



CITY OF KIRKLAND
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MEMORANDUM

To: Kurt Triplett, City Manager

From: Tracey Dunlap, Deputy City Manager

Date: July 8, 2021

Subject: TRANSPORTATION IMPACT FEE POLICY DISCUSSION AND SCHOOL IMPACT FEE INTRODUCTION

RECOMMENDATION:

City Council continues the policy discussion of Transportation Impact Fees that began on April 6, 2021 and provides staff direction to allow an ordinance to be drafted for Council consideration at the August 4 meeting. In addition, information provided by Lake Washington School District is included in anticipation of a discussion of school impact fees this fall. No action is requested on July 20.

BACKGROUND DISCUSSION:

Transportation Impact Fees

Council received a briefing on the draft results of the Transportation Impact Fee study at the April 6, 2021 City Council meeting. The final rate study report prepared by the City's consultant FCS Group is included as Attachment 1 and contains the underlying calculations for the proposed maximum amount for the Transportation Impact Fee.

As a reminder, in 2015 as part of the Kirkland 2035 efforts, staff updated the Transportation impact fees charged to new development, which incorporated the updated Comprehensive plan and related master plans. That study resulted in significant changes in the approach used in setting those fees. Specifically, given the multimodal nature of the Transportation Master Plan (TMP), a wider variety of transportation improvements were included in the calculation of Transportation impact fees and the fees were based on person trips rather than vehicle trips.

A new rate study was commissioned in 2020 and staff selected FCS Group through a competitive procurement, which included an update of the existing transportation impact fee methodology to develop a transportation impact fee study that reflected updated projects and costs since 2015 update.

The results of the Transportation Impact Fee rate study are summarized in the table that follows for single family and multifamily.

	Current	Calculated
Fee per Person-Trip	\$4,061	\$5,398
Single-Family	\$5,888	\$7,827
Multifamily	\$3,357	\$4,172

Non-residential fees are based on the fee per person-trip as discussed further below.

The table below shows the calculated single-family fee compared those of some neighboring jurisdictions.

City	per SFR
Sammamish	\$ 14,204
Renton	10,862
Issaquah	9,173
Kirkland (calculated maximum)	7,827
Redmond	7,729
Shoreline	7,112
Bellevue	7,060
Kirkland (existing)	5,888

Staff seeks policy guidance from the Council on the following issue to inform the next steps:

- Should the Transportation Impact Fees be changed based on the study results?
Staff Recommendation: Yes. The calculated amounts reflect the current estimated transportation project costs. Implement the proposed increases over a three-year period similar to the park impact fees with Year 1 implementation on 1/1/22. The Appendix shows the fee structure phased in over three years for residential and non-residential development, but the residential fees are also highlighted in the table below.

Phase-In Schedule

	Current	Year 1	Year 2	Year 3
Fee per Person-Trip	\$4,061	\$4,507	\$4,952	\$5,398
Single-Family	\$5,888	\$6,534	\$7,181	\$7,827
Multifamily	\$3,357	\$3,629	\$3,900	\$4,172

- Alternatively, rather than phasing, the Council could choose to implement the entire increase on 1/1/22. Considerations for full implementation are that the fee increases are less than the park fee changes, substantial commercial and multifamily development is pending, and Kirkland remains in the middle tier of transportation impact fee totals.

The list of nonresidential fees is extensive and is based on the fee per person-trip. Each land use type generates a different number of trip ends, based on data from the Institute of Transportation Engineers Trip Generation Manual (10th edition), adjusted to approximate person rather than vehicle trips. Unlike the previous study, the factors do not include an adjustment for trip length by land use. Available empirical data on average trip lengths is not sufficient to incorporate into the analysis at this time. This results in the fees for some land uses decreasing, while others are increasing more than the per-trip increase. The calculated fees are shown in the Appendix at the end of the study report.

The City will also be updating its Comprehensive plan and the related master plans in 2022-2023. This update will extend the planning horizon to 2043, will recognize growth to date and revised growth targets, and will identify needed infrastructure to serve that growth. Once that information is available, staff recommends updating all impact fees to reflect the revised plans.

Note that the current transportation impact fee code (KMC 27.04.050) provides for an 80% exemption for the construction or creation of low-income housing as allowed under RCW 82.02.060 (3). If the Council prefers exemptions greater than 80%, the additional amount would need to be paid from other City funds or a change in State law would be necessary.

Based on Council feedback on July 20, staff will prepare a draft ordinance to implement the recommendations for Council consideration at the August 4.

School Impact Fees

In the fall, staff will bring an ordinance to Council for consideration to adjust school impact fees for 2022, consistent with past practice. The Lake Washington School District (District) recently prepared its annual Capital Facilities Plan (CFP), which includes an analysis of the portion of the District's capital expenses that may be offset by revenues from school impact fees. Impact fees are not collected directly by the District, but by cities within the District, pursuant to interlocal agreements with each city. The methodology established by the District reduces the actual fee to 50 percent of the potential fee. The fees are only applicable to new dwelling units that do not replace existing units. In the new 202-2025 CFP, the District is anticipating a 9% increase in student population from 2021-2026 with growth at all grade levels.

The District is requesting that the City collect the following school impact fees in 2022:

- New single-family units: \$18,997 (\$3,927 increase over 2021, or 7.9%)
- New multi-family units: \$3,927 (\$809 increase over 2021, or 6.9%)

The City has the discretion to implement all, some, or none of the proposed fee increase. The City has traditionally fully implemented the school district's requested amount.

Attachment 2 includes the District's request and the Capital Facilities Plan, an explanation of the rate changes, and additional comparative information. The increases are primarily due to updated construction and site acquisition costs. The City's impact fee collection includes an existing \$65 administrative fee, added by the City, for each project that must pay the impact fee. This information is provided as background in advance of consideration of the increase by the City Council in the fall; no formal presentation on school impact fees is planned for July 20.

City of Kirkland, WA

TRANSPORTATION IMPACT FEE UPDATE

Final Report
July 2021

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FCS GROUP
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Section I. INTRODUCTION

The City of Kirkland, Washington (City) is a growing city with increasing demands for transportation infrastructure. To help offset the costs that these demands place upon the City, the City imposes a transportation impact fee on new development in the City. This fee is intended to recover an equitable share of system costs from growth, recognizing both the investments in infrastructure that the City has made and the future investments that the City will have to make to provide capacity to serve growth. The transportation impact fee (TIF) was last studied in 2015, and the City Council adopted transportation impact fees based on that study, which became effective in 2016. The fees have been indexed to inflation over the intervening time period and have thus increased every year. In 2020, the City contracted with FCS GROUP to update the fee. The City has not completed a new transportation master plan since the previous study, so this update relies on the same project list and trip assumptions as the previous study. Once a new transportation master plan is available, the transportation impact fees should be updated. In addition, the City requested an initial impact fee for its fire and emergency medical services, and an update to its park impact fees. These are included in a separate report.

Consistent with these objectives, this study included the following key elements:

- **Overview of Washington Laws and Methodology Alternatives.** We worked with City staff to examine previous impact fee methodologies and evaluate alternative approaches in compliance with Washington law.
- **Develop Policy Framework.** We worked with City staff to identify, analyze, and agree on key policy issues and direction.
- **Technical Analysis.** In this step, we worked with City staff to resolve technical issues, isolate the recoverable portion of existing and planned facilities costs, and calculate fee alternatives. The most important technical consideration involves the identification and inclusion of planned capacity-increasing project costs.
- **Documentation and Presentation.** In this step, we presented preliminary findings to the City Council and summarized findings and recommendations in this report.

Section II. IMPACT FEE LEGAL OVERVIEW

Impact fees are enabled by state statutes, authorized by local ordinance, and constrained by the United States Constitution. Impact fees allow cities to recover some of the cost of expanding public facilities necessitated by growth. These fees allow “growth to pay for growth” in a fair and equitable manner. Impact fees have a specific definition and associated constraints in the state of Washington. Impact fees are allowed under RCW 82.02.050 through 82.02.110 and are permitted for:

- Public streets and roads
- Publicly owned parks, open space, and recreation facilities
- School facilities
- Fire protection facilities

The statute provides specific guidance on the permissible methodology for calculating impact fees. This guidance can be broken down into three major categories:

1. Eligibility Requirements. RCW 82.02.050(3) states that impact fees:

- a. Shall only be imposed for system improvements that are reasonably related to the new development;
- b. Shall not exceed a proportionate share of the costs of system improvements that are reasonably related to the new development; and;
- c. Shall only be used for system improvements that will reasonably benefit the new development.

These requirements, which exist to protect developers, ensure that impact fees are based on—and spent for—capacity that will directly or indirectly serve new development. That is why careful scrutiny is given to the included project list. Moreover, the impact fee that a developer pays must represent that particular development’s fair share of required capacity. That is why developments pay a unique fee based on land use, anticipated occupancy, and size.

Additionally, RCW 82.02.050(5) states that “Impact fees may be collected and spent only for the public facilities . . . which are addressed by the capital facilities plan element of a comprehensive land use plan.” This means that if a project is not listed in the adopted capital facilities plan element, then it is not eligible to be included in impact fee calculations.

2. Cost Basis. RCW 82.02.060(1) outlines the cost basis of impact fee calculations, stating that the basis must consider:

- a. The cost of public facilities necessitated by new development;
- b. An adjustment to the cost of the public facilities for past or future payments made or reasonably anticipated to be made by new development to pay for particular system improvements in the form of user fees, debt service payments, taxes, or other payments earmarked for or pro-ratable to the particular system improvement;

- c. The availability of other means of funding public facility improvements;
- d. The cost of existing public facilities improvements; and
- e. The methods by which public facilities improvements were financed.

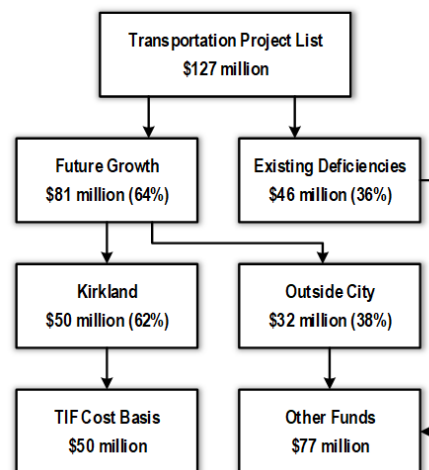
This means that adjustments to the impact fee cost basis must be made for the amount of outstanding debt used to pay for capital facility improvements, as well as other methods of funding public facilities improvements.

3. **Customer Base.** The costs determined to be eligible must be proportionately allocated across the projected customer base.

Section III. TECHNICAL ANALYSIS

FCS GROUP generally followed the same methodology as the City's previous transportation impact fee, analyzed in 2015. Thus, a good starting point is the 2015 study itself. **Exhibit 1** summarizes the derivation of the TIF cost basis. The transportation project list is allocated between projects serving future growth and addressing existing deficiencies, and then between growth inside and outside the City of Kirkland. Only costs associated with future growth within the City are eligible to be included in the impact fee cost basis.

Exhibit 1
2015 Study Methodology & Results



III.A. PROJECT LIST

The first step is to compile the transportation project list. FCS GROUP used the same project list as the previous study, with adjustments made for updated costs. For projects that have been completed, actual costs were used. Projects projected to be completed by 2026 utilized the cost shown in the City's current CIP, and projects to be completed after 2026 costs were escalated to 2021 dollars from the previous study's assumptions. This resulted in an increased transportation project list total of \$186 million, an increase of \$59 million.

The next step is to allocate each project between the portion that serves future growth within the City and the portion that addresses existing deficiencies. In order to remain consistent with estimated planning period growth, each project was allocated using the same percentages as the previous study. This resulted in \$51 million being allocated to curing existing deficiencies, and \$134 million being allocated to growth.

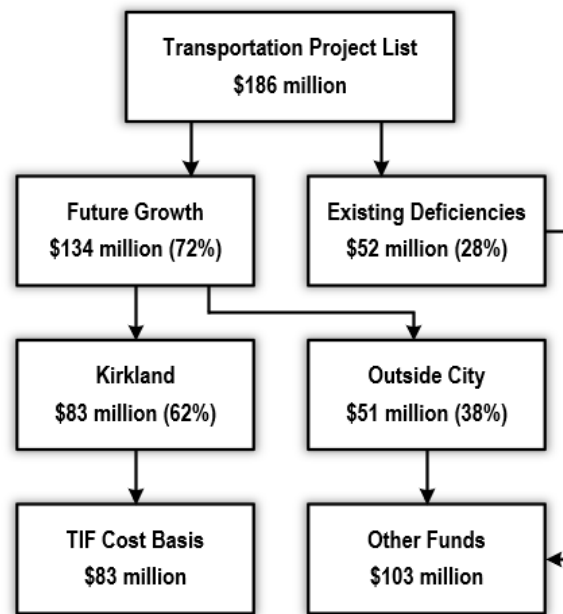
Of the costs allocated to future growth, \$52 million were allocated to growth outside of the City, with the remaining \$83 million allocated to growth inside the City. This is the transportation impact fee cost basis. The project list, with associated deficiency and inside city percentages, can be found in **Exhibit 2**.

