SULTAN CITY COUNCIL
AGENDA ITEM COVER SHEET

ITEM NO: Public Hearing for Adoption of Sultan School District #311 Capital Facilities Plan including revisions to the School Impact Fees

DATE: September 13, 2007

SUBJECT:
Conduct Public Hearing for Adoption of Sultan School District #311 Capital Facilities Plan (CFP) including revision to the School Impact Fees

CONTACT PERSON: Rick Cisar, Director of Community Development

STAFF RECOMMENDATION:
Conduct Public Hearing for the adoption of the Sultan School District Capital Facilities Plan including an increase to the School Impact Fees. Thereafter, close the Hearing and consider adoption of the Sultan School Distict #311 Capital Facilities Plan and increases to the single family (from $1,673 to $2,878 increase of $1,250) and multifamily impact fees (from $1,221 to $1,931 increase of $710) under Action Item Number A-7.

ISSUE:
The issue before the City Council is to conduct a Public Hearing to consider the adoption of the Sultan School District #311 Capital Facilities Plan and increase in the Single Family and Mulifamily Impact Fees.

SUMMARY:
The Sultan School District has requested the City to increase the current School Impact Fee based on the recommendations of the District's 2006-2011 Capital Facilities Plan.

Procedurally, the Planning Board conducts a Public Hearing on the District's Capital Facility Plan and School Impact Fee increase and thereafter forwards the Board's recommendation to the City Council.

The Planning Board conducted a Public Hearing on the District's Capital Facility Plan and Impact Fee increase on August 7, 2007 and recommended adoption of the Plan and Impact Fee.

The City Council, in turn will conduct an additional Public Hearing on the District's Capital Facilty Plan and School Impact Fee increase and adopt by Ordinance the Capital Facility Plan and revised School Impact Fee.

The adoption of the School District Capital Facility Plan and incorportation into the Comprehensive Plan was docketed in 2005 by the City in anticipation of the update.

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DISCUSSION:
The School District's Capital Facilities Plan on page C-1 of Appendix C identifies in the last column the Final Impact Fee for both single family ($2,878) and multifamily ($1,931) units. By comparison the current single impact fee is ($1,673) and the multifamily impact fee is ($1,221). These fees were adopted by the City on June 4, 2003. The change represents and increase of $1,250 for single family units and $710 for multiple family units.

The School Impact Fee is paid to the City at the time of issuance of a building permit. On a quartley basis, the City transfers the impacts fees collected including interest to the School District. (Attachment 2) This process has worked well for both the District and City and improved our ability to issues building permits in a timely manner.

A FULL DISCUSSION OF THE Ditrict's methodology for calculating the revised impact fees begins on page 23 of the District's 2006-2011 Capital Facilities Plan (Attachment 1).

School District Impact Fees are calculated following Snohomish County Ordinance 97-095. Under Ordinance 97-095, a credit is granted to new development to account for taxes that will be paid to the School District over the next 10-years.

Other varaibales used to calculate the fees include site size, new student estimates, facilitiy construction costs, tax credits, and average assessed values for new home construction.

The School District's Impact Fee have increased based on the enrollement projections for the ensuing twenty year planning period, the School District anticipates the following facilities to accommodate its needs; two elenmentary schools, conversion of the exisiting high school to a juniior high school, and construction of a new high school. This is one source of funding to help provide for School District's needs.

ATTACHMENTS:

Attachment 1 Sultan School District #311 Capitial Facilities Plan 2006-2011
Attachment 2 Chapter 16.116 School District Impact Fees
Attachment 3 Ordinance Number 959-07

LK

Sultan School District # 311

Capital Facilities Plan

2006 – 2011

Adopted by the Board:
August 28, 2006

ATTACHMENT 1

Sultan School District No. 311
Capital Facilities Plan
2006-2011

For Inclusion in the
Snohomish County Comprehensive Plan

BOARD OF DIRECTORS

Craig Roesler
Patty Fountain
Tracy Cotterill
Russ Sumpter
Charles Van Pelt

SUPERINTENDENT

Allan Robinson

For information on the Sultan School District Facilities Plan contact the Business Office (360) 793-9800

Sultan School District
301 High Avenue
Sultan, Washington 98294-0399

Resolution No. *06.07-03*

A Resolution of the Board of Directors (the "Board") of the Sultan School District No. 311 (the "District") to adopt a Capital Facilities Plan (the "Plan") for school facilities pursuant to requirements of the State Growth Management Act and the Snohomish County General Policy Plan.

Whereas, the District is authorized by 36.70A RCW (The Growth Management Act) and RCW 82.02.050 and the Snohomish County General Policy Plan to adopt a Capital Facilities Plan, and is required to do so if impact fees are assessed;

Whereas, development of the Plan was carried out by the District in accordance with accepted methodologies and requirements of the Growth Management Act and 82.02 RCW; and

Whereas, the impact fee calculations are consistent with methodologies meeting the conditions and tests of 82.02 RCW and SCC 97-095; and

Whereas, the District finds that the methodologies for determining capital facilities requirements accurately assess necessary additional capacity which address only future growth-related needs; and

Whereas, a draft of the Capital Facilities 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 Capital Facilities Plan complies with RCW 36.70A and 82.02 RCW; and

Whereas, environmental review of the Capital Facilities Plan was carried out pursuant to RCW 43.21.C (the State Environmental Policy Act) with a Determination of No Significant Impact having been issued;

Now, Therefore Be It Resolved as follows:

1. The 2006 Capital Facilities Plan for the years 2006-2011 is hereby adopted pursuant to the requirements of 36.70A RCW, 82.02 RCW and the Snohomish County General Policy Plan.

2. The Snohomish County Council is hereby requested to adopt the Plan as an element of its Capital Facilities Plan and its General Policy Plan.

Adopted this 28th of August, 2006, and authenticated by the signatures affixed below:

[signed copy on file with SSD]
President

[signed copy on file with SSD]
Vice President

[signed copy on file with SSD]
Director

[signed copy on file with SSD]
Director

[signed copy on file with SSD]
Director

ATTEST:

BY: [signed copy on file with SSD]
Allan Robinson, Secretary, Board of Directors

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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 a description of facilities needed to accommodate projected student enrollment and a schedule and financing program for capital improvements over the next six years (2006-2011).

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

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

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

- Information was obtained from recognized sources, such as the U.S. Census or the Puget Sound Regional Council. School districts may generate their own data if it is derived through statistically reliable methodologies. Information is to be consistent with the State Office of Financial Management ("OFM") population forecasts and those of Snohomish County. Ordinance 97-095 and 99-107 require that student generation rates be independently calculated by each school district.

- The CFP complies with Chapter 36.70A RCW (the Growth Management Act) and, where impact fees are to be assessed, Chapter 82.02 RCW.

- The calculation methodology for impact fees meets the conditions and tests of Chapter 82.02 RCW. Districts which propose the use of impact fees should identify in future plan updates alternative funding sources in the event that impact fees are not available due to action by the state, county or the cities within their district boundaries.

- The calculation methodology for impact fees also complies with the criteria and the formulas established by the County and the City.

