

**TOLEDO SCHOOL DISTRICT
CAPITAL FACILITIES PLAN**

2009-2015

BOARD OF DIRECTORS

Sandy Bray
Jerry Berrier
Bill Moore
Michelle Askin
Dale Koth

SUPERINTENDENT

Sharon Bower

**Adopted by the Toledo School Board
August 2009**

SECTION 1 INTRODUCTION

A. Purpose of the Capital Facilities Plan

The Washington State Growth Management Act (the “GMA”) includes schools in the category of public facilities and services. School districts adopt capital facilities plans to satisfy the requirements of the GMA and to identify additional school facilities necessary to meet the educational needs of the growing student populations anticipated in their districts. They also are used to support the imposition of school impact fees.

The Toledo School District (the “District”) has prepared this Capital Facilities Plan (the “CFP”) to provide Lewis County (the “County”) and the City of Toledo (“City”) with a schedule and financing plan for capital improvements over the next six years. This CFP also provides a long range facility need forecast based on county populations and housing projections.

This CFP contains the following elements, which satisfy GMA requirements:

- The District's standard of service, which is based on program year, class size by grade span, number of classrooms, types of facilities and other factors identified by the District.
- Future enrollment forecasts.
- An inventory of existing capital facilities owned by the District, showing the locations and capacities of the facilities, based on the District's standard of service.
- A forecast of the future needs for capital facilities and school sites based on the District's enrollment projections.
- The proposed capacities of expanded or new capital facilities over the next six years based on the inventory of existing facilities and the standard of service.
- A six-year plan for financing capital facilities within projected funding capacities, which clearly identifies sources of public money for such purposes. The financing plan separates projects and portions of projects that add capacity from those which do not, since the latter are generally not appropriate for impact fee funding.
- A calculation of impact fees to be assessed.

This CFP was developed using the following guidelines:

- The District used information from recognized and reliable sources.
- The District's facilities goal is to provide bricks and mortar schools facilities for all offered programs.
- The CFP complies with the GMA.
- The methodology used to calculate impact fees complies with the GMA and well established uniform criteria.

B. Overview of the Toledo School District

The Toledo School District is located east of the Interstate 5 corridor in Lewis County, halfway between Seattle and Portland. It encompasses approximately 130 square miles and is bordered by seven other districts including Mossyrock, Onalaska, Castle Rock, Winlock, Napavine, and Toutle Lake School Districts.

The district serves approximately 952 students in grades K-12. The district consists of one elementary school grades K-5, one middle school grades 6-8, and the high school grades 9-12. The district has not added any additional buildings since the mid 1970s, when it added the high school. The District did, however, add two classrooms to the high school in the summer of 2008. The middle school is the former high school. It was remodeled in 1996. There is limited ability to add space to this building. The elementary school was also remodeled in 1996, when three

classrooms and the gymnasium were added. In 2004 a kindergarten room was added. In 2008 two classes were added to the high school. At the present time, all classrooms are being fully-utilized including a portable classroom that is being used for music classes.

Toledo School District has been a school of choice for many non-resident students. Approximately 16% of enrolled students are Choice students that reside in surrounding districts. There is district policy in place with an enrollment cap on Choice students.

The City of Toledo is expanding its city limits and Urban Growth Area. This will allow additional housing per acre not presently allowed under the Lewis County Growth Management Act. There are several housing projects being planned for these UGA's. Included in these projects, is a low income housing development for the Cowlitz Indian Tribe.

The demographics of Toledo students is also changing. The special education and Bilingual student population is increasing each year, along with the extent of services needed to serve these growing populations.

The most significant issues facing the District in terms of facilities are:

- Modernizing the present high school and addressing the needs to support the Advance Placement program, math and science curriculum, and adding restrooms at the football facility.
- Modernizing the middle school, adding capacity for growth and improving the woodshop.
- Adding classrooms to the elementary school and high school for growth; and adding space for special education, pre-school, and an outside covered play area.
- Adding safety and security improvements, including lighting and fire alarm systems.
- Expansion of the office space in the district office and improvements to the bus garage including the addition of bus space and a transportation office.
- District is serving a significant number of students that do not live in the District, but elect to attend Toledo Schools under choice legislation.

SECTION 2 DISTRICT EDUCATIONAL PROGRAM STANDARDS

School facility and student capacity needs are dictated by the types and amounts of space required to accommodate the District's adopted educational program. The role that quality education plays in growing a strong local economy is vital. In order to accomplish the community value of having a strong local economy, schools must have quality facilities. These facilities serve as the supporting space for developing the whole child within a community to prepare them for a competitive global economy. The education program standards which typically drive needs for educational space for students include grade configuration, optimum facility size, class size, educational program offerings, supplemental program offerings, specialty spaces, classroom utilization and scheduling requirements.