**Exhibit 2
Project List**

TMP Project	TMP Description	2021 \$ Total	Deficiency Percentage (From Prev Study)	Costs Attributable to Growth	Percentage of Growth Within Kirkland (From Prev Study)	Growth Cost Allocated to Impact Fees
TR0096	NE 132nd St/124th Ave NE Intersect'n Imp	7,229,000	0%	7,229,000	51%	3,686,790
TR0093	NE 132nd St/Juanita H.S. Access Rd Intersect'n Imp	1,797,400	0%	1,797,400	51%	916,674
PT0002	Public Transit Speed and Reliability Improvements	633,000	75%	158,250	90%	142,425
PT0003	Public Transit Passenger Environment Improvements	633,000	75%	158,250	90%	142,425
ST0078	NE 132nd St Rdwy Imprv-Phase II (Mid Section)	400,000	0%	400,000	51%	204,000
TR0092	NE 116th St/124th Ave NE N-bound Dual Left Turn Lanes	1,284,720	0%	1,284,720	51%	655,207
TR0095	NE 132nd St/Fire Stn Access Dr Intersect'n Imp	464,000	0%	464,000	51%	236,640
TR0091	NE 124th St/124th Ave NE Intersection Imp	398,500	0%	398,500	51%	203,235
ST0077	NE 132nd St Rdwy Imprv-Phase I (West Section)	1,706,000	0%	1,706,000	51%	870,060
ST0081	Tolem Lake Area Development Opportunity Program	500,000	0%	500,000	0%	-
ST0079	NE 132nd St Rdwy Imprv-Phase III (East Section)	1,416,000	0%	1,416,000	51%	722,160
TR0097	NE 132nd St/132nd Ave NE Intersect'n Imp	1,125,000	0%	1,125,000	51%	573,750
NM0012999	Crosswalk Upgrade Program	5,188,000	0%	5,188,000	95%	4,928,600
TR0125	Kirkland ITS Implementation Phase 4	3,316,000	0%	3,316,000	57%	1,890,120
NM8888100	On-street Bicycle Network	5,568,000	75%	1,392,000	80%	1,113,600
NM0090100	Juanita Drive Bicycle and Pedestrian Improvements	13,476,000	75%	3,369,000	55%	1,852,950
ST0063	120th Avenue NE Roadway Improvements	5,694,000	0%	5,694,000	68%	3,871,920
TR0094	NE 132nd St/108th Avenue NE Intersect'n Imp	1,287,100	0%	1,287,100	51%	656,421
NM9999100	Sidewalk Completion Program	7,715,000	0%	7,715,000	95%	7,329,250
NM0086003	CKC Roadway Crossings	4,265,000	75%	1,066,250	80%	853,000
ST0072	NE 120th Street Roadway Improvements (West Section)	19,968,000	0%	19,968,000	59%	11,781,120
NM0012001	NE 116th St Crosswalk	430,000	0%	430,000	95%	408,500
NM0012002	NE 124th St Crosswalk	370,000	0%	370,000	95%	351,500
NM0012003	132nd Ave NE Crosswalk	250,000	0%	250,000	95%	237,500
NM0087001	N. Kirkland / JFK School	1,002,000	0%	1,002,000	95%	951,900
NM0090	Juanita Drive Quick-Wins	1,930,310	0%	1,930,310	55%	1,061,671
NM0090001	Juanita Drive Multi-Modal	536,000	0%	536,000	55%	294,800
NM0113001	Citywide Greenways Project 75th St	504,059	75%	126,015	90%	113,413
NM0113002	Citywide Greenways Project 128th St	1,284,241	75%	321,060	90%	288,954
NM0115	CKC Emergent Projects Opportunity Fund	405,000	75%	101,250	80%	81,000
ST0083101	100th Ave NE Design	3,249,700	0%	3,249,700	52%	1,689,844
ST0083102	100th Ave NE Construction	17,318,601	0%	17,318,601	52%	9,005,673
TR0122	Tolem Lake Intersection Improvements	6,000,000	0%	6,000,000	51%	3,060,000
NM0086001	NE 124th St/ 124th Ave Ne Bridge Design	-	0%	-	51%	-
TR0098	NE 132nd St/116th Way NE (I-405) Intersect'n Imp	502,125	0%	502,125	51%	256,084
ST0059	124th Ave NE Roadway Improvements (North Section)	11,616,700	0%	11,616,700	51%	5,924,517
NM0089	Lake Front Ped/Bike Improvements	1,552,118	75%	388,029	80%	310,424
NM0095	124th Ave Sidewalk	2,489,895	0%	2,489,895	95%	2,365,400
ST0089	Juanita Drive Auto Improvements	8,732,200	0%	8,732,200	55%	4,802,710
NM0086002	NE 124th St/ 124th Ave Ne Bridge Construction	22,361,517	75%	5,590,379	51%	2,851,093
NM0006100	Street Levy Safe School Walk Routes	3,000,000	75%	750,000	95%	712,500
NM0007 (NMC0070)	Cross Kirkland Corridor Connection - NE 52nd Street Sidewalk	1,119,878	75%	279,969	80%	223,976
NM0012	Crosswalk Upgrade Program	70,274	75%	17,568	95%	16,690
NM0087	Citywide School Walk Route Enhancements	3,975,989	75%	993,997	95%	944,297
NM0098	Kirkland Way Sidewalk	2,683,000	75%	670,750	95%	637,213
NM0113	Citywide Greenways Networks	2,400,000	75%	600,000	90%	540,000
TR0079001	NE 85th St/114th Ave Intersection Phase 2	-	-	-	-	-
TR0082	Central Way/Park Place Traffic Signal	-	-	-	-	-
TR0099	120th Ave/Tolem Lake Way Intersection	-	-	-	-	-
TR0100100	6th St/Central Way Intersection Phase 2	-	-	-	-	-
TR0103	Central Way/4th St Intersection	-	-	-	-	-
TR0104	6th St/4th St Intersection	-	-	-	-	-
TR0105	Central Way/5th St Intersection	-	-	-	-	-
TR0109	Tolem Lake Plaza/Tolem Lake Blvd Intersection Improvements	-	-	-	-	-
TR0110	Tolem Lake Plaza/120th Ave NE Intersection	-	-	-	-	-
TR0120	Kirkland Intelligent Transportation System Phase 3	3,200,000	0%	3,200,000	57%	1,824,000
NM0113999	Citywide Greenway Network	4,650,000	75%	1,162,500	90%	1,046,250
Total		\$ 185,697,327		\$ 134,261,520		\$ 82,630,255

Some projects are not included in the cost calculation, and thus show at zero cost in the table, because they are funded by developers or outside parties. The summarized cost basis calculation is shown in **Exhibit 3**.

Exhibit 3 Updated Study Methodology & Results



As can be seen, the total TIF cost basis increased by \$33 million, compared to an overall project cost list increase of \$59 million. Thus, slightly more than half of the projected cost increases ultimately flow-through to the TIF cost basis of \$83 million.

III.B. ADJUSTMENTS

The City's existing transportation impact fee fund balance (\$1.7 million) was deducted from the TIF cost basis to account for the City's existing resources to fund the project list. This resulted in a final adjusted cost basis of \$81 million.

III.C. TRIP-ENDS

The adjusted cost basis is then divided by growth in the number of person trip-ends. Specifically, it is based on growth in the number of PM peak-hour person trip ends, which represents the maximum period of constraint on the City's transportation infrastructure. As noted previously, this update uses the same number as the 2015 study, 15,000.

III.D. FEE PER TRIP-END

The fee calculation is summarized in **Exhibit 4**.

Exhibit 4		
Fee Calculation		
Eligible Cost Basis	\$	82,630,255
<i>less: Existing TIF fund balance</i>		<i>(1,660,800)</i>
Net Allocable Growth Cost	\$	80,969,455
New PM Peak-Hour Person Trip Er		15,000
Cost per New Person Trip End	\$	5,398

This results in a new cost per PM Peak-Hour Person Trip End of \$5,398, an increase of \$2,056 from the 2015 study result of \$3,342.

III.E. FEE SCHEDULE

The final step is to convert the cost per trip end into a fee for various land-use types. Each land use type generates a different number of trip ends. FCS GROUP uses data from the *Institute of Transportation Engineers Trip Generation Manual* (10th edition), adjusted to approximate person rather than vehicle trips. By multiplying the number of person trip ends for each land use by the cost calculated in **Exhibit 5**, a fee schedule can be calculated, as shown in **Exhibit 5**. It is important to note that the PM Peak Hour Person Trip factors shown in **Exhibit 5** also reflect a reduction for pass-by trips for certain land uses. Unlike the previous study, the factors do not include an adjustment for trip length by land use. Available empirical data on average trip lengths is not sufficient to incorporate into the analysis at this time.

**Exhibit 5a
Fee Schedule**

Land Use Category	ITE Code	Unit of Measurement	PM Peak Hour Person Trip Ends	Impact Fee
General Light Industrial	110	1,000 SFGFA	0.92	\$ 4,981
Industrial Park	130	1,000 SFGFA	0.59	3,163
Manufacturing	140	1,000 SFGFA	0.98	5,297
Mini-Warehouse	151	1,000 SFGFA	0.25	1,344
Single-Family Detached Housing	210	Dwelling Units	1.45	7,827
Multifamily Housing (Low-Rise)	220	Dwelling Units	0.77	4,172
Residential Suite	231	Dwelling Units	0.50	2,682
Mobile Home Park	240	Dwelling Units	0.67	3,637
Senior Adult Housing - Detached	251	Dwelling Units	0.44	2,372
Senior Adult Housing - Attached	252	Dwelling Units	0.38	2,056
Congregate Care Facility	253	Dwelling Units	0.38	2,050
Assisted Living	254	1,000 SFGFA	0.70	3,795
Hotel	310	Rooms	2.26	12,210
Motel	320	Rooms	0.56	3,004
Multiplex Movie Theater	445	Movie Screens	20.11	108,557
Health/Fitness Club	492	1,000 SFGFA	5.31	28,679
Middle School/Junior High School	522	1,000 SFGFA	1.74	9,409
High School	530	1,000 SFGFA	3.00	16,179
Church	560	1,000 SFGFA	1.48	7,988
Day Care Center	565	1,000 SFGFA	7.49	40,444
Library	590	1,000 SFGFA	11.95	64,518
Hospital	610	1,000 SFGFA	1.50	8,116
Nursing Home	620	1,000 SFGFA	0.74	4,013
General Office Building	710	1,000 SFGFA	1.86	10,056
Medical-Dental Office Building	720	1,000 SFGFA	3.98	21,478
United States Post Office	732	1,000 SFGFA	16.42	88,633
Office Park	750	1,000 SFGFA	3.33	17,963
Research and Development Center	760	1,000 SFGFA	0.58	3,121
Business Park	770	1,000 SFGFA	0.62	3,321

Exhibit 5b
Fee Schedule Continued

Land Use Category	ITE Code	Unit of Measurement	PM Peak Hour Person Trip Ends	Impact Fee
Building Materials and Lumber Store	812	1,000 SFGFA	3.02	16,288
Variety Store	814	1,000 SFGFA	6.61	35,693
Free-Standing Discount Store	815	1,000 SFGFA	5.74	30,970
Hardware/Paint Store	816	1,000 SFGFA	2.92	15,786
Nursery (Garden Center)	817	1,000 SFGFA	10.17	54,872
Shopping Center	820	1,000 SFGLA	4.86	26,223
Automobile Sales (Used)	841	1,000 SFGFA	5.49	29,650
Automobile Parts Sales	843	1,000 SFGFA	4.10	22,128
Tire Store	848	1,000 SFGFA	4.18	22,552
Supermarket	850	1,000 SFGFA	9.45	51,019
Convenience Market	851	1,000 SFGFA	32.49	175,360
Discount Supermarket	854	1,000 SFGFA	9.72	52,485
Discount Club	857	1,000 SFGFA	5.69	30,702
Home Improvement Superstore	862	1,000 SFGFA	2.31	12,493
Electronic Superstore	863	1,000 SFGFA	3.74	20,209
Pharmacy/Drugstore without Drive-Through Window	880	1,000 SFGFA	17.79	96,038
Pharmacy/Drugstore with Drive-Through Window	881	1,000 SFGFA	7.74	41,764
Furniture Store	890	1,000 SFGFA	0.30	1,637
Walk-in Bank	911	1,000 SFGFA	16.25	87,740
Drive-in Bank	912	1,000 SFGFA	20.04	108,162
Drinking Place	925	1,000 SFGFA	16.64	89,819
Quality Restaurant	931	1,000 SFGFA	8.00	43,190
High-Turnover (Sit-Down) Restaurant	932	1,000 SFGFA	6.51	35,125
Fast-Food Restaurant without Drive-Through Window	933	1,000 SFGFA	32.31	174,395
Fast-Food Restaurant with Drive-Through Window	934	1,000 SFGFA	26.67	143,966
Coffee/Donut Shop without Drive-Through Window	936	1,000 SFGFA	53.18	287,087
Coffee/Donut Shop with Drive-Through Window	937	1,000 SFGFA	65.33	352,633
Quick Lubrication Vehicle Shop	941	1,000 SFGFA	12.74	68,787
Automobile Parts and Service Center	943	1,000 SFGFA	3.31	17,869
Gasoline/Service Station	944	Fueling Positions	9.77	52,756
Self-Service Car Wash	947	Wash Stalls	8.11	43,802

III.F. REGIONAL COMPARISON

FCS GROUP conducted a regional comparison to determine how the proposed fees would compare to select jurisdictions in Western Washington. The results of this comparison are shown in **Exhibit 6**.

Exhibit 6
Regional Comparison

City	per SFR
Sammamish	\$ 14,204
Renton	10,862
Issaquah	9,173
Kirkland (calculated maximum)	7,827
Redmond	7,729
Shoreline	7,112
Bellevue	7,060
Kirkland (existing)	5,888

Section IV. IMPLEMENTATION

There are several issues related to the implementation of the updated TIFs, described below.

