capacity	
Elementary	.000	Capacity	
Middle	.000	Cost	
Senior	.000		
Total	.000		
Student Generation Factors – Multi Family (2+ Bdrm)		State Match Credit	
Elementary	.108	Current State Match Percentage	49.91%
Middle	.058		
Senior	.078		
Total	.244		
Projected Student Capacity per Facility		Construction Cost Allocation	
Elementary (new addition – Salem Woods) - 88		Current CCA	246.83
Elementary (new addition – Frank Wagner) – 88			
Required Site Acreage per Facility		District Average Assessed Value	
Facility Construction/Cost Average		Single Family Residence	\$584,150
Salem Woods (Addition)	\$6,743,852		
Frank Wagner (Addition)	\$5,185,102		
		District Average Assessed Value	
		Multi Family (1 Bedroom)	\$169,461
		Multi Family (2+ Bedroom)	\$239,226
		SPI Square Footage per Student	
		Elementary	90
		Middle	108
		High	130
		District Debt Service Tax Rate for Bonds	
		Current/\$1,000	\$0.82044
Permanent Facility Square Footage		General Obligation Bond Interest Rate	
Elementary	310,369	Current Bond Buyer Index	2.45%
Middle	242,677		
Senior	245,122		
Total 97.57%	798,168	Developer Provided Sites/Facilities	
Temporary Facility Square Footage		Value	0
Elementary	10,827	Dwelling Units	0
Middle	1,536		
Senior	7,560		
Total 2.43%	19,923		
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

Using the variables and formula described, impact fees proposed for the Monroe School District are summarized in Table 13. Refer to Appendix D for impact fee calculations.

Table 13
Monroe School District
Proposed Impact Fee Schedule*

Housing Type	Impact Fee Per Unit
Single-Family	\$2,961
Multi-Family (2+bedrooms)	\$2,112
Multi-Family (one bedroom/less)	\$0

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

Appendix A

District Modified Cohort Survival Enrollment Projections

Medium Range Projection (Recommended)

Projection (Medium Range)

<i>Projected Births</i>										
Birth Year	<u>2017</u>	<u>2018</u>	<u>2019</u>	<u>2020</u>	<u>2021</u>	<u>2022</u>	<u>2023</u>	<u>2024</u>	<u>2025</u>	<u>2026</u>
County Births	9,877	9,754	9,669	9,323	9,443	9,459	9508	9556	9598	9632
Pct of Cohort	4.63%	4.98%	5.01%	4.98%	4.93%	4.99%	4.98%	4.98%	4.98%	4.98%
City of Monroe Births	346	302	300	289	293	293	295	296	298	299
	132.1%	160.7%	161.5%	160.7%	159.1%	161.0%	160.7%	160.7%	160.7%	160.7%
	<u>Oct-22</u>	<u>Oct-23</u>	<u>Oct-24</u>	<u>Oct-25</u>	<u>Oct-26</u>	<u>Oct-27</u>	<u>Oct-28</u>	<u>Oct-29</u>	<u>Oct-30</u>	<u>Oct-31</u>
K	457	486	484	464	466	472	474	476	478	480
1	430	481	514	509	484	491	497	498	501	503
2	368	428	480	507	501	483	486	491	493	495
3	408	367	431	476	501	502	480	482	488	489
4	435	412	374	432	475	508	505	482	484	490
5	409	435	416	372	428	478	506	502	479	482
6	402	405	435	408	364	425	470	498	494	472
7	400	401	408	431	404	365	422	467	495	491
8	449	407	412	412	434	413	370	427	473	501
9	464	454	416	415	413	442	416	373	431	477
10	496	463	458	413	410	415	439	413	370	428
11	389	448	422	411	369	372	373	395	371	333
12	<u>447</u>	<u>398</u>	<u>463</u>	<u>429</u>	<u>416</u>	<u>379</u>	<u>379</u>	<u>380</u>	<u>402</u>	<u>378</u>
Total	5555	5586	5714	5680	5665	5746	5815	5884	5959	6018
Change	67	31	128	-35	-14	81	69	69	75	59
% Change	1.2%	0.6%	2.3%	-0.6%	-0.3%	1.4%	1.2%	1.2%	1.3%	1.0%
Enrollment by Level										
K-5	2508	2608	2699	2760	2854	2935	2946	2931	2923	2939
6-8	1251	1213	1256	1252	1202	1203	1263	1393	1462	1464
9-12	1796	1764	1760	1667	1608	1608	1607	1560	1574	1615

Appendix B

2022 Student Generation Rate Study

Student Generation Rate Report

for the Monroe School District

Date: March 7, 2022

Student Generation Rate Report

Prepared for
Victor Scarpelli
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14692 179th Ave SE, Monroe, WA 98272

BlueLine Job No. 22-038
Prepared by: Chase Killebrew, AICP
Reviewed by: Eric Jensen

This report shows the estimated number of students for each grade that is typically generated by different dwelling unit types within the Monroe School District (MSD). These student generation rates (SGRs) assist in predicting future enrollment for the short term and long-term planning horizons as development and redevelopment change the mix of housing types in the district. SGRs are also used in the school impact fee formula to determine the per dwelling unit cost of needed new school capacity.

This document describes the methodology used to calculate SGRs for the MSD and provides the findings of those calculations. SGRs were calculated for two types of residential construction: single-family detached and multifamily. Manufactured homes are included in the single-family detached classification. Single-family attached units such as condominiums, townhomes, and multiplexes are included in the multifamily classification.

Electronic records were pulled from the Snohomish County Assessor's FTP Data Downloads webpage. The specific dataset titled *Improvement Records* was filtered to only contain residential development data from the past 5 years (2017 – 2021). This table was brought into ArcGIS. Using a shapefile of the MSD boundary, all the records attached to parcels located within MSD were selected, creating a new MSD-specific table. The table was divided by single-family versus multifamily development. Then the multifamily list was divided by number of bedrooms, where all units containing 1 bedroom or less are grouped and units containing 2 or more bedrooms are grouped. No multifamily units containing 1 bedroom or less were found in this data.

The School District provided Blueline with student records data including the addresses and grade levels of all P3-12 students attending the Monroe School District as of January 2022. This data containing 5,803 students was reformatted so the addresses matched the style of the MSD Improvement Records address data.

There were 889 records indicating construction of new single-family detached units. These were cross-referenced and matched with the student records data, and the matches were tallied by grade level. The same was done for the 18 multifamily (2+ bedroom) records. The tables showing the results are shown on the following page.

	SINGLE-FAMILY	MULTIFAMILY (0-1 BR)	MULTIFAMILY (2+ BR)	TOTAL
UNITS CONSTRUCTED IN MSD (2017 - 2021)	889	0	18	907
NUMBER OF STUDENTS ATTENDING MONROE SCHOOL DISTRICT	5,803			



SUMMARY OF STUDENT GENERATION RATES FOR MONROE SCHOOL DISTRICT (2017 – 2021)

Single-family SGRs

GRADE(S)	COUNT OF MATCHES	CALCULATED RATE
P3	3	0.003
P4	0	0.000
K1	34	0.038
1	26	0.029
2	29	0.033
3	29	0.033
4	22	0.025
5	23	0.026
6	20	0.022
7	22	0.025
8	24	0.027
9	23	0.026
10	15	0.017
11	16	0.018
12	17	0.019
P3 - 5	166	0.187
6 - 8	66	0.074
9 - 12	71	0.080
P3 - 12	303	0.341

Multifamily (2+ BR) SGRs

GRADE(S)	COUNT OF MATCHES	CALCULATED RATE
P3	0	0.000
P4	0	0.000
K1	0	0.000
1	0	0.000
2	0	0.000
3	0	0.000
4	0	0.000
5	0	0.000
6	0	0.000
7	0	0.000
8	0	0.000
9	0	0.000
10	0	0.000
11	1	0.056
12	0	0.000
P3 - 5	0	0.000
6 - 8	0	0.000
9 - 12	1	0.056
P3 - 12	1	0.056

SGRs Summary Table

	P3 - 5	6 - 8	9 - 12	P3 - 12
SINGLE-FAMILY	0.187	0.074	0.080	0.341
MULTIFAMILY (0-1 BR)	0.000	0.000	0.000	0.000
MULTIFAMILY (2+ BR)	0.000	0.000	0.056	0.056



Appendix D

Impact Fee Calculation

School Impact Fee Calculation - Single Family Dwelling Unit
Monroe School District 2022 CFP

School Site Acquisition Cost:

	<u>Site Size Acreage</u>	<u>Cost/ Acre</u>	<u>Facility Size</u>	<u>Site Cost/ Student</u>	<u>Student Factor</u>	<u>Cost/ SFDU</u>
Elementary	10	\$0	550	\$0	0.1840	\$0
Middle	20	\$0	850	\$0	0.0740	\$0
Senior	40	\$0	1600	\$0	0.0800	\$0
TOTAL						\$0

School Construction Cost:

	<u>Sq. Ft. % Permanent</u>	<u>Facility Cost</u>	<u>Facility Size</u>	<u>Bldg. Cost/ Student</u>	<u>Student Factor</u>	<u>Cost/ SFDU</u>
Elementary	97.57%	\$11,928,954	176	\$67,778	0.1840	\$12,168
Middle	97.57%	\$0	850	\$0	0.0740	\$0
Senior	97.57%	\$0	1600	\$0	0.0800	\$0
TOTAL						\$12,168

Temporary Facility Cost:

	<u>Sq. Ft. % Temporary</u>	<u>Facility Cost</u>	<u>Facility Size</u>	<u>Bldg. Cost/ Student</u>	<u>Student Factor</u>	<u>Cost/ SFDU</u>
Elementary	2.43%	\$0	25	\$0	0.1840	\$0
Middle	2.43%	\$0	25	\$0	0.0740	\$0
Senior	2.43%	\$0	25	\$0	0.0800	\$0
TOTAL						\$0

State School Construction Funding Assistance Credit:

	<u>Const Cost Allocation</u>	<u>OSPI Sq. Ft./ Student</u>	<u>Funding Assistance</u>	<u>Credit/ Student</u>	<u>Student Factor</u>	<u>Cost/ SFDU</u>
Elementary	246.83	90.0	49.91%	\$11,087	0.1840	\$2,040
Middle	246.83	108.0	0.00%	\$0	0.0740	\$0
Senior	246.83	130.0	0.00%	\$0	0.0800	\$0
TOTAL						\$2,040

School Impact Fee Calculation - Single Family Dwelling Unit
Monroe School District 2022 CFP

Tax Payment Credit Calculation:

Average SFR Assessed Value	\$584,150
Current Capital Levy Rate/\$1000	\$0.82
Annual Tax Payment	\$479.26
Years Amortized	10
Current Bond Interest Rate	2.45%
Present Value of Revenue Stream	\$4,205

Impact Fee Summary - Single Family Dwelling Unit:

Site Acquisition Cost	\$0
Permanent Facility Cost	\$12,168
Temporary Facility Cost	\$0
State SCFA Credit	(\$2,040)
Tax Payment Credit	(\$4,205)
Unfunded Need	\$5,923
50% Required Adjustment	\$2,961

Single Family Impact Fee	\$2,961
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School Impact Fee Calculation - Multi-Family 2+ Dwelling Unit
Monroe School District 2022 CFP

School Site Acquisition Cost:

	<u>Site Size Acreage</u>	<u>Cost/ Acre</u>	<u>Facility Size</u>	<u>Site Cost/ Student</u>	<u>Student Factor</u>	<u>Cost/ MFDU</u>
Elementary	10	\$0	550	\$0	0.1080	\$0
Middle	20	\$0	850	\$0	0.0580	\$0
Senior	40	\$0	1600	\$0	0.0780	\$0
					TOTAL	\$0

School Construction Cost:

	<u>Sq. Ft. % Permanent</u>	<u>Facility Cost</u>	<u>Facility Size</u>	<u>Bldg. Cost/ Student</u>	<u>Student Factor</u>	<u>Cost/ MFDU</u>
Elementary	97.57%	\$11,928,954	176	\$67,778	0.1080	\$7,142
Middle	97.57%	\$0	850	\$0	0.0580	\$0
Senior	97.57%	\$0	1600	\$0	0.0780	\$0
					TOTAL	\$7,142

Temporary Facility Cost:

	<u>Sq. Ft. % Temporary</u>	<u>Facility Cost</u>	<u>Facility Size</u>	<u>Bldg. Cost/ Student</u>	<u>Student Factor</u>	<u>Cost/ MFDU</u>
Elementary	2.43%	\$0	25	\$0	0.1080	\$0
Middle	2.43%	\$0	25	\$0	0.0580	\$0
Senior	2.43%	\$0	25	\$0	0.0780	\$0
					TOTAL	\$0

State School Construction Funding Assistance Credit:

	<u>Const Cost Allocation</u>	<u>OSPI Sq. Ft./ Student</u>	<u>Funding Assistance</u>	<u>Credit/ Student</u>	<u>Student Factor</u>	<u>Cost/ MFDU</u>
Elementary	246.83	90.0	49.91%	\$11,087	0.1080	\$1,197
Middle	246.83	108.0	0.00%	\$0	0.0580	\$0
Senior	246.83	130.0	0.00%	\$0	0.0780	\$0
					TOTAL	\$1,197

School Impact Fee Calculation - Multi-Family 2+ Dwelling Unit
Monroe School District 2022 CFP

Tax Payment Credit Calculation:

Average MFR Assessed Value	\$239,226
Current Capital Levy Rate/\$1000	\$0.82
Annual Tax Payment	\$196.17
Years Amortized	10
Current Bond Interest Rate	2.45%

Present Value of Revenue Stream	\$1,721
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Impact Fee Summary - Multi-Family Dwelling Unit:

Site Acquisition Cost	\$0
Permanent Facility Cost	\$7,142
Temporary Facility Cost	\$0
State SCFA Credit	(\$1,197)
Tax Payment Credit	(\$1,721)

Unfunded Need	\$4,223
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50% Required Adjustment	\$2,112
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Multi-Family Impact Fee	\$2,112
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Mukilteo
School District

MUKILTEO SCHOOL DISTRICT NO. 6

CAPITAL FACILITIES PLAN 2022 – 2027

BOARD OF DIRECTORS

John Gahagan
Charles Hauck
Kyle Kennedy
Judy Schwab
Michael Simmons

SUPERINTENDENT

Dr. Alison Brynelson

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

Board Approved: July 18, 2022

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SECTION 1 - INTRODUCTION

Purpose of the Capital Facilities Plan

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

The Mukilteo School District (District) has prepared this six-year Capital Facilities Plan (CFP) in accordance with the Washington State Growth Management Act and the codes of Snohomish County, City of Mukilteo, and City of Everett. This CFP is intended to provide these jurisdictions with a description of projected student enrollment and school capacities at established levels of service over the six-year period, 2022-2027.

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 14,581 (October 2021) with one kindergarten center, twelve elementary schools (grades K-5), four middle schools (grades 6-8), two comprehensive high schools (grades 9-12), and one small choice high school (grades 10-12). For the purposes of facility planning, this CFP considers grades K-5 as elementary, grades 6-8 as middle school, and grades 9-12 as high school. For purposes of this CFP, enrollment in the Sno-Isle Skills Center is not included as the Skills Center is a regional career and technical education partnership serving students from 14 different school districts and does not have space that can be utilized by Mukilteo School District for its traditional K-12 education purposes.

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

- Capacity needs during the six-year period of the plan at the elementary and high school grade spans.
- Uneven growth rates between geographic sectors within the District. These uneven growth patterns result in some schools reaching maximum capacity sooner than others and this will increase the difficulty of maintaining stable school service area boundaries.
- Uncertainty of growth rates for new housing development and enrollment given the unprecedented nature of the pandemic and its current impacts on construction. 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 special education, bilingual education, preschool and daycare programs, computer labs, and music/performing arts programs. These programs can have a significant impact on the available student capacity of school facilities.

District Educational Program Standards.

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

Advanced Placement (high school)	Library/Media Centers
Special Education (resource or specialized)	Speech Language Pathologists
Special Education (early childhood)	Performing Arts
Summer School	Health & Fitness
Highly Capable Program (grades 3-8)	Science Labs
English as a Second Language (ESL)	OT/PT
English Language Learner (ELL)	Career Centers (High School)
World Languages	Student Stores (High School)
Community-Based Transition Program	Learning Assistance Programs (LAP)
ECEAP	Mukilteo Behavioral Support Center
Music Programs	Career and Technical Education
Computer & Technology Labs	College in the High School
Title 1 Support	Opportunity Day School

The above programs affect the capacity of some of the buildings housing these programs. Special programs usually require space modifications and frequently require lower class sizes than other, more traditional programs; this affects available school capacity as it results in greater space requirements. These requirements affect the utilization of rooms and result in school capacities varying from year to year (as programs move or grow, depending on space needs, capacity can increase or decline in a school).

District educational program standards may change in the future as a result of various external or internal changes. External changes may include mandates and needs for special programs or use of technology. Internal changes may include modifications to the program year, class sizes, and grade span configurations. Changes in physical aspects of the school facilities could also affect educational

program standards. The school capacity inventory will be reviewed periodically and adjusted for any changes to the educational program standards. These changes will also be reflected in future updates of this CFP.

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

Educational Program Standards for Elementary Schools

- Planning class size for Kindergarten 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 should have a room dedicated as a computer lab
- It is not possible to achieve 100% utilization of all regular teaching stations throughout the day. Therefore, classroom capacity is adjusted using a utilization factor of 85%

Educational Program Planning Standards for Middle and High Schools

- Planning class size for middle school grades is 25 students per teacher
- Class size for middle school grades 6 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 English Language Learner).

