

**BELLINGHAM SCHOOL DISTRICT NO. 501  
CAPITAL FACILITIES PLAN  
2009-2015**

**BOARD OF DIRECTORS**

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## I. EXECUTIVE SUMMARY

This Capital Facilities Plan (the “Plan”) has been prepared by the Bellingham School District No. 501 (the District”) as the District’s principal facility planning document, in compliance with the requirements of Washington’s Growth Management Act. It has been prepared using data available in June 2009.

This Plan is consistent with prior long-term capital facilities plans adopted by the District. However, it is not intended to be the sole plan for all the District’s needs. The District also prepares interim long-range capital facilities plans consistent with board policies. Such plans take into account longer and shorter time periods, other factors, and trends in the use of facilities, and other needs of the District as may be required. These plans are consistent with this Plan. Pursuant to the requirements of the Growth Management Act, this Plan and the fee schedule will be updated based on the City of Bellingham’s and Whatcom County’s schedules for updating comprehensive plans.

The City of Bellingham has adopted a school impact fee ordinance. This updated Plan must be adopted by reference as a part of the City’s Comprehensive Plan. For impact fees to be collected in unincorporated areas of Whatcom County, the Whatcom County Council must adopt this Plan and must adopt a school impact fee ordinance.

The Plan establishes a service standard in order to ascertain current and future capacity. Though the Office of the Superintendent of Public Instruction (“OSPI”) establishes square foot guidelines for use as capacity funding criteria, those guidelines do not account for the local program needs in the District. The Growth Management Act authorizes the District to make adjustments to the service standard based on the District’s specific needs. In general, the District’s current standard provides the following:

<b>Grade Level</b>	<b>Class Size</b>
Primary (K-3)	22.5 Students
Intermediate (4-5)	22.5 Students
Middle School (6-8)	25 Students
High School (9-12)	25 Students

School capacity is based on the number of teaching stations or classrooms, class size, and the type of educational program provided by the school district. Existing inventory includes both permanent and relocatable classrooms. The District’s 2008-2009 permanent capacity is 10,160 (plus relocatable capacity of 648), and student enrollment is 10,594. Based upon preliminary projections, the District anticipates growth in enrollment to be focused in the elementary and high school levels. The District has identified a need for new capacity at the elementary level during the next six years. The District anticipates needing additional middle school and high school capacity in the next ten years.

A financing plan is included in Section VII which demonstrates the District’s ability to implement this Plan.

## II. SIX YEAR ENROLLMENT PROJECTIONS

Enrollment projects are most accurate for the initial years of the forecast period. Moving further into the future, more assumptions about economic conditions and demographic trends in the area affect the projections. In recent years, enrollment growth in the District as a whole has slowed. Since 2004 enrollment has increased at the elementary level, decreased at the middle level, and remained relatively constant at the high school level. Based upon City of Bellingham planning reports (including the City's comprehensive growth plan and a draft growth report) and Whatcom County growth forecasts, the District can expect continued enrollment growth throughout the years of this Plan. Updates to this Plan will reflect new information regarding expected growth.

Student enrollment projections have been developed using two methods. First, the District reviewed the Office of Superintendent of Public Instruction (OSPI) enrollment projections. The OSPI projections use the cohort survival method. This method uses historic patterns of student progression by grade level to measure the portion of students moving from one grade level up to the next higher cohort or grade. This ratio, or survival rate, is used in conjunction with an estimate of kindergarten enrollment as a base for enrollment projections. Due to the fact that the cohort survival method does not incorporate in-migration, particularly from anticipated new development within the District, these projections are considered highly conservative. See Table 1-A.

The second forecast was prepared for the District by a demographer. These projections use recent trends, actual birth rates, and information about population growth (from the City of Bellingham and Whatcom County) within the District's boundary area. The demographer prepared low, medium, and high forecast ranges. The District is using the medium forecast range as a basis for its enrollment projections. See Table 1-C.

### III. SERVICE STANDARDS

The District's service standard is used to ascertain its overall capacity. The service standard identifies the program year, the class size, the number of classrooms, students, and programs of special needs. The service standard outlined below reflects only those programs and educational opportunities provided to students which directly affect the capacity of the school buildings.

The District operates basic educational programs under the following grade level configurations:

Elementary schools house kindergarten through grade five.

Middle schools house grades six through eight.

High schools house grades nine through twelve.

