
LAKEWOOD SCHOOL DISTRICT NO. 306

CAPITAL FACILITIES PLAN

2020-2025

DRAFT

Adopted: _____, 2020
May 2020 Draft

LAKEWOOD SCHOOL DISTRICT NO. 306

CAPITAL FACILITIES PLAN

2020-2025

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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 (2020-2025).

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. In the event that impact fees are not available due to action by the

state, county or cities within the District, the District in a future CFP update must identify alternative funding sources to replace the intended impact fee funding.

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

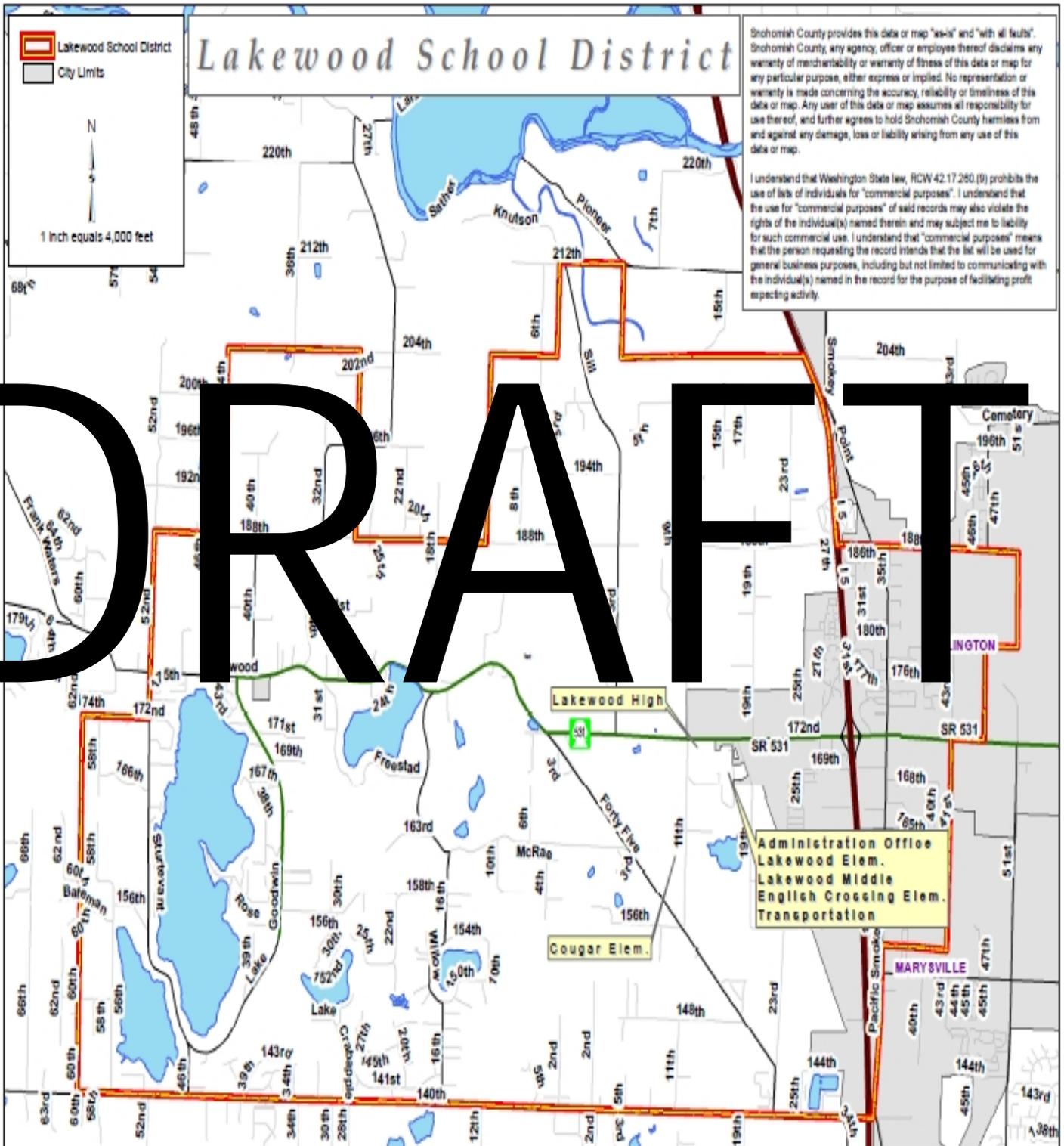
Snohomish County’s Countywide Planning Policies direct jurisdictions in Snohomish County to “ensure the availability of sufficient land and services for future K-20 school needs.” Policy ED-11. The District appreciates any opportunity for cooperative planning efforts with its jurisdictions.

