

# State Assistance for School Construction

## A Case Study: Evergreen School District Union High School



# Evergreen School District Bond Election History 1990 - 2007

ELECTION DATE	PASSED	FAILED	% YES
2/90	\$9,765,000		64.67%
11/91		\$19,875,000	54.05%
2/92	\$19,875,000		61.88%
2/94	\$47,980,000		60.87%
2/96		\$68,700,000	48.17%
5/96		\$68,700,000	56.94%
5/97		\$69,700,000	52.69%
3/98		\$64,550,000	54.90%
2/99	\$40,000,000		60.80%
5/02	\$167,930,000		65.07%

# Bond 2002

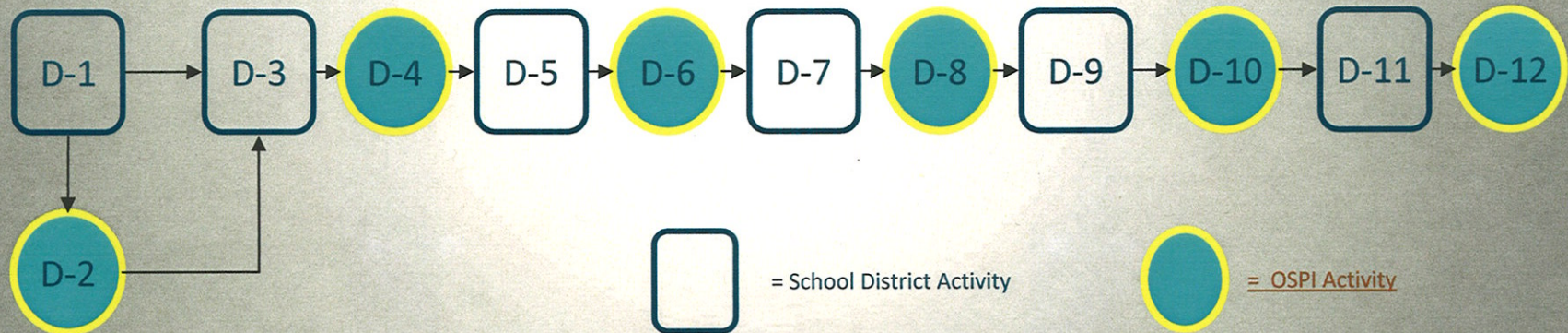
## Six Year Capital Needs

	Year 1	Year 2	Year 3	Year 4	Year 5	Year 6
<b>Growth Based</b>						
<b>Construction</b>						
Elementary 1		\$11,845,000 (2)				
Elementary 2					\$12,640,000 (3)	
High School	\$45,554,000 (1)					
Portables (4)	\$1,000,000	\$1,025,000	\$1,051,000	\$1,077,000	\$1,104,000	\$1,131,000
Elem Site 1	\$1,250,000					
Elem Site 2				\$1,346,000		
MS Site					\$2,715,000	
HS Site	\$6,250,000					
(1) 2,725 Unhoused Students		(3) 819 Unhoused Student				
(2) 652 Unhoused Students		(4) Portables (20 classrooms)				
		per year				

## Evergreen School District – Union High School Project Milestones



Planning Grant	Project Approval <small>(1/31)</small>	Preliminary Funding <small>(1/31)</small>	Secured Funding <small>(6/30)</small>	Construction Contracts	Release Retainage
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Received D-3(s) 1/04	D-4(s) Approved 3/04	D-4 Change In Scope Increased SF 3/05	D-5 Received 3/05	D-6 Approved 3/05	D-7 Received 6/30/05	D-8 Approved 7/18/05	D-9 Received 8/11/05 8/24/05	D-10 Approved 8/24/05	D-11	D-12
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# Evergreen Study and Survey

- **State Assistance starts with Planning**
  - The Study and Survey (Grant available \$40,617)
  - Unique to each district
    - 12 chapters including:
      - inventory
      - planning
      - local funding ability
      - demographics
      - need to improve school administrative units and attendance areas among or within districts
      - other pertinent matters

# Evergreen School District 2004 Existing Inventory

STATE OF WASHINGTON  
SUPERINTENDENT OF PUBLIC INSTRUCTION  
OLYMPIA

REPORT NO. 3  
R/JN ON 11:27 NOV 29 '04

FACILITIES BUILDING SECTION KK LINEAR PROJECTION  
INVENTORY OF PERMANENT SCHOOL FACILITIES FOR THE 2004 SCHOOL YEAR  
TO BE UPDATED FOR THE 2005 SCHOOL YEAR PAGE

EVERGREEN DISTRICT NO. 114 CLARK COUNTY NO. 08

BLDG NO.	NAME	GRADE SPAN	TOTAL		P O O K		BUILDING SQ.FT.AREA	ADJUSTED SQ.FT.AREA	CAPACITY		PROJECTED UNHOUSED				
			T/S HDQP	T/S REGULAR	T/S HDQP	T/S REGULAR			HDQP	REGULAR	2005	2006	2007	2008	2009
2829	HILL PLAIN E	K-5	4	25	59,545	0	0	0	48	549					
2912	ORCHARDS ELE	K-5	4	22	61,656	0	0	0	48	687					
3148	ELLSWORTH EL	K-5	4	18	38,174	0	0	0	48	391					
3149	SIFTON ELEME	K-5	2	15	43,282	0	0	0	24	499					
3818	MARION ELEM	K-5	3	22	48,158	0	0	0	36	438					
3736	BURTON ELEME	K-5	1	21	41,382	0	0	0	12	498					
3822	CRESTLINE EL	K-5	3	14	43,955	0	0	0	36	487					
3823	SILVER STAR	K-5	4	20	43,085	0	0	0	48	455					
3270	SUNSET ELEME	K-5	3	21	58,650	0	0	0	36	845					
3971	FIRCHREST ELE	K-5	4	21	56,650	0	0	0	48	824					
3964	IMAGE FLEMEN	K-5	2	25	66,650	0	0	0	24	688					
3965	RIVERVIEW EL	K-5	4	21	66,650	0	0	0	48	624					
4163	HEARTHWOOD E	K-5	3	22	51,350	0	0	0	36	579					
4249	BURNT BRIDGE	K-5	3	22	61,579	0	0	0	36	581					
4300	HARMONY ELEM	K-5	3	22	61,529	0	0	0	36	581					
4445	PIONEER ELEM	K-5	4	22	51,529	0	0	0	48	500					
4499	FISHER'S LAN	K-5	2	20	51,977	0	0	0	24	608					
4560	D LAHEE ELEM	K-5	2	20	58,827	0	0	0	24	601					
4679	YORK ELEMENT	K-5	2	25	57,265	0	0	0	24	573					
4567	COLUMBIA WLV	K-5	3	25	61,656	0	0	0	36	708					
SPAN TOTAL			68	427	1,024,648	0	0	0	720	11,568	85-	248	633	987	1337
3328	COVINGTON JUN	6-8	6	34	118,553	0	0	0	72	1,085					
3785	GASCADE JUNI	6-8	7	29	118,550	0	0	0	84	1,068					
4051	NYEAST JUNI	6-8	7	39	117,127	0	0	0	84	1,054					
4209	PACIFIC JUNI	6-8	5	31	87,568	0	0	0	60	892					
4488	FRONTIER JR	6-8	6	35	101,846	0	0	0	72	910					
4561	SHAKALA MIDD	6-8	4	35	106,018	0	0	0	48	983					
SPAN TOTAL			38	203	637,952	0	0	0	420	5,082	574-	565-	172-	58	218
2724	EVERGREEN HT	9-12	11	65	227,214	0	0	0	132	1,739					
4102	MTN VIEW HIG	9-12	11	77	229,915	0	0	0	132	1,754					
4523	HERITAGE HIG	9-12	17	65	227,457	0	0	0	144	1,727					
SPAN TOTAL			34	207	683,666	0	0	0	408	5,220	2500	2642	2779	2968	3270
4204	CLARK CO VOC	VC	0	14	57,264	0	0	0	0	488					
SPAN TOTAL			0	14	57,264	0	0	0	0	488	409-	409-	409-	409-	409-
REG TOTAL										29,188	1232	2117	2831	3606	4436
LESS HDQP									1,548		1548-	1548-	1548-	1548-	1548-
DIS TOTAL											310-	369	1283	2058	2888