Minimum Level of Service

Planning class sizes are used to determine school capacities, they are not a measure of the District's minimum level of service. The minimum level of service is defined as the maximum level of enrollment the District can accommodate at any given time. The minimum level of service is not the District's desired level for providing education. At current program offerings and within existing permanent and portable facilities, the District's minimum level of service is:

Grade Level	# of Scheduled Teaching Stations	Min. Level of Service	2019-20 Level of Service*	2020-21 Level of Service*
K-5	313	25	22.7	21.0
6-8	166	30	22.8	22.2
9-12	161	33	27.9	27.7

**Note: COVID-19 resulted in Governor-mandated shift to online only learning during the 2019-20 school year. Ongoing pandemic related health and safety protocols resulted in distance learning for most of 2020-21 school year. Level of Service figures represent what in-person ratios would have been if all students had attended in person.*

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 elementary 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	50,022	1987	398
Columbia	9.6	65,219	1989	514
Discovery	9.3	42,708	1988/2017	368
Endeavour	9.4	53,376	1994	397
Fairmount	15	66,189	1952/1999	585
Horizon	19	56,162	1989	532
Lake Stickney	9.8	74,167	2016	657
Mukilteo	9.8	41,706	1981	426
Odyssey	10.9	60,631	2003	578
Olivia Park	9.5	49,881	1956/1992	528
Pathfinder*		65,035	2017	483
Picnic Point	10	39,271	1981	381
Serene Lake	10	49,230	1969/1994	381
Total K-5		713,597		6,228
Explorer	29.5	129,539	1972/2005	949
Harbour Pointe	17.8	110,400	1993	896
Olympic View	25.2	114,541	1955/2017	951
Voyager	16	106,954	1992	899
Total 6-8		461,434		3,695
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		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 – 2021-22 Portable Classroom Inventory

School	Classroom Portables	Interim Capacity
Challenger	11	175
Columbia	0	0
Discovery	14	305
Endeavour	6	63
Fairmount	4	0
Horizon	6	100
Lake Stickney	0	0
Mukilteo	10	137
Odyssey	8	133
Olivia Park	5	25
Pathfinder	0	0
Picnic Point	6	96
Serene Lake	4	84
Subtotal K-5	74	1,118
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	2,162

**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 2022-2027

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 15,141 by 2027. 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 2021	Projections					
		2022	2023	2024	2025	2026	2027
K	1,124	1,134	1,196	1,177	1,135	1,151	1,153
1	1,043	1,202	1,263	1,241	1,222	1,179	1,196
2	1,148	1,055	1,219	1,272	1,250	1,232	1,189
3	1,112	1,159	1,068	1,225	1,278	1,258	1,239
4	1,087	1,122	1,172	1,073	1,231	1,285	1,265
5	1,110	1,094	1,132	1,175	1,075	1,234	1,289
6	1,098	1,098	1,085	1,115	1,156	1,059	1,217
7	1,176	1,105	1,107	1,086	1,116	1,159	1,062
8	1,182	1,190	1,120	1,115	1,094	1,125	1,169
9	1,215	1,193	1,204	1,126	1,121	1,101	1,132
10	1,106	1,218	1,200	1,202	1,124	1,120	1,100
11	1,056	1,038	1,146	1,121	1,123	1,051	1,047
12	1,124	1,092	1,076	1,179	1,153	1,157	1,083
Total K-5	6,624	6,766	7,050	7,163	7,191	7,339	7,331
Total 6-8	3,456	3,393	3,312	3,316	3,366	3,343	3,448
Total 9-12	4,501	4,541	4,626	4,628	4,521	4,429	4,362
District Total	14,581	14,700	14,988	15,107	15,078	15,111	15,141

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 1.77% of the OFM/County Population estimates. Further, District enrollment averaged 13.5% 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 2020	% MSD Population		% County Population	
		2027	2044	2027	2044
Elementary	6,565	7,255	9,237	7,278	9,010
Middle School	3,599	3,977	5,064	3,990	4,939
High School	4,454	4,922	6,267	4,938	6,113
Total	14,618	16,154	20,568	16,206	20,062

*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 (2022-2027). A long-term projection of un-housed students and facilities needs is shown in Table 5.1. On February 11, 2020 voters approved a six-year, \$240 million capital bond. Planned new capacity improvements included in that bond are represented below, through 2026. The projects include new elementary classroom capacity from projects at three existing elementary schools and potential additional capacity at one existing high school. 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

	2021-22	2022-23	2023-24	2024-25	2025-26	2026-27	2027-28
Elementary Enrollment	6,624	6,766	7,050	7,163	7,191	7,339	7,331
Permanent Capacity - Existing	6,228	6,228	6,403	6,628	6,628	6,628	6,828
New Permanent Capacity		175	225			200	
TOTAL Permanent Capacity	6,228	6,403	6,628	6,628	6,628	6,828	6,828
Permanent Capacity over/(short)	(396)	(363)	(422)	(535)	(563)	(511)	(503)
Middle School Enrollment	3,456	3,393	3,312	3,316	3,366	3,343	3,448
Permanent Capacity - Existing	3,695	3,695	3,695	3,695	3,695	3,695	3,895
New Permanent Capacity						200	
TOTAL Permanent Capacity	3,695	3,695	3,695	3,695	3,695	3,895	3,895
Permanent Capacity over/(short)	239	302	383	379	329	552	447
High School Enrollment	4,501	4,541	4,626	4,628	4,521	4,429	4,362
Permanent Capacity - Existing	3,639	3,639	3,639	3,639	3,639	3,639	3,759
New Permanent Capacity						120	
TOTAL Permanent Capacity	3,639	3,639	3,639	3,639	3,639	3,759	3,759
Permanent Capacity over/(short)	(862)	(902)	(987)	(989)	(882)	(670)	(603)
TOTAL ENROLLMENT	14,581	14,700	14,988	15,107	15,078	15,111	15,141
Total Permanent	13,562	13,562	13,730	13,962	13,962	13,962	14,482
Total New Permanent		175	225			520	
TOTAL Permanent Capacity	13,562	13,737	13,962	13,962	13,962	14,482	14,482
Permanent Capacity over/(short)	(1,019)	(963)	(1,026)	(1,145)	(1,116)	(629)	(659)

Does not include interim/portable capacity

SECTION 6 – SIX-YEAR FINANCING PLAN

Planned Improvements

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

- Alternative scheduling options
- Changes in the instructional model
- Grade configuration change
- Purchasing portable classrooms
- Busing
- Increased class sizes; or
- A modified school-year calendar

The six-year financing plan includes projects adding elementary and high school classroom capacity. In addition, the District may continue to add and use portable classrooms as part of the capacity solution. It is anticipated that additional interim capacity via portable classrooms will be needed until additional permanent capacity beyond what was included in the voter approved February 2020 capital bond measure can be determined.

Funding for planned improvements is typically secured from 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 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 2022-2027. 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	2021	ANTICIPATED YEAR						Total Cost	POTENTIAL FUNDING SOURCE			
		2022	2023	2024	2025	2026	2027		Bonds/ Levy	SCAP (State)	Impact Fees	Future Source
Discovery Elementary Addition	12.8	14.5	1.1	0.1				28.5	X		X	
Challenger Elementary Addition	0.2	0.7	4.3	10.5	1.3			17.0	X		X	
Horizon Elementary Addition	0.8	6.4	8.6	1.2				17.0	X		X	
Mariner H.S. Addition	1.2	3.0	7.7	12.3	0.8			25.0	X		X	
Explorer M.S. Replacement (Ph1)	0.1	0.7	2.0	10.0	16.5	0.7		30.0	X	X		X
Serene Lake E.S Replacement (Ph1)		0.1	1.1	6.7	11.7	0.4		20.0	X	X	X	X
Mukilteo E.S. Replacement (Ph1)		0.5	1.0	8.5	14.2	0.8		25.0	X	X	X	X
Interim (portable) Capacity	1.0	0.5	0.2	0.2	0.2	0.2	.2	2.5	X		X	
TOTAL CAPACITY PROJECTS	16.1	26.4	26.0	49.5	44.7	2.1	.2	165.0				

PROJECTS NOT ADDING CAPACITY	2021	ANTICIPATED YEAR						Total Cost	POTENTIAL FUNDING SOURCE			
		2022	2023	2024	2025	2026	2027		Bonds/ Levy	SCAP (State)	Impact Fees	Future Source
Districtwide Security Improvements	1.3	1.2	2.3	3.6	3.1			11.5	X			
Districtwide Field Improvements	2.1	3.0	4.1	0.2	0.5	3.4		13.3	X			X
Districtwide Roofing Improvements		0.5	0.5	0.5	0.5	0.5	0.5	3.0	X			X
Districtwide Flooring Improvements		0.4	0.4	0.4	0.4	0.4	0.4	2.4	X			X
Districtwide ADA Improvements		0.5	0.5	0.5	0.5	0.5	0.5	3.0	X			X
Performing Arts Center Improvements		0.6	0.7	8.5	0.2			10.0	X			
Facility System Improvements	10.7	23.0	10.8	8.5	9.0	7.5	7.3	76.8	X			X
TOTAL Non-CAPACITY PROJ.	14.1	29.2	19.3	22.2	14.2	12.3	8.7	120.0				

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 the following residential unit types:
 1. single family
 2. multi-family/1-bedroom or less; and
 3. multi-family/2-bedroom or more which includes townhomes and duplexes.

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

Methodology and Variables Used to Calculate School Impact Fees

Impact fees have been calculated utilizing the formula in the Snohomish County Impact Fee Ordinance (SCC 30.66C). The resulting figures are based on the District's cost per dwelling unit to purchase land for school sites, make site improvements, construct schools and purchase/install relocatable facilities (portables) that add capacity needed to serve new development. As required under the GMA, credits have also been applied in the formula to account for SCAP ("state match") funds to be reimbursed to the District and for projected future property taxes to be paid by the dwelling unit.

Site Acquisition Cost Element

1. Site Size – Acreage needed to accommodate each planned project.
2. Average Land Cost Per Acre – based on current estimates of land costs within the District.
3. Facility Design Capacity – number of students each planned project is designed to accommodate.
4. Student Factor – Number of students generated by each housing type – in this case, single family dwellings and multi-family dwellings. A student generation rate study was conducted to determine the updated generation rate for this CFP. See Appendix A for the study information. Current student generation rates for the district are shown below:

Table 7.1 – Student Generation Rates*

Grade Span	Single Family	Multi-Family (1bdm/less)	Multi-Family (2+bedroom)
Elementary (K-5)	.102	.043	.370
Middle School (6-8)	.038	.005	.182
High School (9-12)	.055	.003	.182
Total (K-12)	.195	.051	.734

**Full study info included in Appendices*

School Construction Cost Variables

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

Relocatable Facilities Cost Element

Impact fees may be collected to allow acquisition of relocatable classrooms needed to serve growth on an interim basis. The cost allocated to new development must be growth related and must be in proportion to the current permanent and interim space ratios in the District.

1. Cost Per Unit – The average cost 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 \$246.83 for new construction projects approved in July of 2022.
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 50.86% 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 2022 average interest rate of 2.45%
2. Bond Levy Rate – The current bond levy rate is \$.90 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 \$622,683 for single family dwelling units; \$203,889 for one-bedroom multi-family dwelling units; and \$287,840 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, Multi-Family 1 bedroom, and Multi-Family 2+bedroom dwelling units, including Townhomes and Duplexes.

Table 7.2 – School Impact Fees*

Housing Type	Impact Fee Per Unit
Single Family	\$1,121
Multi-Family (1 bedroom or less)	\$700
Multi-Family (2+ bedroom; Townhomes; Duplexes)	\$11,846

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

APPENDIX A

STUDENT GENERATION RATE STUDY



MEMORANDUM

To: Karen Mooseker
Executive Director, District Support Services
Mukilteo School District

Date: April 22, 2022

From: Tyler Vick
Managing Director

Project No.: F2133.01.003

Benjamin Maloney
Demographer/Data Analyst

Re: Student Generation Report— Mukilteo School District

At the request of the Mukilteo School District (District/MSD), FLO Analytics (FLO) has prepared an analysis of the student generation rates (SGRs) as a result of recent residential construction within the district. This document details the methodology FLO used to create the SGRs for MSD; 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. For the analysis, FLO considered new SF construction between 2016 and 2021, and new MF construction between 2016 and 2021. The findings are presented per individual grade and per grade group.

METHODS

The SGR analysis is based on two data sources: (1) January 2016 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 one MF project that was erroneously listed as having been completed between 2016 and 2021. This project is an apartment complex that was not completed as of December 2021. 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 1,200 SF units completed between 2016 and 2021 and 11 MF projects completed between 2016 and 2021. While the majority of the SF construction consisted of units classified as "Single Family Residence – Condominium Detached" (499 units), a variety of units with other SF use codes were also constructed, including duplexes, common wall condominiums, and manufactured homes (owned and leased). MF development ranged from three and four family residences to a 300+ unit construction project. About 76 percent (1,216 units) of these new MF units were 2+ BR units, while the remainder (391 units) were 0–1 BR units.

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All students (grades kindergarten [K] through 12) in the October 1, 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 2016–2021 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 2016 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 1,200 SF units were compared to the 14,604 students enrolled with 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	31	0.026
1	18	0.015
2	20	0.017
3	21	0.018
4	22	0.018
5	10	0.008
6	26	0.022
7	13	0.011
8	6	0.005
9	22	0.018
10	11	0.009
11	17	0.014
12	16	0.013
K–5	122	0.102
6–8	45	0.038
9–12	66	0.055
K–12	233	0.194

Multifamily Developments

While SF data are mostly 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. 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 four projects constructed between January 2016 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 Puget Park Apartments and Madison Way Apartments. Despite numerous attempts, no bedroom information could be received from Helm Apartments or Manor Way Apartments. Based on trends within and surrounding the district, FLO assumed 90 percent of the students would reside within a 2+ BR unit with the remaining 10 percent residing within a 0–1 BR unit. Other apartments (triplex, fourplex units, and one garden style apartment) were assessed visually using Google Earth and SCAO data.

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 391 0–1 BR units were constructed from 2016 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	3	0.008
1	4	0.010
2	4	0.010
3	3	0.008
4	1	0.003
5	2	0.005
6	0	0.000
7	0	0.000
8	2	0.005
9	1	0.003
10	0	0.000
11	0	0.000
12	0	0.000
K–5	17	0.043
6–8	2	0.005
9–12	1	0.003
K–12	20	0.051

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 1,216 2+ BR units were constructed from 2016 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	70	0.058
1	82	0.067
2	76	0.063
3	68	0.056
4	70	0.058
5	84	0.069
6	67	0.055
7	80	0.066
8	74	0.061
9	67	0.055
10	69	0.057
11	49	0.040
12	36	0.030
K-5	450	0.370
6-8	221	0.182
9-12	221	0.182
K-12	892	0.734

Summary of Student Generation Rates

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

Type	K-5	6-8	9-12	K-12
Single-family	0.102	0.038	0.055	0.194
Multifamily 0-1 BR	0.043	0.005	0.003	0.051
Multifamily 2+ BR	0.370	0.182	0.182	0.734

Summary of 2016–2021 Multifamily Developments

Table 5. Summary of Multifamily Developments by Elementary School Boundary

Building Name	Number of Units	School
Helm Apartments	192	Lake Stickney ES
Madison Way Apartments	180	Lake Stickney ES
Manor Way Apartments	205	Lake Stickney ES
Puget Park Apartments	256	Discovery ES
Emerald Court Apartments	42	Fairmount ES
The Vantage	369	Serene Lake ES/Fairmount ES
Axis Apartments	276	Fairmount ES
8307 5 th Ave W	14	Horizon ES
716 3 rd St	8	Fairmount ES
2310 116 th St SW	3	Fairmount ES
2 112 th St SW	4	Discovery ES

Summary of Single-Family Housing Built by Year

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

2016	2017	2018	2019	2020	2021
118	299	137	164	236	246

APPENDIX B – SCHOOL IMPACT FEE CALCULATION

	Facility Acreage	Cost/Acre	Facility Capacity	Student Factor SFR	Student Factor MFR (1)	Student Factor MFR (2+)	Cost/ SFR	Cost / MFR 1	Cost / MFR 2+
Elementary	10	\$ -	600	0.102	0.043	0.370	\$0	\$0	\$0
Middle	20	\$ -	800	0.038	0.005	0.182	\$0	\$0	\$0
High	40	\$ -	1,600	0.055	0.003	0.182	\$0	\$0	\$0
TOTAL							\$0	\$0	\$0

	% Perm/Total Sq. Ft	Facility Cost	Capacity	Student Factor SFR	Student Factor MFR (1)	Student Factor MFR (2+)	Cost/ SFR	Cost / MFR 1	Cost/ MFR 2+
Elementary	90.75%	\$53,416,654	600	0.102	0.043	0.370	\$8,241	\$3,474	\$29,893
Middle	98.11%	\$ -	200	0.038	0.005	0.182	\$0	\$0	\$0
High	92.62%	\$ -	120	0.055	0.003	0.182	\$0	\$0	\$0
TOTAL							\$8,241	\$3,474	\$29,893

Temporary Facility Cost:

	% Temp/Total Sq. Ft.	Facility Cost	Facility Capacity	Student Factor SFR	Student Factor MFR (1)	Student Factor MFR (2+)	Cost/ SFR	Cost / MFR 1	Cost/ MFR 2+
Elementary	9.25%	\$130,000	25	0.102	0.043	0.370	\$49	\$21	\$178
Middle	1.89%	\$130,000	27	0.038	0.005	0.182	\$3	\$0	\$17
High	7.38%	\$130,000	30	0.055	0.003	0.182	\$18	\$1	\$58
TOTAL							\$70	\$22	\$253

	Current CCA	OSPI Sq. Footage	District Funding %	Student Factor SFR	Student Factor MFR (1)	Student Factor MFR (2+)	Cost/ SFR	Cost / MFR 1	Cost/ MFR 2+
Elementary	\$246.83	90	50.86%	0.102	0.043	0.370	\$1,152	\$486	\$4,180
Middle	\$0	108	50.86%	0.038	0.005	0.182	\$0	\$0	\$0
High	\$0	130	50.86%	0.055	0.003	0.182	\$0	\$0	\$0
TOTAL							\$1,152	\$486	\$4,180

Tax Payment Credit Calculation:

Average Assessed Value	\$622,683	\$203,899	\$287,840
Capital Bond Int. Rate	2.45%	2.45%	2.45%
Years Amortized	10	10	10
Property Tax Levy Rate	\$0.90	\$0.90	\$0.90
Tax Payment Credit	\$4,917	\$1,610	\$2,273

Impact Fee Calculation Summary:

Site Acquisition Cost	\$0	\$0	\$0
Permanent Facility Cost	\$8,241	\$3,474	\$31,918
Temporary Facility Cost	\$70	\$22	\$253
State SCAP Credit	(\$1,152)	(\$486)	(\$4,180)
Tax Payment Credit	(\$4,917)	(\$1,610)	(\$2,273)
Fee As Calculated	\$2,241	\$1,400	\$23,692
50% Required Discount	(\$1,121)	(\$700)	(\$11,846)
Impact Fee	\$1,121	\$700	\$11,846

APPENDIX C

OSPI ENROLLMENT PROJECTIONS



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

MUKILTEO

Grade	--- ACTUAL ENROLLMENTS ON OCTOBER 1st ---						AVERAGE % SURVIVAL	--- PROJECTED ENROLLMENTS ---					
	2016	2017	2018	2019	2020	2021		2022	2023	2024	2025	2026	2027
Kindergarten	1,081	1,146	1,185	1,184	966	1,124		1,082	1,072	1,063	1,054	1,044	1,035
Grade 1	1,137	1,157	1,187	1,188	1,141	1,043	103.03%	1,158	1,115	1,104	1,095	1,086	1,076
Grade 2	1,199	1,144	1,159	1,185	1,112	1,148	98.96%	1,032	1,146	1,103	1,093	1,084	1,075
Grade 3	1,249	1,206	1,152	1,163	1,114	1,112	99.12%	1,138	1,023	1,136	1,093	1,083	1,074
Grade 4	1,315	1,240	1,222	1,158	1,126	1,087	99.09%	1,102	1,128	1,014	1,126	1,083	1,073
Grade 5	1,218	1,303	1,255	1,224	1,106	1,110	98.90%	1,075	1,090	1,116	1,003	1,114	1,071
K-5 Sub-Total	7,199	7,196	7,160	7,102	6,565	6,624		6,587	6,574	6,536	6,464	6,494	6,404
Grade 6	1,181	1,173	1,270	1,228	1,169	1,098	97.27%	1,080	1,046	1,060	1,086	976	1,084
Grade 7	1,230	1,159	1,191	1,292	1,188	1,176	99.74%	1,095	1,077	1,043	1,057	1,083	973
Grade 8	1,161	1,213	1,186	1,168	1,242	1,182	98.92%	1,163	1,083	1,065	1,032	1,046	1,071
6-8 Sub-Total	3,572	3,545	3,647	3,688	3,599	3,456		3,338	3,206	3,168	3,175	3,105	3,128
Grade 9	1,155	1,154	1,252	1,182	1,144	1,215	99.60%	1,177	1,158	1,079	1,061	1,028	1,042
Grade 10	1,118	1,130	1,163	1,247	1,180	1,108	98.97%	1,202	1,165	1,146	1,068	1,050	1,017
Grade 11	1,427	1,394	1,368	1,403	1,466	1,397	120.46%	1,335	1,448	1,403	1,380	1,287	1,265
Grade 12	1,550	1,490	1,444	1,412	1,491	1,555	104.70%	1,463	1,398	1,516	1,469	1,445	1,347
9-12 Sub-Total	5,250	5,168	5,227	5,244	5,281	5,275		5,177	5,169	5,144	4,978	4,810	4,671
DISTRICT K-12 TOTAL	16,021	15,909	16,034	16,034	15,445	15,355		15,102	14,949	14,848	14,617	14,409	14,203

