

MERCER ISLAND SCHOOL DISTRICT NO. 400

**SIX-YEAR CAPITAL FACILITIES PLAN
2022 – 2028**



Mercer Island School District No. 400 hereby provides to the City of Mercer Island this Capital Facilities Plan documenting the present and future school facility requirements of the District. The Plan contains all elements required by the State of Washington's Growth Management Act, including a six (6) year financing plan component.

Adopted on June 24, 2021

MERCER ISLAND SCHOOL DISTRICT NO. 400

2020-2026
SIX-YEAR CAPITAL FACILITIES PLAN

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For information about this plan, call the District Business Services Office
(206) 236-3295

Mercer Island School District No. 400
Mercer Island, Washington
(206) 236-3330

Board of Directors

	<u>Position Number</u>	<u>Term</u>
Deborah Lurie, President	4	12/2017 - 12/2021
Maggie Tai Tucker, Vice-President	3	12/2019 - 12/2023
David D'Souza	1	12/2019 - 12/2023
Brian Giannini Upton	2	12/2017 - 12/2021
Tam Dinh	5	12/2019 - 12/2023

Central Office Administration

Superintendent	Donna Colosky
Assistant Superintendent of Learning Services	Fred Rundle
Chief Financial and Operations Officer	Tyrell Bergstrom

Mercer Island School District No. 400
Mercer Island, Washington

Administration Building

4160 86th Ave. SE
Mercer Island, WA 98040
(206)236-3300
Donna Colosky, Superintendent

Mercer Island High School

9100 SE 42nd
Mercer Island, WA 98040
(206) 236-3350
Walter Kelly

Lakeridge Elementary

8215 SE 78th
Mercer Island, WA 98040
(206) 236-3415
Heidi Christiansen, Principal

Islander Middle School

8225 SE 72nd
Mercer Island, WA 98040
(206) 236-3413
Mary Jo Budzius, Co-Principal
Aaron Miller, Co-Principal

West Mercer Elementary

4141 81st Ave
Mercer Island, WA 98040
(206) 236-3430
Carol Best, Principal

Island Park Elementary

5437 Island Crest Way
Mercer Island, WA 98040
(206) 236-3410
David Hoffman, Principal

Northwood Elementary

4030 86th Ave
Mercer Island, WA 98040
(206) 236-3330
Aimee Batliner-Gillette, Principal

Section 1 - Executive Summary

The Mercer Island School District and the City of Mercer Island share identical boundary lines. This Six-Year Capital Facilities Plan (the "Plan") has been prepared by the Mercer Island School District (the "District") as the organization's primary facility planning document, in compliance with the requirements of the State of Washington's Growth Management Act. This plan was prepared using data available in spring of 2021 and is consistent with prior capital facilities plans adopted by the District. However, it is not intended to be the sole plan for all of the organization's needs.

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

The District's Plan establishes a "standard of service" in order to ascertain current and future capacity. This standard of service is reflective of current Student/Teacher Ratios (STR) that the District hopes to be able to maintain during the period reflected in this Capital Facilities Plan. With the introduction of the COVID-19 pandemic, the need for additional space and staffing to meet physical distancing requirements has been significant. This might necessitate further staffing and classroom space to reduce class size (STR) further. The District will continue to make budgetary decisions to attempt to protect class size (STR) through reductions in other programs and services when needed. Future state and other funding shortfalls could likewise impact future class sizes (STR).

It should also be noted that although the State Superintendent of Public Instruction establishes square foot guidelines for capacity funding criteria, those guidelines do not account for the local program needs in the District. The District has made adjustments to the standard of service based on the District's specific needs.

In general, the District's current standard provides the following (see Section 2 for additional information):

School Level	Target Class Size
Elementary	24 Students
Middle	26 Students
High	28 Students

School capacity is based on the District standard of service and use of existing inventory. Existing inventory includes both permanent and relocatable classrooms (i.e. portable classroom units). The District's current (2020-21) overall permanent capacity is 4,729 students (with an additional 182 student capacity available in portable classrooms). October enrollment for the 2020-21 school year was 4,060 students, and is projected to decrease by 3.75%, to 4,111 by October of 2024.

