
LAKEWOOD SCHOOL DISTRICT NO. 306

CAPITAL FACILITIES PLAN

2016-2021

Adopted: August 17, 2016

LAKEWOOD SCHOOL DISTRICT NO. 306

CAPITAL FACILITIES PLAN

2016-2021

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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 have adopted 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.

The Lakewood School District (the “District”) has prepared this Capital Facilities Plan (the “CFP”) to provide Snohomish County (the “County”) and the cities of Arlington and Marysville with a description of facilities needed to accommodate projected student enrollment and a schedule and financing program for capital improvements over the next six years (2016-2021).

In accordance with the Growth Management Act, adopted County Policy, the Snohomish County Ordinance Nos. 97-095 and 99-107, the City of Arlington Ordinance No. 1263, and the City of Marysville Ordinance Nos. 2306 and 2213, this CFP contains the following required elements:

- Future enrollment forecasts for each grade span (elementary, middle, and high school).
- An inventory of existing capital facilities owned by the District, showing the locations and capacities of the facilities.
- A forecast of the future needs for capital facilities and school sites.
- The proposed capacities of expanded or new capital facilities.
- 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 which 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 and supporting data substantiating said fees.

In developing this CFP, the District followed the following guidelines set forth in the Snohomish County General Policy Plan:

- Districts should use information from recognized sources, such as the U.S. Census or the Puget Sound Regional Council. School districts may generate their own data if it is derived through statistically reliable methodologies. Information must not be inconsistent with Office of Financial Management (“OFM”) population forecasts. Student generation rates must be independently calculated by each school district.
- The CFP must comply with the GMA.
- The methodology used to calculate impact fees must comply with the GMA. The CFP must identify alternative funding sources in the event that

impact fees are not available due to action by the state, county or cities within the District.

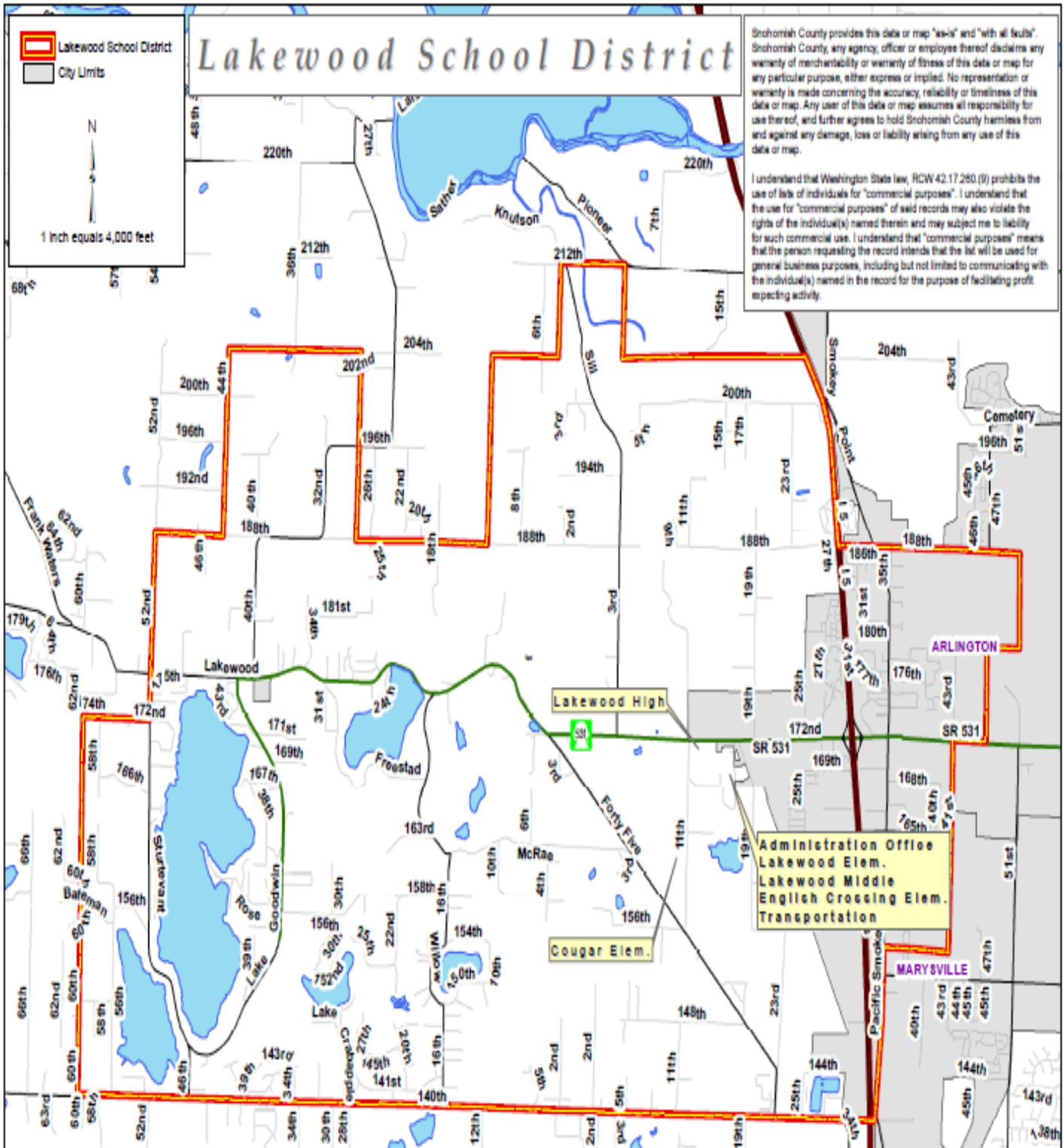
- The methodology used to calculate impact fees also complies with the criteria and the formulas established by the County.

B. Overview of the Lakewood School District

The Lakewood School District is located along Interstate 5, north of Marysville, Washington, primarily serving unincorporated Snohomish County and a part of the City of Arlington and the City of Marysville. The District is bordered on the south by the Marysville School District, on the west and north by the Stanwood School District, and on the east by the Arlington School District.

The District serves a student population of 2,275 (October 1, 2015, reported enrollment) with three elementary schools, one middle school, and one high school.

**FIGURE 1
MAP OF FACILITIES**



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 educational program standards which typically drive facility space needs include grade configuration, optimum facility size, class size, educational program offerings, classroom utilization and scheduling requirements, and use of relocatable classroom facilities (portables), as well as specific and unique physical structure needs required to meet the full access needs of students with special needs.

In addition to factors which affect the amount of space required, government mandates and community expectations may affect how classroom space is used. Traditional educational programs offered by school districts are often supplemented by nontraditional, or special programs such as special education, expanded bilingual education, remediation, migrant education, alcohol and drug education, AIDS education, preschool and daycare programs, computer labs, music programs, and others. These special or nontraditional educational programs can have a significant impact on the available student capacity of school facilities, and upon planning for future needs.

The State Legislature's implementation of requirements for full-day kindergarten and reduced K-3 class size will also impact school capacity and educational program standards. The District has implemented full-day kindergarten classes. The District anticipates implementation of reduced K-3 class sizes in the 2017-18 school year. However, the details of implementation are still being reviewed. Future updates to this CFP will include any final implementation of reduced K-3 class size.

Special programs offered by the District at specific school sites include, but are not limited to:

Lakewood Elementary School (Preschool through 5th Grades)

- Bilingual Education Program
- Title I Remedial Services Program
- P – 5th Grade Counseling Services
- Speech and Language Disorder Therapy Program
- Early Childhood Education and Assistance Program (ECEAP)
- Developmentally Delayed Preschool Program - Ages 3 to 5
- Developmentally Delayed Kindergarten Program
- K-5th Grade Special Education Resource Room Program
- K – 5th Grade Special Education Life Skills Program
- Learning Assistance Program - Remedial Services
- Occupational Therapy Program

English Crossing Elementary School (Kindergarten through 5th Grades)

- K through 5th Grade Special Education Resource Room Program
- Bilingual Education Program
- K – 5th Grade Counseling Services
- Speech and Language Disorder Therapy Program
- Learning Assistance Program - Tutorial Services
- Occupational Therapy Program
- Special Education EBD Program

Cougar Creek Elementary School (Kindergarten through 5th Grades)

- Bilingual Education Program
- Title I Remedial Services Program
- Speech and Language Disorder Therapy Program
- Learning Assistance Program – Remedial Services (Learning Lab)
- Occupational Therapy Program
- K – 5th Grade Special Education Resource Room Program
- K – 5th Grade Special Education Life Skills Program
- K – 5th Grade Counseling Services
- 3 – 5th Highly Capable/Enrichment Program (serves grades 3-5 district-wide)

Lakewood Middle School (6th through 8th Grades)

- Speech and Language Disorder Therapy Program
- 6th-8th Grade Special Education Resource and Inclusion Program
- 6th-8th Grade Special Education Life Skills Program
- Bilingual Education Program
- Learning Assistance Program - Tutorial Services
- Occupational Therapy Program
- 6th – 8th Grade Counseling Services

Lakewood High School

- 9th-12th Grade Special Education Resource Room and Transition Program
- 6th-12th Grade Special Education Life Skills Program
- Bilingual Education Program
- Occupational Therapy Program
- Speech and Language Disorder Program
- 9th – 12th Grade Counseling Program

Variations in student capacity between schools may result from the special or nontraditional programs offered at specific schools. Some students, for example, leave their regular classroom for a short period of time to receive instruction in these special programs. Schools recently added to the District's inventory have been designed to accommodate many of these programs. However, existing schools often require space modifications to accommodate special programs,

and in some circumstances, these modifications may affect the overall classroom capacities of the buildings.

District educational program standards may change in the future as a result of changes in the program year, special programs, class sizes, grade span configurations, use of new technology, and other physical aspects of the school facilities. The school capacity inventory will be reviewed periodically and adjusted for any changes to the educational program standards. These changes will also be reflected in future updates of this Capital Facilities Plan.

The District educational program standards which directly affect school capacity are outlined below for the elementary, middle, and high school grade levels.

Educational Program Standards For Elementary Schools

- Class size for grades K – 4th will not exceed 23 students.
- Class size for grades 5th – 8th will not exceed 26 students.
- All students will be provided library/media services in a school library.
- Special Education for students may be provided in self-contained or specialized classrooms.
- All students will be provided music instruction in a separate classroom.
- All students will have scheduled time in a computer lab. Each classroom will have access to computers and related educational technology.
- Optimum design capacity for new elementary schools is 475 students. However, actual capacity of individual schools may vary depending on the educational programs offered.
- All students will be provided physical education instruction in a gym/multipurpose room.

Educational Program Standards For Middle and High Schools

- Class size for middle school grades will not exceed 26 students.
- Class size for high school grades will not exceed 28 students.
- As a result of scheduling conflicts for student programs, the need for specialized rooms for certain programs, and the need for teachers to have a work space during planning periods, it is not possible to achieve 100% utilization of all regular teaching stations throughout the day. In updating this Capital Facility Plan, a building review of classroom use was conducted in order to reflect the actual classroom utilization in the high school and middle school. Therefore, classroom capacity should be adjusted using a utilization factor of 95% at the middle school and 85% at the high school to reflect the use of classrooms for teacher planning. Special Education for students will be provided in self-contained or specialized classrooms.
- All students will have access to computer labs. Each classroom is equipped with access to computers and related educational-technology.
- Identified students will also be provided other nontraditional educational opportunities in classrooms designated as follows:
 - Counseling Offices
 - Resource Rooms (i.e. computer labs, study rooms)
 - Special Education Classrooms

Program Specific Classrooms (i.e. music, drama, art, physical education, Industrial Arts and Agricultural Sciences).

- Optimum design capacity for new middle schools is 600 students. However, actual capacity of individual schools may vary depending on the educational programs offered.
- Optimum design capacity for new high schools is 800 students. However, actual capacity of individual schools may vary depending on the educational programs offered.

Minimum Educational Service Standards

The District will evaluate student housing levels based on the District as a whole system and not on a school by school or site by site basis. This may result in portable classrooms being used as interim housing, attendance boundary changes or other program changes to balance student housing across the system as a whole. A boundary change or a significant programmatic change would be made by the Board of Directors following appropriate public review and comment.

The District’s minimum level of service is as follows: on average, K-4 classrooms have no more than 26 students per classroom, 5-8 classrooms have no more than 28 students per classroom, and 9-12 classrooms have no more than 30 students per classroom. The District has set minimum educational service standards based on several criteria. Exceeding these minimum standards will trigger significant changes in program delivery. Minimum standards have not been met if, on average using current FTE figures: K-4 classrooms have more than 26 students per classroom, 5-8 classrooms have more than 28 students per classroom, or 9-12 classrooms more than 30 students per classroom. For purposes of this determination, the term “classroom” does not include special education classrooms or special program classrooms (i.e. computer labs, art rooms, chorus and band rooms, spaces used for physical education and other special program areas). Furthermore, the term “classroom” does not apply to special programs or activities that may occur in a regular classroom. The minimum educational service standards are not District’s desired or accepted operating standard.

For the school years of 2013-14 and 2014-15, the District’s compliance with the minimum educational service standards was as follows:

2013-14 School Year						
LOS Standard	MINIMUM LOS# Elementary	REPORTED LOS Elementary	MINIMUM LOS Middle	REPORTED LOS Middle	MINIMUM LOS High	REPORTED LOS High
	26	13	28	21	30	28.7

* The District determines the reported service level by adding the number of students in regular classrooms at each grade level and dividing that number by the number of teaching stations (excludes portables).

2014-15 School Year						
LOS Standard	MINIMUM LOS# Elementary	REPORTED LOS Elementary	MINIMUM LOS Middle	REPORTED LOS Middle	MINIMUM LOS High	REPORTED LOS High
	26	17	28	21	30	27

* The District determines the reported service level by adding the number of students in regular classrooms at each grade level and dividing that number by the number of teaching stations (excludes portables).

**SECTION 3
CAPITAL FACILITIES INVENTORY**

The facilities inventory serves to establish a baseline for determining the facilities necessary to accommodate future demand (student enrollment) at acceptable levels of service. This section provides an inventory of capital facilities owned and operated by the District including schools, relocatable classrooms, undeveloped land, and support facilities. Facility capacity is based on the space required to accommodate the District’s adopted educational program standards. See Section 2. Attached as Figure 1 (page 3) is a map showing locations of District facilities.

A. Schools

The District maintains three elementary schools, one middle school, and one high school. Lakewood Elementary School accommodates grades P-5, Cougar Creek Elementary School accommodates grades K-5, and English Crossing Elementary School accommodates grades K-5. Lakewood Middle School serves grades 6-8, and Lakewood High School serves grades 9-12.

School capacity was determined based on the number of teaching stations within each building and the space requirements of the District’s adopted educational program. It is this capacity calculation that is used to establish the District’s baseline capacity, and to determine future capacity needs based on projected student enrollment. The school capacity inventory is summarized in Table 1.

Relocatable classrooms are not viewed by the District as a solution for housing students on a permanent basis. Therefore, these facilities were not included in the school capacity calculations provided in Table 1.

**Table 1
School Capacity Inventory**

Elementary School	Site Size (Acres)	Building Area (Square Feet)	Teaching Stations	Permanent Capacity	Year Built or Remodeled
English Crossing	*	41,430	20	470	1994
Cougar Creek	10**	44,217	22	517	2003
Lakewood	*	45,400	16	376	1998/1997
TOTAL	*	131,047	58	1,363	

Middle School	Site Size (Acres)	Building Area (Square Feet)	Teaching Stations	Permanent Capacity	Year Built or Remodeled
Lakewood Middle	*	62,835	25	618	1971, 1994, and 2002

High School	Site Size (Acres)	Building Area (Square Feet)	Teaching Stations	Permanent Capacity	Year Built or Remodeled
Lakewood High	*	79,422	24	571	1982

*Note: All facilities are located on one 89-acre campus located at Tax Parcel No. 31053000100300.

**The Cougar Creek site is approximately 22 acres located at 16216 11th Ave NE, Arlington, WA 98223. Note that the presence of critical areas on the site does not allow full utilization at this site.

B. Relocatable Classrooms

Relocatable classrooms are used on an interim basis to house students until funding can be secured to construct permanent classrooms. The District currently uses 18 relocatable classrooms at various school sites throughout the District to provide additional interim capacity. A typical relocatable classroom can provide capacity for a full-size class of students. Current use of relocatable classrooms throughout the District is summarized in Table 2. Table 2 includes only those relocatable classrooms used for regular capacity purposes. The District’s relocatable classrooms have adequate useful remaining life and are evaluated regularly.

**Table 2
Relocatable Classroom (Portable) Inventory**

Elementary School	Relocatables	Interim Capacity
English Crossing	5	118
Cougar Creek	0	0
Lakewood	5	118
SUBTOTAL	10	236

Middle School	Relocatables	Interim Capacity
Lakewood Middle	1	26
SUBTOTAL	1	26

High School	Relocatables	Interim Capacity
Lakewood High	7	196
SUBTOTAL	7	196

TOTAL	18	458
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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 3.

**Table 3
Support Facility Inventory**

Facility	Building Area (Square Feet)
Administration	1,384
Business and Operations	1,152
Storage	2,456
Bus Garage	5,216
Maintenance Shop	4,096
Stadium	14,500

The District is also a party to a cooperative agreement for use of the Marysville School District transportation facility (which is owned by the Marysville School District).

D. Land Inventory

The District does not own any sites which are developed for uses other than schools and/or which are leased to other parties.

**SECTION 4
STUDENT ENROLLMENT PROJECTIONS**

The District’s October 1, 2015, reported enrollment was 2,275. Enrollment projections are most accurate for the initial years of the forecast period. Moving further into the future, more assumptions about economic conditions and demographic trends in the area affect the projection. Monitoring birth rates in Snohomish County and population growth for the area are essential yearly activities in the ongoing management of the capital facilities plan. In the event that enrollment growth slows, plans for new facilities can be delayed. It is much more difficult, however, to initiate new projects or speed projects up in the event enrollment growth exceeds the projection.

A. Six Year Enrollment Projections

Two enrollment forecasts were conducted for the District: an estimate by the Office of the Superintendent of Public Instruction (OSPI) based upon the cohort survival method; and an estimate based upon County population as provided by OFM (“ratio method”).

Based on the cohort survival methodology, a total of 2,001 students are expected to be enrolled in the District by 2021, a decrease from the October 2015 enrollment levels. Notably, the cohort survival method does not anticipate new students from new development patterns. So, it would not capture new development resulting from the rebound in the residential construction industry and as anticipated in the population forecasts prepared by Snohomish County.

OFM population-based enrollment projections were estimated for the District using OFM population forecasts for the County. The County provided the District with the estimated total population in the District by year. Between 2000 and 2015, the District’s student enrollment constituted approximately 17.10% of the total population in the District. Assuming that between 2016 and 2021, the District’s enrollment will continue to constitute 17.10% of the District’s total population and using OFM/County data, OFM/County methodology projects a total enrollment of 2,690 FTEs in 2021.

**Table 4
Projected Student Enrollment (FTE)
2016-2021**

Projection	Oct. 2015*	2016	2017	2018	2019	2020	2021	Change 2015-21	Percent Change 2015-21
OFM/County	2,275	2,344	2,413	2,482	2,551	2,620	2,690	415	18.24%
OSPI Cohort**	2,275	2,244	2,202	2,158	2,116	2,055	2,001	(274)	(12.0%)

* Actual FTE, October 2015

**Based upon the cohort survival methodology; complete projections located at Appendix A.

In addition to the OFM population-based enrollment projections, the District is aware of pending development within the District’s portion of the City of Marysville. This information is based on development applications filed with the City and does not consider additional projects that may be submitted to the City within the six years of this plan period. There are also several multi-family development projects under construction in the District at the present time.

Given these pending and in progress developments and the fact that the OSPI method does not incorporate the County’s planning data, the District has chosen to rely on the OFM population-based enrollment projections for purposes of planning for the District’s needs during the six years of this plan period. Future updates to the Plan may revisit this issue.

B. 2035 Enrollment Projections

Student enrollment projections beyond 2021 are highly speculative. Using OFM/County data as a base, the District projects a 2035 student FTE population of 3,127. This is based on the OFM/County data for the years 2000 through 2015 and the District’s average fulltime equivalent enrollment for the corresponding years (for the years 2000 to 2015, the District’s actual enrollment averaged 17.10% of the OFM/County population estimates). The total enrollment estimate was broken down by grade span to evaluate long-term needs for capital facilities.

Projected enrollment by grade span for the year 2035 is provided in Table 5. Again, these estimates are highly speculative and are used only for general planning purposes.

**Table 5
Projected Student Enrollment
2035**

Grade Span	FTE Enrollment – October 2015	Projected Enrollment 2035*
Elementary (K-5)	1,032	1,345
Middle School (6-8)	551	813
High School (9-12)	692	969
TOTAL (K-12)	2,275	3,127

*Assumes average percentage per grade span. See Table A-2.

Note: Snohomish County Planning and Development Service provided the underlying data for the 2035 projections.

**SECTION 5
CAPITAL FACILITIES NEEDS**

The projected available student capacity was determined by subtracting projected FTE student enrollment from permanent school capacity (i.e. excluding portables) for each of the six years in the forecast period (2016-2021).

Capacity needs are expressed in terms of “unhoused students.”

Projected future capacity needs are depicted on Table 6-A and are derived by applying the projected enrollment to the capacity existing in 2016. The method used to define future capacity needs assumes no new construction. For this reason, planned construction projects are not included at this point. This factor is added later (see Table 7).

This table shows actual space needs and the portion of those needs that are “growth related” for the years 2016-2021.

**Table 6-A*
Additional Capacity Needs
2015-2021**

Grade Span	2015**	2016-17	2017-18	2018-19	2019-20	2020-21	2021-22	Pct. Growth Related
Elementary (K-5)								
Total	0	0	0	0	0	0	0	
Growth Related	--	--	--	--	--	--	--	0%
Middle School (6-8)								
Total	0	0	9	27	45	63	81	
Growth Related	--	--	9	27	45	63	81	100%
High School								
Total	121	156	177	198	220	241	263	
Growth Related***	--	35	56	77	99	120	142	54%

*Please refer to Table 7 for capacity and projected enrollment information.

**Actual October 2015 Enrollment

***Existing deficiencies equal the “Total” less “Growth Related” capacity figures.

By the end of the six-year forecast period (2021), additional permanent classroom capacity will be needed as follows:

**Table 6-B
Unhoused Students**

Grade Span	Unhoused Students /Growth Related in Parentheses)
Elementary (K-5)	0 / (0)
Middle School (6-8)	81 / (81)
High School (9-12)	263 / (142)
TOTAL UNHOUSED (K-12)	344 / (223)

Again, planned construction projects are not included in the analysis in Table 6-B. In addition, it is not the District’s policy to include relocatable classrooms when determining future capital facility needs; therefore interim capacity provided by relocatable classrooms is not included in Table 6-B. However, Table 6-C incorporates the District’s current relocatable capacity (see Table 2) for purposes of identifying available capacity.

**Table 6-C
Unhoused Students – Mitigated with Relocatables**

Grade Span	2021 Unhoused Students /Growth Related in Parentheses)	Relocatable Capacity
Elementary (K-5)	0 / (0)	236
Middle School (6-8)	81 / (81)	268
High School (9-12)	263 / (142)	196
Total (K-12)	344 / (223)	458

Importantly, Table 6-C does not include relocatable adjustment that may be made to meet capacity needs. For example, the relocatable classrooms currently designated to serve elementary school needs could be used to serve high school capacity needs. Therefore, assuming no permanent capacity improvements are made, Table 6-C indicates that the District will have adequate interim capacity with the use of relocatable classrooms to house students during this planning period.

Projected permanent capacity needs are depicted in Table 7. They are derived by applying the District’s projected number of students to the projected capacity. Planned improvements by the District through 2021 are included in Table 7 and more fully described in Table 8.

**Table 7
Projected Student Capacity
2016-2021**

Elementary School Surplus/Deficiency

	Oct 2015 FTE	2016	2017	2018	2019	2020	2021
Existing Capacity	1,363	1,363	1,363	1,363	1,363	1,363	1,363
Added Permanent Capacity							
Total Capacity	1,363	1,363	1,363	1,363	1,363	1,363	1,363
Enrollment	1,032	1,008	1,038	1,067	1,097	1,127	1,157
Surplus (Deficiency)	331	355	325	296	266	236	206

Middle School Surplus/Deficiency

	Oct 2015 FTE	2016	2017	2018	2019	2020	2021
Existing Capacity	618	618	618	618	618	618	618
Added Permanent Capacity							
Total Capacity	618	618	618	618	618	618	618
Enrollment	551	609	627	645	663	681	699
Surplus (Deficiency)	67	9	(9)	(27)	(45)	(63)	(81)

High School Surplus/Deficiency

	Oct 2015 FTE	2016	2017	2018	2019	2020	2021
Existing Capacity	571	571	571	894	894	894	894
Added Permanent Capacity*			323				
Total Capacity	571	571	894	894	894	894	894
Enrollment	692	727	748	769	791	812	834
Surplus (Deficiency)	(121)	(156)	146	125	103	82	60

*Lakewood High School expansion. See Section 6 for project information.

See Appendix A for complete breakdown of enrollment projections.

See Table 6-A for a comparison of additional capacity needs due to growth versus existing deficiencies.

SECTION 6
CAPITAL FACILITIES FINANCING PLAN

A. *Planned Improvements*

In March 2000, the voters passed a \$14,258,664 bond issue for school construction and site acquisition. A new elementary school and a middle school addition were funded by that bond measure. These projects are complete. Based upon current needs, the District anticipates that it may need to consider the following acquisitions and/or improvements within the six years of this Plan. In April 2014, the District's voters approved a \$66,800,000 bond measure to fund improvements, including a capacity addition, at Lakewood High School.

Projects Adding Permanent Capacity:

- A three hundred (323) student expansion at Lakewood High School;
- A potential expansion at Lakewood Middle School, subject to future planning analysis and funding; and
- Acquisition and siting of portable facilities to accommodate growth needs.

Non-Capacity Adding Projects:

- High School modernization and improvements;
- Bus Garage improvements;
- Replace Administration Building;
- Replace Business Office Building.

Other:

- Land acquisition for future sites.

In the event that planned construction projects do not fully address space needs for student growth and a reduction in interim student housing, the Board could consider various courses of action, including, but not limited to:

- Alternative scheduling options;
- Changes in the instructional model;
- Grade configuration changes;
- Increased class sizes; or
- Modified school calendar.

Funding for planned improvements is typically secured from a number of sources including voter approved bonds, State School Construction Assistance funds, and impact fees. The potential funding sources are discussed below.

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. In March 2000, District voters approved a \$14,258,664 bond issue for school construction and site acquisition, which included funding of Cougar Creek Elementary School. In April 2014, the District's voters approved a \$66,800,000 bond measure to fund improvements, including a capacity addition, at Lakewood High School.

2. State School Construction Assistance

State School Construction Assistance 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 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 School Construction Assistance funds for specific capital projects based on a prioritization system. The District is eligible for State School Construction Assistance funds for certain projects at the 52.11% funding percentage level.

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.

4. Six Year Financing Plan

The Six-Year Financing Plan shown in Table 8 demonstrates how the District intends to fund new construction and improvements to school facilities for the years 2016-2021. The financing components include a bond issue, impact fees, and State Match funds. 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 or which remedy existing deficiencies.

**Table 8
Capital Facilities Plan**

Improvements Adding Permanent Capacity (Costs in Millions)

Project	2016	2017	2018	2019	2020	2021	Total Cost	Bonds/ Levy	State Funds	Impact Fees
Elementary School										
Middle School										
High School										
Lakewood High Addition		\$13.00	\$10.554				\$23.554	X	X	X
Secondary										
Site Acquisition			\$0.775				\$0.775	X		X

Improvements Not Adding Capacity (Costs in Millions)

Project	2016	2017	2018	2019	2020	2021	Total Cost	Bonds/ Levy	State Funds	Impact Fees
Elementary										
Middle School										
High School										
Lakewood High Modernization and Shop/Lab Replacement		\$19.544	\$4.000				\$23.544	X	X	
LHS Stadium, Track and Stadium Field Improvements	\$3.100						\$3.100	X	X	
District-wide										

Total Permanent Improvements (Costs in Millions)

	2016	2017	2018	2019	2020	2021	Total Cost	Bonds/ Levy	State Funds	Impact Fees
TOTAL	\$3.100	\$32.544	\$171.654				\$50.973	X	X	X

SECTION 7 SCHOOL IMPACT FEES

The GMA authorizes jurisdictions to collect impact fees to supplement funding of additional public facilities 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 in Snohomish County

The Snohomish County General Policy Plan (“GPP”) which implements the GMA sets certain conditions for school districts wishing to assess impact fees:

- The District must provide support data including: an explanation of the calculation methodology, a description of key variables and their computation, and definitions and sources of data for all inputs into the fee calculation.
- Such data must be accurate, reliable and statistically valid.
- Data must accurately reflect projected costs in the Six-Year Financing Plan.
- Data in the proposed impact fee schedule must reflect expected student generation rates from the following residential unit types: single family; multi-family/studio or 1-bedroom; and multi-family/2-bedroom or more.

Snohomish County established a school impact fee program in November 1997, and amended the program in December 1999. This program requires school districts to prepare and adopt Capital Facilities Plans meeting the specifications of the GMA. Impact fees calculated in accordance with the formula, which are based on projected school facility costs necessitated by new growth and are contained in the District’s CFP, become effective following County Council adoption of the District’s CFP.

B. Methodology and Variables Used to Calculate School Impact Fees

Impact fees are calculated utilizing the formula in the Snohomish County Impact Fee Ordinance. The resulting figures are based on the District’s cost per dwelling unit to purchase land for school sites, make site improvements, construct schools, and purchase/install relocatable facilities that add interim capacity needed to serve new development. A student factor (or student generation rate) is used to identify the average cost per dwelling unit by measuring the average number of students generated by each housing type (single-family dwellings and multi-family dwellings of one bedroom and two bedrooms or more). A description of the student methodology is contained in Appendix B. As required under the GMA, credits are applied in the formula to account for State School Construction Assistance funds to be reimbursed to the

District and projected future property taxes to be paid by the dwelling unit. The costs of projects that do not add capacity are not included in the impact fee calculations. Furthermore, because the impact fee formula calculates a “cost per dwelling unit”, an identical fee is generated regardless of whether the total new capacity project costs are used in the calculation or whether the District only uses the percentage of the total new capacity project costs allocated to the Districts growth-related needs, as demonstrated in Table 6-A. For purposes of this Plan, the District has chosen to use the full project costs in the fee formula. Furthermore, impact fees will not be used to address existing deficiencies. See Table 8 for a complete identification of funding sources.

The following projects are included in the impact fee calculation:

- A capacity addition at Lakewood High School.

Please see Table 8 and page 21 for relevant cost data related to each capacity project.

FACTORS FOR ESTIMATED IMPACT FEE CALCULATIONS

Student Generation Factors – Single Family

Elementary	.142
Middle	.142
High	.128
Total	.411

Student Generation Factors – Multi Family (1 Bdrm)

Elementary	.000
Middle	.000
High	.000
Total	.000

Student Generation Factors – Multi Family (2+ Bdrm)

Elementary	.206
Middle	.113
High	.074
Total	.399

Projected Student Capacity per Facility

High School (new addition) - 323

Required Site Acreage per Facility

Facility Construction/Cost Average

High School (Addition) \$23,553,551

Permanent Facility Square Footage

Elementary	131,047
Middle	62,835
High	79,422
Total	273,304

96.74%

Temporary Facility Square Footage

Elementary	5,120
Middle	512
High	3,584
Total	9,216

3.26%

Total Facility Square Footage

Elementary	136,167
Middle	63,347
High	83,006
Total	282,520

100.00%

Average Site Cost/Acre

Temporary Facility Capacity

Capacity
Cost

State Match Credit

Current State Match Percentage 52.11%

Construction Cost Allocation

Current CCA 213.23

District Average Assessed Value

Single Family Residence \$305,066

District Average Assessed Value

Multi Family (1 Bedroom) \$79,076

Multi Family (2+ Bedroom) \$115,893

SPI Square Footage per Student

Elementary 90
Middle 108
High 130

District Debt Service Tax Rate for Bonds

Current/\$1,000 \$2.13

General Obligation Bond Interest Rate

Current Bond Buyer Index 3.27%

Developer Provided Sites/Facilities

Value 0
Dwelling Units 0

C. *Proposed Lakewood School District Impact Fee Schedule*

Using the variables and formula described in subsection B, impact fees proposed for the District are summarized in Table 9. See also Appendix C.

**Table 9
School Impact Fees
Snohomish County, City of Arlington, City of Marysville**

Housing Type	Impact Fee Per Dwelling Unit
Single Family	\$857
Multi-Family (1 Bedroom)	\$0
Multi-Family (2+ Bedroom)	\$1,037

APPENDIX A

POPULATION AND ENROLLMENT DATA

Table A-1

**ACTUAL STUDENT ENROLLMENT 2010-2015
ACTUAL AND PROJECTED STUDENT ENROLLMENT 2016-2021
Based on OSPI Cohort Survival***

Grade	--- ACTUAL ENROLLMENTS ON OCTOBER 1st ---					AVERAGE % SURVIVAL	--- PROJECTED ENROLLMENTS ---						
	2010	2011	2012	2013	2014		2015	2016	2017	2018	2019	2020	2021
Snohomish/Lakewood(31306)													
Kindergarten	163	197	184	195	150	142		148	142	135	128	121	115
Grade 1	181	164	196	181	214	166	103.77%	147	154	147	140	133	126
Grade 2	158	179	153	197	183	221	99.41%	165	146	153	146	139	132
Grade 3	181	162	174	159	184	173	98.31%	217	162	144	150	144	137
Grade 4	171	175	159	181	168	174	99.81%	173	217	162	144	150	144
Grade 5	181	180	176	154	178	156	98.77%	172	171	214	160	142	148
K-5 Sub-Total	1,035	1,057	1,042	1,067	1,077	1,032		1,022	992	955	868	829	802
Grade 6	210	194	180	178	174	186	105.15%	164	181	180	225	168	149
Grade 7	193	200	182	182	181	174	98.36%	183	161	178	177	221	165
Grade 8	190	204	203	179	174	191	101.33%	176	185	163	180	179	224
6-8 Sub-Total	593	598	565	539	529	551		523	527	521	582	568	538
Grade 9	185	183	185	204	169	172	96.14%	184	169	178	157	173	172
Grade 10	181	187	176	178	195	176	98.63%	170	181	167	176	155	171
Grade 11	187	172	185	180	181	180	98.04%	173	167	177	164	173	152
Grade 12	180	189	165	182	167	164	95.74%	172	166	160	169	157	166
9-12 Sub-Total	733	731	711	744	712	692		699	683	682	666	658	661
DISTRICT K-12 TOTAL	2,361	2,386	2,318	2,350	2,318	2,275		2,244	2,202	2,158	2,116	2,055	2,001

Notes: Specific subtotaling on this report will be driven by District Grade spans.
School Facilities and Organization Printed Dec 03, 2015

* The cohort survival method of predicting future enrollment does not consider enrollment attributable to new development in the District. Enrollment projections are most accurate for the initial years of the forecast period.

Table A-2

**AVERAGE PERCENTAGE ENROLLMENT BY GRADE SPAN
(OSPI Enrollment Projections)**

Enrollment by Grade Span	Oct. 2015	2016	2017	2018	2019	2020	2021
Elementary (K-5)	1,032	1,022	992	955	868	829	802
Middle School (6-8)	551	523	527	521	582	568	538
High School (9-12)	692	699	683	682	666	658	661
TOTAL	2,253	2,234	2,225	2,225	2,214	2,230	2,249

Percentage by Grade Span	Oct. 2015	2016	2017	2018	2019	2020	2021
Elementary (K-5)	46%	46%	45%	44%	41%	40%	40%
Middle School (6-8)	24%	23%	24%	24%	28%	28%	27%
High School (9-12)	30%	31%	31%	32%	31%	32%	33%
TOTAL**	100%	100%	100%	100%	100%	100%	100%

Average Percentage by Grade Span	
Elementary (K-5)	43%
Middle School (6-8)	26%
High School (9-12)	31%
TOTAL	100%

Table A-3

**AVERAGE PERCENTAGE ENROLLMENT BY GRADE SPAN
(COUNTY/OFM Enrollment Projections)*****

Enrollment by Grade Span	Oct. 2015*	Avg. %age	2016	2017	2018	2019	2020	2021
Elementary (K-5)	1,032	43%	1,008	1,038	1,067	1,097	1,127	1,157
Middle School (6-8)	551	26%	609	627	645	663	681	699
High School (9-12)	692	31%	727	748	769	791	812	834
TOTAL**	2,275	100%	2,344	2,413	2,482	2,551	2,620	2,690

*Actual October 2015 Enrollment.

** Totals may vary due to rounding.

***Using average percentage by grade span.

APPENDIX B

STUDENT GENERATION FACTOR REVIEW



**DOYLE
CONSULTING**

ENABLING SCHOOL DISTRICTS TO MANAGE AND USE STUDENT ASSESSMENT DATA

Student Generation Rate Study for the Lakewood School District

4/25/2016

This document describes the methodology used to calculate student generation rates (SGRs) for the Lakewood School District, and provides results of the calculations.

SGRs were calculated for two types of residential construction: Single family detached, and multi-family with 2 or more bedrooms. Attached condominiums, townhouses and duplexes are included in the multi-family classification since they are not considered "detached". Manufactured homes on owned land are included in the single family classification.

1. Electronic records were obtained from the Snohomish County Assessor's Office containing data on all new construction within the Lakewood School District from January 2008 through December 2014. As compiled by the County Assessor's Office, this data included the address, building size, assessed value, and year built for new single and multi-family construction. The data was "cleaned up" by eliminating records which did not contain sufficient information to generate a match with the District's student record data (i.e. incomplete addresses).
2. The District downloaded student records data into Microsoft Excel format. This data included the addresses and grade levels of all K-12 students attending the Lakewood School District as of April 2016. Before proceeding, this data was reformatted and abbreviations were modified as required to provide consistency with the County Assessor's data.

3. **Single Family Rates:** The data on all new single family detached residential units in County Assessor's data were compared with the District's student record data, and the number of students at each grade level living in those units was determined. The records of 141 single family detached units were compared with data on 2,276 students registered in the District, and the following matches were found by grade level(s)*:

GRADE(S)	COUNT OF MATCHES	CALCULATED RATE
K	4	0.028
1	2	0.014
2	1	0.007
3	6	0.043
4	6	0.043
5	1	0.007
6	9	0.064
7	5	0.035
8	6	0.043
9	6	0.043
10	0	0.000
11	6	0.043
12	6	0.043
K-5	20	0.142
6-8	20	0.142
9-12	18	0.128
K-12	58	0.411

4. *Large Multi-Family Developments:* Snohomish County Assessor's data does not specifically indicate the number of units or bedrooms contained in large multi-family developments. Additional research was performed to obtain this information from specific parcel ID searches, and information provided by building management, when available. Information obtained included the number of 0-1 bedroom units, the number of 2+ bedroom units, and specific addresses of 0-1 bedroom units.

Small Multi-Family Developments: This method included all developments in the County Assessor's data containing four-plexes, tri-plexes, duplexes, condominiums and townhouses. This data contained information on the number of bedrooms for all townhouses and condominiums. Specific parcel ID searches were performed for duplex and larger units in cases where number of bedroom data was missing.

5. **Multi-Family 2+ BR Rates:** The multi-family 2+ BR SGR's were calculated by comparing data on 2+ BR multi-family units with the District's student record data, and the number of students at each grade level living in those units was determined. The records of 282 multi-family 2+ BR units were compared with data on 2,276 students registered in the District, and the following matches were found by grade level(s)*:

GRADE(S)	COUNT OF MATCHES	CALCULATED RATE
K	9	0.032
1	8	0.028
2	16	0.057
3	7	0.025
4	12	0.043
5	6	0.021
6	11	0.039
7	12	0.043
8	9	0.032
9	7	0.025
10	8	0.028
11	5	0.018
12	1	0.004
K-5	58	0.206
6-8	32	0.113
9-12	21	0.074
K-12	111	0.394

6. **Multi-Family 0-1 BR Rates:** Research indicated that 33 multi-family 0-1 BR units were constructed within District boundaries during the time period covered by this study. No specific unit number matches were made.

7. **Summary of Student Generation Rates*:**

	K-5	6-8	9-12	K-12
Single Family	.142	.142	.128	.411
Multi-Family 2+ BR	.206	.113	.074	.394

*Calculated rates for grade level groups may not equal the sum of individual grade rates due to rounding.

APPENDIX C

SCHOOL IMPACT FEE CALCULATIONS

DRAFT

School Impact Fee Calculation - Single Family Dwelling Unit

Lakewood School District 2016 CFP

School Site Acquisition Cost:

	<u>Site Size Acreage</u>	<u>Cost/ Acre</u>	<u>Facility Size</u>	<u>Site Cost/ Student</u>	<u>Student Factor</u>	<u>Cost/ SFDU</u>
Elementary	10	\$0	475	\$0	0.1420	\$0
Middle	20	\$0	600	\$0	0.1420	\$0
Senior	40	\$0	323	\$0	0.1280	\$0
TOTAL						\$0

School Construction Cost:

	<u>Sq. Ft. % Permanent</u>	<u>Facility Cost</u>	<u>Facility Size</u>	<u>Bldg. Cost/ Student</u>	<u>Student Factor</u>	<u>Cost/ SFDU</u>
Elementary	96.74%	\$0	475	\$0	0.1420	\$0
Middle	96.74%	\$0	600	\$0	0.1420	\$0
Senior	96.74%	\$23,553,561	323	\$72,921	0.1280	\$9,030
TOTAL						\$9,030

Temporary Facility Cost:

	<u>Sq. Ft. % Temporary</u>	<u>Facility Cost</u>	<u>Facility Size</u>	<u>Bldg. Cost/ Student</u>	<u>Student Factor</u>	<u>Cost/ SFDU</u>
Elementary	3.26%	\$0	25	\$0	0.1420	\$0
Middle	3.26%	\$0	25	\$0	0.1420	\$0
Senior	3.26%	\$0	25	\$0	0.1280	\$0
TOTAL						\$0

State School Construction Funding Assistance Credit:

	<u>Const Cost Allocation</u>	<u>OSPI Sq. Ft./ Student</u>	<u>Funding Assistance</u>	<u>Credit/ Student</u>	<u>Student Factor</u>	<u>Cost/ SFDU</u>
Elementary	213.23	90.0	0.00%	\$0	0.1420	\$0
Middle	213.23	108.0	0.00%	\$0	0.1420	\$0
Senior	213.23	130.0	52.11%	\$14,445	0.1280	\$1,849
TOTAL						\$1,849

School Impact Fee Calculation - Single Family Dwelling Unit

Lakewood School District 2016 CFP

Tax Payment Credit Calculation:

Average SFR Assessed Value	\$305,066
Current Capital Levy Rate/\$1000	\$2.13
Annual Tax Payment	\$649.79
Years Amortized	10
Current Bond Interest Rate	3.27%
Present Value of Revenue Stream	\$5,467

Impact Fee Summary - Single Family Dwelling Unit:

Site Acquisition Cost	\$0
Permanent Facility Cost	\$9,030
Temporary Facility Cost	\$0
State SCFA Credit	(\$1,849)
Tax Payment Credit	(\$5,467)
Unfunded Need	\$1,713
50% Required Adjustment	\$857

Single Family Impact Fee	\$857
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School Impact Fee Calculation - Multi-Family Dwelling Unit

Lakewood School District 2016 CFP

School Site Acquisition Cost:

	<u>Site Size Acreage</u>	<u>Cost/ Acre</u>	<u>Facility Size</u>	<u>Site Cost/ Student</u>	<u>Student Factor</u>	<u>Cost/ MFDU</u>
Elementary	10	\$0	475	\$0	0.2060	\$0
Middle	20	\$0	600	\$0	0.1130	\$0
Senior	40	\$0	323	\$0	0.0740	\$0
TOTAL						\$0

School Construction Cost:

	<u>Sq. Ft. % Permanent</u>	<u>Facility Cost</u>	<u>Facility Size</u>	<u>Bldg. Cost/ Student</u>	<u>Student Factor</u>	<u>Cost/ MFDU</u>
Elementary	96.74%	\$0	475	\$0	0.2060	\$0
Middle	96.74%	\$0	600	\$0	0.1130	\$0
Senior	96.74%	\$23,553,561	323	\$72,921	0.0740	\$5,220
TOTAL						\$5,220

Temporary Facility Cost:

	<u>Sq. Ft. % Temporary</u>	<u>Facility Cost</u>	<u>Facility Size</u>	<u>Bldg. Cost/ Student</u>	<u>Student Factor</u>	<u>Cost/ MFDU</u>
Elementary	3.26%	\$0	23	\$0	0.2060	\$0
Middle	3.26%	\$0	30	\$0	0.1130	\$0
Senior	3.26%	\$0	32	\$0	0.0740	\$0
TOTAL						\$0

State School Construction Funding Assistance Credit:

	<u>Const Cost Allocation</u>	<u>OSPI Sq. Ft./ Student</u>	<u>Funding Assistance</u>	<u>Credit/ Student</u>	<u>Student Factor</u>	<u>Cost/ MFDU</u>
Elementary	213.23	90.0	0.00%	\$0	0.2060	\$0
Middle	213.23	108.0	0.00%	\$0	0.1130	\$0
Senior	213.23	130.0	52.11%	\$14,445	0.0740	\$1,069
TOTAL						\$1,069

School Impact Fee Calculation - Multi-Family Dwelling Unit

Lakewood School District 2016 CFP

Tax Payment Credit Calculation:

Average MFR Assessed Value	\$115,893
Current Capital Levy Rate/\$1000	\$2.13
Annual Tax Payment	\$246.85
Years Amortized	10
Current Bond Interest Rate	3.27%

Present Value of Revenue Stream	\$2,077
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Impact Fee Summary - Multi-Family Dwelling Unit:

Site Acquisition Cost	\$0
Permanent Facility Cost	\$5,220
Temporary Facility Cost	\$0
State SCFA Credit	(\$1,069)
Tax Payment Credit	(\$2,077)

Unfunded Need	\$2,074
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50% Required Adjustment	\$1,037
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Multi-Family Impact Fee	\$1,037
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