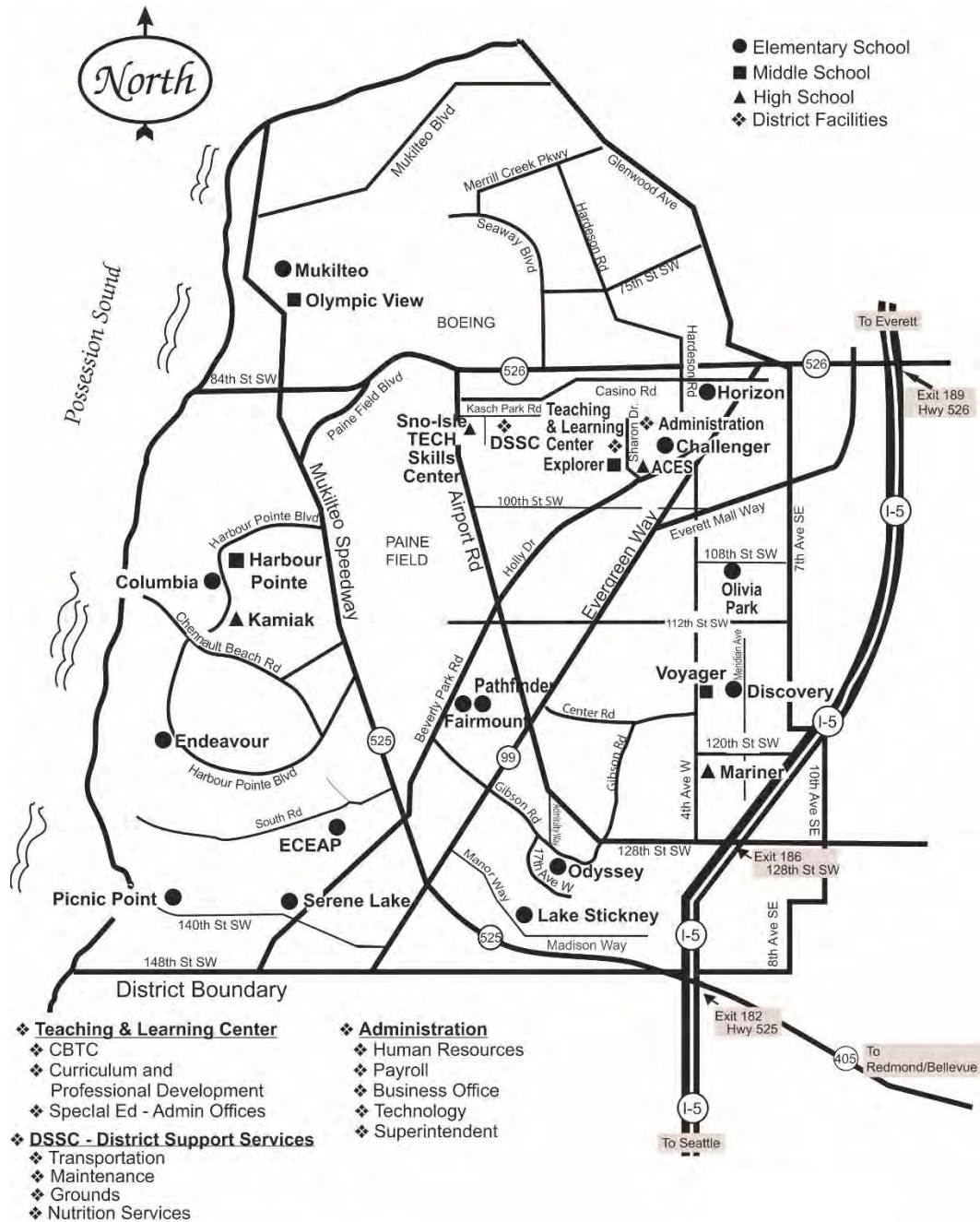
Notes: Specific subtotalling on this report will be driven by District Grade spans.

School Facilities and Organization

Printed Mar 07, 2022

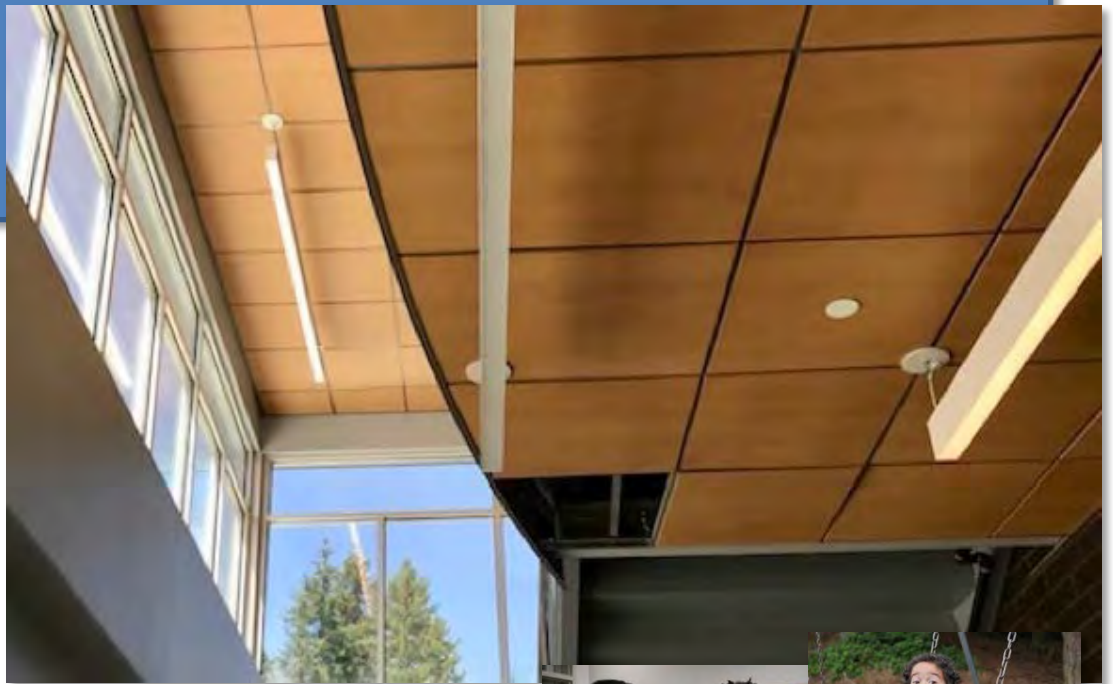
APPENDIX D

MUKILTEO SCHOOL DISTRICT MAP



Capital Facilities Plan 2022-28

Northshore School District
May 2022



CAPITAL FACILITIES PLAN

2022 - 2028

NORTHSHORE SCHOOL DISTRICT NO. 417
3330 Monte Villa Parkway, Bothell, Washington 98021-8972
STRENGTHENING OUR COMMUNITY THROUGH EXCELLENCE IN EDUCATION

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2022 Northshore School District Map

Introduction

Section 1

Purpose of the Capital Facilities Plan

The Washington State Growth Management Act outlines thirteen broad goals including the adequate provision of necessary public facilities and services. Public schools are among these necessary facilities and services. Public school districts adopt capital facilities plans to satisfy the requirements of RCW 36.70A.070 and to identify additional school facilities necessary to meet the educational needs of the growing student population in their districts.

The Northshore School District (NSD/District) has prepared this six-year Capital Facilities Plan (CFP) in accordance with the Washington State Growth Management Act, the Codes of King and Snohomish Counties, and the cities of Bothell, Kenmore, and Woodinville. This CFP is intended to provide these jurisdictions with a description of projected student enrollment and school capacities at established levels of service over the six-year period 2022-2028. It also provides longer-term enrollment projections. The role of impact fees in funding school construction is addressed in **Section 7** of this report.

The District updates its Capital Facilities Plan on an annual basis. The most recent update previous to this version was adopted by the Board of Directors in June 2021.

Summary

NSD enrollment has grown by 1,134 students between 2016 and 2021, with an average growth rate of 1.15%. As a comparison, for the years 2015 to 2020, District enrollment grew by 1,740 students, with an average growth rate of 1.65%. Although growth is still forecast for the district, the impact of the global pandemic has been to slow it down. In October of 2021, the District's enrollment fell by 1.2% primarily as a result of the pandemic and its effects on in-school instruction. We expect fall of 2022-23 enrollment to start to return to pre-pandemic levels and thereafter increase to reflect continued residential development within the District. Enrollment growth from new development in the northern, central, and southern service areas of the District continues at a steady pace.

With the impact of the pandemic, there are questions about future growth in NSD and whether or not it will continue at a rate at or above forecasts, or if growth will begin to stabilize. The sale of existing homes continues to be strong, with over 2,800 existing homes sold in 2020-21, an increase of over 17% from 2019-20. There also continues to be strong growth in new townhome and multi-family projects that could produce enrollment gains. Recent figures allow us to segregate how many new students are generated from townhomes and to calculate a separate impact fee for those jurisdictions that have a separate townhome fee category. In Spring of 2020, approximately 13 students were generated for every 100 townhomes. As of Spring 2022, 38 students are generated per 100 townhomes. See **Appendix A**.

Growth in NSD has largely been accommodated in recent years through the construction of new

capacity, limiting waivers at most schools, converting special-use portables and non-classroom spaces into classroom space, adjusting boundaries, 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 CFP.

Overview of the Northshore School District

The Northshore School District spans 60 square-miles and primarily serves five jurisdictions: King County, Snohomish County, the City of Bothell, the City of Kenmore, and the City of Woodinville. There are some addresses located in the cities of Brier, Kirkland and Redmond, but they are either in areas not expected to experience any new residential development or in very small areas with previously developed residential areas. For the purposes of the District's CFP and long-term projections, those areas are considered de minimis impacts on NSD's grade bands. The King-Snohomish County line divides NSD such that roughly two-thirds of the District's is in King County and one-third in Snohomish County. According to the 2020 Census, the District has a total population of approximately 147,920. The Snohomish County portion of the district population was 63,086. The King County portion of the District population was 84,834.

The 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 Virtual Program) and an early childhood center (Sorenson Early Childhood Center). The current grade configuration is K-5, 6-8, and 9-12.

The Urban Growth Area boundary (UGA) divides NSD, creating capacity utilization challenges. As new residential development continues to occur even at more 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 via a Conditional Use Permit (CUP) process.

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. 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. NSD appreciates any opportunity for cooperative planning efforts with its jurisdictions.

Student Enrollment Trends and Forecasts

Section 2

Background

Elementary enrollment in NSD has grown steadily in recent years, with a slight dip in 2020 and 2021 reflecting the global pandemic. Growth increases in recent years are a result of larger birth cohorts and a consistent increase in new residential development. This wave of elementary enrollment growth is beginning to move into the middle and high school grades and is anticipated to continue over the next 10 years. At the same time, elementary enrollment is projected to grow within and beyond the next 5 years.

Similar to past years, this year's forecasts consider regional and local trends in population growth, birth rates, and housing development, analyzing corresponding projections down to the school feeder pattern level. Growth rates were adjusted based on permit information specific to those respective areas. The resulting trends were used to further refine the projection methodology for enrollment forecasts. The following section describes in more detail the assumptions used to develop the forecast and compares the result of this projection to other available methodologies.

While new single family home construction and sales within NSD are continuing to slow, there is a marked increase in the development of townhomes and continued strong development of apartments and condominiums. The new townhome developments include units with 3 bedrooms or more. From a student generation perspective, we are seeing enrollment numbers affected, with increases in the number of students generated from townhomes that have completed construction, been sold, and become occupied.

As of December 2021, development data shows 887 single family homes and 3,537 multi-family units in the development pipeline within the District. It is significant to note that 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 may impact enrollment, increasing what is forecast. In addition, if future adjustments are made to the UGA in Snohomish County, larger lots will once again become available to developers with the potential of increased NSD student enrollment.

Methodology

Numerous methodologies are available for projecting long-term enrollments. The most common method is known as the cohort survival method. This method tracks groups of students through the system and adjusts the population to account for the average year-to-year growth. For example, this year's fourth grade is adjusted based on the average enrollment trend of the past in order to estimate next year's fifth grade enrollment. This calculation method considers the past five years' trends to determine the average adjustment factor for each grade, or cohort. The method works well for all grades except kindergarten, for which there is no previous year data. For

kindergarten, two methodologies are generally used:

- A linear extrapolation from the previous five years of kindergarten enrollment, assuming that there is a trend;
- Or, alternatively, a comparison of the kindergarten enrollment to births from five years prior can be used to calculate a “birth-to-K” ratio. For example, kindergarten enrollment in 2021 is divided by the total births in King and Snohomish counties in 2016 to produce a “birth-to-K” ratio. The average ratio for the last five years can then be applied to births in subsequent years to estimate kindergarten enrollment.

OSPI uses the cohort survival method to predict enrollment for all school districts in the state for the limited purpose of the School Construction Assistance Program. The cohort survival method generally works well for districts that have a consistent trend of gradual increases or declines in enrollment. It is less reliable in districts where spikes in demographic trends (especially a marked increase or decrease in new housing) can lead to dramatic swings in enrollment from one year to the next. In addition, the use of the linear extrapolation method at the kindergarten level can result in a distorted trend since it does not consider changes in birth rate trends. The impact of COVID on enrollment has contributed to the cohort survival method being unreliable. This may continue for several years.

NSD works with professional demographers to combine the cohort survival methodology with other information about births, housing, regional population trends, mobility, and even trends in service area and private school enrollment. This modified cohort survival methodology provides a more accurate forecast. **Table 2.1** is a forecast of enrollment based on this model.

Mid-Range Enrollment Forecast

Table 2.1

Grade	Actual	Projections					
	21/22	22/23	23/24	24/25	25/26	26/27	27/28
K	1,622	1,636	1,602	1,586	1,567	1,531	1,572
1	1,603	1,743	1,807	1,735	1,726	1,710	1,671
2	1,751	1,658	1,818	1,866	1,792	1,780	1,763
3	1,776	1,746	1,674	1,836	1,894	1,815	1,803
4	1,733	1,784	1,772	1,699	1,873	1,928	1,847
5	1,727	1,731	1,795	1,784	1,719	1,891	1,947
6	1,791	1,729	1,757	1,807	1,810	1,734	1,907
7	1,745	1,801	1,760	1,773	1,825	1,831	1,754
8	1,786	1,751	1,795	1,763	1,777	1,832	1,838
9	1,800	1,843	1,775	1,829	1,797	1,814	1,870
10	1,850	1,792	1,836	1,776	1,831	1,802	1,820
11	1,653	1,734	1,689	1,740	1,684	1,739	1,711
12	1,582	1,605	1,692	1,657	1,706	1,654	1,709
Total	22,419	22,553	22,772	22,551	22,999	23,061	23,212
K - 5	10,212	10,298	10,468	10,506	10,571	10,655	10,603
6 - 8	5,322	5,281	5,312	5,343	5,412	5,397	5,499
9 - 12	6,885	6,974	6,692	7,002	7,018	7,009	7,110

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 “mid-range” projection. In total, the projected K-12 increase in enrollment is 793 students over the six-year period. The District’s enrollment projections were updated in February 2022 to consider the impacts of the global pandemic. 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 development within the pipeline, the District expects to see continued growth throughout the six-year planning period and beyond.

Long Range Forecasts

The modified cohort methodology described above was extrapolated to 2031 to produce a longer-range forecast (**Table 2.2**). Using this methodology, NSD’s enrollment shows continued growth from 2022 to 2031 of 839 students. This longer range model assumes that the state forecasts of births, K-12 growth, and continued population growth for the Puget Sound are reasonably accurate.

FTE Enrollment Forecast

Table 2.2

Grade Band	October 2022	October 2027	October 2031
Elementary	10,298	10,603	10,231
Middle	5,281	5,499	5,558
High	6,974	7,110	7,601
Total	22,553	23,211	23,390

Future growth trends are uncertain. Changes in population growth, fertility rates, new housing development slowdown, or a sharp downturn in the economic conditions in the Puget Sound region could have a major impact on long term enrollment, making it significantly lower or higher than the current estimate. Given this uncertainty, the current forecast should be considered a reasonable estimate based on the best information available, but subject to change as newer information about trends becomes available.

Snohomish County/OFM Forecasts

Using OFM/County data provided by Snohomish County, NSD projects a 2044 student FTE population of 30,924 (**Table 2.3**). For the six year period between 2016 and 2021, the District's actual enrollment averaged 39.7% of the OFM/County population estimates. Based on the 2020 Census data, the District's actual enrollment averaged 35.54% of the OFM/County population estimates. However, these figures are misleading in that they assumes 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.

FTE Enrollment Forecast – 2044 OFM Estimates*

Table 2.3

Grade Band	October 2021	October 2028	October 2044
Elementary	10,212	11,319	14,086
Middle	5,322	5,914	7,341
High	6,885	7,648	9,497
Total	22,419	24,881	30,924

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

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 constant review and assessment of programs, curriculum and instructional changes, student learning behaviors, learning environments, technological innovations and program development. Equitable access to programs for all students is also a school board driven goal and NSD is continually striving for process and methods in which all students have the ability to access the best learning environment. Additional variables include changes in mandatory requirements dictated by the state, such as full-day kindergarten, Core 24 graduation requirements, and reduced K-3 class size ratios. These elements, as well as demographic projections, are weighed when determining service levels.

Existing Programs and Standards of Service

NSD currently 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 noise, level of physical activity, teacher to student ratios, privacy, and/or the need for physical proximity to other services/facilities. Adequate space must exist for program flexibility, differing learning styles, program changes, project/problem-based learning and pre- and post-school activities. For example, service level capacities in rooms utilized in high schools 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 26 students per classroom.

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 Rooms	X	
Early Childhood Headstart (Federal)	X	X
ECEAP (State)		
Elementary Advanced Placement (EAP)	X	
Advanced Academic Placement (AAP)		X
Parents in Active Cooperative Education (PACE)	X	
Dual Language (DL)	X	
Special Education: <ul style="list-style-type: none"> • Learning Centers (LC) • Mid-Level (Sensory and Social Emotional at elementary. Positive Behavior Support at secondary.) • Mid-Level Blended • Functional Skills and Academics • Adult Transition Program (ATP) 	X	X
Learning Assistance Program (LAP)	X	X
Title I (elementary and middle school)		
English Learners (EL)	X	X
Northshore Network		
Northshore Family Partnership	X	X
Northshore Virtual Program		
Alternative School Program		X
Career Technical Education (CTE) <ul style="list-style-type: none"> • Includes specialized programs such as Automotive, Composites, Culinary Arts, Robotics, Sustainable Engineering and Design, Project Lead the Way, Aeronautics 		X
International Baccalaureate (IB)		
Advanced Placement (AP)		X
Running Start		X
College in the High School		X

Capacity is affected at those 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).