Historically, approximately 25% of the student enrollment growth on the Island is the result of the King County Growth Management Act and policy choices for high density development in the Town Center. The City of Mercer Island is anticipating significant further development within the Town Center as a result of commitments under the Growth Management Act. The

other 75% of growth comes from redevelopment of property (in many cases occurring where existing lots are subdivided and several new homes are constructed) and from a higher rate of homes being sold by seniors to a younger population that is just starting or might already have young families.

The district passed a bond issue in February 2014 for \$98.8 million dollars. The bond issue was designed to fund three targeted facility projects to address past overcrowding in Mercer Island Schools and to provide permanent capacity for the future growth of the student population over the next ten years. These bonds enabled the district to build a fourth elementary school (Northwood Elementary) and expand Islander Middle School with twelve classrooms for basic education and special education programs. In addition, the bonds provided for the addition of ten classrooms at Mercer Island High School, in order to provide adequate space for basic education and special education programs; and allow for STEM (science, technology, engineering and math), with a focused delivery of instruction.

The current projected downward trend in enrollment is driven in part by rising home prices, slumps in the birthrates in King County and migration of families with school age children to less expensive neighborhoods other than Mercer Island. Additionally, a 6% decline in enrollment can be directly traced the COVID-19 pandemic and matches state and national trends in enrollment decline. Long range demographic projections show a recovery of enrollment growth in the last 4 year of the 2020-2030 time range, but they do not exceed existing permanent capacity.

Section 2 - Current District "Standard of Service"

Mercer Island School District has established a "standard of service" 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 the 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; thus, the permanent capacity of some of the buildings housing these programs has been reduced in order to account for those needs. The standard of service has been updated to incorporate class size reduction at the K-3 level as outlined in House Bill 2242, which was passed in June 2017 and was effective in the 2020-21 school year.

Standard of Service for Elementary Students

- Average target class size for grades K - 3: 17 students
- Average target class size for grades 4 - 5: 27 students
- Special Education for students with disabilities may be provided in a self-contained classroom. Average target class size: 10 students

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

- Resource rooms
- Computer rooms
- English Language Learners (ELL)
- Education for disadvantaged students (Title I)
- Gifted education (Hi-C)
- District remediation programs
- Learning assisted programs
- Severely behavior disordered
- Transition room
- Mild, moderate and severe disabilities
- Preschool programs
- Before and After School Day Care Programs

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, the need for teachers to have a work space during their planning periods, and due to the fact that the same number of sections or classes is required every period. In addition, the district is in the process of building classrooms to meet the demand of development over the next five to seven years. Based on actual utilization due to these considerations, the district has determined a standard utilization rate of 95% for elementary schools.

Standard of Service for Secondary Students

- Average target class size for grades 6 – 8: 26 students
- Average target class size for grades 9 – 12: 28 students
- Special Education for students with disabilities may be provided in a self-contained classroom. Average target class size: 10 students

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

- English Language Learners (ELL)
- Computer rooms
- Education for disadvantaged students (Title I)
- District remediation programs
- Learning assisted programs
- Resource rooms (for special remedial assistance)
- Severely behavior disordered
- Mild, moderate and severe disabilities
- Transition room

Room Utilization at Secondary Schools

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, the need for teachers to have a work space during their planning periods, and due to the fact that the same number of sections or classes is required every period. One example is a period when band or orchestra is offered and over 100 students can be taken out of the mix; this can reduce the demand on the number of classrooms required. Based on actual utilization due to these considerations, the district has determined a standard utilization rate of 95% for the elementary schools, 86% for the Middle School and 90% for the High School.

Section 3 – Inventory and Evaluation of Current Permanent Facilities

The District's current permanent capacity is 4,729 students. The current enrollment on October 1, 2020 was 4,060 students or 659 students less than permanent capacity. Student enrollment is expected to decline by an additional 8% over the next six years. The District has front-funded and completed projects at the elementary, middle school and high school levels to provide capacity for enrollment growth over the next six to ten years. In addition, the Washington State Legislature has implemented the reduction of student/teacher ratios at grades K-3 to 17:1 in the 2020-21 school year. This Plan incorporates these reduced student/teacher ratios. In future Plan updates, the District will continue to update any facilities changes required if the Legislature funds and implement these reduced student/teacher ratios.