In addition to student population, other factors such as collective bargaining agreements, government mandates, and community expectations affect classroom space requirements. Space is necessary for regular classrooms, the fine and performing arts, physical education, special education, Title I, Highly Capable, bilingual education, technological applications, computer labs, preschool and daycare programs, and other specialized programs. Space must be provided for common areas such as media centers, cafeterias, kitchens, and auditoriums. Space is needed for groups of students/staff to work together. These programs can have a significant impact on the available student capacity within school facilities. Further, the community expects all spaces to be well utilized during the school day and available after the school day for public use.

A. District Educational Program Standards:

Core program includes the following:

- Core classroom space for all curriculum areas which includes space for group learning, directed instruction, and individual student work to meet the rigors set forth in state standards.
- Science classroom space that supports advanced coursework (including water, sinks, gas, hoods, safety equipment). Students must achieve rigorous state mandated science standards. This requires specialty space that is not met by adding portables. High school and middle school science lab space is a high priority.
- Physical education space is needed too for students to meet rigorous health and fitness standards. This includes covered areas, fields, gymnasiums, and other multi-use spaces.
- Technological competency is expected for all students. Space must be allocated for technological equipment and applications in classrooms and specialty spaces. Square footage for this equipment and its infrastructure is not calculated in current state allowances, but must be provided.
- Art, music, and theatre arts spaces are critical to the core program for students. Spaces are necessary to adequately meet the rigorous standards of these state required programs.
- Library/Media services (research, technology, collaboration) and space must be provided for students to achieve the rigors in the core program. In information driven environment, student access to information through appropriately sized library/media spaces is essential.
- Extra-curricular activities need adequate space in order to safely support program activities.

Special services are essential to meet the needs of special populations. Toledo School District has

- Special Education services are delivered at each of the schools within the District. Program standards and services vary based on the handicapping conditions of the students and their individual education plan (IEP). Implementing each student's IEP often requires large and small specialty spaces, which the District must provide. Program standards change as a result of various external or internal influences. External influences include changing federal mandates, funding changes, and the introduction of new technological applications, which meet the needs of students. Internal influences include modifications to the program year, class size, grade configurations, and facility changes. In addition, the District is serving more high needs special education students that require smaller and more private teaching and learning spaces, as well as spaces to accommodate specialized equipment and additional staffing.
- Special populations receive special support. Specialty space is essential to delivery of this support. Federal and state programs, including Title 1 Reading and Math, Highly Capable, Bilingual, are limitedly funded. Since 2006, bilingual students in the district have increased from 4 to 22, which is 450%. These resources do not include the expense of adding facilities to support them.
- Early Childhood programs, such as all day kindergarten and preschool are essential educational programs to develop early childhood literacy skills, and vital to the community. These programs require specialty space, which is not funded by the state.
- Supplementary services in core academic areas (tutoring, on-line learning) and providing multiple pathways to prepare students for a broader range of post-secondary learning opportunities require additional spaces that have not been calculated in current state square footage allowance formulas.
- Support services are often overlooked core services, and are essential to a quality educational program. Food service delivery, storage, preparation, and service require spaces that are specialty designed and equipped also need specific attention. As student populations increase, calculating space needs for this core service is crucial to the overall

planning of the facility. Adequacy in planning for this space has significant impacts on the overall learning environment for students if not done appropriately.

- Transportation support centers are required to handle growing transportation needs.
- Maintenance support facilities must also be considered and are often overlooked as core support services.
- Administrative support facilities must also be considered and are often overlooked as core support services.

B. Elementary Educational Program Standards

The District educational program standards, which directly affect elementary school capacity, include:

- Class size for grades K-3 is targeted not to exceed 23 students per class.
- Class size for grades 4-5 is targeted not to exceed 25 students per class.
- Music will be provided in separate classrooms.
- Physical education instruction must be provided in a full size area.
- Special education services are provided in a self-contained classroom for some children, while others need highly specialized services.
- The elementary school classroom utilization standard is set at a factor of 85% (based on a regular school day).
- Title I/LAP programs require specialized areas similar to regular classrooms.
- All elementary schools will have a library/media resource center, which includes space for a technology lab.
- Computer labs will be available for all students.
- A specialized science lab for grades 4-6 will be available.
- Kindergarten is a full-day program, as opposed to the state funded 1/2 day program.