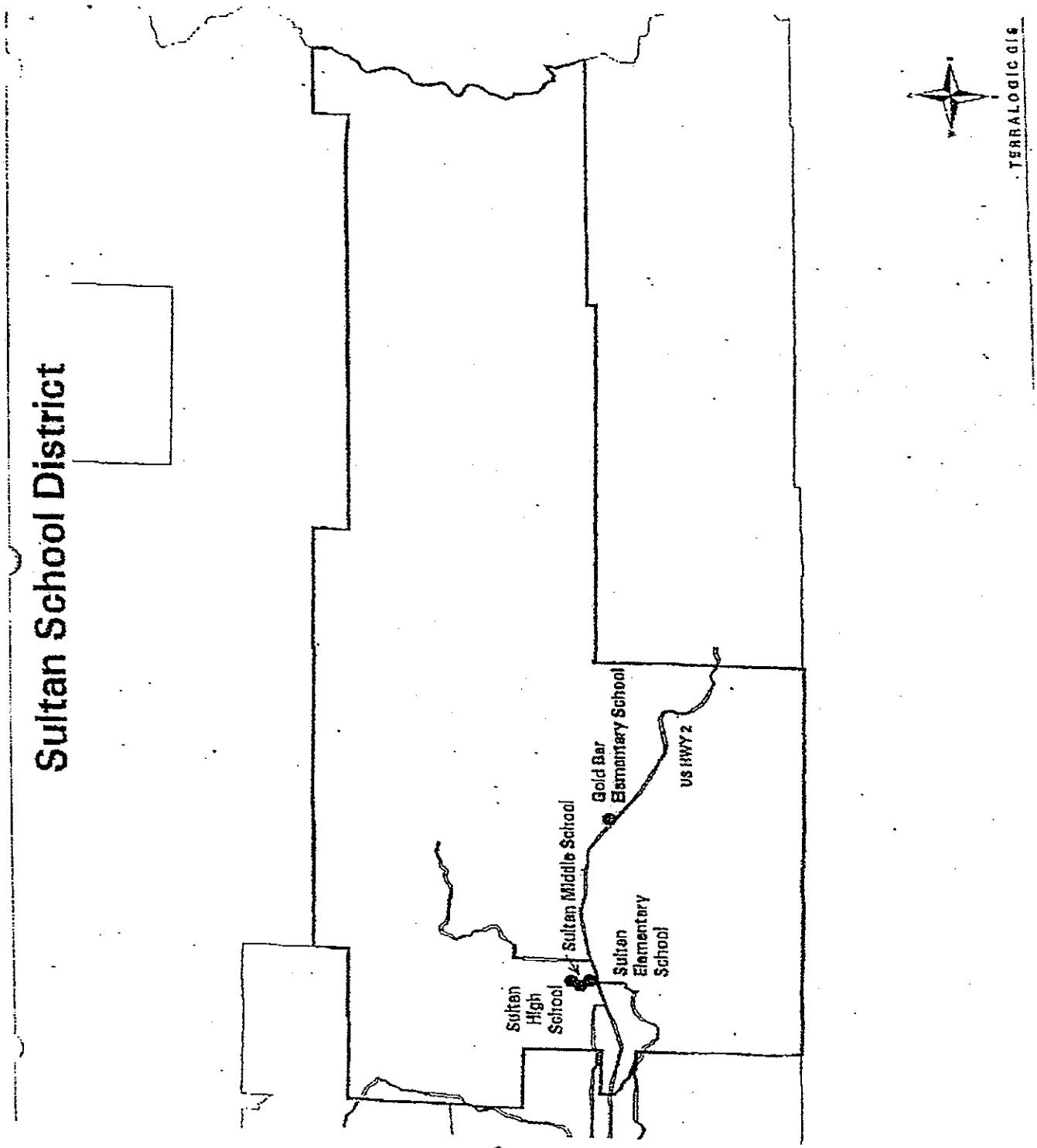
The County Council, on November 17, 1997, adopted Ordinance 97-095 that establishes the specific criteria for CFP adoption and for the assessment of mitigation fees. Section 3 of the Ordinance defines the requirements for the biennial CFP updates. Table 1 of the Ordinance outlines the formulae for determination of impact fees. This CFP has been drafted in accordance with Ordinance 97-095 and 99-107.

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

Overview of the Sultan School District

The Sultan School District serves a population of approximately 2,171 (October 2005 FTE) students in kindergarten through grade 12. The District includes the cities of Sultan and Goldbar, as well as the unincorporated rural area, and has a combined population of about 13,176 people. The District is located 47 miles north of Seattle in the heart of the Puget Sound region of Washington.

The District has two elementary schools (grades K-5), one middle school (grades 6-8) and one high school (grades 9-12).


Sultan School District
Sultan High School
Sultan Middle School
Sultan Elementary School
Gold Bar Elementary School
US HWY 2
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-3-

Section 2: Definitions

Note: Where definitions are contained within Ordinance 97-095 and 99-107, the Ordinance definition is used (*). In some cases, further clarification has been provided:

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

***Average Assessed Value** means the average assessed value by dwelling unit type of all residential units constructed within the district.

Board means the Board of Directors of the Sultan School District No. 311 ("School Board").

***Boeckh Index** means the current construction trade index of construction costs for each school type.

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

***Capital Facilities Plan (CFP)** means the District's facilities plan adopted by its school board consisting of those elements required by Chapter 26C.24 SCC and meeting the requirements of the GMA and Appendix F of the General Policy Plan. The definition refers to this document.

***Council** means the Snohomish County Council.

***County** means Snohomish County.

DCTED means the Washington State Department of Community, Trade and Economic Development.

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

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

***Development Activity** means any residential construction or expansion of a building, structure of use of land or any other change of building, structure or land that creates additional demand and need for school facilities, but excluding building permits for attached or detached accessory apartments, and remodeling or renovation permits which do not result in additional dwelling units. Also excluded from this definition is "Housing for Older Persons" as defined by 46 U.S.C.

§ 3607, when guaranteed by a restrictive covenant, and new single-family detached units constructed on legal lots created prior to May 1, 1991.

***Development Approval** means any written authorization from the County that authorizes the commencement of a development activity.

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

District means Sultan School District No. 311.

***District Property Tax Levy Rate** means the District's current capital property tax rate per thousand dollars of assessed value.

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

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

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

***Facility Design Capacity** means the number of students each school type is designed to accommodate based on the District's standard of service as determined by the District.

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

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

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

***Growth Management Act / GMA** means the Growth Management Act, Chapter 17, Laws of the State of Washington of 1990, 1st Ex. Sess., as now in existence or as hereafter amended.

***Interest Rate** means the current interest rate as stated in the Bond Buyer Twenty Bond General Obligation Bond Index.

***Land Cost Per Acre** means the estimated average land acquisition cost per acre (in current dollars) based on recent site acquisition costs, comparisons of comparable site acquisition costs in other districts, or the average assessed value per acre of properties comparable to school sites located within the District.

***Multi-Family Dwelling Unit** means any residential dwelling unit that is not a single-family unit as defined by this ordinance.

OFM means Washington State Office of Financial Management.

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

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

Portables: means factory-built structures, transportable in one or more sections, that are designed to be used as instructional spaces and are needed to prevent the overbuilding of school facilities, to meet the needs of service areas within the District, or to cover the gap between the time that families move into new residential developments and the date that construction is completed on permanent school facilities.

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

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

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

SEPA means the State Environmental Policy Act.

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

***Standard of Service** means the standard adopted by the District which identifies the program year, the class size by grade span and taking into account the requirements of students with special needs, the number of classrooms, the types of facilities the District believes will best serve its student population, and other factors as identified in the District's Capital Facilities Plan. The District's standard of service shall not be adjusted for any portion of the classrooms housed in portable facilities which are used as transitional facilities or from any specialized facilities housed in relocatable facilities.

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

***Student Factor [Student Generation Rate (SGR)]** means the number of students of each grade span (elementary, middle/jr. high, high school) that the District determines are typically generated by different dwelling unit types within the District. The District will use a survey or statistically valid methodology to derive the specific student generation rate, provided that the survey or methodology is approved by the Snohomish County Council as part of the adopted Capital Facilities Plan for the District.

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

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

Unhoused Students means students projected to be housed in classrooms where class size exceeds standards within the District and, if the District so specifies in the Capital Facilities Plan, students projected to be housed in portable classrooms.

WAC means the Washington Administrative Code.

Section 3: Minimum Level of Service

Creating a quality educational environment is the first priority of the Sultan School District. School facility and student capacity needs are often dictated by the types and amounts of space required to accommodate the District's adopted minimum level of service (MLOS) for both facility use and educational program. The educational program standards that typically drive facility space needs include grade configuration, optimum facility size, class size, educational program offerings, classroom utilization and scheduling requirements, and use of portable classroom facilities.

MLOS for Elementary School Facilities

- Class size for grades K-3 will not exceed an average of 24 students per classroom.
- Class size for grades 4- 5 will not exceed an average of 28 students per classroom.