IV.A. FUNDING PLAN

The fees calculated in this report represent the maximum amounts that the City can legally charge. However, even if the City imposes the full calculated fee, impact fees alone will not be sufficient to complete the project list, as indicated by the funding plan below. The City will need to identify other funding sources to carry out the program, including Real Estate Excise Tax, other City tax and fee revenues, and grants.

Exhibit 7
Funding Plan

Total Costs to be Funded	\$	185,697,327
less: Impact Fee Revenue		(80,969,455)
less: Existing Fund Balance		(1,660,800)
Remainder to be Funded	\$	103,067,071

IV.B. INDEXING

The City already annually indexes its impact fees to the *Engineering News-Record* Construction Cost Index. We recommend that the City continue this practice for its transportation impact fee, as it provides an adjustment which at least partially responds to the cost basis over time. We also recommend that the City continue its practice of periodically updating its impact fees to ensure that they recover the full cost of growth's impacts on City facilities. Specifically, we recommend that the City update its TIFs in conjunction with its new transportation master plan.

IV.C. PHASE-IN

Due to the large increase in the calculated impact fees, City staff suggested the adoption of a 3-year phase-in approach, where TIFs would not reach the calculated maximum until the third year after the adoption of this study. A proposed phase-in schedule from the current fee per person trip end to the calculated fee per person trip end is provided in **Exhibit 8**, along with the phase-in schedule for single-family and multifamily dwellings.

Exhibit 8
Phase-In Schedule

	Current	Year 1	Year 2	Year 3
Fee per Person-Trip	\$4,061	\$4,507	\$4,952	\$5,398
Single-Family	\$5,888	\$6,534	\$7,181	\$7,827
Multifamily	\$3,357	\$3,629	\$3,900	\$4,172

In addition, phase-in schedules for two sample multi-use projects are shown in **Exhibit 9**. The first, “South Tower”, consists of 266,054 sq. ft. of office space, 12,335 sq. ft. of retail/shopping, and an 8-screen movie theater. The second, “MRM Building”, consists of 171 multi-family dwelling units, as well as a 19,795 sq. ft. supermarket. The cost of each is shown below.

Exhibit 9a
Phase-In Schedule (South Tower)

	Office	Retail/Shopping	Movie Theater	Total
Unit	266,054 Sq. Ft.	12,335 Sq. Ft.	8 Screens	n/a
Current Rate	\$9.36	\$5.80	\$37,745.00	n/a
Current Fee	\$2,490,265.44	\$71,543.00	\$301,960.00	\$2,863,768.44
Year 1 Rate	\$9.59	\$12.61	\$61,349.02	n/a
Year 2 Rate	\$9.82	\$19.42	\$84,953.05	n/a
Year 3 Rate	\$10.06	\$26.22	\$108,557.07	n/a
Year 1 Fee	\$2,555,026.00	\$155,515.86	\$490,792.18	\$3,198,334.04
Year 2 Fee	\$2,613,786.57	\$239,488.71	\$679,624.37	\$3,532,899.65
Year 3 Fee	\$2,675,547.13	\$323,461.57	\$868,457.55	\$3,867,465.25

Exhibit 9b
Phase-In Schedule (MRM Building)

	Residential	Supermarket	Subtotal	less: Credits	Total
Unit	171 Dwelling Units	19,795 Sq. Ft.	n/a	n/a	n/a
Current Rate	\$3,357.00	\$18.03	n/a	n/a	n/a
Current Fee	\$577,125.00	\$356,903.85	\$934,028.85	(\$198,974.88)	\$735,053.97
Year 1 Rate	\$3,628.67	\$29.03	n/a	n/a	n/a
Year 2 Rate	\$3,900.33	\$40.02	n/a	n/a	n/a
Year 3 Rate	\$4,172.00	\$51.02	n/a	n/a	n/a
Year 1 Fee	\$620,502.00	\$574,578.72	\$1,195,080.72	(\$198,974.88)	\$996,105.84
Year 2 Fee	\$666,957.00	\$792,253.60	\$1,459,210.60	(\$198,974.88)	\$1,260,235.72
Year 3 Fee	\$713,412.00	\$1,009,928.47	\$1,723,340.47	(\$198,974.88)	\$1,524,365.59

APPENDIX: FEE PHASE-IN SCHEDULE

This appendix contains the full transportation impact fee schedule, with the phase-in for years 1, 2, and 3. Some land use codes did not have current transportation impact fees listed in the City's 2021 impact fee schedule, or the unit of measurement was different than ITE's *10th Generation Trip Manual*. In those cases, the base fee to begin the phase-in was imputed based on the 2021 fee per trip-end of \$4,060.66.

Exhibit A-1 Transportation Impact Fee Phase-In Schedule

Land Use Category	ITE Code	Unit of Measurement	Current Fee (w/imputed fee)	Year 1	Year 2	Year 3 (Full Impact Fee)
General Light Industrial	110	1,000 SFGFA	\$ 6,820	\$ 6,207	\$ 5,594	\$ 4,981
Industrial Park	130	1,000 SFGFA	5,980	5,041	4,102	3,163
Manufacturing	140	1,000 SFGFA	3,985	4,422	4,860	5,297
Mini-Warehouse	151	1,000 SFGFA	2,250	1,948	1,646	1,344
Single-Family Detached Housing	210	Dwelling Units	5,888	6,534	7,181	7,827
Multifamily Housing (Low-Rise)	220	Dwelling Units	3,357	3,629	3,900	4,172
Mobile Home Park	240	Dwelling Units	2,736	3,036	3,337	3,637
Senior Adult Housing - Detached	251	Dwelling Units	1,784	1,980	2,176	2,372
Senior Adult Housing - Attached	252	Dwelling Units	1,546	1,716	1,886	2,056
Congregate Care Facility	253	Dwelling Units	674	1,133	1,591	2,050
Assisted Living	254	1,000 SFGFA	2,855	3,168	3,482	3,795
Hotel	310	Rooms	4,037	6,761	9,486	12,210
Motel	320	Rooms	4,037	3,693	3,349	3,004
Multiplex Movie Theater	445	Movie Screens	37,745	61,349	84,953	108,557
Health/Fitness Club	492	1,000 SFGFA	11,620	17,306	22,993	28,679
Middle School/Junior High School	522	1,000 SFGFA	7,078	7,855	8,632	9,409
High School	530	1,000 SFGFA	12,171	13,507	14,843	16,179
Church	560	1,000 SFGFA	2,880	4,583	6,285	7,988
Day Care Center	565	1,000 SFGFA	30,424	33,764	37,104	40,444
Library	590	1,000 SFGFA	13,170	30,286	47,402	64,518
Hospital	610	1,000 SFGFA	5,270	6,219	7,167	8,116
Nursing Home	620	1,000 SFGFA	3,019	3,350	3,681	4,013
General Office Building	710	1,000 SFGFA	9,360	9,592	9,824	10,056
Medical-Dental Office Building	720	1,000 SFGFA	17,590	18,886	20,182	21,478
United States Post Office	732	1,000 SFGFA	20,250	43,044	65,838	88,633
Office Park	750	1,000 SFGFA	13,513	14,996	16,479	17,963
Research and Development Center	760	1,000 SFGFA	2,348	2,606	2,863	3,121
Business Park	770	1,000 SFGFA	2,498	2,772	3,047	3,321

Exhibit A-2
Transportation Impact Fee Phase-In Schedule

Land Use Category	ITE Code	Unit of Measurement	Current Fee (w/imputed fee)	Year 1	Year 2	Year 3 (Full Impact Fee)
Building Materials and Lumber Store	812	1,000 SFGFA	12,252	13,597	14,942	16,288
Variety Store	814	1,000 SFGFA	26,851	29,798	32,746	35,693
Free-Standing Discount Store	815	1,000 SFGFA	10,810	17,530	24,250	30,970
Hardware/Paint Store	816	1,000 SFGFA	8,620	11,009	13,397	15,786
Nursery (Garden Center)	817	1,000 SFGFA	11,690	26,084	40,478	54,872
Shopping Center	820	1,000 SFGFA	5,800	12,608	19,415	26,223
Automobile Sales (Used)	841	1,000 SFGFA	13,650	18,983	24,316	29,650
Automobile Parts Sales	843	1,000 SFGFA	8,200	12,843	17,485	22,128
Tire Store	848	1,000 SFGFA	16,965	18,827	20,690	22,552
Supermarket	850	1,000 SFGFA	18,030	29,026	40,023	51,019
Convenience Market	851	1,000 SFGFA	47,250	89,953	132,656	175,360
Discount Supermarket	854	1,000 SFGFA	39,482	43,816	48,151	52,485
Discount Club	857	1,000 SFGFA	14,910	20,174	25,438	30,702
Home Improvement Superstore	862	1,000 SFGFA	4,020	6,844	9,669	12,493
Electronic Superstore	863	1,000 SFGFA	8,030	12,090	16,149	20,209
Pharmacy/Drugstore without Drive-Through Window	880	1,000 SFGFA	72,246	80,176	88,107	96,038
Pharmacy/Drugstore with Drive-Through Window	881	1,000 SFGFA	12,160	22,028	31,896	41,764
Furniture Store	890	1,000 SFGFA	510	886	1,262	1,637
Walk-in Bank	911	1,000 SFGFA	20,600	42,980	65,360	87,740
Drive-in Bank	912	1,000 SFGFA	33,540	58,414	83,288	108,162
Drinking Place	925	1,000 SFGFA	67,567	74,984	82,401	89,819
Quality Restaurant	931	1,000 SFGFA	20,190	27,857	35,524	43,190
High-Turnover (Sit-Down) Restaurant	932	1,000 SFGFA	27,020	29,722	32,424	35,125
Fast-Food Restaurant without Drive-Through Window	933	1,000 SFGFA	37,010	82,805	128,600	174,395
Fast-Food Restaurant with Drive-Through Window	934	1,000 SFGFA	46,200	78,789	111,377	143,966
Coffee/Donut Shop without Drive-Through Window	936	1,000 SFGFA	215,964	239,671	263,379	287,087
Coffee/Donut Shop with Drive-Through Window	937	1,000 SFGFA	265,271	294,391	323,512	352,633
Quick Lubrication Vehicle Shop	941	1,000 SFGFA	51,746	57,426	63,107	68,787
Automobile Parts and Service Center	943	1,000 SFGFA	13,442	14,918	16,393	17,869
Gasoline/Service Station	944	Fueling Positions	12,357	25,823	39,290	52,756
Self-Service Car Wash	947	Wash Stalls	8,155	20,037	31,920	43,802

From: Wheeler, Lydia <lywheeler@lwsd.org> on behalf of Buck, Brian <bbuck@lwsd.org>
Sent: Thursday, June 10, 2021 10:01 AM
Cc: Wheeler, Lydia
Subject: 2021 Capital Facilities Plan and School Impact Fees
Attachments: LWSD Board Adopted 21-26 CFP.pdf

Hello,

Attached please find Lake Washington School District's Board Adopted 2021-2026 Capital Facilities Plan ("CFP"). The District's Board of Directors adopted the CFP on June 7, 2021. The District presented the Board Adopted CFP to the King County School Technical review Committee (STRC) on June 9, 2021.

The 2021-2026 Capital Facilities Plan establishes impact fees of \$18,997 per single-family unit and \$3,510 for each multi-family unit. The single-family fee is an increase of \$3,927 and the multi-family fee is an increase of \$809 from last year's fees. These increases are primarily due to updated construction and site acquisition costs.

The District requests that the City of Kirkland begin its process to adopt the Capital Facilities Element of the City's Comprehensive Plan to reflect the CFP and to update the school impact fees charged by the City to reflect the District's updated school impact fees. Ideally, the City's new fees would be effective no later than January 1, 2022.

Please let me know if you have any questions related to the CFP and/or school impact fees. In addition, please let me know of the City's estimated timeline for updating the school impact fees.

Sincerely,

Brian Buck
Executive Director
Support Services
Lake Washington School District
bbuck@lwsd.org | 425.936.1102

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Six-Year Capital Facilities Plan

2021 – 2026



Old Redmond Schoolhouse – Opened Fall 2020

Board Adopted: June 7, 2021

Lake Washington School District #414

Serving Redmond, Kirkland, Sammamish, and King County, Washington

Lake Washington School District #414

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Dr. Jon Holmen

Lake Washington School District's Six-Year Capital Facilities Plan 2021-2026

**For information about this plan, call the District Support Services Center
(425.936.1102)**

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I. Executive Summary

This Six-Year Capital Facilities Plan (the plan) has been prepared by the Lake Washington School District (the district). It is the organization's primary facility planning document in compliance with the requirements of the State of Washington's Growth Management Act and King County Code 21A.43. It is also used as a basis for requesting the collection of school impact fees. This plan was prepared using data available in the spring of 2021.

King County was the first jurisdiction in the State of Washington to adopt a Growth Management Act school impact fee ordinance in 1991 (with fee collection first becoming effective in 1992). The King County Council adopted the ordinance, including the school impact fee formula, following a stakeholder process that included representatives from school districts and the development community. The adopted formula requires that the calculated fee be reduced by fifty percent. This discount factor was negotiated as a part of the stakeholder process. Most cities in King County (and in other areas) adopted the King County school impact fee formula, including the discount factor, in whole as a part of their school impact fee ordinances.

In order for school impact fees to be collected in the unincorporated areas of King County, the King County Council must adopt this plan. The cities of Redmond, Kirkland and Sammamish have each adopted a school impact fee policy and ordinance similar to the King County model.