Teaching station loading is identified in **Table 3.2**. Class sizes are averages based on actual utilization as influenced by state funding and instructional program standards. NSD's standard of service is based on state and/or contractual requirements.

Standard of Service – Class Size

Table 3.2

Program a Classroom Serves	Elementary Target # of Students per Classroom	Middle Average Students per Classroom	High Average Students per Classroom
Base Standard, EAP, AAP, AP, IB	24	26	26
Early Childhood	16	NA	NA
Special Education Preschool	15	NA	NA
Kindergarten	22	NA	NA
Special Education Mid-Level Blended	12	NA	NA
Special Education Mid-Level Social Emotional	10	NA	NA
Special Education Sensory	10	NA	NA
Special Education Social Emotional	10	NA	NA
Special Education Mid-Level	12	10	10
Special Education Functional Skills and Academics	8	8	8
Special Education Positive Behavior Support	NA	10	10
CTE	NA	NA	NA
Alternative	NA	NA	15

Snohomish County requires that the District's plan include a report regarding NSD's compliance with the District's minimum levels of service for the school years 2019-2021. **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	2019- 2020	2020- 2021	2021- 2022
K – 5	489	24	22.2	21.4	20.9
6 – 8	212	26	26.0	25.4	25.1
9 – 12	303	26	21.8	22.5	22.7
Total / Average	1,004		23.3	23.1	22.9

Capital Facilities Inventory

Section 4

Inventory

Under the Growth Management Act, a public entity must periodically determine its capacity by conducting an inventory of its capital facilities. **Capacity** is a term that can be used in 3 different ways:

Design Capacity: The number of students a school was designed to hold.

Instructional Capacity: The design capacity is affected at buildings that house special programs or different grade levels. Some programs and grades require space modifications and frequently have lower class sizes. As a result, instructional capacity – **The true, functional capacity of a school for students**, is often lower than design capacity.

For example, an elementary school with 10 classrooms may have been designed for 300 students with 25 students in a classroom. However, the site might not be able to support the design capacity of 300 students for two primary reasons. The first is class size for different grade levels. For example, full-day Kindergarten classes become overloaded at 23 students. Instructional capacity can also be affected by programs in a school. Special Education often has several programs offered at each site. These programs have limited class sizes. The instructional capacity of a school must be recalculated every year to reflect the number of classrooms at different grade levels and the classrooms that hold special programs with limited class sizes.

Available Capacity: When the enrollment of a school is subtracted from the instructional capacity, the remaining number is the available capacity. **It represents how much room is left at a school for new students.**

If the available capacity is a negative number, that represents a school that has exceeded its instructional capacity. When this happens, class sizes may rise, or teachers may need to travel to find a room that is available for instruction.

Table 4.2 summarizes the instructional capacity owned and operated by the District. Information is also provided on relocatable classrooms (portables), school sites and other District owned facilities.

Variations in student instructional capacity between schools are often a result of the number of specialized programs offered at specific schools. As explained above, these programs require additional classroom space per student, which can reduce the instructional capacity of the school. Further, instructional capacities will change from year-to-year based on changes to existing programs, projected programs, and the resulting required space needed to deliver the instructional model at each site. To monitor this, and for use in preliminary instructional capacity planning, NSD establishes classroom design capacities for planning purposes. This is the maximum number of

students a school can accommodate based on a standard room capacity. These figures are then compared to the actual room utilization rate on a regular basis.

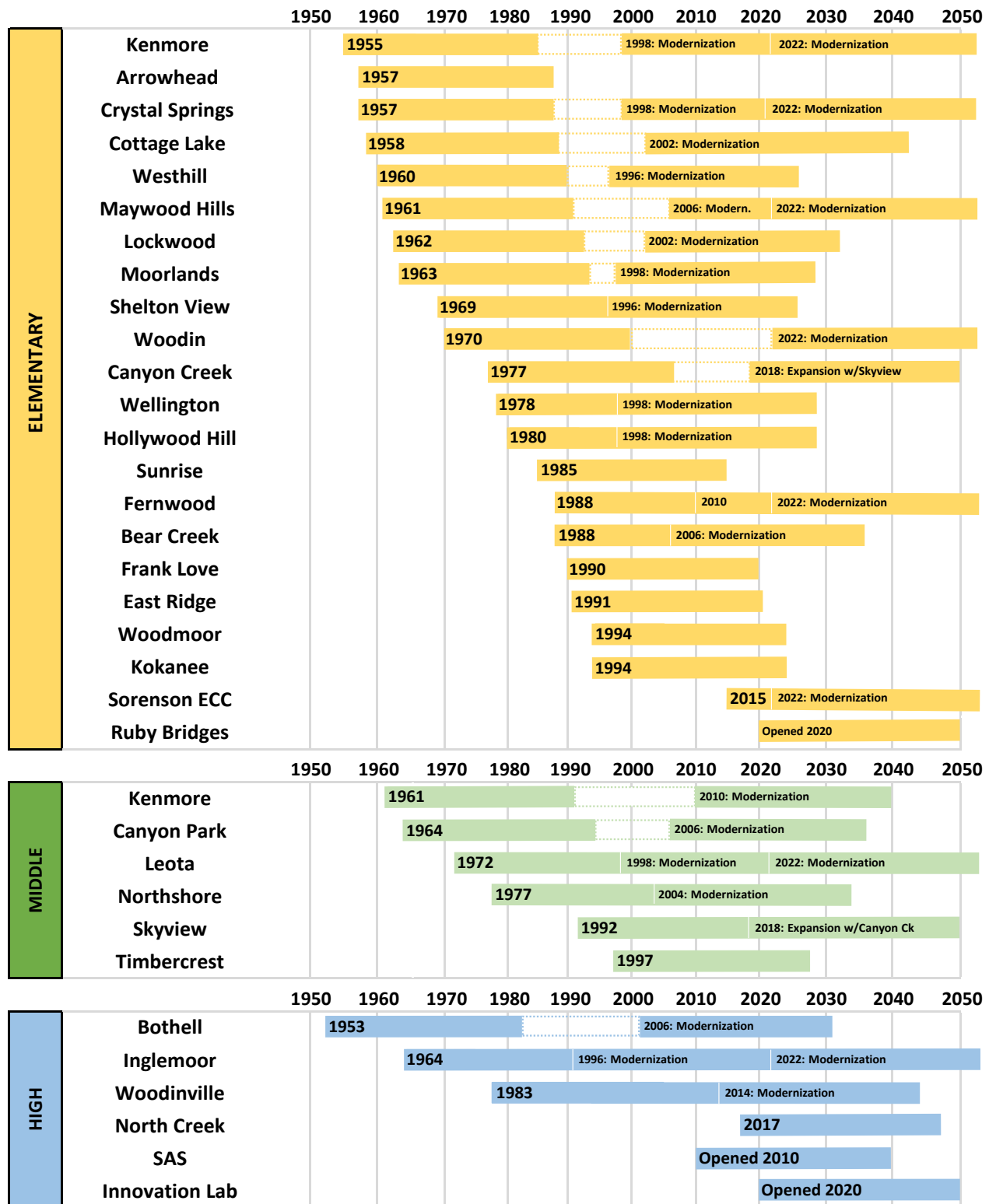
Capacity takes into consideration the specific programs that take place in each of the classrooms in a school every year. For example, capacities in rooms utilized for programs such as special education would reflect the defined service levels (**Table 3.2**), ranging from 8 to 26 students per room. Because of the need to provide planning time and space for teacher preparation or other required services, some facilities will only support a capacity utilization of 85%. In secondary schools, the utilization percentage may be higher. Capacities are updated annually in the CFP to reflect current program needs and classroom utilization.

Schools

Table 4.1 Illustrates the age of each school, the dates of modernizations and added capacity, and the historical timeline. **Table 4.2** shows the District’s permanent and portable instructional student capacity for the 2021-22 school year.

Historical Timeline of School Construction and Modernization

Table 4.1



2021-22 Instructional Capacity Inventory
Table 4.2

	Permanent Instructional Capacity	# of Instructional Portables	Total # of Portables	Portable Instructional Capacity	Instructional Portable % of Total Capacity	Total Instructional Capacity
Elementary						
Arrowhead	330	0	0	72	17.9	402
Bear Creek*						
Canyon Creek	856	12	12	240	21.9	1096
Cottage Lake	378	0	0	0	0	378
Crystal Springs	400	8	10	192	32.4	592
East Ridge	426	0	0	0	0	426
Fernwood	492	14	18	336	40.6	828
Frank Love	350	10	14	240	40.7	590
Hollywood Hill	428	0	0	0	0	428
Kenmore	330	5	9	144	30.4	474
Kokanee	446	15	12	264	37.2	710
Lockwood	544	4	6	96	15.0	640
Maywood Hills	400	8	10	216	35.1	616
Moorlands	568	10	9	216	27.6	784
Ruby Bridges	568	0	0	0	0	568
Shelton View	426	1	4	48	10.1	474
Sorenson ECC**		2	2			
Sunrise	452	0	0	24	5.0	476
Wellington	450	0	0	72	13.8	522
Westhill	328	7	9	168	33.9	496
Woodin	424	4	6	120	22.1	544
Woodmoor	688	0	0	0	0	688
Elementary Totals	9,284	100	121	2,448	20.9	11,732
Middle School						
Canyon Park	884	4		104	11.7	988
Kenmore	796	1		26	3.0	822
Leota	774	7	7	182	23.5	956
Northshore	862	4		104	12.0	966
Skyview	1,150	4		104	9.0	1,254
Timbercrest	796	0		0	0	796
Middle School Totals	5,262	20	7	520	9.87	5,782
High School						
Bothell	1,515	0	4			1,515
Inglemoor	1,338	6	6	156	11.6	1,494
North Creek	1,404	0				1,404
Woodinville	1,470	0				1,470
Innovation Lab	468	0				468
SAS	270	0				270
High School Total	6,465	6	10	156	2.4	6,621
K12 Totals	21,011	126	138	3,124	12.94%	24,135

**Sorenson Early Childhood Center serves students age 3-5 yrs and does not provide any capacity for K-5 grades;

*Bear Creek provides programs for the Northshore Family Partnerships/Northshore Network and does not provide regular capacity.

Relocatable Classroom Facilities (Portables)

Portable classrooms provide temporary/interim classroom space to house students until permanent facilities can be constructed and to prevent over-building of permanent capacity. Traditionally, 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.

Table 4.2 shows all instructional portables at each school. Not included in the interim classroom capacity are portables that are used for daycare, PTA, conference rooms/resource rooms, OT/PT, LAP, science or other labs, ASB, music or other non-instructional uses.

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. In some cases, portables may be moved from one grade band to another to address capacity needs. Future updates to the CFP will note any adjustments.

A typical portable classroom provides capacity for approximately 25 students at the elementary level or 26 at the secondary level. Portables are used to meet a variety of instructional needs. Of the 147 portable classrooms that the District owns, 121 are currently being used as classrooms for scheduled classes. The District's Enrollment Demographics Task Force (EDTF) has recommended that the District begin to phase out the increasing number of older portables as capacity allows, but with recent growth trends, the District continues to be reliant on this interim capacity. All portables are inspected regularly and upgraded as needed, or as systems require.

The lifespan of a portable is approximately 20 years and up to 25 years with aggressive 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 147 portables the district owns having reached 20 years of service. By 2026, 97 portables will be 20 years or older. Although the current bond replaces 67 aging portables, total capacity at schools with portables will be impacted in the future as the need to retire aging portables increases.

Other Facilities

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 4-4** below.

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

Table 4.4

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

*Note: Paradise Lake property is located in King County, outside the Urban Growth Area. In 2012, King County prohibited the siting of schools outside the UGA; although the property was purchased prior to that change, it is not currently useable as a potential school site.

**Note: The Wellington property is located in Snohomish County, adjacent to the Maltby Urban Growth Area. In 2015, a purchase and sale agreement was signed and entered into between Snohomish County and Northshore School District, but legal challenges ensued and closing of the property sale was delayed until October 2017. A settlement agreement was reached in 2019 and recorded under Snohomish County Recording No. 201906210221. The District has no active project at this site, nor are there definitive short or long-term plans for siting a school at this location.

Projected Facility Needs

Section 5

Planning History

In 2001, Northshore School District Board of Directors established a board policy to create a standing, community-based taskforce to study District-wide enrollment and demographic changes and the resulting impacts on school capacity needs, instructional programs, or other variables. The Enrollment Demographic Task Force (EDTF) examines enrollment projections, capacity considerations, student impacts, cost impacts, program needs, etc., and boundary adjustments based upon the above. The committee recommends potential solutions to the school board. If approved by the board, these recommended actions are implemented by the District and incorporated into the Capital Facilities Plan.

Using October 2021 enrollment figures, the District enrollment grew by over 1.5% or 1,134 new students during the previous six year period. The high school grade span has grown by over 740 new students in that time; an 11% increase. As noted above, October 2021 enrollment figures were down slightly due to the impacts of the pandemic but are expected to return to pre-2020 figures post-pandemic. To accommodate the District's growth, EDTF identified mitigation strategies (in order of priority) for the District to employ when addressing existing and future capacity needs (**Table 5.1**).

EDTF continues to monitor development and growth across the district and has noted that although development in some northern areas of the District is slowing down, development is increasing in the western and southern regions. EDTF applies capacity mitigation tools to ease overcrowding and balance enrollments where and when necessary, making recommendations to the Superintendent and School Board.

[Capacity Mitigation Tools](#)

Table 5.1

Shorter Lead Time
Utilize existing spaces more creatively
Adjust waiver policies
Adjust program placements
Move classes to schools with capacity
Move existing portables
Install new 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. 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 voters includes eight new projects to add permanent capacity across the District at all grade levels. Note that the number of new permanent classrooms is an early planning estimate. The District will be spending the next year working with architects and contractors to develop specific plans for each site. NSD will also take into consideration recent and future growth within each school's boundaries to inform any potential changes to the number of proposed classrooms.

- Inglemoor High School (IHS)
 - IHS currently has 6 portables on site. 5 portables are used for regular instruction and 1 is used for SPED instruction. The modernization project proposes replacing the 6 portables on site with permanent classrooms, and adding 10 additional permanent classrooms. Also proposed are a new athletic support space, a new commons, and a new main office complex to support increased capacity.
- Leota Middle School (LMS)
 - LMS currently has 7 portables on site. 4 portables are used for regular classroom instruction, 1 is used for SPED instruction, and 2 are for auxiliary classes. The modernization project proposes replacing the 7 portables with permanent classrooms, and adding 5 additional permanent classrooms. Also proposed are a new gym, commons, main office complex and improved site circulation to support increased capacity.
- Kenmore Elementary School
 - Kenmore currently has 9 portables on site. 5 portables are used for regular instruction. 4 are used for specialists and programs. The modernization project
 - proposes replacing the 9 portables with permanent classrooms, adding 2 additional permanent classrooms. Also proposed are a new gym, commons, main office complex, a fully inclusive playground, and improved site circulation to support increased capacity.
- Crystal Springs Elementary School
 - Crystal Springs currently has 10 portables on site. 8 portables are used for regular classroom instruction. 2 are used for specialists and programs. The modernization project proposes replacing those 10 portables with permanent classrooms, adding 2 additional permanent classrooms. Also proposed are a new gym, a fully inclusive playground, and improved site circulation to support increased capacity.

- Fernwood Elementary School
 - Fernwood currently has 18 portables on site. 14 are used for regular classroom instruction. 1 is a restroom portable. 3 are used for specialists and programs. The modernization project proposes replacing those 18 portables with permanent classrooms, adding 3 additional permanent classrooms including the conversion of the restroom portable to a classroom. Also proposed are an inclusive playground and improved site circulation to support increased capacity.
- Maywood Hills Elementary School
 - Maywood Hills currently has 10 portables on site. 8 are used for regular classroom instruction. 2 are used for specialists and programs. The modernization project proposes replacing those 10 portables with permanent classrooms, and adding 2 additional permanent classrooms. Also proposed are a new gym, a fully inclusive playground, and improved site circulation to support increased capacity.
- Woodin Elementary School
 - Woodin currently has 6 portables on site. 4 are used for regular classroom instruction. 2 are used for specialists and programs. The modernization project proposes replacing those 6 portables with permanent classrooms, and adding 6 additional permanent classrooms. Also proposed are a fully inclusive playground and improved site circulation to support increased capacity.
- 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 6 additional permanent classrooms. Also proposed are a fully inclusive playground to support increased capacity.

Long-term projections from 2021 – 2031 indicate growth of 971 new students, with fluctuation of growth at all grade levels, by 2031. The District will continue to monitor the factors that shape our capacity needs, i.e.; statewide legislative changes, instructional delivery requirements, the economy, changes in planned land use, changes in mandated program requirements, equitable access to programs, building permit activity, and birth rates, in order to help ensure needed instructional space is available when/where needed and will pursue additional land acquisition should construction of additional sites be necessary to accommodate those needs. Future updates to this CFP will include relevant information.

Table 5.2 summarizes the schools that will be undergoing construction as a result of the 2022 bond. Each project will include both capacity for growth and modernization of key systems and structures.

[Planned Construction Projects](#)

Table 5.2

Growth Projects	Estimated Completion Date	Projected Student Capacity Added
Partial renovations and permanent capacity additions to Crystal Springs, Fernwood, Kenmore, Maywood Hills, and Woodin Elementary	2025	1,608
Construct and equip Part 1 of Leota Middle School phased replacement	2026	312
Construct and equip Part 1 of Inglemoor High School phased replacement	2026	416
Classroom addition at Sorenson Early Childhood Center	2025	128

Portable Location Adjustments

Where growth results in capacity deficits at a specific grade band, portables may be relocated from one grade band to another to assist with meeting enrollment projections. In addition, the District may adjust program space within permanent facilities to move programs to portables to free up space in permanent facilities for additional regular student capacity. See **Section 4** for more detail regarding portables.

Capacity Analysis

The District's six-year capacity analysis, considering projected enrollment and planned new capacity, is shown in **Table 5.3**. 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 of 8 school sites. 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.