# Evergreen K-12 Linear Cohort Enrollment Projection

STATE OF WASHINGTON  
SUPERINTENDENT OF PUBLIC INSTRUCTION  
OLYMPIA

REPORT NO. 1049  
RUN ON 11:34 NOV 29 '04

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

EVERGREEN	DISTRICT NO. 114 CLARK		COUNTY NO. 08				AVER. % SURVIVAL	P R O J E C T E D E N R O L L M E N T S					
	1999	2000	2001	2002	2003	2004		2005	2006	2007	2008	2009	2010
KINDERGARTEN	1,622	1,634	1,738	1,788	1,844	1,891		1,944	2,000	2,053	2,105	2,159	2,211
GRADE 1	1,710	1,721	1,800	1,872	1,960	2,016	110.11	2,082	2,145	2,202	2,261	2,318	2,377
GRADE 2	1,898	1,750	1,822	1,930	1,913	2,006	101.71	2,050	2,118	2,182	2,240	2,300	2,359
GRADE 3	1,670	1,768	1,734	1,838	1,855	1,902	102.29	2,052	2,097	2,157	2,232	2,291	2,353
GRADE 4	1,770	1,725	1,825	1,813	1,877	1,995	102.34	2,005	2,100	2,145	2,216	2,284	2,345
GRADE 5	1,762	1,825	1,772	1,865	1,834	1,928	102.42	2,043	2,057	2,151	2,199	2,272	2,335
GRADE 6	1,363	1,819	1,858	1,816	1,882	1,917	102.42	1,975	2,002	2,107	2,208	2,261	2,327
K-6 HEADCOUNT	11,819	12,372	12,727	12,934	13,274	13,715		14,158	14,609	15,008	15,456	15,876	16,311
K-6 W/K 2 1/2	11,006	11,526	11,858	12,048	12,352	12,770		13,184	13,638	13,982	14,405	14,787	15,206
GRADE 7	1,586	1,598	1,526	1,474	1,470	1,095	100.88	1,020	1,047	2,105	2,120	2,216	2,266
GRADE 8	1,577	1,615	1,638	1,866	1,879	1,870	102.04	1,934	1,968	2,028	2,148	2,183	2,261
7-8 HEADCOUNT	3,163	3,213	3,164	3,340	3,749	3,765	5.82	3,954	3,956	4,133	4,268	4,372	4,528
GRADE 9	1,525	1,009	1,703	1,727	1,441	1,911	108.02	1,927	1,003	2,828	2,089	2,213	2,220
GRADE 10	1,495	1,530	1,631	1,708	1,691	1,896	100.07	1,912	1,828	1,994	2,028	2,090	2,215
GRADE 11	1,684	1,763	1,778	1,821	1,909	1,925	114.27	2,167	2,136	2,203	2,279	2,319	2,388
GRADE 12	1,472	1,539	1,698	1,795	1,937	2,005	89.87	1,922	2,104	2,182	2,200	2,276	2,318
9-12 HEADCOUNT	6,196	6,471	6,800	7,049	7,376	7,737		7,928	8,270	8,407	8,597	8,835	9,148
K-12 HEADCOUNT	21,171	22,048	22,931	23,727	24,341	25,217		25,948	26,834	27,546	28,323	29,153	29,985

+ 57  
25,274

# State's Contribution to School Construction is based on the following funding formula.

$$\text{State Assistance} = \text{Eligibility} \times \text{Area Cost Allowance} \times \text{Match Ratio}$$

## New Construction

Future Need - Existing Capacity

State Square Foot Allocation

K-6	90 square feet per student
7-8	117 s.f. / student
9-12	130 s.f. / student
"Students w Disabilities"*	144 s.f. / student

## Building Modernization/ Replacement Age

Before 1993 = 20 yrs

After 1993 = 30 yrs

Major mod > 40% up to 100% of ACA

Determined By

Legislature

Current Formula

2002	\$110
2003	\$125
2004	\$129
2005	\$142
2006	\$154
2007	\$162.43
2008	\$168.79

Level of Match Relates to Wealth in District

Local Assessed Land Value per Pupil compared to State Average Value per Pupil.

Additional percentage points for School District growth.



# Evergreen School District Eligibility Calculation for a New High School

EVERGREEN SCHOOL DISTRICT NO. 114, CLARK COUNTY  
New Union High School

ANALYSIS OF EXISTING FACILITIES				ENROLLMENT (HEADCOUNT)		
Grade Level	Class-rooms	Sq. Ft. Area	Capacity	Oct. 1, 2004	Projections 2009 - 2010	No. Unhoused 2009 - 2010
K-5	427	923,849	11,548	11,483	12,997	1,449
Hdcp.	60	100,800	720	372	628	(92)
Total		1,024,649	12,268	11,855	13,625	1,357
6-8	203	599,132	5,991	5,380	6,325	334
Hdcp.	35	58,800	420	302	305	(115)
Total		657,932	6,411	5,682	6,630	219
9-12	207	626,546	5,221	7,247	8,488	3,267
Hdcp.	34	57,120	408	490	410	2
Total		683,666	5,629	7,737	8,898	3,269
District Totals			24,308	25,274 4.61%	29,153	4,845

## ELIGIBILITY CALCULATION:

K-5	1,039,760	9-12	1,018,560	
6-8	632,500	Hdcp.	57,120	34
Hdcp.	78		1,075,680	
	1,803,300		(683,666)	Less 9-12 inventory
	(1,024,649)	Less K-5 inventory	392,014	sq. ft. unhoused eligibility
	(657,932)	Less 6-8 inventory	(234,946)	new Union High @ D-4
	120,719	sq. ft. unhoused	(40,000)	Health academy @ D-4
			(15,000)	Evergreen High Ad @ D-4
			102,068	sq. ft. unhoused available

# Evergreen School District Matching Ratio

- History (noting applicable year used for Union High School)

1997	1998	1999	2000	2001	2002	2003	2004	2005	2006	2007
64.16%	63.73%	63.74%	65.66%	67.02%	70.15%	69.72%	69.11%	69.59%	68.85%	65.88%

# Evergreen School District Matching Ratio

## 2002 MATCHING RATIO CALCULATION

BASIC MATCH RATIO + TOTAL GROWTH POINTS = TOTAL MATCHING RATIO

ENROLLMENT			
October 1998	October 2001	2001 Adj. Assessed Valuation	Adj. Assessed Valuation Per Pupil
19,206.73	21,821.10	\$7,563,295,748	\$346,604.70
STEP 1	$3 - \frac{\$346,604.70}{\$556,285.32}$		$3 + \frac{\$346,604.70}{\$556,285.32}$
STEP 2	$(3 - .62)$		$(3 + .62)$
STEP 3	$2.38$		$3.62$
	$= 65.61\% \text{ BASIC MATCH RATIO}$		

### GROWTH POINTS:

$$21,821.10 - 19,206.73 = 2,614.37$$

$$2,614.37 / 3 = 871.46$$

$$871.46 / 19,206.73 = 4.54\% \text{ TOTAL GROWTH POINTS}$$

$$\text{STEP 4} \quad = 70.15\% \text{ TOTAL MATCH RATIO}$$

# Evergreen School District Union High School State Funding by Category

**FORM D-10  
AUTHORIZATION TO SIGN CONTRACTS  
WITH SECURED FUNDING STATUS**

The D-10 is notification that the Office of Superintendent of Public Instruction has received and approved the school district Application for Authorization to Sign Contracts (D-9). The district is authorized to sign contracts for construction. This project has a commitment that state funds are available. **NOTE:** Only costs for special inspections and testing as specified in the uniform building code are matchable. Costs included on Form D-10 are based on estimates only—state matching funds will be reimbursed on actual costs for those tests certified to be conducted during construction.

If you have any questions regarding this project, please contact your regional coordinator.

**PROJECT INFORMATION**

Project Name:	New East High School Campus	Building No.:	4604
School District:	Evergreen No. 114	County:	Clark
Address:	PO Box 8910	Contact Person:	Reg Martinson
City:	Vancouver	Telephone:	(360) 604-4077
Zip Code:	98668-8910	Fax:	(360) 604-4112
		E-Mail:	martins@egreen.wednet.edu

**APPROVED PROJECT INFORMATION**

Project No: 345-H03-38037 under provision of Chapter 488, Laws of 2005

New Construction:	234,900	sf	Area Cost Allowance:	\$141.95
Modernization:	0	sf	Grade Span:	9-12
New-in-Lieu of Mod:	0	sf	2002 State Match Ratio Applied:	70.15%
			Equipment % allowance:	4.00%

**FINANCIAL ANALYSIS — Based on data from the D-9 —**

	NEW CONSTRUCTION	MODERNIZATION	NEW-IN-LIEU
TOTAL AREA:	234,900	0	0
EXCESS AREA:	0	0	0
CONSTRUCTION COST:	\$45,813,744.00	\$0.00	\$0.00
MATCHABLE TAX	\$3,206,962.08	\$0.00	\$0.00
TOTAL COST:	\$49,020,706.08	\$0.00	\$0.00
COST/SF:	\$208.69	\$0.00	\$0.00

Matchable Tax Rate:	7.00%	Local Tax Rate:	0.70%
A/E Fee New Construction:	2,190,872	Ed. Spec. Cost:	10,000
A/E Fee Modernization:	0	Value Eng. Cost:	40,623
A/E Fee New-in-Lieu:	0	Constr. Review Cost:	32,560
Construction Management Cost:	252,139	Bldg. Commis. Cost:	162,212
		Energy Report Cost:	12,000
		GA Energy Review:	2,000

	PROJECT TOTAL	=	STATE SHARE	+	LOCAL SHARE
1. New Construction:	\$33,344,055.00		\$23,390,854.58		\$9,953,200.42
2. New Construction Excess:	\$15,676,651.08		.....		\$15,676,651.08
3. Cost Savings Incentive:	.....		\$0.00		\$0.00
4. Modernization Cost:	\$0.00		\$0.00		\$0.00
5. Modernization Excess:	\$0.00		.....		\$0.00
6. New-in-Lieu Construction Cost:	\$0.00		\$0.00		\$0.00
7. New-in-Lieu Excess:	\$0.00		.....		\$0.00
8. Tax Excess:	\$320,696.21		.....		\$320,696.21
<b>SUBTOTAL</b>	<b>\$49,341,402.29</b>		<b>\$23,390,854.58</b>		<b>\$25,950,547.71</b>