District Goals for Elementary School Educational Programs

- Educational programs will be provided in a single shift each day. The facility will be available after normal hours for extended learning opportunities for selected students.
- Educational programs will be provided on the traditional school year schedule.
- Special education for students may be provided in regular classes when inclusion is possible and in resource rooms, or self-contained classrooms when this is the most appropriate option available.
- All students will be provided music and physical education in a separate classroom.
- All students will be housed in permanent facilities.
- Optimum design capacity for new elementary schools is 400 students. However, actual capacity of an individual school may vary depending on the educational program offered.

MLOS for Secondary School Facilities

- Class size for grades 6-8 will not exceed an average of 30 students per classroom (except PE and Music).
- Class size for grades 9-12 will not exceed an average of 32 students per classroom (except PE and Music).

District Goals for Secondary School Educational Programs

- Educational programs will be provided in a single shift each school day. The facility will be available after normal hours for extra-curricular activities and for extended learning opportunities for selected students.
- Educational programs will be provided on a traditional school year schedule.

- As a result of scheduling conflicts for student programs, the need for specialized rooms for certain programs, and the need for teachers to have a workspace during planning periods, it is not possible to achieve 100% utilization of all regular teaching stations throughout the day. Therefore, classroom capacity* should be adjusted to reflect the use of one period per day for the aforementioned needs.

- Special education for students may be provided in regular classes when inclusion is possible, in resource rooms (pullout model), or in self-contained classrooms when this is the most appropriate option available.

- All students will be housed in permanent facilities.

- Optimum design capacity for a new middle school is 540 students and for a new high school is 700 students. However, actual capacity of an individual school may vary depending on the educational program offered.

- Identified students will also be provided other nontraditional educational opportunities in classrooms designated as follows:

  Vocational Classrooms (i.e. business, auto shop, home-family life)

  Program Specific Classrooms (i, e, music, drama art physical education, computer labs, study rooms, etc.)

District Goals for District-wide Educational Programs

Special programs offered by the District at specific school sites include:

- Sno-Isle Skills Center (cooperative vocational technical school)
- Special Educational classes for Birth-Three through high school
- Speech and Language Therapy
- Occupational Therapy
- Physical Therapy
- School Psychology
- Title I/LAP
- Bilingual Education
- Extended Day Kindergarten
- Running Start
- Preschool
- Drug and Alcohol Intervention
- Summer School
- Vocational and career education
- Music
- Physical education
- Multi-age classrooms
- Technology education

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 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, or impact upon core facilities such as restrooms, library space, playground space, hallways, etc.

*The current negotiated agreement with certificated staff requires that one period per day at both the middle school and the high school be allotted for teacher planning time. Elementary school teachers are allocated 45 minutes each day for planning time. The middle school, which has a six period day, operates at 83.3% capacity. The high school, which has a six period day, operates at 82% capacity.

Section 4: Capital Facilities Inventory

CAPITAL FACILITIES

Under the GMA, public entities are required to inventory capital facilities used to serve existing development.

Capital facilities are defined as any structure, improvement, piece of equipment or other major asset, including land that has a useful life of at least ten years. 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. School facility capacity was inventoried based on the space required to accommodate the District's adopted educational program standards (see Section 3).

Schools

The District operates two elementary schools, one middle school and one high school. Currently the elementary schools accommodate grades K-5, the middle school serves grades 6-8 and the high school provides for 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.

Table 1
School Capacity Inventory

Elementary School	Site Size (Acres)	Building Area (Square Feet)	Teaching Stations	Permanent Capacity
Sultan Elementary	9.00	52,661	19	481
Gold Bar Elementary	10.22	33,723	12	304
TOTAL	**19.22**	**86,384**	**31**	**785**

Middle School	Site Size (Acres)	Building Area (Square Feet)	Teaching Stations	Permanent Capacity
Sultan Middle School	9.4	66,912	21	545
TOTAL	**9.4**	**66,912**	**21**	**545**

High School	Site Size (Acres)	Building Area (Square Feet)	Teaching Stations	Permanent Capacity
Sultan High School	35.0	71,876	24	527
TOTAL	**35.0**	**71,876**	**24**	**527**

Portable Classrooms

Portable classrooms are used as interim classroom space to house students until funding can be secured to construct permanent classrooms. The Sultan School District currently uses 28 portable classrooms at various school sites throughout the District to provide the additional interim capacity. A typical portable classroom can provide capacity for a full-size class of students, however; several are currently used for special education students and the Title I program which have lower class sizes.

Table 2
Portable Classroom Inventory

Elementary School	Portable Classrooms	Interim Capacity
Gold Bar Elementary	8	202
Sultan Elementary	8	202
TOTAL	**16**	**404**

Middle School	Portable Classrooms	Interim Capacity
Sultan Middle School	5	150
TOTAL	**5**	**150**

High School	Portable Classrooms	Interim Capacity
Sultan High School	7	224
TOTAL	**7**	**224**

GRAND TOTAL	**28**	**778**

Support Facilities

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

Table 3
Support Facility Inventory

Facility	Building Area (Square Feet)
Administration	3,149
Gymnasium	6,000
Bus Garage/Storage	7,200
TOTAL	**16,349**

Land Inventory

The District owns a 40 acre site which is planned to be the future site of a proposed new middle school. The District does not own any other possible school sites.

Section 5: Student Enrollment Projections

Student Enrollment Projections 2006 - 2011

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

The District has two methodologies available to it for enrollment projections. First, there are the projections from the Office of Superintendent of Public Instruction (OSPI). The OSPI projections (considered a lagging indicator) are based upon a modified "cohort survival method" which uses historical enrollment data from the 5 previous years to forecast the number of students who will be attending school the following year. Notably, the cohort survival method does not consider enrollment increases based upon new development. The second approach to enrollment projections is termed the "ratio method" and comes from estimates based upon County population as provided by the Office of Financial Management (OFM).

The two enrollment forecasts were conducted for the Sultan School District and are reflected in Table 4.

Notably, the OSPI projections predict that the District's enrollment will actually decline over the next six years. In contrast, the OFM ratio method suggests significant growth in the District from new development. The OSPI projections may be influenced by the fact that new development in the District since 2000 has been suppressed by water and sewer capacity issues in the City of Sultan (which have since been resolved or are in the process of being resolved).

Given the disparity between the OSPI and OFM projections, the District has developed its own methodology for forecasting future enrollments. This methodology, a modified cohort survival method, considers the cumulative effect of the recent enrollment trends and suppressed development, and the projected residential development within the District based upon the recent update to the Snohomish County Comprehensive Plan. The District methodology uses the cohort projections developed by the Office of the Superintendent of Public Instruction as a baseline and then applies a growth factor for each year through 2019. *See Appendix A.* The average growth factor applied for the six year period of this CFP is 1.10% of enrollment growth per year. This growth factor was determined by using the District's recent enrollment trends, which include an average growth factor of 0.55% per year between the years 2000 and 2005. The District will revisit its enrollment projections in future updates to this CFP.

Using the modified cohort survival projections, a total enrollment of 2,318 (FTE) is expected in 2011. In other words, the District expects the enrollment of 147 additional students between 2006 and 2011. *See* Table 4.

Table 4
Comparison of Projected Student Enrollments
Ratio Method vs. Cohort Survival System
2006-2011

Method	2005	2006	2007	2008	2009	2010	2011	Projected Change 2005-2011	Percent Change 2005-2011
County/OFM	2,171*	2,299	2,427	2,555	2,683	2,811	2,941	770	35.50%
OSPI	2,171*	2,153	2,141	2,117	2,083	2,057	2,026	-145	-6.68%
District	2,171*	2,195	2,219	2,243	2,268	2,293	2,318	147	7
Population Projections from County for SSD #311							16,429		

Note ~ The percentage of FTE to general population was calculated by using an "enrollment to population" factor of 17.9%, which represents the actual percentage of enrollment to population in 2001.

* Actual FTE enrollment, October 2005

Based upon the "cohort survival methodology", the District's enrollment will decline by a total of 145 students by October 2011, a decrease of 6.68% from the 2005 enrollment levels. Notably, the cohort survival projections do not consider growth from new development within the District.