School Enrollment and Instructional Classroom Capacity

Table 5.3

	2021-22*	2022-23	2023-24	2024-25	2025-26	2026-27	2027-28
Elementary Enrollment	10,212	10,297	10,469	10,506	10,571	10,655	10,603
Permanent Capacity - Existing	9,284	9,284	9,284	9,284	10,340	10,892	10,892
New Permanent Capacity - Crystal Springs				288			
New Permanent Capacity - Fernwood				480			
New Permanent Capacity - Kenmore					264		
New Permanent Capacity - Maywood Hills					288		
New Permanent Capacity - Woodin				288			
Capacity in Portables	2,448	2,448	2,448	1,632	1,176	1,176	1,176
Total Capacity including Portables	11,732	11,732	11,732	11,972	12,068	12,068	12,068
Permanent Capacity over/(short)	(928)	(1,013)	(1,185)	(166)	321	237	289
Total Capacity w/Portables over/(short)	1,520	1,435	1,263	1,466	1,497	1,413	1,465
Middle School Enrollment	5,322	5,280	5,311	5,344	5,411	5,396	5,499
Permanent Capacity – Existing	5,262	5,262	5,262	5,262	5,574	5,574	5,574
New Permanent Capacity – Leota				312			
Capacity in Portables	520	520	520	338	338	338	338
Total Capacity including Portables	5,782	5,782	5,782	5,912	5,912	5,912	5,912
Permanent Capacity over/(short)	(60)	(18)	(49)	230	163	178	75
Total Capacity w/Portables over/(short)	460	502	471	568	501	516	446
High School Enrollment	6,885	6,974	6,992	7,002	7,017	7,009	7,110
Permanent Capacity -Existing	6,465	6,465	6,465	6,465	6,465	6,881	6,881
New Permanent Capacity - Inglesmoor					416		
Capacity in Portables	156	156	156	156	0	0	0
Total Capacity including Portables	6,621	6,621	6,621	6,621	6,881	6,881	6,881
Permanent Capacity over/(short)	(420)	(509)	(527)	(537)	(136)	(128)	(229)
Total Capacity w/Portables over/(short)	(264)	(353)	(371)	(381)	(136)	(128)	(229)
Total Enrollment	22,419	22,551	22,772	22,852	22,999	23,060	23,212
Permanent Capacity – Existing	21,011	21,011	21,011	21,011	22,379	23,347	23,347
Capacity in New Permanent Facilities				1,368	968		
Capacity in Portables	3,124	3,124	3,124	2,126	1,514	1,514	1,514
Total Capacity including Portables	24,135	24,135	24,135	24,505	24,861	24,861	24,861
Permanent Capacity over/(short)	(1,408)	(1,540)	(1,761)	(1,841)	(620)	287	135
Total Capacity with Portables over/(short)	1,716	1,584	1,363	1,653	2,200	1,801	1,650

*Actual October 2021 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.

For long-term planning purposes, a ten-year capacity analysis can be created. **Table 5.4** utilizes demographers' 10-year NSD 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.

Year 2031 – Long-term Forecast of Enrollment and Instructional Capacity

Table 5.4

Assumes added new capacity projects included in this CFP but no future near-term planning in process and no adjustment of portable facilities.

Grade Level	Enrollment	Permanent Capacity	Total Capacity	Permanent surplus/(short)	Total surplus/(short)
Elementary	10,231	9,284	11,732	(947)	1,501
Middle School	5,558	5,262	5,782	(296)	224
High School	7,601	6,465	6,621	(1,136)	(980)
Total	23,390	21,011	24,135	(2,379)	745

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%.

State School Construction Assistance

State financial assistance comes from the Common School Construction Fund. Bonds are sold on behalf of the fund then retired from revenues accruing predominantly from the sale of renewable resources (i.e. timber) from state school lands set aside by the Enabling Act of 1889. If these sources are insufficient to meet needs, the Legislature can appropriate General Obligation funds or the Superintendent of Public Instruction can prioritize projects for funding.

State financial assistance is available for qualifying school construction projects, however these funds may not be received until two to three years after a matched project has been completed. This requires the District to finance the complete project with local funds. Site acquisition and site improvements are not eligible to receive matching funds. These funds, as with all state funded programs, have been reduced, and given the current state budget, could be eliminated or eligibility criteria and funding formulas revised. Eligibility for state match is continually reviewed. 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 2022 and future planned expenditures. It does not include project expenditures from previous years.

8-Year Capital Facilities Expenditures Finance Plan
Table 6.1

\$\$ in MILLIONS	FY 21-22	FY 22-23	FY 23-24	FY 24-25	FY 25-26	FY 26-27	FY 27-28	FY 28-29
PROJECTS ADDING CAPACITY								
Inglemoor HS Concert Hall & Classrooms*	17.0							
SMS/CC Elem & MS Capacity Addition*	1.0							
Ruby Bridges Elementary (Maltby)*	1.0							
Innovation Lab High School (not bond funded)*	0.1							
Inglemoor High School Modernization*		5.0	60.0	30.0	5.0			
Leota Middle School Modernization*		3.0	36.0	18.0	3.0			
Crystal Springs Elementary Modernization*		1.5	18.5	9.2	1.5			
Fernwood Elementary Modernization*		1.5	18.5	9.2	1.5			
Kenmore Elementary Modernization*		1.5	18.5	9.2	1.5			
Maywood Hills Elementary Modernization*		1.9	22.2	11.1	1.9			
Woodin Elementary Modernization*		1.5	18.5	9.2	1.5			
Sorenson Early Childhood Center Modernization		0.6	7.2	3.6	0.6			
Future Middle School*					1.0	5.0	60.0	30.0
TOTAL PROJECTS ADDING CAPACITY	19.1	16.5	199.4	99.5	17.5	5.0	60.0	30.0
PROJECTS NOT ADDING CAPACITY								
Building Improvement Program	5.0	6.0	6.0	6.0	6.0	6.0	6.0	6.0
Technology	2.0	3.0	3.0	3.0	3.0	3.0	3.0	3.0
Fields/Inclusive Learning	1.0	3.0	3.0	3.0	3.0	3.0	3.0	3.0
Code Compliance/Small Works	2.0	4.0	4.0	4.0	4.0	4.0	4.0	4.0
Site Purchase/Circulation	2.0	1.0	1.0	1.0	1.0	1.0	1.0	1.0
Overhead/Bond Expenses	2.0	3.0	3.0	3.0	3.0	3.0	3.0	3.0
Security	1.0	3.0	3.0	3.0	3.0	3.0	3.0	3.0
TOTAL PROJECTS NOT ADDING CAPACITY	15.0	23.0	23.0	23.0	23.0	23.0	23.0	23.0
TOTAL PROJECT EXPENDITURES	34.1	39.5	222.4	122.5	40.5	28.0	83.0	53.0

* Signifies schools with growth-related capacity improvements and eligible for funding with impact fee revenue. Listed modernization projects include added permanent capacity for growth.

Note: Costs for Inglemoor High School do not reflect expenses from years prior to 2021-22. Total project cost is \$110M.

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 2021 CFP and are collecting impact fees identified in that plan. Snohomish County adopted the District's 2020 CFP and is collecting impact fees associated with that plan. We anticipate all the above jurisdictions to consider and adopt this 2022 CFP this fall either 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 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 both single family and multi-family and townhome units in early 2022. The townhome generation factor will be new with this 2022 plan. 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 increases in student generation rates from those units over time. In particular, the District’s student generation rates, when isolated for townhomes only, show that more students are residing in those units than in traditional multi-family units. 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**.

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 growth related construction projects, including added permanent capacity at: Inglemoor High School (416), Leota Middle School (312), Kenmore Elementary (264), Crystal Springs Elementary (288), Fernwood Elementary (480), Maywood Hills Elementary (288), and Woodin Elementary (288).

Proposed School Impact Fees
Snohomish County, City of Woodinville^

Single Family Units	\$17,963
Townhome Units	\$7,152
Multi-Family Units – 2+ Bedrooms	\$0

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

^The District does not request that Snohomish County adopt a MF 1 bedroom/less fee on its behalf.

Proposed School Impact Fees
King County, Bothell, Kenmore*

Single Family Units	\$17,963
Multi-Family Units (incl. Townhomes)	\$2,625

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

*If Bothell or Kenmore determine the Snohomish County model, segregating townhomes separately from other multi-family units, then the Snohomish County fee proposal applies.

Factors for Impact Fee Calculations

Student Generation Factors: Single Family

Elementary	0.341
Middle	0.124
High	0.138
K-12	0.604

Student Generation Factors: Multi-Family

Elementary	0.076
Middle	0.026
High	0.026
K-12	0.128

Student Generation Factors: Townhomes

Elementary	0.238
Middle	0.072
High	0.070
K-12	0.380

Student Generation Factors: Apartments

Elementary	0.018
Middle	0.010
High	0.010
K-12	0.038

Projected New Capacity

Inglemoor High School (416)
 Leota Middle School (312)
 Kenmore Elementary (264)
 Fernwood Elementary (480)
 Crystal Springs Elementary (288)
 Maywood Hills Elementary (288)
 Woodin Elementary (288)

Capacity/Construction Costs (in millions)

Inglemoor High School	\$110
Leota Middle School	\$60
Kenmore Elementary	\$30.7
Fernwood Elementary	\$30.7
Crystal Springs Elementary	\$30.7
Maywood Hills Elementary	\$37.1
Woodin Elementary	\$30.7

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	42.18%
Current Construction Cost Allocation	246.83
OSPI Sq/Ft/Student	
ES:	90
MS:	108
HS:	130

Tax Payment Credit

Single Family AAV	\$1,405,644
Multi-Family Unit AAV	\$464,849

Debt Service Rate

Current/\$1,000	\$1.47967
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GO Bond Interest Rate – Bond Buyer Index

Avg – Feb. 2022	\$2.45
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Developer Provided Sites/Facilities

None

APPENDIX A

2022 Student Generation Factors from New Development

All Units Constructed 2016 - 2020 (5 years)

Grade	Single-Family 2,574 Units		Multi-Family 3,296 Units	
	Students	Factor	Students	Factor
K	157	0.061	39	0.012
1	143	0.056	48	0.015
2	163	0.063	40	0.012
3	161	0.063	37	0.011
4	135	0.052	40	0.012
5	119	0.046	46	0.014
6	110	0.043	31	0.009
7	119	0.046	23	0.007
8	91	0.035	32	0.010
9	103	0.040	25	0.008
10	91	0.035	30	0.009
11	81	0.031	16	0.005
12	81	0.031	14	0.004
K-5	878	0.341	250	0.076
6-8	320	0.124	86	0.026
9-12	356	0.138	85	0.026
K-12	1,554	0.604	421	0.128

Grade	Townhome 866 Units		Apartments 2,430 Units	
	Students	Factor	Students	Factor
K	31	0.036	8	0.003
1	42	0.048	6	0.002
2	31	0.036	9	0.004
3	28	0.032	9	0.004
4	32	0.037	8	0.003
5	42	0.048	4	0.002
6	23	0.027	8	0.003
7	18	0.021	5	0.002
8	21	0.024	11	0.005
9	21	0.024	4	0.002
10	17	0.020	13	0.005
11	13	0.015	3	0.001
12	10	0.012	4	0.002
K-5	206	0.238	44	0.018
6-8	62	0.072	24	0.010
9-12	61	0.070	24	0.010
K-12	329	0.380	92	0.038

APPENDIX B.1

School Impact Fee Calculation: **Single Family Dwelling Unit**
Northshore School District, 2022 CFP

School Impact Fee Calculation - Single Family Dwelling Unit
Northshore School District 2022 CFP

School Site Acquisition Cost:

	<u>Site Size Acreage</u>	<u>Cost/ Acre</u>	<u>Facility Size</u>	<u>Site Cost/ Student</u>	<u>Student Factor</u>	<u>Cost/ SFDU</u>
Elementary	0	\$0	1608	\$0	0.3410	\$0
Middle	0	\$0	312	\$0	0.1240	\$0
Senior	0	\$0	416	\$0	0.1380	\$0
TOTAL						\$0

School Construction Cost:

	<u>Sq. Ft. % Permanent</u>	<u>Facility Cost</u>	<u>Facility Size</u>	<u>Bldg. Cost/ Student</u>	<u>Student Factor</u>	<u>Cost/ SFDU</u>
Elementary	94.55%	\$109,900,000	1608	\$68,346	0.3410	\$22,036
Middle	94.55%	\$42,000,000	312	\$134,615	0.1240	\$15,783
Senior	94.55%	\$70,000,000	416	\$168,269	0.1380	\$21,956
TOTAL						\$59,774

Temporary Facility Cost:

	<u>Sq. Ft. % Temporary</u>	<u>Facility Cost</u>	<u>Facility Size</u>	<u>Bldg. Cost/ Student</u>	<u>Student Factor</u>	<u>Cost/ SFDU</u>
Elementary	5.45%	\$0	25	\$0	0.3410	\$0
Middle	5.45%	\$0	25	\$0	0.1240	\$0
Senior	5.45%	\$0	25	\$0	0.1380	\$0
TOTAL						\$0

State School Construction Funding Assistance Credit:

	<u>Const Cost Allocation</u>	<u>OSPI Sq. Ft./ Student</u>	<u>Funding Assistance</u>	<u>Credit/ Student</u>	<u>Student Factor</u>	<u>Cost/ SFDU</u>
Elementary	246.83	90.0	42.18%	\$9,370	0.3410	\$3,195
Middle	246.83	108.0	42.18%	\$11,244	0.1240	\$1,394
Senior	246.83	130.0	42.18%	\$13,535	0.1380	\$1,868
TOTAL						\$6,457

School Impact Fee Calculation - Single Family Dwelling Unit
Northshore School District 2022 CFP

Tax Payment Credit Calculation:

Average SFR Assessed Value	\$1,405,649
Current Capital Levy Rate/\$1000	\$1.41
Annual Tax Payment	\$1,981.80
Years Amortized	10
Current Bond Interest Rate	2.45%
Present Value of Revenue Stream	\$17,390

Impact Fee Summary - Single Family Dwelling Unit:

Site Acquisition Cost	\$0
Permanent Facility Cost	\$59,774
Temporary Facility Cost	\$0
State SCFA Credit	(\$6,457)
Tax Payment Credit	(\$17,390)
Unfunded Need	\$35,927
50% Required Adjustment	\$17,963
Single Family Impact Fee	\$17,963

APPENDIX B.2

School Impact Fee Calculation: **Townhome Dwelling Unit**
Northshore School District, 2022 CFP

School Impact Fee Calculation - Townhomes
Northshore School District 2022 CFP

School Site Acquisition Cost:

	<u>Site Size Acreage</u>	<u>Cost/ Acre</u>	<u>Facility Size</u>	<u>Site Cost/ Student</u>	<u>Student Factor</u>	<u>Cost/ THDU</u>
Elementary	0	\$0	1608	\$0	0.2380	\$0
Middle	0	\$0	312	\$0	0.0720	\$0
Senior	0	\$0	416	\$0	0.0700	\$0
TOTAL						\$0

School Construction Cost:

	<u>Sq. Ft. % Permanent</u>	<u>Facility Cost</u>	<u>Facility Size</u>	<u>Bldg. Cost/ Student</u>	<u>Student Factor</u>	<u>Cost/ THDU</u>
Elementary	94.55%	\$109,900,000	1608	\$68,346	0.2380	\$15,380
Middle	94.55%	\$42,000,000	312	\$134,615	0.0720	\$9,164
Senior	94.55%	\$70,000,000	416	\$168,269	0.0700	\$11,137
TOTAL						\$35,681

Temporary Facility Cost:

	<u>Sq. Ft. % Temporary</u>	<u>Facility Cost</u>	<u>Facility Size</u>	<u>Bldg. Cost/ Student</u>	<u>Student Factor</u>	<u>Cost/ THDU</u>
Elementary	5.45%	\$0	25	\$0	0.2380	\$0
Middle	5.45%	\$0	25	\$0	0.0720	\$0
Senior	5.45%	\$0	25	\$0	0.0700	\$0
TOTAL						\$0

State School Construction Funding Assistance Credit:

	<u>Const Cost Allocation</u>	<u>OSPI Sq. Ft./ Student</u>	<u>Funding Assistance</u>	<u>Credit/ Student</u>	<u>Student Factor</u>	<u>Cost/ THDU</u>
Elementary	246.83	90.0	42.18%	\$9,370	0.2380	\$2,230
Middle	246.83	108.0	42.18%	\$11,244	0.0720	\$810
Senior	246.83	130.0	42.18%	\$13,535	0.0700	\$947
TOTAL						\$3,987

School Impact Fee Calculation - Townhomes
Northshore School District 2022 CFP

Tax Payment Credit Calculation:

Average SFR Assessed Value	\$1,405,649
Current Capital Levy Rate/\$1000	\$1.41
Annual Tax Payment	\$1,981.80
Years Amortized	10
Current Bond Interest Rate	2.45%
 Present Value of Revenue Stream	 \$17,390

Impact Fee Summary - Townhome Dwelling Unit:

Site Acquisition Cost	\$0
Permanent Facility Cost	\$35,681
Temporary Facility Cost	\$0
State SCFA Credit	(\$3,987)
Tax Payment Credit	(\$17,390)
 Unfunded Need	 \$14,304
 50% Required Adjustment	 \$7,152
 Townhome Impact Fee	 \$7,152

APPENDIX B.3

School Impact Fee Calculation: **Multi-Family Dwelling Unit**
(Townhome, Apartment, Condo blend)

Northshore School District, 2022 CFP

School Impact Fee Calculation - Multi-Family Dwelling Unit

Northshore School District 2022 CFP
(Townhomes, Apartments, Condos)

School Site Acquisition Cost:

	<u>Site Size Acreage</u>	<u>Cost/ Acre</u>	<u>Facility Size</u>	<u>Site Cost/ Student</u>	<u>Student Factor</u>	<u>Cost/ MFDU</u>
Elementary	0	\$0	1608	\$0	0.0760	\$0
Middle	0	\$0	312	\$0	0.0260	\$0
Senior	0	\$0	416	\$0	0.0260	\$0
TOTAL						\$0

School Construction Cost:

	<u>Sq. Ft. % Permanent</u>	<u>Facility Cost</u>	<u>Facility Size</u>	<u>Bldg. Cost/ Student</u>	<u>Student Factor</u>	<u>Cost/ MFDU</u>
Elementary	94.55%	\$109,900,000	1608	\$68,346	0.0760	\$4,911
Middle	94.55%	\$42,000,000	312	\$134,615	0.0260	\$3,309
Senior	94.55%	\$70,000,000	416	\$168,269	0.0260	\$4,137
TOTAL						\$12,357

Temporary Facility Cost:

	<u>Sq. Ft. % Temporary</u>	<u>Facility Cost</u>	<u>Facility Size</u>	<u>Bldg. Cost/ Student</u>	<u>Student Factor</u>	<u>Cost/ MFDU</u>
Elementary	5.45%	\$0	25	\$0	0.0760	\$0
Middle	5.45%	\$0	25	\$0	0.0260	\$0
Senior	5.45%	\$0	25	\$0	0.0260	\$0
TOTAL						\$0

State School Construction Funding Assistance Credit:

	<u>Const Cost Allocation</u>	<u>OSPI Sq. Ft./ Student</u>	<u>Funding Assistance</u>	<u>Credit/ Student</u>	<u>Student Factor</u>	<u>Cost/ MFDU</u>
Elementary	246.83	90.0	42.18%	\$9,370	0.0760	\$712
Middle	246.83	108.0	42.18%	\$11,244	0.0260	\$292
Senior	246.82	130.0	42.18%	\$13,534	0.0260	\$352
TOTAL						\$1,356

School Impact Fee Calculation - Multi-Family Dwelling Unit

Northshore School District 2022 CFP
(Townhomes, Apartments, Condos)

Tax Payment Credit Calculation:

Average MFR Assessed Value	\$464,849
Current Capital Levy Rate/\$1000	\$1.41
Annual Tax Payment	\$655.38
Years Amortized	10
Current Bond Interest Rate	2.45%
Present Value of Revenue Stream	\$5,751

Impact Fee Summary - Multi-Family Dwelling Unit:

Site Acquisition Cost	\$0
Permanent Facility Cost	\$12,357
Temporary Facility Cost	\$0
State SCFA Credit	(\$1,356)
Tax Payment Credit	(\$5,751)
Unfunded Need	\$5,250
50% Required Adjustment	\$2,625

Multi-Family Impact Fee	\$2,625
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Snohomish School District

1601 Avenue D
Snohomish, Washington 92890
(360) 563-7239

CAPITAL FACILITIES PLAN
2022 – 2027

Adopted July 27, 2022

Snohomish School District

CAPITAL FACILITIES PLAN

Board of Directors

Jay Hagen, President

Shaunna Ballas, Vice President

Josh Seek

Dr. Sara Fagerlie

Brandy Hekker

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 2022-2027.

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 2020 GMA-based CFP that was adopted by the District and the County in 2020.

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 9,256¹ 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 and Early Childhood Education and Assistance Program (ECEAP) programs, ten elementary schools (one grades K-2, one grades 3-6 and eight grades K-6), two middle schools (grades 7 and 8), two high schools (grades 9-12), and one alternative school (grades 9-12) (AIM), and a Parent Partnership Program (PPP) (grades K-12).

The District opened Glacier Peak High School in the fall of 2008. The District’s voters approved a construction bond in May 2008 to fund the renovation of Snohomish High School, the replacement of Valley View Middle School, the expansion of Centennial Middle School, the replacement/expansion of Machias and Riverview elementary schools, construction of a new aquatics center, and technology improvements. All of these projects are now complete.

The District convened a Citizens’ Facility Advisory Committee (CFAC) in 2019 to review the conditions of our school buildings, explore demographic and enrollment projections and prioritize needs. Based on this information, the CFAC recommended, and the Board authorized for the February 2020 ballot, a \$470 million bond proposal to fund six elementary school replacement

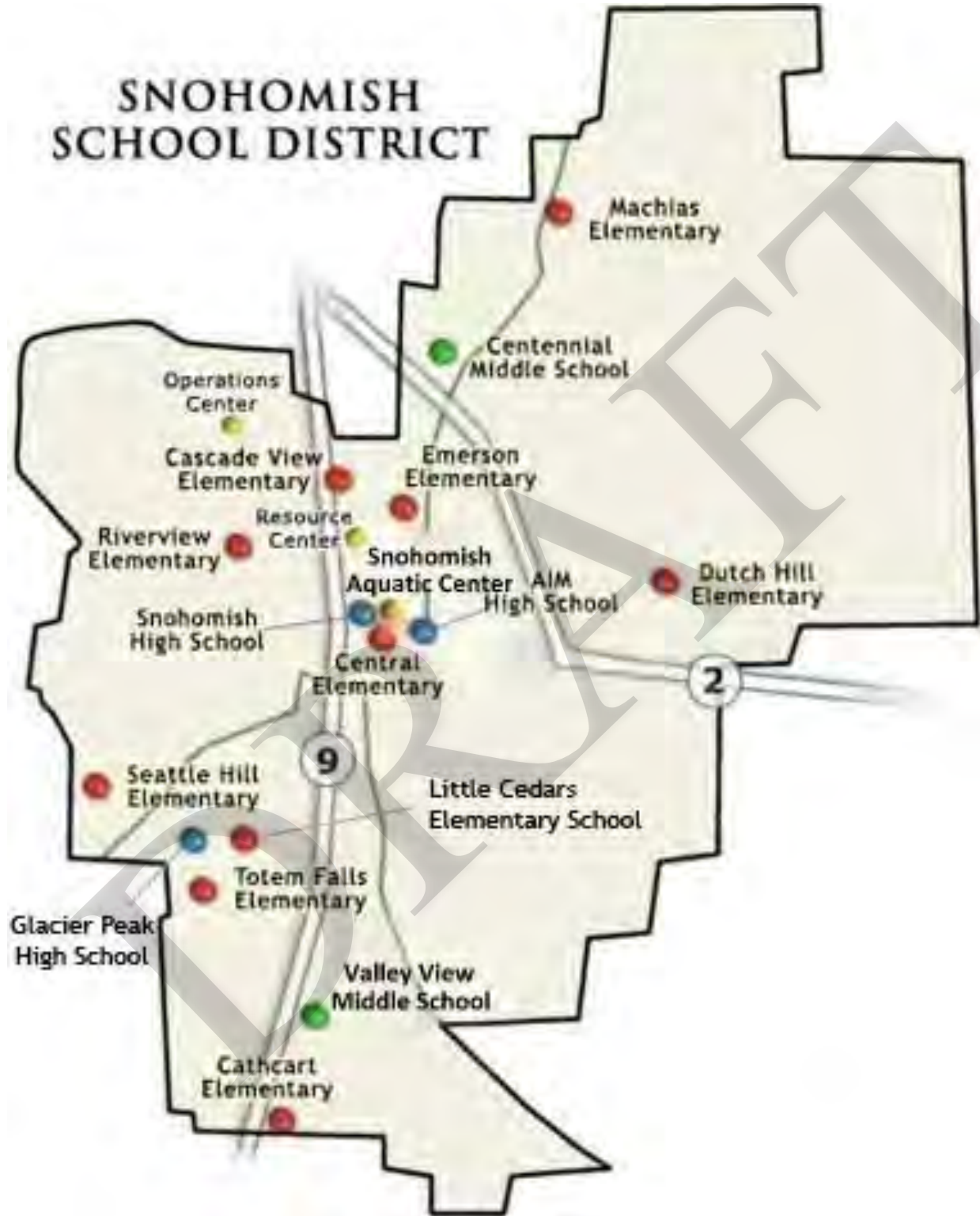
¹ October 1, 2021 FTE. Unless otherwise noted, all enrollment and student capacity data in this CFP is expressed in terms of FTE (full time equivalent).

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 ESL programs.

Educational Program Standards for Middle and High Schools

- Educational programs will be provided in a single shift each day. The facility will be available after normal hours for extra-curricular activities and for extended learning opportunities (remedial education) for selected students.
- Educational programs will be provided on a traditional school year schedule.
- As a result of scheduling conflicts for student programs, the need for specialized rooms for certain programs, and the need for teachers to have a workspace during planning periods, it is

not possible to achieve 100% utilization of all regular teaching stations throughout the day. Therefore, classroom capacity should be adjusted to reflect the use of one period per day for teacher planning.

- Special education for students may be provided in a self-contained classroom.
- Specialized work spaces for testing, specialists (i.e. OTPT/SLP's/psychologists), remedial programs, small group tutoring, and ESL programs.
- Identified students will also be provided other nontraditional educational opportunities in classrooms designated as follows:
 - Vocational Classrooms (i.e. business, manufacturing, biotechnology, CAD)
 - Program Specific Classrooms (i.e. music, drama, art, physical education, technology)
 - High School Academies
 - Alternative High School Programming

Minimum Educational Service Standards

The District will evaluate student housing levels based on the District as a whole system and not on a school by school or site by site basis. This may result in portable classrooms being used as interim housing, attendance boundary changes or other program changes to balance student housing across the system as a whole, while meeting the District's paramount duties under the State Constitution. A boundary change or a significant programmatic change would be made by the District's Board of Directors following appropriate public review and comment.

The District's intent is to adhere to the target facility service standards noted above without making significant changes in program delivery. At a minimum, average class size in the grade K-8 classrooms will not exceed 35 students and average class size in 9-12 classrooms will not exceed 40 students. The foregoing average class sizes set forth the District's "minimum level of service." For purposes of this determination, the term "classroom" does not include special education classrooms or special program classrooms (i.e. computer labs, art rooms, chorus and band rooms, spaces used for physical education, and other special program areas). Furthermore, the term "classroom" does not apply to special programs or activities that may occur in a regular classroom or to classes held in assembly halls, gyms, cafeterias, or other common areas.

The minimum educational service standards are not the District's desired or accepted operating standard.

For the school years of 2019-20 and 2020-21, the District's compliance with the minimum educational service standards (as applicable for those years) is as follows:

2019-20 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	22.65	35	17.1	40	22.95

2020-21 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	20.63	35	16.53	40	22.46

*The District determines these figures by taking the sum of all students in regular classrooms at a grade level and dividing that by the number of teaching stations at that grade level.

SECTION 3: CAPITAL FACILITIES INVENTORY

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

Schools

The District currently has ten (10) elementary schools (one grades K-2, one grades 3-6 and eight grades K-6), two (2) middle schools (grades 7-8), and two high schools (grades 9-12). Machias and Riverview Elementary Schools and Valley View and Centennial Middle Schools were renovated and expanded in 2011 and 2012. The District had an additional facility, the Maple Avenue Campus (the former "Freshman Campus"), which was used as interim capacity to accommodate the District's renovation program, but it has been demolished and replaced by the Aquatic Center.

School capacity is based on the number of teaching stations within each building and the space requirements of the District's adopted educational program. The school capacity inventory is summarized in Tables 1, 2, and 3.

**Table 1
Elementary School Capacity Inventory**

Elementary School	Site Size (acres)	Bldg Area (Sq. Ft.)	Teaching Stations(1)	Permanent Capacity (2)	Capacity with Portables	Year Built or Last Remodel	Potential for Expansion of Perm. Facility (3)
Cascade View	10.5	45,629	18	359	413	1990	yes
Cathcart	12.8	36,231	19	420	474	1994	yes
Central Primary	4.5	45,239	10	204	204	1994	yes
Dutch Hill	13.9	42,357	24	356	626	1985	yes
Emerson	6.9	40,038	13	375	375	1989	yes
Little Cedars	11.3	76,071	31	621	711	2007	yes
Machias	9.2	78,137	23	481	526	2011	yes
Riverview	9.6	78,740	25	515	542	2011	no
Seattle Hill	9.7	42,357	29	405	666	1982	yes
Totem Falls	10.0	44,877	18	376	376	1991	yes
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

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 68 portables at various sites throughout the District. The number of portables and their capacities are summarized in Table 4.

Table 4			
School Name	Portables		Capacity
	Classrooms	Other	
ELEMENTARY:			
Cascade View	2	3	54
Cathcart	2	4	54
Central Primary	0	2	0
Dutch Hill	10	1	270
Emerson		4	0
Machias	2		45
Riverview	1	3	27
Seattle Hill	10	3	261
Totem Falls	0	6	0
Little Cedars	5	2	90
Total	32	28	801
MIDDLE:			
Centennial	0	0	0
Valley View	0	0	0
Total	0	0	0
HIGH			
Snohomish	0	0	0
Glacier Peak	8	0	192
Total	8	0	192
GRAND TOTAL	40	28	993

Each portable classroom is 896 square feet.

The District portables identified in Table 4 have adequate useful remaining life and are evaluated regularly.

Support Facilities

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

Table 5
Support Facilities

Facility Name	Building Area (Sq. Ft.)	Site Size (Acres)
Operations Center^	15,073	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

^In process of demolition and replacement by summer 2022;

new square footage will equal 15,673 (including maintenance and transportation).

**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, 2021 FTE enrollment was 9,256. 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 9,638, or an increase of 4.127%. 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 2022 and 2027, 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 10,071 students in 2027. See Table 6.

Table 6									
Comparison of Student Enrollment Projections 2021-2027									
Projection	October 2021*	2022	2023	2024	2025	2026	2027	Projected Change 2021-2027	Percent Change 2021-2027
County/OFM**	9,256	9,393	9,528	9,664	9,800	9,936	10,071	815	8.8%
District	9,256	9,287	9,388	9,469	9,508	9,587	9,638	382	4.127%
Total Population Projection for District (OFM)							64,190		
Student to Population Ratio	15.69%								

*Actual Oct 2021 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 2027 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 2021	Projected Enrollment 2044**
Elementary (K-6)	4,488	5,515
Middle School (7-8)	1,423	1,748
High School (9-12)	3,345	4,111
TOTAL (K-12)	9,256	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 2021 and 2044.

SECTION 5: CAPITAL FACILITIES NEEDS

Facility Needs (2022-2027)

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 (2022-2027).

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 2022-2027. 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
2022-2027**

Grade Span	2021*	2022	2023	2024	2025	2026	2027	Pct. Growth Related
Elementary (K-6)								
Total	376**	515	626	814	900	956	960	
Growth Related		139	250	438	524	580	584	60.83%
Middle School (7-8)								
Total	---	---	---	---	---	---	---	
Growth Related	--	--	--	--	--	--	--	--%
High School								
Total	---	---	---	---	---	---	---	
Growth Related	--	--	--	--	--	--	--	--%

* Actual 2021 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 (2027-2028), additional permanent classroom capacity will be needed as follows:

Table 9
Estimated Unhoused Students (2027-2028)*

Grade Span	Unhoused Students (Post-2021 Growth Related)	Unhoused Students (Pre-2021 Existing and Recent-Growth Related)
Elementary (K-6)	584	960
Middle School (7-8)	--	--
High School (9-12)	--	--
TOTAL UNHOUSED (K-12)	584	984

*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 2022 ballot, a \$470 million bond proposal to fund six elementary school replacement projects (including adding capacity), added classrooms at Glacier Peak High School to reduce portable reliance, an early learning center at the existing Central Primary Center facility, and improvements at the Parkway Campus as well as the District’s maintenance and transportation facilities. The bond also proposed safety and security improvements throughout the District. The District failed to achieve the required 60% margin for bond approval.

The District, in view of current and anticipated capacity needs, is continuing to plan for elementary capacity additions during the six-year planning period and beyond. The District may also purchase and site new portable facilities to address capacity needs.

Elementary Schools

The District opened Little Cedars Elementary School with a permanent capacity of 621, with 27 teaching stations. The elementary was completed and put into use for the 2007-08 school year. The total cost of the new elementary school was approximately \$25.0 million excluding the land purchase.

In addition, the District requested as a component of its 2008 bond proposal to replace and expand two elementary schools, Machias and Riverview. The projects are complete and the capacity of the two schools was expanded from 481 and 515 respectively to 600 each. These schools opened at the new capacity in January of 2011.

This CFP includes planning for classroom additions as a part of replacement projects at 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 plans to add two portable classrooms at Dutch Hill in the summer of 2022. 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

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

General Obligation Bonds

Bonds are typically used to fund construction of new schools and other capital improvement projects. A 60% voter approval is required to approve the issuance of bonds. Bonds are then retired through collection of property taxes. Snohomish School District voters rejected a bond proposal in 2001 for \$14.5 million to finance the acquisition of sites, planning for a new elementary school, planning for a new high school, the acquisition of modular classrooms, and the purchase and installation of technology equipment and systems.

Voters in May of 1998 approved a \$3.9 million bond issue to construct 11 classrooms at Snohomish High School and to finance mechanical and technology improvements throughout the District. On March 14, 2000, Snohomish School District voters approved a \$6.12 million dollar bond issue to finance certain capital improvements to the District's educational facilities.

In March of 2003, the school board appointed a 35-member Citizens' Facilities Advisory Committee to complete an in-depth study of our school facilities. This committee found that Snohomish schools are overcrowded and reported that half of our school buildings are at or near the end of their useful life. The committee then created a long-range plan for school construction, modernization and renovation to address those issues.

The District's voters approved a \$141,570,000 bond issue on May 18, 2004, to fund a new high school, modernization of the existing Snohomish High School, a new elementary school, acquisition of two new school sites, and various health, safety, energy and infrastructure improvements throughout the District.

The District's voters approved a \$261.6 million bond in May 2008 to fund the renovation of Snohomish High School, the renovation/expansion of Valley View Middle School, the expansion of Centennial Middle School, the replacement/expansion of Machias and Riverview elementary schools, construction of a new aquatics center, to make District-wide capital improvements, and acquire classroom technology to improve student learning.

The District's voters considered in February 2020 but did not approve a \$470 million bond proposal to fund six elementary school replacement projects (including adding capacity), added classrooms at Glacier Peak High School to reduce portable reliance, an early learning center at the existing Central Primary Center facility, and improvements at the Parkway Campus as well as the District's maintenance and transportation facilities. The bond also proposed safety and security improvements throughout the District.

State School Construction Assistance

State School Construction Assistance funds come from the Common School Construction Fund. The State deposits revenue from the sale of renewable resources from State school lands set aside by the Enabling Act of 1889 into the Common School Account. If these sources are insufficient to meet needs, the Legislature can appropriate General Obligation Bond funds or the Superintendent of Public Instruction can prioritize projects for funding. School districts may qualify for State School Construction Assistance funds for specific capital projects based on a prioritization system. For eligible projects, the District's funding level under the State School Construction Assistance fund is at the 56.04% percentage level (July 2022 release).

Impact Fees

Development impact fees are a means of supplementing traditional funding sources for construction of public facilities needed to accommodate new development. School impact fees are generally collected by the permitting agency at the time plats are approved or building permits are issued. (See additional discussion in Section 7).

Six Year Financing Plan

The Six-Year Financing Plan shown in Table 10 demonstrates how the District intends to fund new construction and improvements to school facilities for the years 2022-2027. 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)

	2022	2023	2024	2025	2026	2027	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				\$45,100	\$34,700		\$79,700	X	X		X	X
District wide Capital Improvements (including portables)	\$300	\$300	\$300				\$900	X			X	X

*Reflects total projects costs using 2022 estimates, subject to escalation. The impact fees are calculated based on construction costs only with anticipated escalation. Construction costs for the impact fee calculation reflect average construction costs of the three elementary school capacity projects, with replacements average total capacity of 600 seats..

Table 11 - Projected Student Capacity (2022-2027)**Elementary School Surplus/Deficiency**

	2021	2022	2023	2024	2025	2026	2027
Permanent Capacity	4,112	4,112	4,112	4,112	4,112	4,112	4,731
Added Capacity						619^	
Portable Capacity	801	855*	855	855	855	855	855
Total Capacity	4,913	4,967	4,967	4,967	4,967	5,586	5,586
Enrollment	4,488	4,627	4,738	4,926	5,012	5,068	5,072
Surplus (Deficiency) – Permanent Capacity	(376)	(515)	(626)	(814)	(900)	(337)	(342)
Surplus (Deficiency) – All Capacity**	425	340	229	41	(45)	518	514

^Capacity additions resulting from replacement and expansion of Cathcart, Dutch Hill, and Seattle Hill Elementary Schools

*Added portables at Dutch Hill (summer 2022)

**Except as specifically noted, does not reflect addition or removal of portable facilities over the planning period.

Middle School Surplus/Deficiency

	2021	2022	2023	2024	2025	2026	2027
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	1,423	1,365	1,359	1,340	1,356	1,470	1,521
Surplus (Deficiency) – Permanent Capacity	427	485	491	510	494	380	329
Surplus (Deficiency) – All Capacity***	427	485	491	510	494	380	329

**Except as specifically noted, does not reflect addition or removal of portable facilities over the planning period.

High School Surplus/Deficiency

	2021	2022	2023	2024	2025	2026	2027
Permanent Capacity	3,400	3,400	3,400	3,400	3,400	3,400	3,400
Added Capacity							
Portable Capacity	192	192	192	192	192	192	192
Total Capacity	3,592	3,592	3,592	3,592	3,592	3,592	3,592
Enrollment	3,345	3,295	3,291	3,204	3,140	3,049	3,045
Surplus (Deficiency) – Permanent Capacity	55	105	109	196	260	351	355
Surplus (Deficiency) – All Capacity***	247	301	301	388	452	543	547

**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 the following residential unit types: single family; multi-family/studio or 1-bedroom; and multi-family/2-bedroom or more.

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

Methodology and Variables Used to Calculate School Impact Fees

Impact fees are calculated utilizing the formula in the Snohomish County Impact Fee Ordinance. The resulting figures are based on the District’s cost per dwelling unit to, as applicable, purchase land for school sites, make site improvements, construct schools, and purchase/install relocatable facilities that add interim capacity needed to serve new development. A student factor (or student generation rate) is used to identify the average cost per dwelling unit by measuring the average number of students generated by each housing type (single-family dwellings and multi-family dwellings of one bedroom and two bedrooms or more). A description of the student factor methodology is contained in Appendix B. As required under the GMA, credits are applied in the formula to account for State School Construction Assistance funds expected to be reimbursed to the District and projected future property taxes to be paid by the dwelling unit toward a capital levy/bond that would fund the capacity improvements. The costs of projects that do not add capacity are not included in the impact fee

calculations. Furthermore, because the impact fee formula calculates a “cost per dwelling unit”, an identical fee is generated regardless of whether the total new capacity project costs are used in the calculation or whether the District only uses the percentage of the total new capacity project costs allocated to the Districts growth-related needs. Furthermore, impact fees will not be used to address existing deficiencies.

The District’s school impact fees are calculated to include the elementary capacity additions identified in this 2022 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
2022

Housing Type	Impact Fee Per Dwelling Unit
Single Family	\$6,495
Multi-Family (1 Bedroom)	\$0
Multi-Family (2+ Bedroom)	\$4,514

**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	.221
Middle	.080
Senior	.085
Total	.387

Student Generation Factors – Multi Family (1 Bdrm)

Elementary	.000
Middle	.000
Senior	.000
Total	.000

Student Generation Factors – Multi Family (2+ Bdrm)

Elementary	.118
Middle	.059
Senior	.059
Total	.235

Projected Student Capacity per Facility

Elementary	600
Middle	-
Senior	-

Net Site Acreage per Facility

Elementary	-
------------	---

New Facility Construction Cost/Average

Elementary - 600 students (average of three capacity projects)	\$80,900,000
---	--------------

Permanent Facility Square Footage

Elementary	529,676
Middle	292,469
Senior	529,161
Total	1,351,306

Temporary Facility Square Footage

Elementary	28,800
Middle	0
Senior	7,200
Total	36,000

Total Facility Square Footage

Elementary	558,476
Middle	292,469
Senior	536,361
Total	1,387,306

Average Site Cost/Acre

Elementary	\$0
------------	-----

Temporary Facility Capacity

Capacity
Cost

State Match Credit

Current State Match Percentage	56.04%
--------------------------------	--------

Construction Cost Allocation

July 2022 Release	246.83
-------------------	--------

District Average Assessed Value

Single Family Residence	\$635,321
-------------------------	-----------

District Average Assessed Value

Multi Family (1 Bedroom)	\$169,461
--------------------------	-----------

District Average Assessed Value

Multi Family (2+ Bedroom)	\$239,226
---------------------------	-----------

SPI Square Footage per Student

Elementary	90
Middle	117
Senior	130

District Debt Service Tax Rate

Current/\$1,000	\$2.383
-----------------	---------

General Obligation Bond Interest Rate

Bond Buyer Index (2/22 avg)	2.45%
-----------------------------	-------

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

EXHIBIT A-11

SNOHOMISH COUNTY COUNCIL

EXHIBIT # 3.1.002 A-11

FILE ORD 22-057

Sultan School District # 311

Capital Facilities Plan

2022-2027

BOARD APPROVED

JUN 28 2022

Adopted: **SULTAN SCHOOL DISTRICT**

Sultan School District No. 311

Capital Facilities Plan

2022-2027

For Inclusion in the
Snohomish County Comprehensive Plan

BOARD OF DIRECTORS

Cindy Buoy, Vice-Chair

Ed Hussman

Gigi Gouldner

Byron Kindle

Russ Sumpter, Chair

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 (2022-2027).

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 (K-5, 6-8, 9-12).
2. An inventory of existing capital facilities owned by the District showing the locations and capacities of the facilities.
3. A forecast of future needs for capital facilities and school sites.
4. The proposed capacities of expanded or new capital facilities.
5. A six-year plan for financing capital facilities within projected funding capacities, which clearly identifies sources of public money for such purposes. The financing plan separates projects and portions of projects that add capacity from those which do not, since the latter are generally not appropriate for impact fee funding.
6. A calculation of impact fees to be assessed and support data substantiating said fees (if applicable).

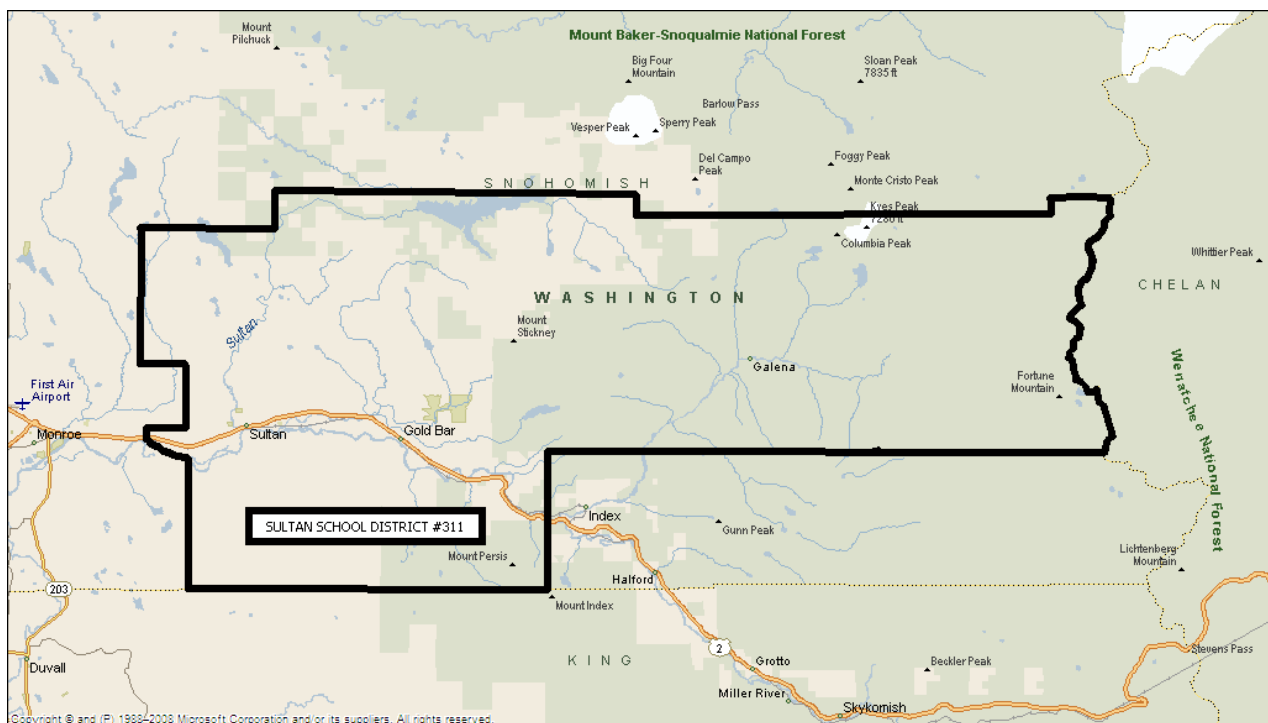
In developing this CFP, the District followed the following guidelines set forth in Appendix F of the Snohomish County General Policy Plan:

- ❖ Information was obtained from recognized sources, such as the WA State Office of Superintendent of Public Instruction (OSPI), U.S. Census, or other governmental report. School districts may generate their own data if it is derived through statistically reliable methodologies. Information is to be consistent with the Office of Financial Management (“OFM”) population forecasts and those of Snohomish County.
- ❖ The CFP complies with Chapter 36.70A RCW (the Growth Management Act) and, where impact fees are to be assessed, Chapter 82.02 RCW.
- ❖ The calculation methodology for impact fees meets the conditions and tests of Chapter 82.02 RCW. Districts which propose the use of impact fees should identify in future plan updates alternative funding sources in the event that impact fees are not available due to action by the state, county or the cities within their district boundaries.
- ❖ The calculation methodology for impact fees, if proposed by the District, also complies with the criteria and the formulas established by the County and the respective City/Cities.

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

Overview of the Sultan School District

The Sultan School District has two elementary schools (grades K-5), one middle school (grades 6-8), one high school (grades 9-12) and an alternative high school program. The District serves a student population of approximately 1,955 (October 1 headcount, 1,925 adjusted FTE enrollment) in all programs from kindergarten through twelfth grade, includes the cities of Sultan and Gold Bar as well as unincorporated rural areas of Snohomish County, and had an estimated population in 2020 of 14,930 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.

OEM 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 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 regularly assesses the condition of its portables for continued educational program use.

Minimum Level of Service (MLOS)

The District will evaluate student housing levels based on the District as a whole system and not on a school by school or site by site basis. This may result in portable classrooms being used as interim housing, attendance boundary changes or other program changes to balance student housing across the system as a whole. A boundary change or a significant programmatic change would be made by the Board of Directors following appropriate public review and comment.

The District's minimum level of service is as follows: on average, K-5 classrooms have no more than 28 students per classroom, 6-8 classrooms have no more than 30 students per classroom, and 9-12 classrooms have no more than 32 students per classroom. The District has set minimum educational service standards based on several criteria. Exceeding these minimum standards will trigger significant changes in program delivery. Minimum standards have not been met if, on average using current FTE figures: K-5 classrooms have more than 28 students per classroom, 6-8 classrooms have more than 30 students per classroom, or 9-12 classrooms more than 32 students per classroom. For purposes of this determination, the term "classroom" does not include special education classrooms or special program classrooms (i.e. computer labs, art rooms, 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 2019-2020 and 2020-2021, the District’s compliance with the minimum educational service standards was as follows:

Table 1 Minimum Level of Service

2019-20 School Year						
LOS Standard	MINIMUM LOS# Elementary	REPORTED LOS Elementary	MINIMUM LOS Middle	REPORTED LOS Middle	MINIMUM LOS High	REPORTED LOS High
	28	20.3	30	30.75	32	31.68

* 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).

2020-21 School Year						
LOS Standard	MINIMUM LOS# Elementary	REPORTED LOS Elementary	MINIMUM LOS Middle	REPORTED LOS Middle	MINIMUM LOS High	REPORTED LOS High
	28	18.61	30	30.13	32	30.32

* The District determines the reported service level by adding the reported average of FTE students at each grade level and dividing that number by the number of general education teaching stations (including portables).

Section 4: Capital Facilities Inventory

CAPITAL FACILITIES

Under the GMA, public entities are required to inventory capital facilities used to serve existing development. The purpose of the facilities inventory is to establish a baseline for determining what facilities will be required to accommodate future demand (student enrollment) at acceptable or established levels of service. This section provides an inventory of capital facilities owned and operated by the Sultan School District including schools, portables, unimproved land and support facilities. Leased facilities are also identified. School facility capacity was inventoried based on the space required to accommodate the District's adopted educational program standards (see Section 3).

Permanent Classrooms

The District operates two elementary schools, one middle school, one high school, and an alternative high school for grades 9-12. Currently the elementary schools serve grades PreK-5, the middle school serves grades 6-8 and the high school serves grades 9-12. School capacity was determined based on the number of classrooms used as general education teaching stations at each school and the District's adopted standard of service. It is this capacity calculation that is used to establish the District's baseline capacity and to determine future capacity needs based on projected student enrollment. The school permanent capacity inventory is summarized in Table 2. Teaching stations that are not available for regular classroom capacity are used as conference room space, computer STEM labs, special education programs, occupational therapy rooms, behavior modification rooms, and special needs pre-school classrooms.

Portable Classrooms

Portable classrooms are used as interim classroom space to house students until funding can be secured to construct permanent classrooms. The Sultan School District currently owns 42 portable classrooms throughout the District to provide additional interim classroom capacity in addition to housing programs to address diverse students (see Table 3). Of the 42 portables listed in inventory, 21 are used as general education classrooms. The other 21 are used for programmatic offerings such as the alternative high school program, computer labs, STEM labs, Title I, Occupational Therapy, Special Education, preschool, and PTA.

Table 2 Permanent Classroom Capacity Inventory

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	25	15	375
TOTAL 6-8	10.41	66,912 sf	25	15	375

High School	Site Size (Acres)	Bldg Area (Square Feet)	Total Teaching Stations	Teaching Stations General Education	Student Classroom Capacity
Sultan High School 13715 310 th Ave SE, Sultan	33.75	71,876 sf	21	10	275
TOTAL 9-12	33.75	71,876 sf	21	10	275

GRAND TOTAL		225,172 sf	86	58	1,228
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Table 3 Portable Classroom* Capacity Inventory

Elementary School	Bldg Area (Square Feet)	Total Teaching Stations	Teaching Stations General Education	Student Classroom Capacity
Sultan Elementary	10,776 sf	12	5	117
Gold Bar Elementary	8,960 sf	10	6	150
TOTAL	19,736 sf	22	11	267

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	39,484 sf	42	21	517
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*District portable classrooms included in Table 3 have adequate useful remaining life and are evaluated regularly for such purpose.

**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	63,437 sf	36	25	506
Gold Bar Elementary	42,683 sf	26	19	371
TOTAL K-5	106,120 sf	62	44	877

Middle School	Permanent/ Temporary (Square Feet)	Total Teaching Stations	Teaching Stations General Education	Total Maximum Student Capacity
Sultan Middle School	71,392 sf	30	16	400
TOTAL 6-8	71,392 sf	30	16	400

High School	Permanent/ Temporary (Square Feet)	Total Teaching Stations	Teaching Stations General Education	Total Maximum Student Capacity
Sultan High School	85,352 sf	34	19	500
TOTAL 9-12	85,352 sf	34	19	500

Alternative Program	Permanent/ Temporary (Square Feet)	Total Teaching Stations	Teaching Stations General Education	Student Classroom Capacity
Columbia Virtual Academy	1,792	2	0	0
TOTAL	1,792	2	0	0

GRAND TOTAL	264,656 sf	128	79	1,777
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Support Facilities

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

Table 5 Support Facility Inventory

Facility	Building Area (Square Feet)
Administration 514 4th St, Sultan, WA 98294	3,149
Bus Barn 303 High Ave, Sultan WA 98294	7,200
TOTAL	10,349

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, and the other, a 9.787 acre site, is at the south eastern edge of the City and planned for a future transportation co-op. The District is currently pursuing purchase of a 50 acre site (for a future elementary school and high school).

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 2022-2027

Enrollment projections are the most accurate for the initial years of the forecast period. Moving further into the future, more assumptions about economic conditions and demographic trends in the area affect the projection. Any plans for new facilities can be delayed if enrollment projections and the economy indicate a downturn. It is much more difficult, however, to initiate new projects or speed projects up in the event enrollment growth exceeds the projections. The District plans to monitor closely actual enrollment and, if necessary, make appropriate adjustments in future Plan updates. For purposes of this update, the District reviewed three methods of projections:

1. ***The Office of Financial Management (OFM)*** “ratio method” is based upon Snohomish County population estimates for people residing within the Sultan School District Service Area (both within the corporate City limits of Sultan and Gold Bar as well as unincorporated parts of Snohomish County) compared to current Actual student enrollment. Between 2014 and 2019, the District’s enrollment averaged approximately 13.81% of the total population in the Sultan School District service area. In 2020, during the pandemic, the average fell to 12.57%. Using the pre-pandemic average, and 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 2,424 students is projected for 2027. This is an increase of 469 students from actual 2021 enrollment, or an 23.99% increase. Using the OFM methodology, student enrollment is anticipated at 2,635 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 2027 to 2,032 students, an increase of 3.94% over 2021 headcount enrollment. See Appendix A – page 1.
3. ***The District*** has developed its own methodology for forecasting future enrollments. This methodology, a modified cohort survival method, considers historic enrollment trends in the District and known data regarding local housing circumstances. The District’s enrollment projections start with actual 2021 FTE enrollment and use a monthly average to produce an annual enrollment number. The District uses this average to project forward in forecasting for budget purposes and to ensure adequate staffing levels to meet enrollment projections. The District’s methodology uses a full-time equivalent analysis instead of headcount to more accurately reflect the actual

number of students in school buildings at a given time. Based upon the District's methodology, the District's enrollment will increase by a total of 482 students by 2027, an increase of 25.0% from 2021 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	2021^	2022	2023	2024	2025	2026	2027	2021-2027	2021-2027
OFM	1,955	2,033	2,111	2,189	2,267	2,345	2,424	469	24.0%
OSPI	1,955	1,974	1,984	2,005	1,996	2,013	2,032	77	3.94%
District	1,925	2,045	2,145	2,220	2,280	2,354	2,407	482	25.0%
Population Projections**	14,930*						17,549	2,619	17.54%
^October 1, 2021 actual HC enrolment, with District figures adjusted for FTE.									
*2020 Census									
**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 2027 are highly speculative. Using OFM/County data as a base, the District projects a 2044 student FTE population of 2,635. 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 2021 to 2044

Grade Span	Actual Enrollment – October 2021	Projected Enrollment 2044*
Elementary (K-5)	910	1,212
Middle School (6-8)	443	597
High School (9-12)	602	811
TOTAL (K-12)	1,955	2,635

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 2021 enrollment and projected 2027 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 2021 Enrollment

Grade Span	Permanent Capacity	Enrollment	Available Capacity*	Unhoused Students
Elementary Level (K-5)	610	943	0	333
Middle Level (6-8)	375	443	0	68
High School Level (9-12)	275	539	0	264
TOTALS	1,260	1,925	0	665

*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 2027, the end of the six-year forecast period:

Table 9 Unhoused Students – Based on Projected October 2027 Enrollment

Grade Span	Permanent Capacity	Enrollment (FTE)	Available Capacity*	Unhoused Students	%age of Unhoused Students above 2021
Elementary Level (K-5)	610	1,179	0	569	41.48%
Middle Level (6-8)	375	554	0	179	62.01%
High School Level (9-12)	275	674	0	399	33.83%
TOTALS	1,260	2,407	0	1,147	42.02%

*Permanent capacity only

Table 9 demonstrates that projected growth through 2027 will impact the District’s facilities at all three grade levels.

Importantly, Table 9 does not include portable classroom additions or adjustments that could be made to meet capacity needs. For example, the portable classrooms currently located at the elementary school level could be used to serve middle school capacity needs.

Projected permanent capacity needs are depicted in Table 10. They are derived by applying the District’s projected number of students to the projected capacity. Planned improvements by the District through 2027 are included in Table 10 and more fully described in Table 11.

Table 10 Projected Student Capacity – 2021 through 2027**Elementary School -- Surplus/Deficiency**

	2021*	2022	2023	2024	2025	2026	2027
Existing Capacity	610	610	610	610	610	610	810
Added Permanent Capacity	0	0	0	0	0	200**	700+
Enrollment	943	1,002	1,051	1,088	1,117	1,154	1,179
Permanent Facilities Surplus/(Deficiency)^	(333)	(392)	(441)	(478)	(507)	(344)	331

* Actual Oct. 2021 FTE enrollment

** Classroom addition at Sultan Elementary School (100) and Gold Bar Elementary (100)

+ New Elementary School (700)

^Does not include capacity solutions with current and planned portable classrooms

Middle School Level -- Surplus/Deficiency

	2021*	2022	2023	2024	2025	2026	2027
Existing Capacity	375	375	375	375	375	375	0
Added Permanent Capacity	0	0	0	0	0	0	704**
Enrollment	443	470	493	511	524	541	554
Permanent Facilities Surplus/(Deficiency)^	(68)	(95)	(118)	(136)	(149)	(166)	150

* Actual Oct. 2021 FTE enrollment

** Current SHS converted to new Sultan Middle School with added capacity (net gain of +224 seats).

^ Does not include capacity solutions with in current portable classrooms

High School Level -- Surplus/Deficiency

	2021*	2022	2023	2024	2025	2026	2027
Existing Capacity	275°	275	275	275	275	0	800
Added Permanent Capacity	0	0	0	0		800**	0
Enrollment	539	573	601	622	628	659	674
Permanent Facilities Surplus/(Deficiency)^	(264)	(298)	(326)	(347)	(353)	141	126

* Actual Oct. 2021 FTE enrollment

° Regular capacity at existing high school down from previous years due to increased needs in brick and mortar building for special capacity purposes; regular capacity needs relying more heavily on portables.

