



Department of Facilities and Transportation Services

FAIRFAX COUNTY
PUBLIC SCHOOLS

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November 20, 2014

TO: Peter F. Murphy, Chairman
Fairfax County Planning Commission

Fred Selden, Director
Fairfax County Department of Planning and Zoning

Barbara C. Berlin, Director
Fairfax County Zoning Evaluation Division, DPZ

FROM: Jeffrey Platenberg, Assistant Superintendent
Fairfax County Public Schools

SUBJECT: School Impact Proffer Formula and Student Yield Ratio Update

Periodically, the Office of Facilities Planning Services reviews and updates the suggested per student proffer contribution and student yield ratios. The per student proffer contribution is based on the FCPS Public Facilities Impact Formula and the related implementation of the Fairfax County Comprehensive Plan, Public Facilities Residential Development Criterion, that became effective on January 7, 2003. Pursuant to the implementation of the Public Facilities Criterion, it was anticipated that periodic updates and adjustments to the methodology be provided in order to reflect changes in student yield ratios by unit type and changes in capital construction costs. This includes changes to school capacity, changes in construction costs for elementary, middle, and high school buildings and modular construction costs. The methodology does exclude costs associated with land, fees, and equipment.

Using the adopted methodology, the suggested per student proffer contribution has increased from \$10,825 to \$11,749. The increase is primarily attributable to increasing construction costs. FCPS recommends that the new proffer amount of \$11,749 become effective for all residential rezoning applications accepted on or after December 1, 2014. For ease of reference, the proffer formula and calculations are attached.

In addition to the change in the suggested per student proffer contribution, the student yield ratios used to calculate the suggested proffer contribution have changed. This change reflects the current ratios generated by matching September 30, 2013, student data to 2013 housing counts by unit type. These updated ratios will be used to calculate the potential student yield for new residential development and the suggested school cash proffer amount beginning December 1, 2014.

The updated countywide student yield ratios from 2013-14 are as follows:

| | | | |
|--|------------------|--|------------------|
| Single Family Detached | .270 Elementary | Low-rise Multi-family (≤ 4 stories) | .194 Elementary |
| | .085 Middle | | .046 Middle |
| | <u>.175 High</u> | | <u>.085 High</u> |
| | .530 Total | | .325 Total |
| Single Family Attached (Townhouse) | .252 Elementary | Mid/High-rise Multi-family (> 4 stories) | .056 Elementary |
| | .062 Middle | | .016 Middle |
| | <u>.127 High</u> | | <u>.028 High</u> |
| | .441 Total | | .100 Total |

Peter F. Murphy
Fred Selden
Barbara C. Berlin
Page 2
November 20, 2014

To generate the new student yield ratios for school year 2013-14, housing information was obtained from the Integrated Parcel Life-Cycle System (IPLS) data layers that contain housing information by unit type from Fairfax County's Department of Neighborhood and Community Services. The City of Fairfax also provided GIS parcel data along with associated dwelling information. Similarly, Fort Belvoir's GIS Division provided housing data for the residential villages on post. Individual student addresses from the FCPS student information system were then matched to specific dwelling types. The 2013-14 student yield ratios for Low-rise Multi-family saw the biggest change over the 2012-13 ratios. For reference, historic student yield ratios are attached.

Since the methodology used to derive the proffer contribution is based, in part, on current construction costs, and that actual development and construction may not begin for some period of time after rezoning approval, FCPS continues to recommend that an escalation clause be included as part of any monetary school proffer contribution. Many developers have provided appropriate proffer language to address the potential changes in the adopted proffer formula so that when the proffer trigger is reached, the developer contribution is based on the then current student yield ratios and/or contribution formula and suggested proffer amount, whichever is the greater.

If you have any questions, please feel free to contact Kevin Sneed, Special Projects Administrator, Capital Projects and Planning, 571-423-2280.

JP/ks/gjb

Attachments (Proffer Calculation, Historic Proffer and Ratio Trends, Ratios by School Level)

cc: Edward Long, County Executive, Fairfax County
Karen Garza, Superintendent, FCPS
FCPS School Board Members
Susan Quinn, Chief Operating Officer
Kevin Sneed, Special Projects Administrator, Capital Projects and Planning
Warren Jenkins, Director, Administrative Services
Aimee Holleb, Assistant Director, Facilities Planning Services

Attachment 1: Proffer Contribution Calculation (November 2014)

Building Construction Costs

Construction costs for ES, MS & HS:

$\frac{\$207 \times 99,937 \text{ sf}}{975 \text{ capacity}} = \$21,217$ cost per ES student

$\frac{\$213 \times 176,824 \text{ sf}}{1,250 \text{ capacity}} = \$30,130$ cost per MS student

$\frac{\$222 \times 377,457 \text{ sf}}{2,500 \text{ capacity}} = \$33,518$ cost per HS student

Weighted average = **\$24,040** cost per student

Adjustment - Modular Construction Cost

Construction cost offset by modular:

\$24,040 (Weighted average)
 x **0.041** (School capacity provided by modular multiplier)
 = **\$985**

Construction cost of modular:

\$985 (Construction cost offset by modular)
 x **0.45** (Cost of modular multiplier)
 = **\$443**

Cost per student after modular adjustment:

\$24,040 (weighted average)
 - **\$985** (Construction cost offset by modular)
 + **\$443** (Construction cost of modular)
 = **\$23,498**

Adjustment - Level of Service

Cost per student after level of service adjustment:

\$23,498 (Cost per student after modular adjustment)
 x **0.5** (LOS multiplier)
 = **\$11,749 (Recommended Contribution)**