OFM population-based enrollment projections were estimated using OFM population forecasts for the County, based on the 2025 population targets corresponding to the Future Land Use Map, adopted by the Snohomish County Council on December 21, 2005. Between 1990 and 2001, the District's enrollment constituted approximately 17.9% of the District's total population. Assuming that between 2006 and 2011 the District's FTE enrollment will continue to constitute 17.9% of the District's total population, and using OFM/County data, a total enrollment of 2,941 students is projected for 2011. This is an increase of 770 students over the six-year period.

Section II of ESHB 2929 (The Growth Management Act) requires that planning for public facilities be based on the 20 year population projections developed by OFM. DCTED has interpreted this element of the Act to mean the OFM population forecasts are minimums, which must be accommodated. Where the OSPI projections exceed those based upon the ratio method, the OSPI estimates can be used.

In order to calculate the percentage of students at each grade level for each of the years from 2006 through 2011, the District identified the percentage of students currently enrolled in each grade and grade span. These percentages were then applied to the annual student population projections. Please refer to Table 5 below.

Table 5
Projected Student Enrollment By Grade Groupings
Modified Cohort Projections
2006-2011

Grade Level	% Total	2005	2006	2007	2008	2009	2010	2011
Elementary (K-5)	40.86%	887*	897	907	917	927	937	947
Middle School (6-8)	27.36%	594*	600	607	613	619	625	634
High School (9-12)	31.80%	690*	698	705	713	720	728	737
Total	100%	2,171*	2,195	2,220	2,244	2,269	2,294	2,318

*** Actual FTE Enrollment, October 2005.**

Note: The number of students at each grade grouping for each of the years in this table was derived by multiplying the percentage of students in each grade level to the District's total student population (based on 2005 enrollment numbers).

Enrollment Projections - 2025

Although student enrollment projections beyond 2011 are highly speculative, they are useful for developing long-range comprehensive plans. These long-range enrollment projections may also be used in determining future site acquisition needs.

Using the OFM student-population factor of 17.9% for the year 2025, an estimated student population of 4,040 is projected. The 2025 estimate represents a 86.1% increase over the current October 2005 enrollment level.

Table 6
Projected Enrollment 2025

Grade Span	2005*	2025
Elementary (K-5)	887	1,650
Middle School (6-8)	594	1,105
High School (9-12)	690	1,285
District Total	2,171	4,040

* Actual FTE Enrollment, October 2005

Section 6: Capital Facility Needs

The projected available student capacity was determined by subtracting permanent school capacity (excluding portables) from projected student enrollment for each of the six years in the forecast period (2006-2011).

Capacity needs are expressed in terms of "unhoused students". Unhoused students are defined as students expected to be housed in portable classrooms, or classrooms where class size exceeds State and/or District standards, or contractually negotiated agreements within the local school district. Table 7 depicts the anticipated unhoused students by 2011.

Table 7
Unhoused Students
2011

Grade Span	Current Capacity	Projected Enrollment	Unhoused Students
Elementary (K-5)	785	647	162
Middle School (6-8)	545	634	89
High School (9-12)	527	737	210

NOTE: The District plans to reorganize the elementary schools' grade span from K-5 to K-4 during the six years of this Plan (please refer to page 19 for additional details). For purposes of determining unhoused students in 2011 if no capacity adjustments or improvements are made in the District, the District has used the current grade span (Table 7). However, Table 8 analyzes the unhoused students in the District in anticipation of the capacity adjustments and improvements.

The method used to define future capacity needs assumes no new construction. For this reason planned construction projects are not included at this point. This factor is added later (see Table 15).

Projected future capacity needs and the proposed re-grouping of grade levels at the elementary and middle school are depicted on Table 8 and are derived by applying the projected enrollment to the capacity existing in October 2005. This table shows actual space needs and the portion of those needs that are "growth related" for the years 2006 – 2011.

Table 8
Additional Unhoused Students
2006-2011

Grade Span	2005	2006	2007	2008	2009	2010	2011		2006-2011 Pct. Growth Related
Elementary (K-4)*									
Total Projected Enrollment	705	713	722	729	737	746	753		
Capacity of Facilities	785	785	785	785	785	785	785		
Additional Unhoused Students		0	0	0	0	0	0		0%
Middle School (5-8)*									
Total Projected Enrollment	776	784	793	801	810	819	828		
Capacity of Facility	545	545	545	545	545	545	545		
Current Unhoused Students	231	231	231	231	231	231	231		
Additional Unhoused Students		8	17	25	34	43	52		18.40%
Total Unhoused Students	231	239	248	256	265	274	283		
High School (9-12)									
Total Projected Enrollment	690	698	706	714	722	729	737		
Capacity of Facility	527	527	527	527	527	527	527		
Current Unhoused Students	163	163	163	163	163	163	163		
Additional Unhoused Students		8	16	24	32	39	47		22.40%
Total Unhoused Students	163	171	179	187	195	202	210		

*In order to accommodate growth needs, the District plans to reorganize the elementary schools' grade span from K-5 to K-4 during the six years of this Plan. For purposes of determining unhoused students, Table 8 assumes this reorganization will occur during the first plan year. However, the timing of the actual grade reorganization is still under consideration by the District. See page 19 for more information.

By the end of the six year forecast period (2011), additional permanent student capacity will be needed as follows:

Table 9
Additional Permanent Student Housing
2011

Grade Span	Unhoused Students 2011	Average No. Of FTE Per Classroom	Additional Classrooms Needed
Elementary (K-4)	0	24.8	0
Middle School (5-8)	283	29.5	9.6
High School (9-12)	493	32	6.6
District Totals	493		

Planned Improvements

Current enrollment at each school span (elementary, middle and high school) is identified in Table 5. Drawing capacities from Table 1 and Table 8, one can see that the District is currently over capacity at the middle school by 231 students and at the high school by 163 students.

The District expects that 0.630 students will be generated from each new single family home in the District and that 0.367 students will be generated from each apartment in a new multi-family unit. These numbers are based upon the District's student generation rates. Please refer to Table 11 and Appendix B.

The District's enrollment projections, in Table 7, have been applied to the existing capacity and the District will be over capacity at the middle school level by 283 students and at the high school by 210 students if no capacity improvements are made by the year 2011. See Tables 8 and 9.

To accommodate the projected growth, the District is anticipating the construction of a second middle school, an addition to the current high school and reorganizing the grade span groupings at the elementary and middle school levels.

The following is a brief outline of those projects needed to accommodate unhoused students in the Sultan School District through the year 2011. The District has been in the process of developing a fully articulated plan, which includes input from both the community and staff, and exploring a variety of facility options. Currently, the Board favors the presentation a bond issue to the voters in the Sultan School District during the 2008 school year. The planned improvements will address both existing deficiencies and projected new growth.

Elementary Schools

If the District is to meet a goal of housing all students in permanent facilities, it will be necessary to generate 16 new elementary classrooms by 2011. The current thinking is that the District will need to reorganize the elementary schools' grade span from K-5 to K-4. The 2011 projection for K-5 is 947 students. The reorganization of the elementary schools to a grade span of K-4 would leave us with a projected enrollment of 753 students. The current capacity for the elementary schools is 785. Therefore, the reorganization would leave a more palatable number of students to house at this level.

Middle Schools

The 2011 FTE student projection for the middle school is 805. Reorganizing the middle school from 6-8 to 5-8 would bring the anticipated enrollment for the middle school up to 828. The current capacity of the middle school is 545 FTE students. Current plans include the possibility of building a new middle school to assist with the housing of the middle school students. The District has a planned site for the new middle school.

High School

The plan includes adding six classrooms and a gym onto the high school as a means of accommodating the projected growth in student FTE.

Interim Classroom Facilities (Portables)

During the planning and construction of the new middle school and the addition to the high school, the District will purchase portables as needed. However, it remains a District goal to house all students in permanent facilities.