For the 2004 Capital Facilities Plan, the District engaged in a comprehensive review of its facilities, identifying the actual use of each school for regular classroom instruction, special programs, and other non-instructional needs. In preparation for this Plan, the District reviewed and updated that information.

#### Service Standard for Elementary Students

- In general, class size for grades K-3 should not exceed 22.5 students.
- In general, class size for grades 4-5 should not exceed 22.5 students.
- Special Education for students with disabilities is generally provided in self-contained classrooms.
- Music instruction for all students is generally provided in a separate classroom.
- Computer instruction for all students is generally provided in both the classroom and a special computer lab.

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

- Resource rooms
- Learning assisted programs
- Life skills programs
- Mild, moderate, and severe disabilities

#### Service Standard for Secondary Students

- In general, class size for grades 6-8 should not exceed 25 students.
- In general, class size for grades 9-12 should not exceed 25 students.
- Special Education for students with disabilities is generally provided in self-contained classrooms.
- Music instruction for all students is generally provided in a separate classroom.
- Computer instruction for all students is generally provided in both the classroom and special computer lab.

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

- Resource rooms
- Learning assisted programs
- Life skills programs
- Mild, moderate, and severe disabilities

### Room Utilization

It is not possible to achieve 100% utilization of regular teaching stations because of scheduling conflicts for student programs, the need for specialized rooms for certain programs, and the need for teachers to have a work space during their planning periods.

### New School Planning

When planning, designing, and constructing new schools, the school facilities are sized to accommodate the number of students shown below:

- Elementary schools – 450 to 500 students
- Middle schools – 650 to 700 students
- High schools – 1,200 students

When acquiring new school sites, the following standards are used:

- Elementary schools – 10 acres
- Middle schools – 20 acres
- High schools – 40 acres

#### **IV. INVENTORY AND EVALUATION OF CURRENT FACILITIES**

As discussed above in Section III, the District uses a comprehensive facility review which identifies the actual use of each school for regular classroom instruction, special programs, and other programmatic needs.

In the fall of 2008, the District opened its 14<sup>th</sup> Elementary School, Wade King Elementary. Although Lowell Elementary School remains temporarily closed as a component of the District's Budget Savings Plan, the District has included the Lowell capacity in its capacity calculations.

The District currently has permanent capacity to house 10,160 students and relocatable capacity to house 648 students. This capacity is based upon the District's service standard as set forth in Section III. The District's actual enrollment in October 2008 was 10,594. See Table 1-B (note that Table 1-B shows an October 2008 reported enrollment of 10, 598; the District subsequently updated this figure to 10,594 during that same reporting period). Based upon the District's enrollment projections, the District's enrollment is projected to increase to 12,009 in 2015 (see Table 1-C).

Calculations of elementary, middle school, and high school capacities are set forth in Tables 2-A and 2-B.

##### Relocatables

The District inventory includes 41 relocatables (portable classrooms), with 28 available for regular classroom use.

Based on enrollment projects and planned permanent facilities, the District may need to acquire additional relocatables during the next six-year period.

As enrollment fluctuates, relocatables provide flexibility to accommodate immediate needs and interim housing. The use and need for relocatables will be balanced against program needs.

Table 2-B contains an evaluation of District capacity in relation to the six-year enrollment projections.

## **V. THE DISTRICT'S SIX-YEAR CONSTRUCTION PLAN**

During the next six years, new growth will create the need to complete one new elementary school. To respond to neighborhood enrollment projections, the new elementary school is planned on Aldrich Road. The 2006 Bond measure approved by the District's voters provided funding for the new elementary school.

An extensive review of existing facilities will be conducted as a part of any future bond issue. During that process the District will identify additional capacity enhancement projects as well as major maintenance and modernization projects which will be required. Currently, the district has no plans for a bond issue although this will be reviewed annually in light of enrollment trends, economic conditions and other factors.

## **VI. SIX-YEAR CLASSROOM CAPACITIES: AVAILABILITY/DEFICIT PROJECTION**

Based on the District's enrollment forecast, current service standard, current inventory and capacity, and future planned classroom space, enrollment will exceed District permanent capacity at all grade levels within the six-year period covered by this Plan.