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 2,514 (October 1, 2019, reported OSPI 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 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 educational program standards contained in this CFP reflect the District's implementation of requirements for full-day kindergarten and 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. New schools are 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 19 students.
- Class size for grade 5th 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 may also request that development be deferred until planned facilities can be completed to meet the needs of the incoming population; however, the District has no control over the ultimate land use decisions made by the permitting jurisdictions.

The District’s minimum level of service (“MLOS”) is as follows: on average, K-4 classrooms have no more than 24 students per classroom, 5-8 classrooms have no more than 26 students per classroom, and 9-12 classrooms have no more than 28 students per classroom. The District sets 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 24 students per classroom, 5-8 classrooms have more than 28 students per classroom, or 9-12 classrooms more than 30 students per classroom. 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 MLOS is not the District’s desired or accepted operating standard.

For 2017-18 and 2018-19, the District’s compliance with the MLOS was as follows (with MLOS set as applicable for those school years):

2017-18 School Year						
LOS Standard	MINIMUM LOS# Elementary^	REPORTED LOS Elementary	MINIMUM LOS Middle	REPORTED LOS Middle	MINIMUM LOS High	REPORTED LOS High
	26	19.06	28	22.88	30	21.47

* 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).

2018-19 School Year						
LOS Standard	MINIMUM LOS# Elementary^	REPORTED LOS Elementary	MINIMUM LOS Middle	REPORTED LOS Middle	MINIMUM LOS High	REPORTED LOS High
	26	19.16	28	23.08	30	22.00

* The District determines the reported MLOS 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 and reflects the District’s updated educational program standards (reduced K-4 class size) and recently completed capacity addition at Lakewood High School.

Relocatable classrooms are not viewed by the District as a solution for housing students on a permanent basis. Therefore, these facilities are not included 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	403	1994
Cougar Creek	10**	44,217	22	444	2003
Lakewood	*	45,400	16	323	1958, 1997
TOTAL	*	131,047	58	1,170	

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	*	169,000	34	850	1982, 2020

*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 15 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	Relocatable Classrooms	Interim Capacity
English Crossing	2	40
Cougar Creek	4	80
Lakewood	6	120
SUBTOTAL	12	240

Middle School	Relocatable Classrooms	Interim Capacity
Lakewood Middle	3	78
SUBTOTAL	3	78

High School	Relocatable Classrooms	Interim Capacity
Lakewood High	0	0
SUBTOTAL	0	0

TOTAL	15	318
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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/Maintenance Shop	5,216
Stadium	14,304

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, 2019, reported enrollment was 2,514. 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 a modified cohort enrollment forecast prepared by a demographer. The District also estimated enrollment based upon adopted Snohomish County population forecasts ("ratio method").

Based on the cohort survival methodology, a total of 2,968 students are expected to be enrolled in the District by 2025, a notable increase from the October 2019 enrollment levels. Notably, the cohort survival method is not designed to anticipate fluctuations in development patterns. The cohort method has not proven to be a reliable measure for the Lakewood School District. For example, the cohort projection in 2017 predicted that the District's October 2019 enrollment would be 2,423, about 91 fewer students than the actual October 2019 enrollment figures. The 2019 cohort projections for 2025, however, show a 19.1% projected increase by the 2025 school year.

The District obtained in 2020 an enrollment forecast from a professional demographer, FLO Analytics. Based on this analysis, a total enrollment of 2,888, or 374 additional students, are expected by the 2025-26 school year. This projection is an increase of nearly 15% over 2019 enrollment. Growth is projected at all three grade levels. The FLO Analytics forecast utilizes historic enrollment patterns, demographic and land use analysis based upon information from Snohomish County and the cities of Arlington and Marysville, census data, OFM forecasts, and Washington State Department of Health birth data. The detailed FLO Analytics forecast report is on file with the District.