Pursuant to the requirements of the Growth Management Act and the local implementing ordinances, this plan will be updated on an annual basis with any changes in the fee schedule adjusted accordingly. See *Appendix B* for the current single-family calculation and *Appendix C* for the current multi-family calculation.

The district's plan establishes a standard of service in order to ascertain current and future capacity. This plan reflects the current student/teacher standard of service ratio and service model for other special programs. Future state funding decisions could have an additional impact on class sizes and facility needs.

I. Executive Summary (*continued*)

While the State Superintendent of Public Instruction establishes square foot guidelines for funding, those guidelines do not account for the local program needs in the district. The Growth Management Act and King County Code 21A.43 authorize the district to determine a standard of service based on the district's specific needs.

The district's current standard provides the following (see *Section III* for specific information):

Grade Level	Target Teacher-Student Ratio
K-1	20 Students
2-3	23 Students
4-5	27 Students
6-8	30 Students
9-12	32 Students

School capacity is based on the district standard of service and the existing inventory of available classrooms, including both permanent and relocatable (portable) classrooms. As shown in *Appendix A1* and *A2*, the district's overall total capacity is 38,806. The total net available capacity is 33,934 including net permanent capacity of 30,138 and 3,796 in relocatables. Student headcount enrollment as of October 1, 2020 was 30,046.

The district experienced actual enrollment loss of 452 students in 2020 due to the COVID-19 pandemic. A six-year enrollment projection, as required for this plan, is shown in *Table 1*. The district expects enrollment to recover to pre-COVID levels with the return to in-person learning. During the six-year window from 2021 to 2026, enrollment is projected to increase by 3,024 students to a total of 33,672. Growth is projected at all levels.

The Lake Washington School District is the fastest growing school district in King County and one of the fastest growing school districts in the state. In the five years from 2014 to 2019, the district went from being the sixth largest school district to the second largest school district in the state. Enrollment growth has resulted in overcrowding in many district schools.

I. Executive Summary (*continued*)

In December 2014, a Long-Term Facilities Planning Task Force, comprised of community members and representatives from each of the district's schools, was convened to develop recommendations on long-term facilities planning. From December 2014 to October 2015, this Task Force and a smaller Working Subcommittee met 20 times to learn about and have detailed discussions on topics ranging from construction costs to classroom space usage to facilities funding. In November 2015, the Board of Directors accepted the recommendations of the Task Force.

The recommendations provide a 15-year framework to address growing enrollment, provide needed space to reduce class size and reduce the reliance on relocatables. The recommendations prioritize building new schools and enlarging aging schools to address capacity needs. Subsequent to the work of the Task Force, the district proposed a bond measure for April 2016. Voters approved that bond measure which includes funding for the following projects:

- Timberline Middle School, a new middle school
- Rebuilding and expanding Juanita High School
- Rebuilding and expanding Kirk Elementary School
- Rebuilding and expanding Mead Elementary School
- Remodeling Old Redmond Schoolhouse for preschool classrooms.
- Barton Elementary School, a new elementary school
- Baker Elementary School, a new elementary school
- Rebuilding Explorer Community Elementary School.

In addition, within the six-year window of this plan, the framework of the long-term plan included a bond measure proposed for 2018. The following projects were presented to District voters in February 2018:

- A new elementary school in the Lake Washington Learning Community
- An addition at Lake Washington High School
- Rebuild and enlarge Alcott Elementary School
- Rebuild and enlarge Kamiakin Middle School
- A Choice high school in Sammamish
- Property for new schools

I. Executive Summary (*continued*)

The February 2018 bond measure did not receive a sufficient majority to pass. However, the need for these projects remains. Therefore, projects are presented in this report as occurring within the six-year window of the Lake Washington School District 2021-2026 Six-Year Capital Facilities Plan on a revised timeline.

In April 2019, voters approved a six-year Capital Project Levy measure which incorporated two projects from the 2018 bond as well as additional projects needed to provide for critical capacity needs. Voters approved the Levy measure which included funding for the following projects:

- A 20-classroom addition to Lake Washington High School
- An eight-classroom addition to Franklin Elementary School
- An eight-classroom addition to Rose Hill Elementary School
- A four-classroom addition to Twain Elementary School
- A four-classroom addition to Carson Elementary School
- Given that the Long-Term Facilities Planning Task Force recommendations were based on assumptions from 2014 and enrollment and growth patterns continue to change, the district formed a new Facilities Advisory Committee (FAC) in November 2019 to review and update the 2014 Task Force Recommendations. The FAC made recommendations for future facility planning informed by enrollment trends, community expectations and district programs. The facility strategy aligned with the district's strategic plan and made recommendations to accommodate our rapid enrollment growth and to continue providing quality learning environments. In January 2021, the FAC provided its recommendations to the board. These recommendations include the following projects to increase permanent capacity by approximately 4,600 through 2030:
 - Rebuild or expand Kamiakin Middle School
 - Rebuild and enlarge Alcott Elementary School
 - A new Choice high school in Redmond/Eastlake Area
 - A new Elementary school in the Lake Washington Area
 - Build Elementary Capacity in the Redmond Area
 - Refurbish Juanita High School Field House/Pool
 - Rebuild or expand Evergreen Middle School
 - Rebuild and enlarge Smith Elementary school

I. Executive Summary (*continued*)

- Rebuild and enlarge Rockwell Elementary school
- A new Choice high school in Lake Washington Area
- An addition of 8 classrooms at Kirkland Middle School
- A potential addition of 14 classrooms at Redmond High School
- New Early Learning Centers in Juanita and Lake Washington Areas

The Superintendent and School Board will consider these recommendations while planning for future ballot measures to fund construction.

The finance plan shown on *Table 6* demonstrates how the Lake Washington School District plans to finance improvements for the years 2021 through 2026. The financing components include secured and unsecured funding.

II. Six-Year Enrollment Projection and Long-Term Planning

Six-Year Enrollment Projection

The district developed long-term enrollment projections to assess facility capacity needs. Based on these projections the district expects enrollment to increase by over 3,024 students from the 2021 school year through 2026.

The district experienced actual enrollment loss of 452 students in 2020 due to the COVID-19 pandemic. A six-year enrollment projection, as required for this plan, is shown in *Table 1*. The district expects enrollment to recover to pre-COVID levels with the return to in-person learning. During the six-year window from 2021 to 2026, enrollment is projected to increase by 3,024 students resulting in a 9.9% increase over the current student population. Growth is expected to impact all levels.

Student enrollment projections have been developed using two methods: (1) *cohort survival* – which applies historical enrollment trends to the classes of existing students progressing through the system; and (2) *development tracking* – which projects students anticipated from new development. The cohort survival method was used to determine base enrollments. Development tracking uses information on known and anticipated housing development. This method allows the district to more accurately project student enrollment resulting of new development by school attendance area.

Cohort Survival

King County live birth data is used to predict future kindergarten enrollment. Actual King County live births through 2019 are used to project kindergarten enrollment through the 2024-2025 school year. After 2025, the number of live births is based on King County projections. Historical data is used to estimate the future number of kindergarten students that will generate from county births. For other grade levels, cohort survival trends compare students in a particular grade in one year to the same group of students in prior years. From this analysis a cohort survival trend is determined. This trend shows if the cohort of students is increasing or decreasing in size. This historical trend can then be applied to predict future enrollment.

II. Six-Year Enrollment Projection and Long-Term Planning
(continued)

Development Tracking

In order to ensure the accuracy and validity of enrollment projections, a major emphasis has been placed on the collection and tracking of data of 110 known new housing developments within the district. This information is obtained from the cities and county and provides the foundation for a database of known future developments, as well as city and county housing growth targets. This assures the district's plan is consistent with the comprehensive plans of the local permitting jurisdictions. Contact is made with each developer annually to determine the number of homes to be built and the anticipated development schedule.

Student Generation Rates

Developments built within the district that are near completion, or have been completed, within the last five years are typically used to forecast the number of students generated by new development. The district updates these figures in each plan update. However, for purposes of this 2021 update, the district is choosing to continue to use the 2020 student generation rate data given that remote learning and COVID-related enrollment disruption likely presents an inaccurate data set of the students generated from recent new development. The 2020 district wide statistics show that each new single-family home currently generates a 0.370 elementary student, 0.153 middle school student, and 0.147 senior high student, for a total of 0.670 school-age child per single family home (see *Appendix B*). New multi-family housing units currently generate an average of 0.082 elementary student, 0.035 middle school student, and 0.033 senior high student for a total of 0.151 school age child per multi-family home (see *Appendix C*). These student generation factors (see *Appendix D*) are used to forecast the number of students expected from the new developments that are planned over the next six years.

II. Six-Year Enrollment Projection and Long-Term Planning
(continued)

Enrollment Projection Scenarios

The district works with Flo Analytics, an outside planning, GIS and data analytic consulting firm, to review enrollment trends and demographics, provide land use and development mapping and to prepare 10-year enrollment forecast. Flo Analytics 6-year enrollment projections along with a 10-year high, medium, and low projection are shown in *Table 1* and *Table 1A*.

III. Current District “Standard of Service”

King County Code 21A.06 refers to a “standard of service” that each school district must establish in order to ascertain its overall capacity. The standard of service identifies the program year, the class size, the number of classrooms, students and programs of special need, and other factors determined by the district, which would best serve the student population. Relocatables (i.e. portable classroom units) may be included in the capacity calculation using the same standards of service as permanent facilities.

The standard of service outlined below reflects only those programs and educational opportunities provided to students that directly affect the capacity of the school buildings. The special programs listed below require classroom space and as a result reduce the total permanent capacity of the buildings that house them. Newer buildings have been constructed to accommodate some of these programs. Older buildings require additional reduction of capacity to accommodate these programs. At both the elementary and secondary levels, the district considers the ability of students to attend neighborhood schools to be a component of the standard of service.

The district’s standard of service, for capital planning purposes, and the projects identified in this plan, include space needed to serve students in All Day Kindergarten. Beginning in the 2016-2017 school year, the State funded All Day Kindergarten for all students.

Standard of Service for Elementary Students

School capacity at elementary schools is calculated on an average class size in grades K-5 of 23; based on the following student/teacher staffing ratios:

- Grades K - 1 @ 20:1
- Grades 2 - 3 @ 23:1
- Grades 4 - 5 @ 27:1

III. Current District “Standard of Service” (*continued*)

The elementary standard of service includes spaces to accommodate:

- Special Education for students with disabilities which may be served in a self-contained classroom
- Music instruction provided in a separate classroom
- Art/Science rooms in modernized schools
- Resource rooms to serve students in:
 - Safety Net / Remedial programs
 - Special Education programs
 - English Language Learners (ELL)
- Gifted education (pull-out Quest programs)
- Special Education, Head Start and Ready Start Preschool

Standard of Service for Secondary Students

School capacity at secondary school is based on the following class size provisions:

- Class size for grades 6-8 should not exceed 30 students
- Class size for grades 9-12 should not exceed 32 students

In the secondary standard of service model:

- Special Education for students with disabilities may be provided in a self-contained classroom

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

- Resource rooms
- English Language Learners (ELL)

Room Utilization at Secondary Schools

It is not possible to achieve 100% utilization of regular teaching stations at secondary schools due to scheduling conflicts for student programs, the

III. Current District “Standard of Service” (*continued*)

need for specialized rooms for certain programs, and the need for teachers to have a workspace during their planning periods.

The district has determined a standard utilization rate of 70% for non-rebuilt secondary schools. For secondary schools that have been rebuilt, rebuilt and enlarged, or have been remodeled to accommodate teacher planning spaces, the standard utilization rate is 83%.

IV. Inventory and Evaluation of Current Facilities

As of May 2020, the district has total classrooms of 1,610, including 1,448 permanent classrooms and 162 relocatable classrooms (see *Appendix A-1*). These classrooms represent a theoretical capacity to serve 38,806 if all classrooms were only used as general classroom spaces. However, the district's standard of service provides for the use of classrooms for special programs, such as Special Education, English Language Learners and Safety Net programs. These programs serve students at much lower student to teacher ratios than general education classrooms or serve the same students for a portion of the day when they are pulled out of the regular classroom.

As a result, the net capacity of these school buildings is adjusted. A total of 226 classroom spaces are used for special programs as shown in *Appendix A-2*. The remaining classrooms establish the net available capacity for general education purposes and represent the district's ability to house projected student enrollment based on the Standard of Service defined in *Section III, Current District Standard of Service*.

After providing space for special programs the district has a net available classroom capacity to serve 33,934 students. This includes 3,796 in relocatable (portable) capacity and 30,138 in permanent capacity of which 432 is for self-contained program capacity.

Enrollment in 2020 was 30,648 and is expected to increase to 33,672 in 2026 (see *Table 1*).

The physical condition of the district's facilities is documented in the 2021 State Study and Survey of School Facilities completed in accordance with WAC 392-341-025. As schools are modernized or replaced, the survey of school facilities is updated. That report is incorporated herein by reference.

V. Six-Year Planning and Construction Plan

Enrollment projections show that enrollment will increase at all grade spans. Based on the enrollment projections contained in *Table 5*, student enrollment is anticipated to reach 33,672 by 2026. The district current inventory of existing net permanent capacity is 30,138.

To address existing and future capacity needs, the district contemplates using the following strategies:

- Construction of new schools
- Additions for existing schools
- Rebuilding and enlarging existing schools
- Use of relocatables as needed
- Boundary adjustments

Construction of new capacity in one area of the district could indirectly create available capacity at existing schools in other areas of the district through area specific boundary adjustments.