Explanation for "Weighted average":

| | Cost per student | | # of schools | Total |
|-------|------------------|---|--------------|-----------|
| ES | \$21,217 | x | 140 | 2,970,380 |
| MS | \$30,130 | x | 26 | 783,380 |
| HS | \$33,518 | x | 25 | 837,950 |
| Total | | | 191 | 4,591,710 |

$4,591,710 / 191 = \mathbf{24,040}$ weighted average cost per student

Explanation for "School capacity provided by modular multiplier":

Total Program Capacity

ES, MS, HS 185,756
 Modular 7,697

$7,697 / 185,756 = \mathbf{0.041}$ Modular Capacity Multiplier

Explanation for "Cost of modular multiplier":

Cost of modular construction is 45% of what permanent construction costs = **0.45**

Explanation for "LOS multiplier":

Average age of buildings/Life expectancy of buildings.
 $25/50 = \mathbf{0.5}$

Attachment 2: Historic County-wide Student Yield Ratios and Proffer Contribution (Updated November, 2014)

| Letter Date | School Year Student Data | Effective Date | Proffer (1) | SFD Ratio (2) | SFA Ratio (2) | MF(LR) Ratio (2) | MF(MR/HR) Ratio (2) | Notes |
|--------------------|--------------------------|-------------------|-------------|--|---------------|------------------|---------------------|---|
| June 13, 2002 | 2001-2002 | January 7, 2003 | \$ 7,500 | 0.473 | 0.372 | 0.227 | 0.102 | Baseline for Public Facilities Res. Dev. Criteria |
| May 22, 2006 | 2005-2006 | June 1, 2006 | \$ 11,630 | 0.479 | 0.356 | 0.199 | 0.076 | |
| June 28, 2007 | 2006-2007 | July 1, 2007 | \$ 12,400 | 0.480 | 0.348 | 0.193 | 0.078 | |
| October 15, 2008 | 2007-2008 | November 1, 2008 | \$ 11,548 | No Change to Ratios (Transition from DIT to FTS) | | | | |
| July 22, 2009 | 2008-2009 | September 1, 2009 | \$ 9,378 | 0.531 | 0.379 | 0.234 | 0.087 | Facilities Planning Begins Calculation of Ratios |
| August 24, 2012 | 2011-2012 | September 1, 2012 | \$ 10,488 | 0.531 | 0.440 | 0.291 | 0.110 | |
| September 18, 2013 | 2012-2013 | September 1, 2013 | \$ 10,825 | 0.536 | 0.430 | 0.302 | 0.106 | |
| November 20, 2014 | 2013-2014 | December 1, 2014 | \$ 11,749 | 0.530 | 0.441 | 0.325 | 0.100 | |

1) Proffer is per-student contribution recommendation

2) Ratios are county-wide averages

Attachment 3: Comparison of Student Yield Ratios By School Level (Updated November, 2014)

| | 2001-02 | 2005-06 | 2006-07 | 2008-09 | 2011-12 | 2012-13 | 2013-14 |
|--|--------------|--------------|--------------|--------------|--------------|--------------|--------------|
| Single Family Detached | | | | | | | |
| Elementary | 0.244 | 0.239 | 0.239 | 0.266 | 0.268 | 0.273 | 0.270 |
| Middle | 0.070 | 0.070 | 0.069 | 0.084 | 0.085 | 0.086 | 0.085 |
| High | 0.159 | 0.170 | 0.172 | 0.181 | 0.178 | 0.177 | 0.175 |
| Total | 0.473 | 0.479 | 0.480 | 0.531 | 0.531 | 0.536 | 0.530 |
| Single Family Attached (townhouse) | | | | | | | |
| Elementary | 0.210 | 0.194 | 0.190 | 0.204 | 0.249 | 0.243 | 0.252 |
| Middle | 0.053 | 0.052 | 0.050 | 0.057 | 0.063 | 0.060 | 0.062 |
| High | 0.109 | 0.110 | 0.108 | 0.118 | 0.128 | 0.127 | 0.127 |
| Total | 0.372 | 0.356 | 0.348 | 0.379 | 0.440 | 0.430 | 0.441 |
| Low Rise Multi-family (≤ 4 stories) | | | | | | | |
| Elementary | 0.137 | 0.114 | 0.109 | 0.136 | 0.173 | 0.181 | 0.194 |
| Middle | 0.030 | 0.026 | 0.025 | 0.032 | 0.040 | 0.042 | 0.046 |
| High | 0.060 | 0.059 | 0.059 | 0.066 | 0.078 | 0.079 | 0.085 |
| Total | 0.227 | 0.199 | 0.193 | 0.234 | 0.291 | 0.302 | 0.325 |
| Mid/High-rise Multi-family (> 4 stories) | | | | | | | |
| Elementary | 0.063 | 0.042 | 0.043 | 0.047 | 0.059 | 0.059 | 0.056 |
| Middle | 0.011 | 0.010 | 0.011 | 0.013 | 0.019 | 0.017 | 0.016 |
| High | 0.028 | 0.024 | 0.024 | 0.027 | 0.032 | 0.030 | 0.028 |
| Total | 0.102 | 0.076 | 0.078 | 0.087 | 0.110 | 0.106 | 0.100 |

Source Data for 2013-14:

Fairfax County GIS Department: January 1st 2013 Housing Unit Data (IPLS)

Fairfax City GIS Office: January 1st 2011 Housing Unit Data

FCPS DIT: September 30th 2013 Student Data (SIS)

Updated: 7/30/2014