School District: Evergreen  
Project Name: New East High School Campus

	PROJECT TOTAL	=	STATE SHARE	+	LOCAL SHARE
<b>SUBTOTAL (from Page 1)</b>	<b>\$49,341,402.29</b>		<b>\$23,390,854.58</b>		<b>\$25,950,547.71</b>
9. A/E Fee New Construction Matchable:	\$2,000,643.30		\$1,403,451.27		\$597,192.03
10. A/E Fee New Construction Excess:	\$190,228.70		.....		\$190,228.70
11. A/E Fee Modernization Matchable:	\$0.00		\$0.00		\$0.00
12. A/E Fee Modernization Excess:	\$0.00		.....		\$0.00
13. A/E Fee New-in-Lieu Matchable:	\$0.00		\$0.00		\$0.00
14. A/E Fee New-in-Lieu Excess:	\$0.00		.....		\$0.00
15. Construction Management Matchable:	\$252,139.00		\$176,875.51		\$75,263.49
16. Construction Management Excess:	\$0.00		.....		\$0.00
17. Educational Specifications Matchable:	\$10,000.00		\$7,015.00		\$2,985.00
18. Educational Specifications Excess:	\$0.00		.....		\$0.00
19. Value Engineering Matchable:	\$40,623.00		\$28,497.03		\$12,125.97
20. Value Engineering Excess:	\$0.00		.....		\$0.00
21. Constructability Review Matchable:	\$32,560.00		\$22,840.84		\$9,719.16
22. Constructability Review Excess:	\$0.00		.....		\$0.00
23. Building Commissioning Matchable:	\$133,376.22		\$93,563.42		\$39,812.80
24. Building Commissioning Excess:	\$28,835.78		.....		\$28,835.78
25. Energy Report Matchable:	\$10,000.00		\$7,015.00		\$2,985.00
26. Energy Report Excess:	\$2,000.00		.....		\$2,000.00
27. GA Energy Report Review Fee:	\$2,000.00		\$1,403.00		\$597.00
<b>SUBTOTAL</b>	<b>\$52,043,808.29</b>		<b>\$25,131,515.65</b>		<b>\$26,912,292.64</b>
28. Inspection and Testing ESTIMATE New:	\$84,973.00		\$59,608.56		\$25,364.44
29. Inspection and Testing ESTIMATE Mod:	\$0.00		\$0.00		\$0.00
30. Insp/Testing ESTIMATE Nonmatchable:	\$0.00		.....		\$0.00
31. Equipment Allowance-New or New-in-Lieu:	\$1,333,762.20		\$935,634.18		\$398,128.02
32. Equipment Allowance-Modernization:	\$0.00		\$0.00		\$0.00
33. Nonmatchable Construction:	\$0.00		.....		\$0.00
34. Other Nonmatchable Components:	\$48,740.71		.....		\$48,740.71
<b>TOTAL PROJECT COST</b>	<b>\$53,511,284.20</b>		<b>\$26,126,758.39</b>		<b>\$27,384,525.81</b>

**CONTRACT INFORMATION**

**ARCHITECTURAL AND ENGINEERING SERVICES:**

Firm Name: LSW Architects  
Address: 2300 Main Street, Vancouver 98660  
Telephone: (360) 694-8571  
Fax: (360) 694-9510

**CONSTRUCTION MANAGEMENT SERVICES:**

Firm Name: Evergreen School District - Reg Martinson / Susan Steinbrenner / Raelynn Good / Lynn Grolbert  
Address: 13501 NE 28th Street, PO Box 8910, Vancouver 98668-8910  
Telephone: (360) 604-4077  
Fax: (360) 604-4112

**GENERAL CONTRACTOR:**

Firm Name: Todd Construction **Total Contract Amount: \$45,859,000**  
Address: 18407 SW Boones Ferry Rd, Tigard OR 97224  
Telephone: (503) 620-7652  
Fax: \_\_\_\_\_

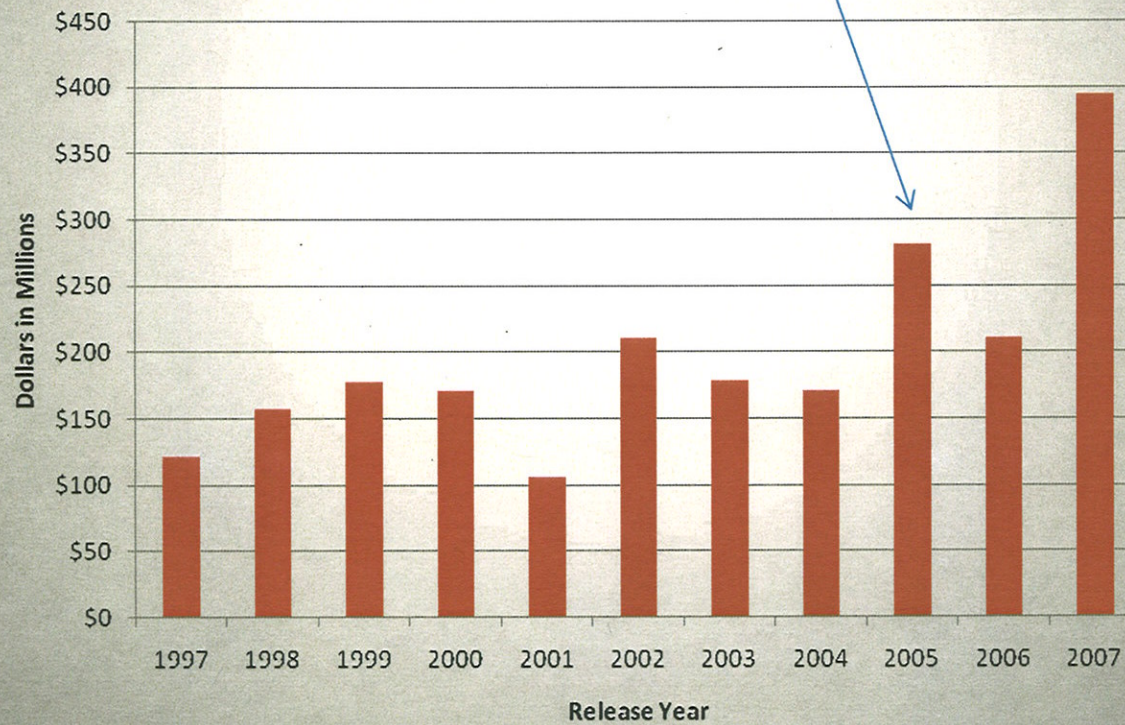
**ART GRANT:** \$125,955.62

SUPERINTENDENT OF PUBLIC INSTRUCTION

Approval Date: August 24, 2005

# Release of State Funds by Year

*New Union High was part of the 2005 Release*



# 2005 Project Release List in Priority Rank Order

## SCHOOL CONSTRUCTION ASSISTANCE PROGRAM 2005 PROJECT PRIORITY RANKING

DISTRICT	PROJECT	Project Total Score
1 Evergreen 114	New East High (Union)	78.05
2 North Kitsap 400	New Kingston High	77.83
3 Yelm 2	New Ridgeline Middle	77.74
4 Aberdeen 5	Aberdeen High Repl (N/L)	62.74
5 Highline 401	New Mount Rainier High (N/L)	60.92
6 Ocean Beach 101	Hilltop Mid Repl (N/L)	57.22
Ocean Beach 101	Hilltop Mid Mod	57.22
7 Zillah 205	Hilton El Repl (N/L)	56.50
Zillah 205	Hilton El Mod	56.50
8 Richland 400	Richland High Repl (N/L)	55.20
Richland 400	Richland High Mod	55.20
9 Richland 400	Hanford High Repl (N/L)	54.46
Richland 400	Hanford High Mod	54.46
10 Newport 56-415	Sadie Halstead Mid Mod	54.27
11 North Beach 64	New Ocean Shores El (N/L)	53.01
12 Tacoma 10	Fern Hill El Repl (N/L)	52.44
Tacoma 10	Fern Hill El Mod	52.44
13 Mukilteo 6	Explorer Mid Mod (Bldg 3)	52.08
14 Lake Washington 414	Rose Hill El Repl (N/L)	50.79
15 Everett 2	Eisenhower Mid Repl (N/L)	50.21
Everett 2	Eisenhower Mid Mod	50.21
16 Spokane 81	Lincoln Heights El Repl (N/L)	50.10
17 Everett 2	Emerson El Mod	49.55
18 Puyallup 3	Fruitland El Ad	49.53
19 North Kitsap 400	Poulsbo Jr High Bldg #1 Mod	49.46
20 Bethel 403	New Spanaway Jr High	48.69
21 West Valley 363	West Valley High Ad	47.91
West Valley 363	West Valley High Mod	47.91
22 Peninsula 401	Harbor Ridge Mid Repl (N/L) Phase 2	47.63
23 Sunnyside 201	New Sierra Vista Middle	47.33
24 Tumwater 33	Peter G Schmidt El Repl (N/L)	47.28
Tumwater 33	Peter G Schmidt El Mod	47.28
25 Spokane 81	Ridgeview El Repl (N/L)	46.51
26 Snoqualmie Valley 410	Mount Si High Gym Mod	45.82
27 Spokane 81	Lidgerwood El Repl (N/L)	44.41
28 Kent 415	Kent Jr High Repl (N/L)	43.40
Kent 415	Kent Jr High Mod	43.40
29 Tacoma 10	Wilson High Repl (N/L)	42.54
30 Vancouver 37	Eisenhower El Repl (N/L)	42.03
31 Evergreen 114	Evergreen High Ad	35.83
Evergreen 114	Evergreen High Mod	35.83
32 Bellevue 405	New Medina El (N/L)	32.33
33 Lake Washington 414	Emily Dickinson El Repl (N/L)	32.32
34 Camas 117	Camas Mid Repl (N/L)	31.23
Camas 117	Camas Mid Mod	31.23
35 Granite Falls 332	Granite Falls High Ad	29.12
Granite Falls 332	Granite Falls High Mod	29.12
36 Bellevue 405	Newport High Repl (N/L)	22.17
Bellevue 405	Newport High Mod	22.17

**New Construction**

25 Points Maximum
5 Points Maximum
5 Points Maximum
55 Points Maximum

Common Factors

No. of Years Unhoused

Mid-Range Projection

Projected % Unhoused  
 If % unhoused is  $\geq 40\%$  = 55 pts.  
  
