

CITY OF MARYSVILLE

EXECUTIVE SUMMARY FOR ACTION

CITY COUNCIL MEETING DATE: November 9, 2020

AGENDA ITEM: PA 20-040 – Marysville, Lake Stevens, and Lakewood School Districts’ Capital Facilities Plan (CFPs)	AGENDA SECTION: New Business	
PREPARED BY: Amy Hess, Associate Planner	APPROVED BY: Allan Giffen, CD Interim Director	
ATTACHMENTS: 1. Memo to City Council dated October 14, 2020 2. Adopting Ordinance 3. PC Recommendation dated October 13, 2020 4. PC Minutes dated September 22, 2020 and October 13, 2020 5. Marysville School District CFP 6. Lake Stevens School District CFP 7. Lakewood School District CFP		
	MAYOR	CAO
BUDGET CODE:	AMOUNT:	

DESCRIPTION:

Pursuant to Section MMC 22D.040.030(1), *Capital facilities plan required*, any district serving the City of Marysville shall be eligible to receive school impact fees upon adoption of a Capital Facilities Plan (CFP) as a sub-element of the Capital Facilities Element of the Marysville Comprehensive Plan. School District CFPs are reviewed and adopted on a biennial basis.

The Planning Commission (PC) held a public workshop on September 22, 2020 and a duly advertised public hearing on October 13, 2020 to review the Marysville, Lake Stevens and Lakewood School District’s 2020 – 2025 CFPs, and received testimony from staff and each school district’s representative. There was no public testimony provided at the public hearing.

Following the public hearing, the PC made a motion to recommend the Marysville, Lake Stevens and Lakewood School District 2020 – 2025 CFPs to Marysville City Council for adoption by ordinance.

RECOMMENDED ACTION: Affirm the PC’s Recommendation and adopt the Marysville, Lake Stevens and Lakewood 2020 – 2025 CFPs as a sub-element of the Capital Facilities Element of the Marysville Comprehensive Plan.
COUNCIL ACTION:



MARYSVILLE
COMMUNITY
DEVELOPMENT

October 14, 2020

TO: City Council
FROM: Amy Hess, Associate Planner
RE: 2020-2025 School District Capital Facilities Plans for the Marysville, Lake Stevens, and Lakewood School Districts PA20-040
CC: Allan Giffen, Interim Community Development Director
Chris Holland, Planning Manager
Mike Sullivan, Marysville School District
Robb Stanton, Lake Stevens School District
Michael Mack, Lakewood School District

Pursuant to MMC 22D.040.030(1), any district serving the City of Marysville shall be eligible to receive school impact fees upon adoption by Marysville City Council of a capital facilities plan (CFP) for the district as a sub-element of the Capital Facilities Element of the Marysville Comprehensive Plan. Districts' CFPs are reviewed and adopted on a biennial basis.

Upon receipt of a district's CFP, the Community Development Department must determine:

1. That the analysis contained within the CFP is consistent with current data developed pursuant to the requirements of the Growth Management Act (GMA).
2. That any school impact fee proposed in the district's CFP has been calculated using the formula contained in MMC 22D.040.050 Table 1.
3. That the CFP has been adopted by the District's board of directors.

Based on a review of the districts' CFPs, it appears each plan has been prepared pursuant to the requirements of the GMA (RCW 36.70A), the impact fees have been calculated using the formula contained in MMC 22D.040.050 Table 1, and the CFPs have been adopted by each district's board of directors.

The following is a breakdown of current and proposed impact fees, as outlined in the district's CFP, applying the 50% discount pursuant to MMC 22D.040.050(1):

(360) 363-8100

Community
Development
80 Columbia Avenue
Marysville, WA 98270

Marysville School District	2018 -2023 (current)	2020 - 2025 (proposed)	Difference
Single-family	\$0.00	\$0.00	\$0.00
Multi-family (studio or one bedroom unit)	\$0.00	\$0.00	\$0.00
Multi-family (two or more bedroom unit)	\$0.00	\$0.00	\$0.00
Lake Stevens School District	2018 - 2023 (current)	2020 - 2025 (proposed)	Difference
Single-family	\$7,235.00	\$9,788.00	+\$2,553.00
Duplex/Townhouse	\$3,512.00	\$7,672.00	+\$4,160.00
Multi-family (studio or one bedroom unit)	\$0.00	\$0.00	\$0.00
Multi-family (two or more bedroom unit)	\$3,512.00	\$7,672.00	+\$4,160.00
Lakewood School District	2018 - 2023 (current)	2020 - 2025 (proposed)	Difference
Single-family	\$847.00	\$3,566.00	+\$2,719.00
Multi-family (studio or one bedroom unit)	\$0.00	\$445.00	+\$445.00
Multi-family (two or more bedroom unit)	\$2,022.00	\$1,641.00	-\$381.00

Staff respectfully requests City Council adopt the Marysville, Lake Stevens, and Lakewood Schools Districts' 2020 to 2025 CFPs.

CITY OF MARYSVILLE
Marysville, Washington

ORDINANCE NO. _____

AN ORDINANCE OF THE CITY OF MARYSVILLE, WASHINGTON RELATING TO THE CITY'S COMPREHENSIVE PLAN; AMENDING THE COMPREHENSIVE PLAN BY THE ADOPTION OF THE MARYSVILLE, LAKE STEVENS AND LAKEWOOD SCHOOL DISTRICTS' 2020 – 2025 CAPITAL FACILITIES PLANS AS A SUBELEMENT OF THE CITY'S COMPREHENSIVE PLAN AND ESTABLISHING THE ADOPTION OF SAID PLAN AND THE COLLECTION AND IMPOSITION OF SCHOOL IMPACT FEES, PURSUANT TO THE CITY'S ANNUAL COMPREHENSIVE PLAN AMENDMENT AND UPDATE PROCESS, AND REPEALING ORDINANCE NO. 3111.

WHEREAS, the State of Washington enacted the Growth Management Act ("GMA") in 1990 amending RCW Chapter 82.02 to authorize the collection of school impact fees on new development under specified conditions, including the adoption by the City of a GMA Comprehensive Plan as defined in RCW Chapter 36.70A; and

WHEREAS, the Marysville City Council adopted a GMA Comprehensive Plan on September 15, 2015 that included a policy commitment to consider the adoption of a GMA-based school impact fee program (Policy SC-6); and

WHEREAS, on December 10, 2018 the Marysville City Council approved Ordinance No. 3111, adopting an update to the Comprehensive Plan that adopted the Marysville, Lake Stevens and Lakewood School Districts' 2018 – 2023 Capital Facilities Plans as a subelement to the City Comprehensive Plan; and

WHEREAS, City staff has reviewed the respective 2020 – 2025 Capital Facility Plans developed by the Marysville, Lake Stevens, and Lakewood School Districts and adopted by their Board of Directors in accordance with the requirements of RCW Chapter 36.70A and RCW 82.02.050, et seq. and has determined that the plans meet the requirements of said statutes and Marysville Municipal Code (MMC) Chapter 22D.040 *School Impact Fees and Mitigation*; and

WHEREAS, the City of Marysville has adopted MMC Chapter 22D.040 relating to school impact fees and mitigation which is designed to meet the conditions for impact fee programs in RCW 82.02.050, et seq.; and

WHEREAS, the Marysville, Lake Stevens and Lakewood School Districts have prepared an environmental checklist and issued a SEPA Threshold Determination of Non-significance relating to their respective capital facilities plans; and

WHEREAS, the City has submitted the proposed Comprehensive Plan amendment to the State of Washington Department of Commerce for 60-day review in accordance with RCW 36.70A.106; and

WHEREAS, the Marysville Planning Commission, after review of the proposed Comprehensive Plan amendment, held a public workshop on September 22, 2020, and held a public hearing on October 13, 2020, and received testimony from each Districts' representative, staff and other interested parties following public notice; and

WHEREAS, the Planning Commission prepared and provided its written recommendation that said proposed amendment be approved by the Marysville City Council; and

WHEREAS, on _____, 2020 the Marysville City Council reviewed the Planning Commission's recommendation relating to the proposed Comprehensive Plan amendment; and

WHEREAS, the Marysville City Council has considered the School Districts' 2020 – 2025 Capital Facilities Plans in the context of the adopted Comprehensive Plan.

NOW, THEREFORE, THE CITY COUNCIL OF THE CITY OF MARYSVILLE, WASHINGTON DO ORDAIN AS FOLLOWS:

Section 1: Adoption. The Marysville School District Capital Facilities Plan 2020 – 2025, the Lake Stevens School District Capital Facilities Plan 2020 – 2025, and the Lakewood School District Capital Facilities Plan 2020 – 2025 (collectively referred to as "Plans") are hereby incorporated by this reference and are hereby adopted as a subelement to the capital facilities element of the City of Marysville Comprehensive Plan. The Plans hereby adopted replace the School District Capital Facility Plans previously adopted by Marysville City Council in Ordinances No. 3111.

Section 2: Ordinance No. 3111 is hereby repealed for the reason that it is replaced by this Ordinance.

Section 3: Schedule of fees. The Community Development Department is hereby directed to utilize the Plans adopted by this Ordinance to develop a schedule of school impact fees, calculated and adjusted by the provisions of MMC 22D.040.050 *School impact fee*.

Section 4: Severability. If any section, subsection, sentence, clause, phrase or word of this ordinance should be held to be invalid or unconstitutional by a court of competent jurisdiction, such invalidity or unconstitutionality thereof shall not affect the validity or constitutionality of any other section, subsection, sentence, clause, phrase or word of this ordinance.

Section 5. Correction. Upon approval by the City Attorney, the City Clerk or the code reviser are authorized to make necessary corrections to this Ordinance, including scrivener's errors or clerical mistakes; references to other local, state, or federal laws, rules, or regulations; or numbering or referencing of ordinances or their sections and subsections.

Section 6. Effective Date. This ordinance shall become effective five days after the date of its publication by summary.

PASSED by the City Council and APPROVED by the Mayor this _____ day of _____, 2020.

CITY OF MARYSVILLE

By: _____
JON NEHRING, MAYOR

Attest:

By: _____
TINA BROCK, DEPUTY CITY CLERK

Approved as to form:

By: _____
JON WALKER, CITY ATTORNEY

Date of Publication: _____

Effective Date: _____
(5 days after publication)

PC Recommendation – 2020-2025 School District Capital Facilities Plans Update

The Planning Commission (PC) of the City of Marysville, having held a public hearing on October 13, 2020 in review of a NON-PROJECT action amendment of the Marysville Comprehensive Plan, proposing adoption of the 2020-2025 School District Capital Facilities Plans Update as a subelement of the Marysville Comprehensive Plan, and having considered the exhibits and testimony presented, PC does hereby enter the following findings, conclusions and recommendation for consideration by the Marysville City Council:

FINDINGS:

1. The proposal was submitted to the State of Washington Department of Commerce for 60-day review on September 8, 2020, in accordance with RCW 36.70A.106.
2. The PC held a public work session to both introduce and review the NON-PROJECT action amendments proposing adoption of the NON-PROJECT action 2020-2025 School District Capital Facilities Plans Update as described above, on September 22, 2020.
3. The PC held a duly-advertised public hearing on October 13, 2020 and received testimony from city staff and the public.
4. At the public hearing, the PC reviewed and considered the 2020-2025 School District Capital Facilities Plans Update.

CONCLUSION:

At the public hearing, held on October 13, 2020, the PC recommended APPROVING the 2020-2025 School District Capital Facilities Plans Update.

RECOMMENDATION:

Forwarded to City Council as a Recommendation of APPROVAL of the NON-PROJECT action known as 2020-2025 School District Capital Facilities Plans Update, as a subelement of the 2015 Comprehensive Plan, this *October 13, 2020*.

By: 

Stephen Leifer, Planning Commission Chair

**Planning
Commission**



**1049 State Avenue
Marysville, WA 98270**

Meeting Minutes

September 22, 2020

ROLL CALL

Planning Commission: Chair Steve Leifer, Commissioner Roger Hoen, Commissioner Jerry Andes, Commissioner Brandon Whitaker, Commissioner Kristen Michal, Commissioner Tom Thetford, Commissioner Kevin Johnson

Staff: Planning Manager Chris Holland, Senior Planner Angela Gemmer, Janis Lamoureux, Associate Planner Amy Hess, Parks Director Tara Mizell, Assistant Director Dave Hall, Recreation Supervisor Joanna Martin

APPROVAL OF MINUTES (September 9, 2020)

Motion to approve the minutes from September 9, 2020 moved by Commissioner Brandon Whitaker seconded by Commissioner Jerry Andes.

AYES: ALL

AUDIENCE PARTICIPATION (for topics not on the agenda)

Commissioner Leifer solicited audience participation. There was none.

NEW BUSINESS

School District Capital Facilities Plan 2020-2025

- **Marysville School District No. 25**
- **Lake Stevens School District No. 4**
- **Lakewood School District No. 306**

Associate Planner Amy Hess introduced this topic. She summarized that the Marysville School District fees are currently zero, and no changes are being proposed. Lake Stevens is proposing an increase across all housing types with the exception of studio and one-bedroom multifamily units which are currently at zero and proposed to not change. Lakewood School District is proposing an increase for single family; studio and

one-bedroom multifamily units; and a small decrease for multifamily units with two or more bedrooms. Representatives from each district presented details of their plans.

Lake Stevens School District, Robb Stanton – Discussion:

Commissioner Hoen asked if Lake Stevens' recent bond issue passed. Mr. Stanton replied that the last one they ran was in 2016, and it was successful.

Commissioner Whitaker asked where Lake Stevens is seeing the most growth for the school district. Mr. Stanton replied that the northwest (Whiskey Ridge) and southwest (Cavalero Hills) corners are both very hot areas.

Marysville School District, Denise Stiffarm - Discussion:

Commissioner Whitaker asked how maintenance costs are being taken care of if there are no impact fees proposed. Ms. Stiffarm explained that impact fees cannot be used for maintenance. Those costs tend to be funded by operations and maintenance levies and general fund monies that are unrelated to growth funds.

Commissioner Andes asked for more detail about the capacity needs for elementary schools. Ms. Stiffarm explained that the levy to address capacity needs did not pass. Right now the capacity need is spread across the elementary schools.

Commissioner Michal asked for clarification about how impact fees can be used and about the need for capacity in the schools. Ms. Stiffarm explained that there is no enrollment growth in Marysville which makes them ineligible to seek school impact fees. To be eligible for impact fees a school district must demonstrate that it has all three of the following: enrollment growth, capacity needs, and a planned project.

Commissioner Hoen asked how there can be no enrollment growth with Marysville's notable increase in population. Ms. Stiffarm commented that the school district expects to see increase in enrollment, but a lot of the growth is actually in the neighboring school districts.

Chair Leifer asked how far in advance school districts can plan for increased impact fees when they see an increase in enrollment is forecast. Ms. Stiffarm replied that it is tied to the six-year planning window. They can use forecasts as a basis to start planning for the construction and the placement of that new growth; however, all three factors of increased enrollment, capacity needs, and planned projects need to be present in the six-year window in order to legally justify the impact fees.

Lakewood School District, Dale Leach - Discussion:

Chair Leifer asked how the State looks at school funding when everyone is doing school online right now. Mr. Leach explained that the State is requiring school districts to make contact with students in order to count. For the time being, that contact can be online.

Motion to schedule a public hearing on October 13 for the School District Capital Facilities Plans 2020-2025 for: Marysville School District No. 25, Lake Stevens School District No. 4, and Lakewood School District No. 306 moved by Commissioner Roger Hoen seconded by Commissioner Kristen Michal.

AYES: ALL

Parks, Recreation and Open Space Comprehensive Plan 2020-2025

Director Mizell, Assistant Director Dave Hall, and Recreation Supervisor Joanna Martin made a presentation of the Parks, Recreation, and Open Space Comprehensive Plan 2020-2025. They reviewed projects, demographics, projections, annual budget, and public surveys.

Discussion:

Commissioner Whitaker noted that compared to other like-sized cities, Marysville is pretty low on the list for funding. He asked if there has been discussion in the city about bumping up the percentage of funding which is currently 5.9%. Asst. Director Hall explained it has historically been in that range in Marysville. The graphic was provided for informational purposes only.

Commissioner Michael asked about facility rentals availability. Asst. Director Hall explained that normally the facilities are booked a lot, and they expect there will be an increased need for space in the future.

Chair Leifer asked about plans for an aquatic center which had been discussed in the past. Asst. Director Hall explained there are no plans for this currently. Chair Leifer asked if the allocation for \$20 million for Ebey Waterfront Park included potential clean-up of the site. Asst. Director Hall affirmed that the number is high due to the contamination and need for cleanup of the site. Chair Leifer asked for a breakdown of the number. Planning Manager Holland indicated he would provide that information.

Commissioner Whitaker asked about the preferred timeline for the Capital Facilities Plan projects. Director Mizell explained that the City is working on the next section of the trail, but they need to acquire the property first. Looking ahead, they will be able to apply for state RCO grants.

Commissioner Michal referred to the parks budget and the fact that people come from Lake Stevens and Arlington for Parks and Recreation opportunities. She asked about if the City is tracking this and if there is a way to maximize that opportunity. Director Mizell discussed challenges with this situation. Planning Manager Holland explained that recently the City entered into an agreement with Lake Stevens relating to trail and park amenities which recognizes the need to work together to maximize park facilities between jurisdictions.

Planning Manager Holland explained that this will also be on the October 13 agenda for a public hearing. He reported that Community Development Director Thomas's last day with the City will be this Friday.

ADJOURNMENT

Motion to adjourn moved by Commissioner Brandon Whitaker seconded by Commissioner Tom Thetford.

AYES: ALL

_____*Amy Hess*, Associate Planner_____

Laurie Hugdahl, Recording Secretary

NEXT MEETING – Tuesday, October 13, 2020

**Planning
Commission**



**1049 State Avenue
Marysville, WA 98270**

Meeting Minutes

October 13, 2020

CALL TO ORDER / ROLL CALL

Chair Leifer called the meeting to order at 5 p.m. Planning Manager Chris Holland called the roll.

Present:

Commission: Chair Leifer, Commissioner Kristen Michal, Commissioner Brandon Whitaker, Commissioner Tom Thetford, Commissioner Roger Hoen¹, Commissioner Kevin Johnson, Commissioner Jerry Andes²

Staff: Planning Manager Chris Holland, Program Specialist Janis Lamoureux, Interim Community Development Director Allen Giffen, Associate Planner Amy Hess, Parks & Rec. Director Tara Mizell, Parks & Rec. Asst. Director Dave Hall, Community Center Supervisor Joanna Martin, Senior Planner Angela Gemmer

APPROVAL OF MINUTES (September 22, 2020)

Motion to approve the minutes of the September 22, 2020 Planning Commission Meeting with the correction that Commissioner Johnson was in attendance moved by Commissioner Thetford seconded by Commissioner Whitaker.

VOTE: Motion carried 5 - 0

ABSENT: Commissioner Andes

ABSTAIN: Commissioner Hoen

AUDIENCE PARTICIPATION (for topics not on the agenda)

Allen Giffen, the new Interim Community Development Director, introduced himself. Commissioners also introduced themselves to Interim Director Griffen.

¹ Commissioner Hoen had technical difficulties and was not able to vote.

² Commissioner Andes arrived partway through the meeting.

PUBLIC HEARING

a. School District Capital Facilities Plan 2020 – 2025

- Marysville School District No. 25
- Lake Stevens School District No. 4
- Lakewood School District No. 306

Associate Planner Hess commented that staff had no additional information and that school district representatives were in attendance for questions if needed.

Commissioner Questions:

Commissioner Andes asked why the Lakewood multifamily fees for studios and one-bedrooms was increased when it has always been assumed that there wouldn't be children in those units. Denise Stiffarm from Pacifica Law Group, spoke as the representative of Lakewood School District. She explained that Lakewood School District works with an outside demographer for the purposes of preparing their student generation rate. For the first year they were able to capture students in their district residing in those small multifamily studios and one-bedroom units.