To meet the needs associated with deficiencies or surpluses, the District will utilize a number of tools. These tools may include the movement of relocatables, boundary changes, new construction, and modifications in the educational program. Completion of the new elementary school on Aldrich Road will accommodate expected growth during the six year planning period at the elementary level. The District will consider a new middle school over the next ten years and classroom additions at the high school level. Future updates to this Plan will include relevant information. The District may also purchase additional portables during the six years of this Plan.

## VII. FINANCE PLAN

The Finance Plan shown on Table 3 demonstrates how the District plans to finance improvements for the years 2009 through 2015. The financing components include secured and unsecured funding. The Finance Plan is based on secured bond funding, collection of impact fees under the State Growth Management Act, and the possibility of a future bond issue which will need to be approved by voters to fund other school projects.

The District does not expect to be eligible for state school construction assistance for the capacity projects included in this Plan.

## VIII. IMPACT FEES

New residential developments built within the District's boundaries will generate additional students. Specifically, the District's student generation rate indicates that .374 students will be generated from each new single family development in the District and .151 students will be generated from each new multi-family dwelling unit. (See Appendix B.) These students will create the need for additional capacity at the elementary level.

The impact fee formula takes into account the cost of the growth-related capital improvements identified in this Plan for the next six years. It calculates the fiscal impact of each single-family or multi-family development in the District based on projected student generation rates for single-family and multi-family dwelling units. It also takes into account the taxes that will be paid by these developments and any funds that will be provided by the State for new construction. For the impact fee calculations see Appendix A. School impact fees will be used to offset that portion of the cost to construct a new elementary school that is related to new growth, with the majority of the facility being funded by state and local funds.

School impact fees will not be used to fund improvements necessary to correct existing needs.

### **School Impact Fee Schedule**

Impact fee per single-family dwelling unit	\$1,854.00
Impact fee per multi-family dwelling unit	\$1,154.00

**Table 1-A: OSPI Cohort Enrollment Projections**

STATE OF WASHINGTON  
SUPERINTENDENT OF PUBLIC INSTRUCTION  
OLYMPIA

REPORT NO. 1049  
RUN ON 16:10 NOV 14 '08

D E T E R M I N A T I O N O F P R O J E C T E D E N R O L L M E N T S

B Y C O H O R T S U R V I V A L K K L I N E A R P R O J E C T I O N

BELLINGHAM	DISTRICT NO. 501 WHATCOM						COUNTY NO. 37						
	----ACTUAL ENROLLMENTS ON OCTOBER FIRST----						AVER. % SURVIVAL	-----P R O J E C T E D E N R O L L M E N T S--					
	2003	2004	2005	2006	2007	2008		2009	2010	2011	2012	2013	2014
KINDERGARTEN	714	758	724	712	719	681		689	680	672	663	655	647
GRADE 1	723	795	820	785	770	797	109.38	745	754	744	735	725	716
GRADE 2	772	744	782	822	782	774	100.32	800	747	756	746	737	727
GRADE 3	730	765	741	795	851	799	101.21	783	810	756	765	755	746
GRADE 4	732	748	761	742	800	840	100.28	801	785	812	758	767	757
GRADE 5	773	726	745	772	738	818	100.38	843	804	788	815	761	770
GRADE 6	819	785	711	739	812	750	101.09	827	852	813	797	824	769
K-6 HEADCOUNT	5,263	5,321	5,284	5,367	5,472	5,459		5,488	5,432	5,341	5,279	5,224	5,132
K-6 W/K @ 1/2	4,906	4,942	4,922	5,011	5,113	5,119		5,144	5,092	5,005	4,948	4,897	4,809
GRADE 7	812	849	794	703	763	827	101.75	763	841	867	827	811	838
GRADE 8	826	827	837	820	723	775	101.62	840	775	855	881	840	824
7-8 HEADCOUNT	1,638	1,676	1,631	1,523	1,486	1,602		1,603	1,616	1,722	1,708	1,651	1,662
GRADE 9	1,011	1,014	1,070	1,114	912	856	122.97	953	1,033	953	1,051	1,083	1,033
GRADE 10	922	923	936	956	957	903	91.57	784	873	946	873	962	992
GRADE 11	853	872	838	828	879	906	92.09	832	722	804	871	804	886
GRADE 12	646	746	678	703	811	825	88.18	799	734	637	709	768	709
9-12 HEADCOUNT	3,432	3,555	3,522	3,601	3,559	3,490		3,368	3,362	3,340	3,504	3,617	3,620
K-12 HEADCOUNT	10,333	10,552	10,437	10,491	10,517	10,551		10,459	10,410	10,403	10,491	10,492	10,414