 If % unhoused is  $< 5\%$ , min. = 15 pts.  
  
 If % unhoused is between 5 – 40%, the remaining 40 pts. Are proportionally awarded.

Total = 90 Points Maximum

**Modernization**

25 Points Maximum
30 Points Maximum
20 Points Maximum

1. Type of Space  
 Instructional = 10 pts. max  
 Support = 7 pts. max  
 General = 4 pts. max
2. Local Priority = 5 pts. max
3. Joint Funding = 5 pts. max
4. Modified School Calendar = 5 pts. max

Building Condition Score

If building score is 31 or less, 30 points are awarded.

If building score is 91 or more, 0 points are awarded.

If building score is between 31-91, points are awarded proportionally.

Health and safety up to 16 pts.

Plus 2 pts. for failure to meet seismic code.

Plus 2 pts. for asbestos presence.

Total = 75 Points Maximum

# BUILDING CONDITION EVALUATION FORM

County/School District \_\_\_\_\_

School Name \_\_\_\_\_

Building Name/# \_\_\_\_\_

COMPONENTS	SYSTEMS	RATINGS					COMMENTS
		GOOD (1)	FAIR (2)	POOR (3)	UNSAT. (4)	COMBINED	
1.0 Exterior Building Condition  Component Score	1.1 Foundation/Structure	+12	+8	+6	+4		
	1.2 Walls	+8	+5	+3	+1		
	1.3 Roof	+7	+5	+2	0		
	1.4 Windows/Doors	+2	+1	0	0		
	1.5 Trim	+2	+1	0	0		
2.0 Interior Building Condition  Component Score	2.1 Floors	+8	+5	+2	0		
	2.2 Walls	+8	+5	+1	0		
	2.3 Ceilings	+5	+3	+1	0		
	2.4 Fixed Equipment	+2	+1	0	0		
3.0 Mechanical Systems Condition  Component Score	3.1 Electrical	+6	+4	+2	0		
	3.2 Plumbing	+4	+2	+1	0		
	3.3 Heating	+6	+4	+2	+1		
	3.4 Cooling	+6	+4	+2	+1		
	3.5 Lighting	+4	+3	+2	0		
4.0 Safety/Building Code  Component Score	4.1 Means of Exit	+6	+4	+2	0		
	4.2 Fire Control Capability	+4	+3	+2	+1		
	4.3 Fire Alarm System	+4	+3	+2	+1		
	4.4 Emergency Lighting	+2	+1	0	0		
	4.5 Fire Resistance	+4	+3	+2	+1		
TOTALS							
5.0 Provisions for Handicapped		X	X	X	X		
Suitability Code and Definition (Circle Appropriate Code)	4 Building makes positive contribution to educational environment 3 Building suitable 2 Current use of space is compatible with intendend use but needs remodeling 1 Current use of space is not compatible with intendend use or design						
Significant Location Factors / Overall Conclusions							
Evaluator Signature _____	Date	Unadjusted Score	Adjusted Score				
School Official Signature _____							



EVERGREEN SCHOOL DISTRICT  
NEW UNION HIGH SCHOOL (per square foot costs)

- July 2005 Release -

12/01-5/02 Planning/Election	3/04 Project Approval D-3 / D-4	6/05 Bid D-7 / D-8	8/05 Construction Start D-10	9/07 Occupancy	% Increase since Planning
---------------------------------	---------------------------------------	--------------------------	------------------------------------	-------------------	---------------------------------

Total project cost with property				\$289.38	\$306.33	
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Total project cost w/o property	\$198.00			\$256.10	\$273.19	37.97%
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State matched items (70.15% match ratio)	\$131.38	\$148.30	\$157.96	\$158.55		20.68%
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73.05% increase

EVERGREEN SCHOOL DISTRICT  
NEW UNION HIGH SCHOOL (per square foot costs)

- July 2005 Release -

12/01-5/02 Planning/Election	3/04 Project Approval D-3 / D-4	6/05 Bid D-7 / D-8	8/05 Construction Start D-10	9/07 Occupancy	% Increase since Planning
---------------------------------	---------------------------------------	--------------------------	------------------------------------	-------------------	---------------------------------

Construction cost + 7.0% sales tax	\$150.00	\$173.85	\$208.69	\$207.77	38.51%
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Area cost allowance	\$115.00	\$129.51	\$141.95	\$141.95	23.43%
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# Summary Evergreen Union High School

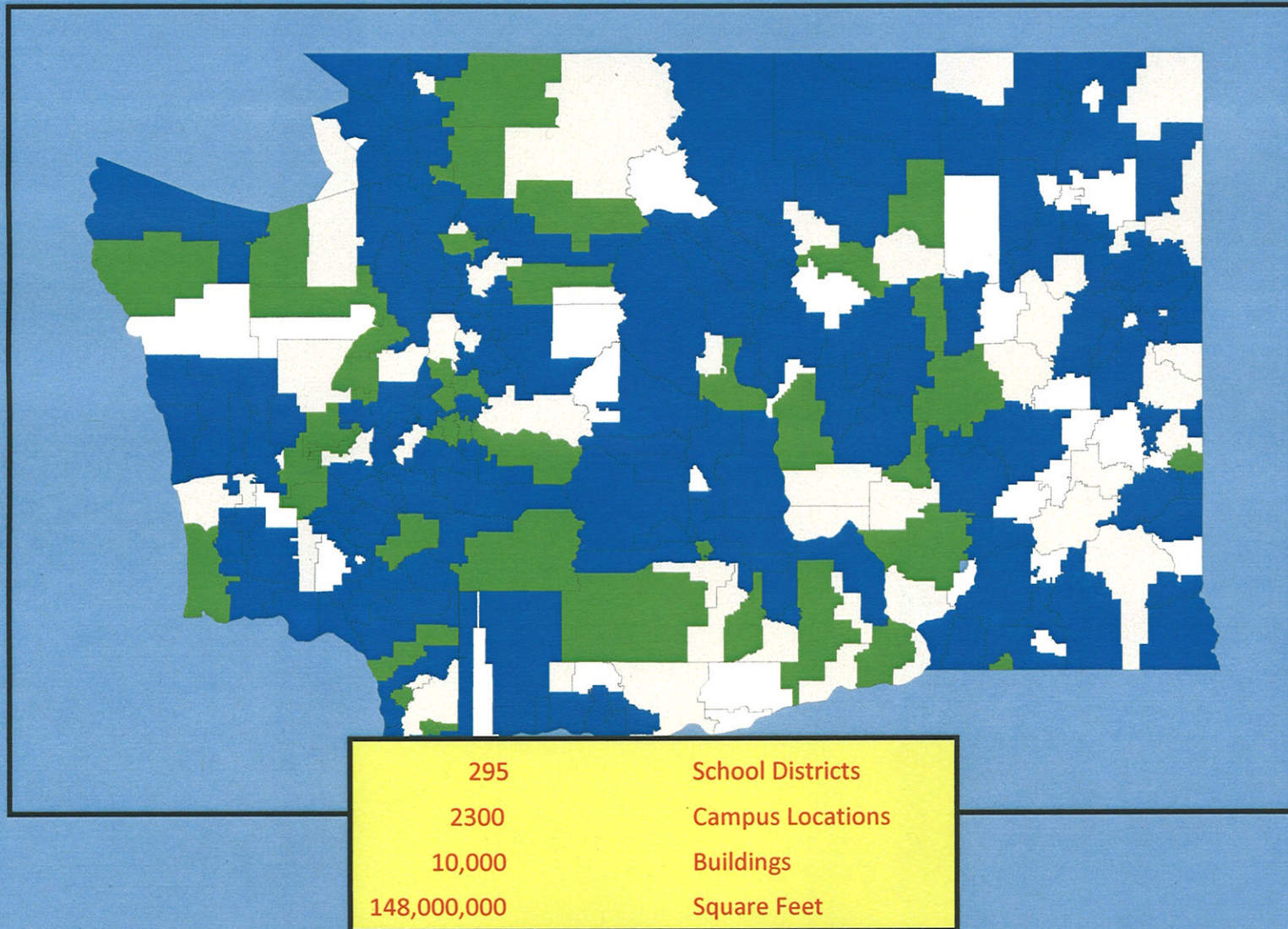
- 7 years Bond Planning to Occupancy
- \$64,448,000 = Total Project Cost (\$72,265,000 with Property)
- \$38,321,000 = Local Cost (without property) = 59.46%
- \$26,126,000 = State Cost = 40.54%
  
- 2725 Unhoused Students @ Bond planning
- 1600 Union High School Design
  
- 1703 Today Unhoused Students (projected 2012 enrollment )

# School Construction Assistance in Washington

(focus on expenditures)