Strategies to address capacity needs employed over the prior six-year planning timeline (2015-2020) included:

Boundary Adjustments

- Effective in Fall 2015, district-wide boundary adjustments were implemented and a temporary boundary adjustment was conducted for Einstein and Rockwell Elementary due to overcrowding to move unoccupied new developments from those schools to Mann Elementary
- Effective in Fall 2018 boundary adjustments in the Redmond area were implemented to accommodate the opening of two new elementary schools.

V. Six-Year Planning and Construction Plan (*continued*)**Use of Relocatables**

Relocatables were added at various locations to accommodate growth and help relieve capacity issues:

School	Year Installed	Location	Number
Lake Washington HS	2015	Kirkland	6
Redmond ES	2015	Redmond	4
Alcott ES	2015	King County	3
Rush ES	2015	Redmond	3
Evergreen MS	2015	King County	2
Audubon ES	2015	Redmond	1
Franklin ES	2015	Kirkland	1
Frost ES	2015	Kirkland	1
Redmond MS	2015	Redmond	1
Lake Washington HS	2016	Kirkland	4
Evergreen MS	2016	King County	2
Alcott ES	2016	King County	1
Keller ES	2016	Kirkland	1
Lakeview ES	2018	Kirkland	2
Muir ES	2018	Kirkland	2
Rose Hill ES	2018	Kirkland	2
Twain ES	2018	Kirkland	3
Rush ES	2018	Kirkland	1
Kirkland MS*	2020	Kirkland	2
Rose Hill MS*	2020	Redmond	6
Inglewood MS*	2020	Sammamish	2
Sandburg ES	2020	Kirkland	1
Bell ES	2020	Kirkland	3
Frost ES	2020	Kirkland	3
Thoreau ES	2020	Kirkland	3

* Portables moved from Lake Washington High School

V. Six-Year Planning and Construction Plan *(continued)***Construction of New Schools/Additions/Rebuilding and Enlarging**

Facility	Completion Date	Location	Added Capacity
Redmond ES Addition (7 classrooms)	Fall 2016	Redmond	161
Replacing Explorer Community ES	Fall 2017	King County	-
Clara Barton ES (New)	Fall 2018	Redmond	690
Ella Baker ES (New)	Fall 2018	King County	690
Rebuild and expand Kirk ES	Fall 2019	Kirkland	299
Rebuild and expand Mead ES	Fall 2019	Sammamish	230
Timberline MS (New)	Fall 2019	King County	896
Rebuild and expand Juanita HS	Phase I: Fall 2019 Phase II: Fall 2020	Kirkland	504
Remodeling Old Redmond Schoolhouse for Preschool	Fall 2020	Redmond	-

A bond measure presented to voters in February 2018 did not receive a sufficient majority to pass. However, the need for the projects remains. The 2018 bond measure included the following projects:

Proposed Project	Location
New elementary school	Kirkland
An addition at Lake Washington HS	Kirkland
Rebuilding and expanding Alcott ES	King County
Rebuilding and expanding Kamiakin MS	Kirkland
New Eastside Choice high school	Sammamish
Land purchases for new schools	-

V. Six-Year Planning and Construction Plan (*continued*)

In April 2019, voters approved a Capital Projects Levy measure which incorporated two projects from the 2018 bond as well as additional projects needed to provide required capacity. The district has funding from the 2019 levy measure to construct the following projects within the period of this plan:

Project	Completion Date	Location	Added Capacity
Lake Washington HS Addition (20 classrooms)	Fall 2020	Kirkland	500
Franklin ES Addition (8 classrooms)	Fall 2021	Kirkland	184
Rose Hill ES Addition (8 classrooms)	Fall 2021	Kirkland	184
Twain ES Addition (4 classrooms)	Fall 2021	Kirkland	92
Carson ES Addition (4 classrooms)	Fall 2022	Sammamish	92

The Facility Advisory Committee recommended construction projects to be built through 2030. The following are projects to be built within the six-year planning timeline although funding still needs to be secured.

Project	Location	Added Capacity
Rebuild or expand Kamiakin MS	Kirkland	330
Rebuild and enlarge Alcott ES	King County	207
New choice high school	Redmond/ Eastlake area	600
New elementary school	Lake Washington area	690
Build permanent elementary capacity	Redmond area	552
Refurbish Juanita HS Fieldhouse/Pool	Kirkland	-

The District may also need to purchase and use relocatables to address capacity needs at sites able to accommodate additional relocatables.

VI. Relocatable and Transitional Classrooms

The district facility inventory includes 162 relocatables (i.e. portable classroom units). Relocatables provide standard capacity and special program space as outlined in *Section III* (see *Appendix A-1*).

Relocatable classrooms have been used over the prior six-year planning timeline to address capacity needs throughout the district (details identified in *Section V: Use of Portables*).

The district's long-term plan anticipates providing new and expanded permanent facilities to serve student enrollment. When these permanent facilities are funded and completed, the district may be able to reduce the reliance on relocatables.

For a definition of relocatables and permanent facilities, see *Section 2* of *King County Code 21A.06*.

As enrollment fluctuates, relocatables provide flexibility to accommodate immediate needs and interim housing. Because of this, new school and rebuilt/enlarged school sites are planned for the potential of adding up to four relocatables to accommodate the changes in demographics. The use and need for relocatable classrooms will be balanced against program needs.

VII. Six-Year Classroom Capacities: Availability / Deficit Projection

As demonstrated in *Appendix A-2*, the district currently has permanent capacity (classroom and special education) to serve 13,615 students at the elementary level, 7,547 students at the middle school level, and 8,976 students at the high school level. Current enrollment at each grade level is identified in *Appendix A-2*. Completed projects, as shown in Table 5, would result in an increased permanent capacity for 2931 students in 2026. Relocatable facilities will be used to address capacity needs that cannot be immediately served by permanent capacity.

Differing growth patterns throughout the district may cause some communities to experience overcrowding. This is especially true in portions of the district where significant housing development has taken place. A strong residential building market, growth, and the number of developments under construction continues to increase. The continued development of north and northwest Redmond, the Sammamish Plateau, the downtown and Totem Lake areas of Kirkland, and in-fill and short plats in multiple municipalities will put additional pressure on schools in those areas.

VIII. Impact Fees and the Finance Plan

The school impact fee formula calculates a proportionate share of the costs of system improvements that are reasonably related to new development. The formula multiplies the per student costs of site acquisition and construction costs for new capacity projects by a student generation rate to identify the per dwelling unit share of the facilities that are needed to serve new growth. (The student generation rate is the average number of students generated by dwelling unit type – new single family and multi-family dwelling units.) The formula then provides a credit against the calculated costs per dwelling unit for any School Construction Assistance Program funding that the District expects to receive for a new capacity project from the State of Washington and for the estimated taxes that a new homeowner will pay toward the debt service on school construction bonds. The calculated fee (see *Appendix B* and *Appendix C*) is then discounted, as required by ordinance, by fifty percent.

For the purposes of this plan and the impact fee calculations, the actual construction cost data from recently completed projects (Peter Kirk Elementary School, Timberline Middle School, and Juanita High School all opened in 2019) have been used (see *Appendix E*).

The finance plan shown on *Table 6* demonstrates how the Lake Washington School District plans to finance improvements for the years 2021 through 2026. The financing components include secured and unsecured funding. This plan is based on current and future project approval, securing state construction assistance, and collection of impact fees under the state's Growth Management Act.

IX. Appendices

Appendices A 1-2: Calculations of Capacities for Elementary Schools,
Middle Schools, and Senior High Schools

Appendix B: Calculations of Impact Fees for Single Family
Residences

Appendix C: Calculations of Impact Fees for Multi-Family
Residences

Appendix D: Student Generation Factor Calculations

Appendix E: Calculation Back-Up

	TOTAL ALL CLASSROOMS						
	Number of Classrooms			Capacity			
Elementary Schools	Permanent	Relocatable	Total	Permanent	Relocatable	Total	
				23	23		
ALCOTT	26	12	38	598	276	874	
AUDUBON	26	3	29	598	69	667	
BELL	27	3	30	621	69	690	
BLACKWELL	24	3	27	552	69	621	
CARSON	23	4	27	529	92	621	
CLARA BARTON	34	0	34	782	0	782	
COMMUNITY	3	0	3	69	0	69	
DICKINSON	23	4	27	529	92	621	
DISCOVERY	3	0	3	69	0	69	
EINSTEIN	24	1	25	552	23	575	
ELLA BAKER	34	0	34	782	0	782	
EXPLORER	4	0	4	92	0	92	
FRANKLIN	23	3	26	529	69	598	
FROST	24	4	28	552	92	644	
JUANITA	23	0	23	529	0	529	
KELLER	21	1	22	483	23	506	
KIRK	34	0	34	782	0	782	
LAKEVIEW	22	6	28	506	138	644	
MANN	22	4	26	506	92	598	
MCAULIFFE	23	7	30	529	161	690	
MEAD	34	0	34	782	0	782	
MUIR	23	2	25	529	46	575	
REDMOND	31	8	39	713	184	897	
ROCKWELL	25	5	30	575	115	690	
ROSA PARKS	27	10	37	621	230	851	
ROSE HILL	24	4	28	552	92	644	
RUSH	28	4	32	644	92	736	
SANDBURG	25	1	26	575	23	598	
SMITH	26	8	34	598	184	782	
THOREAU	22	3	25	506	69	575	
TWAIN	26	7	33	598	161	759	
WILDER	23	8	31	529	184	713	
Totals	757	115	872	17,411	2,645	20,056	
	Number of Classrooms			Capacity			
Middle Schools	Permanent	Relocatable	Total	Capacity Percent	Permanent (30 x Capacity %)	Relocatable (30 x Capacity %)	Total
ENVIRONMENTAL****	5	0	5	83%	125	0	125
EVERGREEN	38	13	51	83%	946	324	1,270
FINN HILL****	28	0	28	83%	697	0	697
INGLEWOOD	54	2	56	83%	1,345	50	1,395
INTERNATIONAL****	21	0	21	83%	523	0	523
KAMIAKIN	30	7	37	70%	630	147	777
KIRKLAND****	28	2	30	83%	697	50	747
NORTHSTAR	4	0	4	70%	84	0	84
REDMOND****	37	7	44	83%	921	174	1,095
TIMBERLINE	39	0	39	83%	971	0	971
RENAISSANCE	4	0	4	70%	84	0	84
ROSE HILL****	41	6	47	83%	1,021	149	1,170
STELLA SCHOLA	3	0	3	83%	75	0	75
Totals	332	37	369		8,119	894	9,013
	Number of Classrooms			Capacity			
Senior High Schools	Permanent	Relocatable	Total	Capacity Percent	Permanent (32 x Capacity %)	Relocatable (32 x Capacity %)	Total
EMERSON HIGH	10	2	12	70%	224	45	269
EASTLAKE	96	0	96	83%	2,550	0	2,550
FUTURES	3	0	3	70%	67	0	67
JUANITA	74	0	74	83%	1,965	0	1,965
LAKE WASHINGTON****	79	0	79	83%	2,098	0	2,098
REDMOND****	73	8	81	83%	1,939	212	2,151
TESLA STEM****	24	0	24	83%	637	0	637
Totals	359	10	369		9,480	257	9,737
TOTAL DISTRICT	1,448	162	1,610		35,010	3,796	38,806
Key:							
Total Enrollment on this chart does not include Emerson K-12, contractual, and WANIC students							
Self-contained rooms have a capacity of 12							
Non-modernized secondary schools have standard capacity of 70%							
****Modernized secondary schools have standard capacity of 83%							