### Table 1-B: OSPI Reported Enrollment

REPORT 1251H

STATE OF WASHINGTON  
SUPERINTENDENT OF PUBLIC INSTRUCTION

RUN JUN 17, 2009 @ 20:09

SUMMARY OF HEAD-COUNT ENROLLMENT AS REPORTED ON FORM P223 FOR SCHOOL YEAR ENDING 2009

	Bellingham S.D. No. 501					Whatcom County No. 37				Northwest E.S.D. 189
GRADES	SEPTEMBER	OCTOBER	NOVEMBER	DECEMBER	JANUARY	FEBRUARY	MARCH	APRIL	MAY	AVERAGE
HALF-DY.	672.00	681.00	685.00	684.00	684.00	681.00	685.00	688.00	686.00	692.89
FIRST	785.00	796.00	794.00	788.00	786.00	780.00	778.00	777.00	781.00	785.00
SECOND	771.00	774.00	778.00	779.00	783.00	771.00	774.00	780.00	783.00	777.00
THIRD	791.00	799.00	800.00	799.00	798.00	796.00	798.00	806.00	809.00	799.56
FOURTH	827.00	840.00	842.00	845.00	847.00	840.00	846.00	846.00	845.00	842.00
FIFTH	806.00	820.00	820.00	821.00	820.00	818.00	821.00	819.00	822.00	818.56
SIXTH	742.00	750.00	754.00	757.00	755.00	747.00	748.00	747.00	745.00	749.44
SEVENTH	822.00	828.00	823.00	826.00	824.00	816.00	831.00	836.00	835.00	826.78
EIGHTH	773.00	775.00	774.00	773.00	767.00	753.00	759.00	753.00	751.00	764.22
NINTH	853.00	863.00	861.00	862.00	867.00	856.00	860.00	852.00	857.00	859.00
TENTH	897.00	906.00	903.00	903.00	896.00	887.00	894.00	898.00	898.00	898.00
ELEVENTH	917.00	915.00	907.00	896.00	888.00	874.00	870.00	864.00	862.00	898.11
TWELFTH	845.00	851.00	836.00	829.00	825.00	803.00	796.00	772.00	767.00	813.78
KINDERGARTEN	672.00	681.00	685.00	684.00	684.00	681.00	685.00	688.00	686.00	692.89
GRADES 1-3	2,347.00	2,369.00	2,372.00	2,366.00	2,367.00	2,347.00	2,350.00	2,363.00	2,373.00	2,361.56
GRADE 4	827.00	840.00	842.00	845.00	847.00	840.00	846.00	846.00	845.00	842.00
GRADES 5-6	1,548.00	1,570.00	1,574.00	1,578.00	1,575.00	1,565.00	1,569.00	1,566.00	1,567.00	1,568.00
GRADES 7-8	1,595.00	1,603.00	1,597.00	1,599.00	1,591.00	1,569.00	1,590.00	1,589.00	1,586.00	1,591.00
GRADES 9-12	3,512.00	3,535.00	3,507.00	3,490.00	3,476.00	3,420.00	3,420.00	3,386.00	3,384.00	3,458.89
*** TOTALS	10,501.00	10,598.00	10,577.00	10,562.00	10,540.00	10,422.00	10,460.00	10,438.00	10,441.00	10,504.33
RUNNING START	OCTOBER	NOVEMBER	DECEMBER	JANUARY	FEBRUARY	MARCH	APRIL	MAY	JUNE	AVERAGE
TOTAL RS	366.00	357.00	357.00	368.00	359.00	352.00	363.00	364.00	348.00	359.33
RS ONLY	147.00	142.00	144.00	143.00	138.00	144.00	138.00	138.00	141.00	141.67
* - Months in Average		*	*	*	*	*	*	*	*	
	SEPTEMBER	OCTOBER	NOVEMBER	DECEMBER	JANUARY	FEBRUARY	MARCH	APRIL	MAY	AVERAGE
Bilingual Stu.	492.00	561.00	561.00	564.00	566.00	564.00	572.00	571.00	574.00	566.63

