

# Development Review/Proffer Process and Development Student Yield Ratios

## Facilities and Transportation Services

### Office of Facilities Planning

January 12, 2015  
School Board Work Session



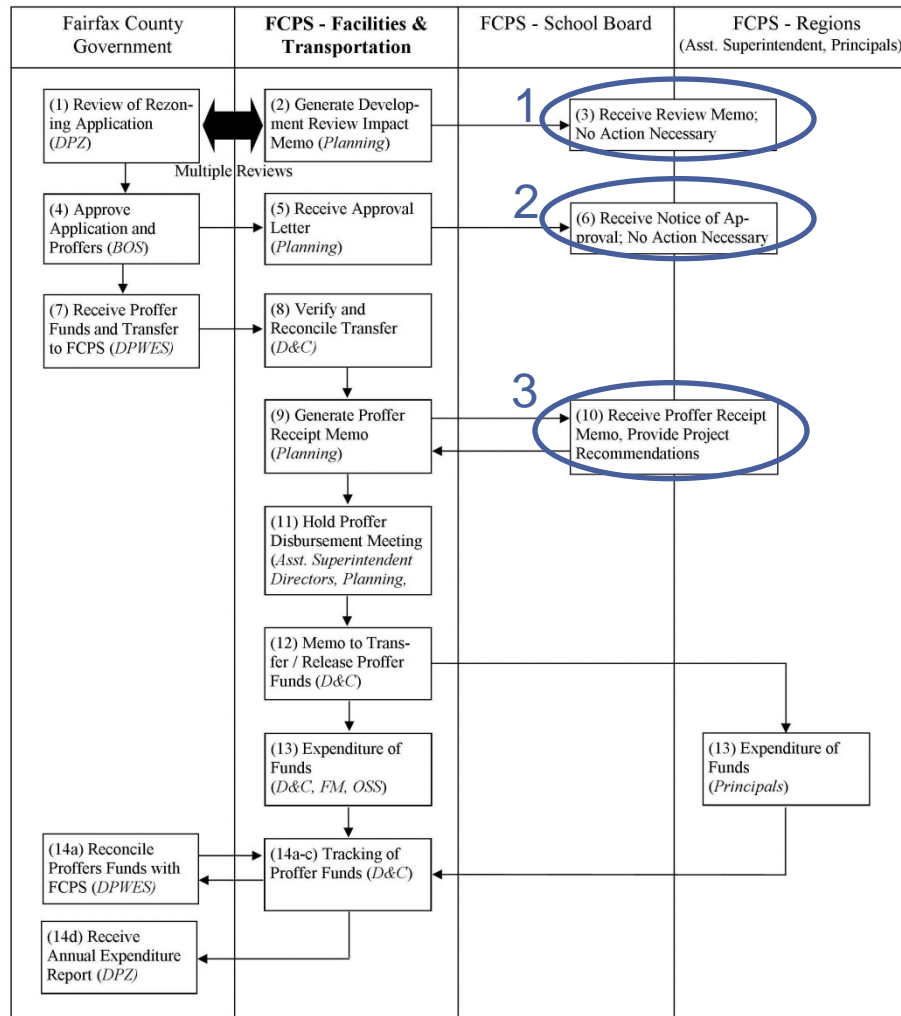
# Goals

- Discuss the Development Review/Proffer Process
- Examine Development Student Yield Ratios
- Review Possible Options for Consideration

# Proffer Background

- ❑ September 9, 2002, Board of Supervisors adopted the Residential Development Criteria Implementation Motion (effective January 7, 2003) which set a recommended per student Proffer Contribution Methodology.
- ❑ Formula calculations are reviewed and updated as new numbers and costs are available. The methodology has remained unchanged.
- ❑ A proffer is a voluntary condition of a rezoning.
- ❑ Proffer contributions are used to offset the impact of new development on surrounding facilities.
- ❑ Proffer contributions are typically monetary contributions used for capital improvements that enhance school capacity (*Code of Virginia § 15.2-2303.2.D, effective July 1, 2013*).