		SPECIAL PROGRAM CLASSROOMS USED									NET AVAILABLE CAPACITY				ENROLLMENT
		Number of Classrooms							Number of Classrooms						
Elementary Schools	Permanent Classrooms	Self Cont.	Resource Rooms	ELL Rooms	Pre-School	Music Rooms	Arts/Sci Rooms	Pull-out Quest	Net Permanent	Relocatable	Net Permanent 23	Self Contained Classroom	Relocatable 23	Total	Oct 2020
ALCOTT	26	0	2	1	0	2	0	0	21	12	483	0	276	759	702
AUDUBON	26	0	2	1	0	1	1	0	21	3	483	0	69	552	507
BELL	27	0	2	1	4	1	1	0	18	3	414	0	69	483	436
BLACKWELL	24	0	1	1	0	1	0	0	21	3	483	0	69	552	526
CARSON	23	0	1	1	3	1	1	0	16	4	368	0	92	460	460
CLARA BARTON	34	2	1	1	0	1	1	0	28	0	644	24	0	668	602
COMMUNITY	3	0	0	0	0	0	0	0	3	0	69	0	0	69	66
DICKINSON	23	2	3	1	0	2	0	0	15	4	345	24	92	461	330
DISCOVERY	3	0	0	0	0	0	0	0	3	0	69	0	0	69	73
EINSTEIN	24	0	2	1	0	1	0	0	20	1	460	0	23	483	452
ELLA BAKER	34	0	1	1	0	1	1	0	30	0	690	0	0	690	510
EXPLORER	4	0	0	0	0	0	0	0	4	0	92	0	0	92	72
FRANKLIN	23	2	2	1	0	1	1	0	16	3	368	24	69	461	439
FROST	24	2	2	1	0	1	1	0	17	4	391	24	92	507	418
JUANITA	23	0	1	1	3	1	1	0	16	0	368	0	0	368	318
KELLER	21	2	2	1	0	1	1	0	14	1	322	24	23	369	305
KIRK	34	0	1	1	0	1	1	0	30	0	690	0	0	690	626
LAKEVIEW	22	0	1	1	0	1	1	0	18	6	414	0	138	552	486
MANN	22	2	2	1	0	1	1	0	15	4	345	24	92	461	355
MCAULIFFE	23	2	1	1	0	1	0	1	17	7	391	24	161	576	597
MEAD	34	0	1	1	0	1	1	0	30	0	690	0	0	690	681
MUIR	23	0	3	1	1	1	1	0	16	2	368	0	46	414	368
REDMOND	31	2	4	1	0	2	0	0	22	8	506	24	184	714	669
ROCKWELL	25	0	2	1	0	2	0	0	20	5	460	0	115	575	521
ROSA PARKS	27	1	2	1	0	2	1	0	20	10	460	12	230	702	603
ROSE HILL	24	2	1	1	0	1	1	0	18	4	414	24	92	530	478
RUSH	28	0	2	1	0	1	1	0	23	4	529	0	92	621	653
SANDBURG	25	0	3	1	1	1	1	0	18	1	414	0	23	437	408
SMITH	26	0	4	1	0	2	0	0	19	8	437	0	184	621	642
THOREAU	22	0	2	1	0	1	0	1	17	3	391	0	69	460	458
TWAIN	26	2	2	1	0	1	1	0	19	7	437	24	161	622	636
WILDER	23	0	2	0	2	2	0	1	16	8	368	0	184	552	349
Totals	757	21	55	28	14	36	19	3	581	115	13,363	252	2,645	16,260	14,746
		Number of Classrooms													
Middle Schools	Permanent Classrooms	Self Cont.	Resource Rooms	ELL Rooms					Net Permanent Classrooms	Relocatable Classrooms	Net Permanent Classrooms	Self Contained Classroom	Relocatable Capacity	Total	Oct 2020
ENVIRONMENTAL****	5	0	0	0					5	0	125	0	0	125	140
EVERGREEN	38	2	4	0					32	13	797	24	324	1,145	734
FINN HILL****	28	1	1	1					25	0	623	12	0	635	693
INGLEWOOD	54	1	2	0					51	2	1,270	12	50	1,332	1,255
INTERNATIONAL****	21	0	0	0					21	0	523	0	0	523	415
KAMIAKIN	30	2	1	1					26	7	546	24	147	717	624
KIRKLAND****	28	1	1	1					25	2	623	12	50	685	550
NORTHSTAR	4	0	0	0					4	0	84	0	0	84	90
REDMOND****	37	1	0	1					35	7	872	12	174	1,058	986
TIMBERLINE	39	0	2	1					36	0	896	0	0	896	809
RENAISSANCE	4	0	0	0					4	0	84	0	0	84	88
ROSE HILL****	41	1	2	1					37	6	921	12	149	1,082	951
STELLA SCHOLA	3	0	0	0					3	0	75	0	0	75	90
Totals	332	9	13	6					304	37	7,439	108	894	8,441	7,425
		Number of Classrooms													
Senior High Schools	Permanent Classrooms	Self Cont.	Resource Rooms	ELL Rooms					Net Permanent Classrooms	Relocatable Classrooms	Net Permanent Classrooms	Self Contained Classroom	Relocatable Capacity	Total	Oct 2020
EMERSON HIGH	10	0	2	0					8	2	179	0	45	224	45
EASTLAKE	96	2	5	1					88	0	2,337	24	0	2,361	2,055
FUTURES	3	0	0	0					3	0	67	0	0	67	23
JUANITA	74	2	3	1					68	0	1,806	24	0	1,830	1,472
LAKE WASHINGTON****	79	1	2	1					75	0	1,992	12	0	2,004	1,706
REDMOND****	73	1	0	1					71	8	1,886	12	212	2,110	1,966
TESLA STEM****	24	0	0	0					24	0	637	0	0	637	608
Totals	359	6	12	4					337	10	8,904	72	257	9,233	7,875
TOTAL DISTRICT	1,448	36	80	38	14	36	19	3	1,222	162	29,706	432	3,796	33,934	30,046
Key: Total Enrollment on this chart does not include Emerson K-12, contractual, and WANIC students Self-contained rooms have a capacity of 12 Non-modernized secondary schools have standard capacity of 70% ****Modernized secondary schools have standard capacity of 83%															

Estimated School Impact Fee Calculation Based on King County Code 21.A.43

Single Family Residence ("SFR")

School Site Acquisition Cost:

	<u>Facility Acreage</u>	<u>Cost/ Acre</u>	<u>Facility Size</u>	<u>Site Cost/ Student</u>	<u>Student Factor</u>	<u>Cost/ SFR</u>
Elementary	7	\$1,600,000	690	\$16,232	0.3700	\$6,006
Middle	15	\$0	900	\$0	0.1530	\$0
Senior	30	\$0	1800	\$0	0.1470	\$0
TOTAL						\$6,006

School Construction Cost:

	<u>Percent Permanent</u>	<u>Construction Cost</u>	<u>Facility Size</u>	<u>Bldg. Cost/ Student</u>	<u>Student Factor</u>	<u>Cost/ SFR</u>
Elementary	90%	\$46,470,020	690	\$60,613	0.3700	\$22,427
Middle	90%	\$78,648,300	900	\$78,648	0.1530	\$12,033
Senior	90%	\$117,766,755	1800	\$58,883	0.1470	\$8,656
TOTAL						\$43,116

Temporary Facility Cost:

	<u>Percent Temporary</u>	<u>Construction Cost</u>	<u>Facility Size</u>	<u>Bldg. Cost/ Student</u>	<u>Student Factor</u>	<u>Cost/ SFR</u>
Elementary	10%	\$225,000	23	\$978	0.3700	\$362
Middle	10%	\$225,000	30	\$750	0.1530	\$115
Senior	10%	\$225,000	32	\$703	0.1470	\$103
TOTAL						\$580

State Assistance Credit Calculation:

	<u>Const Cost Allocation</u>	<u>Sq. Ft./ Student</u>	<u>Funding Assistance</u>	<u>Credit/ Student</u>	<u>Student Factor</u>	<u>Cost/ SFR</u>
Elementary	238.22	90.0	28.12%	\$6,029	0.3700	\$2,231
Middle	238.22	108.0	28.12%	\$7,235	0.1530	\$1,107
Senior	238.22	130.0	28.12%	\$8,708	0.1470	\$1,280
TOTAL						\$4,618

**Estimated School Impact Fee Calculation
Based on King County Code 21.A.43****Single Family Residence ("SFR")****Tax Payment Credit Calculation:**

Average SFR Assessed Value	\$928,310
Current Capital Levy Rate (2021)/\$1000	\$0.87
Annual Tax Payment	\$807.63
Years Amortized	10
Current Bond Interest Rate	2.44%

Present Value of Revenue Stream	\$7,090
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Impact Fee Summary for Single Family Residence:

Site Acquisition Cost	\$6,006
Permanent Facility Cost	\$43,116
Temporary Facility Cost	\$580
State Assistance Credit	(\$4,618)
Tax Payment Credit	(\$7,090)

Sub-Total	\$37,994
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50% Local Share	\$18,997
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SFR Impact Fee	\$18,997
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Estimated School Impact Fee Calculation Based on King County Code 21.A.43

Multiple Family Residence ("MFR")

School Site Acquisition Cost:

	<u>Facility Acreage</u>	<u>Cost/ Acre</u>	<u>Facility Size</u>	<u>Site Cost/ Student</u>	<u>Student Factor</u>	<u>Cost/ MFR</u>
Elementary	7	\$1,600,000	690	\$16,232	0.0820	\$1,331
Middle	15	\$0	900	\$0	0.0350	\$0
Senior	30	\$0	1800	\$0	0.0330	\$0
TOTAL						\$1,331

School Construction Cost:

	<u>Percent Permanent</u>	<u>Construction Cost</u>	<u>Facility Size</u>	<u>Bldg. Cost/ Student</u>	<u>Student Factor</u>	<u>Cost/ MFR</u>
Elementary	90%	\$46,470,020	690	\$60,613	0.0820	\$4,970
Middle	90%	\$78,648,300	900	\$78,648	0.0350	\$2,753
Senior	90%	\$117,766,755	1800	\$58,883	0.0330	\$1,943
TOTAL						\$9,666

Temporary Facility Cost:

	<u>Percent Temporary</u>	<u>Construction Cost</u>	<u>Facility Size</u>	<u>Bldg. Cost/ Student</u>	<u>Student Factor</u>	<u>Cost/ MFR</u>
Elementary	10%	\$225,000	23	\$978	0.0820	\$80
Middle	10%	\$225,000	30	\$750	0.0350	\$26
Senior	10%	\$225,000	32	\$703	0.0330	\$23
TOTAL						\$130

State Assistance Credit Calculation:

	<u>Const Cost Allocation</u>	<u>Sq. Ft./ Student</u>	<u>Funding Assistance</u>	<u>Credit/ Student</u>	<u>Student Factor</u>	<u>Cost/ MFR</u>
Elementary	238.22	90.0	28.12%	\$6,029	0.0820	\$494
Middle	238.22	108.0	28.12%	\$7,235	0.0350	\$253
Senior	238.22	130.0	28.12%	\$8,708	0.0330	\$287
TOTAL						\$1,035

**Estimated School Impact Fee Calculation
Based on King County Code 21.A.43****Multiple Family Residence ("MFR")****Tax Payment Credit Calculation:**

Average MFR Assessed Value	\$402,226
Current Capital Levy Rate (2021)/\$1000	\$0.87
Annual Tax Payment	\$349.94
Years Amortized	10
Current Bond Interest Rate	2.44%
Present Value of Revenue Stream	\$3,072

Impact Fee Summary for Multiple Family Residence:

Site Acquisition Cost	\$1,331
Permanent Facility Cost	\$9,666
Temporary Facility Cost	\$130
State Assistance Credit	(\$1,035)
Tax Payment Credit	(\$3,072)
Sub-Total	\$7,020
50% Local Share	\$3,510

MFR Impact Fee	\$3,510
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2020 MITIGATION DEVELOPMENT SUMMARY
STUDENT GENERATION FACTORS
 Five Year History

SINGLE FAMILY DEVELOPMENTS	CITY/ COUNTY	# PLANNED	# COMPL.	# OCCUP.	2020 STUDENTS				2020 RATIO			
					ELEM	MIDDLE	SENIOR	TOTAL	ELEM	MIDDLE	SENIOR	TOTAL
Ashford Chase	S	36	36	36	26	7	6	39	0.722	0.194	0.167	1.083
Barrington Park	S	44	44	44	22	12	11	45	0.500	0.273	0.250	1.023
Benjamin Estates	K	23	23	23	3	2	2	7	0.130	0.087	0.087	0.304
Bradford Place	S	16	16	16	11	5	1	17	0.688	0.313	0.063	1.063
Brauerwood Estates	S	33	33	33	25	9	10	44	0.758	0.273	0.303	1.333
Brixton	S	32	32	32	21	8	6	35	0.656	0.250	0.188	1.094
Brookside at The Woodlands	R	22	22	22	15	7	4	26	0.682	0.318	0.182	1.182
Callan Ridge	R	28	28	28	3	6	4	13	0.107	0.214	0.143	0.464
Canterbury Park	S	115	114	102	39	17	14	70	0.382	0.167	0.137	0.686
Clear Creek	K	19	19	19	6	2	0	8	0.316	0.105	0.000	0.421
Crestview	R	31	31	31	16	7	0	23	0.516	0.226	0.000	0.742
Duke's Landing	R	18	18	18	2	4	4	10	0.111	0.222	0.222	0.556
English Landing II	S	25	25	25	5	3	3	11	0.200	0.120	0.120	0.440
English Landing I	R	50	50	50	24	13	4	41	0.480	0.260	0.080	0.820
Gabrielle's Place	S	14	14	14	8	5	0	13	0.571	0.357	0.000	0.929
Glenshire at English Hill Div II	R	16	16	16	7	2	8	17	0.438	0.125	0.500	1.063
Glenshire at English Hill Div III	R	9	9	9	2	1	4	7	0.222	0.111	0.444	0.778
Greystone Manor I	R	90	90	90	49	28	22	99	0.544	0.311	0.244	1.100
Greystone Manor II	R	94	83	61	23	8	6	37	0.377	0.131	0.098	0.607
Hawthorne Park	R	38	26	25	8	5	6	19	0.320	0.200	0.240	0.760
Heather's Ridge	K	41	41	41	8	1	3	12	0.195	0.024	0.073	0.293
Hedgewood	R	11	11	11	2	1	3	6	0.182	0.091	0.273	0.545
Hedgewood East	R	15	15	15	3	1	0	4	0.200	0.067	0.000	0.267
Highland Ridge	K	18	18	18	3	1	2	6	0.167	0.056	0.111	0.333
Inglewood Landing	S	21	21	21	7	0	1	8	0.333	0.000	0.048	0.381
Kirkwood Terrace	KC	12	12	12	5	1	3	9	0.417	0.083	0.250	0.750
Lake Vista	S	18	18	18	10	3	2	15	0.556	0.167	0.111	0.833
Marinwood	K	48	48	48	9	4	4	17	0.188	0.083	0.083	0.354
Meritage Ridge	K	36	36	36	7	0	0	7	0.194	0.000	0.000	0.194
Morningside Estates	S	22	22	22	12	5	3	20	0.545	0.227	0.136	0.909
Panorama Estates	K	18	18	18	5	0	0	5	0.278	0.000	0.000	0.278
Pinnacle at Inglewood Hill	S	37	37	37	16	6	3	25	0.432	0.162	0.081	0.676
Preserve at Kirkland	K	35	35	35	4	1	7	12	0.114	0.029	0.200	0.343
Radke	K	20	20	20	0	1	1	2	0.000	0.050	0.050	0.100
Ray Meadows	R	27	27	27	2	0	2	4	0.074	0.000	0.074	0.148
Reese's Run	S	22	22	22	13	5	7	25	0.591	0.227	0.318	1.136
Sagebrook	R	15	15	15	10	4	2	16	0.667	0.267	0.133	1.067
Sammamish Ridge Estates	S	12	8	7	0	0	1	1	0.000	0.000	0.143	0.143
Sequoia Glen Cryder	R	52	52	52	23	10	3	36	0.442	0.192	0.058	0.692
Shadow Creek	R	15	15	15	8	3	3	14	0.533	0.200	0.200	0.933
Sheldon Estates / Hillbrooke Crest	R	15	15	15	10	2	1	13	0.667	0.133	0.067	0.867
Sycamore Park	R	12	12	12	4	1	1	6	0.333	0.083	0.083	0.500
The Retreat	R	14	14	14	2	0	0	2	0.143	0.000	0.000	0.143