**Table 1-C: District Enrollment Projections**

**Projection (Medium)**

	Projected Births																			
	2004	2005	2006	2007	2008	2009	2010	2011	2012	2013	2014	2015	2016	2017	2018	2019	2020	2021	2022	2023
City Births	851	929	840	953																
County Births	2061	2122	2209	2210	2282	2298	2327	2356	2406	2451	2484	2505	2529	2554	2575	2595	2605	2607	2609	2612
% of Cohort	34.9%	34.9%	34.8%	34.8%	34.7%	34.7%	34.6%	34.6%	34.5%	34.5%	34.4%	34.4%	34.3%	34.3%	34.2%	34.2%	34.1%	34.1%	34.0%	34.0%
<b>Projections</b>																				
	Oct-09	Oct-10	Oct-11	Oct-12	Oct-13	Oct-14	Oct-15	Oct-16	Oct-17	Oct-18	Oct-19	Oct-20	Oct-21	Oct-22	Oct-23	Oct-24	Oct-25	Oct-26	Oct-27	Oct-28
K	721	741	772	773	798	804	814	816	833	847	857	863	865	872	878	884	886	885	884	884
1	745	789	811	845	847	875	881	891	894	912	928	939	941	943	951	957	963	965	965	964
2	800	748	792	816	850	852	880	885	895	898	916	932	939	941	943	951	957	963	965	965
3	784	810	757	803	828	862	864	892	897	907	910	928	940	947	949	951	959	965	971	973
4	802	786	812	761	807	832	866	867	895	900	910	913	927	939	946	948	950	958	964	970
5	844	805	789	817	766	812	837	870	871	900	905	915	913	927	939	946	948	950	958	964
6	829	853	814	799	828	776	823	847	880	881	911	916	921	919	933	946	953	955	957	965
7	764	844	868	830	815	844	791	838	863	896	897	928	928	933	931	946	959	966	968	970
8	843	777	858	884	846	830	860	805	853	878	912	913	940	940	945	943	958	971	978	980
9	936	1037	956	1058	1090	1043	1023	1059	991	1050	1081	1123	1119	1152	1152	1158	1155	1174	1190	1198
10	793	860	953	880	974	1004	960	941	974	912	966	994	1028	1024	1054	1054	1060	1057	1074	1089
11	837	731	793	881	813	900	928	886	869	899	842	892	913	944	941	968	968	974	971	987
12	<u>820</u>	<u>748</u>	<u>653</u>	<u>710</u>	<u>789</u>	<u>728</u>	<u>806</u>	<u>830</u>	<u>793</u>	<u>778</u>	<u>804</u>	<u>753</u>	<u>794</u>	<u>813</u>	<u>840</u>	<u>838</u>	<u>862</u>	<u>862</u>	<u>867</u>	<u>864</u>
<b>Total</b>	<b>10518</b>	<b>10529</b>	<b>10628</b>	<b>10857</b>	<b>11051</b>	<b>11162</b>	<b>11333</b>	<b>11427</b>	<b>11508</b>	<b>11658</b>	<b>11839</b>	<b>12009</b>	<b>12168</b>	<b>12294</b>	<b>12402</b>	<b>12490</b>	<b>12578</b>	<b>12645</b>	<b>12712</b>	<b>12773</b>
Change	-76	11	99	228	194	111	171	95	80	150	181	170	159	126	108	88	88	67	67	61
Percent	-0.7%	0.1%	0.9%	2.1%	1.8%	1.0%	1.5%	0.8%	0.7%	1.3%	1.6%	1.4%	1.3%	1.0%	0.9%	0.7%	0.7%	0.5%	0.5%	0.5%
<b>Enrollment by Level</b>																				
K-5	4696	4679	4733	4815	4896	5037	5142	5221	5285	5364	5426	5490	5525	5569	5606	5637	5663	5686	5707	5720
6-8	2436	2474	2540	2513	2489	2450	2474	2490	2596	2655	2720	2757	2789	2792	2809	2835	2870	2892	2903	2915
9-12	3386	3376	3355	3529	3666	3675	3717	3716	3627	3639	3693	3762	3854	3933	3987	4018	4045	4067	4102	4138