Snohomish County provides OFM population-based enrollment projections for the District using OFM population forecasts as adopted by the County. The County provided the District with the estimated total population in the District by year. Between 2012 and 2019, the District's student enrollment constituted approximately 15.74% of the total population in the District. Assuming that between 2020 and 2025, the District's enrollment will continue to constitute 15.74% of the District's total population and using OFM/County data, OFM/County methodology projects a total enrollment of 2,743 students in 2025.

The comparison of OSPI cohort, District projections, and OFM/County projected enrollments is contained in Table 4.

Table 4
Projected Student Enrollment (FTE)
2020-2025

Projection	Oct. 2019*	2020	2021	2022	2023	2024	2025	Change 2019-25	Percent Change 2019-25
OFM/County	2,514	2,552	2,590	2,628	2,666	2,704	2,743	229	9.1%
OSPI Cohort**	2,514	2,573	2,660	2,712	2,808	2,885	2,968	454	18.1%
District***	2,514	2,527	2,584	2,667	2,760	2,831	2,888	374	14.88%

* Actual reported enrollment, October 2019

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

***FLO Analytics (2020); grade level projections located in Appendix A.

The District is aware of notable pending residential development within the District. Specifically, nearly 300 multi-family units are planned for or currently in construction over the next five year period within the District’s portion of the City of Arlington. In the District’s portion of the City of Marysville, there is ongoing multifamily and single family development are currently under construction. Sustained low to moderate levels of single family development are projected within the District through the next ten years.

Given the District-specific detailed analysis contained in the FLO Analytics report, the District is relying on the projections in that report 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 2025 are highly speculative. Using OFM/County data as a base, the District projects a 2035 student FTE population of 2,878. This is based on the OFM/County data for the years 2012 through 2019 and the District’s average fulltime equivalent enrollment for the corresponding years (for the years 2012 to 2019, the District’s actual enrollment averaged 15.74% 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 2019	Projected Enrollment 2035*
Elementary (K-5)	1,094	1,253
Middle School (6-8)	652	746
High School (9-12)	768	879
TOTAL (K-12)	2,514	2,878

*Assumes average percentage per grade span remains constant between 2029 and 2035. See Appendix, Table A-2.

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

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**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 (2020-2025).

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 the 2019-20 school year. 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 2020-2025. Note that this chart is misleading as it reads out growth-related capacity needs related to recent growth within the District.

Table 6-A*
Additional Capacity Needs
2019-2025

Grade Span	2019**	2020-21	2021-22	2022-23	2023-24	2024-25	2025-26	Pct. Growth Related
Elementary (K-5)								
Total	0	0	0	0	28	24	9	
Growth Related	--	--	--	--	28	24	9	100%
Middle School (6-8)								
Total	0	0	0	0	0	42	42	
Growth Related	--	--	--	--	--	42	42	100%
High School								
Total	0	0	0	45	69	75	112	
Growth Related***	--	--	--	45	69	75	112	100%

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

**Actual October 2019 Enrollment

***Additional “Growth Related Capacity Needs” equal the “Total” for each year less “deficiencies” existing as of 2019. Existing deficiencies as of 2019 include capacity needs related to recent growth from new development through that date.

By the end of the six-year forecast period (2025), 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)	9/(9)
Middle School (6-8)	42/(42)
High School (9-12)	112/(112)
TOTAL UNHOUSED (K-12)	163/(163)

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	2025 Unhoused Students /Growth Related in Parentheses)	Relocatable Capacity
Elementary (K-5)	9/(9)	240
Middle School (6-8)	42/(42)	78
High School (9-12)	112/(112)	0
Total (K-12)	163(163)	318

Importantly, Table 6-C does not include relocatable adjustments 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 2025 are included in Table 7 and more fully described in Table 8.