Forecast of Future Facility Needs for the Next Twenty Years

Based upon enrollment projections for the ensuing Twenty Year planning period, the Sultan School District anticipates the following facilities to accommodate it needs: two new elementary schools, conversion of the existing high school to a junior high school, and construction of a new high school.

Section 7: Financial Plan

Funding of school facilities is typically secured from a number of sources including voter approved bonds, State matching funds and development impact fees. Each of these sources is discussed in greater detail below.

General Obligation Bonds

Bonds are typically used to fund construction of new schools and other capital improvement projects. A 60% voter approval is required to pass a bond. Bonds are then retired through collection of property taxes. It should be understood that while the District is nearing completion of a plan for accommodating current and future capacity needs, the School Board has not finalized its plan on the scope and timing of a future bond issue. General Obligation Bonds would be the primary source of funding for future capital improvement projects.

State Matching Funds

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

If a District's project qualifies, it can become part of a State prioritization system. This system prioritizes allocation of available funding resources to school districts statewide based on seven prioritization categories. Funds are then disbursed to the districts based on a formula which calculates district assessed valuation per pupil relative to the whole State assessed valuation per pupil to establish the percent of the total project cost to be paid by the State. The State contribution can range from 20% (State minimum) to 99.5% of the project's cost for those aspects of school construction that the State is willing to match.

A school district's matching ratio is the inverse function of it's assessed valuation per pupil as compared to that of the State. That is to say that the more a school district's assessed valuation per pupil increases, as compared to the State average assessed valuation per pupil, the smaller its ratio becomes. In the case of the Sultan School District its matching ratio, as of June 1, 2005, was 61.07%

State matching funds can only be applied to major school construction projects. Site acquisition and minor improvements are not eligible to receive matching funds from the State. Because availability of State matching funds has not been able to keep pace with the rapid enrollment growth occurring in many of Washington's school districts, matching funds from the State may not be received by a school district until after a school has been constructed. In such cases the district must "front fund" a project. That is, the district must finance the complete project with local funds (the State's share coming from funds allocated in future district projects). When the State share is finally disbursed (without accounting for cost escalation) a district's project is partially reimbursed.

Sultan School District's Eligibility for State Match

To qualify for State Match the District must meet a number of OSPI requirements. Two major requirements have to do with unhoused students and the securing of local funds for the District's share of the construction cost. Using the required OSPI approach to calculating unhoused students (total square footage of the facility divided by the allotted square feet per student) and the five-year enrollment projection (required to use the cohort survival system), the District clearly fails to meet the first requirement. Thus regardless of the outcome of a future bond issue, the district will not qualify for State Match due to failing to meet the initial requirement.

Impact Fees

Development impact fees have been adopted by a number of jurisdictions as a means of supplementing traditional funding sources for construction of public facilities needed to accommodate new development. School impact fees are generally collected by the permitting agency at the time building permits or certificates of occupancy are issued. A detailed discussion on impact fees is provided later in this section.

Six-Year Financial Plan

The Six-Year Financial Plan shown on Table 13 illustrates possible ways the Sultan School District might fund new construction and improvements to school facilities for the years 2006 through 2011. The financing components include possible funding from capital bonds and levies, development impact fees collected under the GMA or other local funding, and State matching funds (dependent upon qualifying, level of funding and availability of funds).

The financing plan separates projects that add capacity from those which do not, since the latter are generally not appropriate for impact fee funding.

Impact Fee Calculation

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/studio or 1-bedroom
3. Multi-family/2-bedroom or more;

Impact Fees in Snohomish County

In November 1997, Snohomish County substantially modified Title 26C to convert it into an impact fee program meeting new requirements of the GMA and changes to RCW 82.02, the State law authorizing impact fees. On February 1, 2003, Snohomish County adopted a revision of Title 26C, thus replacing it with Chapter 30.66C, as defined by the Uniform Development Code.

Chapter 30.66C requires school districts to prepare and adopt Capital Facilities Plans meeting the specifications of the GMA. Impact fees calculated in accordance with the formula in Chapter 30.66C will become effective following County Council adoption of the District's plan. Generally, impact fee ordinances adopted by cities in Snohomish County that require compliance with the County's Chapter 30.66C criteria and which adopt the County-approved CFP by reference, will comply with the GMA. Local governments, of course, have the ability to adopt their own approach to impact fee assessment, provided the approach meets the requirements of GMA and RCW 82.02. Impact fees are not to be used for projects, or portions of projects, which address existing deficiencies.

Methodology and Variables Used to Calculate School Impact Fees

The 2006 impact fees for the Sultan School District are calculated on worksheets contained in Appendix C and are summarized on Table 14, at the end of this section.

Impact fees have been calculated utilizing the formula in Table 1 of Snohomish County Ordinance 97-095. 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 or install temporary facilities (portables). As required under GMA, credits have also been applied in the formula to account for State Matching 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 have been eliminated from the variables used in the calculations as indicated in Table 14. 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. For purposes of this Plan, the District has chosen to use the full project costs in the fee formula. However, the growth related factors are shown on page 28 ("Table14 Impact Fee Variables"). Furthermore, impact fees will not be used to address existing deficiencies. See Table 13 for a complete identification of funding sources.

Calculation Criteria (See Table 14)

A. Site Acquisition Cost Element

Site Size
The site size gives the optimum acreage for each school type based on studies of existing school sites and OSPI Standards. Generally, districts will require 12-15 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.

The fee calculation for the Sultan School District reflects a 40 acre site which has already been acquired for the future new middle school.

Additional Capacity
Building capacities reflect both the District's optimum number of students each school type is designed to accommodate and the current program requirements. These figures are based on actual design studies of optimum floor area for new school facilities. The Sultan School District designs new elementary schools to accommodate 400 students, new middle schools 540, and new high schools 650 students.

Student Generation Factors
The student generation factors are 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 Ordinance 97-095, each school district is required to conduct student generation studies within their jurisdictions. This was done to "localize" generation rates for purposes of calculating impact fees. A description of this methodology is contained in Appendix C.

The student generation factors for the Sultan School District are shown on Table 11.

Table 11
Student Generation Factors

	Elementary (K-5)	Middle School (6-8)	High School (9-12)	Total (K-12)
Single Family	0.330	0.161	0.139	0.630
Multi-Family, 1 Bdrm	0.000	0.000	0.000	0.000
Multi-Family, 2+ Bdrm	0.167	0.133	0.067	0.367

B. School Construction Cost Variables

Additional Capacity (See description under subsection 1 above)
Current Facility Square Footage: These numbers are taken from Table 1, Section 4. 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 Ordinance 97-095.

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 in Table 12 and includes only capacity related improvements.

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

C. Tax Credits

Tax Credit Variables
Under Ordinance 97-095, a credit is granted to new development to account for taxes that will be paid to the school district over the next ten years. The credit is calculated using a "present value" formula.

Interest Rate (20-year Go Bond)
This is the interest rate of return on a 20-year General Obligation Bond and is derived from the bond buyer index. The current assumed interest rate is 4.57% (April 2006).

Levy Rate (in mils)
The capital construction levy rate is determined by dividing the District's average capital property tax rate by one thousand. The current property tax levy rate for the Sultan School District is 1.589/1,000.

Average Assessed Value
This figure is based on the District's average assessed value for each type of dwelling unit (single-family and multiple-family). The average assessed values are based on estimates made by the County's Planning and Development Services Department utilizing information from the Assessor's files. The current average assessed value for single-family detached residential dwellings is $168,474, $77,591 for one-bedroom units, and $114,024 for two or more bedroom units.

Time Remaining on Bonds
This is the average amount of time remaining on Capital Projects/General Obligation Bonds issued by the District. The average time remaining on bonds issued by all Snohomish County school districts is assumed to be 10 years for purposes of calculating this credit.

D. Adjustments

Discount

In accordance with Ordinance 97-095, all fees calculated using the above factors reflect the County's required discount of 50%.

Proposed Impact Fee Schedule

Using the variables and formula described, impact fees proposed for the Sultan School District have been summarized in Table 12 (refer to Appendix C for worksheets). The fee totals reflect the discount imposed by County Ordinance 97-095.