# Development Review/Proffer Process



## Communication Points to School Board:

1. Development Review Impact Memo provided to School Board Members.
2. If Rezoning Approved, Approval Notice sent to School Board Members quarterly via Superintendent's Update.
3. If Approved Rezoning has Proffers, Proffer Receipt Memo sent to School Board Members notifying them of proffer funds.

Source: FCPS Facilities Planning


# Communication Point 1: Development Review Impact Memo

- ❑ Capacity status of impacted schools
- ❑ Status of any current or planned capital improvement projects
- ❑ Type and number of units proposed
- ❑ Net change in estimated student yields by school level (ES, MS, HS)
- ❑ Recommendations for school facilities
- ❑ Recommended proffer contribution and escalation clause

Source: FCPS Facilities Planning



January 12, 2015



**FAIRFAX COUNTY  
PUBLIC SCHOOLS**

Department of Facilities and Transportation Services  
Office of Facilities Planning Services  
8115 Gatehouse Road, Suite 3200  
Falls Church, Virginia 22042

October 17, 2014

**TO:** Barbara Berlin, Director  
Zoning Evaluation Division  
Fairfax County Department of Planning & Zoning

**FROM:** Aimee Holleb, Assistant Director *AH*  
Office of Facilities Planning Services

**SUBJECT:** RZ/FDP 2014-BR-019, Christopher at Kenilworth, LLC

**ACREAGE:** 3.59 acres

**TAX MAP:** 69-1 ((1)) 29

**PROPOSAL:**  
The application requests to rezone the site from R-1 to PDH-3 district. The proposal would permit a maximum of 9 single family detached houses. Under the current R-1 zoning, the site could be developed with 3 single family detached houses.

**ANALYSIS:**  
School Capacities  
The schools serving this area are Laurel Ridge Elementary and Robinson Secondary schools. The chart below shows the existing school capacity, enrollment, and projected enrollment.

School	Capacity 2013 / 2018	Enrollment (9/30/13)	Projected Enrollment 2014-15	Capacity Balance 2014-15	Projected Enrollment 2018-19	Capacity Balance 2018-19
Laurel Ridge ES	903 / 903	814	770	133	675	228
Robinson MS	1,296 / 1,296	1,219	1,162	134	1,098	198
Robinson HS	2,568 / 2,568	2,709	2,793	-225	2,570	-2

Capacities based on 2015-2019 Capital Improvement Program (December 2013)  
Project Enrollments based on 2013-14 to 2018-19 6-Year Projections (April 2013)


The school capacity chart above shows a snapshot in time for student enrollments and school capacity balances. Student enrollment projections are done on a six year timeframe, currently through school year 2018-19 and are updated annually. At this time, if development occurs within the next five years, Laurel Ridge ES and Robinson MS are projected to have surplus capacity; Robinson HS is projected to have a slight capacity deficit. Beyond the six year projection horizon, enrollment projections are not available.

Capital Improvement Program Projects  
The FY 2015-19 Capital Improvement Program (CIP) does not include any major capital projects at the subject schools.

Development Impact  
Based on the number of residential units proposed, the chart below shows the number of anticipated students by school level based on the current countywide student yield ratio.

# Communication Point 2: Approval Notice

- ❑ Type and number of units approved
- ❑ Estimated number of new students
- ❑ Estimated proffer contribution amount
- ❑ Proffer contributions are officially set (not paid) at approval
- ❑ After approval, payment timelines of proffer funds vary (months or years)



Superintendent Update  
to the School Board

November 18, 2014

**Rezoning Approvals – 3<sup>rd</sup> Quarter 2014**

For your information and as part of the proffer process, the Office of Facilities Planning has received approval letters from Fairfax County during the third quarter (July 1<sup>st</sup> to September 30<sup>th</sup>) of 2014 for the following residential rezoning applications:

District	Application #	Application Name	Proposed Units	Estimated Existing Students*	Estimated Proposed Students*	Estimated New Students*	Estimated Proffer*
Dranesville	RZ 2012-DR-019	Elm Street	240 Multi-family Units	0	27	27	\$283,176
Mount Vernon	PCA 2012-MV-007	Accotink Village	283 Multi-family Units	11	30	19	\$205,675
Providence	RZ 2012-PR-002	Greensboro Park	520 Multi-family Units	0	58	58	\$543,924
Providence	RZ 2013-PR-007	Eskridge Realty	25 Townhomes	0	12	12	\$125,856

\*Estimation based on review of approved proffer statement and/or development review memos for the application.

Proffer payments are typically triggered by certain milestones in the development of the project. The trigger milestone could be within months of approval or could be several years after approval depending on the pace at which the project is pursued for development.

We will notify you upon receipt of project funding.


Source: FCPS Facilities Planning

# Communication Point 3: Proffer Receipt Memo

- ❑ The amount of proffer funds received
- ❑ Official proffer language which specifies how funds can be spent
- ❑ Identification of schools serving the development
- ❑ Code of Virginia requires funds to be spent on enhancements to school capacity (*Code of Virginia § 15.2-2303.2.D, effective July 1, 2013*)
- ❑ Request to School Board Members, RAS, & Principals for projects to enhance school capacity

Source: FCPS Facilities Planning





**FAIRFAX COUNTY  
PUBLIC SCHOOLS**

Department of Facilities and Transportation Services  
Office of Facilities Planning  
8115 Gatehouse Road, Suite 3400  
Falls Church, Virginia 22042

February 25, 2013

**TO:** Kathy Smith, Member, School Board  
Sully District

**FROM:** Jeffrey Platenberg, Assistant Superintendent, Facilities and Transportation Services

**SUBJECT:** Receipt of Proffer Funds

Recently, FCPS received a quarterly proffer fund transfer from the County in the amount of \$19,353 for the Sully District. The chart below provides the details on this proffer transfer.

REZONING CASE	PLAN NAME	AMOUNT	DEVELOPER'S NAME	DESCRIPTION
2011-SU-003	Rockland Village, Lot 21	\$19,353	MCSHAY AT ROCKLAND VILLAGE LLC	FOR CAP FACILITIES WITHIN SCHOOLS SERVING DEVELOPMENT

This proffer money was received pursuant to Rezoning RZ 2011-SU-003, which was approved in 2011 for 4 single family dwellings.

15. **Public Schools.** Prior to the issuance of the first building permit, the Applicant shall contribute \$18,756 to the Fairfax County School Board to be utilized for the provision of capital facilities within the Fairfax County schools serving this development.
16. **Escalation.** All monetary contributions required in these Proffered Conditions shall be adjusted for inflation in conformance with the Consumer Price Index, occurring subsequent to the date of subject rezoning approval and up to the date of payment of the respective contribution.

The schools serving this development are Brookfield Elementary, Franklin Middle and Chantilly High schools. Attached is a map showing the location of this development.

Please advise if you have specific projects to which this proffer amount could be applied. It is noted that the proffer amount is limited to capital improvement projects. Examples of capital improvement projects are: existing or upcoming facility maintenance (bleacher replacement, new flooring, roof replacement, etc.), facility renovation, capacity enhancement, safety and security, etc. Staff will review the recommendations received and determine the allocation and disbursement of the proffer funds.

January 12, 2015

# Proffer Tracking

- ❑ Facilities and Transportation Services track both paid and unpaid proffers, which can be reported by magisterial district.
- ❑ Once projects have been identified for funding Facilities and Transportation Services proffer files are updated to note selected project.
- ❑ Annual expenditures reported to the County to be provided as part of State's Commission on Local Government Cash Proffer Reporting requirement.



# Proffer Distribution

1. Solicit feedback from Principals, Region Assistant Superintendents, and School Board Members for proffer project requests.
2. Review project requests with Division Counsel for conformance to the specific proffer language and State Code (*Code of Virginia § 15.2-2303.2.D, effective July 1, 2013*) restrictions on the use of proffer funds.
3. Review submitted project requests, existing capital projects, and other known projects/needs.
4. Make recommendations for proffer funds based upon review.
5. Assistant Superintendent of Facilities and Transportation Services meets with School Board Members prior to finalizing the designation of proffer funds.

# Proffer Contribution Formula/Calculation

- Formula calculations are reviewed and updated as new numbers and costs are available. The Methodology has remained unchanged.

Attachment 1: Proffer Contribution Calculation (November 2014)

## Building Construction Costs

### Construction costs for ES, MS & HS:

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

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

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

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

### Adjustment - Modular Construction Cost

#### Construction cost offset by modular:

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

#### Construction cost of modular:

**\\$985** (Construction cost offset by modular)  
 $\times 0.45$  (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 (LOS)

#### Cost per student after level of service adjustment:

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

### Explanation for "Weighted average":

	Cost per student		# of school buildings	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.  
 $25/50 = \mathbf{0.5}$

Source: FCPS, Facilities and Transportation Services, November 20, 2014.

Effective December 1, 2014.

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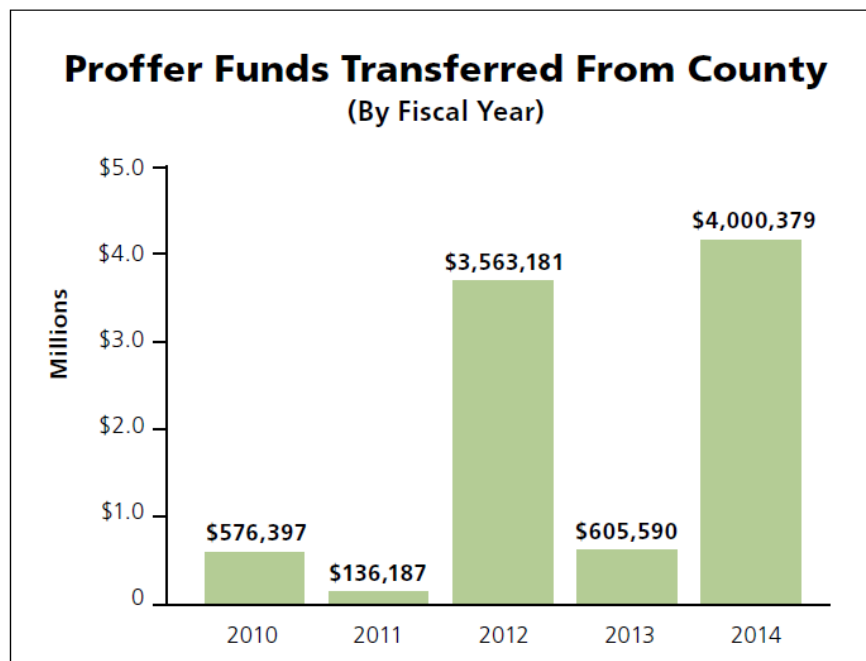
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Effective December 1, 2014.

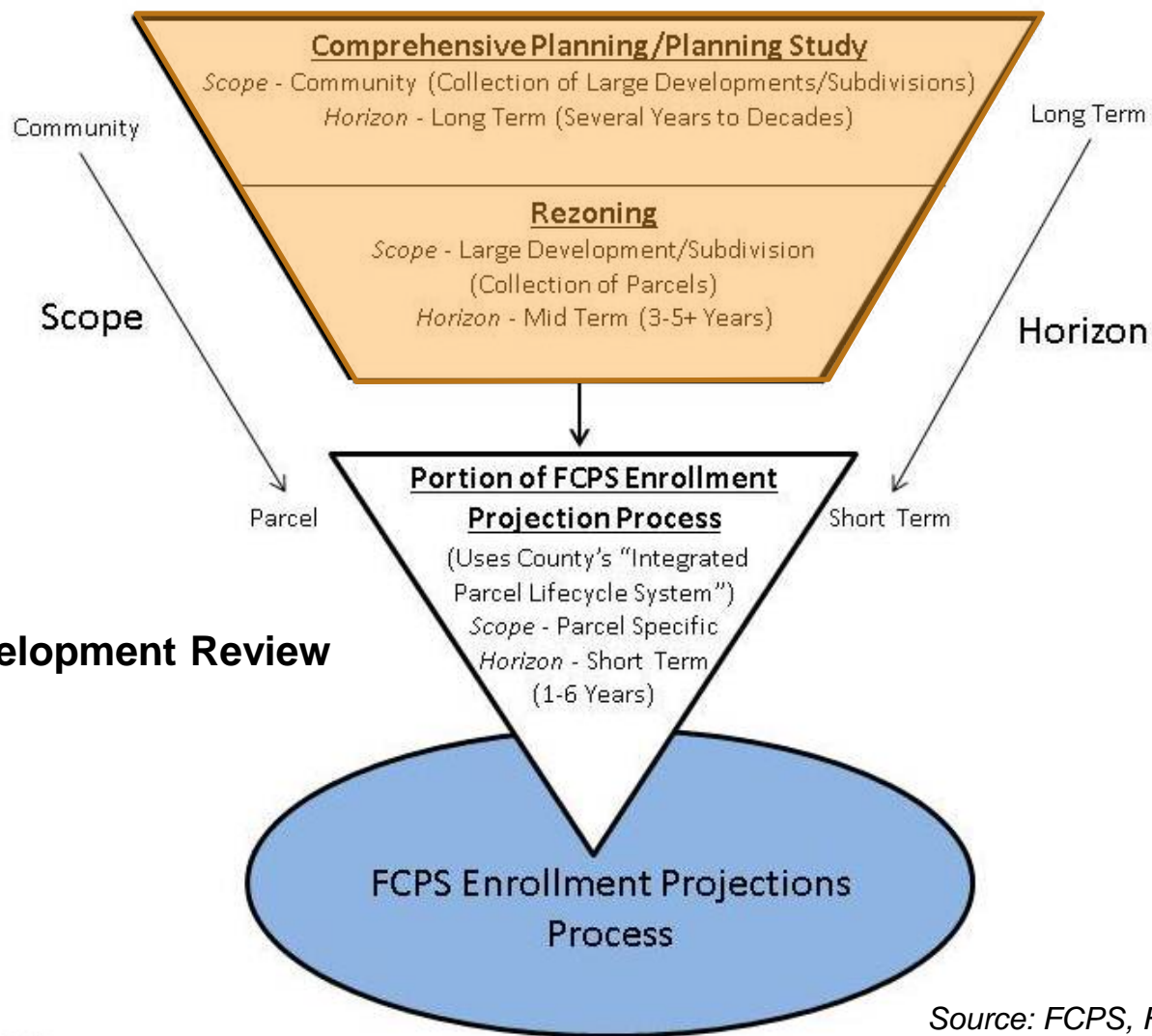
# Proffer Receipts

- ❑ \$18.5 million since FY 2003, approximately \$9 million since FY 2010.
- ❑ Proffer funding is an unpredictable funding source. Payments are not date specific but are triggered based on project milestones (site plan approval, building permit approval, occupancy).



Source: FCPS, Proposed FY2016-20 Capital Improvement Program

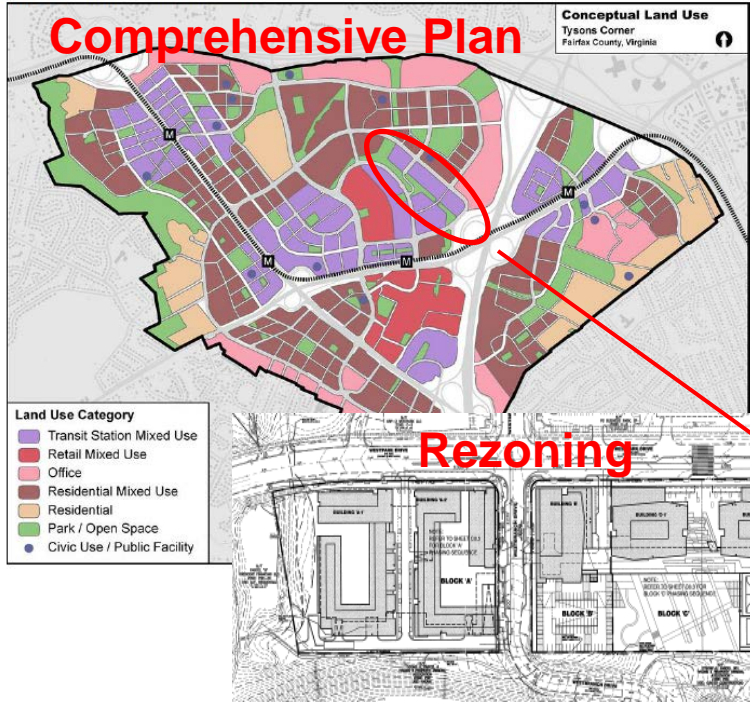
# FCPS Residential Development Monitoring



Source: FCPS, Facilities Planning

# Scope of Development - Arbor Row Development

Figure 2: Planned Conceptual Land Use



Source: Fairfax County Comprehensive Plan, Tysons Corner Urban Center, Conceptual Land Use, Map 3.

Source: Fairfax County, RZ 2011-PR-023, Arbor Row, Development Plan.

Source: FCPS Facilities Planning, RZ 2011-PR-023, Arbor Row, Building E Construction.

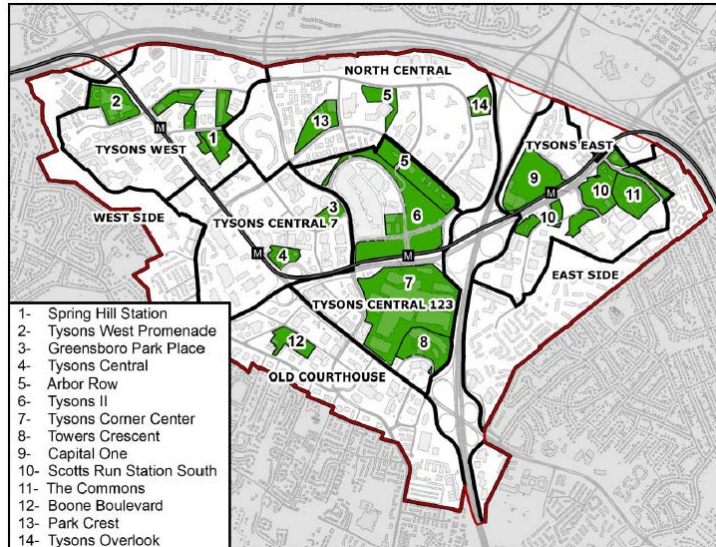




# Horizon of Development – Tysons Corner Timeline

- ❑ Plan Reviewed (by FCPS): 2006-2008
- ❑ Plan Adopted: 2010
- ❑ 14 Approved Major Applications  
(In green in map below)

Figure 3: Approved Major Application Areas



Source: Fairfax County, Report to Board of Supervisors on Tysons – 2014.

## 1. Spring Hill Station (2010-PR-014A):

- ❑ Rezoning Reviewed (by FCPS): February 2011
- ❑ Rezoning Approved: September 2011
- ❑ Construction: Complete
- ❑ Students Arrived: SY 2014-15

## 1. Spring Hill Station (2010-PR-014B):

- ❑ Rezoning Reviewed (by FCPS): February 2011
- ❑ Rezoning Approved: September 2011
- ❑ Construction: No Activity
- ❑ Students Arrived: TBD

## 5. Arbor Row (RZ 2011-PR-023):

- ❑ Rezoning Reviewed (by FCPS): August 2011
- ❑ Rezoning Approved: November 2012
- ❑ Construction: Building E Under Construction
- ❑ Students Arrived: TBD

# Development Student Yield Ratios

- ❑ Used for Development Review Impact Memos. Looking at the long term impact of housing (Planning for Facilities and Proffers)
- ❑ Result of Ratio is estimation of Student Yield from proposed housing
- ❑ Ratio based on average yields across the County, as specified in the Implementation Motion for the Residential Development Criteria adopted by the Board of Supervisors in 2002
- ❑ Housing Categories include: Single Family, Townhouse, Multi-family low-rise, Multi-family mid-rise/high-rise

$$\text{Development Student Yield Ratio} = \frac{\text{Number of Actual Students Residing in Housing Type (By School Level)}}{\text{Number of Actual Housing Units in Housing Type}}$$

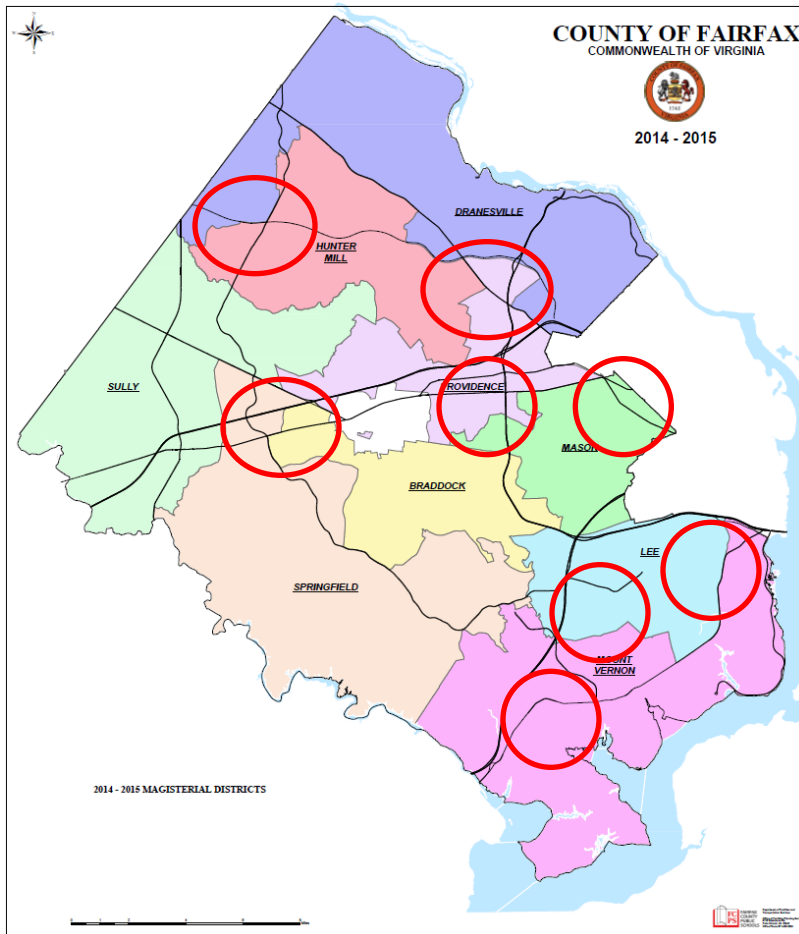


# Development Student Yield Ratios

- ❑ Development Student Yield Ratios use Countywide averages as specified in the Implementation Motion for the Residential Development Criteria adopted by the Board of Supervisors in 2002
- ❑ The ratio of students per housing unit, by housing type, by school level (ES, MS, HS)

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

# Development Student Yield Ratios Sampling



- Sampling of 45 residential developments constructed since 2003.

- Included a variety of unit types.
- Different areas of County (see map).
- Multiple development (4 to 7) per area.

- Findings:

- 67% of all developments near or below estimated yield.
- 93% of developments above estimated yield were Single Family and Townhouse projects.
- 70% of Single Family developments above estimated yield.
- 95% of Multi-family developments near or below estimated yield.

Source: FCPS Facilities Planning

# Summary and Possible Options

- ❑ Multiple Points of Communication Throughout the Process
- ❑ Timing of Proffer Receipts Vary
- ❑ Process for Proffers in Place (notification, distribution, tracking)
- ❑ Accuracy of Development Student Yield Ratios
- ❑ Possible Options for Consideration:
  - *Review of Proffer Formula Methodology Warranted.*
  - *Review of Single Family Development Student Yield Ratios for Possible Enhancements.*
  - *Review of the County's Comprehensive Plan as Related to Schools.*