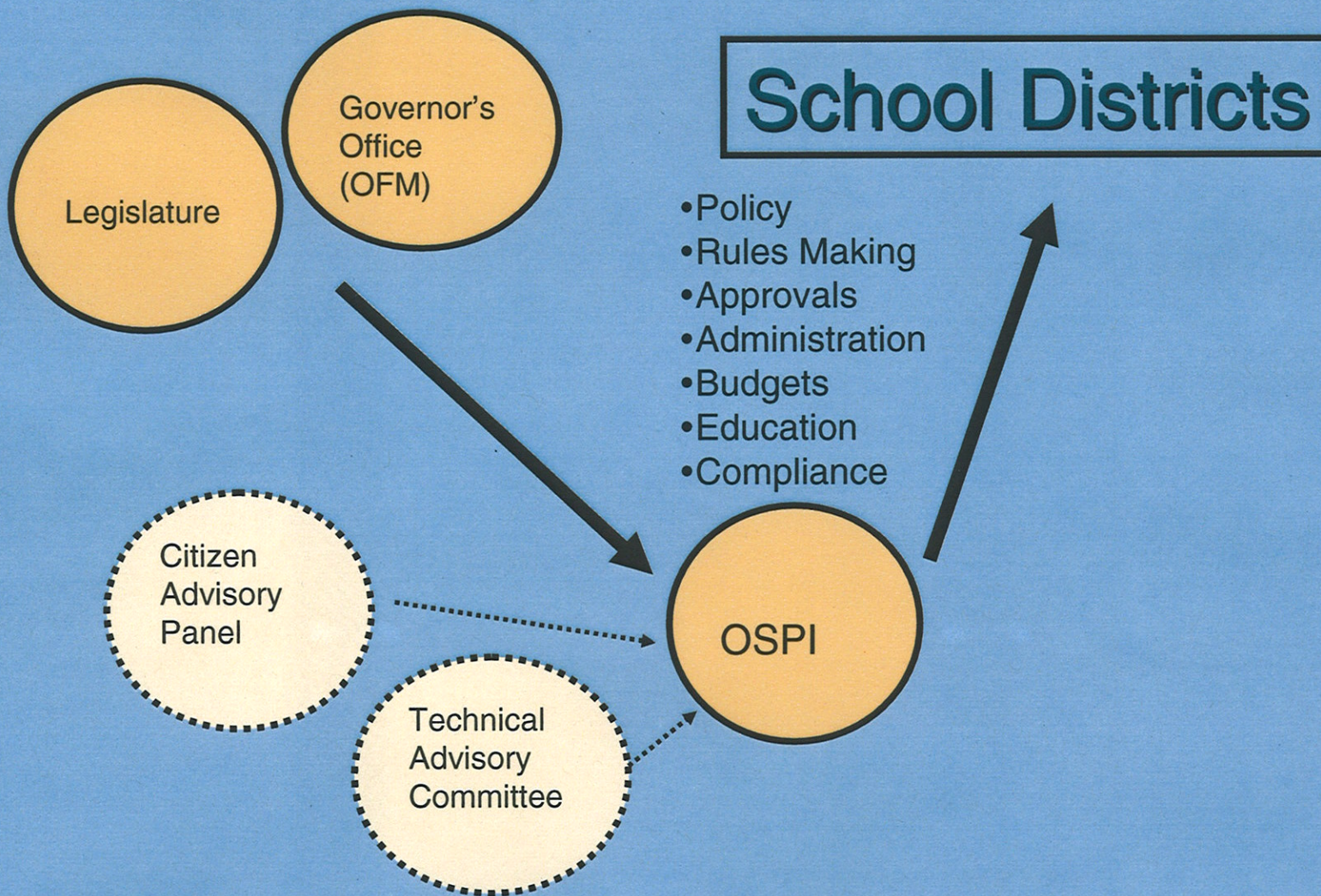


# Washington State School Districts



# Governance Relationships and Funding Process

- Funding
- Legislative Authority



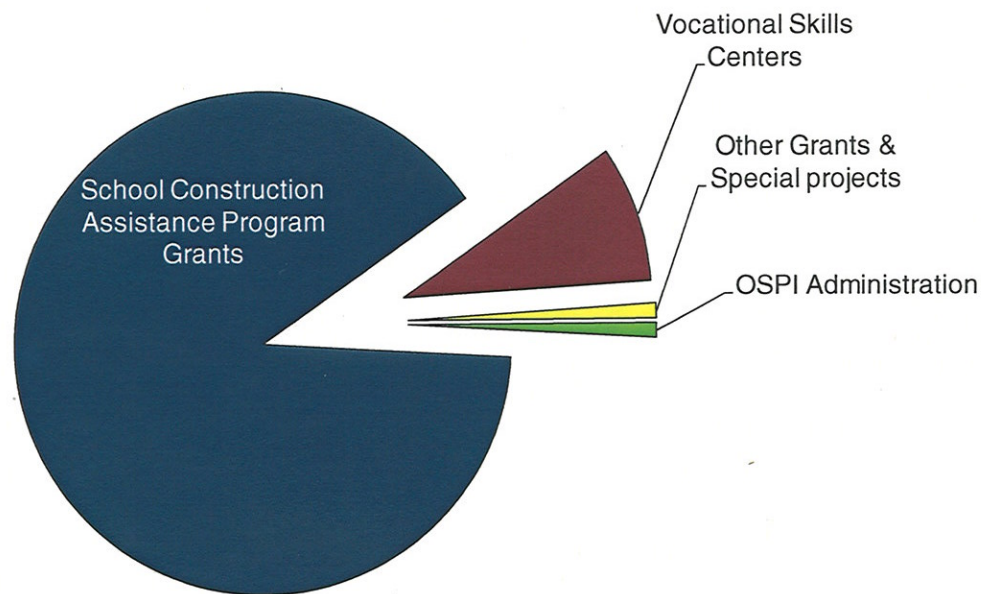
# Office of Superintendent of Public Instruction

## School Facilities and Organization

- Furnish school districts financial and technical assistance in connection with building programs and planning facilities.
  - Regional coordinator services
- Provide support for school district organization issues.

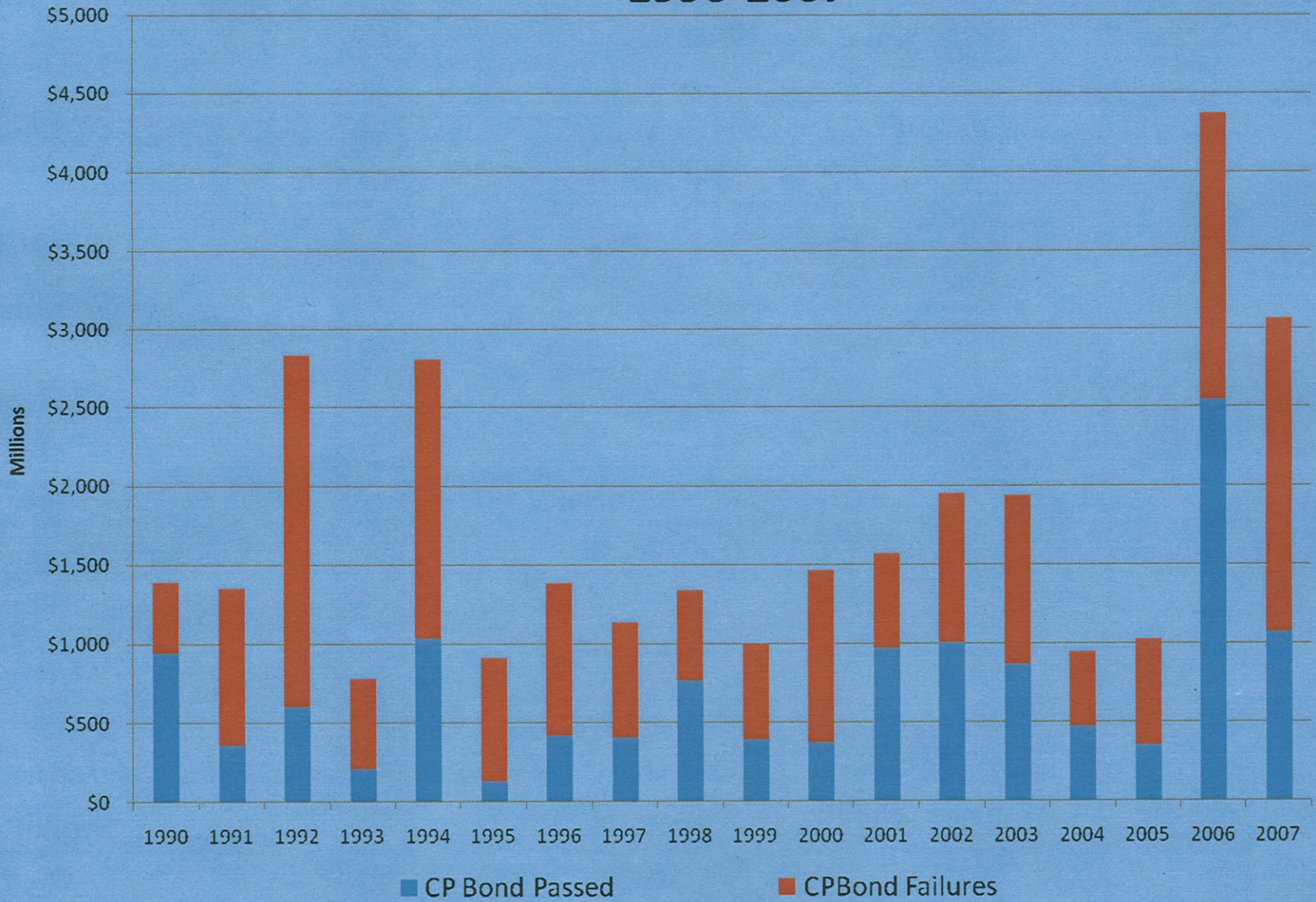
The K-12 capital budget has historically funded only major construction through the “School Construction Assistance Program”