C. Middle and High School Program Standards

The district education programs standards, which directly affect middle school and high school capacity include:

- Class size for 6th grade is targeted not to exceed 25 students per class, with the exception of PE, music, or choir.
- Class sizes for grades 7-12 are targeted not to exceed 27 students per class with the exception of PE, music, choir, or other special pull-out programs.
- The middle and high school classroom utilization standard is set at a factor of 85% (based on a regular school day).
- Special education services are provided in a self-contained classroom for some children, while others need highly specialized spaces.

Students will also be provided other programs in classrooms designated as follows:

- Specialty rooms (computer labs, individual and large group study rooms, practice labs, production rooms).
- Media Central/Library
- Vocational education requires specialized spaces suited to the curriculum.

SECTION 3 CAPITAL FACILITIES INVENTORY

The facilities inventory establishes the baseline for determining the existing capacity in the school facilities and the need for additional capacity to serve future growth at acceptable levels of service.

This section provides an inventory of capital facilities owned and operated by the District including schools, portables, undeveloped land and support facilities. School facility capacity was inventoried based on the space required to accommodate the District's educational program standards discussed in Section 2.

A. Schools

The District currently maintains one elementary school, one middle school, and one high school. The elementary school accommodates grades K-5, the middle school serves grades 6-8 and the high school serves grades 9-12. The following tables show the location, size and capacity of the existing schools.

Table 1 – Elementary School Inventory

Elementary School	Location	Acres	Building Sq Ft	Teaching Stations*	Permanent Capacity **
Toledo Elementary School K-5	3116 S. 6 th Street Toledo WA 98591	9.20	35,512	18	363

* There are 12 K-3 teaching stations and six 4-5 teaching stations. Teachings stations do not include the special education room, LAP room, library, computer lab and science room because they are special/pull-out programs.

** Permanent capacity is calculated by multiplying the number of teaching stations times the students per classroom as defined in the educational standards, times a 85% utilization factor. The utilization factor is based on the amount of time during the day a regular classroom is not occupied by students.

Table 2 – Middle School Inventory

Middle School	Location	Acres	Building Sq Ft	Teaching Stations*	Permanent Capacity**
Toledo Middle School	155 N. 5 th Street Toledo WA 98591	8.60	44,588	10	223

* There are four 6th grade teaching stations and six 7-8 teaching stations. Teachings stations do not include rooms that are used for special education, LAP room, library, computer lab, science or other special/pull-out programs.

*** Permanent capacity is calculated by multiplying the number of teaching stations times the students per classroom as defined in the educational standards, times an 85% utilization factor. The utilization factor is based on the amount of time during the day a regular classroom is not occupied by students.

Table 3 – High School Inventory

High School	Location	Acres	Building Sq Ft	Teaching Stations	Permanent Capacity**
Toledo High School 9-12	1242 S.R. 505 Toledo WA. 98591	40.90	55,549	15	344

** Permanent capacity is calculated by multiplying the number of teaching stations times the students per classroom as defined in the educational standards, times an 85% utilization factor. The utilization factor is based on the amount of time during the day a regular classroom is not occupied by students.

B. Portables

Portable classrooms are used on an interim basis to house students until funding can be secured to construct permanent classrooms.

Table 4 – Portables Inventory

School	Portables	Interim Capacity
Toledo Elementary	1	990 sq. ft.

C. Support Facilities

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

Table 5- Support Facility Inventory

Facility	Sq Ft	Location
District Office/Records Storage	2,580	130 N. 5 th St
Softball Complex	3,744	1242 State Rt 505
Bus Garage	3,200	126 Collins Rd
Covered Play Area	2,400	311 S. 6 th St
Covered Play Area	3,900	155 N. 5 th St

D. Land Inventory

The District does not own any additional land.

**SECTION 4
STUDENT ENROLLMENT PROJECTIONS**

A. Projected Student Enrollment

The District considered information from various sources in forecasting its enrollment.

The District considered the Office of the Superintendent of Public Instruction’s (OSPI’s) short term enrollment forecast based on cohort survival. The cohort survival forecast is determined by looking at the number of live births in the county and historical grade progression. It is a conservative forecasting methodology that does not take into account land supply and local development. In the past, the District has not found this method of forecast enrollment reliable; it has understated student enrollment. The OSPI enrollment forecast also is limited in that it only forecasts enrollment out to the year 2014.