Calculations of elementary, middle, and high school capacities have been made in accordance with the current standards of service. Due to changes in instructional programs, student needs (including special education) and other current uses, some changes in building level capacity have occurred at some schools. An inventory of the District's schools arranged by level, name, and current permanent capacity are summarized in the following table.

Inventory of School Facilities and Permanent Capacity (2020-21)*

Facility	Grade Span	Permanent Classroom Capacity @ 100%	Special Education Capacity	Total Permanent Capacity @ 95%, 86%, 86%	Oct. 1, 2020 Enrollment	Over (Short) Permanent Capacity
Elementary Schools (Permanent Capacity)						
Island Park Elementary	K - 5	432	10	420	361	59
Lakeridge Elementary	K - 5	480	0	456	405	51
Northwood Elementary	K - 5	480	10	466	420	46
West Mercer Elementary	K - 5	480	0	456	372	84
Total Elementary Capacity		1,872	20	1,797	1,558	239
Middle School (Permanent Capacity)						
Islander Middle School	6 - 8	1,508	20	1,314	1,023	291
High School (Permanent Capacity)						
Mercer Island High School	9 - 12	1,792	20	1,631	1,472	159
Total District Capacity (EL 95% MS 86%, HS 90%)		5,172	60	4,742	4,053	689

* For Details on Use of Portables see Appendix D

Section 4 - Relocatable Classrooms

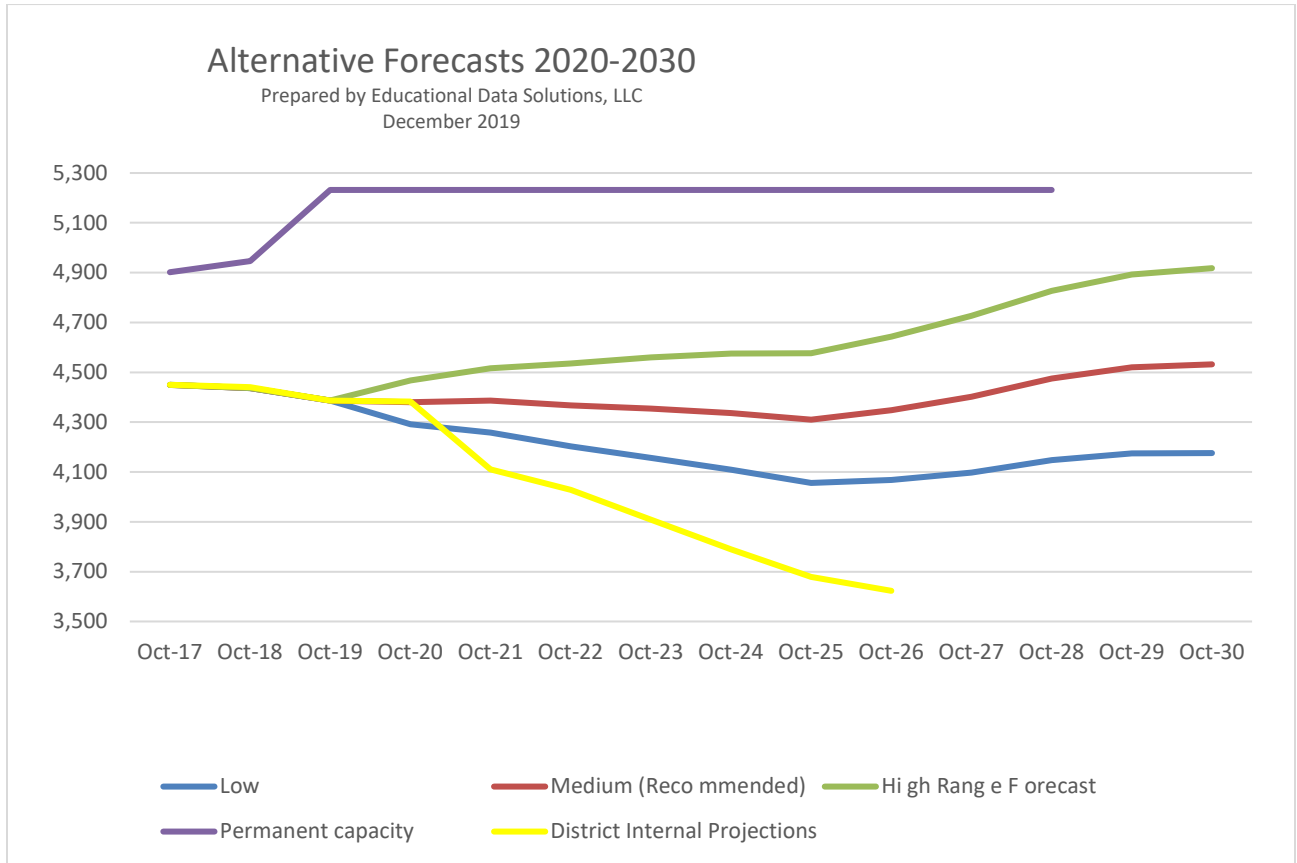
As of 2021-22 the District's inventory of classrooms will include 10 portable classrooms at the elementary level to provide standard capacity and special program space as outlined in Section 2. See Appendix D. The District inventory of portables will provide approximately 4.8% of capacity district-wide when required by enrollment growth and/or legislative action to reduce class size.