The public hearing was opened at 5:10 p.m., and public comments were solicited. Seeing none, the hearing was closed at 5:11 p.m.

Commissioner Comments and Deliberation: None

Motion to recommend the City Council approve the School District Capital Facilities Plan 2020 – 2025 for Marysville School District No. 25, Lake Stevens School District No. 4, and Lakewood School District No. 306 moved by Commissioner Whitaker seconded by Commissioner Thetford.

VOTE: Motion carried 6 - 0

ABSTAIN: Commissioner Hoen

b. Parks, Recreation and Open Space Comprehensive Plan 2020 - 2025

Commissioner Questions:

Chair Leifer asked about the breakdown of the \$20M for Ebey Waterfront Park. Planning Manager Holland offered to resend that.

The public hearing was opened at 5:15 p.m., and public comments were solicited. Seeing none, the hearing was closed at 5:15 p.m.

Commissioner Comments and Deliberation: None

Motion to forward the Parks, Recreation and Open Space Comprehensive Plan 2020 - 2025 to the City Council with a recommendation of approval moved by Commissioner Andes seconded by Commissioner Michal.

VOTE: Motion carried 6 - 0
ABSTAIN: Commissioner Hoen

OLD BUSINESS – Mixed Use (MU) zone discussion

Senior Planner Gemmer reviewed this item relating to Mixed Use (MU) zone development issues. She reviewed three possible options going forward:

- Option 1: Require vertical mixed use in the MU zone. Vertical mixed use would require a combination of multi-family and commercial in the same building.
- Option 2: Require a commercial component to projects which propose a single building. If a project proposes multiple buildings, the buildings along the street frontages would either need to be vertical mixed use or commercial. Multi-family residential would be allowed interior to the site (behind the commercial or mixed use buildings).
- Option 3: No change. The Mixed Use zone would continue to allow for: exclusive multi-family, exclusive commercial, or a combination of multi-family and commercial, whether vertical or horizontal.

She made a PowerPoint presentation of visual examples of how other jurisdictions have addressed mixed use development and summarized codes from other cities.

Chair Leifer wondered about jurisdictions up north closer to Marysville. Interim Community Development Director Giffen discussed his previous experience working as Planning Director with the City of Everett, especially with regard to trying to encourage mixed use development. Challenges to developers revolve around getting and keeping ground floor retail spaces active. The multifamily property tax exemption has helped to mitigate the situation, but there are still challenges.

The public hearing was opened at 5:44 p.m.

Public Testimony:

Joel Hylback expressed concerns about what is really possible in the current market environment. He urged the City to be cautious in this process and to make a code with lots of input.

Seeing no further public comments, the public testimony portion of the public hearing was closed at 5:47 pm.

Chair Leifer asked if there has been notification to property owners of Mixed Use property with regard to the possibility of changes to the zoning requirements. Planning Manager Holland replied that the City is still in very early stages of this, and property owners have not been notified yet. If and when there are some proposed code amendments, property owners would be notified. Senior Planner Gemmer summarized

that feedback they have heard from the development community is that generally there is more support for horizontal mixed use at this time.

Commissioner Comments and Deliberation:

Commissioner Whitaker asked for more information about the processes that led the various communities to the codes that they ended up with. Senior Planner Gemmer offered to reach out to jurisdictions to ask about this.

Commissioner Andes recommended tabling this for another year. He noted that businesses are going out of business and the need for office space is down because everyone is working from home. He doesn't think requiring retail would be in the best interest of developers at this time. Planning Manager Holland summarized the Council's discussion last night surrounding code amendments for the Community Business zone in Whiskey Ridge subarea. Council approved the cleanup code amendments, but was not interested in putting funds toward further environmental review of the area at this time due to the current climate and uncertainties.

Commissioner Michal asked if there is a way to track commercial space availability in the City in order to see what the trends and needs are. Senior Planner Gemmer commented that they used to do inventories of commercial vacancies, but this hasn't been done for a while. There might be some analysis occurring in conjunction with the Downtown Master Plan in the downtown area that could be instructive. Planning Manager Holland indicated they could look into this and talk with the Chamber to try to find more information about this. Commissioner Andes commented that he has observed there is a lot of empty space right now.

Commissioner Johnson asked what the Buildable Land Analysis shows is available for residential development outside of the Mixed Use zone. Planning Manager Holland replied that the staff is at the beginning stages of the Buildable Land Analysis process.

Chair Leifer reiterated his opinion that incentives are the way to go to encourage mixed use zones. He commented that this is what was done in Everett, and they continue to struggle with their commercial and mixed use projects. He echoed Commissioner Andes' recommendation to postpone this until they have a better idea of what is going to happen.

Commissioner Johnson expressed concern about postponing this, noting that they need to be thinking long-term anyway and not just looking at what could happen in the next year or so. He spoke to the importance of looking at what the community deserves and planning for that even if it takes longer.

Planning Manager Holland reiterated that reason this is coming to the Planning Commission is because the City Council wanted it addressed. He indicated he would forward the Planning Commission's comments to the City Council. There was some discussion about the status of properties in the mixed use zones and other areas in

Marysville. Interim Community Development Director Giffen suggested that tabling this temporarily might be supported noting that the current pattern of allowing either/or is probably what the market is likely to support in the foreseeable future.

Chair Leifer spoke to the importance of getting feedback from property owners before formulating a recommendation to the City Council. Commissioner Johnson recommended also getting input from the community as a whole and not just property owners. Planning Manager Holland indicated staff would look into doing something like that.

ADJOURNMENT

The meeting was adjourned at 6:22 p.m.

Laurie Hugdahl, Recording Secretary

NEXT MEETING – Tuesday, October 27, 2020

MARYSVILLE SCHOOL DISTRICT NO. 25

CAPITAL FACILITIES PLAN

2020-2025



MARYSVILLE
SCHOOL DISTRICT

Engage. Inspire. Prepare.

Adopted: August 17, 2020

MARYSVILLE SCHOOL DISTRICT NO. 25

CAPITAL FACILITIES PLAN

2020-2025

BOARD OF DIRECTORS

Vanessa Edwards, President

Paul Galovin, Vice President

Pete Lundberg

Jake Murray

Chris Nation

Jason Thompson, Superintendent

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Appendix C.....	Student Generation Rates

For information regarding the Marysville School District 2020-2025 Capital Facilities Plan, contact the Finance and Operations Department, Marysville School District No. 25, 4220 80th Street N.E., Marysville, Washington 98270-3498. Telephone: (360) 965-0094.

SECTION ONE: INTRODUCTION

Purpose of the Capital Facilities Plan

The Washington State Growth Management Act (the “GMA”) outlines 13 broad goals including adequate provision of necessary public facilities and services. Schools are among these necessary facilities and services. School districts have adopted capital facilities plans to satisfy the requirements of RCW 36.70A.070 and to identify additional school facilities necessary to meet the educational needs of the growing student populations anticipated in their districts.

The Marysville School District (the “District”) has prepared this Capital Facilities Plan (the “CFP”) to provide Snohomish County (the “County”), the City of Marysville (the “City”), and the City of Everett (“Everett”) with 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, Snohomish County Ordinance Nos. 97-095 and 99-107, 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 schools, middle level schools, and high schools).
- 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 support data substantiating said fees.

In developing this CFP, the District followed the following guidelines set forth in Appendix F of Snohomish County's 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 Chapter 82.02 RCW. 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.

Overview of the Marysville School District

The District encompasses most of the City of Marysville, a small portion of the City of Everett, and portions of unincorporated Snohomish County. The District's boundaries also include the Tulalip Indian Reservation. The District encompasses a total of 72 square miles.

The District currently serves an approximate student population of 10,198 (October 1, 2019 enrollment) with ten elementary schools, four middle level school, and four high schools (including two comprehensive high schools). For the purposes of facility planning, this CFP considers grades K-5 as elementary school, grades 6-8 as middle level school, and grades 9-12 as high school. The District also operates the Early Learning Center, housing ECEAP (Early Childhood Education and Assistance Program) as well as special education preschool programs.

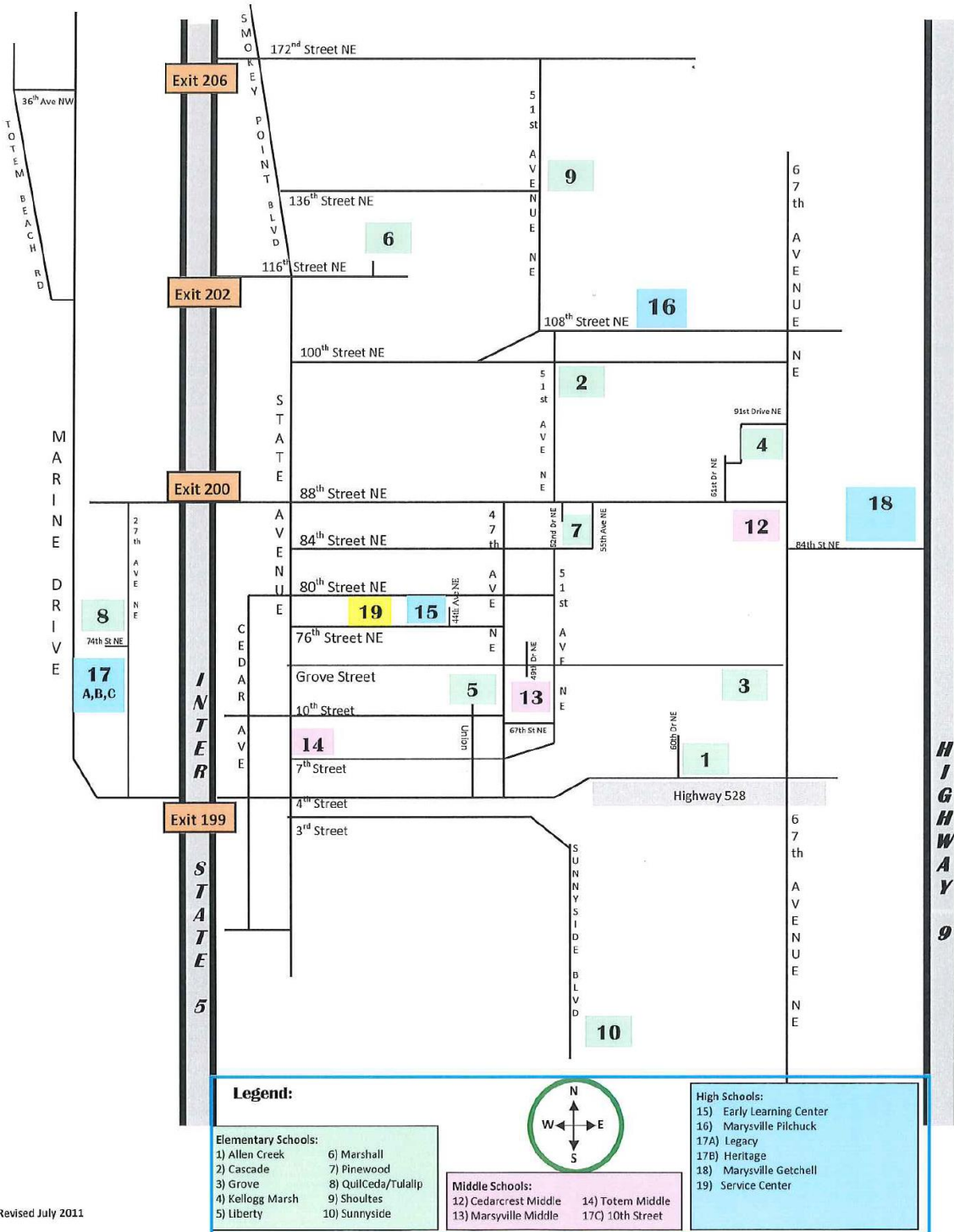
The District has experienced recent declines in enrollment, with a larger than expected decline in the 2019-2020 school year. The District intends to closely monitor enrollment particularly closely and will make adjustments as necessary should recent trends begin to reverse. While the District is not requesting school impact fees as a part of this CFP update, this scenario could change as student enrollment growth changes. Future updates to the CFP will include relevant information.

Facilities and Capacity Needs

The District encounters a variety of issues that affect the capital facilities planning process. Historically, affordable housing (as compared to Seattle and adjacent cities) in the District tended to draw young families, which puts demands on the school facilities. The 2005 amendments to the Snohomish County Comprehensive Plan expanded the Marysville urban growth boundary to include an additional 560.4 acres zoned for residential development. Also, a significant amount of acreage already within the Marysville UGA was rezoned to accommodate more density in housing developments. However, there is currently little housing growth in the pipeline for the Marysville School District boundaries. The District is watching this pipeline carefully so that it may make adjustments as necessary should new development planning start to shift toward more expected residential development within the District.

In February of 2006, the District's voters approved a school construction bond for approximately \$118 million. The bond helped to pay for the construction of Marysville Getchell High School and Grove Elementary School. The District also used the bond proceeds to acquire future school sites. In 2014, District voters approved a \$12 million technology (and a replacement levy was approved in 2018). The District presented a \$120 million capital levy measure to the voters in February 2020 to fund school safety and security improvements and to rebuild Cascade and Liberty Elementary Schools. The District failed to receive sufficient votes for approval of the capital levy proposal. The District's Board of Directors will evaluate the scope and timing of a future bond or capital levy proposal.

Welcome to the Marysville School District No. 25



Revised July 2011

SECTION 2 -- EDUCATIONAL PROGRAM STANDARDS

The District acknowledges and realizes that classroom population impacts the quality of instruction provided. 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 classrooms (portables).

In addition to student population, other factors such as collective bargaining agreements, government mandates, and community expectations also affect classroom space requirements. Traditional educational programs are often supplemented by programs such as special education, remediation, alcohol and drug education, computer labs, music, art, and other programs. These programs can have a significant impact on the available student capacity of school facilities.

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, and use of new technology, as well as other physical aspects of the school facilities. The State Legislature's requirements for full-day kindergarten and reduced K-3 class size impact school capacity and educational program standards. The District has implemented full-day kindergarten classes and K-3 class size reduction. 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 CFP.

Within the context of this topic, there are at least three methodologies that can be applied to capacity forecasting. Those include a maximum class size based on contractual obligations, a maximum class size target, and a minimum service level.

The District has internal targets, which predicate staffing decisions. These internal targets are the District's preferred capacity levels. In comparison, class size based on a maximum number of students is predicated on contractual language in the contract with the Marysville Education Association. This contract specifies a maximum number of students in a classroom above which the District must fund additional classroom assistance. Finally, the minimum service level represents the capacity level that the District will not exceed. This is determined by an average maximum number of students in a classroom by grade (for K-8 classes) or by a course of study (for the 9-12 grade level). For example, grade 8 may have an average class size (and minimum level of service) of 32 students. Some classrooms might have less than 32 students and some classrooms might have more than 32 students; however the average of grade 8 classrooms district-wide will not exceed 32 students. At the secondary school level, some classes will exceed 34 students (band, physical education, etc.). This minimum service level is defined for core classes and is an average of all core classes for the secondary level. Table 1 compares class size methodologies.

Table 1
Class Size Methodologies

<i>Grade Level</i>	<i>District Targets</i>	<i>Maximum (Per Contract)</i>	<i>Minimum Service Level</i>
Kindergarten	17	24	27
Grades 1 – 3	17	24	27
Grades 4 – 5	25	27	30
Grades 6 – 8	25	30	32
Grades 9 – 12	25	30	34

Educational Program Standards Based Upon Internal Targets

Elementary Schools:

- Average class size for Kindergarten should not exceed 17 students.
- Average class size for grades 1-3 should not exceed 17 students.
- Average class size for grades 4-5 should not exceed 25 students.
- Special education for students may be provided in regular classes when inclusion is possible and in self-contained classrooms when this is the most appropriate option available.

Middle and Junior High Schools:

- Average class size for grades 6-8 should not exceed 25 students.
- It is not possible to achieve 100% utilization of all regular teaching stations throughout the day. Therefore, classroom capacity is adjusted using a utilization factor of available teaching stations depending on the physical characteristics of the facility and program needs.
- Special education for students may be provided in regular classes when inclusion is possible and in self-contained classrooms when this is the most appropriate option available.
- Identified students will also be provided other programs in “resource rooms (i.e., computer labs, study rooms), and program specific classrooms (i.e., music, drama, art, home and family education).

High Schools:

- Average class size for grades 9-12 should not exceed 25 students.
- It is not possible to achieve 100% utilization of all regular teaching stations throughout the day. Therefore, classroom capacity is adjusted using a utilization factor of available teaching stations depending on the physical characteristics of the facility and program needs.

- Special education for students may be provided in regular classes when inclusion is possible and in self-contained classrooms when this is the most appropriate option available.
- Identified students will also be provided other programs in “resource rooms (i.e., computer labs, study rooms), and program specific classrooms (i.e., music, drama, art, home and family education).

For the school years of 2017-18 and 2018-19, the District’s compliance with the minimum educational service standards 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
	29	25.35	32	23.86	34	23.23

* The District determines the reported service level by adding the number of students 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
	29	25.02	32	25.42	34	21.04

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

SECTION THREE: CAPITAL FACILITIES INVENTORY

Under the GMA, public entities are required to inventory capital facilities used to serve existing development. The purpose of the facilities inventory is to establish a baseline for determining what facilities will be required 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 (portables), undeveloped land, and support facilities. School facility capacity was inventoried based on the space required to accommodate the District's adopted educational program standards. *See Section Two: Educational Program Standards.* A map showing locations of District facilities is provided on page 4.

Schools

See *Section One and Two* for a description of the District's schools and programs.

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 and internal targets. 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 Tables 2, 3, and 4. In addition to the school capacity inventory identified in these tables, the District operates the Early Learning Center (ECEAP program and special education preschool programs).

Relocatable Classrooms (Portables)

Relocatable classrooms (portables) are used as interim classroom space to house students until funding can be secured to construct permanent classrooms. The District currently uses 63 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 5.

Table 2
Elementary School Inventory

<i>Elementary School</i>	<i>Site Size (Acres)</i>	<i>Building Area (sq ft)</i>	<i>Teaching Stations*</i>	<i>Permanent Capacity**</i>
Allen Creek	11.0	47,594	21.0	412
Cascade	9.5	38,923	21.0	412
Grove	6.2	54,000	24.0	470
Kellogg Marsh	12.8	47,816	21.0	412
Liberty	9.1	40,459	20.0	392
Marshall	13.7	53,063	14.0	274
Pinewood	10.5	40,073	17.0	333
Quil Ceda	10.0	47,594	27.0	529
Shoultes	9.5	40,050	16.0	314
Sunnyside	10.4	39,121	22.0	431
TOTAL	102.7	448,693	203	3,979

* Teaching Station Definition: A space designated as a classroom. Other stations include spaces designated for special education and pull-out programs.

** Regular classrooms; includes reduced K-3 class size.

Table 3
Middle Level School Inventory

<i>Middle Level School</i>	<i>Site Size (Acres)</i>	<i>Building Area (sq ft)</i>	<i>Teaching Stations*</i>	<i>Permanent Capacity**</i>
Cedarcrest	27.0	83,128	29.0	725
Marysville Middle	21.0	99,617	32.0	800
Marysville Tulalip Campus*** (6-8)	***	15,000	7.0	175
Totem	15.2	124,822	30.0	750
TOTAL	63.2	322,567	98	2,450

* Teaching Station Definition: A space designated as a classroom. Other stations include spaces designated for special education and pull-out programs.

** Regular classrooms.

***The Marysville Tulalip Campus includes the following schools co-located on one campus: Legacy High School, Heritage High School, and the 10th Street School. Grades 6-12 are served at the Marysville Tulalip Campus. The above chart identifies information relevant to grades 6-8.

Table 4
High School Inventory

<i>High School</i>	<i>Site Size (Acres)</i>	<i>Building Area (sq ft)</i>	<i>Teaching Stations*</i>	<i>Permanent Capacity**</i>
Marysville Pilchuck	83.0	259,033	56.0	1,400
Marysville Getchell	38.0	193,000	61.0	1,525
Marysville Tulalip Campus*** (9-12)	39.4	70,000	19.0	475
TOTAL	160.4	522,033	136	3,400

* Teaching Station Definition: A space designated as a classroom. Other stations include spaces designated for special education and pull-out programs.

** Regular classrooms.

***The Marysville Tulalip Campus includes the following schools co-located on one campus: Legacy High School, Heritage High School, and the 10th Street School. Grades 6-12 are served at the Marysville Tulalip Campus. The above chart identifies information relevant to grades 9-12.

Table 5
Relocatable Classroom (Portable) Inventory*

<i>Elementary School</i>	<i>Relocatables**</i>	<i>Other Relocatables***</i>	<i>Interim Capacity</i>
Allen Creek	7	0	137
Cascade	3	2	59
Kellogg Marsh	5	2	98
Liberty	6	2	118
Marshall	3	3	59
Pinewood	3	4	59
Quil Ceda	4	4	78
Shoultes	5	3	98
Sunnyside	4	5	78
<i>SUBTOTAL</i>	40	25	784

<i>Middle Level School</i>	<i>Relocatables</i>	<i>Other Relocatables</i>	<i>Interim Capacity</i>
Cedarcrest	11	2	275
Marysville Middle	7	2	175
Marysville Tulalip Campus	1	0	25
Totem	0	0	0
<i>SUBTOTAL</i>	19	4	475

<i>High School</i>	<i>Relocatables</i>	<i>Other Relocatables</i>	<i>Interim Capacity</i>
Marysville-Getchell	0	0	0
Marysville-Pilchuck	1	0	25
Marysville Tulalip Campus	1	0	25
Mountain View	2	0	50
<i>SUBTOTAL</i>	4	0	100

<i>TOTAL</i>	63	29	1,359
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* Each portable is 600 square feet. The District's relocatable facilities identified above have adequate useful remaining life and are evaluated regularly.

**Used for regular classroom capacity.

***The relocatables referenced under "other relocatables" are used for special pull-out programs.

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 6.

***Table 6
Support Facility Inventory***

<i>Facility</i>	<i>Building Area (Square Feet)</i>	<i>Site Size (Acres)</i>
Service Center		11.35
Administration	33,028	
Grounds	3,431	
Maintenance	12,361	
Engineering	7,783	
Warehouse	16,641	

Land Inventory

The District owns a number of undeveloped sites. An inventory of these sites is provided in Table 7.

***Table 7
Undeveloped Site Inventory***

<i>Site</i>	<i>Site Size (Acres)</i>
4315 71 st Ave NE (under sale contract)	7.00
152nd Street Site	35.02
84 th Street NE Site – Parcel 1	20.67
84 th Street NE Site – Parcel 2	27.75

Development on some of these sites may be restricted due to significant wetlands, limited site sizes, high utility costs, and/or inappropriate locations. In addition to these sites, the District owns one site of less than two acres that is currently under contract for sale.

SECTION FOUR: STUDENT ENROLLMENT TRENDS AND PROJECTIONS

Generally, enrollment projections using historical calculations are most accurate for the initial years of the forecast period. Moving further into the future, more assumptions about economic conditions, land use, and demographic trends in the area affect the projection. Monitoring birth rates in the County and population growth for the area are essential yearly activities in the ongoing management of the CFP. 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 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 survival projection developed by a demographer in May 2019. The District also calculated an enrollment estimate based upon anticipated Snohomish County population from the County's adopted OFM forecast.

Based on the cohort survival methodology, a total of 9,776 students are expected to be enrolled in the District by 2025, a decrease from the October 2019 enrollment levels. The projected decline reflects the District's experience in recent years of declining enrollment growth at the middle school level and, recently, at the elementary school level. However the OSPI projections also predict a slight increase in enrollment at the high school level over the six year planning period. Notably, the cohort survival method does not anticipate changing development patterns, so it may not capture new development resulting from the rebound in the residential construction industry and as anticipated in the Snohomish County/OFM projections. See Appendix A.

The District obtained in May 2019 an enrollment forecast from a professional demographer, William L. (Les) Kendrick, Ph.D. The low range projection of the Kendrick analysis best reflects (among the low, medium, and high projections in that report) actual October 2019 enrollment in the District. Based on this low range projection, a total enrollment of 10,648, or 137 additional students, are expected by the 2025-26 school year. This projection is a 1.34% increase over 2019 enrollment. Growth is projected at the elementary school level, with declining enrollment at the middle and high school grade levels. The Kendrick analysis utilizes historic enrollment patterns, demographic and land use analysis based upon information from Snohomish County and the City of Marysville, census data, Snohomish County/OFM forecasts and trends, and Washington State Department of Health birth data. The Kendrick projections are included in Appendix A.

A population-based enrollment projection was estimated for the District using OFM population forecasts for Snohomish County. The County provided the District with the estimated total population in the District by year. Between 2014 and 2019, the District's student enrollment constituted approximately 14.48% of the total population in the District. Assuming that between 2020 and 2025, the District's enrollment will continue to constitute 14.48% of the District's total population and using OFM/County data, OFM/County methodology projects a total enrollment of 11,751 students in 2025.

The comparison of the projected enrollment under each methodology is contained in Table 8.

Table 8
Projected Student Enrollment (FTE)*
2020-2025

<i>Projection</i>	<i>2019*</i>	<i>2020</i>	<i>2021</i>	<i>2022</i>	<i>2023</i>	<i>2024</i>	<i>2025</i>	<i>Actual Change</i>	<i>Percent Change</i>
OFM/County	10,198	10,456	10,714	10,972	11,230	11,488	11,751	1,553	15.2%
OSPI Cohort	10,198	10,117	10,080	10,041	9,969	9,893	9,776	(422)	(4.14)%
District (Kendrick)	10,198	10,132	10,087	10,113	10,141	10,256	10,335	137	1.34%

*Actual October 2019 enrollment

Based upon the immediate dynamics of the District, as discussed above, the District has chosen to follow the Kendrick analysis during this planning period. This decision will be revisited in future updates to the CFP.

2035 Enrollment Projections

Student enrollment projections beyond 2025 and to the future are highly speculative. Assuming that the District’s enrollment will continue to constitute 14.48% of the District’s population through 2035, and assuming that the ratio of students in each grade level stays constant, the projected enrollment by grade span *based upon the County/OFM projections* is as follows:

Table 9
Projected FTE Student Enrollment – County/OFM
2035

<i>Grade Span</i>	<i>Projected FTE Enrollment</i>
Elementary (K-5)	6,313
Middle Level School (6-8)	3,157
High School (9-12)	3,683
TOTAL (K-12)	13,153

Again, these estimates are highly speculative given current information and the length of the planning period. The District will continue to monitor enrollment growth and make appropriate adjustments in future updates to the CFP.

SECTION FIVE: CAPITAL FACILITIES PROJECTIONS FOR FUTURE NEEDS

Projected available student capacity was derived by subtracting projected student enrollment from existing school capacity (excluding relocatable classrooms) for each of the six years in the forecast period (2020-2025). Capacity needs are expressed in terms of “unhoused students”

Table 10 identifies the District’s current permanent capacity needs (based upon information contained in Table 12):

Table 10
Unhoused Students – Based on October 2019 Enrollment/Capacity

<i>Grade Span</i>	<i>Unhoused Students/(Available Capacity)</i>
Elementary Level (K-5)	(866)
Middle Level (6-8)	(41)
High School Level (9-12)	538

Assuming no permanent capacity additions or adjustments, Table 11 identifies the additional permanent classroom capacity that will be needed in 2025:

Table 11
Unhoused Students – 2025

<i>Grade Span</i>	<i>Unhoused Students/(Available Capacity)</i>
Elementary Level (K-5)	(1,311)
Middle Level (6-8)	249
High School Level (9-12)	555

Interim capacity provided by relocatable classrooms is not included, though the District expects to continue to use relocatable classrooms to provide for a portion of the capacity needs. Relocatables may be moved from one grade level to another grade level as needed for capacity. (Information on relocatable classrooms by grade level and interim capacity can be found in Table 5.

The District has no currently planned construction projects during this six-year planning period. Future updates to this CFP will include any identified projects.

Table 12 - Projected Student Capacity

Elementary School -- Surplus/Deficiency

	2019*	2020	2021	2022	2023	2024	2025
Existing Permanent Capacity	3,979	3,979	3,979	3,979	3,979	3,979	3,979
Permanent Capacity Change	0	0	0	0	0	0	0
Total Permanent Capacity**	3,979	3,979	3,979	3,979	3,979	3,979	3,979
Enrollment	4,845	4,904	4,920	4,906	4,999	5,165	5,290
Permanent Capacity Surplus (Deficiency)**	(866)	(925)	(941)	(927)	(1,020)	(1,186)	(1,311)

*Actual October 2019 enrollment

**Does not include relocatable capacity.

Middle School Level -- Surplus/Deficiency

	2019*	2020	2021	2022	2023	2024	2025
Existing Permanent Capacity	2,450	2,450	2,450	2,450	2,450	2,450	2,450
Permanent Capacity Change	0	0	0	0	0	0	0
Total Permanent Capacity**	2,450	2,450	2,450	2,450	2,450	2,450	2,450
Enrollment	2,491	2,413	2,355	2,278	2,295	2,244	2,201
Permanent Capacity Surplus (Deficiency)**	(41)	37	95	172	155	206	249

*Actual October 2019 enrollment

**Does not include relocatable capacity.

High School Level -- Surplus/Deficiency

	2019*	2020	2021	2022	2023	2024	2025
Existing Permanent Capacity	3,400	3,400	3,400	3,400	3,400	3,400	3,400
Permanent Capacity Change	0	0	0	0	0	0	0
Total Permanent Capacity**	3,400	3,400	3,400	3,400	3,400	3,400	3,400
Enrollment	2,862	2,815	2,812	2,929	2,846	2,847	2,845
Permanent Capacity Surplus (Deficiency)**	538	585	588	471	554	553	555

*Actual October 2019 enrollment

**Does not include relocatable capacity.

SECTION SIX: FINANCING PLAN

Planned Improvements

At the present time, the District does not have specific plans to construct new permanent capacity during the six-year planning period. The District likely will purchase and site new portable facilities to address capacity needs. The District intends to monitor closely enrollment and capacity needs and will update the CFP in the future as appropriate.

The District is using funds from the February 2018 Technology and Capital Levy for technology projects and building maintenance (including roof replacements and heating system maintenance.)

Financing for Planned Improvements

Funding for planned improvements is typically secured from a number of sources including voter-approved bonds, State match funds, and impact fees.

General Obligation Bonds/Capital Levies: Bonds are typically used to fund construction of new schools and other capital improvement projects, and require a 60% voter approval. Capital levies require a 50% voter approval and can be used for certain capital improvement projects. The District presented a \$120 million capital levy in February 2020 to the voters to fund safety/security upgrades and to replace Cascade and Liberty elementary schools. The levy failed to reach the required threshold for approval. Future updates to the CFP will include information related to future bond planning and projects.

State School Construction Assistance Funds: 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 funds for certain projects at the 63.21% funding percentage level.

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. *See Section 7 School Impact Fees.*

The Six-Year Financing Plan shown on Table 13 demonstrates how the District intends to fund new construction and improvements to school facilities for the years 2020-2025. The financing components include bonds, State School Construction Assistance funds, and impact fees. 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. As previously stated, with the exception of portable purchases, the District currently does not plan to construct new permanent capacity projects within the six-year planning period.

Table 13 - Capital Facilities Financing Plan

Improvements Adding Permanent Capacity (Costs in Millions)**

Project	2020	2021	2022	2023	2024	2025	Total Cost	Bonds/ Local Funds	Projected State Funds	Impact Fees
Elementary										
Middle School										
High School										
Portables		\$0.118	\$0.118				\$0.360	X		

**Growth-related

Improvements Not Adding New Permanent Capacity (Costs in Millions)

Project	2020	2021	2022	2023	2024	2025	Total Cost	Bonds/ Levies	Projected State Funds	Impact Fees
Elementary										
Middle										
High School										
District-wide										
Technology/Misc. Capital Improvements	\$6.000	\$6.000					\$12.000	X		

SECTION SEVEN: 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.

School Impact Fees in Snohomish County, the City of Marysville, and the City of Everett

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, description of key variables and their computation, and definitions and sources of data for all inputs into the fee calculation.
- 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 one-bedroom; and multi-family/two or more-bedroom.

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.

The City of Marysville also adopted a school impact fee program consistent with the Growth Management Act in November 1998 (with subsequent amendments).

Methodology Used to Calculate School Impact Fees

Impact fees are calculated utilizing the formula in the Snohomish County Code and the Municipal Code for the City of Marysville. Where applicable, 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 (portables), all as related to growth needs. 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.

When an impact fee is calculated, the District's cost per dwelling unit is derived by multiplying the cost per student by the applicable student generation rate per dwelling unit. The student generation rate is the average number of students generated by each housing type -- in this case, single family dwellings and multi-family dwellings. Pursuant to the Snohomish County and the City of Marysville School Impact Fee Ordinances, multi-family dwellings are separated into one-bedroom and two-plus bedroom units. The District does not request school impact fees from the City of Everett as the portion of the District within City of Everett boundaries is largely undevelopable.

The District did not conduct a student generation study for this CFP since it is not requesting school impact fees. Future updates to this CFP, where impact fees are requested, will include an updated student generation rate study.

Proposed Marysville School District Impact Fee Schedule for Snohomish County and the City of Marysville

The District does not have capacity projects planned as a part of the 2020 CFP. See discussion in Section 6 above. As such, the District is not requesting the collection of impact fees as a part of this Capital Facilities Plan. The District expects that future project planning and stabilization of enrollment will lead to a renewed request for impact fees in future updates to the Capital Facilities Plan.

**Table 12
School Impact Fees
2020**

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

FACTORS FOR ESTIMATED IMPACT FEE CALCULATIONS

<p>Student Generation Factors – Single Family</p> <p>Elementary Middle Senior</p> <p style="text-align: right;">Total N/A</p>	<p>Average Site Cost/Acre N/A</p>
<p>Student Generation Factors – Multi Family (1 Bdrm)</p> <p>Elementary Middle Senior</p> <p style="text-align: right;">Total N/A</p>	<p>Temporary Facility Capacity Capacity Cost</p>
<p>Student Generation Factors – Multi Family (2+ Bdrm)</p> <p>Elementary Middle Senior</p> <p style="text-align: right;">Total N/A</p>	<p>State School Construction Assistance Current Funding Percentage 63.21%</p>
<p>Projected Student Capacity per Facility N/A</p>	<p>Construction Cost Allocation Current CCA 238.22</p>
<p>Required Site Acreage per Facility N/A</p>	<p>District Average Assessed Value Single Family Residence \$372,400</p>
<p>Facility Construction Cost N/A</p>	<p>District Average Assessed Value Multi Family (1 Bedroom) \$125,314</p> <p>District Average Assessed Value Multi Family (2+ Bedroom) \$178,051</p>
<p>Permanent Facility Square Footage</p> <p>Elementary 448,693 Middle 322,567 Senior 522,033</p> <p style="text-align: right;">Total 94.50% 1,293,293</p>	<p>SPI Square Footage per Student</p> <p>Elementary 90 Middle 108 High 130</p>
<p>Temporary Facility Square Footage</p> <p>Elementary 39,000 Middle 13,800 Senior 2,400</p> <p style="text-align: right;">Total 5.50% 55,200</p>	<p>District Property Tax Levy Rate (Bonds) Current/\$1,000 \$0.8347</p>
<p>Total Facility Square Footage</p> <p>Elementary 487,693 Middle 336,367 Senior 524,433</p> <p style="text-align: right;">Total 100% 1,348,493</p>	<p>General Obligation Bond Interest Rate Current Bond Buyer Index 2.44%</p>
	<p>Developer Provided Sites/Facilities</p> <p>Value 0 Dwelling Units 0</p>
	<p>Note: The total costs of the school construction projects and the total capacities are shown in the fee calculations. However, new development will only be charged for the system improvements needed to serve new growth.</p>

APPENDIX A

POPULATION AND ENROLLMENT DATA



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

Snohomish/Marysville(31025)

Grade	--- ACTUAL ENROLLMENTS ON OCTOBER 1st ---						AVERAGE % SURVIVAL	--- PROJECTED ENROLLMENTS ---					
	2014	2015	2016	2017	2018	2019		2020	2021	2022	2023	2024	2025
Kindergarten	812	848	836	808	788	810		795	789	783	777	770	764
Grade 1	957	771	859	877	810	781	100.09%	811	796	790	784	778	771
Grade 2	891	952	781	867	891	797	100.33%	784	814	799	793	787	781
Grade 3	848	874	942	765	863	853	98.04%	781	769	798	783	777	772
Grade 4	827	838	897	940	782	834	100.01%	853	781	769	798	783	777
Grade 5	817	843	810	889	945	770	99.33%	828	847	776	764	793	778
K-5 Sub-Total	5,152	5,126	5,125	5,146	5,079	4,845		4,852	4,796	4,715	4,699	4,688	4,643
Grade 6	802	775	802	779	848	897	95.29%	734	789	807	739	728	756
Grade 7	827	793	766	800	779	838	99.25%	890	728	783	801	733	723
Grade 8	863	812	788	759	791	756	98.50%	825	877	717	771	789	722
6-8 Sub-Total	2,492	2,380	2,356	2,338	2,418	2,491		2,449	2,394	2,307	2,311	2,250	2,201
Grade 9	856	891	840	815	744	777	101.27%	766	835	888	726	781	799
Grade 10	911	851	890	824	814	754	99.71%	775	764	833	885	724	779
Grade 11	807	818	747	798	705	657	86.69%	654	672	662	722	767	628
Grade 12	843	776	739	722	752	674	94.59%	621	619	636	626	683	726
9-12 Sub-Total	3,417	3,336	3,216	3,159	3,015	2,862		2,816	2,890	3,019	2,959	2,955	2,932
DISTRICT K-12 TOTAL	11,061	10,842	10,697	10,643	10,512	10,198		10,117	10,080	10,041	9,969	9,893	9,776

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

Low Range Projection

Marysville Enrollment History

	<u>2004</u>	<u>2005</u>	<u>2006</u>	<u>2007</u>	<u>2008</u>	<u>2009</u>	<u>2010</u>	<u>2011</u>	<u>2012</u>	<u>2013</u>
County Births	8675	8924	9070	9570	9795	9237	9001	8925	9226	9406
% of Cohort	10.2%	9.5%	9.4%	9.4%	9.5%	8.8%	9.4%	9.4%	8.8%	8.4%
City of Marysville	648	716	808	846	877	849	847	860	864	893
K % of City Cohort	136.3%	118.9%	105.8%	106.1%	106.4%	95.3%	100.1%	97.3%	93.5%	88.4%

	<u>Oct-09</u>	<u>Oct-10</u>	<u>Oct-11</u>	<u>Oct-12</u>	<u>Oct-13</u>	<u>Oct-14</u>	<u>Oct-15</u>	<u>Oct-16</u>	<u>Oct-17</u>	<u>Oct-18</u>
K	883	851	855	898	933	809	848	837	808	789
1	859	890	861	830	903	957	771	859	878	810
2	871	843	879	860	848	891	952	781	867	891
3	904	846	830	857	844	848	874	942	764	863
4	886	899	858	834	824	827	838	897	939	782
5	917	874	885	844	834	816	843	810	889	945
6	879	891	853	845	830	802	775	802	779	848
7	851	859	903	874	855	826	793	767	799	779
8	866	831	852	895	843	866	812	791	759	791
9	881	852	838	876	919	864	895	842	815	744
10	874	892	900	854	905	926	860	892	825	815
11	849	862	842	821	793	828	828	753	802	706
12	<u>980</u>	<u>987</u>	<u>943</u>	<u>900</u>	<u>877</u>	<u>874</u>	<u>796</u>	<u>746</u>	<u>723</u>	<u>756</u>
Total	11500	11377	11299	11188	11208	11134	10885	10719	10647	10519
Change	-165	-123	-78	-111	20	-74	-249	-166	-72	-128
% Change	-1.4%	-1.1%	-0.7%	-1.0%	0.2%	-0.7%	-2.2%	-1.5%	-0.7%	-1.2%
K-5	5320	5203	5168	5123	5186	5148	5126	5126	5145	5080
6-8	2596	2581	2608	2614	2528	2494	2380	2360	2337	2418
9-12	3584	3593	3523	3451	3494	3492	3379	3233	3165	3021

Low Range Projection

Projected Births

	<u>2014</u>	<u>2015</u>	<u>2016</u>	<u>2017</u>	<u>2018</u>	<u>2019</u>	<u>2020</u>	<u>2021</u>	<u>2022</u>	<u>2023</u>
County Births	9524	9766	10045	9877	10034	10124	10062	10088	10114	10142
K % of Cohort	8.6%	8.5%	8.7%	8.7%	8.7%	9.1%	9.1%	9.1%	9.1%	9.1%
City of Marysville	885	901	956	962	961	963	965	969	968	971
K % of City Cohort	92.2%	92.0%	91.9%	89.8%	91.3%	96.0%	95.3%	95.1%	95.4%	95.5%

	<u>Oct-19</u>	<u>Oct-20</u>	<u>Oct-21</u>	<u>Oct-22</u>	<u>Oct-23</u>	<u>Oct-24</u>	<u>Oct-25</u>	<u>Oct-26</u>	<u>Oct-27</u>	<u>Oct-28</u>
K	816	829	879	864	878	925	919	922	924	926
1	796	813	826	876	862	880	928	922	924	927
2	803	784	813	828	882	870	889	937	931	933
3	867	782	766	796	814	869	858	876	923	917
4	847	867	785	770	803	824	879	868	886	934
5	767	830	852	773	761	796	817	872	861	879
6	894	722	784	806	734	725	759	779	831	821
7	833	878	712	774	799	730	721	755	774	826
8	759	813	860	698	762	789	721	712	746	765
9	792	760	814	861	698	765	792	723	715	748
10	728	775	746	800	849	691	757	784	716	707
11	701	626	668	645	695	740	602	659	683	623
12	<u>658</u>	<u>654</u>	<u>584</u>	<u>623</u>	<u>604</u>	<u>652</u>	<u>694</u>	<u>565</u>	<u>618</u>	<u>641</u>
Total	10251	10132	10087	10113	10141	10256	10335	10373	10532	10648
Change	-268	-119	-45	26	27	116	79	37	159	116
% Change	-2.6%	-1.2%	-0.4%	0.3%	0.3%	1.1%	0.8%	0.4%	1.5%	1.1%
K-5	4886	4904	4920	4906	4999	5165	5290	5396	5449	5517
6-8	2486	2413	2355	2278	2295	2244	2201	2245	2351	2411
9-12	2879	2815	2812	2929	2846	2847	2845	2731	2732	2719

APPENDIX B

SCHOOL IMPACT FEE CALCULATIONS

This section is not updated for the 2020-2025 Capital Facilities Plan since no Impact Fee is requested. Future updates to this CFP may include an Impact Fee.

APPENDIX C

STUDENT GENERATION RATES (SGR)

This section is not updated for the 2020-2025 Capital Facilities Plan since no Impact Fee is requested. Future updates to this CFP may include an Impact Fee with updated Student Generation Rates.

2020 – 2025 CAPITAL FACILITIES PLAN LAKE STEVENS SCHOOL DISTRICT NO. 4

prepared for:

Snohomish County

And

City of Lake Stevens
City of Marysville

August 2020

CAPITAL FACILITIES PLAN

LAKE STEVENS SCHOOL DISTRICT NO. 4

BOARD OF DIRECTORS

Mari Taylor, President
John Boerger, Vice President
David Iseminger
Paul Lund
Kevin Plemel

SUPERINTENDENT

Amy Beth Cook, Ed.D.

This plan is not a static document. It will change as demographics, information and District plans change. It is a “snapshot” of one moment in time.

For information on the Lake Stevens School District Capital Facilities Plan contact Robb Stanton at the District (425) 335-1500

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APPENDICES

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SECTION 1: INTRODUCTION

Purpose of the Capital Facilities Plan

The Washington Growth Management Act (GMA) outlines thirteen broad goals including adequate provision of necessary public facilities and services. Schools are among these necessary facilities and services. The public school districts serving Snohomish County residents have developed capital facilities plans to satisfy the requirements of RCW 36.70A.070 and to identify additional school facilities necessary to meet the educational needs of the growing student populations anticipated in their districts.

This Capital Facilities Plan (CFP) is intended to provide the Lake Stevens School District (District), Snohomish County, the City of Lake Stevens, the City of Marysville and other jurisdictions a description of facilities needed to accommodate projected student enrollment at acceptable levels of service over the next seventeen years (2035), with a more detailed schedule and financing program for capital improvements over the next six years (2020-2025). This CFP is based in large measure on the 2015 Facilities Master Plan for the Lake Stevens School District.

When Snohomish County adopted its GMA Comprehensive Plan in 1995, it addressed future school capital facilities plans in Appendix F of the General Policy Plan¹. This part of the plan establishes the criteria for all future updates of the District CFP, which is to occur every two years. This CFP updates the GMA-based Capital Facilities Plan last adopted by the District in 2018.

In accordance with GMA mandates and Chapter 30.66C SCC, this CFP contains the following required elements:

Element	See Page	/	Table
Future enrollment forecasts for each grade span (elementary, middle, mid-high and high).	5-2		5-2
An inventory of existing capital facilities owned by the District, showing the locations and student capacities of the facilities.	4-2		4-1
A forecast of the future needs for capital facilities and school sites; distinguishing between existing and projected deficiencies.	6-1 6-2		6-1 6-2
The proposed capacities of expanded or new capital facilities.	6-3		6-3
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 that add capacity from those which do not, since the latter are generally not appropriate for impact fee funding. The financing plan and/or the impact fee calculation formula must also differentiate between projects or portions of projects that address existing deficiencies (ineligible for impact fees) and those which address future growth-related needs.	6-3		6-3

Element	See Page / Table	
A calculation of impact fees to be assessed and support data substantiating said fees.	Appendix A	
A report on fees collected through April 2020 and how those funds were used.	6-5	6-4

¹ See Appendix F of this CFP

In developing this CFP, the guidelines of Appendix F of the General Policy Plan¹ were used as follows:

- Information was obtained 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 is to be consistent with the State Office of Financial Management (OFM) population forecasts and those of Snohomish County.
- Chapter 30.66C SCC requires that student generation rates be independently calculated by each school district. Rates were updated for this CFP by Doyle Consulting (See Appendix C).
- The CFP complies with RCW 36.70A (the Growth Management Act) and, where impact fees are to be assessed, RCW 82.02.
- The calculation methodology for impact fees meets the conditions and test of RCW 82.02. Districts which propose the use of impact fees should identify in future plan updates alternative funding sources if impact fees are not available due to action by the state, county or the cities within their district boundaries.

Adoption of this CFP by reference by the County and cities of Marysville and Lake Stevens constitutes approval of the methodology used herein by those entities.

Overview of the Lake Stevens School District

The Lake Stevens School District is located six miles east of downtown Everett and encompasses most of the City of Lake Stevens as well as portions of unincorporated Snohomish County and a small portion of the City of Marysville. The District is located south of the Marysville School District and north of the Snohomish School District.

The District currently serves a student population of 9,200² with seven elementary schools, two middle schools, one mid-high school, one high school and one homeschool partnership program (HomeLink). Elementary schools provide educational programs for students in kindergarten through grade five. Middle schools serve grades six and seven, the mid-high serves grades eight and nine and the high school serves grades ten through twelve. HomeLink provides programs for students from kindergarten through grade twelve. The District employs 589 certificated staff members and 630 classified staff for a total of 1,219.

¹ See Appendix G of this CFP

² October 2019 OSPI 1049 Report

Significant Issues Related to Facility Planning in the Lake Stevens School District

The most significant issues facing the Lake Stevens School District in terms of providing classroom capacity to accommodate existing and projected demands are:

- Continued housing growth in the District;
- The need to have unhoused students before becoming eligible for state construction funding;
- The implementation of full-day kindergarten and reduced class sizes at the K-3 level at all elementary schools;
- Uneven distribution of growth across the district, requiring facilities to balance enrollment;
- Increased critical areas regulations, decreasing the amount of developable areas on school sites;
- An imbalance in the number of elementary schools in the north and south halves of the district;
- Discounted school impact fees and changes to how and when these fees are calculated and paid, none of which supports mitigating the true impact of development;
- The need for additional property and lack of suitable sites within Urban Growth Area (UGA) boundaries to accommodate a school facility;
- The elimination of the ability to develop schools outside of UGAs;
- The inability to add temporary capacity with portable classrooms on school sites without costly stormwater and infrastructure improvements;
- Aging school facilities;
- Projected permanent capacity shortfall by 2025 for K-5 of 1,581 students (with no improvements).

These issues are addressed in greater detail in this Capital Facilities Plan.

SECTION 2: DEFINITIONS

Note: Definitions of terms preceded by an asterisk (*) are provided in Chapter 30.9SCC. They are included here, in some cases with further clarification to aid in the understanding of this CFP. Any such clarifications provided herein in no way affect the legal definitions and meanings assigned to them in Chapter 30.9 SCC.

*Appendix F means Appendix F of the Snohomish County Growth Management Act (GMA) Comprehensive Plan, also referred to as the General Policy Plan (GPP).

*Average Assessed Value average assessed value by dwelling unit type for all residential units constructed within the district. These figures are provided by Snohomish County. The current average assessed value for 2020 is \$423,231 for single-family detached residential dwellings; \$125,314 for one-bedroom (*Small*) multi-family units, and \$178,051 for two or more bedroom (*Large*) multi-family units.

*Boeckh Index (See Construction Cost Allocation)

*Board means the Board of Directors of the Lake Stevens School District (“School Board”).

Capital Bond Rate means the annual percentage rate computed against capital (construction) bonds issued by the District. for 2020, a rate of 2.44% is used. (See also “Interest Rate”)

*Capital Facilities means school facilities identified in the District’s capital facilities plan that are “system improvements” as defined by the GMA as opposed to localized “project improvements.”

*Capital Facilities Plan (CFP) means the District’s facilities plan adopted by its school board consisting of those elements required by Chapter 30.66C SCC and meeting the requirements of the GMA and Appendix F of the General Policy Plan. The definition refers to *this* document, which is consistent with the adopted “2015 Facilities Plan for the Lake Stevens School District,” which is a separate document.

Construction Cost Allocation (formerly the Boeckh Index) means a factor used by OSPI as a guideline for determining the area cost allowance for new school construction. The Index for the 2020 Capital Facilities Plan is \$238.22, as provided by Snohomish County.

*City means City of Lake Stevens and/or City of Marysville.

*Council means the Snohomish County Council and/or the Lake Stevens or Marysville City Council.

*County means Snohomish County.

*Commerce means the Washington State Department of Commerce.

*Developer means the proponent of a development activity, such as any person or entity that owns or holds purchase options or other development control over property for which development activity is proposed.

*Development means all subdivisions, short subdivisions, conditional use or special use permits, binding site plan approvals, rezones accompanied by an official site plan, or building permits (including building permits for multi-family and duplex residential structures, and all similar uses) and other applications requiring land use permits or approval by Snohomish County, the City of Lake Stevens and/or City of Marysville.

*Development Activity means any residential construction or expansion of a building, structure or use of land or any other change of building, structure or land that creates additional demand and need for school facilities, but excluding building permits for attached or detached accessory apartments, and remodeling or renovation permits which do not result in additional dwelling units. Also excluded from this definition is “Housing for Older Persons” as defined by 46 U.S.C. § 3607, when guaranteed by a restrictive covenant, and new single-family detached units constructed on legal lots created prior to May 1, 1991.

*Development Approval means any written authorization from the County and/or City, which authorizes the commencement of a development activity.

*Director means the Director of the Snohomish County Department of Planning and Development Services (PDS), or the Director’s designee.

District means Lake Stevens School District No. 4.

*District Property Tax Levy Rate (Capital Levy) means the District's current capital property tax rate per thousand dollars of assessed value. For this Capital Facilities Plan, the assumed levy rate is .00182.

*Dwelling Unit Type means (1) single-family residences, (2) multi-family one-bedroom apartment or condominium units (“*small unit*”) and (3) multi-family multiple-bedroom apartment or condominium units (“*large unit*”).

*Encumbered means school impact fees identified by the District to be committed as part of the funding for capital facilities for which the publicly funded share has been assured, development approvals have been sought or construction contracts have been let.

*Estimated Facility Construction Cost means the planned costs of new schools or the actual construction costs of schools of the same grade span recently constructed by the District, including on-site and off-site improvement costs. If the District does not have this cost information available, construction costs of school facilities of the same or similar grade span within another District are acceptable.

*FTE (Full Time Equivalent) is a means of measuring student enrollment based on the number of hours per day in attendance at the District’s schools. A student is considered one FTE if they are enrolled for the equivalent of a full schedule each full day.

*GFA (per student) means the Gross Floor Area per student.

*Grade Span means a category into which the District groups its grades of students (e.g., elementary, middle, mid-high and high school).

Growth Management Act (GMA) - means the Growth Management Act (RCW 36.70A).

*Interest Rate means the current interest rate as stated in the Bond Buyer Twenty Bond General Obligation Bond Index. For this Capital Facilities Plan an assumed rate of 2.44% is used, as provided by Snohomish County. (See also “Capital Bond Rate”)

*Land Cost Per Acre means the estimated average land acquisition cost per acre (in current dollars) based on recent site acquisition costs, comparisons of comparable site acquisition costs in other districts, or the average assessed value per acre of properties comparable to school sites located within the District. In 2020 the District estimates land costs to average \$200,000 per acre.

*Multi-Family Dwelling Unit means any residential dwelling unit that is not a single-family unit as defined by Chapter 30.66C. SCC³

*OFM means Washington State Office of Financial Management.

*OSPI means Washington State Office of the Superintendent of Public Instruction.

*Permanent Facilities means school facilities of the District with a fixed foundation.

*R.C.W. means the Revised Code of Washington (a state law).

*Relocatable Facilities (also referred to as portables) means factory-built structures, transportable in one or more sections, that are designed to be used as an education spaces and are needed:

- A. to prevent the overbuilding of school facilities,
- B. to meet the needs of service areas within the District, or
- C. to cover the gap between the time that families move into new residential developments and the date that construction is completed on permanent school facilities.

*Relocatable Facilities Cost means the total cost, based on actual costs incurred by the District, for purchasing and installing portable classrooms.

*Relocatable Facilities Student Capacity means the rated capacity for a typical portable classroom used for a specified grade span.

*School Impact Fee means a payment of money imposed upon development as a condition of development approval to pay for school facilities needed to serve the new growth and development. The school impact fee does not include a reasonable permit fee, an application fee, the administrative fee for collecting and handling impact fees, or the cost of reviewing independent fee calculations.

*SEPA means the State Environmental Policy Act (RCW 43.21C).

*Single-Family Dwelling Unit means any detached residential dwelling unit designed for occupancy by a single-family or household.

*Standard of Service means the standard adopted by the District which identifies the program year, the class size by grade span and taking into account the requirements of students with special needs, the number of classrooms, the types of facilities the District believes will best serve its student population and other factors as identified in the District's capital facilities plan. The District's standard of service shall not be adjusted for any portion of the classrooms housed in relocatable facilities that are used as transitional facilities or from any specialized facilities housed in relocatable facilities.

*State Match Percentage means the proportion of funds that are provided to the District for specific capital projects from the State's Common School Construction Fund. These funds are disbursed based on a formula which calculates district assessed valuation per pupil relative to the whole State assessed valuation per pupil to establish the maximum percentage of the total project eligible to be paid by the State.

*Student Factor (Student Generation Rate [SGR]) means the number of students of each grade span (elementary, middle, mid-high and high school) that the District determines are typically generated by different dwelling unit types within the District³. Each District will use a survey or statistically valid methodology to derive the specific student generation rate, provided that the survey or methodology is approved by the Snohomish County Council as part of the adopted capital facilities plan for each District. (See Appendix C)

*Subdivision means all small and large lot subdivisions as defined in Section 30.41 of the Snohomish County Code.

*Teaching Station means a facility space (classroom) specifically dedicated to implementing the District's educational program and capable of accommodating at any one time, at least a full class of up to 30 students. In addition to traditional classrooms, these spaces can include computer labs, auditoriums, gymnasiums, music rooms and other special education and resource rooms.

*Unhoused Students means District enrolled students who are housed in portable or temporary classroom space, or in permanent classrooms in which the maximum class size is exceeded.

*WAC means the Washington Administrative Code.

³ For purposes of calculating Student Generation Rates, assisted living or senior citizen housing are not included.

SECTION 3: 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 that 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). Educational Program Standards are the same as the minimum level of service as required by Appendix F of the Growth Management Comprehensive Plan.

In addition, 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, English as a second language, remediation, migrant education, alcohol and drug education, preschool and daycare programs, computer labs, music programs, etc. These special or nontraditional educational programs can have a significant impact on the available student capacity of school facilities.

Examples of special programs offered by the Lake Stevens School District at specific school sites include:

- Bilingual Program
- Behavioral Program
- Community Education
- Conflict Resolution
- Contract-Based Learning
- Credit Retrieval
- Drug Resistance Education
- Early Learning Center, which includes ECEAP and developmentally delayed preschool
- Highly Capable
- Home School Partnership (HomeLink)
- Language Assistance Program (LAP)
- Life Skills Self-Contained Program
- Multi-Age Instruction
- Running Start
- Summer School
- Structured Learning Center
- Title 1
- Title 2
- Career and Technical Education

Variations in student capacity between schools are often a result of what special or nontraditional programs are offered at specific schools. These special programs require classroom space, which can reduce the regular classroom capacity of some of the buildings

housing these programs. Some students, for example, leave their regular classroom for a short period of time to receive instruction in these special programs. Newer schools within the District have been designed to accommodate most of these programs. However, older schools often require space modifications to accommodate special programs, and in some circumstances, these modifications may reduce the overall classroom capacities of the buildings.

District educational program requirements will undoubtedly change in the future as a result of changes in the program year, special programs, class sizes, grade span configurations, state funding levels and use of new technology, as well as 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.

In addition, districts are wrestling with the outcomes from the McCleary decision and additional funding and requirements from OSPI and the state Legislature. Many of these outcomes, like full-day kindergarten and reduced class sizes at the elementary level and new graduation requirements at the high school level can have significant impacts to the use of facilities. These will need to be incorporated into the District's facility capacities and uses.

The District's minimum educational program requirements, which directly affect school capacity, are outlined below for the elementary, middle, mid-high and high school grade levels.

Educational Program Standards for Elementary Grades

- Average class size for kindergarten should not exceed **19** students.
- Average class size for grades 1-3 should not exceed **20** students.
- Average class size for grades 4-5 should not exceed **25** students.
- Special Education for students may be provided in a self-contained classroom. The practical capacity for these classrooms is **12** students.
- All students will be provided music instruction in a separate classroom.
- Students may have a scheduled time in a computer lab.
- Optimum design capacity for new elementary schools is 550 students. However, actual capacity of individual schools may vary depending on the educational programs offered.

Educational Program Standards for Middle, Mid-High and High Schools

- Class size for secondary grade (6-12) regular classrooms should not exceed **27** students.
- Special Education for students may be provided in a self-contained classroom. The practical capacity for these classrooms is 12 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 workspace during planning periods, it is not possible to achieve 100% utilization of all regular teaching stations throughout the day. Therefore, classroom capacity is adjusted

using a utilization factor of 83% at the high school, mid-high and middle school levels.

- Some Special Education services for students will be provided in a self-contained classroom.
- Identified students will also be provided other nontraditional educational opportunities in classrooms designated as follows:
 - Resource Rooms (i.e. computer labs, study rooms).
 - Special Education Classrooms.
 - Program Specific Classrooms:
 - Music
 - Physical Education
 - Drama
 - Family and Consumer Sciences
 - Art
 - Career and Technical Education

Optimum design capacity for new middle schools is 750 students. Optimum design capacity for new high schools is 1,500 students. *Actual* capacity of individual schools may vary depending on the educational programs offered.

Minimum Educational Program Standards

The Lake Stevens School 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.

The Lake Stevens School District has set minimum educational program standards based on several criteria. Exceeding these minimum standards will trigger significant changes in program delivery. If there are 25 or fewer students in a majority of K-5 classrooms, the standards have been met; if there are 28 or fewer students in a majority of 6-12 classrooms, the minimum standards have been met. The Lake Stevens School District meets these standards at all grade levels.

Table 3-1 – Minimum Educational Program Standards (MEPS) Met

Grade level	Classrooms above MEPS	Total Classrooms	% Meeting MEPS
Kindergarten	0	28	100%
Primary (grades 1-3)	11	74	85%
Intermediate (grades 4-5)	13	52	75%
Total Elementary	24	154	84%
Total Secondary	30	163	82%
District Total	54	317	83%

It should be noted that the minimum educational program standard is just that, a minimum, and not the desired or accepted operating standard. Also, portables are used to accommodate students within District standards, but are not considered a permanent solution. (See Chapter 4).

SECTION 4: CAPITAL FACILITIES INVENTORY

Capital Facilities

Under GMA, public entities are required to inventory capital facilities used to serve the existing populations. Capital facilities are defined as any structure, improvement, piece of equipment, or other major asset, including land that has a useful life of at least ten years. The purpose of the facilities inventory is to establish a baseline for determining what facilities will be required to accommodate future demand (student enrollment) at acceptable or established levels of service. This section provides an inventory of capital facilities owned and operated by the Lake Stevens School District including schools, portables, developed school sites, undeveloped land and support facilities. School facility capacity was inventoried based on the space required to accommodate the District's adopted educational program standards (see Section 3). A map showing locations of District school facilities is provided as Figure 1.

Schools

The Lake Stevens School District includes: seven elementary schools grades K-5, two middle schools grades 6-7, one mid-high school grades 8-9, one high school grades 10-12, and an alternative K-12 home school partnership program (HomeLink).

The Office of the Superintendent of Public Instruction (OSPI) calculates school capacity by dividing gross square footage of a building by a standard square footage per student. This method is used by the State as a simple and uniform approach for determining school capacity for purposes of allocating available State Match Funds to school districts for school construction. However, this method is not considered an accurate reflection of the capacity required to accommodate the adopted educational program of each individual district. For this reason, school capacity was determined based on the number of teaching stations within each building and the space requirements of the District's adopted education program. These capacity calculations were used to establish the District's baseline capacity and determine future capacity needs based on projected student enrollment. The school capacity inventory is summarized in Table 4-1.

Table 4-1 – School Capacity Inventory

School Name	Site Size (acres)	Bldg. Area (Sq. Ft.)	Teaching Stations - Regular	Teaching Stations - SPED	Perm. Student Capacity*	Capacity with Portables	Year Built or Last Remodel	Potential for Expansion of Perm. Facility
Elementary Schools								
Glenwood Elementary	9.0	42,673	20	3	462	612	1992	Yes
Highland Elementary	8.7	49,727	20	2	455	655	1999	Yes
Hillcrest Elementary	15.0	49,735	23		496	1,021	2008	Yes
Mt. Pilchuck Elementary	22.0	49,833	21	3	487	687	2008	Yes
Skyline Elementary	15.0	42,673	20	3	468	593	1992	Yes
Stevens Creek Elementary	20.0	78,880	26	2	584	584	2018	Yes
Sunnycrest Elementary	15.0	46,970	24		516	691	2009	Yes
Elementary Total	104.7	360,491	154	13	3,468	4,843		
Middle Schools								
Lake Stevens Middle School	25.0	86,374	27	4	682	979	1996	Yes
North Lake Middle School	15.0	90,323	30	4	720	963	2001	Yes
Middle School Total	40.0	176,697	57	8	1,402	1,942		
Mid-High								
Cavelero Mid-High School	37.0	224,694	66	4	1,584	1,584	2007	Yes
Mid-High Total	37.0	224,694	66	4	1,584	1,584		
High Schools								
Lake Stevens High School	38.0	207,195	92	10	2,176	2,176	2019	Yes
High School Total	38.0	207,195	92	10	2,176	2,176		
District Totals	219.7	969,077	369	35	8,630	10,545		

*Note: Student Capacity is exclusive of portables and includes adjustments for special programs.

Leased Facilities

The District does not lease any permanent classrooms.

Relocatable Classrooms (Portables)

Portables are used as interim classroom space to house students until funding can be secured to construct permanent classroom facilities. Portables are not viewed by the District as a solution for housing students on a permanent basis. The Lake Stevens School District currently uses 75 portable classrooms at various school sites throughout the District to provide interim capacity for K-12 students. This compares with 64 portables used in 2018. A typical portable classroom can provide capacity for a full-size class of students. Current use of portables throughout the District is summarized on Table 4-2.

Table 4-2 – Portables

School Name	Portable Classrooms	Capacity in Portables	Portable Area (ft ²)
<u>ELEMENTARY SCHOOLS</u>			
Glenwood	6	150	5,376
Highland	8	200	7,168
Hillcrest	21	525	18,816
Mt. Pilchuck	8	200	7,168
Skyline	5	125	4,480
Stevens Creek			
Sunnycrest	7	175	6,272
Elementary Total	55	1,375	49,280
<u>MIDDLE SCHOOLS</u>			
Lake Stevens Middle	11	297	9,856
North Lake Middle	9	243	8,064
Middle Schools Total	20	540	17,920
<u>MID-HIGH SCHOOL</u>			
Cavelero Mid-High	None		
Mid-High Total			
<u>HIGH SCHOOL</u>			
Lake Stevens High School	None		
High School Total			
District K-12 Total	75	1,915	67,200

The District will continue to purchase or move existing portables, as needed, to cover the gap between the time that families move into new residential developments and the time the District is able to complete construction on permanent school facilities.

Support Facilities

In addition to schools, the Lake Stevens School District owns and operates additional facilities that provide operational support functions to the schools. An inventory of these facilities is provided in Table 4-3.

Table 4-3 – Support Facilities

Facility	Site Acres	Building Area (sq.ft.)
Education Service Center	1.4	13,700
Grounds	1.0	3,000
Maintenance	1.0	6,391
Transportation	6.0	17,550
Support Facility Total	9.4	40,641

Land Inventory

The Lake Stevens School District owns five undeveloped sites described below:

Ten acres located in the northeast area of the District (Lochsloy area), west of Highway 92. This site will eventually be used for an elementary school (beyond the year 2025). It is presently used as an auxiliary sports field.

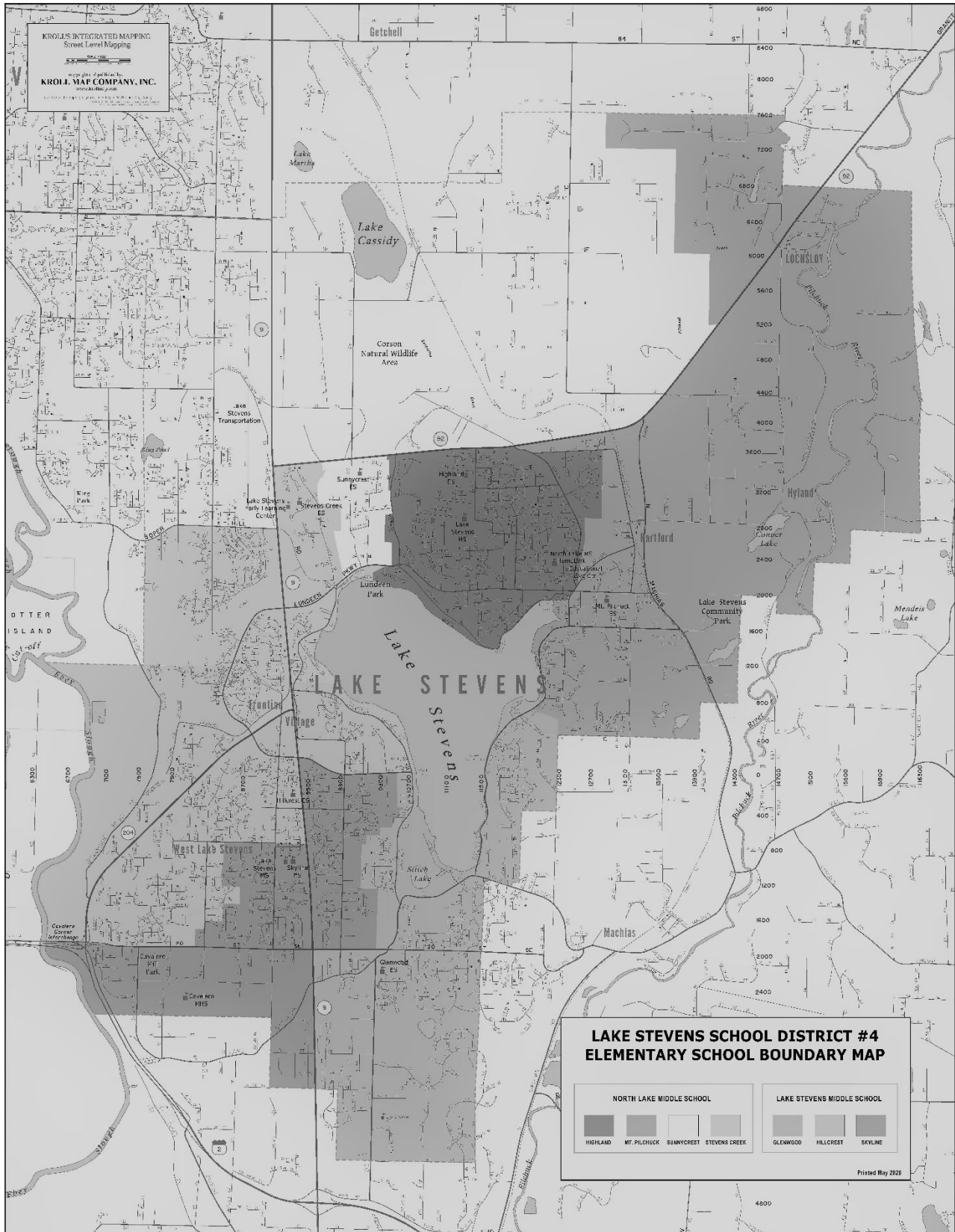
An approximately 35-acre site northeast of the intersection of Highway 9 and Soper Hill Road bordered by Lake Drive on the east. This is the site of the district's newest elementary school and early learning center. The remainder of the site is planned for a future middle school.

A parcel of approximately 23 acres located at 20th Street SE and 83rd Street. This property was donated to the School District for an educational facility. The property is encumbered by wetlands and easements, leaving less than 10 available acres. It is planned to be a future elementary school.

A 20 ft. x 200 ft. parcel located on 20th Street SE has been declared surplus by the Lake Stevens School Board and will be used in exchange for dedicated right-of-way for Cavelero Mid-High.

A 2.42-acre site (Jubb Field) located in an area north of Highway #92 is used as a small softball field. It is not of sufficient size to support a school.

Figure 1 – Map of District Facilities

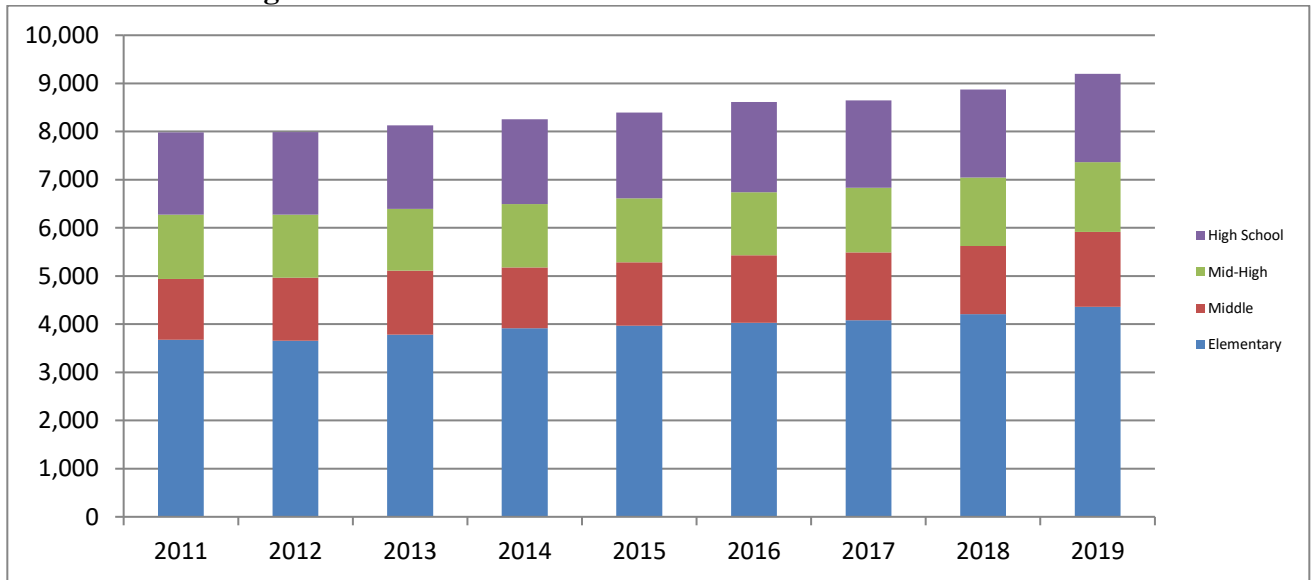


SECTION 5: STUDENT ENROLLMENT TRENDS AND PROJECTIONS

Historic Trends and Projections

Student enrollment in the Lake Stevens School District remained relatively constant between 1973 and 1985 (15%) and then grew significantly from 1985 through 2005 (approximately 120%). Between 2011 and 2019, student enrollment increased by 1,215 students, over 15%. Overall, there was a 2.5% increase countywide during this period, with seven districts losing enrollment. The District has been and is projected to continue to be one of the fastest growing districts in Snohomish County based on the OFM-based population forecast. Population is estimated by the County to rise from 43,000 in 2015 to almost 61,000 in Year 2035, an increase of almost 30%.

Figure 2 – Lake Stevens School District Enrollment 2011-2019



Enrollment projections are most accurate for the initial years of the forecast period. Moving further into the future, economic conditions and demographic trends in the area affect the estimates. Monitoring population growth for the area are essential yearly activities in the ongoing management of the capital facilities plan. In the event 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 projections. Table 5-1 shows enrollment growth from 2011 to 2019 according to OSPI and District records.

Table 5-1 - Enrollment 2011-2019

	2011	2012	2013	2014	2015	2016	2017	2018	2019
Elementary	3,675	3,658	3,783	3,917	3,971	4,030	4,083	4,207	4,362
Middle	1,263	1,307	1,328	1,261	1,314	1,398	1,405	1,414	1,556
Mid-High	1,336	1,313	1,283	1,318	1,331	1,312	1,344	1,426	1,448
High School	1,711	1,709	1,732	1,757	1,776	1,871	1,814	1,828	1,834
Total	7,985	7,987	8,126	8,253	8,392	8,611	8,646	8,875	9,200

The District has used either a Ratio Method for its projections or accepted the projections from the State Office of the Superintendent of Public Instruction (OSPI). The Ratio Method (See Appendix

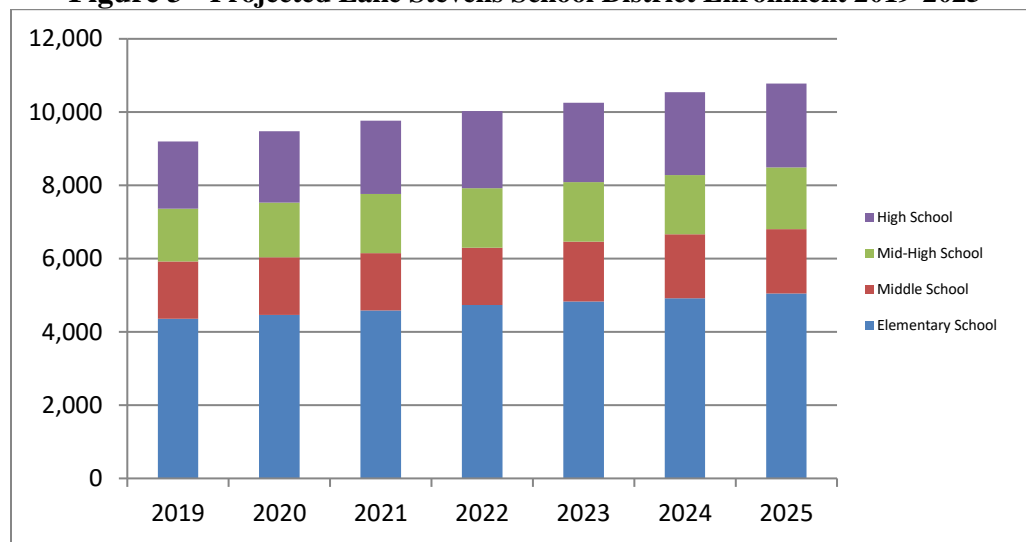
C) estimates future enrollments as a percentage of total population, which is tracked for past years, with assumptions being made for what this percentage will be in future years. Between 2010-2019, the average percentage was just under 20% (19.5%). For future planning, a modest increase of 20.5% was used through 2025 and a figure of 21.8% was used through Year 2035. These assumptions recognize a trend toward lower household sizes coupled with significant growth anticipated in the Lake Stevens area. OSPI methodology uses a modified cohort survival method which is explained in Appendix B.

OSPI Headcount estimates are found in Table 5-2. These have been adopted as part of this Capital Facilities Plan.

Table 5-2 - Projected Enrollment 2019-2025

	2019	2020	2021	2022	2023	2024	2025
Elementary School	4,362	4,466	4,585	4,737	4,831	4,918	5,049
Middle School	1,556	1,568	1,567	1,563	1,632	1,744	1,753
Mid-High School	1,448	1,499	1,613	1,624	1,622	1,618	1,692
High School	1,834	1,946	2,004	2,102	2,172	2,264	2,282
Total	9,200	9,479	9,769	10,026	10,257	10,544	10,776

Figure 3 - Projected Lake Stevens School District Enrollment 2019-2025



In summary, the OSPI estimates that headcount enrollment will total 10,776 students in 2025. This represents a 17.1% increase over 2019. The District accepts the OSPI estimate for its 2020 CFP planning.

2035 Enrollment Projection

The District projects a 2035 student enrollment of 13,279 based on the Ratio method. (OSPI does not forecast enrollments beyond 2025). The forecast is based on the County’s OFM-based population forecast of 60,912 in the District. Although student enrollment projections beyond 2025 are highly speculative, they are useful for developing long-range comprehensive facilities plans. These long-range enrollment projections may also be used in determining future site acquisition needs.

Table 5-3 - Projected 2035 Enrollment

Grade Span	Projected 2035 FTE Student Enrollment
Elementary (K-5)	6,247
Middle (6-7)	2,159
Mid-High (8-9)	2,108
High (10-12)	2,765
District Total (K-12)	13,279

The 2035 estimate represents a 44% increase over 2019 enrollment levels. The total population in the Lake Stevens School District is forecasted to rise by 29%. The total enrollment estimate was broken down by grade span to evaluate long-term site acquisition needs for elementary, middle school, mid-high school and high school facilities. Enrollment by grade span was determined based on recent and projected enrollment trends at the elementary, middle, mid-high and high school levels.

Again, the 2035 estimates are highly speculative and are used only for general planning purposes. Analysis of future facility and capacity needs is provided in Section 6 of this Capital Facilities Plan.

SECTION 6: CAPITAL FACILITIES PLAN

Existing Deficiencies

Current enrollment at each grade level is identified in Table 5-2. The District currently (2019) has 894 unhoused students at the elementary level and 154 unhoused students at the middle school level. It has excess capacity at the mid-high school (394) and high school (342) levels.

Facility Needs (2020-2025)

Projected available student capacity was derived by subtracting projected student enrollment from 2019 permanent school capacity (excluding portables) for each of the six years in the forecast period (2020-2025). The District’s enrollment projections in Table 5-2 have been applied to the existing capacity (Table 4-1). If no capacity improvements were to be made by the year 2025 the District would be over capacity at the elementary level by 1,581 students, 351 students at the middle school level and 106 students at the high school level.

These projected future capacity needs are depicted on Table 6-1. This table compares actual future space needs with the portion of those needs that are “growth related.” RCW 82.02 and Chapter 30.66C SCC mandate that new developments cannot be assessed impact fees to correct existing deficiencies. Thus, any capacity deficiencies existing in the District in 2019 must be deducted from the total projected deficiencies before impact fees are assessed. The percentage figure shown in the last column of Table 6-1 is the “growth related” percentage of overall deficiencies that is used to calculate impact fees.

Table 6-1 - Projected Additional Capacity Needs 2020 – 2025

Grade Span	2019	2020	2021	2022	2023	2024	2025	Growth Related 2020-25
Elementary (K-5)								43.45%
Capacity Surplus/(Deficit)	(894)	(998)	(1117)	(1269)	(1363)	(1450)	(1581)	
Growth Related		(104)	(223)	(375)	(469)	(556)	(687)	
Middle School (6-7)								56.13%
Capacity Surplus/(Deficit)	(154)	(166)	(165)	(161)	(230)	(342)	(351)	
Growth Related		(12)	(11)	(7)	(76)	(188)	(197)	
Mid-High (8-9)								100.00%
Capacity Surplus/(Deficit)	136	85	(29)	(40)	(38)	(34)	(108)	
Growth Related		(51)	(165)	(176)	(174)	(170)	(244)	
High School (10-12)								100.00%
Capacity Surplus/(Deficit)	342	230	172	74	4	(88)	(106)	
Growth Related		(112)	(170)	(268)	(338)	(430)	(448)	

Figures assume no capital improvements.

Forecast of Future Facility Needs through 2035

Additional elementary, middle, mid-high and high school classroom space will need to be constructed between 2020 and 2035 to meet the projected student population increase. The District will have to purchase additional school sites to facilitate growth during this time frame. By the end of the six-year forecast period (2025), additional permanent student capacity will be needed as follows:

Table 6-2 –Additional Capacity Need 2025 & 2035

Grade Level	2019 Capacity	2019 Enrollment	2025 Additional Capacity Needed	2035 Enrollment	2035 Additional Capacity Needed
Elementary	3,468	4,362	1,581	6,247	2,779
Middle School	1,402	1,556	351	2,159	757
Mid-High	1,584	1,448	108	2,108	524
High School	2,176	1,834	106	2,765	589
Total	8,630	9,200	2,146	13,279	4,649

Planned Improvements (2020 - 2025)

The following is a brief outline of those projects likely needed to accommodate unhoused students in the Lake Stevens School District through the Year 2025 based on OSPI enrollment projections.

Elementary Schools: Based upon current enrollment estimates, elementary student population will increase to the level of requiring three new elementary schools. The CFP reflects acquisition of land for two schools and the construction of three elementary schools in 2025, although the exact timing is unknown at this time.

Interim Classroom Facilities (Portables): Additional portables will be purchased in future years, as needed. However, it remains a District goal to house all students in permanent facilities.

Site Acquisition and Improvements: Two additional elementary school sites will be needed in areas where student growth is taking place. The 10-acre Lochsloy property is in the far corner of the district, not in an area of growth and will not meet this need. Affordable land suitable for school facilities will be difficult to acquire.

Support Facilities

The District has added a satellite pupil transportation lot at Cavelero Mid High to support the growing needs for the district. This is a temporary measure until a site can be acquired and a new, larger pupil transportation center can be built.

Capital Facilities Six-Year Finance Plan

The Six Year Finance Plan shown on Table 6-3 demonstrates how the District intends to fund new construction and improvements to school facilities for the years 2020-2025. The financing components include bond issue(s), state match funds, school mitigation and impact fees.

The financing plan separates projects and portions of projects that add capacity from those that do not, since the latter are generally not appropriate for impact fee funding. The financing plan and impact fee calculation formula also differentiate between projects or portions of projects that address existing deficiencies (ineligible for impact fees) and those which address future growth-related needs.

Table 6-3 – 2020-2025 Capital Facilities Plan

Estimated Project Cost by Year (In \$Millions)	2020	2021	2022	2023	2024	2025	Total	Local Cost*	State Match
Improvements Adding Student Capacity									
Elementary									
Site Acquisition									
Acres						22	22		
Purchase Cost						\$4.4	\$4.4	\$4.4	\$0.0
Capacity Addition						1100	1100		
Construction Cost						\$135.00	\$135.00	\$81.00	\$54.00
Capacity Addition						1650	1650		
Middle							-		
Site Acquisition							-		
Acres							-		
Purchase Cost							-		
Capacity Addition							-		
Construction Cost							-		
Capacity Addition							-		
Mid-High							-		
Site Acquisition							-		
Acres							-		
Purchase Cost							-		
Capacity Addition							-		
Construction Cost							-		
Capacity Addition							-		
High School							-		
Site Acquisition							-		
Acres							-		
Purchase Cost							-		
Capacity Addition							-		
Construction Cost							-		
Capacity Addition							-		
Total Cost	\$ -	\$ -	\$ -	\$ -	\$ -	\$ 139.4	\$ 139.4	\$ 85.4	\$ 54.0
Improvements Not Adding Student Capacity									
Elementary									
Construction Cost									
Middle									
Construction Cost									
Mid-High									
Construction Cost									
High School									
Construction Cost									
District-wide Improvements									
Construction Cost									
Total Cost	-	-	-	-	-	-	-	-	-
Elementary (including land acquisition)	-	-	-	-	-	\$ 139.4	\$ 139.4	\$ 85.4	\$ 54.0
Middle	-	-	-	-	-	-	-	-	-
Mid-High	-	-	-	-	-	-	-	-	-
High School	-	-	-	-	-	-	-	-	-
District Wide	-	-	-	-	-	-	-	-	-
Annual Total	-	-	-	-	-	\$ 139.4	\$ 139.4	\$ 85.4	\$ 54.0

*Local Costs include funds currently available, impact fees to be collected and bonds or levies not yet approved.

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 pass a bond. Bonds are then retired through collection of property taxes. A capital improvements bond for \$116,000,000 was approved by the electorate in February 2016. Funds have been used to construct a new elementary school and modernize Lake Stevens High School, as well as fund other non-growth-related projects.

The total costs of the growth-related projects outlined in Table 6-3 represent recent and current bids per information obtained through OSPI, the District’s architect and neighboring school districts that have recently or are planning to construct classroom space. An escalation factor of 6% per year has been applied out to 2025.

State Match Funds: State Match Funds come from the Common School Construction Fund. Bonds are sold on behalf of the fund then retired from revenues accruing predominately from the sale of renewable resources (i.e. timber) from State school lands set aside by the Enabling Act of 1889. If these sources are insufficient to meet needs, the Legislature can appropriate funds or the State Board of Education can establish a moratorium on certain projects.

School districts may qualify for State matching funds for a specific capital project. To qualify, a project must first meet State-established criteria of need. This is determined by a formula that specifies the amount of square footage the State will help finance to house the enrollment projected for the district. If a project qualifies, it can become part of a State prioritization system. This system prioritizes allocation of available funding resources to school districts based on a formula which calculates district assessed valuation per pupil relative to the whole State assessed valuation per pupil to establish the percent of the total project cost to be paid by the State for eligible projects.

State Match Funds can only be applied to major school construction projects. Site acquisition and minor improvements are not eligible to receive matching funds from the State. Because state matching funds are dispersed after a district has paid its local share of the project, matching funds from the State may not be received by a school district until after a school has been constructed. In such cases, the District must “front fund” a project. That is, the District must finance the project with local funds. When the State share is finally disbursed (without accounting for escalation) the future District project is partially reimbursed.

Because of the method of computing state match, the District has historically received approximately 39% of the actual cost of school construction in state matching funds. For its 2020 CFP, the District assumes a 40% match.

School Impact Fees: Development impact fees have been adopted by several jurisdictions as 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 building permits or certificates of occupancy are issued.

Impact fees have been calculated utilizing the formula in Chapter 30.66C SCC. 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 or relocate temporary facilities (portables). Credits have also been applied in the formula to account for state match funds to be

reimbursed to the District and projected future property taxes to be paid by the owner of a dwelling unit. The costs of projects that do not add capacity or which address existing deficiencies have been eliminated from the variables used in the calculations. Only capacity improvements are eligible for impact fees.

Shown on Table 6-4, since 2012 the Lake Stevens School District has collected and expended the following impact fees:

Table 6-4 – Impact Fee Revenue and Expenditures

	Revenue	Expenditure
2020	\$1,604,948	\$ 119,820
2019	\$4,483,964	\$4,177,428
2018	\$1,760,609	\$4,076,918
2016	\$1,595,840	\$1,872,014
2014	\$ 698,188	\$1,389,784
2013	\$1,005,470	\$ 22,304
2012	\$1,526,561	\$-
Total	\$12,675,580	\$11,658,267

The law allows ten years for collected dollars to be spent.

By ordinance, new developments cannot be assessed impact fees to correct existing deficiencies. Thus, existing capacity deficiencies must be deducted from the total projected deficiencies in the calculation of impact fees.

The financing plan separates projects and portions of projects that add capacity from those that do not, since non-capacity improvements are not eligible for impact fee funding. The financing plan and impact fee calculation also differentiate between projects or portions of projects that address existing deficiencies (ineligible for impact fees) and those which address future growth-related needs (Table 6-1). From this process, the District can develop a plan that can be translated into a bond issue package for submittal to District voters, if deemed appropriate.

Table 6-5 presents an estimate of the capacity impacts of the proposed capital construction projects.

Table 6-5 – Projected Growth-Related Capacity (Deficit) After Programmed Improvements

2019	Elementary	Middle	Mid-High	High School
Existing Capacity	3,468	1,402	1,584	2,176
Programmed Improvement Capacity				
Capacity After Improvement	3,468	1,402	1,584	2,176
Current Enrollment	4,362	1,556	1,448	1,834
Surplus (Deficit) After Improvement	(894)	(154)	136	342
2020	Elementary	Middle	Mid-High	High School
Existing Capacity	3,468	1,402	1,584	2,176
Programmed Improvement Capacity				
Capacity After Improvement	3,468	1,402	1,584	2,176
Projected Enrollment	4,466	1,568	1,499	1,946
Surplus (Deficit) After Improvement	(998)	(166)	85	230
2021	Elementary	Middle	Mid-High	High School
Existing Capacity	3,468	1,402	1,584	2,176
Programmed Improvement Capacity	0			
Capacity After Improvement	3,468	1,402	1,584	2,176
Projected Enrollment	4,585	1,567	1,613	2,004
Surplus (Deficit) After Improvement	(1,117)	(165)	(29)	172
2022	Elementary	Middle	Mid-High	High School
Existing Capacity	3,468	1,402	1,584	2,176
Programmed Improvement Capacity				0
Capacity After Improvement	3,468	1,402	1,584	2,176
Projected Enrollment	4,737	1,563	1,624	2,102
Surplus (Deficit) After Improvement	(1,269)	(161)	(40)	74
2023	Elementary	Middle	Mid-High	High School
Existing Capacity	3,468	1,402	1,584	2,176
Programmed Improvement Capacity				
Capacity After Improvement	3,468	1,402	1,584	2,176
Projected Enrollment	4,831	1,632	1,622	2,172
Surplus (Deficit) After Improvement*	(1,363)	(230)	(38)	4
2024	Elementary	Middle	Mid-High	High School
Existing Capacity	3,468	1,402	1,584	2,176
Programmed Improvement Capacity				
Capacity After Improvement	3,468	1,402	1,584	2,176
Projected Enrollment	4,918	1,744	1,618	2,264
Surplus (Deficit) After Improvement*	(1,450)	(342)	(34)	(88)
2025	Elementary	Middle	Mid-High	High School
Existing Capacity	3,468	1,402	1,584	2,176
Programmed Improvement Capacity	1,650			
Capacity After Improvement	5,118	1,402	1,584	2,176
Projected Enrollment	5,049	1,753	1,692	2,282
Surplus (Deficit) After Improvement	69	(351)	(108)	(106)

Impact Fee Calculation Criteria

1. Site Acquisition Cost Element

Site Size: The site size given the optimum acreage for each school type based on studies of existing school sites OSPI standards. Generally, districts will require 11-15 acres for an elementary school; 25-30 acres for a middle school or junior high school; and 40 acres or more for a high school. Actual school sites may vary in size depending on the size of parcels available for sale and other site development constraints, such as wetlands. It also varies based on the need for athletic fields adjacent to the school along with other specific planning factors.

This space for site size on the Variable Table contains a number only when the District plans to acquire additional land during the six-year planning period, 2020 - 2025. As noted previously, the District will need to acquire two additional elementary school sites between 2020 and 2025.

Average Land Cost Per Acre: The cost per acre is based on estimates of land costs within the District, based either on recent land purchases or by its knowledge of prevailing costs in the particular real estate market. Prices per acre will vary throughout the County and will be heavily influenced by the urban vs. rural setting of the specific district and the location of the planned school site. The Lake Stevens School District estimates its vacant land costs to be \$200,000 per acre. Until a site is located for acquisition, the actual purchase price is unknown. Developed sites, which sometimes must be acquired adjacent to existing school sites, can cost well over the \$200,000 per acre figure.

Facility Design Capacity (Student FTE): Facility design capacities reflect the District’s optimum number of students each school type is designed to accommodate. These figures are based on actual design studies of optimum floor area for new school facilities. The Lake Stevens School District designs new elementary schools to accommodate 550 students, new middle schools 750 students and new high schools 1,500 students.

Student Factor: The student factor (or student generation rate) is the average number of students generated by each housing type – in this case: single-family detached dwellings and multiple-family dwellings. Multiple-family dwellings, which may be rental or owner-occupied units within structures containing two or more dwelling units, were broken out into one-bedroom and two-plus bedroom units. Pursuant to a requirement of Chapter 30.66C SCC, each school district was required to conduct student generation studies within their jurisdictions. A description of this methodology is contained in Appendix C. Doyle Consulting performed the analysis. The student generation rates for the Lake Stevens School District are shown on Table 6-6.

Table 6-6 – Student Generation Rates

2020					
Student Generation Rates	Elementary	Middle	Mid-High	High	Total
Single Family	0.362	0.116	0.094	0.125	0.697
Multiple Family, 1 Bedroom	No data	No data	No data	No data	No data
Multiple Family, 2+ Bedroom	0.250	0.073	0.094	0.073	0.490

2018					
Student Generation Rates	Elementary	Middle	Mid-High	High	Total
Single Family	0.337	0.090	0.090	0.112	0.629
Multiple Family, 1 Bedroom	No data	No data	No data	No data	No data
Multiple Family, 2+ Bedroom	0.169	0.071	0.026	0.058	0.324

The table also shows the Student Generation rates from the 2018 CFP. For the last three cycles, the Doyle studies showed no records of one-bedroom apartment construction. The greatest increase was in the elementary, middle and mid-high student generation in 2+ bedroom apartments and condominiums.

2. School Construction Cost Variables

Additional Building Capacity: These figures are the actual capacity additions to the Lake Stevens School District that will occur because of improvements listed on Table 6-3 (Capital Facilities Plan).

Current Facility Square Footage: These numbers are taken from Tables 4-1 and 4-2. They are used in combination with the “Existing Portables Square Footage” to apportion the impact fee amounts between permanent and temporary capacity figures in accordance with Chapter 30.66C. SCC.

Estimated Facility Construction Cost: The estimated facility construction cost is based on planned costs or on actual costs of recently constructed schools. The facility cost is the total cost for construction projects as defined on Table 6-3, including only capacity related improvements and adjusted to the “growth related” factor. Projects or portions of projects that address existing deficiencies (which are those students who are un-housed as of October 2017) are not included in the calculation of facility cost for impact fee calculation.

Facility construction costs also include the off-site development costs. Costs vary with each site and may include such items as sewer line extensions, water lines, off-site road and frontage improvements. Off-site development costs are not covered by State Match Funds. Off-site development costs vary and can represent 10% or more of the total building construction cost.

3. Relocatable Facilities Cost Element

Impact fees may be collected to allow acquisition of portables to help relieve capacity deficiencies on a temporary basis. The cost allocated to new development must be growth related and must be in proportion to the current permanent versus temporary space allocations by the district.

Existing Units: This is the total number of existing portables in use by the district as reported on Table 4-2.

New Facilities Required Through 2025: This is the estimated number of portables to be acquired.

Cost Per Unit: This is the average cost to purchase and set up a portable. It includes site preparation but does not include moveable furnishings in the unit.

Relocatable Facilities Cost: This is simply the total number of needed units multiplied by the cost per unit. The number is then adjusted to the “growth-related” factor.

For districts, such as Lake Stevens, that do not credit any portable capacity to the permanent capacity total (see Table 4-1), this number is not directly applicable to the fee calculation and is for information only. The impact fee allows a general fee calculation for portables; however, the amount is adjusted to the proportion of total square footage in portables to the total square footage of permanent and portable space in the district.

4. Fee Credit Variables

Construction Cost Allocation (formerly the Boeckh Index): This number is used by OSPI as a guideline for determining the area cost allowance for new school construction. The index is an average of a seven-city building cost index for commercial and factory buildings in Washington State, and is adjusted every year for inflation. The current allocation is \$238.22 (January 2020) up from \$225.97 in 2018.

State Match Percentage: The State match percentage is the proportion of funds that are provided to the school districts, for specific capital projects, from the State’s Common School Construction Fund. These funds are disbursed based on a formula which calculates the District’s assessed valuation per pupil relative to the whole State assessed valuation per pupil to establish the percentage of the total project to be paid by the State. The District will continue to use a state match percentage of 40%.

5. Tax Credit Variables

Under Chapter 30.66C SCC, a credit is granted to new development to account for taxes that will be paid to the school district over the next ten years. The credit is calculated using a “present value” formula.

Interest Rate (20-year GO Bond): This is the interest rate of return on a 20-year General Obligation Bond and is derived from the bond buyer index. The current assumed interest rate is 2.44%.

Levy Rate (in mils): The Property Tax Levy Rate (for bonds) is determined by dividing the District’s average capital property tax rate by one thousand. The current levy rate for the Lake Stevens School District is 0.00182.

Average Assessed Value: This figure is based on the District’s average assessed value for each type of dwelling unit (single-family and multiple family). The averaged assessed values are based on estimates made by the County’s Planning and Development Services Department utilizing information from the Assessor’s files. The current average assessed value for 2020 for single-family detached residential dwellings is \$423,231, up from \$349,255 in 2018 and \$290,763 in 2016); \$125,314 for one-bedroom multi-family unit (\$91,988 in 2018; \$79,076 in 2016), and

\$178,051 for two or more bedroom multi-family units (2018 \$136,499; 2016: \$115,893).

6. Adjustments

Growth Related Capacity Percentage: This is explained in preceding sections (See Table 6-1).

Fee Discount: In accordance with Chapter 30.66C SCC, all fees calculated using the above factors are to be reduced by 50%.

Table 6-7 - Impact Fee Variables

Criteria	Elementary	Middle	Mid-High	High
Growth-Related Capacity Percentage	43.45%	56.13%	100.00%	100.00%
Discount (Snohomish County, Lake Stevens and Marysville)	50%	50%	50%	50%
Student Factor	Elementary	Middle	Mid-High	High
Single Family	0.362	0.116	0.094	0.125
Multiple Family 1 Bedroom	No data	No data	No data	No data
Multiple Family 2+ Bedroom	0.25	0.073	0.094	0.073
Site Acquisition Cost Element	Elementary	Middle	Mid-High	High
Site Needs (acres)	22			
Growth Related	9.6	0	0	0
Cost Per Acre	\$200,000.00	\$200,000.00	\$200,000.00	\$200,000.00
Additional Capacity	1100			
Growth Related	477			
School Construction Cost Element	Elementary	Middle	Mid-High	High
Estimated Facility Construction Cost	\$135,000,000	\$0	\$0	\$0
Growth Related	\$58,662,239	\$0	\$0	\$0
Additional Capacity	1650			0
Growth Related	716	0	0	0
Current Facility Square Footage	360,491	176,697	224,694	207,195
Relocatable Facilities Cost Element	Elementary	Middle	Mid-High	High
Relocatable Facilities Cost	\$130,044	\$130,044	\$130,044	\$130,044
Growth Related	\$56,508	\$72,987	\$130,044	\$130,044
Relocatable Facilities Capacity/Unit	25	27	27	27
Growth Related	10	15	27	27
Existing Portable Square Footage	49280	17920	0	0
State Match Credit	Elementary	Middle	Mid-High	High
Cost Construction Allocation	\$238.22	\$238.22	\$238.22	\$238.22
School Space per Student (OSPI)	90	117	117	130
State Match Percentage	40.0%	40.0%	40.0%	40.0%
Tax Payment Credit	Elementary	Middle	Mid-High	High
Interest Rate	2.44%	2.44%	2.44%	2.44%
Loan Payoff (Years)	10	10	10	10
Property Tax Levy Rate (Bonds)	0.00182	0.00182	0.00182	0.00182
Average AV per DU Type	SFR	MF 1 Bdrm	MF 2+ Bdrm	
	423,231	125,314	178,051	
		"small unit"	"large unit"	

Proposed Impact Fee Schedule

Using the variables and formula described, impact fees proposed for the Lake Stevens School District are summarized in Table 6-8 (refer to Appendix A for worksheets).

Table 6-8 - Calculated Impact Fees

Housing Type	Impact Fee Per Unit	Discounted (50%) Impact Fee Per Unit
Single Family Detached	\$19,576	\$9,788
One Bedroom Apartment	\$0	\$0
Two + Bedroom Apartment	\$15,343	\$7,672
Duplex/Townhouse	\$15,343	\$7,672

Appendix A
Impact Fee Calculations

IMPACT FEE WORKSHEET
 LAKE STEVENS SCHOOL DISTRICT
SINGLE-FAMILY RESIDENTIAL

SITE ACQUISITION COST

acres needed	9.60	x	\$ 200,000	/	capacity (# students)	477	x	student factor	0.362	=	\$1,457	(elementary)
acres needed	0.00	x	\$ 200,000	/	capacity (# students)	0	x	student factor	0.116	=	\$0	(middle)
acres needed	0.00	x	\$ 200,000	/	capacity (# students)	0	x	student factor	0.094	=	\$0	(mid-high)
acres needed	0.00	x	\$ 200,000	/	capacity (# students)	0	x	student factor	0.125	=	\$0	(high school)

TOTAL SITE ACQUISITION COST = \$1,457

SCHOOL CONSTRUCTION COST

total const. cost	\$58,662,239	/	capacity (# students)	716	x	student factor	0.362	=	\$29,659	(elementary)
total const. cost	\$0	/	capacity (# students)	0	x	student factor	0.116	=	\$0	(middle)
total const. cost	\$0	/	capacity (# students)	0	x	student factor	0.094	=	\$0	(mid-high)
total const. cost	\$0	/	capacity (# students)	0	x	student factor	0.125	=	\$0	(high school)

Subtotal \$29,659

Total Square Feet of Permanent Space (District) 969,077 / Total Square Feet of School Facilities (000) 1,036,277 = 93.52%

TOTAL FACILITY CONSTRUCTION COST = \$27,736

RELOCATABLE FACILITIES COST (PORTABLES)

Portable Cost	\$ 56,508	/	10	facility size	x	student factor	0.362	=	\$2,046	(elementary)
Portable Cost	\$ 72,987	/	15	facility size	x	student factor	0.116	=	\$564	(middle)
Portable Cost	\$ 130,044	/	27	facility size	x	student factor	0.094	=	\$453	(mid-high)
Portable Cost	\$ 130,044	/	27	facility size	x	student factor	0.125	=	\$602	(high school)

Subtotal \$3,665

Total Square Feet of Portable Space (District) 67,200 / Total Square Feet of School Facilities (000) 1,036,277 = 6.48%

TOTAL RELOCATABLE COST ELEMENT = \$238

CREDIT AGAINST COST CALCULATION -- MANDATORY

STATE MATCH CREDIT

CCA Index	<u>\$ 238.22</u>	x OSPI Allowance	<u>90.00</u>	x	State Match %	<u>40.00%</u>	x	student factor	<u>0.362</u>	=	<u>\$3,104</u>	(elementary)
CCA Index	<u>No projects</u>	x OSPI Allowance	<u>117.00</u>	x	State Match %	<u>40.00%</u>	x	student factor	<u>0.116</u>	=	<u>\$0</u>	(middle)
CCA Index	<u>No projects</u>	x OSPI Allowance	<u>117.00</u>	x	State Match %	<u>40.00%</u>	x	student factor	<u>0.094</u>	=	<u>\$0</u>	(mid-high)
CCA Index	<u>No projects</u>	x OSPI Allowance	<u>130.00</u>	x	State Match %	<u>40.00%</u>	x	student factor	<u>0.125</u>	=	<u>\$0</u>	(high school)
TOTAL STATE MATCH CREDIT											=	<u>\$3,104</u>

TAX PAYMENT CREDIT

(((1+ interest rate	<u>2.44%</u>) [^]	10	years to pay off bond) - 1] /	[interest rate	<u>2.44%</u>	x		
(1 + interest rate	<u>2.44%</u>) [^]	10	years to pay off bond] x	<u>0.00182</u>	capital levy rate	x		
assessed value	<u>423,231</u>							tax payment credit =	<u>\$ 6,751</u>

IMPACT FEE CALCULATION

SITE ACQUISITION COST	<u>\$1,457</u>
FACILITY CONSTRUCTION COST	<u>\$27,736</u>
RELOCATABLE FACILITIES COST (PORTABLES)	<u>\$238</u>
(LESS STATE MATCH CREDIT)	<u>(\$3,104)</u>
(LESS TAX PAYMENT CREDIT)	<u>(\$6,751)</u>
	<u> </u>
	<u> </u>

	Non-Discounted	50% Discount
FINAL IMPACT FEE PER UNIT	\$19,576	\$9,788

IMPACT FEE WORKSHEET

LAKE STEVENS SCHOOL DISTRICT

MULTIPLE FAMILY RESIDENTIAL -- 1 BDRM OR LESS

SITE ACQUISITION COST

acres needed	9.6	x	\$ 200,000	/	capacity (# students)	477	x	student factor	No data	=	\$0	(elementary)
acres needed	0	x	\$ 200,000	/	capacity (# students)	0	x	student factor	No data	=	\$0	(middle)
acres needed	0	x	\$ 200,000	/	capacity (# students)	0	x	student factor	No data	=	\$0	(mid-high)
acres needed	0	x	\$ 200,000	/	capacity (# students)	0	x	student factor	No data	=	\$0	(high school)

TOTAL SITE ACQUISITION COST = \$0

SCHOOL CONSTRUCTION COST

total const. cost	\$58,662,239	/	capacity (# students)	477	x	student factor	No data	=	\$0	(elementary)
total const. cost	\$0	/	capacity (# students)	0	x	student factor	No data	=	\$0	(middle)
total const. cost	\$0	/	capacity (# students)	0	x	student factor	No data	=	\$0	(mid-high)
total const. cost	\$0	/	capacity (# students)	0	x	student factor	No data	=	\$0	(high school)

Subtotal \$0

Total Square Feet of Permanent Space (District)	<u>969,077</u>	/	Total Square Feet of School Facilities (000)	<u>1,036,277</u>	=	93.52%
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TOTAL FACILITY CONSTRUCTION COST = \$ -

RELOCATABLE FACILITIES COST (PORTABLES)

Portable Cost	\$ 56,508	/	10	facility size	x	student factor	No data	=	\$0	(elementary)
Portable Cost	\$ 72,987	/	15	facility size	x	student factor	No data	=	\$0	(middle)
Portable Cost	\$ 130,044	/	27	facility size	x	student factor	No data	=	\$0	(mid-high)
Portable Cost	\$ 130,044	/	27	facility size	x	student factor	No data	=	\$0	(high school)

Subtotal \$0

Total Square Feet of Portable Space (District)	<u>67,200</u>	/	Total Square Feet of School Facilities (000)	<u>1,036,277</u>	=	6.48%
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TOTAL RELOCATABLE COST ELEMENT = \$0

CREDIT AGAINST COST CALCULATION -- MANDATORY

STATE MATCH CREDIT

BOECKH Index	\$ 238.22	x OSPI Allowance	90	x	State Match %	40.00%	x	student factor	No data	=	\$0	(elementary)
BOECKH Index	No projects	x OSPI Allowance	117	x	State Match %	40.00%	x	student factor	No data	=	\$0	(middle)
BOECKH Index	No projects	x OSPI Allowance	117	x	State Match %	40.00%	x	student factor	No data	=	\$0	(mid-high)
BOECKH Index	No projects	x OSPI Allowance	130	x	State Match %	40.00%	x	student factor	No data	=	\$0	(high school)
TOTAL STATE MATCH CREDIT										=	\$0	

TAX PAYMENT CREDIT

$\frac{[(1 + \text{interest rate } 2.44\%)^{10} - 1]}{(1 + \text{interest rate } 2.44\%)^{10} - 1}$	10	years to pay off bond) - 1] /	[interest rate 2.44% x									
assessed value	125,314		0.001816799	capital levy rate	x				tax payment credit	=	\$0	
												\$(1,999)

IMPACT FEE CALCULATION

SITE ACQUISITION COST	\$0
FACILITY CONSTRUCTION COST	\$0
RELOCATABLE FACILITIES COST (PORTABLES)	\$0
(LESS STATE MATCH CREDIT)	\$0
(LESS TAX PAYMENT CREDIT)	(\$1,999)

	Non-Discounted	50% Discount
FINAL IMPACT FEE PER UNIT	\$0	\$0

IMPACT FEE WORKSHEET

LAKE STEVENS SCHOOL DISTRICT

MULTIPLE FAMILY RESIDENTIAL -- 2 BDRM OR MORE

SITE ACQUISITION COST

acres needed	9.60	x	\$ 200,000	/	capacity (# students)	477	x	student factor	0.25	=	\$1,006	(elementary)
acres needed	0	x	\$ 200,000	/	capacity (# students)	0	x	student factor	0.073	=	\$0	(middle)
acres needed	0	x	\$ 200,000	/	capacity (# students)	0	x	student factor	0.094	=	\$0	(mid-high)
acres needed	0	x	\$ 200,000	/	capacity (# students)	0	x	student factor	0.073	=	\$0	(high school)

TOTAL SITE ACQUISITION COST = \$1,006

SCHOOL CONSTRUCTION COST

total const. cost	\$58,662,239	/	capacity (# students)	716	x	student factor	0.25	=	\$20,483	(elementary)
total const. cost	\$0	/	capacity (# students)	0	x	student factor	0.073	=	\$0	(middle)
total const. cost	\$0	/	capacity (# students)	0	x	student factor	0.094	=	\$0	(mid-high)
total const. Cost	\$0	/	capacity (# students)	0	x	student factor	0.073	=	\$0	(high school)

\$20,483

Total Square Feet of Permanent Space (District)	<u>969,077</u>	/ Total Square Feet of School Facilities (000)	<u>1,036,277</u>	=	93.52%
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TOTAL FACILITY CONSTRUCTION COST = \$ 19,154

RELOCATABLE FACILITIES COST (PORTABLES)

Portable Cost	\$ 56,508	/	10	facility size	x	student factor	0.25	=	\$1,413	(elementary)
Portable Cost	\$ 72,987	/	15	facility size	x	student factor	0.073	=	\$355	(middle)
Portable Cost	\$ 130,044	/	27	facility size	x	student factor	0.094	=	\$453	(mid-high)
Portable Cost	\$ 130,044	/	27	facility size	x	student factor	0.073	=	\$352	(high school)

Subtotal \$2,572

Total Square Feet of Portable Space (District)	<u>67,200</u>	/ Total Square Feet of School Facilities (000)	<u>1,036,277</u>	=	6.48%
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TOTAL RELOCATABLE COST ELEMENT = \$167

CREDIT AGAINST COST CALCULATION -- MANDATORY

STATE MATCH CREDIT

BOECKH Index	\$ 238.22	x OSPI Allowance	90	x	State Match %	40.00%	x	student factor	0.25	=	\$2,144	(elementary)
BOECKH Index	No projects	x OSPI Allowance	117	x	State Match %	40.00%	x	student factor	0.073	=	\$0	(middle)
BOECKH Index	No projects	x OSPI Allowance	117	x	State Match %	40.00%	x	student factor	0.094	=	\$0	(mid-high)
BOECKH Index	No projects	x OSPI Allowance	130	x	State Match %	40.00%	x	student factor	0.073	=	\$0	(high school)
TOTAL STATE MATCH CREDIT										=	<u>\$2,144</u>	

TAX PAYMENT CREDIT

$\frac{[(1 + \text{interest rate})^{10} - 1] \times \text{assessed value}}{(1 + \text{interest rate})^{10}}$	$\frac{[\text{interest rate} \times \text{assessed value} \times \text{capital levy rate}]}{\text{assessed value}}$	tax payment credit =	\$
$\frac{[(1 + 2.44\%)^{10} - 1] \times 178,051}{(1 + 2.44\%)^{10}}$	$\frac{[2.44\% \times 178,051 \times 0.00182]}{178,051}$		2,840

IMPACT FEE CALCULATION

SITE ACQUISITION COST	\$1,006
FACILITY CONSTRUCTION COST	\$19,154
RELOCATABLE FACILITIES COST (PORTABLES)	\$167
(LESS STATE MATCH CREDIT)	(\$2,144)
(LESS TAX PAYMENT CREDIT)	(\$2,840)
	<u> </u>

FINAL IMPACT FEE PER UNIT	Non-Discounted	50% Discount
	\$15,343	\$7,672

Appendix B
OSPI Enrollment
Forecasting Methodology

OSPI PROJECTION OF ENROLLMENT DATA

Cohort-Survival or Grade-Succession Technique

Development of a long-range school-building program requires a careful forecast of school enrollment indicating the projected number of children who will attend school each year. The following procedures are suggested for determining enrollment projections:

1. Enter in the lower left corner of the rectangle for each year the number of pupils actually enrolled in each grade on October 1, as reported on the October Report of School District Enrollment, Form M-70, column A. (For years prior to October 1, 1965, enter pupils actually enrolled as reported in the county superintendent's annual report, Form A-1.)
2. In order to arrive at enrollment projections for kindergarten and/or grade one pupils, determine the percent that the number of such pupils each year was of the number shown for the immediately preceding year. Compute an average of the percentages, enter it in the column headed "Ave. % of Survival", and apply such average percentage in projecting kindergarten and/or grade one enrollment for the next six years.
3. For grade two and above determine the percent of survival of the enrollment in each grade for each year to the enrollment in the next lower grade during the preceding year and place this percentage in the upper right corner of the rectangle. (For example, if there were 75 pupils in actual enrollment in grade one on October 1, 1963, and 80 pupils were in actual enrollment in grade two on October 1, 1964, the percent of survival would be $80/75$, or 106.7%. If the actual enrollment on October 1, 1965 in grade three had further increased to 100 pupils, the percent of survival to grade three would be $100/80$ or 125 %.). Compute an average of survival percentages for each year for each grade and enter it in the column, "Ave. % of Survival".

In order to determine six-year enrollment projections for grade two and above, multiply the enrollment in the next lower grade during the preceding year by 7 the average percent of survival. For example, if, on October 1 of the last year of record, there were 100 students in grade one and the average percent of survival to grade two was 105, then 105% of 100 would result in a projection of 105 students in grade two on October 1 of the succeeding year.

4. If, after calculating the "Projected Enrollment", there are known factors which will further influence the projections, a statement should be prepared showing the nature of those factors, involved and their anticipated effect upon any portion of the calculated projection.

*Kindergarten students are projected based on a regression line.

PROJECTED ENROLLMENT BY GRADE -- OSPI

Lake Stevens	2019	2020	2021	2022	2023	2024	2025
Kindergarten	708	734	752	771	789	808	827
Grade 1	747	730	757	776	795	814	834
Grade 2	750	775	758	786	805	825	845
Grade 3	694	768	794	776	805	824	845
Grade 4	727	716	792	819	800	830	850
Grade 5	736	743	732	809	837	817	848
K-5 Headcount	4,362	4,466	4,585	4,737	4,831	4,918	5,049
Grade 6	778	769	777	765	846	875	854
Grade 7	778	799	790	798	786	869	899
6-7 Headcount	1,556	1,568	1,567	1,563	1,632	1,744	1,753
Grade 8	709	802	824	814	822	810	896
Grade 9	739	697	789	810	800	808	796
8-9 Headcount	1,448	1,499	1,613	1,624	1,622	1,618	1,692
Grade 10	686	737	695	787	808	798	806
Grade 11	588	643	690	651	737	757	747
Grade 12	560	566	619	664	627	709	729
10-12 Headcount	1,834	1,946	2,004	2,102	2,172	2,264	2,282
K-12 Headcount	9,200	9,479	9,769	10,026	10,257	10,544	10,776

Appendix C

OFM Ratio Method – 2035 Enrollment Estimate

Enrollment Forecasts OSPI and OFM Ratio Methods

The Growth Management Act requires that capital facilities plans for schools consider enrollment forecasts that are related to official population forecasts for the district. The OFM ratio method computes past enrollment as a percentage of past population and then estimates how those percentage trends will continue.

Snohomish County prepares the population estimates by distributing official estimates from the Washington Office of Financial Management (OFM) to the school district level. SCC 30.66C requires that these official OFM/County population forecasts be used in the capital facilities plans. Each district is responsible for estimating the assumed percentage of population that, in turn will translate into enrollments.

Year	Enrollment	Population	Ratio
2010	7,913	39,977	19.79%
2011	7,985	40,245	19.84%
2012	7,987	40,716	19.62%
2013	8,126	41,402	19.63%
2014	8,253	41,923	19.69%
2015	8,392	43,037	19.50%
2016	8,611	44,348	19.42%
2017	8,646	45,522	18.99%
2018	8,875	46,491	19.09%
2019	9,200	47,141	19.52%
2020	9,479	48,002	19.75%
2021	9,769	48,862	19.99%
2022	10,026	49,723	20.16%
2023	10,257	50,584	20.28%
2024	10,544	51,444	20.50%
2025	10,776	52,305	20.60%
2035	13,279	60,912	21.80%

The District’s assumed percentage trends are applied to these County population forecasts. This is known as the Ratio Method. The District then decides to use either it or the six-year forecast (2025) prepared by the State Office of the Superintendent of Public Instructions (OSPI) for use in the facilities plan. Whichever is used for the 2019-25 planning period, OSPI does not forecast enrollments for Year 2035, so the Ratio Method is used for that purpose, regardless.

The table at left shows actual enrollments and population estimates from 2010-2019, and their resulting ratio (the 2010 population total is an official census figure).

Until 2018 the trend was a declining ratio of students to population. Then the ratio in 2018 and beyond increased annually, reaching an estimated 20.60% in 2025.

2035 Enrollment Estimate

In the District’s 2018 CFP a ratio of 18.90% was used for the 2035 enrollment estimate. Using that number against the County’s 2020 population estimate of 60,912 produces a figure of 11,512 students in 2035. This is only 736 FTEs greater than 2025. Enrollment growth estimates (OSPI) from 2018 – 2025 total 200-300 students per year. If the District were to assume an increase of 250 students per year, that would produce a total of 13,279, a ratio of 21.8%. That would be more consistent with the trends showing for 2022-2025. The District will use this number for its 2035 enrollment estimate.

Appendix D
Student Generation Rates

Student Generation Rate Study Lake Stevens School District

With Grade Levels (K-5, 6-7, 8-9, 10-12)

3/20/2020

This document describes the methodology used to calculate student generation rates (SGRs) for the Lake Stevens 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 Lake Stevens School District from January 2012 through December 2018. 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 Lake Stevens School District as of March 2020. Before proceeding, this data was reformatted, and abbreviations were modified as required to provide consistency with the County Assessor’s data.

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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 1,687 single family detached units were compared with data on 9,380 students registered in the District, and the following matches were found by grade level(s)*:

GRADE(S)	COUNT OF MATCHES	CALCULATED RATE
K	112	0.066
1	102	0.060
2	127	0.075
3	84	0.050
4	99	0.059
5	86	0.051
6	97	0.057
7	99	0.059
8	84	0.050
9	75	0.044
10	89	0.053
11	70	0.041
12	52	0.031
K-5	610	0.362
6-7	196	0.116
8-9	159	0.094
10-12	211	0.125
K-12	1176	0.697

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 fourplexes, triplexes, 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 96 multi-family 2+ BR units were compared with data on 9,380 students registered in the District, and the following matches were found by grade level(s)*:

GRADE(S)	COUNT OF MATCHES	CALCULATED RATE
K	7	0.073
1	2	0.021
2	1	0.010
3	7	0.073
4	3	0.031
5	4	0.042
6	5	0.052
7	2	0.021
8	2	0.021
9	7	0.073
10	2	0.021
11	2	0.021
12	3	0.031
K-5	24	0.25
6-7	7	0.073
8-9	9	0.094
10-12	7	0.073
K-12	47	0.49

6. **Multi-Family 0-1 BR Rates:** Research indicated that no (0) multi-family 0-1 BR units were constructed within District boundaries during the period covered by this study.

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

	K-5	6-7	8-9	10-12	K-12
Single Family	.362	.116	.094	.125	.697
Multi-Family 2+ BR	.250	.073	.094	.073	.490

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

Appendix E
Board Resolution



LAKE STEVENS
School District

**RESOLUTION NO. 13-20:
2020-2025 CAPITAL FACILITIES PLAN**

WHEREAS, the Lake Stevens School District is required by RCW 36.70 (the Growth Management Act) and the Snohomish County General Policy Plan to adopt a Capital Facilities Plan; and

WHEREAS, development of the Capital Facilities Plan was carried out by the District in accordance with accepted methodologies and requirements of the Growth Management Act; and

WHEREAS, impact fee calculations are consistent with methodologies meeting the conditions and tests of RCW 82.02 and Snohomish County Code; and

WHEREAS, the District finds that the methodologies accurately assess necessary additional capacity which address only growth-related needs; and

WHEREAS, a draft of the Plan was submitted to Snohomish County for review with changes having been made in accordance with County comments; and

WHEREAS, the District finds that the Plan meets the basic requirements of RCW 36.70A and RCW 82.02; and

WHEREAS, a review of the Plan was carried out pursuant to RCW 43.21C (the State Environmental Policy Act). A Determination of Non Significance has been issued.

NOW, THEREFORE, BE IT RESOLVED that the Board of Directors of the Lake Stevens School District hereby adopts the Capital Facilities Plan for the years 2020-2025, pursuant to the requirements of RCW 36.70A and the Snohomish County General Policy Plan. The Snohomish County Council, the City of Lake Stevens, and the City of Marysville are hereby requested to adopt the Plan as an element of their general policy plans and companion ordinances.

ADOPTED, by the Board of Directors of the Lake Stevens School District No. 4, Snohomish County, state of Washington, at a regular meeting thereof held this 26th day of August 2020.

**LAKE STEVENS SCHOOL DISTRICT NO. 4
BOARD OF DIRECTORS**

President

[Handwritten signatures of Board Members]

ATTEST:

[Handwritten signature of Superintendent]

Superintendent:

Appendix F
Determination of Nonsignificance

DETERMINATION OF NONSIGNIFICANCE

**Lake Stevens School District No. 4
Capital Facilities Plan 2020-2025**

DESCRIPTION OF PROPOSAL:

The proposed action is the adoption of the Lake Stevens School District No. 4 Capital Facilities Plan, 2020-2025. Board adoption is scheduled to occur on August 26, 2020. This Capital Facilities Plan has been developed in accordance with requirements of the State Growth Management Act and is a non-project proposal. It documents how the Lake Stevens School District utilizes its existing educational facilities given current district enrollment configurations and educational program standards, and uses six-year and 17-year enrollment projections to quantify capital facility needs for years 2020-2025 and 2037.

PROPONENT: Lake Stevens School District No. 4

LOCATION OF PROPOSAL: Lake Stevens School District No. 4
Snohomish County, Washington

LEAD AGENCY: Lake Stevens School District No. 4

The lead agency for this proposal has determined that the proposal does not have a probable significant adverse impact on the environment. An environmental impact statement (EIS) is not required under RCW 43.21C.030(2)(c). This decision was made after review of an environmental checklist and other information on file with the lead agency. This information is available to the public upon request.

This Determination of Nonsignificance (DNS) is issued under WAC 197-11-340(2). The lead agency will not act on this proposal for 14 days from the published date below. Comments may be submitted to the Responsible Official as named below.

RESPONSIBLE OFFICIAL: Robb Stanton
POSITION/TITLE: Executive Director, Operations
ADDRESS: Lake Stevens School District No. 4
12309 22nd Street NE
Lake Stevens, WA 98258
PHONE: 425-335-1506

SIGNATURE:  _____

PUBLISHED: The Everett Herald – July 31, 2020

There is no agency appeal.

Appendix G

Snohomish County General Policy Plan -- Appendix F

Appendix F
REVIEW CRITERIA FOR SCHOOL DISTRICT CAPITAL FACILITY PLANS

Required Plan Contents

1. Future Enrollment Forecasts by Grade Span, including:
 - a 6-year forecast (or more) to support the financing program;
 - a description of the forecasting methodology and justification for its consistency with OFM population forecasts used in the county's comprehensive plan.

2. Inventory of Existing Facilities, including:
 - the location and capacity of existing schools;
 - a description of educational standards and a clearly defined minimum level of service such as classroom size, school size, use of portables, etc.;
 - the location and description of all district-owned or leased sites (if any) and properties;
 - a description of support facilities, such as administrative centers, transportation and maintenance yards and facilities, etc.; and
 - information on portables, including numbers, locations, remaining useful life (as appropriate to educational standards), etc.

3. Forecast of Future Facility Needs, including:
 - identification of new schools and/or school additions needed to address existing deficiencies and to meet demands of projected growth over the next 6 years; and
 - the number of additional portable classrooms needed.

4. Forecast of Future Site Needs, including:
 - the number, size, and general location of needed new school sites.

5. Financing Program (6-year minimum Planning Horizon)
 - estimated cost of specific construction and site acquisition and development projects proposed to address growth-related needs;
 - projected schedule for completion of these projects; and
 - proposed sources of funding, including impact fees (if proposed), local bond issues (both approved and proposed), and state matching funds.

6. Impact Fee Support Data (where applicable), including:
 - an explanation of the calculation methodology, including description of key variables and their computation;
 - definitions and sources of data for all inputs into the fee calculation, indicating that it:
 - a) is accurate and reliable and that any sample data is statistically valid;
 - b) accurately reflects projected costs in the 6-year financing program; and
 - a proposed fee schedule that reflects expected student generation rates from, at minimum, the following residential unit types: single-family, multifamily/studio or 1-bedroom, and multi-family/2-bedroom or more.

Plan Performance Criteria

1. School facility plans must meet the basic requirements set down in RCW 36.70A (the Growth Management Act). Districts proposing to use impact fees as a part of their financing program must also meet the requirements of RCW 82.02.
2. Where proposed, impact fees must utilize a calculation methodology that meets the conditions and tests of RCW 82.02.
3. Enrollment forecasts should utilize established methods and should produce results which are not inconsistent with the OFM population forecasts used in the county comprehensive plan. Each plan should also demonstrate that it is consistent with the 20-year forecast in the land use element of the county's comprehensive plan.
4. The financing plan should separate projects and portions of projects which add capacity from those which do not, since the latter are generally not appropriate for impact fee funding. The financing plan and/or the impact fee calculation formula must also differentiate between projects or portions of projects which address existing deficiencies (ineligible for impact fees) and those which address future growth-related needs.
5. Plans should use best-available information from recognized sources, such as the U.S. Census or the Puget Sound Regional Council. District-generated data may be used if it is derived through statistically reliable methodologies.
6. Districts which propose the use of impact fees should identify in future plan updates alternative funding sources in the event that impact fees are not available due to action by the state, county or the cities within their district boundaries.
7. Repealed effective January 2, 2000.

Plan Review Procedures

1. District capital facility plan updates should be submitted to the County Planning and Development Services Department for review prior to formal adoption by the school district.
2. Each school district planning to expand its school capacity must submit to the county an updated capital facilities plan at least every 2 years. Proposed increases in impact fees must be submitted as part of an update to the capital facilities plan, and will be considered no more frequently than once a year.
3. Each school district will be responsible for conducting any required SEPA reviews on its capital facilities plan prior to its adoption, in accordance with state statutes and regulations.
4. School district capital facility plans and plan updates must be submitted no later than 180 calendar days prior to their desired effective date.
5. District plans and plan updates must include a resolution or motion from the district school board adopting the plan before it will become effective.

LAKEWOOD SCHOOL DISTRICT NO. 306

CAPITAL FACILITIES PLAN

2020-2025

Adopted: August 4, 2020

LAKEWOOD SCHOOL DISTRICT NO. 306

CAPITAL FACILITIES PLAN

2020-2025

BOARD OF DIRECTORS

JAHNA SMITH, PRESIDENT

LARRY BEAN

LEAHA BOSER

CATHERINE “SANDY” GOTTS

STEVEN LARSON

SUPERINTENDENT

SCOTT PEACOCK

For information regarding the Lakewood School District Capital Facilities Plan, contact the Office of the Superintendent, Lakewood School District, P.O. Box 220, North Lakewood, WA 98259-0220. Tel: (360) 652-4500 or Fax: (360) 652-4502.

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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.

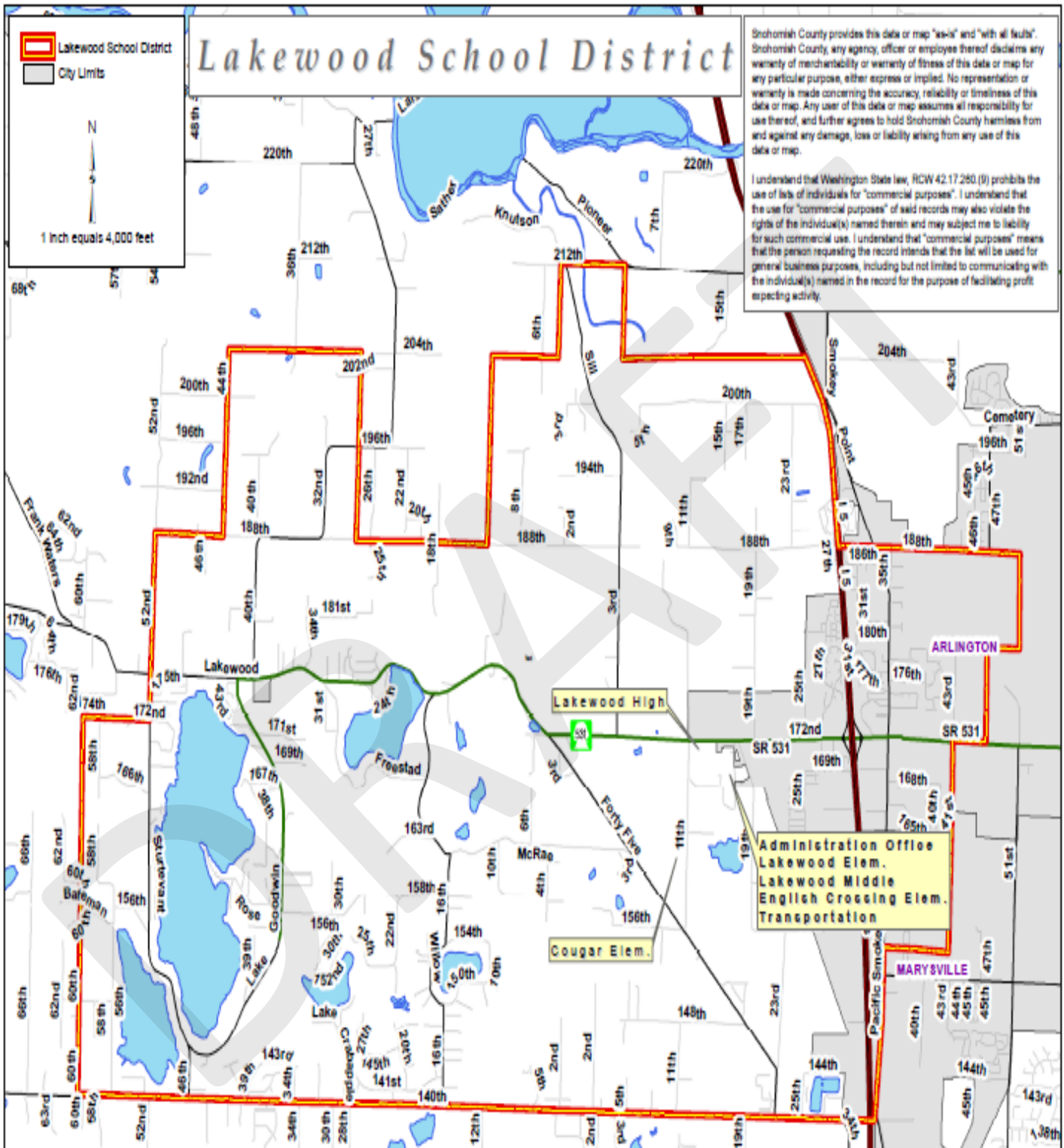
Snohomish County’s Countywide Planning Policies direct jurisdictions in Snohomish County to “ensure the availability of sufficient land and services for future K-20 school needs.” Policy ED-11. The District appreciates any opportunity for cooperative planning efforts with its jurisdictions.

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.

**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		Average Site Cost/Acre	
Elementary	.193		N/A
Middle	.060		
High	.048		
Total	.301		
Student Generation Factors – Multi Family (1 Bdrm)		Temporary Facility Capacity	
Elementary	.033	Capacity	20/26
Middle	.017	Cost	\$250,000
High	.010		
Total	.050		
Student Generation Factors – Multi Family (2+ Bdrm)		State Match Credit	
Elementary	.063	Current State Match Percentage	58.12%
Middle	.045		(not expected)
High	.063		
Total	.170		
Projected Student Capacity per Facility		Construction Cost Allocation	
Lakewood El (addition) – 162		Current CCA	238.22
Lakewood MS (addition) – 198			
Required Site Acreage per Facility		District Average Assessed Value	
Facility Construction/Cost Average		Single Family Residence	\$420,840
Lakewood El (Addition)	\$8,000,000		
Lakewood MS (Addition)	\$12,000,000	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
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%		

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

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 subtotaling on this report will be driven by District Grade spans.
School Facilities and Organization Printed Feb 11, 2020

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



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

Handwritten signature of Tyler Vick in black ink.

Jerry Oelerich
Senior Analyst

Handwritten signature of Jerry Oelerich in black ink.

RE: Student Generation Report—Lakewood School District

This document details the methodology that FLO Analytics (FLO) used to create the Student Generation Rate (SGR) study for Lakewood School District (the District). Also contained is the process for estimation used for multifamily units in place of missing information from The Lodge 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 | PORTLAND: 503 501 5248 | SEATTLE: 206 724 0616
WWW.FLO-ANALYTICS.COM

R:\F1867.01 Lakewood School District\Document\01_2020.03.13 Student Generation Report\Lakewood School District Student Generation Report 2020.docx

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.

FLO reached out to the 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 generated 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 not able to obtain detailed information from Smokey Point Apartments LLC, which consists of The Lodge Apartments Phase 1, 2, and 3. We were able to obtain bedroom type and count data for Phase 3 through CoStar. The percentage of 1 and 2+ bedrooms at Phase 3 were then applied to the total room count at Phase 1 and Phase 2 to create an estimation of the breakdown of bedroom type 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	16	0.193
6-8	5	0.060
9-12	4	0.048
K-12	25	0.301

Multifamily 0 to 1 BR Rates: The multifamily 0-1 bedroom SGR's were calculated by comparing data on 0-1 bedroom multifamily units with the District's student record data, and the number of students at each grade level living in those units was determined. As of this writing, it is estimated that 299 0-1 bedroom units in total were constructed from 2015 to 2019. Matches to current students 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	10	0.033
6-8	2	0.007
9-12	3	0.010
K-12	15	0.050

Multifamily 2+ BR Rates: The multifamily 2+ bedroom SGR's were calculated by comparing data on 2+ bedroom multifamily units with the District's student record data, and the number of students at each grade level living in those units was determined. Without additional data from The Lodge Apartments, it is estimated that 605 2+ bedroom units in total were constructed from 2015 to 2019. Matches to current students are indicated in the table below.

GRADE	MATCHES	RATE
K	9	0.015
1	9	0.015
2	8	0.013
3	7	0.012
4	3	0.005
5	2	0.003
6	11	0.018
7	7	0.012
8	9	0.015
9	13	0.021
10	7	0.012
11	10	0.017
12	8	0.013
K-5	38	0.063
6-8	27	0.045
9-12	38	0.063
K-12	103	0.170

Summary of Student Generation Rates:

Type	K-5	6-8	9-12	K-12
Single Family	0.193	0.060	0.048	0.301
Multifamily 0-1	0.033	0.017	0.010	0.050
Multifamily 2+	0.063	0.045	0.063	0.170

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

APPENDIX C

SCHOOL IMPACT FEE CALCULATIONS

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/
	Acreage	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)									
	%Perm/	Facility	Facility	Student	Student	Student	Cost/	Cost/	Cost/
	Total Sq.Ft.	Cost	Capacity	SFR	MFR (1)	MFR (2+)	SFR	MFR (1)	MFR (2+)
Elementary	97.12%	\$ 8,000,000	161	0.193	0.033	0.063	\$9,314	\$1,593	\$3,040
Middle	97.12%	\$ 12,000,000	198	0.060	0.017	0.045	\$3,532	\$1,001	\$2,649
High	97.12%	\$ -	256	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 Feet)									
	%Temp/	Facility	Facility	Student	Student	Student	Cost/	Cost/	Cost/
	Total Sq.Ft.	Cost	Size	SFR	MFR (1)	MFR (2+)	SFR	MFR (1)	MFR (2+)
Elementary	2.88%	-	20	0.193	0.033	0.063	\$0	\$0	\$0
Middle	2.88%	\$ -	26	0.060	0.017	0.045	\$0	\$0	\$0
High	2.88%	\$ 250,000.00	28	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
							\$5,727	\$1,705	\$2,423
Fee Summary:									
				Single	Multi-	Multi-			
				Family	Family (1)	Family (2+)			
Site Acquisition Costs				\$0	\$0	\$0			
Permanent Facility Cost				\$12,846	\$2,593	\$5,689			
Temporary Facility Cost				\$12	\$3	\$16			
State SCFA Credit				\$0	\$0	\$0			
Tax Payment Credit				(\$5,727)	(\$1,705)	(\$2,423)			
FEE (AS CALCULATED)				\$7,131	\$890	\$3,282			
Fee (AS DISCOUNTED)				\$3,566	\$445	\$1,641			