Given the limitations associated with OSPI’s forecast, the District forecast its student enrollment for the year 2025 by using the percentage of the Lewis County population that is currently enrolled in K-12 schools in the District and the 2025 population the County allocated to the urban and rural areas in the District. The 2025 student enrollment forecast based on population allocations assumes the same percentage of the population that is currently enrolled will be enrolled in 2025.

The District also considered the number of students that would be generated from new housing that can be built on urban and residential lands if those lands are built out by the year 2025. Currently, there are .405 students living in new houses that are built in the District. The 2025 student forecast

based on forecast housing assumes the same number of students will be living in new houses built between now and the year 2025.

The District also looked at its historical growth of approximately 2% a year and forecast enrollment in 2015 assuming growth occurs at 2% a year.

Table 6 shows the low, medium and high enrollment forecast for 2015 and the net increase.

Table 6 – Enrollment Forecast

2008 Enrollment	Low	Med	High	Forecast Growth
952	848	991	1,110	Low <104> Med 39 High 158

As reflected above, the District could see declining enrollment or its enrollment may grow somewhere between 39 and 158 students. Because the District has not seen a significant decline and wants to be prepared to serve the potential growth, the District's Capital Facility Plan assumes growth will occur. To adequately plan facilities for forecast growth, the District's Capital Facility Plan is based on the medium forecast growth, or 991 students for a net increase of 39 students in grades K-12. The forecast assumes population and housing the County is planning for will occur at the equal and consistent rate between now and 2025.

Table 7 below shows the District's current capacity, current enrollment, and the forecast enrollment in 2015. As shown in the table, the District has a current need to add capacity for 22 students and that need is expected to grow to approximately 61 unhoused students by the year 2015.

Table 7 – Enrollment, Capacity and Needs

Facility	Current Enrollment	Current Capacity	Current Needs*	2015 Enrollment	2015 Needs**
Total	952	930	22	991	61

* Current needs equal current enrollment minus current capacity.

** 2015 needs equal 2015 enrollment minus current capacity.

B. Long Range Forecast

In addition to forecasting an enrollment of 991 students by the year 2015, the District has forecast enrollment out to the year 2025. Using county population and housing data, in 2025 the District expects an enrollment of approximately 1,200 students, or an increase of approximately 250 students. The forecast is based on medium growth using population and housing data to forecast student enrollment.

SECTION 5 CAPITAL FACILITIES NEEDS

A. Facility Needs

The primary need in the District is a complete renovation and modernization of the high school. In addition, the District needs to add capacity to serve an additional 61 students. Because the high school currently

serves a number of unhoused students and is in need of reconstruction, the District will accommodate the additional capacity by adding three classrooms at the high school. The need for additional classrooms is based on the District's current capacity, its educational programs, standard of service and enrollment forecast. More specifically, the facility needs for 61 students was determined by subtracting 2008 capacity from current and forecast enrollment. The capacity in 2008 is shown in tables 1, 2 and 3. Enrollment is shown in Table 6. Table 7 lists the Districts enrollment, capacity and needs. As shown in the table, the District needs to add capacity to serve 61 students by 2015 (22 that are currently enrolled plus an additional 39). Using the District's standard of 27 students per high school class, the District needs to add three classrooms to serve 61 (or more) students.

B. Planned Improvements

This CFP contemplates a complete renovation of the high school with the addition of three classrooms, which will expand capacity to serve future growth. The District may also evaluate grade reconfigurations and the use of the existing buildings when the high school is renovated to ensure capacity is provided at the correct grade levels.

Table 8 shows the planned facility improvements, the capacity that will be added when the improvements are constructed, how much capacity is available to serve forecast growth, the cost for the added capacity and that portion of the cost that is being incurred to serve forecast growth. Since the District currently needs to capacity for 22 students, only a portion of the cost to build additional school capacity will be available for growth. It is the amount of the total capacity that is being added (three classroom, which is capacity for 69 students, minus the existing need for 22 students). The costs to add capacity that are allocated to growth take this into account.

Table 8 – Facility Improvements and Cost

Facility Improvements	Additional Capacity	Capacity for Growth*	Cost**	Cost Attributed to Growth**
High School	69	47	\$20,084,448	\$2,285,639
Portables	0(temp)	0(temp)	\$280,000	\$0
Total	69	47	\$20,364,448	\$2,285,639

* Capacity for growth is the total additional capacity (69) minus the existing need (22).