** New High School (800 for a net gain of +525 seats) (existing SHS converted to new and expanded SMS)

^ Does not include capacity solutions with current and planned portable classrooms

Planned Improvements

Table 10 indicates that the District will need additional capacity at all grade levels to serve projected student enrollment. The District is engaging in early bond planning to reflect the projects included in this Capital Facilities Plan. A future resolution by the Board of Directors, as well as voter approval of a bond, will be required to fund the planned projects. Future updates to this CFP will include updated information regarding any adopted bond resolution.

Projects Adding Permanent Capacity (subject to funding):

- a 100 seat expansion at Sultan Elementary School;
- a 100 seat expansion at Gold Bar Elementary School;
- a new 700 student elementary school;
- a 90 seat expansion at Sultan Middle School to convert that school to an alternative program for District learning;
- a 256 seat expansion at Sultan High School to convert that school to the new Sultan Middle School;
- a new 800 student high school (new Sultan High School).

Non-Capacity Adding Projects (subject to funding):

- Modernization and improvements at Sultan Elementary and Gold Bar Elementary.

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

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

Funding for planned improvements is typically secured from a number of sources including voter approved bonds, State School Construction Assistance funds, and impact fees. The potential funding sources are discussed below.

Interim Classroom Facilities (Portables)

During the six years of this planning period, the District may purchase or lease portable classrooms and/or relocate portables if necessary to address growth needs. It remains a District goal to house all students in permanent facilities.

Section 7: Financial Plan

Funding of school facilities is typically secured from a number of sources including voter approved bonds, capital levies, State School Construction Assistance funds, and School Impact Fees. Each of these sources is discussed in greater detail below.

General Obligation Bonds

Bonds are typically used to fund construction of new schools and other capital improvement projects. A 60% voter approval is required to pass a bond. Bonds are then retired through collection of property taxes. General Obligation Bonds or Special Levies would be the primary source of funding for any future capital improvement projects.

State School Construction Assistance Program

State School Construction Assistance Program funds come from the Common School Construction Fund. The State deposits revenue from the sale of renewable resources from State school lands set aside by the Enabling Act of 1889 into the Common School Account. If these sources are insufficient to meet needs, the Legislature can appropriate General Obligation Bond funds or the Superintendent of Public Instruction can prioritize projects for funding. School districts may qualify for State School Construction Assistance Program funds for specific capital projects based on a prioritization system. The District anticipates that it will receive SCAP funds for the Sultan High school and Gold Bar Elementary School projects that are included in this CFP. The District is eligible for State School Construction Assistance funds for certain projects at the 61.85% funding percentage level.

School Impact Fees

Impact fees have been adopted by a number of jurisdictions as a means of supplementing traditional funding sources for construction of public facilities needed to accommodate new development. School impact fees are generally collected by the permitting agency at the time building permits are issued. Following a decline in enrollment in 2010, the District did not request school impact fees for several years. With recent and projected continued enrollment increases, as well as capacity planning to address these enrollment needs, the District began requesting school impact fees in 2016 and continues to do so in this Capital Facilities Plan.

Six-Year Financial Plan

The Six-Year Financial Plan shown in Table 11 is a summary of the expected budget that supports the projects in this Capital Facilities Plan. The financing components include possible funding from capital bonds and levies, school impact fees, and State Construction Assistance Funds (dependent upon qualifying, level of funding and availability of funds). Projects and portions of projects which remedy existing deficiencies are not appropriate for impact fee funding. Thus, impact fees will not be used to finance projects or portions of projects which do not add capacity or which remedy existing deficiencies.

The District expects that, as project and bond planning proceeds, the estimated project costs in Table 11 are likely to increase. Thus, the project cost estimates in this CFP should be viewed conservatively. Future updates to this CFP will include updated cost estimates.

Table 11 Finance Plan 2022-2027

Improvements Adding Permanent Capacity (Costs in Millions)

Project	2022	2023	2024	2025	2026	2027	Total Cost	Bonds/ Levy	State Funds	Impact Fees
Elementary School										
Sultan Elementary Addition					\$10.897		\$10.897	X		X
Gold Bar Elementary Addition					\$10.897		\$10.897	X	X	X
New Elementary (estimated future costs*)					\$76.284		\$76.284	X	X	X
Middle School										
New Sultan Middle (conversion of existing SHS with added capacity)						\$31.633	\$31.633	X	X	X
High School										
New High School					\$98.853		\$98.853	X	X	X
K-12										
Portables							TBD			X
Alternative School (conversion of existing SMS)					\$10.928		\$10.928	X	X	
Site Acquisition (new ES and HS)	\$5.00						\$5.00	X		X

Improvements Not Adding Permanent Capacity (Costs in Millions)

Project	2022	2023	2024	2025	2026	2027	Total Cost	Bonds/ Levy	State Funds	Impact Fees
Elementary School										
Sultan Elementary Modernization					\$3.601		\$3.601	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;

Data in the proposed impact fee schedule must reflect expected student generation rates from the following residential unit types:

- 1. Single-family
- 2. Multi-family/ 2 or more bedrooms
- 3. Multi-family/studio or 1-bedroom;

In November 1997, Snohomish County substantially modified Title 26C to convert it into an impact fee program meeting new requirements of the GMA and changes to RCW 82.02, the State law authorizing impact fees. On February 1, 2003, Snohomish County adopted a revision of Title 26C, thus replacing it with Chapter 30.66C, as defined by the Uniform Development Code. The cities of Sultan and Gold Bar have adopted school impact fee ordinances consistent with the Snohomish County school impact fee ordinance.

Methodology and Variables Used to Calculate School Impact Fees

Impact fees are calculated utilizing the formula in the Snohomish County school impact fee ordinance. The resulting figures are based on the District's cost per dwelling unit to purchase land for school sites, make site improvements, construct schools, and purchase/install relocatable facilities that add interim capacity needed to serve new development. A student factor (or student generation rate) is used to identify the average cost per dwelling unit by measuring the average number of students generated by each housing type (single-family dwellings and multi-family dwellings of one bedroom and two bedrooms or more). A description of the student methodology is contained in Appendix B. As required under the GMA, credits are applied in the formula to account for State School Construction Assistance funds to be reimbursed to the District and projected future property taxes to be paid by the dwelling unit. The costs of projects that do not add capacity are not included in the impact fee calculations. Furthermore, because the impact fee formula calculates a "cost per dwelling unit," an identical fee is generated regardless of whether the total new capacity project costs are used in the calculation or whether the District uses only the percentage of the total new capacity project costs allocated to the Districts growth-related needs, as demonstrated in Table 9. For purposes of this Plan, the District has chosen to use the full project costs in the fee formula. Furthermore, impact fees will not be used to address existing deficiencies. See Table 11 for a complete identification of funding sources.

The following projects are included in the impact fee calculation:

- 100 student capacity additions at both Sultan and Gold Bar Elementary Schools;
- A new 700 student elementary school;
- 256 student capacity addition at new Sultan Middle School; and
- A new 800 student Sultan High School.

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)	\$14,842
<i>Multi-Family (2+ bdrms)</i>	\$9,576
<i>Multi-Family (studio or 1 bdrm)</i>	\$0

**Table 12 reflects a 50% adjustment to the calculated fee as required by local ordinances.*

APPENDIX A



ICOS

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

Snohomish/Sultan(31311)

Grade	--- ACTUAL ENROLLMENTS ON OCTOBER 1st ---						AVERAGE % SURVIVAL	--- PROJECTED ENROLLMENTS ---					
	2016	2017	2018	2019	2020	2021		2022	2023	2024	2025	2026	2027
Kindergarten	139	147	137	158	132	156		151	153	154	156	158	160
Grade 1	130	161	158	147	143	143	105.88%	165	160	162	163	165	167
Grade 2	154	129	147	154	145	159	99.56%	142	164	159	161	162	164
Grade 3	154	144	127	158	142	147	98.59%	157	140	162	157	159	160
Grade 4	161	159	151	125	133	156	100.10%	147	157	140	162	157	159
Grade 5	140	169	162	152	124	149	103.74%	162	152	163	145	168	163
Grade 6	164	142	173	170	149	128	101.99%	152	165	155	166	148	171
K-6 Sub-Total	1,042	1,051	1,055	1,064	968	1,038		1,076	1,091	1,095	1,110	1,117	1,144
Grade 7	144	169	141	178	153	156	99.98%	128	152	165	155	166	148
Grade 8	154	146	154	144	180	159	99.93%	156	128	152	165	155	166
7-8 Sub-Total	298	315	295	322	333	315		284	280	317	320	321	314
Grade 9	146	146	132	164	150	180	99.17%	158	155	127	151	164	154
Grade 10	150	151	148	142	150	146	100.22%	180	158	155	127	151	164
Grade 11	155	120	142	148	133	143	92.60%	135	167	146	144	118	140
Grade 12	151	146	123	141	143	133	98.52%	141	133	165	144	142	116
9-12 Sub-Total	602	563	545	595	576	602		614	613	593	566	575	574
DISTRICT K-12 TOTAL	1,942	1,929	1,895	1,981	1,877	1,955		1,974	1,984	2,005	1,996	2,013	2,032

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

**Modified Cohort Survival Projections
(Sultan School District)**

ENROLLMENT FORECAST

S.Y.	21/22	22/23	23/24	24/25	25/26	26/27	27/28
Tot Enroll.	1,925	2,045	2,145	2,220	2,280	2,354	2,407
Chg vs Prior Year	120						
		100					
			75				
				60			
					74		
						53	

		21/22	22/23	23/24	24/25	25/26	26/27	26/28
K-5	49%	943.25	1,002.05	1,051.05	1,087.80	1,117.20	1,153.46	1,179.43
6-8	23%	442.75	470.35	493.35	510.60	524.40	541.42	553.61
9-12	28%	539.00	572.60	600.60	621.60	638.40	659.12	673.96
TOTAL		1,925.00	2,045.00	2,145.00	2,220.00	2,280.00	2,354.00	2,407.00

APPENDIX B



MEMORANDUM

Phone: (206) 324-8760
2200 Sixth Avenue, Suite 1000
Seattle, WA 98121
www.berkconsulting.com

DATE: January 19, 2022

TO: Dan Chaplik, Superintendent, Sultan School District

FROM: Kevin Gifford, Senior Associate, BERK Consulting

RE: Sultan School District Findings for Student Generation Rates

Introduction

This memorandum contains findings for the Sultan School District's 2019 and 2022 student generation rates (SGR). Student generation rates provide an estimate of the number of students associated with a given level of residential growth. BERK was contracted to provide analysis of student enrollment and district housing data to determine SGR's for two enrollment dates: January 2020 (2019-2020 school year) and October 2021 (2021-2022 school year).

Analysis Methodology

To calculate the SGR's, BERK used student address data provided by the District and current land use and property records available from the Snohomish County Assessor. BERK geocoded student addresses using GIS software and matched address points to County property records; each matched address was classified as single-family, duplex, triplex, fourplex, or multifamily (5+ units), based on County property records.

In general, SGR's are calculated by dividing the number of students enrolled and living within the District by the number of housing units located in the District. Typically, only housing units constructed recently (within the last 5-10 years) are included in order to more closely reflect recent development trends in the area. For purposes of this analysis, SGR by grade level was calculated based on:

1. Housing units inside the District boundaries and constructed within the last 5 years (2015-2019 for the 2019-2020 school year and 2017-2021 for the 2021-2022 school year); and
2. The number of enrolled students currently living at those addresses.

Housing units constructed and associated student population are presented in Exhibit 1.

Exhibit 1. District Housing Units and Student Population

Housing Units and Student Population	2015-2019	2017-2021
Housing Units Constructed		
Single Family	365	508
Duplex	3	5
Triplex	0	0
Fourplex	0	0
Multifamily (5+)	0	0
Total	368	513
Students Living in Units Constructed		
Single Family	102	198
Duplex	3	3
Triplex	0	0
Fourplex	0	0
Multifamily (5+)	0	0
Total	105	201

Sources: Sultan School District, 2022; Snohomish County Assessor, 2021.

Findings for Student Generation Rates

Exhibit 2 and Exhibit 3 show the results of the SGR analysis by grade band and grade level for both the 2019-2020 and 2021-2022 school years. Empty cells indicate grade levels where no students enrolled for the associated school year lived in housing units constructed within the previous 5-year period. As shown in Exhibit 1, new housing construction in the district during the analysis periods has consisted primarily of single-family units. Very few duplexes have been built recently, and no construction of triplex, fourplex, or multifamily units was recorded within the district during either analysis period. Student generation rates therefore cannot be calculated for those housing types, and the following exhibits present calculated rates only for single-family and duplex housing units.

Due to the small size of the district's duplex housing stock, calculated rates for this housing type may be subject to substantial fluctuations from year to year. Expanding the date range beyond the previous five years would capture a larger number of students and housing units, thereby achieving greater coverage for duplex/triplex/multifamily units. However, as more older housing units are included, the results are less representative of current development trends.

Exhibit 2. Sultan School District Student Generation Rates by Grade Band

Sultan School District Student Generation Rates by Grade Level				
	2019-2020 School Year		2021-2022 School Year	
Grade	Single Family	Duplex	Single Family	Duplex
Pre-K	0.005	-	0.006	-
K-5	0.134	0.333	0.220	0.200
6-8	0.066	0.333	0.075	0.200
9-12	0.074	0.333	0.089	0.200
Total (All Grades)	0.279	1.000	0.390	0.600

Exhibit 3. Sultan School District Student Generation Rates by Grade Level

Sultan School District Student Generation Rates by Grade Level				
	2019-2020 School Year		2021-2022 School Year	
Grade	Single Family	Duplex	Single Family	Duplex
Pre-K	0.005	-	0.006	-
Kindergarten	0.005	-	0.043	-
Grade 1	0.008	-	0.028	-
Grade 2	0.027	-	0.037	-
Grade 3	0.036	0.333	0.041	0.200
Grade 4	0.022	-	0.033	-
Grade 5	0.036	-	0.037	-
Grade 6	0.019	-	0.028	-
Grade 7	0.027	-	0.030	-
Grade 8	0.019	0.333	0.018	0.200
Grade 9	0.027	-	0.039	-
Grade 10	0.008	0.333	0.012	0.200
Grade 11	0.030	-	0.026	-
Grade 12	0.008	-	0.012	-
Total (All Grades)	0.279	1.000	0.390	0.600

Note: Empty cells (-) reflect grade levels that did not have any enrolled students living in housing units constructed during the study period for that school year.

Sources: Sultan School District, 2022; Snohomish County Assessor, 2021.

Multi-Family 2+ BR Rates: As noted above, the District does not have a reliable data set for purposes of calculating student generation rates for Multi-Family 2+ bedroom units. Consistent with the methodology used in the 2016, 2017, 2018, and 2020 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 2020 capital facilities plans (the last County-adopted set of plans) of the other school districts in Snohomish County. These averages reflect recent development trends in Snohomish County which will likely influence any multi-family construction that occurs in the District in the near term. 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 2020 calculated average* as an estimate of student generation from new Multi-Family 2+ bedroom units within the Sultan School District.

The resulting average student generation rates are as follows:

Multi-Family 2+ BR Rates	K-5	6-8	9-12
	0.108	0.058	0.078

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 (Monroe, Mukilteo, Lake Stevens).

APPENDIX C

SCHOOL IMPACT FEE CALCULATIONS									
DISTRICT	Sultan School District								
YEAR	2022								
School Site Acquisition Cost:									
((AcresxCost per Acre)/Facility Capacity)xStudent Generation Factor									
	Facility	Cost/	Facility	Student	Student	Student			
	Acreage	Acre	Capacity	SFR	MFR (1)	MFR (2+)	Cost/	Cost/	Cost/
							SFR	MFR (1)	MFR (2+)
Elementary	10.00	\$ -	900	0.220	0.000	0.108	\$0	\$0	\$0
Middle	20.00	\$ -	256	0.075	0.000	0.058	\$0	\$0	\$0
High	40.00	\$ -	900	0.089	0.000	0.078	\$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			
	Total Sq.Ft.	Cost	Capacity	Factor	Factor	Factor	Cost/	Cost/	Cost/
				SFR	MFR (1)	MFR (2+)	SFR	MFR (1)	MFR (2+)
Elementary	84.80%	\$ 98,078,000	900	0.220	0.000	0.108	\$20,330	\$0	\$9,980
Middle	84.80%	\$ 31,633,000	256	0.075	0.000	0.058	\$7,859	\$0	\$6,077
High	84.80%	\$ 98,853,000	800	0.089	0.000	0.078	\$9,326	\$0	\$8,173
						TOTAL	\$37,515	\$0	\$24,231
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	Factor	Factor	Factor	SFR	MFR (1)	MFR (2+)
				SFR	MFR (1)	MFR (2+)			
Elementary	15.20%	\$ -	25	0.220	0.000	0.108	\$0	\$0	\$0
Middle	15.20%	\$ -	30	0.075	0.000	0.058	\$0	\$0	\$0
High	15.20%	\$ -	32	0.089	0.000	0.078	\$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			
		Footage	Asst %	Factor	Factor	Factor	Cost/	Cost/	Cost/
				SFR	MFR (1)	MFR (2+)	SFR	MFR (1)	MFR (2+)
Elementary	\$ 246.83	90	61.85%	0.220	0.000	0.108	\$3,023	\$0	\$1,484
Middle	\$ 246.83	108	61.85%	0.075	0.000	0.058	\$1,237	\$0	\$956
High	\$ 246.83	130	61.85%	0.089	0.000	0.078	\$1,766	\$0	\$1,548
						TOTAL	\$6,026	\$0	\$3,988
Tax Payment Credit:							SFR	MFR (1)	MFR (2+)
Average Assessed Value							\$395,711	\$169,461	\$239,226
Capital Bond Interest Rate							2.45%	2.45%	2.45%
Net Present Value of Average Dwelling							\$3,472,253	\$1,486,973	\$2,099,141
Years Amortized							10	10	10
Property Tax Levy Rate							\$0.52	\$0.52	\$0.52
Present Value of Revenue Stream							\$1,806	\$773	\$1,092
Fee Summary:				Single	Multi-	Multi-			
				Family	Family (1)	Family (2+)			
Site Acquisition Costs				\$0	\$0	\$0			
Permanent Facility Cost				\$37,515	\$0	\$24,231			
Temporary Facility Cost				\$0	\$0	\$0			
State SCFA Credit				(\$6,026)	\$0	(\$3,988)			
Tax Payment Credit				(\$1,806)	(\$773)	(\$1,092)			
FEE (AS CALCULATED)				\$29,684	(\$773)	\$19,151			
Fee (AS DISCOUNTED)				\$14,842	\$0	\$9,576			