**Table 2-A**  
Existing Facilities

<b>EXISTING ELEMENTARY SCHOOLS - CLASSROOM CAPACITIES (R: 6-15-09)</b>									
<b>SCHOOLS</b>	<b>Number of Classrooms</b>	<b>Available for Basic Educ.</b>	<b>Class Size</b>	<b>Classroom Capacity</b>	<b>Number of Portables</b>	<b>Available for Basic Educ.</b>	<b>Class Size</b>	<b>Capacity of Portables</b>	<b>Grand Total Capacity</b>
Alderwood	18	15	22.5	338	3	2	22.5	45	383
Birchwood	12	9	22.5	203	6	5	22.5	113	315
Carl Cozier	19	16	22.5	360	3	0	22.5	0	360
Columbia	13	10	22.5	225	0	0	22.5	0	225
Geneva	22	20	22.5	450	3	2	22.5	45	495
Happy Valley	16	15	22.5	338	7	4	22.5	90	428
Larrabee	7	7	22.5	158	3	3	22.5	68	225
Lowell (Temporarily Closed)	17	13	22.5	293	0	0	22.5	0	293
Northern Heights	21	18	22.5	405	0	0	22.5	0	405
Parkview	16	15	22.5	338	1	1	22.5	23	360
Roosevelt	22	18	22.5	405	0	0	22.5	0	405
Silver Beach	21	18	22.5	405	0	0	22.5	0	405
Sunnyland	14	12	22.5	270	4	4	22.5	90	360
Wade King	24	20	22.5	450	0	0	22.5	0	450
<b>Elementary Total</b>	<b>242</b>	<b>206</b>		<b>4,635</b>	<b>30</b>	<b>21</b>		<b>473</b>	<b>5,108</b>
*Special Education, Music, Computer Labs, etc.									

**EXISTING MIDDLE/HIGH SCHOOLS - CLASSROOM CAPACITIES (R: 6-15-09)**

SCHOOLS	Number of Classrooms	Available for Basic Educ.	Class Size	Classroom Capacity	Number of Portables	Available for Basic Educ.	Class Size	Capacity of Portables	Grand Total Capacity
Fairhaven MS	30	28	25	650	0	0	25	0	650
Kulshan MS	28	28	25	650	2	1	25	25	675
Shuksan MS	28	21	25	525	0	0	25	0	525
Whatcom MS	31	18	25	450	4	4	25	100	550
<b>Middle School Total</b>	<b>115</b>	<b>91</b>		<b>2,275</b>	<b>8</b>	<b>5</b>		<b>125</b>	<b>2,400</b>
Bellingham HS	49	42	25	1050	0	0	25	0	1,050
Sehome HS	47	40	25	1000	2	1	25	25	1,025
Squalicum HS	56	48	25	1200	1	1	25	25	1,225
<b>High School Total</b>				<b>3,250</b>	<b>3</b>	<b>2</b>		<b>50</b>	<b>3,300</b>
<b>K-12 Summary:</b>	<b>357</b>	<b>297</b>		<b>10,160</b>	<b>41</b>	<b>28</b>		<b>648</b>	<b>10,808</b>

**Table 2-B  
PROJECTED CAPACITY BY GRADE LEVEL: 2009-2015**

<b>ELEMENTARY SCHOOL FACILITIES</b>	<b>Actual Oct. 2008</b>	<b>2009</b>	<b>2010</b>	<b>2011</b>	<b>2012</b>	<b>2013</b>	<b>2014</b>	<b>2015</b>
Permanent Capacity	4,635	4,635	4,635	4,635	5,085	5,085	5,085	5,085
Capacity Enhancements (Portables)	473	473	473	473	473	473	473	473
Enhanced Capacity	5,108	5,108	5,108	5,108	5,558	5,558	5,558	5,558
New Construction					450			
School Closures								
Projected Enrollment	4,708	4,696	4,679	4,733	4,815	4,896	5,037	5,142
Permanent Capacity Surplus/(Deficit)	(73)	(61)	(44)	(98)	270	189	48	(57)
Enhanced Capacity Surplus/(Deficit)	400	412	429	375	743	662	521	416
Alrich Elementary Opens Fall 2012								
<b>MIDDLE SCHOOL FACILITIES</b>	<b>Actual Oct. 2008</b>	<b>2009</b>	<b>2010</b>	<b>2011</b>	<b>2012</b>	<b>2013</b>	<b>2014</b>	<b>2015</b>
Permanent Capacity	2,325	2,275	2,275	2,275	2,275	2,275	2,275	2,275
Capacity Enhancements (Portables)	125	125	125	125	125	125	125	125
Enhanced Capacity	2,450	2,400	2,400	2,400	2,400	2,400	2,400	2,400
New Construction								
School Closures								
Projected Enrollment	2,353	2,436	2,474	2,540	2,513	2,489	2,450	2,474
Permanent Capacity Surplus/(Deficit)	(28)	(161)	(199)	(265)	(238)	(214)	(175)	(199)
Enhanced Capacity Surplus/(Deficit)	97	(36)	(74)	(140)	(113)	(89)	(50)	(74)
New Shuksan Replaces Old Shuksan Fall 2009								
<b>HIGH SCHOOL FACILITIES</b>	<b>Actual Oct. 2008</b>	<b>2009</b>	<b>2010</b>	<b>2011</b>	<b>2012</b>	<b>2013</b>	<b>2014</b>	<b>2015</b>
Permanent Capacity	3,250	3,250	3,250	3,250	3,250	3,250	3,250	3,250
Capacity Enhancements (Portables)	50	50	50	50	50	50	50	50
Enhanced Capacity	3,300	3,300	3,300	3,300	3,300	3,300	3,300	3,300
New Construction								
School Closures								
Projected Enrollment	3,533	3,386	3,376	3,355	3,529	3,666	3,675	3,717
Permanent Capacity Surplus/(Deficit)	(283)	(136)	(126)	(105)	(279)	(416)	(425)	(467)
Enhanced Capacity Surplus/(Deficit)	(233)	(86)	(76)	(55)	(229)	(366)	(375)	(417)

**TABLE 3**  
**Six Year Finance Plan**

Capacity Improvements

	2009	2010	2011	2012	2013	2014	2015	Total <sup>1</sup>	Secured Local	Unsecured Local <sup>2</sup>
Aldrich Elementary		\$10,000	\$4,300					\$14,300 <sup>3</sup>	\$14,300	
Aldrich Elementary Property	\$760 <sup>4</sup>							\$760	\$760	
Portables					\$300			\$300		\$300
Future Elementary Property Purchase		\$1,500 <sup>5</sup>						\$1,500	\$1,500	
<b>Total</b>	<b>\$760</b>	<b>\$11,500</b>	<b>\$4,600</b>					<b>\$16,860</b>	<b>\$16,560</b>	<b>\$300</b>

\*Dollars are in 1,000s.

<sup>1</sup> The District does not expect to be eligible for state funding assistance for the above capacity projects.

<sup>2</sup> These are expected to be secured through local bond issues and impact fees

<sup>3</sup> Construction costs only.

<sup>4</sup> Purchased in 2005; listed herein for information purposes.

<sup>5</sup> Based on recent property appraisals.

**APPENDIX A  
IMPACT FEE CALCULATIONS**

School Impact Fee Calculation				DISTRICT Bellingham School District #501			
<b>School Site Acquisition Cost:</b> ((AcresxCost per Acre)/Facility Capacity)xStudent Generation Factor							
	Facility	Cost/	Facility	Student	Student	Cost/	Cost/
	Acreage	Acre	Capacity	SFR	MFR	SFR	MFR
Elementar	0.00	\$0	450	0.183	0.096	\$0	\$0
Middle	0.00	\$0	650	0.082	0.020	\$0	\$0
Sr. High	0.00	\$0	400	0.109	0.034	\$0	\$0
				<b>TOTAL</b>		<b>\$0</b>	<b>\$0</b>
<b>School Construction Cost:</b> ((Facility Cost/Facility Capacity)xStudent Generation Factor)x(permanent/Total Sq Ft)							
	%Perm/	Facility	Facility	Student	Student	Cost/	Cost/
	Total Sq.Ft	Cost	Capacity	SFR	MFR	SFR	MFR
Elementar	96.80%	\$14,300,000	450	0.183	0.096	\$5,629	\$2,953
Middle	96.80%	\$0	700	0.082	0.020	\$0	\$0
Sr. High	96.80%	\$0	400	0.109	0.034	\$0	\$0
				<b>TOTAL</b>		<b>\$5,629</b>	<b>\$2,953</b>
<b>Temporary Facility Cost:</b> ((Facility Cost/Facility Capacity)xStudent Generation Factor)x(Temporary/Total Square Feet)							
	%Temp/	Facility	Facility	Student	Student	Cost/	Cost/
	Total Sq.Ft	Cost	Size	SFR	MFR	SFR	MFR
Elementar	3.20%	\$0	25	0.183	0.096	\$0	\$0
Middle	3.20%	\$0	25	0.082	0.020	\$0	\$0
Sr. High	3.20%	\$0	25	0.109	0.034	\$0	\$0
				<b>TOTAL</b>		<b>\$0</b>	<b>\$0</b>
<b>State Matching Credit:</b> Boeckh Index X SPI Square Footage X District Match % X Student Factor							
	Boeckh	SPI	District	Student	Student	Cost/	Cost/
	Index	Footage	Match %	SFR	MFR	SFR	MFR
Elementar	174.26	90	0.00%	0.183	0.096	\$0	\$0
Middle	174.26	117	0.00%	0.082	0.020	\$0	\$0
Sr. High	174.26	130	0.00%	0.108	0.034	\$0	\$0
				<b>TOTAL</b>		<b>\$0</b>	<b>\$0</b>
<b>Tax Payment Credit:</b>						SFR	MFR
Average Assessed Value						\$265,588	\$89,257
Capital Bond Interest Rate						4.86%	4.86%
Net Present Value of Average Dwelling						\$2,064,815	\$693,929
Years Amortized						10	10
Property Tax Levy Rate						\$0.9300	\$0.9300
Present Value of Revenue Stream						\$1,920	\$645
<b>Fee Summary:</b>				Single	Multiple		
				Family	Family		
Site Acquisition Costs				\$0.00	\$0.00		
Permanent Facility Cost				\$5,629.24	\$2,953.05		
Temporary Facility Cost				\$0.00	\$0.00		
State Match Credit				\$0.00	\$0.00		
Tax Payment Credit				(\$1,920.28)	(\$645.35)		
<b>FEE</b>				<b>\$3,709</b>	<b>\$2,308</b>		
<b>FEE WITH DISCOUNT OF 50%</b>				<b>\$1,854</b>			
<b>FEE WITH DISCOUNT OF 50%</b>					<b>\$1,154</b>		

APPENDIX B  