As enrollment fluctuates, relocatables provide flexibility to accommodate immediate needs and interim housing. Because of this, new and modernized school sites are all planned to accommodate the potential of adding relocatables to address temporary fluctuations in enrollment. In addition, the use and need for relocatables will be balanced against program needs. Relocatables are not a solution for housing students on a permanent basis, and the District would like to reduce the percentage of students that are housed in relocatable classrooms.

The cost of relocatables also varies widely based on the location and intended use of the classrooms. Currently, two of the portables in our inventory are not intended for regular classroom use and have not been included in the capacity to house student enrollment.

Section 5 – Six Year Enrollment Projections

The District enrollment projections are based on historic growth trends, future building plans and availability, birth rates, as well as economic and various other factors that contribute to overall population growth. Based on these projections, enrollment is anticipated to decrease by approximately 400 students over the next six years. This represents a decrease of 9.2% over the current student population.



Section 6 - Six-Year Plan for Housing Students

Applying the enrollment projections, current capacity, and added capacity from recent construction projects discussed in previous sections above, the following table summarizes permanent and portable projected capacity to serve our students during the periods of this Plan.

The district passed a bond proposition for \$98.8 million dollars in February 2014 to address student overcrowding across the district and to provide space for additional growth over the next six to ten years. The bonds built one additional elementary school and provided additional permanent capacity at both the middle school (ten classrooms and two special education spaces) and high school (eight classrooms and two special education spaces). Our Six-Year Finance Plan includes the addition of portable classrooms through the 2023-24 school year. Within the projects covered by this Six-Year Plan, Mercer Island School District built capacity for future enrollment growth and the projects continue to have available capacity for that purpose.

Enrollment continues to grow all grade levels. While the additional elementary school and classroom additions at the middle and high school levels, along with portable capacity, will provide needed capacity for our District, there may be additional needs within the timeframe of the Plan. Future updates to the Plan will address this matter as necessary.

Projected Capacity to House Students

School Years	Base Years/Projects			Projections					
	2015-16	2016-17	2017-21	2021-22	2022-23	2023-24	2024-25	2025-26	2026-27
Permanent Capacity @100%	4356	4600	5218	5232	5232	5232	5232	5232	5232
Added Capacity @ 100%									
Elementary School (24)		400	24						
Middle School (26)		208							
High School (28)	244								
Total Permanent Capacity @ 100%	4600	5208	5242	5232	5232	5232	5232	5232	5232
Total Permanent Capacity @ 95%, 86%, 90% *		4719	4742	4742	4742	4742	4742	4742	4742
Portables @ 100% *		168	168	264	264	264	264	264	264
Portables @ 95%, 86%, 90% *		160	160	251	251	251	251	251	251
Total Capacity with Portables @ 95%, 86%, 90% *		4879	4902	4993	4993	4993	4993	4993	4993
Projected Enrollment Headcount **		4408	4387	4111	4028	3909	3790	3679	3679
Permanent Capacity (Surplus/Deficit) @ 95%, 86%, 90% *		311	355	631	714	833	952	1063	1063
Capacity with Portables (Surplus/Deficit) @95%, 86%, 90% *		471	515	882	965	1084	1203	1313	1314