** Based on architects estimate.

*** Cost attributed to growth equals 47 times the cost per student for the planned improvements.

Facility needs are expressed in terms of "unhoused students" or students that cannot be housed in permanent (brick/mortar) facilities under the Districts program standards. Unhoused students receive basic education in portable classrooms. In order to serve "unhoused students" on a short-term and immediate basis to serve growth, the District will need to purchase and utilize portable classrooms. The cost of portables is not included in the impact fee calculation; however, impact fee revenue can be available to fund portable facilities if these facilities are needed to serve growth.

C. Planned Capacity

The District has capacity to serve 930 students (363 elementary, 223 middle school and 344 high school). When the high school is modernized and expanded, the District will have capacity to serve 999 students. The District's forecast enrollment in 2015 is 991. The planned improvements will provide sufficient capacity to serve the forecast growth.

**SECTION 6
CAPITAL FACILITIES FINANCING PLAN**

A. Improvements

Based on 2015 enrollment projections, the District should have adequate facilities to meet student needs. However, in looking ahead to 2025, anticipated long-term growth may necessitate the construction of additional facilities to house all enrolled students.

B. Financing for Planned Improvements

1. General Obligation Bonds

Bonds are typically used to fund construction of new schools and other capital improvement projects. A 60% voter approval is required to approve the issuance of bonds. Bonds are then retired through collection of property taxes. The District will need to pass a bond to finance the improvements in this Plan.

2. State Match Funds

State match funds come from the Common School Construction Fund (“the fund”). Bonds are sold on behalf of the Fund, and then retired from revenues accruing predominantly from the sale of timber from the common school lands. If these sources are insufficient, the Legislature can appropriate funds or the State Board of Education can change the standards. School Districts may qualify for state match funds for specific capital projects based on a prioritization system. Based on the District’s assessed valuation per student and the formula in the state regulations, the District is eligible for state match for improvements that add capacity at the elementary school. The District may be eligible for a portion of the costs to modernize the high school.

3. Impact Fees

Impact fees are a means of supplementing traditional funding sources for construction of public facilities needed to accommodate new development. School impact fees are generally collected by the permitting agency at the time plats are approved or building permits are issued. Only a small portion of the costs for the improvements at the elementary and middle school are eligible for impact fees; the remaining costs are needed to remedy existing deficiencies (add capacity for unhoused students and to modernize all the facilities).

Should the district need to additional facilities, the financing components include a bond issue, state match and impact fees.

4. Six-Year Financing Plan

Table 9 demonstrates how the District intends to fund the facility improvements and portables identified in this CFP. The financing components include a bond issue, state match and impact fees. The District will not qualify for state match until it has received the voters’ approval of a bond issue, which is not likely to occur until 2011 or later.

Table 9 - Capital Facilities Financing Plan

Total Cost	Secured Financing			Unsecured Financing		
	Bonds	State Match	Impact Fees	Bonds	State Match*	Impact Fees**
\$20,364,448	\$0	\$0	\$0	\$11,292,834	\$8,715,464	\$356,150

* This number is an estimate of state match and is subject to verification by OSPI.

** This number is an estimate based on forecast growth and the recommended fee per single family home.

Projects and portions of projects which remedy existing deficiencies are not appropriate for impact fee funding. Thus, impact fees will not be used to finance projects or portions of projects which do not add capacity. Impact fees also cannot (and will not) be used for the operation, maintenance or repair, of existing facilities.

SECTION 7 SCHOOL IMPACT FEES

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

A. School Impact Fees

To collect school impact fees the District must prepare and adopt a CFP meeting the specifications of the GMA and county or city ordinances that implement the GMA. The impact fees are calculated in accordance with a local jurisdiction's formula, which are based on school facility costs that are incurred to serve new growth and that are contained in the District's CFP.

B. Methodology and Variables Used to Calculate School Impact Fees

The District's impact fees have been calculated utilizing the widely used formula that includes credits for state match and property taxes as well as a 15% discount to ensure new development does not pay more than its fair share of the cost for schools that serve the development. Because the District will not receive state match for the acquisition of the school site, and did not receive state match for the portion of the costs it incurred to construct expanded facilities (only received state match for modernization) credit is not provided for state match. The resulting figures in the attached Appendix A are based on the District's cost to build schools, per dwelling unit, using the District's student generation rate.

C. Proposed Toledo School District Impact Fee Schedule

The calculated school impact fee amount for single family units is \$ 4,192.

The Board of Directors is requesting collection of school impact fees from every new single family home in the following amount: \$2,096.

Multi-family housing units have not been built in the District in the last five years. The District has not adopted a multi-family school impact fee but will amend this CFP to include a multi-family school impact fee when multi-family development occurs.