STUDENT GENERATION RATES

## Michael J. McCormick FAICP

Planning Consulting Services • Growth Management • Intergovernmental Relations

March 30, 2009

### Memorandum

To: Ron Cowan  
Bellingham School District

From: Mike McCormick

Re: Bellingham S.D. 2009 Student Generation Rates (SGR)

This memorandum contains the 2009 Student Generation Rates (SGR) for both single family and multiple family residential development for the Bellingham School District.

The methodology used to produce these rates is consistent with the methodology previously developed and successfully applied for a number of school districts in western Washington, including previous analysis prepared for the Bellingham School District and other Whatcom County school districts. The rates have been calculated for single family and multiple family residential development. The survey area included all of the territory within the boundary of the Bellingham School District. The analysis is based on residential projects constructed between 2004 through 2008. The primary sources of information are the Whatcom County Assessor's Office and the school district.<sup>1</sup>

The analysis involved comparing current student addresses with the street address for all residential development from 2004 through 2008. The addresses of each of these developments was matched with student addresses from the 2008-2009 school year. This data was aggregated to show the number of students in each of the grade groupings for each type of residential development. The SGR were calculated on a 100% sample of all single and multi-family residential development constructed between 2004 and 2008.<sup>2</sup>

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<sup>1</sup> The data provided by the county contained a variety of information including parcel number, street address, year built, and a identification number which reveals type of residential structure. The school district provided data containing the street address and grade level for each student.

<sup>2</sup> Identified multiple family projects developed for college students or for seniors (55+) which characteristically do not produce any students were excluded from the analysis.

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Bellingham School District 2009 Student Generation Rates

March 30, 2009

Page 2

The analysis is built on a comparison of the street addresses of the new developments with the current street addresses of each of the district's students from the 2008-2009 school year which produces a record of each unit occupied by a student. This information was aggregated into the three grade groupings and produced student generation rates for single family and multiple family. The resulting calculations are presented below and in a summary table attached to this report. The attached summary tables include individual grade counts of students by residential type and the total number of units in each type. A summary of the results are presented in the following table.

	Single Family	Multiple Family
Elementary (K-5)	0.183	0.096
Middle (6-8)	0.082	0.020
High (9-12)	0.109	0.034
Total <sup>3</sup>	0.374	0.151

Attachment: Table— Bellingham School District Student Generation Rates--2009

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<sup>3</sup> Totals may not balance due to rounding.