Table 12
School Impact Fees - 2006

Housing Type	Impact Fee Per Unit
Single Family Detached	$2,878
Multi-Family (1 Bedroom)	$0
Multi-Family (2+ Bedrooms)	$1,931

Table 13
Capital Facilities Plan
2006-2011

Improvements Adding Capacity (Costs in Millions)

Project	2006	2007	2008	2009	2010	2011	Total Cost	Bonds/ Levys	State Match	Impact Fees	Future Sources
Elementary											
Purchase Portables		$0.120					$0.120	X			X
Middle School											
Purchase Portables					$0.240		$0.240	X		X	
New Middle School			$15.500				$15.500	X		X	X
Site Acquisition											
High School											
Purchase Portables		$0.120			$0.120		$0.240	X		X	
High School Addition			$5.125				$5.125	X		X	X

Improvements Not Adding Capacity (Costs in Millions)

Project	2006	2007	2008	2009	2010	2011	Total Cost	Bonds/ Levy	State Match	Impact Fees	Future Sources
Transportation Facility					$1.800		$1.800	X			X
District Office Renovation						$0.190	$0.190	X			X

Total Improvements (Costs in Millions)

	2006	2007	2008	2009	2010	2011	Total Cost	Bonds/ Levy	State Match	Impact Fees	Future Sources
Elementary		$0.120					$0.120				
Middle School		$0.120	$15.500		$0.240		$15.860	X		X	X
High School			$5.125		$0.120		$5.245	X		X	X
Districtwide Improvements					$1.800	$0.190	$1.990	X			X
TOTALS		**$0.240**	**$20.625**		**$2.160**	**$0.190**	**$23.215**	X		X	X

Table 14
Impact Fee Variables

Criteria	Elementary School	Middle School	High School
Site Acquisition Cost Element			
Site Needs (acres)			
Cost Per Acre			
Total Land Cost			
Additional Capacity			
Student Generation Factors			
Single Family	0.330	0.161	0.139
Multiple Family 1 Bdrm	0.000	0.000	0.000
Multiple Family 2+ Bdrm	0.167	0.133	0.067
School Construction Cost Element			
Additional Capacity		540	202
Current Facility Square Footage	86,384	66,912	71,876
Sq. Ft. After Construction	86,384	133,824	89,845
Estimated Facility Construction Cost		$15,500,000	$5,500,000
Portable Facilities Cost Element			
Existing Units		5	7
Cost Per Unit		$80,000	$80,000
Portable Facilities Capacity/Unit		30.00	32.00
Total Portable Facilities Capacity		150	224
Existing Portable Square Footage		4,480	6,272
State Matching Funds			
Boeckh Index		$154.22	$154.22
School Space per Student (OSPI)		103.5	130
State Match Percentage		61.07%	61.07%
Percent of State Match To Be Received		0%	0%
Tax Payment Credit			
Interest Rate		4.57%	4.57%
Loan Payoff (Years)		10	10
Property Tax Levy Rate		0.001589	0.001589
Average AV per DU Type	$168,474 (Single Family)	$77,591 (MF 1 Bdrm)	$114,024 (MF 2+ Bdrm)
County Required Discount Rate	50%	50%	50%

Table 15
Projected Capacity Surplus (Deficit)
After Programmed Improvements

Year	Elementary School	Middle School	High School
2006			
Existing Capacity	785	545	527
Programmed Improvement Capacity	0	0	0
Capacity After Improvement	785	545	527
Projected Enrollment	897	600	698
Surplus (Deficit) After Improvement	-112	-55	-171
2007			
Existing Capacity	785	545	527
Programmed Improvement Capacity	0	0	0
Capacity After Improvement	785	545	527
Projected Enrollment	907	607	705
Surplus (Deficit) After Improvement	-122	-62	-178
2008			
Existing Capacity	785	545	527
Programmed Improvement Capacity	0	540	202
Capacity After Improvement	785	1,085	729
Projected Enrollment	729	801	714
Surplus (Deficit) After Improvement	56	-256	-187
2009			
Existing Capacity	785	1,085	729
Programmed Improvement Capacity	0	0	0
Capacity After Improvement	785	1,085	695
Projected Enrollment	737	810	722
Surplus (Deficit) After Improvement	48	275	7
2010			
Existing Capacity	785	1,085	729
Programmed Improvement Capacity	0	0	0
Capacity After Improvement	785	1,085	729
Projected Enrollment	746	819	729
Surplus (Deficit) After Improvement	39	266	0
2011			
Existing Capacity	785	1,085	729
Programmed Improvement Capacity	0	0	0
Capacity After Improvement	785	1,085	729
Projected Enrollment	753	828	737
Surplus (Deficit) After Improvement	32	257	-206

Note: Grade spans for 2008 modified to K-4 and 5-8 from K-5 and 6-8.

New middle school and addition to high school open for service in 2008.

Appendix A
Enrollment Projections

Table A-1
Student Projected Enrollment (FTE)
Modified Cohort Survival
2006-2011

School Type	Grade Level	2006	2007	2008	2009	2010	2011
Elementary	K	77	83	86	91	95	100
	1	149	151	153	154	156	158
	2	152	153	155	157	158	160
	3	175	178	179	181	184	184
	4	162	164	166	168	170	172
	5	184	187	189	191	193	195
Middle School	6	180	182	184	186	188	190
	7	214	215	218	220	223	225
	8	206	209	210	213	215	218
High School	9	206	209	211	213	216	218
	10	187	189	191	193	195	197
	11	158	159	162	164	165	167
	12	147	149	150	152	154	155
Total		**2,195**	**2,220**	**22,244**	**2,269**	**2,294**	**2,318**
Grades K-4 (FTE)		713	722	729	737	746	753
Grades 5-8 (FTE)		784	793	801	810	819	828
Grades 9-12 (FTE)		698	706	714	722	729	737
Total		**2,195**	**2,220**	**2,244**	**2,269**	**2,294**	**2,318**

Table A-2
Student Projected Enrollment (FTE)
Ratio Method
2006-2011

School Type	Grade Level	2006	2007	2008	2009	2010	2011
Elementary	K	77	83	86	91	95	100
	1	157	166	174	182	192	201
	2	158	166	175	184	193	202
	3	183	193	204	214	224	234
	4	171	180	190	199	209	218
	5	193	203	214	225	236	246
Middle School	6	189	199	210	220	231	241
	7	223	236	248	261	273	286
	8	217	229	241	253	265	278
High School	9	216	228	240	252	264	276
	10	195	206	217	228	238	249
	11	165	175	184	193	202	212
	12	155	163	172	181	189	198
Total		**2,299**	**2,427**	**2,555**	**2,683**	**2,811**	**2,941**
Grades K-4 (FTE)		747	788	830	871	913	955
Grades 5-8 (FTE)		822	867	913	959	1,005	1,051
Grades 9-12 (FTE)		731	772	813	853	894	935
Total		**2,299**	**2,427**	**2,555**	**2,683**	**2,811**	**2,941**