2007 - 2009 OSPI Capital Budget

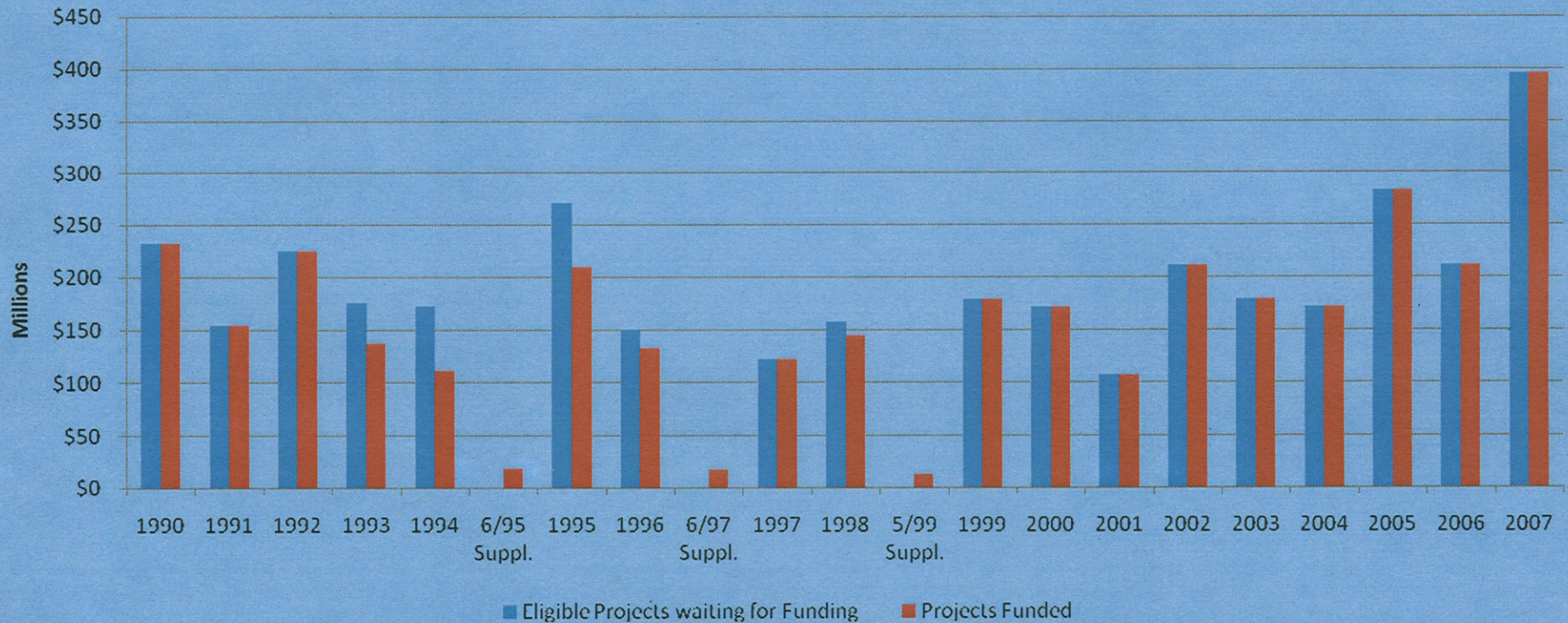




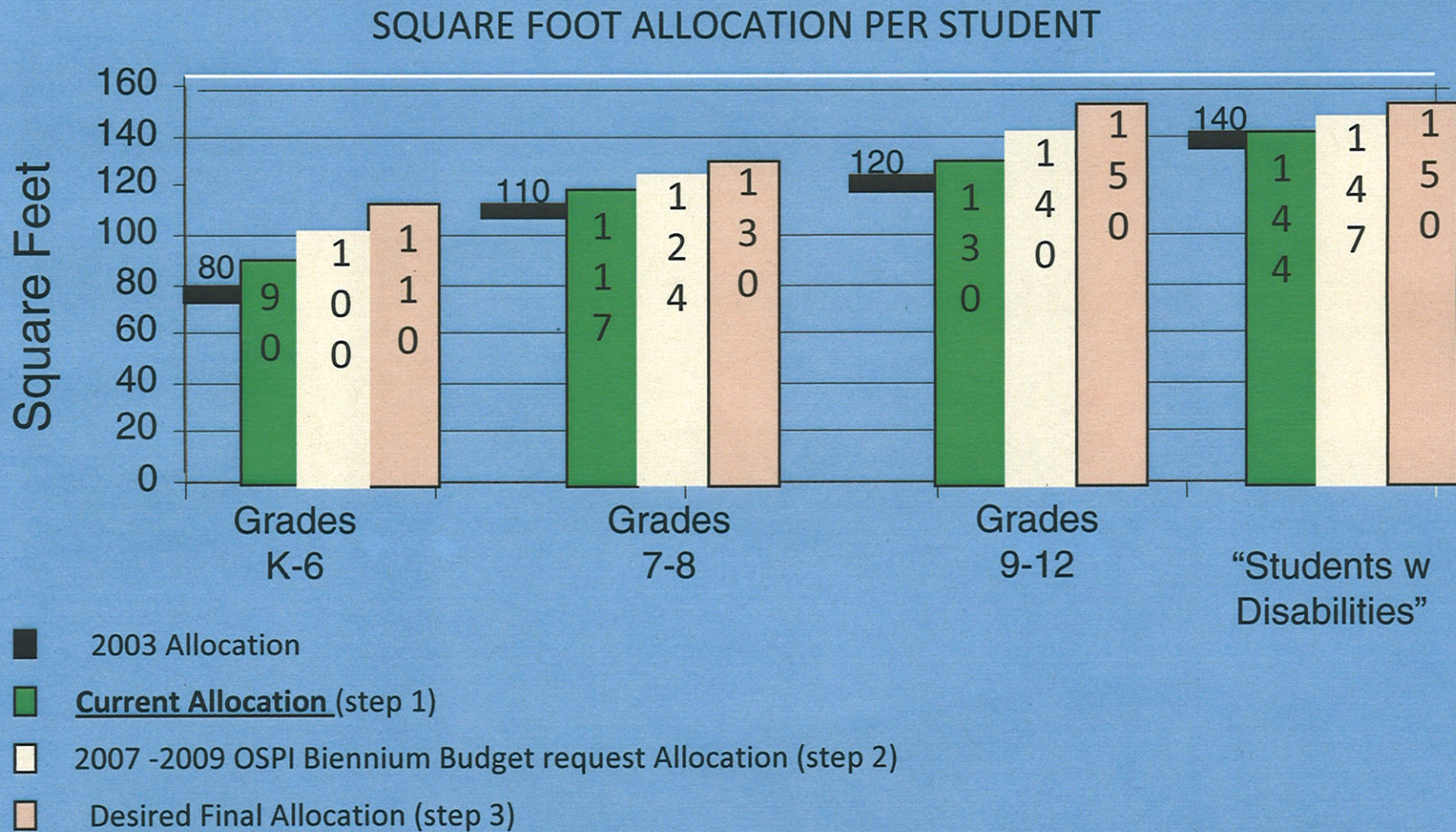
# SCHOOL DISTRICT BOND ELECTION HISTORY 1990-2007



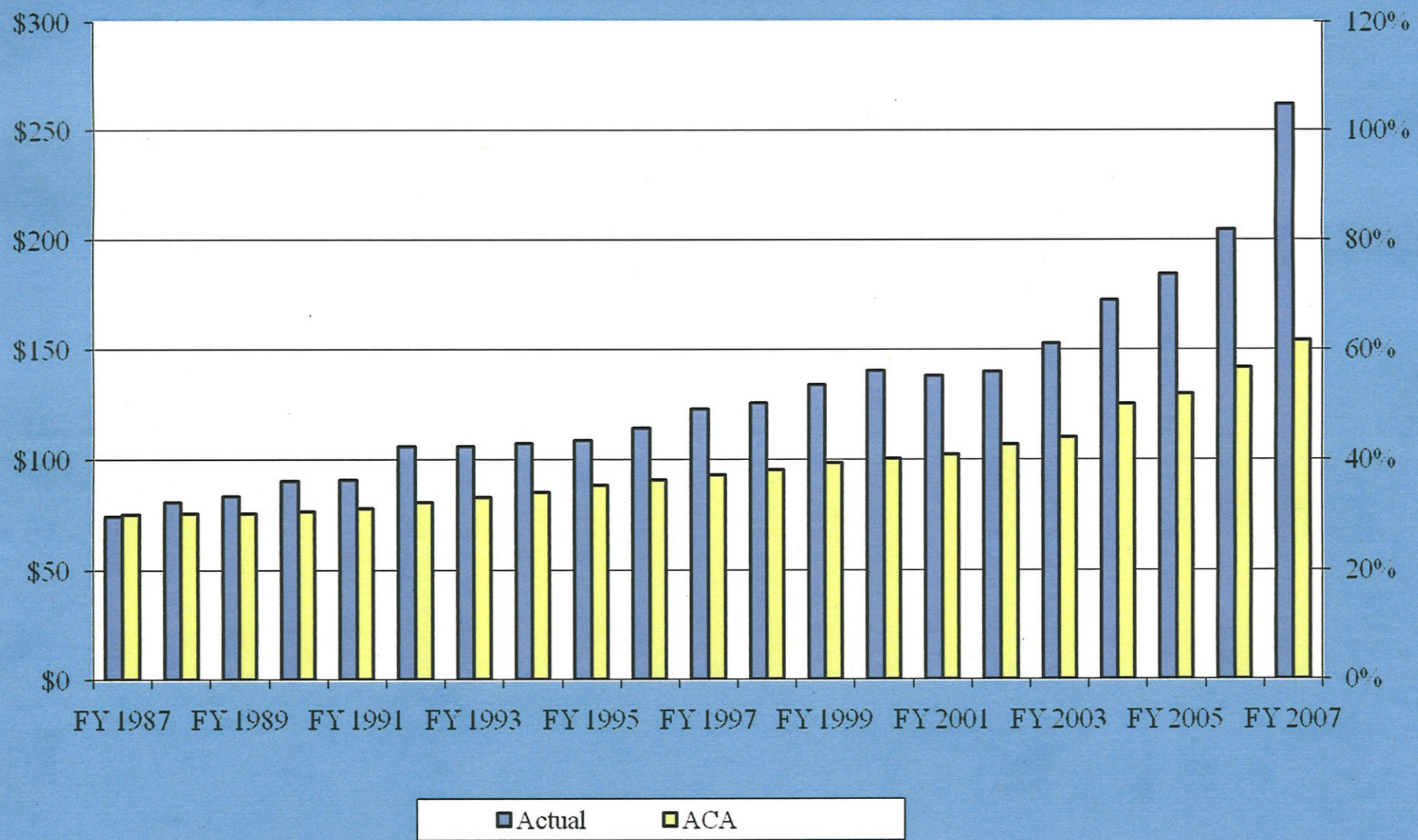
Basic policies and principles as revised in the 1990's are still applicable. Reliable and predictable funding of "July Release" responds to local voted bonds. Without that, project delays occur, costs rise, and future bonds are harder to pass.



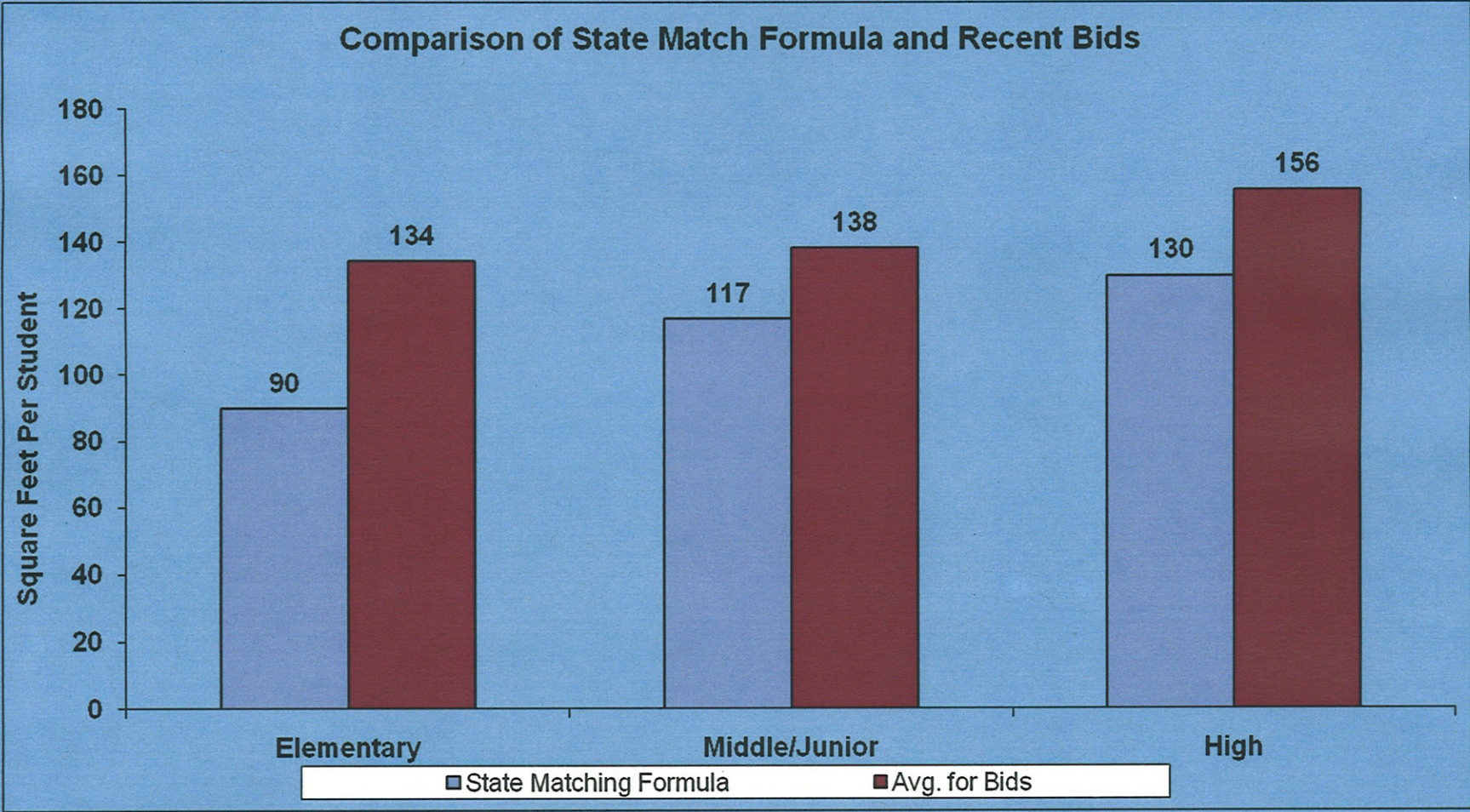
Enhancements to basic funding drivers helped, however further enhancements are still needed. Six-Year Plan to Enhance funding only partially achieved proposed adjustment to Student Square Foot Allocation.



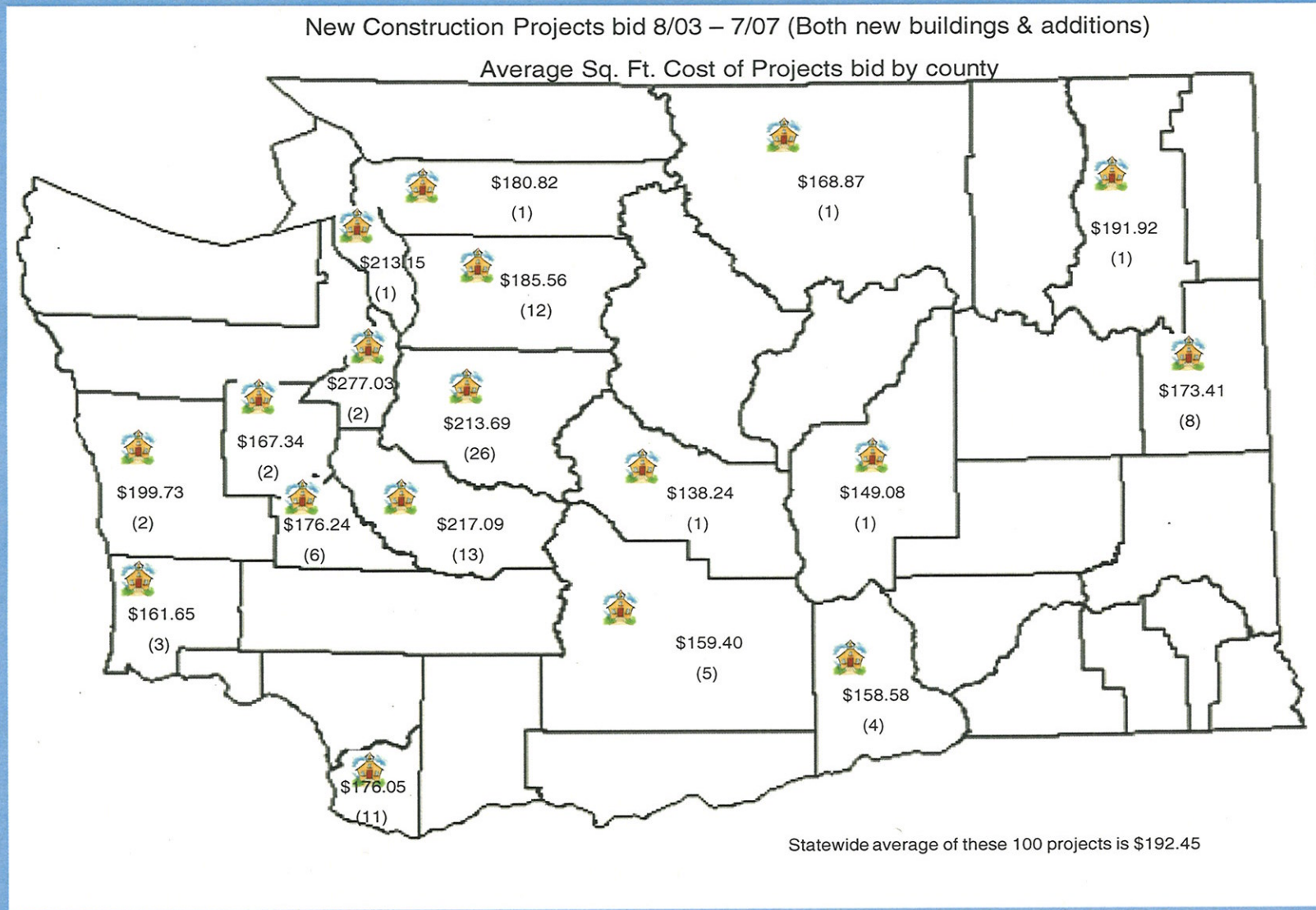
Partially achieved adjustment to the Area Cost Allowance but actual costs continue to increase at a faster pace.



# Information on space per student by grade span



There is not enough data to determine that inflation costs differ by geographic region.



A look at the matching ratio which attempts to provide, on average a 50% state funding level down to a minimum 20%.