* Capacity calculations are based on the 95% utilization for Elementary School, 86% utilization for Middle, and 90% utilization for High School (See Appendix D)

**2016-2020 Actual October 1st enrollment head counts

The number of planned portables may be reduced if permanent capacity is increased by a future bond issue. Alternatively the number of portables may increase as necessary to address capacity. Portables will be replaced with a permanent structure within 5 years.

Section 7 - Impact Fees and the Finance Plan

As the District is projecting that for the duration of the 6-year plan duration, enrollment will fall within the permanent capacity of existing building inventory, it has been determined that the District is unable to impose impact fees at this time.

The following information is for *historical context only*.

Rate Calculation

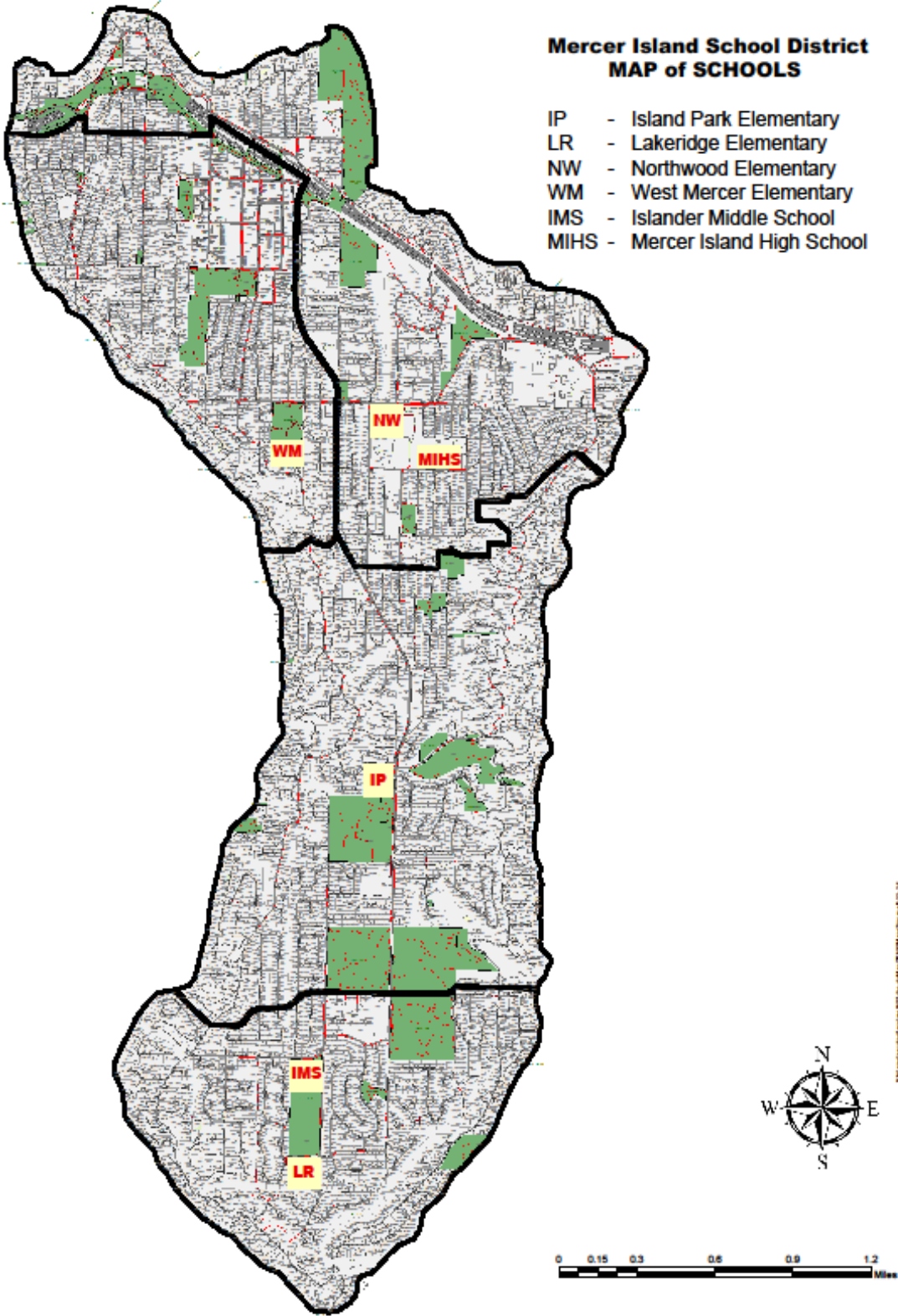
The school impact fee formula ensures that new development only pays for the cost of the facilities necessitated by new development. The following impact fee calculations examine the costs of housing the students generated by each new single family or multi-family dwelling unit. These are determined using student generation factors, which indicate the number of students that each dwelling produces based on recent historical data. The student generation factor is applied to the anticipated school construction costs (construction cost only, not total project cost), which is intended to calculate the construction cost of providing capacity to serve each new dwelling unit during the six year period of this Plan. The formula does not require new development to contribute the costs of providing capacity to address needs created by existing housing units.

The construction cost, as described above, is reduced by any state match dollars anticipated to be awarded to the District and the present value of future tax payments of each anticipated new homeowner, which results in a total cost per new residence of additional capacity during the six year period of this Plan.

If the District were able to impose impact fees, rate calculation tables would be found in Appendix A (Single Family Residence Rate) and Appendix B (Multi-Family Residence Rate).

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Appendix C

Projected Capacity to House Students (2021-22)

Elem. Schools (Capacity Utilization Factor)	# of Standard Classrooms *	Room Capacity (Elementary 24, Middle School 26, High School 28) **	# of Handicapped Classrooms (High Needs)	Handicapped Room Capacity (10)	Permanent Capacity @ 100%	Permanent Capacity @ 95%, 86%, 90%	# of Existing Portables	Portable Capacity @ 100%(24, 26, 28) **	Current School Capacity @ 95%, 86%, 90% (With Portables)	Current School Capacity @ 100% (With Portables)	Projected October 2019 Headcount	Permanent Capacity (Over of Short at 95%, 86%, 90%) ***	Capacity With Portables (Over of Short @ 95%, 86%, 90%) ****	
														95.0%
Island Park	18	432	1	10	442	420	2	48	46	490	466	422	(2)	44
Lakeridge	20	480	0	0	480	456	3	72	68	552	524	431	25	94
Northwood	20	480	1	10	490	466	2	48	46	538	511	428	37	83
West Mercer	20	480	0	0	480	456	4	96	91	576	547	456	(0)	91
Total Elementary	78	1872	2	20	1892	1797	11	264	251	2156	2048	1737	60	311
Middle Schools (Capacity Utilization Factor)														
Islander Middle Sch.	58	1508	2	20	1528	1314	0	0	0	1528	1314	1109	205	205
Total (Middle Sch.)	58	1508	2	20	1528	1314	0	0	0	1528	1314	1109	205	205
High Schools - (Capacity Utilization Factor)														
MI High School	64	1792	2	20	1812	1631	0	0	0	1812	1631	1536	95	95
Total (High School)	64	1792	2	20	1812	1631	0	0	0	1812	1631	1536	95	95
Total (All Schools)	200	5172	6	60	5232	4742	11	264	251	5496	4993	4382	360	611

* Excludes spaces for special program needs and services
 ** Average of staffing ratios: Elementary 24, Middle School 26, High School 28
 *** Permanent Capacity X Capacity Utilization Factor - (Minus) Projected October Headcount = Reflects the building's level of service design capacity
 **** Maximum Capacity with Portables x Capacity Utilization Factor - (Minus) Projected October Headcount Enrollment = Reflects the building's design capacity with portables