**Table 7
Projected Student Capacity
2020-2025**

Elementary School Surplus/Deficiency

	Oct 2019*	2020	2021	2022	2023	2024	2025
Existing Capacity	1,170	1,170	1,170	1,170	1,170	1,170	1,170
Added Permanent Capacity							162^
Total Permanent Capacity	1,170	1,170	1,170	1,170	1,170	1,170	1,332
Enrollment`	1,094	1,103	1,138	1,163	1,198	1,194	1,179
Surplus (Deficiency)	76	67	32	7	(28)	(24)	153

* Reported October 2019 enrollment

^ Capacity Addition at Lakewood Elementary

Middle School Surplus/Deficiency

	Oct 2019*	2020	2021	2022	2023	2024	2025
Existing Capacity	618	670	670	670	670	670	670
Added Permanent Capacity	52**						198^
Total Permanent Capacity	670	670	670	670	670	670	868
Enrollment	652	634	621	608	643	712	747
Surplus (Deficiency)	18	36	49	62	27	(42)	121

* Reported October 2019 enrollment

**Addition of STEM Lab and 2 classrooms in Spring 2020

^ Capacity Addition at Lakewood Middle School

High School Surplus/Deficiency

	Oct 2019*	2020	2021	2022	2023	2024	2025
Existing Capacity	571	850	850	850	850	850	850
Added Permanent Capacity*	279**						
Total Permanent Capacity	850	850	850	850	850	850	850
Enrollment	768	790	826	895	919	925	962
Surplus (Deficiency)	82	60	24	(45)	(69)	(75)	(112)

* Reported October 2019 enrollment

**Lakewood High School expansion in 2017. 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.

Table 7 does not include existing, relocated, or added portable facilities.

**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. 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, which opened in the fall of 2017. 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.

Projects Adding Permanent Capacity:

- Addition of STEM Lab and two classrooms at Lakewood Middle School (spring 2020);
- A planned expansion at Lakewood Elementary School, to create a preschool and early center in order to free up space for K-5 classrooms, subject to future planning analysis and funding; and
- A planned 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:

- Transportation Facility expansion to Operations Center; and
- Administration Building improvements.

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 State deposits revenue from the sale of renewable resources from State school lands set aside by the Enabling Act of 1889 into the Common School Account. If these sources are insufficient to meet needs, the Legislature can appropriate General Obligation Bond funds or the Superintendent of Public Instruction can prioritize projects for funding. 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 Program (SCAP) funds for certain projects at the 58.12% funding percentage level. The District does not anticipate being eligible for SCAP funds for the projects planned in this CFP.

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 2020-2025. 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	2020	2021	2022	2023	2024	2025	Total Cost	Bonds/ Levy/ Other Local	State Funds	Impact Fees
Elementary School Lakewood El Addition					\$4.0	\$4.0	\$8.00	X		X
Middle School STEM Lab and Class Room Addition at LMS	\$0.550						\$0.555	X		X
Lakewood MS Addition					\$6.0	\$6.0	\$12.00	X		X
High School										
Portables			\$0.250	\$0.750			\$1.000			X
Site Acquisition			\$0.775				\$0.775	X		X

Improvements Not Adding Capacity (Costs in Millions)

Project	2020	2021	2022	2023	2024	2025	Total Cost	Bonds/ Levy/ Other Local	State Funds	Impact Fees
Elementary										
Middle School										
High School										
District Operations Center							\$3.0	X		
District Office							\$7.0-10.0	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:

- Capacity additions at Lakewood Elementary School and Lakewood Middle School.
- Portable acquisition costs at the High School level.

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

FACTORS FOR ESTIMATED IMPACT FEE CALCULATIONS

Student Generation Factors – Single Family

Elementary	.193
Middle	.060
High	.048
Total	.301

Student Generation Factors – Multi Family (1 Bdrm)

Elementary	.033
Middle	.017
High	.010
Total	.050

Student Generation Factors – Multi Family (2+ Bdrm)

Elementary	.063
Middle	.045
High	.063
Total	.170

Projected Student Capacity per Facility

Lakewood El (addition) – 162
Lakewood MS (addition) – 198

Required Site Acreage per Facility

Facility Construction/Cost Average

Lakewood El (Addition)	\$8,000,000
Lakewood MS (Addition)	\$12,000,000

Permanent Facility Square Footage

Elementary	131,047
Middle	62,835
High	169,000
Total	362,882
	97.12%

Temporary Facility Square Footage

Elementary	6,656
Middle	512
High	3,584
Total	10,752
	2.88%

Total Facility Square Footage

Elementary	137,703
Middle	63,347
High	172,584
Total	373,634
	100.00%

Average Site Cost/Acre

N/A

Temporary Facility Capacity

Capacity	20/26
Cost	\$250,000

State Match Credit

Current State Match Percentage	58.12%
	(not expected)

Construction Cost Allocation

Current CCA	238.22
-------------	--------

District Average Assessed Value

Single Family Residence	\$420,840
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District Average Assessed Value

Multi Family (1 Bedroom)	\$125,314
--------------------------	-----------

Multi Family (2+ Bedroom)	\$178,051
---------------------------	-----------

SPI Square Footage per Student

Elementary	90
Middle	108
High	130

District Debt Service Tax Rate for Bonds

Current/\$1,000	\$1.55
-----------------	--------

General Obligation Bond Interest Rate

Bond Buyer Index (avg February 2020)	2.44%
--------------------------------------	-------

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	\$3,566
Multi-Family (1 Bedroom)	\$445
Multi-Family (2+ Bedroom)	\$1,641

**Table 9 reflects a 50% adjustment to the calculated fee as required by local ordinances.*

APPENDIX A

POPULATION AND ENROLLMENT DATA

DRAFT

Table A-1

**ACTUAL STUDENT ENROLLMENT 2014-2019
PROJECTED STUDENT ENROLLMENT 2020-2025
Based on OSPI Cohort Survival***



School Facilities and Organization
INFORMATION AND CONDITION OF SCHOOLS
Enrollment Projections (Report 1049)

Snohomish/Lakewood(31306)

Grade	--- ACTUAL ENROLLMENTS ON OCTOBER 1st ---						AVERAGE % SURVIVAL	--- PROJECTED ENROLLMENTS ---					
	2014	2015	2016	2017	2018	2019		2020	2021	2022	2023	2024	2025
Kindergarten	150	142	162	175	178	188		197	206	215	224	232	241
Grade 1	214	166	159	176	179	183	107.27%	202	211	221	231	240	249
Grade 2	183	221	167	173	190	177	103.90%	190	210	219	230	240	249
Grade 3	184	173	227	174	166	194	99.89%	177	190	210	219	230	240
Grade 4	168	174	174	231	175	179	101.05%	196	179	192	212	221	232
Grade 5	178	156	182	177	223	173	98.90%	177	194	177	190	210	219
K-5 Sub-Total	1,077	1,032	1,071	1,106	1,111	1,094		1,139	1,190	1,234	1,306	1,373	1,430
Grade 6	174	186	181	192	186	235	107.29%	186	190	208	190	204	225
Grade 7	181	174	202	174	206	204	104.33%	245	194	198	217	198	213
Grade 8	174	191	187	206	185	213	104.93%	214	257	204	208	228	208
6-8 Sub-Total	529	551	570	572	577	652		645	641	610	615	630	646
Grade 9	169	172	199	176	217	192	101.25%	216	217	260	207	211	231
Grade 10	195	176	170	207	171	220	101.10%	194	218	219	263	209	213
Grade 11	181	180	179	173	203	174	99.11%	218	192	216	217	261	207
Grade 12	167	164	170	174	157	182	92.52%	161	202	178	200	201	241
9-12 Sub-Total	712	692	718	730	748	768		789	829	873	887	882	892
DISTRICT K-12 TOTAL	2,318	2,275	2,359	2,408	2,436	2,514		2,573	2,660	2,717	2,808	2,885	2,968

Notes: Specific subtotalling on this report will be driven by District Grade spans.

Table A-2

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

Enrollment by Grade Span	Oct. 2019*	Avg. %age	2020	2021	2022	2023	2024	2025
Elementary (K-5)	1,094	43.52%	1,111	1,127	1,144	1,160	1,177	1,194
Middle School (6-8)	652	25.93%	662	672	681	691	701	711
High School (9-12)	768	30.55%	779	791	803	815	826	838
TOTAL**	2,514	100%	2,552	2,590	2,628	2,666	2,704	2,743

*Actual October 2019 Enrollment.

** Totals may vary due to rounding.

***Using average percentage by grade span.

Table A-3

**PROJECTED ENROLLMENT BY GRADE SPAN
(DISTRICT - FLO Analytics)****

Grade	2019	2020	2021	2022	2023	2024	2025	2026	2027	2028	2029
K	188	143	171	170	159	166	170	173	175	177	179
1	183	188	146	176	175	164	170	175	178	180	182
2	177	205	213	169	205	203	190	197	203	207	209
3	194	176	204	219	174	211	209	195	203	209	213
4	179	218	197	236	252	202	244	241	226	235	242
5	173	173	207	193	233	248	196	240	237	222	231
6	235	180	182	219	204	248	260	206	254	251	235
7	204	243	185	193	233	216	260	273	216	270	267
8	213	212	254	196	206	248	227	275	289	229	289
9	192	212	210	260	200	212	255	230	272	291	232
10	220	203	225	230	283	219	231	277	244	296	317
11	174	212	193	221	226	280	214	226	260	240	293
12	182	163	198	185	209	215	263	204	205	245	227
K-5	1,094	1,103	1,138	1,163	1,198	1,194	1,179	1,222	1,223	1,230	1,256
6-8	652	634	621	608	643	712	747	754	759	749	791
9-12	768	790	826	895	919	925	962	936	981	1,072	1,068
K-12	2,514	2,527	2,584	2,667	2,760	2,831	2,888	2,912	2,963	3,052	3,115

Annual District attendance area residence-based forecasts grade totals through 2029. Shown are 2019 actual counts of District students attending in each grade (October), as well as October 1st forecasts for each subsequent year. After SIS/HC adjustments. Prior to FTE adjustments.

APPENDIX B

STUDENT GENERATION FACTOR REVIEW

DRAFT



MEMORANDUM

To: Dale Leach
Director of Learning Support and Operations
Lakewood School District #306

Date: March 13, 2020
Project: F1867.01.01

From: Tyler Vick
Managing Director

Jerry Oelerich
Analyst

DRAFT

RE: Student Generation Report, Lakewood School District

This document outlines the methodology that FLO Analytics used to create the Student Generation Report (SGR) study for Lakewood School District (the District). Also contained in the report are the processes for evaluation used for identifying the place of existing information from The Bridge Apartments. Finally, SGRs for single-family, 0-1 bedroom multifamily units, and 2 or more bedroom multifamily units are presented at the individual grade level and grade groups.

METHODS:

January 2015 to December 2019 residential records were obtained from the Snohomish County Assessor's office. The data includes information regarding the building size, room count, assessed value and year built, along with a significant amount of other structural data. Data that contained incomplete records or did not coincide with a visual inspection were removed from the final database prior to the calculations. These data were then joined to the Snohomish County parcel data to create a map of all new construction through the past five years. Senior housing was not included in the analysis.

SGRs were calculated for single-family detached, multifamily with 1 bedroom, and multifamily with 2+ bedrooms. Within the 2015 to 2019 timeframe, no condominiums, townhouses, or duplexes (or variations thereof) were constructed, according to data obtained from the Snohomish County Assessor's Office. One manufactured home record does show up within the time frame, and would have been included as a single-family residence, but further investigation indicates the structures were present three years prior to the start of the study period. Assessor's office data also show that mobile home senior facilities were constructed between 2015 and 2019, however, historical imagery indicates these structures have been in place for 15 plus years.

FLO Analytics geocoded all October 1, 2019, Kindergarten(K)–12 students from the Student Information System, provided by the District, and selected those that live within the district boundary. The student address points were then compared to the 2015–2019 new construction data. In two instances, geocoded student points fell outside of any of the new construction polygons. In response, the student addresses were verified against the addresses of the nearby apartments and then moved into their correct location. These two datasets were then spatially joined to create a record that indicates the type of development and the number of students living at that location along with all pertinent data for this report, including current grade level.

Multifamily Developments: While single-family data is nearly completely accounted for within the Assessor’s data, there are significant data gaps with regard to multifamily information; the number of bedrooms within the building is not included. Additional research was needed to find the number of units and the breakdown of units by bedroom count. Student data includes the unit that they are living in.

Five reached out to five new multifamily construction projects in order to ascertain the bedroom count of each of the units, which could then be cross-referenced with student residence data to determine the number of bedrooms in the units that generate students. No student information of any form was shared in these discussions. Bedroom count by unit information was received from Villas at Arlington and Twin Lakes Landing.

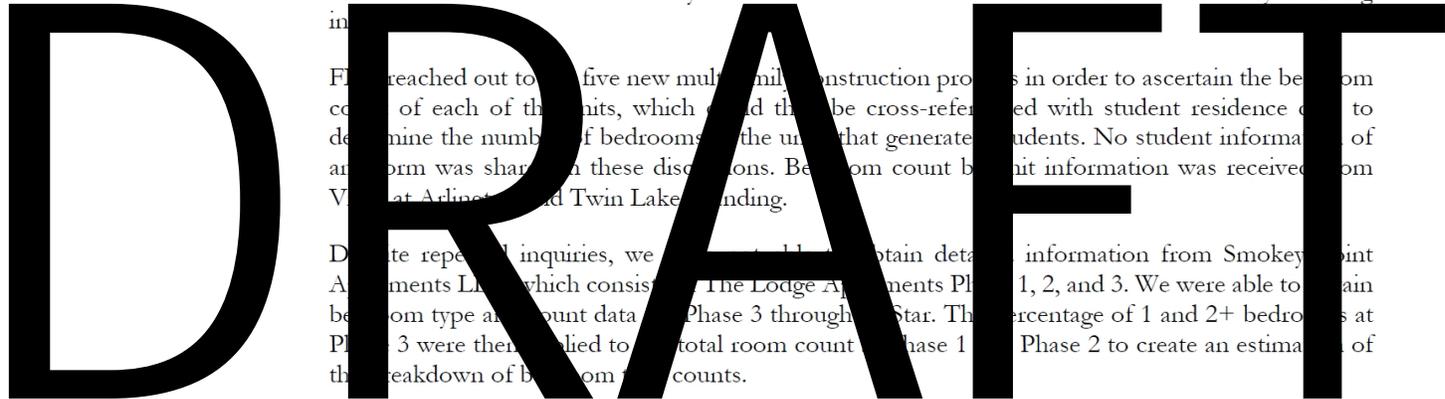
Despite repeated inquiries, we were unable to obtain detailed information from Smokey Point Apartments LLC, which consists of The Lodge Apartments Phases 1, 2, and 3. We were able to obtain bedroom type and count data for Phase 3 through Star. The percentage of 1 and 2+ bedrooms at Phase 3 were then applied to the total room count for Phase 1 and Phase 2 to create an estimation of the breakdown of bedroom counts.

With no clear knowledge of which students were living in what type of unit for The Lodge Apartments, additional estimations were needed in order to calculate a student-per-bedroom-type rate. This rate was calculated for Villas at Arlington and Twin Lakes Landing, who provided a complete dataset, and then applied to the estimation of bedroom type counts at The Lodge Phase 1, 2, and known data at Phase 3. The end result is the student-per-bedroom-type rate for all Phases at The Lodge Apartments.

Prior to creating the student-per-bedroom-type rate for The Lodge, any unit at the three complexes that had two or more students living in it were assigned a designation of a 2+ bedroom unit.

RESULTS:

Single-Family Rates: The data on all new single-family detached residential units in the Snohomish 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 83 single-family detached units were compared with data on 2,073 students registered in the District, and the following matches were found by grade level(s).



GRADE	MATCHES	RATE
K	4	0.048
1	3	0.036
2	3	0.036
3	2	0.024
4	3	0.036
5	1	0.012
6	1	0.012
7	1	0.012
8	3	0.036
9	0	0.000
10	3	0.036
11	0	0.000
12	1	0.012
K-5		
K-5	16	0.192
6-8		
6-8	5	0.060
9-12		
9-12	4	0.048
K-12		
K-12	25	0.300

Multifamily 0 to 1 Bedroom R Rates: The multifamily 0 to 1 bedroom R's were calculated by comparing the 0.11% in multifamily units with the district's student data, and the number of students at the grade level living in those units was determined. As of this writing, it is estimated that 200-1 bedroom units in total were built from 2015 to 2019. Matches to current student data are indicated in the table below.

GRADE	MATCHES	RATE
K	1	0.003
1	2	0.007
2	2	0.007
3	1	0.003
4	3	0.010
5	1	0.003
6	1	0.003
7	1	0.003
8	0	0.000
9	0	0.000
10	1	0.003
11	2	0.007
12	0	0.000
K-5		
K-5	10	0.033
6-8		
6-8	2	0.007
9-12		
9-12	3	0.010
K-12		
K-12	15	0.050

APPENDIX C

SCHOOL IMPACT FEE CALCULATIONS

DRAFT

SCHOOL IMPACT FEE CALCULATIONS									
DISTRICT	Lakewood School District								
YEAR	2020								
School Site Acquisition Cost:									
((AcresxCost per Acre)/Facility Capacity)xStudent Generation Factor									
	Facility	Cost/	Facility	Student	Student	Student	Cost/	Cost/	Cost/
	Acres	Acre	Capacity	SFR	MFR (1)	MFR (2+)	SFR	MFR (1)	MFR (2+)
Elementary	10.00	\$ -	475	0.193	0.033	0.063	\$0	\$0	\$0
Middle	20.00	\$ -	600	0.060	0.017	0.045	\$0	\$0	\$0
High	40.00	\$ -	800	0.048	0.010	0.063	\$0	\$0	\$0
						TOTAL	\$0	\$0	\$0
School Construction Cost:									
((Facility Cost/Facility Capacity)xStudent Generation Factor)x(permanent/Total Sq Ft)									
	Facility	Cost/	Facility	Student	Student	Student	Cost/	Cost/	Cost/
	Sq.Ft.	Sq.Ft.	Capacity	SFR	MFR (1)	MFR (2+)	SFR	MFR (1)	MFR (2+)
Elementary	97.12%	\$ 8,000	161	0.193	0.033	0.063	\$9,314	\$1,593	\$3,040
Middle	97.12%	\$ 12,000	198	0.060	0.017	0.045	\$3,532	\$1,001	\$2,649
High	97.12%	\$ 25,000	250	0.048	0.010	0.063	\$0	\$0	\$0
						TOTAL	\$12,846	\$2,593	\$5,689
Temporary Facility Cost:									
(Facility Cost/Facility Capacity)xStudent Generation Factor)x(Temporary/Total Square Footage)									
	Temp/	Facility	Facility	Student	Student	Student	Cost/	Cost/	Cost/
	Sq.Ft.	Size	Size	SFR	MFR (1)	MFR (2+)	SFR	MFR (1)	MFR (2+)
Elementary	2.88%	20	161	0.193	0.033	0.063	\$0	\$0	\$0
Middle	2.88%	26	198	0.060	0.017	0.045	\$0	\$0	\$0
High	2.88%	28	250	0.048	0.010	0.063	\$12	\$3	\$16
						TOTAL	\$12	\$3	\$16
State School Construction Funding Assistance Credit:									
CCA X SPI Square Footage X District Funding Assistance % X Student Factor									
	CCA	SPI	Funding	Student	Student	Student	Cost/	Cost/	Cost/
		Footage	Asst %	SFR	MFR (1)	MFR (2+)	SFR	MFR (1)	MFR (2+)
Elementary	\$ 238.22	90	0.00%	0.193	0.000	0.063	\$0	\$0	\$0
Middle	\$ 238.22	108	0.00%	0.060	0.017	0.045	\$0	\$0	\$0
High	\$ 238.22	130	0.00%	0.048	0.010	0.063	\$0	\$0	\$0
						TOTAL	\$0	\$0	\$0
Tax Payment Credit:									
							SFR	MFR (1)	MFR (2+)
Average Assessed Value							\$420,840	\$125,314	\$178,051
Capital Bond Interest Rate							2.44%	2.44%	2.44%
Net Present Value of Average Dwelling							\$3,694,664	\$1,100,164	\$1,563,156
Years Amortized							10	10	10
Property Tax Levy Rate							\$1.55	\$1.55	\$1.55
Present Value of Revenue Stream							\$5,727	\$1,705	\$2,423
Fee Summary:									
				Single	Multi-	Multi-			
				Family	Family (1)	Family (2+)			
				\$0	\$0	\$0			
				\$12,846	\$2,593	\$5,689			
				\$12	\$3	\$16			
				\$0	\$0	\$0			
				(\$5,727)	(\$1,705)	(\$2,423)			
				\$7,131	\$890	\$3,282			
				\$3,566	\$445	\$1,641			

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