2020 MITIGATION DEVELOPMENT SUMMARY
STUDENT GENERATION FACTORS
 Five Year History

SINGLE FAMILY DEVELOPMENTS	CITY/ COUNTY	#	#	#	2020 STUDENTS				2020 RATIO			
		PLANNED	COMPL.	OCCUP.	ELEM	MIDDLE	SENIOR	TOTAL	ELEM	MIDDLE	SENIOR	TOTAL
The Rise	R	23	23	23	4	1	1	6	0.174	0.043	0.043	0.261
Verona I/Vistas I/Vistas II	R	46	38	38	6	5	22	33	0.158	0.132	0.579	0.868
Vintner's Ridge	K	51	51	51	9	4	8	21	0.176	0.078	0.157	0.412
Willowmere Park	R	53	53	53	16	6	9	31	0.302	0.113	0.170	0.585
Willows Bluff	K	26	26	26	7	0	2	9	0.269	0.000	0.077	0.346
Wisti Lane	K	18	18	18	7	0	4	11	0.389	0.000	0.222	0.611
Woodhaven	KC	62	62	62	26	12	7	45	0.000	0.000	0.000	0.000
TOTALS		1,568	1,532	1,496	553	229	220	1,002	0.370	0.153	0.147	0.670

MULTI-FAMILY DEVELOPMENTS	CITY/ COUNTY	# OF UNITS	% OCCUP/ # COMPL.	# OCCUP.	2019 STUDENTS				2019 STUDENTS			
					ELEM	MIDDLE	SENIOR	TOTAL	ELEM	MIDDLE	SENIOR	TOTAL
Alexan at Marymoor Apartments	R	222	95%	211	6	1	1	8	0.028	0.005	0.005	0.038
Allez Apartments	R	148	96%	143	4	0	1	5	0.028	0.000	0.007	0.035
Arete Apartments	K	62	98%	61	3	1	2	6	0.049	0.016	0.033	0.098
Artesa Condos	K	13	13	13	3	0	0	3	0.231	0.000	0.000	0.231
Capri Apartments	K	73	97%	71	4	0	0	4	0.056	0.000	0.000	0.056
Carter on the Park Apartments	R	180	96%	173	4	1	2	7	0.023	0.006	0.012	0.040
Core 83 Apartments	R	120	100%	120	2	4	4	10	0.017	0.033	0.033	0.083
Heron Flats & Lofts	R	95	95%	90	5	1	0	6	0.056	0.011	0.000	0.067
Kestrel Ridge Townhomes	S	35	35	35	6	2	3	11	0.171	0.057	0.086	0.314
Kirkland Crossing Apartments	K	185	99%	183	2	0	0	2	0.011	0.000	0.000	0.011
Marymoore Ridge Condos	R	44	44	44	7	2	1	10	0.159	0.045	0.023	0.227
Mile House Apartments	R	177	98%	173	2	1	1	4	0.012	0.006	0.006	0.023
Old Town Lofts Apartments	R	149	95%	142	3	2	0	5	0.021	0.014	0.000	0.035
Pure Apartments	R	105	97%	102	2	0	0	2	0.020	0.000	0.000	0.020
Ravello Apartments	R	20	75%	15	0	1	2	3	0.000	0.067	0.133	0.200
Redmond Ridge Apartments	KB	109	90%	98	83	55	35	173	0.847	0.561	0.357	1.765
Rose Terrace Condos	K	12	12	12	1	0	0	1	0.083	0.000	0.000	0.083
Rosehaven at Bradford Place Condos	K	16	16	16	1	0	3	4	0.063	0.000	0.188	0.250
Sky Sammamish Apartments	S	159	91%	145	10	5	10	25	0.069	0.034	0.069	0.172
Southeast Village Townhomes	S	75	70	70	21	5	6	32	0.300	0.071	0.086	0.457
State Street Condos	K	27	27	27	1	1	1	3	0.037	0.037	0.037	0.111
Station House Lofts	R	196	93%	183	7	2	0	9	0.038	0.011	0.000	0.049
The Luke Apartments	R	208	97%	201	9	2	1	12	0.045	0.010	0.005	0.060
The Rise Duplex	K	38	38	38	5	1	6	12	0.132	0.026	0.158	0.316
The Samm Apartments	S	92	92%	85	0	0	1	1	0.000	0.000	0.012	0.012
The Walk Condos	K	20	20	20	2	2	0	4	0.100	0.100	0.000	0.200
Villas @ Mondavia Townhomes	R	84	84	84	23	5	9	37	0.274	0.060	0.107	0.440
Voda Apartments	K	127	93%	118	4	1	0	5	0.034	0.008	0.000	0.042
Waterfront Condos	K	18	18	18	0	0	1	1	0.000	0.000	0.056	0.056
TOTALS		2,809		2,691	220	95	90	405	0.082	0.035	0.033	0.151

Peter Kirk Elementary School

<i>690 student capacity</i>	
Construction Cost (bid 2018, actual const. costs)	\$38,231,000
Projected Construction Cost in 2022 @ 690 student capacity @ 5% per year	\$46,470,020

Timberline Middle School

<i>900 student capacity</i>	
Construction Cost (bid 2017, actual const. costs)	\$61,623,000
Projected Construction Cost in 2022 @ 900 student capacity @ 5% per year	\$78,648,300

Juanita High School

<i>1,800 student capacity</i>	
Construction Cost (bid 2018 actual const. costs)	\$96,887,000
Projected Construction Cost in 2022 @ 1,800 student capacity @ 5% per year	\$117,766,755

X. Tables

Table 1, 1A: Six-Year Enrollment Projections and Ten-Year Low, Medium, High Enrollment Forecast

Table 2: Enrollment History

Table 3: Inventory and Capacities of Existing Schools

Table 4, 4A: Inventory of Undeveloped Land and District Map

Table 5: Projected Capacity to House Students

Table 6: Six-Year Finance Plan

Six-Year Enrollment Projections

	<u>2020*</u>	<u>2021</u>	<u>2022</u>	<u>2023</u>	<u>2024</u>	<u>2025</u>	<u>2026</u>
County Live Births**	25,487	25,872	25,117	24,217	23,945	24,291	23,227
change	139	385	(755)	(900)	(272)	346	(1,064)
Kindergarten ***	2,115	2,487	2,269	2,187	2,162	2,194	2,097
Grade 1 ****	2,429	2,329	2,722	2,503	2,414	2,388	2,422
Grade 2	2,578	2,698	2,429	2,830	2,613	2,521	2,494
Grade 3	2,510	2,787	2,755	2,485	2,891	2,675	2,582
Grade 4	2,564	2,652	2,820	2,788	2,517	2,927	2,713
Grade 5	2,574	2,683	2,660	2,827	2,795	2,525	2,938
Grade 6	2,398	2,653	2,713	2,693	2,861	2,829	2,558
Grade 7	2,473	2,485	2,659	2,720	2,701	2,869	2,833
Grade 8	2,399	2,562	2,489	2,665	2,726	2,709	2,872
Grade 9	2,272	2,418	2,513	2,444	2,616	2,677	2,663
Grade 10	2,271	2,360	2,460	2,556	2,489	2,659	2,716
Grade 11	2,108	2,235	2,256	2,345	2,432	2,374	2,516
Grade 12	1,957	2,048	2,137	2,156	2,242	2,325	2,268
Total Enrollment	30,648	32,397	32,882	33,199	33,459	33,672	33,672
Yearly Increase		1,749	485	317	260	213	0
Yearly Increase		5.71%	1.50%	0.96%	0.78%	0.64%	0.00%
Cumulative Increase		1,749	2,234	2,551	2,811	3,024	3,024

* Number of Individual Students (10/1/20 Headcount).

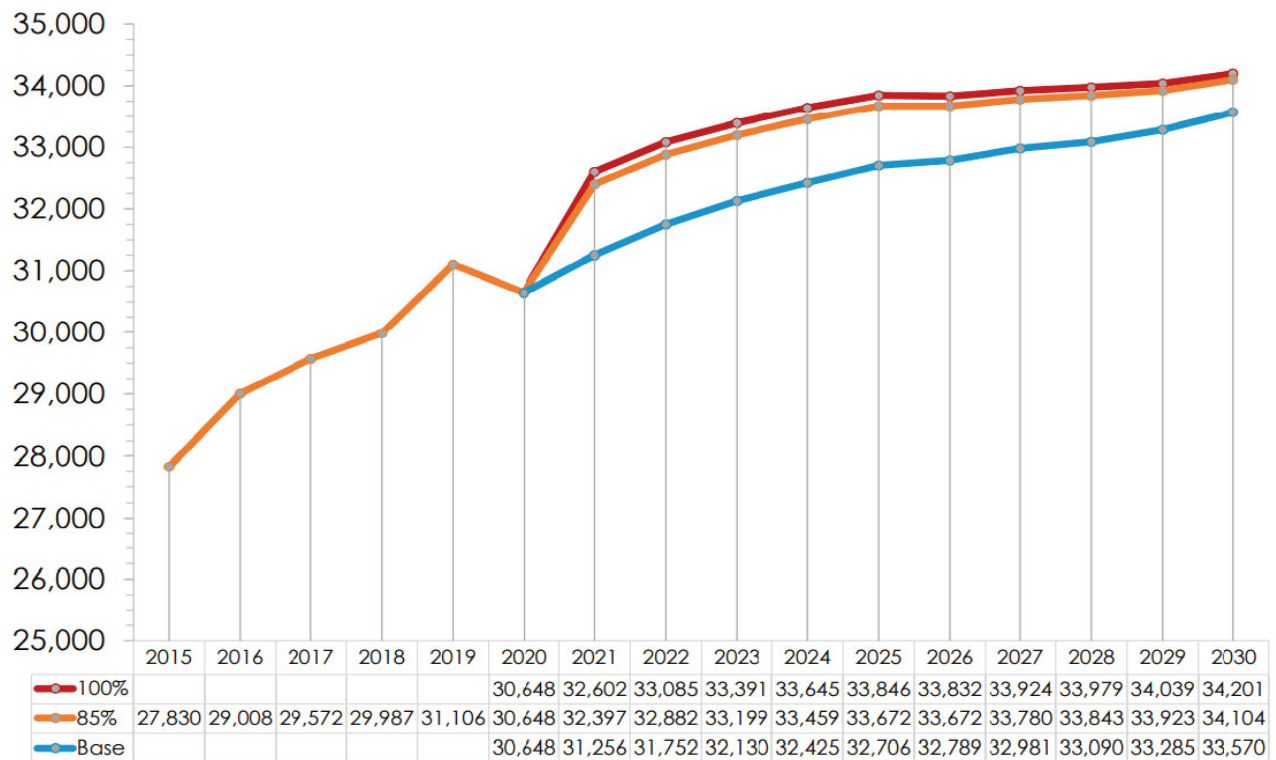
** County Live Births estimated. 2024 and prior year birth rates are actual births 5 years prior to enrollment year.

*** Kindergarten enrollment is calculated at 8.8% of County Live Births plus anticipated developments.

**** First Grade enrollment is based on District's past history of first grade enrollment to prior year kindergarten enrollment.

Source: Flo Analytics

Ten-Year Low, Medium, High Enrollment Forecast



Source: Flo Analytics

Enrollment History *

	<u>2011</u>	<u>2012</u>	<u>2013</u>	<u>2014</u>	<u>2015</u>	<u>2016</u>	<u>2017</u>	<u>2018</u>	<u>2019</u>	<u>2020</u>
County Live Births **	24,244	24,899	25,222	25,057	24,514	24,630	25,032	24,910	25,348	25,487
Kindergarten / Live Birth	7.87%	7.86%	8.08%	8.02%	8.97%	9.46%	8.93%	9.41%	9.31%	8.30%
	Period Average									8.62%
Kindergarten	1,908	1,957	2,037	2,009	2,198	2,329	2,236	2,343	2,359	2,115
Grade 1	2,121	2,150	2,218	2,292	2,292	2,537	2,503	2,474	2,646	2,429
Grade 2	2,203	2,174	2,228	2,284	2,405	2,414	2,585	2,599	2,595	2,578
Grade 3	2,116	2,207	2,236	2,270	2,363	2,492	2,465	2,587	2,667	2,510
Grade 4	1,986	2,125	2,231	2,258	2,315	2,427	2,536	2,479	2,638	2,564
Grade 5	2,051	2,003	2,137	2,257	2,258	2,349	2,470	2,479	2,473	2,574
Grade 6	1,920	2,002	1,979	2,123	2,213	2,270	2,329	2,468	2,543	2,398
Grade 7	1,857	1,929	2,047	2,023	2,114	2,258	2,301	2,298	2,460	2,473
Grade 8	1,831	1,860	1,924	2,053	2,002	2,121	2,229	2,303	2,342	2,399
Grade 9	1,687	1,802	1,868	1,933	1,999	2,002	2,083	2,175	2,287	2,272
Grade 10	1,740	1,714	1,795	1,853	1,961	2,022	2,023	2,089	2,210	2,271
Grade 11	1,671	1,730	1,649	1,727	1,780	1,896	1,869	1,851	1,995	2,108
Grade 12	1,824	1,742	1,699	1,634	1,930	1,889	1,941	1,842	1,885	1,957
Total Enrollment	24,915	25,395	26,048	26,716	27,830	29,006	29,570	29,987	31,100	30,648
Yearly Change		480	653	668	1,114	1,176	564	417	1,113	(452)
* October 1st Headcount	Average increase in the number of students per year									637
** Number indicates actual births	Total increase for period									5,733
5 years prior to enrollment year.	Percentage increase for period									23%
	Average yearly increase									2.56%

2020-21 Inventory and Capacities of Existing Schools

			<u>Total</u> <u>Capacity**</u>	<u>Net Avail</u> <u>Capacity**</u>
*	<u>Juanita Area</u>	<u>Address</u>		
25	Frost Elementary	11801 NE 140th	644	507
03	Juanita Elementary	9635 NE 132nd	529	368
04	Keller Elementary	13820 108th NE	506	369
26	Muir Elementary	14012 132nd NE	575	414
06	Discovery Community	12801 84th NE	69	69
06	Sandburg Elementary	12801 84th NE	598	437
02	Thoreau Elementary	8224 NE 138th	575	460
60	Environmental & Adventure	8040 NE 132nd	125	125
63	Finn Hill Middle School	8040 NE 132nd	697	635
67	Kamiakin Middle School	14111 132nd NE	777	717
82	Futures School	10601 NE 132nd	67	67
82	Juanita High School	10601 NE 132nd	1,965	1,830
	<u>Kirkland Area</u>			
07	Bell Elementary	11212 NE 112th	690	483
96	Community School	11133 NE 65th	69	69
16	Franklin Elementary	12434 NE 60th	598	461
09	Kirk Elementary	1312 6th Street	782	690
10	Lakeview Elementary	10400 NE 68th	644	552
15	Rose Hill Elementary	8044 128th NE	644	530
18	Rush Elementary	6101 152nd NE	736	621
14	Twain Elementary	9525 130th NE	759	622
96	International Community School	11133 NE 65th	523	523
65	Kirkland Middle School	430 18th Avenue	747	685
80	Northstar Middle School	12033 NE 80th	84	84
69	Rose Hill Middle School	13505 NE 75th	1,170	1,082
61	Stella Schola Middle School	13505 NE 75th	75	75
80	Emerson High	10903 NE 53rd St	269	224
84	Lake Washington High	12033 NE 80th	2,098	2,004
	<u>Redmond Area</u>			
53	Alcott Elementary	4213 228th NE	874	759
19	Audubon Elementary	3045 180th NE	667	552
28	Clara Barton Elementary	12101 172nd Ave NE	782	668
46	Dickinson Elementary	7040 208th NE	621	461
24	Einstein Elementary	18025 NE 116th	575	483
31	Ella Baker Elementary	9595 Eastridge Dr. NE	782	690
46	Explorer Community School	7040 208th NE	92	92
22	Mann Elementary	17001 NE 104th	598	461
23	Redmond Elementary	16800 NE 80th	897	714
21	Rockwell Elementary	11125 162nd NE	690	575
41	Rosa Parks Elementary	22845 NE Cedar Park Crescent	851	702
32	Wilder Elementary	22130 NE 133rd	713	552
74	Evergreen Middle School	6900 208th NE	1,270	1,145
71	Redmond Middle School	10055 166th NE	1,095	1,058
85	Redmond High School	17272 NE 104th	2,151	2,110
73	Tesla STEM High School	400 228th Ave NE	637	637
	<u>Sammamish Area</u>			
54	Blackwell Elementary	3225 205th PL NE	621	552
52	Carson Elementary	1035 244th Ave NE	621	460
57	McAuliffe Elementary	23823 NE 22nd	690	576
58	Mead Elementary	1725 216th NE	782	690
56	Smith Elementary	23305 NE 14th	782	621
77	Inglewood Middle School	24120 NE 8th	1,395	1,332
86	Renaissance	400 228th NE	84	84
72	Timberline Middle School	9900 Redmond Ridge Drive	971	896
86	Eastlake High School	400 228TH NE	2,550	2,361

* Note: See Table 4a for District Map. Locations indicated by numbers stated in this column.

** Note: "Total Capacity" = Total permanent/portable capacity as constructed
(Total Capacity does not account for space used by special programs)
"Net Available Capacity" = Total Capacity minus uses for special programs
(Net Available Capacity accounts for space used by special programs)

Inventory of Undeveloped Land

Area	Site #	Acreage	Address	Jurisdiction	Status
Juanita	None				
Kirkland	None				
Redmond	33	20.0	194th NE/NE 122nd	King County	No School Use ¹
	75	37.8	22000 Novelty Hill Road	King County	In Reserve ²
	90	26.9	NE 95th and 196th Ave NE	King County	No School Use ¹
	91	3.4	NE 95 th Street and 173 rd Place NE	King County	In Reserve ²
	Site # TBD	25.4	188 th Ave NE and NE 70 th	Redmond	In Reserve
Sammamish	59	15.5	Main and 228 th NE	Sammamish	In Reserve

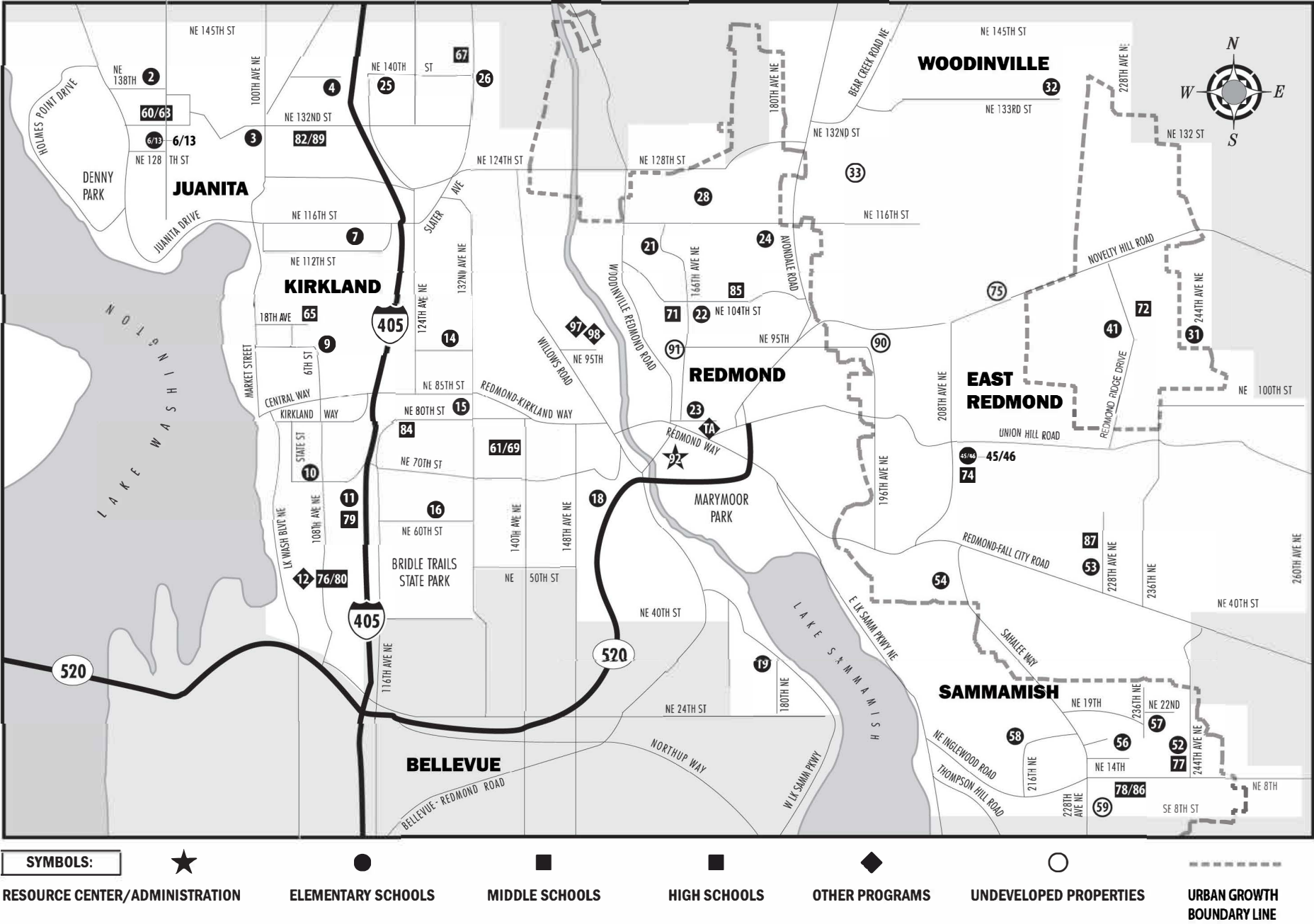
King County School Siting Task Force Findings:

Site 33	20.0 acres located 1/4 mile east of Avondale Road; no school use allowed; potential conservation value.
Site 75	37.8 acres located on the north side of Novelty Hill Road & adjacent to south boundary of Redmond Ridge. The district must work with King County to find an alternative site within the UGA. If an alternative site cannot be feasibly located, the district can use the site for a "small (5 acre) environmental school" while placing the remainder of the use into permanent conservation.
Site 90	26.9 acres located 1/4 mile south of Novelty Hill Road and 1/2 mile east of Redmond City Limits; no school use allowed.
Site 91	N/A

¹ Property unable to be used for a school site due to the King County School Siting Task Force recommendations as adopted by the King County Council.

² Refers to district owned sites on which school construction is not anticipated within the six-year term of the current Capital Facilities Plan. The property is being held for the district's long term needs.

LAKE WASHINGTON SCHOOL DISTRICT



Projected Permanent Capacity to House Students

	2020	2021	2022	2023	2024	2025	2026
Permanent Capacity	30,138						
New Construction:							
Franklin Elementary School Addition #16		184					
Rose Hill Elementary School Addition #15		184					
Twain Elementary School Addition #14		92					
Carson Elementary School Addition #52			92				
** New Eastside Choice High School in Sammamish					600		
** Alcott Elementary School #53					207		
** Kamiakin Middle School #67						330	
**New Elementary School in Lake Washington Learning Area						690	
**New Elementary School in Redmond Learning Area						552	
**Refurbish Juanita High School Fieldhouse and Pool #82					0		
Permanent Capacity Subtotal	30,138	30,598	30,690	30,690	31,497	33,069	33,069
Total Enrollment	30,648	32,397	32,882	33,199	33,459	33,672	33,672
Permanent Surplus/(Deficit) <u>without unsecured</u> Projects	(510)	(1,799)	(2,192)	(2,509)	(2,769)	(2,982)	(2,982)
Permanent Surplus / (Deficit) <u>with</u> Projects	(510)	(1,799)	(2,192)	(2,509)	(1,962)	(603)	(603)

** Projects that are not funded

Six-Year Finance Plan

Fiscal Year *							Est Secured		
	2021	2022	2023	2024	2025	2026	Total	State	Local ^
2019 Levy Projects (voter approved)									
Site 16 Addition - Franklin Elementary School	1,000,000						1,000,000		1,000,000
Site 15 Addition - Rose Hill Elementary School	800,000						800,000		800,000
Site 14 Addition - Twain Elementary School	500,000						500,000		500,000
Site 52 Addition - Carson Elementary School	4,300,000	500,000					4,800,000		4,800,000
Proposed Projects **									
Site TBD New - Choice High School in Sammamish/Redmond			18,200,000	18,800,000	500,000		37,500,000		37,500,000
Site 53 Rebuild/Enlarge - Alcott Elementary			28,600,000	29,800,000	700,000		59,100,000		59,100,000
Site 67 Rebuild/Enlarge - Kamiakin Middle School			13,200,000	51,800,000	30,500,000	6,000,000	101,500,000		101,500,000
Site TBD New - Elementary School in Lake Washington Learning Area			1,800,000	11,700,000	40,400,000	4,600,000	58,500,000		58,500,000
Site TBD New - Elementary School in Redmond Learning Area			1,500,000	9,900,000	34,200,000	3,900,000	49,500,000		49,500,000
Site 82 Refurbish Juanita High School Fieldhouse and Pool			10,800,000	11,200,000	400,000		22,400,000		22,400,000
Relocatable Classrooms (as needed)									
Relocatables	3,500,000	1,350,000	1,350,000	1,350,000	1,350,000	1,350,000	10,250,000		10,250,000
Property Acquisition									
Land		15,000,000			15,000,000		30,000,000		30,000,000
Totals									
	\$10,100,000	\$16,850,000	\$75,450,000	\$134,550,000	\$123,050,000	\$15,850,000	\$375,850,000	\$0	\$375,850,000

* Fiscal year is from September of the year stated through August of the following year (e.g. "2020" means "September 2020 through August 2021")

** Monies for the major projects above have not been secured but these projects are shown because of the need

^ Includes secured and unsecured local bond funding and impact fees. Impact fees may be applied to growth related capacity projects.