STATE OF WASHINGTON
SUPERINTENDENT OF PUBLIC INSTRUCTION
OLYMPIA

REPORT NO. 1040
RUN ON 11:17 NOV 03

DETERMINATION OF PROJECTED ENROLLMENTS

BY COHORT SURVIVAL KK LINEAR PROJECTION

SULTAN DISTRICT NO. 311 SNOHOMISH COUNTY NO. 31

	----ACTUAL ENROLLMENTS ON OCTOBER FIRST---						AVER. %	---------PROJECTED ENROLLMENTS--					
	2000	2001	2002	2003	2004	2005	SURVIVAL	2006	2007	2008	2009	2010	2011
KINDERGARTEN	153	143	141	143	143	147		142	141	141	140	139	138
GRADE 1	153	158	156	160	146	148	106.28	156	151	150	150	149	148
GRADE 2	182	157	178	154	157	149	102.83	152	160	155	154	154	153
GRADE 3	201	189	177	164	155	173	103.91	155	158	166	161	160	160
GRADE 4	181	201	199	181	176	161	103.74	179	161	164	172	167	166
GRADE 5	188	194	211	206	181	182	103.61	167	186	167	170	179	173
GRADE 6	189	190	201	207	210	178	100.61	183	168	187	168	171	180
K-6 HEADCOUNT	1,247	1,232	1,203	1,215	1,168	1,138		1,134	1,125	1,130	1,115	1,119	1,118
K-6 W/K @ 1/2	1,171	1,161	1,193	1,144	1,097	1,065		1,063	1,055	1,060	1,045	1,050	1,049
GRADE 7	181	200	195	201	208	211	101.88	181	186	171	191	171	174
GRADE 8	182	181	205	193	195	205	99.41	210	180	185	170	190	170
7-8 HEADCOUNT	363	381	400	394	403	416		391	366	356	361	361	344
GRADE 9	175	169	180	179	181	204	95.60	198	201	172	177	163	182
GRADE 10	161	173	169	162	180	184	98.21	200	192	197	169	174	160
GRADE 11	135	162	156	137	154	156	90.71	167	181	174	179	153	158
GRADE 12	103	111	135	134	123	146	87.20	136	146	158	152	156	133
9-12 HEADCOUNT	574	615	640	612	638	690		699	720	701	677	646	633
K-12 HEADCOUNT	2,184	2,228	2,303	2,221	2,209	2,244		2,224	2,211	2,187	2,153	2,126	2,095

Appendix B
Student Generation Rates

Michael J. McCormick, FAICP

Planning Services **Growth Management** **Intergovernmental Relations**

April 11, 2006

Memorandum

To: Jerry Alles
Marianne Nasland

From: Mike McCormick

Re: 2006 Sultan School District Student Generation Rates (SGR)

This memorandum contains the 2006 Student Generation Rates (SGR) for both single family and multiple family residential development as required by Snohomish County.

The methodology used to produce these rates is consistent with the methodology previously developed and used for a number of school districts throughout this state. This methodology was used to produce the 1999-2000, 2002, and 2004 SGR's for the Sultan School District. The rates have been calculated for single family, one bedroom multiple family[1] and two or more bedrooms multiple family residential development. The survey area included all of the territory within the boundaries of the Sultan School District. The analysis is based on projects constructed between 2000 through 2004[2]. The primary sources of information are Snohomish County and the Sultan School District.

The process of analysis involved gathering the residential development data from 2000 through 2004 from the county. The addresses of each of these developments were matched with student addresses from this school year. These data were aggregated to show the number of students in each of the grade groupings for each type of residential development.

The primary source of the development activity is MetroScan data provided by the county[3]. Based on previous research, all duplex units are assumed to have two or more bedrooms. A comparison of the street addresses of the new developments with the addresses of each of the district's students from the current year (2005-2006) produced a

[1] There are no one bedroom multiple family units within the district.
[2] The usual time-span for development data is five years. The most recent complete five year interval is used. In this case, the 2005 information has not been added to the MetroScan data available through Snohomish County. Snohomish County staff agreed concurred with using this latest available set, absent the 2005 information. The SGR's can be easily updated if the 2005 data becomes available.
[3] The data provided by the county contained a variety of information including parcel number, land use code (including number of units), street address and year built. For the purpose of calculating the SGR's, street number and name were extracted for comparison with student addresses. The general assumption is that all units which are in the data are currently available for occupancy.

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record of each unit occupied by a student. This information was aggregated into the three grade groupings and produced student generation rates for single family and for both one bedroom and two or more bedrooms multiple family.

	Single Family[4]	Multiple Family[5]		
		All	1-bedroom[6]	2 or More
K through 5	**0.330**	**0.167**	**0.000**	**0.167**
6 through 8	**0.161**	**0.133**	**0.000**	**0.133**
9 through 12	**0.139**	**0.067**	**0.000**	**0.067**
Total[7]	**0.630**	**0.367**	**0.000**	**0.367**

The SGR were calculated on a 100% sample of all single and multi-family constructed between 2000 and 2004. The data contain all residential development activity.

cc: Denise Stiffarm, Preston, Gates and Ellis

Attachments: Table-- Sultan School District—2006 Student Generation Rates

[4] A total of 560 single family residential units constructed between 2000 and 2004 were identified within the school district boundary. There are a total of 353 students from these units.
[5] A total of 30 multi-family units (two or more units per structure) were constructed between 2000 and 2004. These are all duplexes with two or more bedrooms. There are a total of 30 students from these units. This is a very small number of multiple family units. A small change in the number of students associated with this type of unit can have a significant impact on the resulting SGR's.
[6] There are no new one bedroom multiple family units in the district. All duplexes are assumed to have two or more bedrooms, which is supported by previous field research and analysis which was undertaken in other Snohomish County school districts by this consultant.
[7] Totals may not balance due to rounding.

Appendix C
Impact Fee Calculations

SCHOOL IMPACT FEE CALCULATIONS									
DISTRICT	Sultan School District								
YEAR	2006								
School Site Acquisition Cost:									
((AcresxCost per Acre)/Facility Capacity)xStudent Generation Factor									
	Facility Acreage	Cost/ Acre	Facility Capacity	Student Factor SFR	Student Factor MFR (1)	Student Factor MFR (2+)	Cost/ SFR	Cost/ MFR (1)	Cost/ MFR (2+)
Elementary	0.00	$ -	400	0.330	0.000	0.167	$0	$0	$0
Middle	0.00	$ -	540	0.161	0.000	0.133	$0	$0	$0
High	0.00	$ -	210	0.139	0.000	0.067	$0	$0	$0
						TOTAL	$0	$0	$0
School Construction Cost:									
((Facility Cost/Facility Capacity)xStudent Generation Factor)x(permanent/Total Sq Ft)									
	%Perm/ Total Sq.Ft.	Facility Cost	Facility Capacity	Student Factor SFR	Student Factor MFR (1)	Student Factor MFR (2+)	Cost/ SFR	Cost/ MFR (1)	Cost/ MFR (2+)
Elementary	85.77%		400	0.330	0.000	0.167	$0	$0	$0
Middle	93.72%	$ 15,500,000	540	0.161	0.000	0.133	$4,331	$0	$3,578
High	91.97%	$ 5,500,000	202	0.139	0.000	0.067	$3,481	$0	$1,678
						TOTAL	$7,812	$0	$5,256
Temporary Facility Cost:									
((Facility Cost/Facility Capacity)xStudent Generation Factor)x(Temporary/Total Square Feet)									
	%Temp/ Total Sq.Ft.	Facility Cost	Facility Size	Student Factor SFR	Student Factor MFR (1)	Student Factor MFR (2+)	Cost/ SFR	Cost/ MFR (1)	Cost/ MFR (2+)
Elementary	14.23%	$ -	26	0.330	0.000	0.167	$0	$0	$0
Middle	6.28%	$ 80,000.00	30	0.161	0.000	0.133	$27	$0	$22
High	8.03%	$ 80,000.00	32	0.139	0.000	0.067	$28	$0	$13
					TOTAL		$55	$0	$36
State Matching Credit:									
Boeckh Index X SPI Square Footage X District Match % X Student Factor									
	Boeckh Index	SPI Footage	District Match %	Student Factor SFR	Student Factor MFR (1)	Student Factor MFR (2+)	Cost/ SFR	Cost/ MFR (1)	Cost/ MFR (2+)
Elementary	$ 154.22	0	61.07%	0.330	0.000	0.167	$0	$0	$0
Middle	$ 154.22	0	61.07%	0.161	0.000	0.133	$0	$0	$0
Sr. High	$ 154.22	0	61.07%	0.139	0.000	0.067	$0	$0	$0
					TOTAL		$0	$0	$0
Tax Payment Credit:							SFR	MFR (1)	MFR (2+)
Average Assessed Value							$168,474	$77,591	$114,024
Capital Bond Interest Rate							4.57%	4.57%	4.57%
Net Present Value of Average Dwelling							$1,328,511	$611,848	$899,143
Years Amortized							10	10	10
Property Tax Levy Rate							$1.59	$1.59	$1.59
	Present Value of Revenue Stream						$2,111	$972	$1,429
	Fee Summary:			Single Family	Multi-Family (1)	Multi-Family (2+)			
	Site Acquisition Costs			$0	$0	$0			
	Permanent Facility Cost			$7,812	$0	$5,256			
	Temporary Facility Cost			$55	$0	$36			
	State Match Credit			$0	$0	$0			
	Tax Payment Credit			($2,111)	($972)	($1,429)			
	FEE (AS CALCULATED)			$5,756	$0	$3,863			
	COUNTY DISCOUNT			$2,878	$0	$1,931			
	FINAL FEE			$2,878	$0	$1,931			
				1,673		1,221			

C. Appeals shall be filed with the city within 15 working days of the issuance of a building permit and payment of impact fees by filing a notice of appeal specifying the grounds thereof, and depositing an administrative fee in the amount of $300.00. The city planner/planning director and the district shall transmit to the city council all papers constituting the record for the determination.