2007 STATE MATCHING RATIOS

Sorted by basic match ratio

SCHOOL DISTRICT	OCT 03 FTE	OCT 06 FTE	ADJUSTED BASIC VALUATION	ADJUSTED VALUATION PER PUPIL	BASIC MATCH RATIO	ADD'L GROWTH POINTS	TOTAL MATCHING RATIO
SHAW	18.00	12.50	157,619,651	12,609,572.08	-65.69%		20.00%
EASTON	120.00	99.00	566,853,597	5,725,793.91	-37.36%		20.00%
ORCAS	488.80	473.41	2,355,131,113	4,974,823.33	-31.16%		20.00%
LOPEZ	260.13	238.08	1,063,728,763	4,467,946.75	-26.23%		20.00%
BRINNON	82.80	73.00	309,741,133	4,243,029.22	-23.81%		20.00%
SAN JUAN	917.80	882.47	3,520,327,000	3,989,174.70	-20.88%		20.00%
SKYKOMISH	56.30	54.98	179,717,404	3,268,777.81	-11.18%		20.00%
INDEX	31.20	28.50	90,888,376	3,189,065.82	-9.96%		20.00%
SEATTLE	44,227.56	43,168.78	120,926,051,235	2,801,238.56	-3.51%		20.00%
PATERSON	102.00	117.00	303,314,091	2,592,428.13	0.36%	4.90	20.00%
BLAINE	1,991.52	2,162.60	5,188,827,956	2,399,347.06	4.23%	2.86	20.00%
MERCER ISLAND	4,001.20	3,867.99	8,954,090,649	2,314,920.84	6.02%		20.00%
BELLEVUE	14,933.52	15,876.14	36,223,599,499	2,281,637.70	6.74%	2.10	20.00%
HOOD CANAL	523.00	465.50	1,041,830,680	2,238,089.54	7.70%		20.00%
CLE ELUM-ROSLYN	904.45	961.80	2,055,186,888	2,136,813.15	9.99%	2.11	20.00%
SOUTH WHIDBEY	2,132.91	1,910.98	4,053,216,761	2,121,014.75	10.36%		20.00%

# SHAW SCHOOL DISTRICT

## 2007 MATCHING RATIO CALCULATION (RCW 28A.525.166(2))

BASIC MATCH RATIO + TOTAL GROWTH POINTS = TOTAL MATCHING RATIO

ENROLLMENT		2006 Adj. Assessed Valuation	Adj. Assessed Valuation Per Pupil
October 2003	October 2006	Valuation	Per Pupil
18.00	12.50	\$157,619,651	\$12,609,572.08

STEP 1 3 -  $\frac{\$12,609,572.08}{\$870,425.99}$  divided by 3 +  $\frac{\$12,609,572.08}{\$870,425.99}$

STEP 2 (3 - 14.49) divided by (3 + 14.49)

STEP 3 (11.49) divided by 17.49

= (65.69%) BASIC MATCH RATIO

GROWTH POINTS:

Not Applicable

= 0.00% TOTAL GROWTH POINTS

STEP 4 = (65.69%) TOTAL MATCH RATIO



The state assistance program is not available to all districts because of a significant local match requirement. Some districts don't offer bonds or cannot pass bonds in order to access state funding.

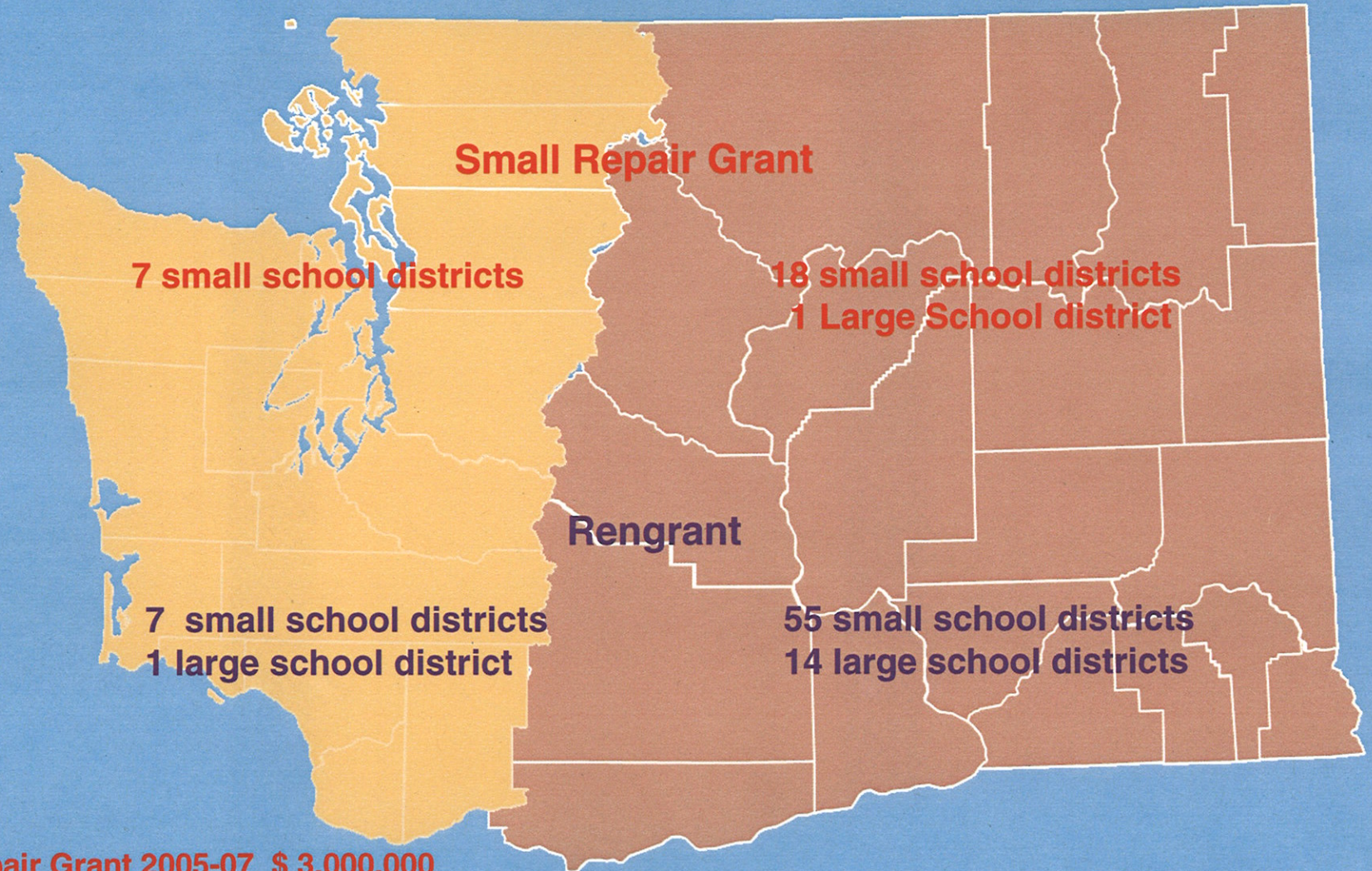
- 36 districts have not offered bond since 1985. 22 Eastern and 14 Western.

22 are non-High School districts.

ALMIRA	INCHELIUM	ORIENT
BENGE	KELLER	ROOSEVELT
BICKLETON	KLICKITAT	SATSOP
CLEARWATER	LACROSSE JOINT	SHAW
COLUMBIA	LAMONT	SKAMANIA
CRESCENT	MANSFIELD	STAR
CRESTON	MILL A	STARBUCK
DAMMAN	MOUNT PLEASANT	STEHEKIN
EVALINE	NESPELEM	STEPTOE
EVERGREEN	OAKESDALE	STEVENSON-CARSON
GLENWOOD	ONION CREEK	TAHOLAH
GREAT NORTHERN	ORCHARD PRAIRIE	WISHRAM

- 50 districts have not received state assistance for major capital project since 1975. 11 have received funds through the small repair program.

# School Districts With Urgent Repair Needs



**Small Repair Grant 2005-07 \$ 3,000,000**  
126 applications totaling \$11,431,893

**Federal Rengrant 2001-03 \$10,351,762**  
128 applications totaling \$26,000,000

**Large School District +2,000 FTE**  
**Small School District -2,000 FTE**

Recent 100% state funded projects are regionally significant like a skills center or environmental education facility, or respond to urgent deficiency repair.

- Regionally significant facilities:

- Vocational Skills Centers major and minor capital funding
- Environmental education facilities

- School district deficiency repair needs:

- Small Repair Grants to school districts

# Facility problems can be a result of inadequate or deferred maintenance. Overview of facility maintenance requirement.

- Facility maintenance requirements:
  - Construction assistant program now establishes
    - building life at 60 years (30 years new, 30 years after mod);
    - does not allow piecemeal work or deferred maintenance costs for modernizations; and,
    - requires up to 2% expenditures for maintenance beginning in 2008 for 15 years in order to maximize future eligibility to remodel.

APPLICATION OF THE 2 PERCENT RULE TO A \$1,000,000 MODERNIZATION PROJECT (1)			
Maintenance Reinvestment Rate (2) (%BRV)	Reduction of Allowable Cost (3) (%)	Allowable Cost (\$)	Reduction in Allowable Cost (4) (\$)
2% or more	0	1,000,000	0
1.5 – 2.0%	7.5	925,000	75,000
1.0 – 1.5%	15.0	850,000	150,000
0.5 – 1.0%	22.5	775,000	225,000
0.0 – 0.5%	100.0	0	1,000,000

A post-1992 school facility will be ineligible for the new-in-lieu option if the reinvestment level is less than 2 percent of the building's replacement value over the most recent 15 years.

# Demand is increasing in order to accommodate early learning

- Full Day Kindergarten and Class Size Reduction
  - Current square foot allocation for state assistance is at full day level of 90 square feet
  - Report to Legislature – mid-range estimate 1300 classrooms over 10 years at a cost of between \$124K to \$500K per classroom
  - Proposed options for providing support to school districts

## Description of state facility information

- Planning information – through Study and Survey
- Project information – through D-Form transmittals
- Some of information is entered into “VAX” (most used reports shown in case study)

# Update on K-12 Inventory project

- Progress to date
- Immediate next steps
- Deliverables for December 2007