D. The city council shall fix a time for the hearing of the appeal, give notice to the parties of record, and decide the same. At the hearing, any party may appear in person or by agent or attorney.

E. The action of the city council shall be taken by the adoption of a motion by the city council. When taking any such final action, the city council shall make and enter findings of fact from the record and conclusions thereof which support its action.

F. The action of the city council approving, modifying, or rejecting a decision of the city planner/planning director and/or district shall be final and conclusive, unless within 20 calendar days from the date of the city council action, District No. 311 or any fee-payer applies for a writ or certiorari to the Superior Court of Washington for Snohomish County, for the purpose of review of the action taken. (Ord. 814-03 § 1)

16.116.080 Authorization for the school interlocal agreement and the establishment of the schools impact fee account.

A. The mayor is authorized to execute, on behalf of the city, an interlocal agreement for the collection, expenditure, and reporting of school impact fees; provided, that such interlocal agreement comply with the provisions of this section.

B. As a condition of the interlocal agreement, District No. 311 shall establish a schools impact account. The account shall be an interest-bearing account.

C. For administrative convenience while processing the fee payments, school impact fees may be temporarily deposited in a city account; provided, that the city shall transfer the school impact fees and interest earned on the fees to the district or shall deposit the school impact fees and the interest earned on the fees in the schools impact fee account established by the district. Fees and interest earned on the fees shall be transferred to the district on a quarterly basis on March 31st, June 30th, October 31st or December 31st of each year.

D. Funds withdrawn from the schools impact account for District No. 311 must be used in accordance with the provisions of this chapter. The interest earned shall be retained in this account and expended for the purposes for which the school impact fees were collected.

E. On an annual basis, pursuant to the interlocal agreement, District No. 311 shall by resolution submit a report to the city council on the schools impact account containing information that all impact fees collected during the previous year are consistent with the capital facilities plan of the district and establishing the formula for the next ensuing year and showing the source and amount of all monies collected, earned, or received, and the public improvements that were financed in whole or in part by impact fees.

F. School impact fees shall be expended or encumbered within six years of receipt unless the city council identifies in written findings extraordinary and compelling reason or reasons for District No. 311 to hold the fees beyond the six-year period. Under such circumstances, the city council shall establish the period of time within which the impact fees shall be expended or encumbered after consultation with District No. 311. (Ord. 814-03 § 1)

16.116.090 Refunds.

A. If District No. 311 fails to expend or encumber the impact fees within six years of when the fees were paid, or where extraordinary or compelling circumstances exist or if such other time periods as established pursuant to SMC 16.116.080 exist, then the current owner of the property on which impact fees have been paid may receive a refund of such fees. In determining whether impact fees have been expended or encumbered, impact fees shall be considered expended or encumbered on a first in, first out basis.

B. The city shall notify potential claimants by first class mail deposited with the United States Postal Service at the last known address of such claimants. Potential claimant must be the legal owner of the property.

C. Owners seeking a refund of impact fees must submit a written request for a refund of the fees to the building official within one year of the date the right to claim the refund arises or the date that notice is given, whichever is later.

D. Any impact fees for which no application for a refund has been made within this one-year period shall be retained by District No. 311 and expended on the appropriate school facilities.

ATTACHMENT 2.

CITY OF SULTAN
Sultan, Washington

ORDINANCE NO. 959-07

AN ORDINANCE OF THE CITY OF SULTAN, WASHINGTON ADOPTING THE SULTAN SCHOOL DISCTICT #311 2006-2011 CAPITAL FACILITIY PLAN,AND. AMENDING CHAPTER 16.116 SCHOOL DISTRICT IMPACT FEES, AND SECTION 16.116.110 SCHOOL IMPACT FEES AND ADMINISTRATIVE FEES

WHEREAS, the City of Sultan on June 4, 2003 approved Ordinance N0. 814-03 amending Chapter 16.116~~5~~ School impact Fees of the Ssultan Municipal Code:

WHEREAS, the Sultan School Distinct #311 Board on August 28, 2006 adopted the 2006-2011 Capital facilities Plan ~~forro~~ the district; and

WHEREAS, the 2006-2011 Capital Facilities Plan adopted by School District #311 recommended ~~for~~ an increased in the school impact fees ~~fore~~ single family and multifamily units; and

WHEREAS, the Snohomish County Council in December of 2008~~7~~ adopted the Sultan School District # 311 2006-2011 Capital Facility Plan including the increase~~sd~~ in impact fees ~~foro~~ single family and multifamily units; and

WHEREAS, the Sultan School District #311 requested the City of Sultan to increase the school district's impact fees for single family and multifamily family units as recommended by the District's 2006-2011 Capital Facility Plan; and

WHEREAS , the City of Sultan City Council in 2005 docketed the incorporation of the Sultan School District #311 Capital Facility Plan into the City's Comprehensive Plan as a referenced document; and

WHEREAS, the City of Sultan Planning Board conducted a Public Hearing on August 7, 2007 to consider the Sultan School District #311 2006-2011 Capital Facilities Plan and the increase in school impact fees for single family and multifamily units as recommended by the plan; and

WHEREAS, the City of Sultan Plan Board at the conclusion of the August 7, 2007 Public Hearing and in consideration of the testimony and information presented at the Hearing recommended adoption of the Sultan School District #311 2006-2011 Capital Facilities Plan and the increases in impact fees as recommended by the plan: and

WHEREAS, The City of Sultan City Council on September 13, 2007 conducted a public hearing on the Sultan School Distinct #311 2006-2011 Capital Facility Plan and the increases in impact fees for single family and Multifamily units; and

WHEREAS , the City Council closed the September 13, 2007 public hearing and considered the

Attachment 3

Planning Board's recommendation and the testimony and information presented at the hearing.

NOW, THEREFORE, it is ordained by the City Council of the City of Sultan, Washington as follows:

Section 1. The Ccity of Sultan hereby adopts the Sultan School District #311 2006-2011 Capital Facility Plan and incorporates said Plan into the City's Comprehensive Plan as Appendix H.~~the recommended increases in the impact fees for single family and multi family units.>~~

Section 2. Based upon the Sultan School District #311 2006-2011 Capital Facility Plan adopted in section 1 hereof, Appendix A of SMC Ssection 16.166.110 School impact fees and administrative fees is hereby amended to reads as follows:

Appendix A

School Impact Fees (Applies to residential development only)

Housing Type (per unit)

Single-Family Detached Dwellings and each unit in a Duplex (including mobile homes) $2,878.00

One Bedroom Multi-family Units 0

Two (or more?0+ plus Bedroom Multifamily-Family Units $1,931.00

~~**Section 3.** The Sultan School District #311 2006-2011 Capital F is included in the city of Sultan Comprehensive Plan as a reference document~~.

Section 4. Severability. Should any provision of this Ordinance be determined unlawful, the balance of this Ordinance shall be unaffected and shall remain in full force and effect.

PASSED by the City Council and APPROVED by the Mayor this _____ of _____, 2007.

By_____
BEN TOLSON, Mayor

ATTEST:

By_____
LAURA KOENIG, City Clerk

Approved as to form:

By_____
THOM H. GRAAFSTRA, City Attorney

Published: