

**EVERETT SCHOOL DISTRICT No. 2**

# **CAPITAL FACILITIES PLAN**

## **2018-23**



**August 28, 2018**

Produced by Everett School District No. 2

**EVERETT SCHOOL DISTRICT NO. 2**  
**RESOLUTION NO. 1180**  
**Adoption of Capital Facilities Plan 2018-23**

A Resolution of the Board of Directors (the "Board") of the Everett School District No. 2 (the "District") to adopt the Capital Facilities Plan 2018-23 (the "Plan") for school facilities conforming to requirements of the State Growth Management Act and the Snohomish County General Policy Plan.

**WHEREAS**, in August 1998, the Board approved Resolution 651 adopting a Capital Facilities Plan meeting the requirements of RCW 36.70A (the Growth Management Act) and the Snohomish County General Policy Plan; and

**WHEREAS**, in June 2000, September 2002, September 2004, August 2006, August 2008, August 2010, August 2012, August 2014, August 2016, and September 2016 the Board approved Resolutions 700, 742, 799, 860, 907, 1004, 1046, 1095, 1132, and 1138 adopting updated Capital Facilities Plans meeting the requirements of RCW 36.70A (the Growth Management Act) and the Snohomish County General Policy Plan; and

**WHEREAS**, Districts are required to update their Capital Facilities Plans every two years in compliance with the Act and the General Policy Plan; and

**WHEREAS**, this Plan update was developed by the District in accordance with accepted methodologies and requirements of the Growth Management Act; and

**WHEREAS**, the proposed impact fees utilize calculation methodologies meeting the conditions and tests of RCW 82.02; and

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


**WHEREAS**, the Board finds that the Plan meets the basic requirements of RCW36.70A and RCW 82.02; and


**WHEREAS**, the District conducted a review of the Plan in accordance with the State Environmental Policy Act, state regulations implementing the act, and District policies and procedures;

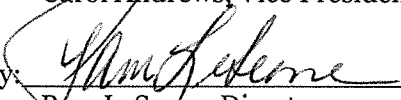
**Now, Therefore, Be It Resolved:**

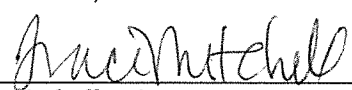
1. The Capital Facilities Plan 2018-23 is hereby adopted by the Board; and
2. The Snohomish County Council is hereby requested to adopt the Plan by reference as part of the capital facilities element of the County's General Policy Plan; and
3. The cities of Mill Creek and Everett are hereby requested to adopt the Plan by reference as part of the Capital Facilities Plan elements of their respective General Policy Plans.

**ADOPTED** this 28th day of August, 2018 and authenticated by the signatures affixed below.

By:   
Caroline Mason, President

By:   
Carol Andrews, Vice President

By:   
Pam LeSeshe, Director

By:   
Traci Mitchell, Director

ATTEST:

By: 

Dr. Gary D. Cohn, Superintendent  
and Secretary for the Board

# **CAPITAL FACILITIES PLAN 2018-2023 EVERETT SCHOOL DISTRICT No. 2**

## **BOARD OF DIRECTORS**

**Caroline Mason, President**  
**Carol Andrews, Vice President**  
**Pam LeSesne, Director**  
**Traci Mitchell, Director**

## **SUPERINTENDENT**

**Dr. Gary D. Cohn**



**August 28, 2018**

For information on the Everett School District's Capital Facilities Plan contact Michael Gunn, Executive Director Facilities and Operations, Everett School District No. 2, P.O. Box 2098, Everett WA 98213, Phone (425) 385-4190, email: [mgunn@everettsd.org](mailto:mgunn@everettsd.org)

# **EVERETT SCHOOL DISTRICT No. 2**

## **CAPITAL FACILITIES PLAN**

### **2018-23**

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## ***Section 1***

### **Introduction**

## **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 Everett School District (District), Snohomish County, and other jurisdictions a description of facilities needed to accommodate projected student enrollment at acceptable levels of service through the year 2035, and a more detailed schedule and financing program for capital improvements over the six-year period, 2018-2023.

In accordance with GMA mandates, and Chapter 30.66C Snohomish County Code (SCC), this CFP contains the following required elements:

- Future enrollment forecasts for each grade span (elementary K-5, middle 6-8, and high 9-12).
- An inventory of existing capital facilities owned by the district, showing the locations, sizes and student capacities of the facilities.
- A forecast of the future needs for capital facilities and school sites, distinguishing between existing and projected deficiencies.
- The proposed capacities of expanded or new capital facilities.
- A 6-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. 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.
- A calculation of impact fees to be assessed and support data substantiating said fees.
- In developing this CFP, the guidelines of Appendix F of the General Policy Plan 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.
- 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 tests of RCW 82.02. 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.

Unless otherwise noted, all enrollment and student capacity data in this CFP is expressed in Full Time Equivalent (FTE) as of October 1 of the year indicated. The district implemented full-day kindergarten at all schools during the 2016-17 school year. For the purpose of this CFP, kindergarten through grade twelve students are considered 1.0 FTE. The FTE enrollment and Head Count (HC) enrollment are equivalent.

### **Overview of the Everett School District**

The Everett School District stretches approximately fifteen miles from its northernmost boundary at the Union Slough to its southernmost boundary at 194th Street S.E. The average width is a little more than two and a half miles. The district covers an area of approximately 39 square miles. The district includes most of the City of Everett, all but a very small portion of the City of Mill Creek, and portions of unincorporated Snohomish County. Total population within the district in 2017 is estimated at 144,602 (Snohomish County GMA Population Forecast).

The district serves 19,854 students FTE (October 2017 – OSPI Report 1049) in seventeen elementary schools, five middle schools, three comprehensive high schools, one alternative high school, and 117 portable classrooms. The full and part-time district staff is approximately 2,300.

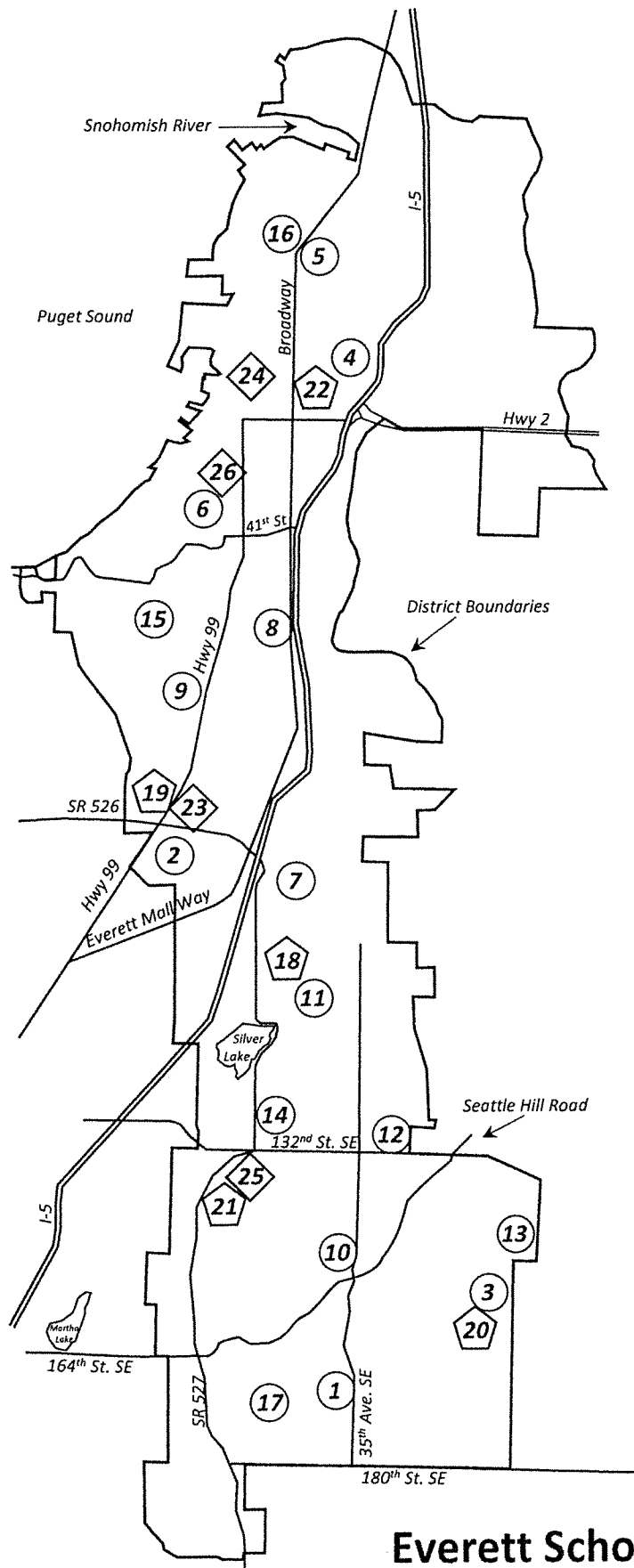
### **Significant Issues Related to Facility Planning in the Everett School District**

The most significant school facility related issues facing the Everett School District are: 1) finding space to implement new state initiatives: K-3 class size reduction (17:1 student to teacher ratio) and Career-Ready & College-Ready Graduation Requirements (24 credits – additional fine arts and lab science); 2) the need to construct new facilities and building additions to meet student enrollment growth; 3) the need to upgrade older facilities so they can continue to serve students in the decades ahead; and 4) the availability of real property appropriate for anticipated future school facilities' needs.

- The district anticipates the need for additional school sites by 2035 for un-housed students at the elementary, middle, and high school levels. This is in addition to the construction of classroom facilities at all grade levels. Projections for un-housed students are based on enrollment growth and planned program changes.
- The district anticipates the availability of appropriate sized property for new schools will continue to be a challenge. The number of suitable, strategically located, properties continue to diminish.

- Everett High School's Gymnasium building is the most recently completed modernization. The project was completed in 2014.
- In addition to major new construction and modernization work on school facilities, the district finds it necessary to address other district-wide needs. Mechanical system upgrades, roofing replacements, seismic upgrades, technology upgrades, and building envelope upgrades are among these needs.
- Most recently, the district's construction program has been financed in large part by the passage of a \$149.7 million capital bond measure in 2016. The 2016 capital bond will finance the following: new elementary school No. 18, North Middle School modernization & partial replacement, Woodside Elementary School modernization & partial replacement, Everett High School Main Building exterior finish, HVAC upgrades, Everett High School Lincoln Field synthetic turf replacement, roofing replacements, the purchase of property for a future elementary school, and the purchase and placement of portable classrooms.
- The passage of an \$89.6 million capital levy measure in 2016 will finance the following: safety and security upgrades, flooring replacements, roofing replacements, fire alarms replacements, painting projects, equitable access to technology for all students, technology infrastructure upgrades, and purchase of portable classrooms.
- In 2014, the district sought voter approval of a \$259.4 million bond measure. The bond proposal failed to receive the required 60% approval threshold in two different elections.
- In 2010, a \$48 million six-year capital levy received voter approved. The levy included district-wide technology upgrades, roofing replacements, flooring replacements, HVAC upgrades, and other well needed projects.
- Other funding has come from state financing assistance, school growth mitigation and school impact fees.





**Figure 1**  
**Map of School Facilities**



Approximate Scale: 1 mile

**School Facilities**  
**Elementary Schools**

1. Cedar Wood
2. Emerson
3. Forest View
4. Garfield
5. Hawthorne
6. Jackson
7. Jefferson
8. Lowell
9. Madison
10. Mill Creek
11. Monroe
12. Penny Creek
13. Silver Firs
14. Silver Lake
15. View Ridge
16. Whittier
17. Woodside

**Middle Schools**

18. Eisenhower MS
19. Evergreen MS
20. Gateway MS
21. Heatherwood MS
22. North MS

**High Schools**

23. Cascade HS
24. Everett HS
25. HM Jackson HS
26. Sequoia HS

**Everett School District No. 2**

## ***Section 2***

### **Definitions**

## SECTION 2: DEFINITIONS

Note: Definitions of terms preceded by an asterisk (\*) are provided in Snohomish County Council Ordinance 97-095 as amended by Snohomish County Council Ordinance 99-107. They are included here, in some cases with further clarification to aid in the understanding of the Capital Facilities Plan. Any such clarifications provided herein in no way affect the legal definitions and meanings assigned to them in Snohomish County Council Ordinance 97-095, as amended.

- \* **Appendix F** - Appendix F of the Snohomish County Growth Management Act (GMA) Comprehensive Plan also referred to as the General Policy Plan (GPP).
- \* **Average Assessed Value** - the average assessed value, by dwelling unit type, of all residential units constructed within the district. For the Capital Facilities Plan 2018-23, the average assessed values are: \$392,665 for single family dwellings; \$189,310 for “large unit” multiple family (2 or more bedrooms); and \$127,578 for “small unit” multiple Family (1 bedroom or studio). These figures provided by Snohomish County.
- Board** - the Board of Directors of the Everett School District No. 2 (“School Board”).
- \* **Capital Facilities** - school facilities identified in the district's capital facilities plan and are “system improvements” as defined by the GMA as opposed to localized “project improvements”.
- \* **Capital Facilities Plan (CFP)** - 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.
- Class Size Goals** – the class size goals are the maximum number of students assigned to a teacher. The goals are listed in the Everett Education Association Collective Bargaining Agreement.
- \* **Construction Cost Allocation (CCA)** - it is used by OSPI as a guideline for determining the area cost allowance for new school construction. The current Construction Cost Allocation, provided by the Office of Superintendent of Public Instruction (OSPI) and Snohomish County, is \$225.97.
- \* **Council** - Snohomish County Council.
- \* **County** - Snohomish County.
- \* **Developer** - the proponent of a development activity, such as any person or entity who owns or holds purchase options or other development control over property for which development activity is proposed.
- \* **Development** - 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.

- \* **Development Activity** - 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** - any written authorization from the County which authorizes the commencement of a development activity.
- \* **Director** - the Director of the Snohomish County Department of Planning and Development Services (PDS), or the Director's designee.
- District** - Everett School District No. 2.
- \* **District Property Tax Levy Rate** - the district's current capital property tax rate per thousand dollars of assessed value. For the Capital Facilities Plan 2018-23, the assumed levy rate is .001836.
- \* **Dwelling Unit Type** – (1) single-family residences (SF), (2) multi-family one-bedroom apartment or condominium units ("small unit") (MF 0-1 bedroom), and (3) multi-family multiple-bedroom apartment, condominium, townhome, or multiplex units ("large unit") (MF 2+ bedrooms).
- \* **Encumbered** - 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** - 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.
- \* **Facility Design Capacity** - the number of students each school type is designed to accommodate; based on the district's standard of service as determined by the district.
- \* **Full Time Equivalent (FTE)** - a means of measuring student enrollment based on the number of hours per day in attendance at district schools. A student is considered 1.0 (one) FTE if he/she is enrolled for the equivalent of a full schedule each school day. For the purpose of the CFP, kindergarten through grade twelve students are considered 1.0 FTE.
- GFA (per student)** - the Gross Floor Area per student.
- \* **Grade Span** - a category into which the district groups its grades of students (e.g., elementary, middle, and high school). Grade spans for the Everett School district include grades K-5 for elementary level, grades 6-8 for middle school, and grades 9-12 for senior high school.
- \* **Growth Management Act (GMA)** - the Growth Management Act (RCW 36.70A)
- Head Count (HC)** - a means of measuring student enrollment based on the number of students enrolled.
- \* **Interest Rate** - the current interest rate as stated in the Bond Buyer Twenty-Bond General Obligation Bond Index. For the Capital Facilities Plan 2018-23 an assumed rate of 3.85% is used, as provided by Snohomish County.

- \* **Land Cost Per Acre** - 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. Based on recent analysis of available property and the price of recently acquired property. For this CFP the value we are using is: \$333,333 per acre.
- \* **Multi-Family Dwelling Unit** - any residential dwelling unit that is not a single-family unit as defined by the ordinance Chapter 30.66C. Parcels with two or more units per residential structure, including attached units and attached residential condominiums and or townhomes. For purposes of calculating Student Generation Rates, assisted living / senior citizen housing are not included in this definition.
- \* **OFM** - Washington State Office of Financial Management.
- \* **OSPI** - Washington State Office of Superintendent of Public Instruction.
- \* **Permanent Facilities** - school facilities of the district with a fixed foundation.
- Portables** - Synonym for relocatable facilities.
- \* **RCW** - Revised Code of Washington.
- \* **Relocatable Facilities (Portables)** - factory-built structures, transportable in one or more sections; designed to be used as education spaces; needed to prevent the overbuilding of school facilities; to meet the needs of service areas within the district; or 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** - the total cost, based on actual costs incurred by the district, for purchasing and installing portable classrooms.
- \* **Relocatable Facilities Student Capacity** - the rated capacity for a typical portable classroom used for a specified grade span.
- \* **School Impact Fee** - payment of money imposed upon development as a condition of development approval to pay for school facilities needed to serve 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** - State Environmental Policy Act (RCW 43.21C)
- \* **Single-Family Dwelling Unit** - any detached residential dwelling unit designed for occupancy by a single family or household.
- \* **Standard of Service** - 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 which are used as transitional facilities or from any specialized facilities housed in relocatable facilities.

- \* **State Funding Assistance Percentage** - 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. The 2018 state funding assistance percentage for the district is: 56.02%
- \* **Student Factor [Student Generation Rate (SGR)]** - the number of students of each grade span (elementary, middle, high school) that the district determines are typically generated by different dwelling unit types within the district. 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 B)
- \* **Subdivision** – all small and large lot subdivisions: and all short subdivisions as defined in Chapter 30.41 of the Snohomish County Code.
- \* **Teaching Station** - 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 32 students. In addition to traditional classrooms, these spaces can include: computer labs, auditoriums, gymnasiums, music rooms, and other special education and resource rooms.

**Un-Housed Students** - district enrolled students projected to be housed in portable or temporary classrooms space, or in permanent spaces in which the maximum class size exceeds standards within the district.

**WAC** - Washington Administrative Code

### ***Section 3***

### ***Educational Program Standards***

## **SECTION 3: EDUCATIONAL PROGRAM STANDARDS**

### **Educational Program Standards – District wide**

School facility and student capacity needs are dictated by the types and amount of space required to accommodate the school board adopted educational programs. 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).

In addition, government initiatives as well as community expectations may affect how classroom space is used. Traditional educational programs offered by the Everett School District are supplemented by nontraditional or specialized programs.

Examples of specialized teaching stations and programs:

- Accelerated Learning Support (ALS)
- Advanced Placement
- Athletics, Health and Fitness
- Career and Technical Education
- Contract Learning
- Computer Labs
- Counseling (career and mental health)
- Early Childhood Educational Assistance Program (ECEAP)
- English Language development (EL)
- Elementary Music (designated classroom)
- Health Education
- Health Services
- High school credit class offered at middle schools
- Highly Capable Programs
- Intervention Programs
- Learning Assistance Programs
- Leadership and Activities
- Library Instruction
- Online High School
- Partnerships
  - Lighthouse Cooperative
  - PTSA
  - Port Gardner Parent Partnership
  - Mental Health providers
  - Natural Leaders
- Readiness to Learn Parent Center
- Robotics
- Science Resource Center
- Special Education
  - Achieve (behavior support)



- Deaf and Hard of Hearing Specialists
- Developmental Kindergarten
- Developmental Pre-School
- Extended Resource Room
- Life Skills
- Occupational / Physical Therapy
- 18-21 programs
  - GOAL – Gaining Ownership of Adult Life
  - STRIVE – Students Transitioning Responsibly into Vocational Experiences
- Resource Room
- School Psychologists
- Speech and Hearing Therapy
- Vision Impaired Service
- Technology Instruction
- Time-Out Room (In-School Suspension)
- Title I Programs
  - Reading
  - Math
- Career and Technical Education (CTE)
  - Auto Shop
  - Business and Marketing
  - Health and Human Services
  - Horticulture, Agriculture, and Floriculture
  - Technology and Industry
- Wireless Computer Carts

These specialized or nontraditional educational programs can have a significant impact on the student capacity of school facilities. Variations in student capacity between schools are often a result of the number of specialized programs offered at specific schools. These specialized programs require classroom space, which can reduce the permanent capacity of the buildings housing these programs. For example, some students leave their regular classroom for a period of time to receive instruction in these specialized programs. Newer schools within the district have been designed to accommodate many of these programs. However, older schools often require space modifications to accommodate specialized programs, and in some circumstances, these modifications may reduce the overall classroom capacities of the building.

District educational program standards will undoubtedly change in the future as a result of changes in the program year, specialized programs, class size, 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 changes to the revised educational program standards.

## Educational Program Standards - Elementary Schools

- School capacity is determined using the follow:

<u>Students per room</u>	<u>Grade level / Program</u>
18	Kindergarten
21	General Education - Grades 1-3
24	General Education - Grades 4-5
10	Special Education - Pre-School (self-contained)
10	Special Education - Kindergarten (self-contained)
10	Special Education - Achieve (behavior support)
15	Special Education - Extended Resource Room
10	Special Education - Life Skills
- Students are provided music and technology instruction.
- At least one Special Education Resource Room is part of the curriculum.
- Design capacity for new schools:
  - 600 students
- Actual capacity of individual schools may vary depending on the educational programs offered and/or housed at a particular school.

## Educational Program Standards – Middle Schools and High Schools

As a result of scheduling conflicts for student programs, the need for specialized rooms for specific programs, and the need for teachers to have a workspace during planning periods, it is not possible to achieve 100% utilization of teaching stations. Based on an analysis of actual utilization of secondary schools, the standard utilization rate is 85%, resulting in the following target class sizes.

### Middle School

- School capacity is determined using the follow:

<u>Students per room</u>	<u>Grade level / Program</u>
24	General Education - Grades 6-8
24	Special Education - Resource Room
10	Special Education - Achieve (behavior support)
15	Special Education - Extended Resource Room
10	Special Education - Life Skills
18	English Language Learner (ELL)

### High School

- School capacity is determined using the follow:

<u>Students per room</u>	<u>Grade level / Program</u>
24	General Education - Grades 9-12
24	Special Education - Resource Room
10	Special Education - Achieve (behavior support)
15	Special Education - Extended Resource Room
10	Special Education - Life Skills
18	English Language Learner (ELL)

## **Middle School and/or High School**

- Students are also provided educational opportunities such as:
  - Art Labs
  - Auto Shop (high school only)
  - Challenge, College in the High School, and Advanced Placement Program
  - Computer Labs
  - Drama rooms (high school only)
  - Health and Fitness
  - Marketing (high school only)
  - Music rooms
  - Navy Junior Reserve Officer Training Corps (high school only)
  - Science / STEM Labs
- Design capacity for new schools:
  - Middle schools = 825 students
  - High schools = 1500 students
- Actual capacity of individual schools may vary depending on the educational programs offered and/or housed at a particular school.

## **Minimum Levels of Service**

RCW 36.70A.020 requires that public facilities and services necessary to support new housing developments shall be adequate to serve the development at the time the development is available for occupancy and use without decreasing current service levels below locally established minimum standards. These “minimum levels of service” in the Everett School District are established as an average class size no larger than the following:

- **Class Size Goals**
  - 24 Kindergarten
  - 25 Grades 1-3 General Education
  - 26 Grade 4 General Education
  - 27 Grade 5 General Education
  - 29 Grades 6-8 General Education
  - 30 Grades 9-12 General Education
- **2017 Actual Class Size Average - based on the October 1, 2017 count of student enrollment**
  - 21.2 Kindergarten
  - 22.6 Grades 1-3 General Education
  - 25.6 Grades 4-5 General Education
  - 23.3 Grades 6-8 General Education
  - 23.0 Grades 9-12 General Education

## School Boundary Changes

The Everett School District recognizes that school boundaries need to be modified occasionally to respond to changes in student enrollment and/or educational programs. Boundary changes can be an effective method of reducing the need for new school construction, and are also necessary when new schools or classroom additions are built. A good example of changing school boundaries to reduce the need for new schools occurred in the fall of 2015 when the district instituted a limited re-configuration of elementary school boundaries in response to significant enrollment growth at Woodside Elementary School in the southern end of the district. The district recently completed the process of adjusting elementary school boundaries in preparation of opening elementary #18 in the fall of 2019.

Boundary changes can be perceived as disruptive to the educational program and the lives of our students and their parents. Therefore, before implementing any boundary changes, careful consideration of the following should be given

- **Care:** The potential impacts, both positive and negative, of any boundary change shall be carefully considered
- **Inclusion:** Boundary changes should only be implemented after appropriate opportunities for input and discussions with affected parties and careful consideration of alternative solutions
- **Solutions:** Boundary changes should be made in the context of long term solutions; short term solutions not addressing long term issues should be avoided
- **Preparation:** Boundary changes should be approved with enough lead time to allow families to plan and prepare for implementation of the changes
- **Neighborhoods:** Students should be able to attend schools located in close proximity to their own neighborhood, and, if possible, all students living in a neighborhood should attend the same schools
- **Barriers:** Natural or manmade barriers to safe and efficient transportation routes should be taken into consideration, including pedestrian as well as vehicular transportation
- **Inequity:** Boundary changes should be made only after considering where inequities might lie in current boundaries and potential boundary changes; changes that create new or perpetuate existing inequities should be avoided
- **Continuity:** Consideration should be given to maintaining consistent elementary school to middle school to high school feeder patterns – where possible
- **Efficiency:** Transportation routes should be as efficient and reliable as possible while minimizing the amount of time a student spends in transit to and from school

## Future Trends in Programs, with Potential Impacts on district facilities

- **STEM (Science, Technology, Engineering, and Math)** – Programs integrating science, technology, engineering, and mathematics; including career and technical education, manufacturing, and biomechanics
- Technology required for CTE / STEM / AP programs
- Integration of STEM into core curriculum

- Flexible space for multiple uses – “maker” spaces, robotics, project-based learning, etc.
- Extended learning opportunities – after-school and/or summer activities
- Expansion of high school credit class offerings at middle schools (science, languages, etc.)
- 1:1 technology for students
- Early learning programs - Birth to 3 years and 3 to 5 years
- Industry pathway partnerships
- Post high school support opportunities
- Technology accessibility for community
- Support for strategic partners whose work is aligned with the district’s student learning mission
- Centralized storage and staging facilities for assessment, curriculum and textbooks, and STEM materials
- Expanded music offerings such as orchestra (strings)
- Cost effective solutions for serving high-need students that are currently outsourced to programs, such as the NW Regional Learning Center and Denny Youth Center

### **Grades K-3 Class Size Reduction**

During the 2010 Legislative Session, Substitute House Bill (SHB) 2776 was passed. Part of this bill is an enhancement to reduce the average class size for grades K-3 to a 17:1 ratio of students per K-3 teacher by the 2017-18 school year. In the fall of 2018 the district will implement staffing to meet these requirements.

### **District Strategic Plan**

On May 23, 2017 the school board approved the Strategic Plan 2017-2018, which provides the strategic direction for all district activities including the Capital Facilities Plan. The mission, vision, core values and strategic priorities in the strategic plan are as follows:

#### **Mission**

- To inspire, educate, and prepare each student to achieve to high standards, contribute to our community, and thrive in a global society.

#### **Vision**

- Our students will lead and shape the future.
  - They will be well-rounded, healthy, and flexible thinkers with a global perspective who can access resources and collaborate.
  - They will demonstrate empathy, pride, and advocacy for self, school, and community while respecting the diversity and worth of others.
  - They will acquire the knowledge, attitudes and skills to adapt to the emerging needs of a changing world.

## Core Values

- Our core values drive our actions and behavior.
  - **Learning** We believe each student has the ability to learn and achieve to high standards.
  - **Equity** We honor and support each student's right to learn and achieve.
  - **Integrity** We act in good faith, serving others with honesty and dignity. We serve as steward of the public trust.
  - **Passion** We are passionate about teaching and learning.
  - **Respect** We value differences among people and treat one another with respect.
  - **Diversity** We embrace diversity as an essential asset; we are inclusive and treat our differences as a core strength.
  - **Collaboration** We believe in learning and working together, the value of diverse views, and the power of collective wisdom.

## Strategic Priorities

- **Teaching and Learning** - Align curriculum, instruction, and assessment to educate, inspire, and prepare each student to graduate, to contribute to our community, and thrive in a global society.
- **Inspiration, Innovation, and Information** - Foster innovation to serve current and future needs of diverse learners; support innovative approaches to develop, identify, and use information and technology.
- **People, Structure, and Systems** - Develop people, structures, and systems to support student learning in a culture of mutual respect and intellectual engagement.
- **Resource Management** - Generate, align, and coordinate all available resources to serve the best interests of the students. Develop flexibility and adaptability to achieve our mission in a changing economic environment.
- **Strategic Relationships** - Develop intentional partnerships and strategic relationships to support student learning.

## ***Section 4***

### **Capital Facilities Inventory**

## **SECTION 4: CAPITAL FACILITIES INVENTORY**

Under the GMA, cities and counties are required to inventory capital facilities used to serve existing development. The purpose of the following facilities inventory is to establish a baseline for determining what facilities will be required to address existing deficiencies and 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 Everett 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 educational program standards outlined in Section 3. A map showing locations of district school facilities is provided in Figure 1 on page 1-4.

### **Schools**

Everett School District elementary schools include grades K-5, middle schools include grades 6-8, and high schools include grades 9-12.

OSPI calculates school capacity by dividing gross square footage of a building by a standard square footage per student. OSPI uses the following in their calculations: 90 s.f. per kindergarten through sixth grade student, 117 s.f. per seven and eight grade student, 130 sq. ft. per nine through twelve grade student, and 144 sq. ft. per disabled student (WAC 392-343-035). This method is used by the state as a simple and uniform approach for determining school capacity for purposes of allocating available state funding assistance to school districts for school construction.

This method is not considered an accurate reflection of the capacity required to accommodate the educational programs of each individual school and/or district.

For this CFP, capacity is based on the number of teaching stations within each building and the space requirements of the specific educational program as described in Section 3. The school capacity inventory is summarized in Table 1.

### **Portables**

Portables are used as interim classroom space to house students until permanent classroom facilities can be provided and to prevent overbuilding. Portables are not a solution for housing students on a permanent basis. The portables capacity inventory is summarized in Table 2.

For this CFP, the costs of portable relocations have not been included in the formula for determining developer impact fees.

### **Support Facilities**

In addition to schools, the Everett School District owns and operates additional facilities which provide operational support functions to the schools. An inventory of these facilities is provided in Table 3.



## Undeveloped Land

The Everett School District owns the following additional sites not currently used for school purposes:

- 35th Street & Grand Avenue
  - 1.38 acres
  - Long term lease with the City of Everett - Doyle Park
- 36<sup>th</sup> Street & Norton Avenue
  - 2.96 acres
  - Currently used as a neighborhood playfield
- Cadet Way Property
  - 9.81 acres
  - Located north of Jefferson ES
- Seattle Hill Road & State Route 527
  - 18.94 acres
- 180th Street SE
  - 44.1 acres
  - Future site of elementary school #18 and comprehensive high school #4

**Table 1**  
**School Capacity Inventory**

School Name	Site Size (acres)	Building Area (Sq. Ft.) (1)	Teaching Stations General Education	Teaching Stations Special Education	2017 Permanent Student Capacity (2)	2018 Permanent Student Capacity (3)	Teaching Stations Not Generating Capacity (4)
<b>Elementary Schools</b>							
Cedar Wood	14.40	55,454	21	2	523	473	3
Emerson	8.05	52,796	24	1	498	498	2
Forest View	15.30	66,629	23	2	554	508	3
Garfield	5.60	52,744	19	2	441	441	3
Hawthorne	8.84	72,395	22	4	494	494	3
Jackson	5.16	51,652	14	3	300	300	2
Jefferson (5)	18.81	55,154	19	3	475	443	2
Lowell	9.34	58,690	18	4	388	388	2
Madison	9.64	58,063	21	3	487	487	2
Mill Creek	9.69	55,646	23	2	560	516	1
Monroe	9.15	69,463	22	3	505	467	3
Penny Creek	13.90	64,882	29	2	689	635	2
Silver Firs	12.02	55,839	20	4	472	436	2
Silver Lake	11.09	56,774	21		477	423	4
View Ridge	9.47	66,154	25	2	600	560	2
Whittier	5.20	54,084	19	1	450	418	2
Woodside	10.84	54,055	22		497	447	1
<b>Totals:</b>	<b>176.50</b>	<b>1,000,474</b>	<b>362</b>	<b>38</b>	<b>8,410</b>	<b>7,934</b>	<b>39</b>
<b>Middle Schools</b>							
Eisenhower	19.67	107,252	31	6	856	856	1
Evergreen	21.74	116,526	38	7	1,029	1,029	1
Gateway	43.70	110,181	38	3	970	970	
Heatherwood	29.21	117,051	33	3	835	835	1
North	10.66	101,770	40	6	1,055	1,055	
<b>Totals:</b>	<b>124.98</b>	<b>552,780</b>	<b>180</b>	<b>25</b>	<b>4,745</b>	<b>4,745</b>	<b>3</b>
<b>High Schools</b>							
Cascade	38.85	244,345	69	8	1,795	1,795	3
Everett	11.12	280,459	73	10	1,930	1,930	2
Jackson	42.79	247,043	67	9	1,759	1,759	3
Sequoia (6)	3.02	67,007	14	1	360	360	1
<b>Totals:</b>	<b>95.78</b>	<b>838,854</b>	<b>223</b>	<b>28</b>	<b>5,844</b>	<b>5,844</b>	<b>9</b>
	397.26	2,392,108					

**Notes:**

- (1) Building areas do not include covered play areas
- (2) Permanent Student Capacity figures are based on Educational Program Standards - Section 3 and are exclusive of portables
- (3) The change in capacity from 2017 to 2018 is the result of the district's implementation of K-3 class size reduction
- (4) Programs not generating capacity: computer labs, specialists (reading, art, science, etc.), elementary music, ECEAP, LAP, developmental pre-school, and elementary resource rooms
- (5) Jefferson Elementary School's acreage excludes adjacent undeveloped site of 9.81 acres
- (6) Sequoia High School's acreage excludes two nearby sites - playfield at 36th Street and Norton Avenue - 2.96 acres and Doyle Park at 35th Street and Grand Avenue - 1.38 acres

**Table 2**  
**Portable Capacity Inventory**

School Name	Teaching Stations General Education	Teaching Stations Special Education	2017 Portable Student Capacity (1)	Teaching Stations Not Generating Capacity (3)	Teaching Stations General Education	Teaching Stations Special Education	2018 Portable Student Capacity (2)	Teaching Stations Not Generating Capacity (3)
<b>Elementary Schools</b>								
Cedar Wood	10		238		12		282	
Emerson	6		141	2	7		165	2
Forest View	8		188		10		228	
Garfield								
Hawthorne				1				1
Jackson	3		72		3		72	
Jefferson	4		92		4		84	
Lowell	4		90	2	5		114	2
Madison								
Mill Creek	5		119		6		141	
Monroe	2		72		3		72	
Penny Creek	4		96		4		96	
Silver Firs	1		24		1		24	
Silver Lake	9		264	2	12		312	2
View Ridge					2		48	
Whittier	2		47		3		69	
Woodside	10		239		10		237	
<b>Totals:</b>	<b>68</b>	<b>0</b>	<b>1,682</b>	<b>7</b>	<b>82</b>	<b>0</b>	<b>1,944</b>	<b>7</b>
<b>Middle Schools</b>								
Eisenhower	5	1	138		5	1	162	
Evergreen	6		132		6		132	
Gateway							0	2
Heatherwood	10		216		10		216	
North	1		0		1		0	
<b>Totals:</b>	<b>22</b>	<b>1</b>	<b>486</b>	<b>0</b>	<b>22</b>	<b>1</b>	<b>510</b>	<b>2</b>
<b>High Schools</b>								
Cascade		1	15	1		1	15	1
Everett			0				0	
Jackson	17		408		17		408	
Sequoia			0				0	
<b>Totals:</b>	<b>17</b>	<b>1</b>	<b>423</b>	<b>1</b>	<b>17</b>	<b>1</b>	<b>423</b>	<b>1</b>

**Notes:**

- (1) Portable Student Capacity figures are based on Educational Program Standards - Section 3
- (2) The change in capacity from 2017 to 2018 is the result of the district's implementation of K-3 class size reduction and the addition of portable classrooms
- (3) Programs not generating capacity: computer labs, specialists (reading, art, science, etc.), elementary music, ECEAP, LAP, developmental pre-school, and elementary resource rooms

**Table 3**  
**Support Facility Inventory**

<b>Support Facility</b>	<b>Site Size (acres)</b>	<b>Building Area (Sq. Ft.)</b>
Maintenance Facility	1.5	29,080
Vehicle Repair Building	-	7,851
Maintenance Storage Building	0.4	10,594
North Satellite Bus & Storage Facility	2.42	12,600
Central Bus Facility	5.25	24,102
Community Resource Center <sup>(1)</sup>	3.6	68,531
Longfellow Building & Annex	2.34	32,200
Lively Environmental Center	19.45	3,885
Memorial Stadium	22.79	-
Athletics Building	-	11,925
FB Press Box	-	1,602
Baseball Facility	-	7,625
Batting Cage/Storage	-	2,800
Other Buildings	-	5,639
<b>Totals:</b>	<b>57.75</b>	<b>218,434</b>

**Note:**

1. Building area does not include unheated garage space (18,409 sq. ft.)

## ***Section 5***

### ***Student Enrollment***

## **SECTION 5: STUDENT ENROLLMENT**

### **Historical and Current Enrollment Trends**

Between 1973 and 1983, student enrollment in the Everett School District was relatively constant. Beginning in 1983, due to a healthy local economy and an active housing market, student enrollment showed a steady increase through 2001. Fueled by historically low interest rates and another active housing market in the Mill Creek East UGA Plan area, district enrollment rose again from 2005 to 2009. Beginning in 2010 the district's enrollment declined through 2012. In 2013 the enrollment rebounded and has increase each year since. Enrollment is projected to continue to increase, each year, through 2023. Enrollment projections from 2023 to 2035 are linked directly to OFM population forecasts, and show a steady increase as well.

### **2018-2023 Enrollment Projections**

This CFP has been prepared using OSPI enrollment projections for 2018 through 2023. This enrollment projection method was chosen, in part, because it uses an historical cohort-survival analysis that has historically produced relatively accurate results. This method tracks enrollment each year at each grade span as students move through the K-12 system and projects enrollment based on actual enrollment changes over the previous six years. The OSPI methodology is described in more detail in Appendix C. OSPI enrollment projections are presented in Tables 4, 5, and 6. Please note that all enrollment figures shown in this CFP are FTE as of October 1 of the year indicated.

For comparison purposes, Table 5 also contains enrollment forecasts from one other source besides OSPI. A grade progression (cohort survival analysis) projection prepared by W. Les Kendrick of Educational Data Solutions, Kendrick's methodology is described in more detail in Appendix E.

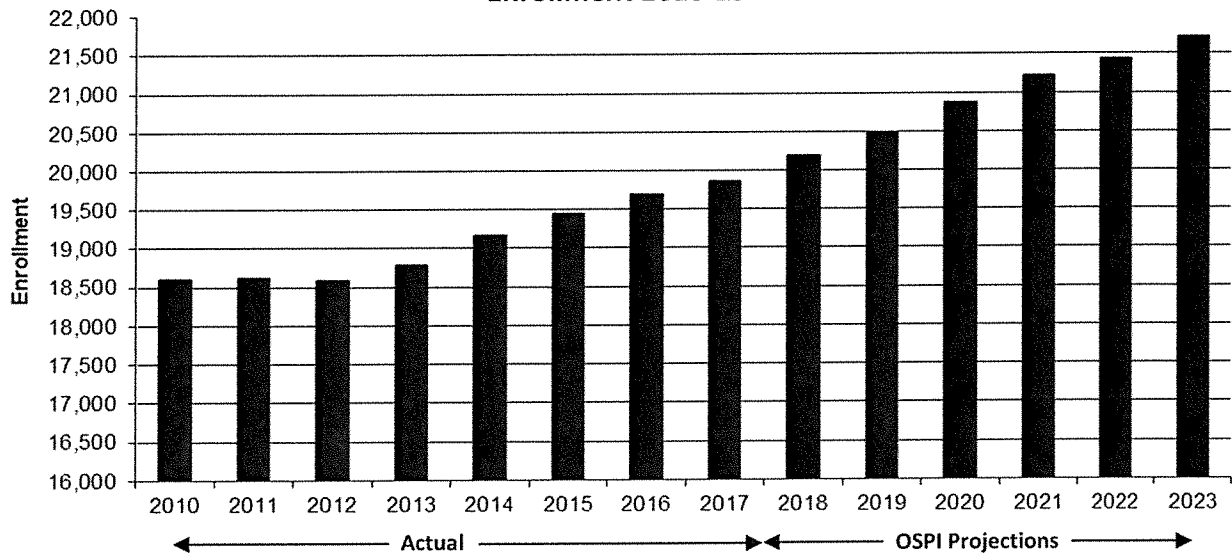
Based on the OSPI enrollment projections, overall District enrollment will increase by 1,864 students over the next six years, reflecting an increase of approximately 9.39% over the 2017 enrollment levels. Table 6 provides a breakdown of the OSPI enrollment projections by grade level span for every year from 2017 to 2023.

### **2035 Enrollment Projections**

Long-range enrollment projections are, by their nature, much more speculative than short-range projections. Nevertheless, they are useful in developing comprehensive plans for future facilities and sites. Neither OSPI nor Kendrick produce projections out past 2023. Therefore, enrollment projections for 2035, eighteen years out, are presented in Table 7 using just the OFM Ratio Method.

The OFM projections for 2035 indicate that total enrollment in the District will increase by 3,457 students to 23,311 FTE, an increase of 17.41% over the 2017 enrollment levels. Enrollment in 2035 is projected to be higher than the 2017 capacities at all levels. An analysis of future capacities and facilities needs is provided in Section 6.

**Table 4**  
**Enrollment 2010-23**



**Table 5**  
**Comparison of Enrollment Projections 2018-23**

	<i>Actual</i>							Projected Total Change	Projected Percent Change
	2017	2018	2019	2020	2021	2022	2023	2017-23	2017-23
OSPI	19,854	20,183	20,493	20,867	21,220	21,439	21,718	1,864	9.39%
Kendrick	19,854	20,088	20,286	20,204	20,923	21,077	21,290	1,436	7.23%

**Table 6**  
**OSPI Actual Enrollment 2017 & OSPI Projections 2018-23**

	<i>Actual</i>							Projected Total Change	Projected Percent Change
	2017	2018	2019	2020	2021	2022	2023	2017-23	2017-23
Elementary	9,736	9,821	9,845	9,883	10,086	10,216	10,267	531	5.45%
Middle	4,659	4,737	4,936	5,031	4,958	4,898	4,931	272	5.84%
High	5,459	5,625	5,712	5,953	6,176	6,325	6,520	1,061	19.44%
Total:	19,854	20,183	20,493	20,867	21,220	21,439	21,718	1,864	9.39%

**Table 7**  
**OFM Ratio Enrollment Projections 2035**

	2035
Elementary School	11,020
Middle School	5,293
High School	6,998
Total:	23,311

**Table 8**  
**Permanent Facility Capacity Calculations 2017-2035**

<b>Elementary School</b>	<b>2017</b>	<b>2018</b>	<b>2019</b>	<b>2020</b>	<b>2021</b>	<b>2022</b>	<b>2023</b>	<b>2035</b>
Enrollment	9,736	9,821	9,845	9,883	10,086	10,216	10,267	11,020
Capacity Change Due to Construction Projects		0	619	0	0	0	0	2,464
Total Capacity <sup>1,2</sup> (after construction projects)	8,410	7,934	8,553	8,553	8,553	8,553	8,553	11,017
Amount of Enrollment Above or (Below) Capacity	1,326	1,887	1,292	1,330	1,533	1,663	1,714	3

**2018-23 Elementary School Expansion Ratio \* 531 / 619 = 85.78%**

Notes:

1) 2018 - The change in capacity is due to an implementation of K-3 class size reductions.

<b>Middle School</b>	<b>2017</b>	<b>2018</b>	<b>2019</b>	<b>2020</b>	<b>2021</b>	<b>2022</b>	<b>2023</b>	<b>2035</b>
Enrollment	4,656	4,737	4,936	5,031	4,958	4,898	4,931	5,293
Capacity Change Due to Construction Projects		0	-230 <sup>1</sup>		0	0	0	768
Total Capacity (after construction projects)	4,745	4,745	4,515	4,515	4,515	4,515	4,515	5,283
Amount of Enrollment Above or (Below) Capacity	-89	-8	421	516	443	383	416	10

**2018-23 Middle School Expansion Ratio \* 286 / 0 = 0.00% (no new construction is planned)**

Notes:

1) 2019 - The change in capacity is due to a campus modernization at North Middle School. As part of the modernization, the classroom buildings are being replaced. The new building will contain larger classrooms, but there will be a fewer number of classrooms.

<b>High School</b>	<b>2017</b>	<b>2018</b>	<b>2019</b>	<b>2020</b>	<b>2021</b>	<b>2022</b>	<b>2023</b>	<b>2035</b>
Enrollment	5,459	5,625	5,712	5,953	6,176	6,325	6,520	6,998
Capacity Change Due to Construction Projects		0	0	0	0	0	1,500	0
Total Capacity (after construction projects)	5,844	5,844	5,844	5,844	5,844	5,844	7,344	7,344
Amount of Enrollment Above or (Below) Capacity	-385	-219	-132	109	332	481	-824	-346

**2018-23 High School Expansion Ratio \* 676 / 1,500 = 45.07%**

\* Ratio between the needed capacity for growth divided by the capacity increase due to proposed construction projects

((Highest enrollment from 2018 to 2023) minus (2017 Capacity) minus (existing deficiencies)) divided by (Sum of capacity increases due to construction projects)



## ***Section 6***

### ***Capital Facilities Plan***

## **SECTION 6: CAPITAL FACILITIES PLAN**

### **Facilities Needs 2018-23**

#### **Elementary School**

Currently, there are existing capacity deficiencies at the elementary school level. As of 2017, the district elementary enrollment was 1,326 students over the permanent building capacity. These students are currently housed in seventy-five (75) portable classrooms. Fourteen of the district's seventeen elementary schools are currently over their permanent building capacity. By 2023, the district is projected to grow by an additional 531. The plan is to address these needs is through the construction of additional schools. The plan, as detailed in the CFP, is to construct a new elementary with a capacity of 619.

#### **Middle School**

At a district wide level, the middle schools not indicate existing capacity deficiencies. However, three of the district's five middle schools are over the permanent building capacity. The middle school enrollment is projected to continue to grow through 2023. At that time, the enrollment at all five of the district's middle schools are projected to be over the permanent building capacity. The plan is to address these needs is through the purchase and placement of portables at the effected schools. The plan, as detailed in the CFP, is not to construct any new space.

#### **High School**

District wide, the high schools do not indicate existing capacity deficiencies. Nonetheless, one of the district's three high schools is currently 378 students over the permanent building capacity. By 2023, the high school enrollment is projected to grow by an additional 1,061 students. At that point, two of the district's three high schools are projected to be over the permanent building capacity. The plan to address part of these needs, between 2018 and 2023, is through the purchase and placement of portables at the affected schools. The plan, as detailed in the CFP, is to construct new comprehensive high school no. 4 with a capacity of 1,500 students.

#### **District-wide**

##### Enrollment

The District-wide enrollment is projected to gradually increase each year from 2017 to 2023. During this same time period the anticipated enrollment levels will also exceed the 2017 capacities at the elementary, middle, and high school levels. This increase is manifested throughout the district, although the majority of the growth in the southern portion of the district. Enrollment and capacity projections are presented together for comparison purposes in Table 8 – *Permanent Facility Capacity Calculations 2017-2035*.

##### Land

Most of the recent growth in our student population has been, and is anticipated to continue to be, in the southern part of the district. Most of the developable land within the urban areas in that part of the district has already been developed. This trend could increase the need for school facilities in this area beyond those described below.

State law, Vision 2040, and the Snohomish County Code each address school facilities planning. To help plan for anticipated growth in student enrollment in the southern part of the district, the district has been searching for developable assemblages of land large enough to site another elementary school in the vicinity. However, the district is long and narrow, and the availability of undeveloped land within the southern part of Snohomish County's Urban Growth Area (UGA) is extremely limited. The district finds it would be more efficient from a student access and transportation perspective to look at sites closer to that growth outside the UGA rather than further away within the UGA. It would also be more burdensome and inequitable to displace new residents and housing stock with school facilities where other alternatives exist that require less family displacement, less housing stock demolition, and are more proximate to the students than potential school sites further north. Therefore, the district anticipates the need to look outside the UGA to locate parcels large enough to accommodate a school, where appropriate. The District is authorized to locate an elementary school outside the UGA. Under Snohomish County's zoning code, elementary schools are allowed in rural areas, although RCW 36.70A.213 imposes certain conditions on extension of public facilities and utilities to serve schools sited in rural areas. RCW 36.70A.213(1)(b) & (c)

#### Busing

Due to the impacts, difficulties, and high cost of transporting students over long distances, the district believes busing students long distances from the south end of the district to the north end is not the most appropriate method of addressing all of the expected south-end growth.

#### **Planned Improvements Adding Student Capacity**

The following is an outline of the projects that add capacity and are considered necessary to accommodate the students forecasted in OSPI enrollment projections in the district through 2023. Timelines for these projects can be found in Table 9 – *Capital Facilities Plan*.

#### Elementary Schools

District-wide elementary school enrollment is projected to reach 10,267 in 2023 as shown in Table 8, an increase of 531 students from the 2017 enrollment of 9,736. This is 1,857 more students than the existing 2017 elementary school capacity of 8,410. In response to this increase in enrollment, the district is planning:

- 1) New elementary school no. 18 - with a projected capacity of 619 needs to be constructed. The location for this school is on 180<sup>th</sup> Street SE, situated in the southeastern portion of the district. Estimate - \$45,400,000
- 2) Portable classrooms (20) will need to be relocated or purchased in order to provide sufficient classroom space at individual schools. Estimate - \$5,100,000

The estimated cost of elementary school permanent facility improvements is: \$45,400,000.

#### Middle Schools

District-wide middle school enrollment is projected to increase to its highest level of 5,031 in 2020. The existing 2017 middle school capacity of 4,745 will not be adequate to accommodate the projected enrollment. To provide for the enrollment increases at individual schools, portable classrooms (8) will be purchased or relocated to provide sufficient classroom space, while avoiding additional permanent facility construction expense. No other projects adding capacity are planned through 2021. Estimate - \$2,000,000

The estimated cost of middle school permanent facility improvements is: \$0.

### High Schools

District-wide high school enrollment is projected to increase every year between 2018 and 2023. Enrollment will reach its highest level of 6,520 in 2023. This is 676 more students than the existing 2017 high school capacity of 5,844. In response to this increase in enrollment, the district is planning:

- 1) New comprehensive high school no. 4 - with a projected capacity of 1500 needs to be constructed. The location for this school is on 180<sup>th</sup> Street SE, situated in the southeastern portion of the district. Estimate - \$218,000,000
- 2) As enrollment increases at individual school, prior to the completion of the new high school, portable classrooms (16) will need to be purchased or relocated in order to provide sufficient classroom space. Estimate - \$4,000,000

The estimated cost of high school permanent facility improvements is: \$218,000,000

### Future School Site Property – 180<sup>th</sup> Street SE

In 2007 the district purchased property on 180<sup>th</sup> St. SE as a future site for two schools. As part of the purchase and sale agreement the district issued, to the developer, the equivalent of \$4,660,000 worth of Mitigation Fee Credits toward future impact fees. The developer can use the certificates in lieu of paying impact fees. This practice will continue until the retirement of current credit balance of \$1,498,997.

### Property Purchases

To accommodate future growth and the facilities needs of the district, the district plans to acquire additional property in the southeastern portion of the district in the vicinity of Strumme Road for a future elementary school. In accordance with applicable state, regional, and county planning policies, the district finds that this property is an appropriate location for a future elementary school, given the anticipated student enrollment area and growth, and the limited availability of suitable land in south Snohomish County to equitably meet the anticipated student demand. The district also plans to acquire properties along Broadway near the Community Resource Center to allow additional multi-use facilities at the School District's community resource and sports assemblage.

The cost to purchase these properties is estimated at: \$9,000,000.

### **Planned Improvements Not Adding Student Capacity**

The following is an outline of the projects that do not add capacity, but are considered necessary to accommodate and support the educational program in the district through 2023. Timelines for these projects can be found in Table 9 – *Capital Facilities Plan*.

### Elementary Schools

- Woodside Elementary School modernization & partial replacement
- The cost of this improvement is estimated at: \$27,8000,000

### Middle Schools

- North Middle School modernization & partial replacement
- The cost of this improvement is estimated at: \$50,100,000

### High Schools

- Everett High School Lincoln Field synthetic turf replacement
- Everett High School Main building exterior finish preservation and restoration

- The cost of these improvements is estimated at: \$2,400,000

#### Safety and Security Projects

- Upgrades to building access and controls, security vestibules, and site security
- The cost of these improvements is estimated at: \$8,500,000.

#### 1:1 Computers for Students – High School, Middle School, & Elementary School

- WI-FI mobile devices, related infrastructure, support, training, professional development
- The cost of these improvements is estimated at: \$21,456,000.

#### Technology Infrastructure & Upgrades

- WIFI, security cameras, network/data security, data center systems, fiber optic WAN
- Telephone system hardware and software upgrades and enhancements
- The cost of these improvements is estimated at: \$39,333,000.

#### Other School Projects

- District-wide upgrades to heating, ventilation and air conditioning systems, exterior and interior finishes, roofing, and other miscellaneous systems upgrades.
- The cost of these improvements is estimated at: \$10,808,000.

#### Other Projects

- Science Resource Center Relocation
- Memorial baseball stadium upgrades
- South satellite bus facility
- The cost of these improvements is estimated at: \$3,500,000

### **Facilities Needs 2023-2035**

#### **Planned Improvements**

In order to house the district wide projected enrollments (OFM) from 2023 through 2035, the district would need to construct new schools and/or classroom additions at various school sites throughout the district. To prepare for this and future growth the district will need to acquire additional sites for new schools as well as property along Broadway near the Community Resource Center to add additional multi-use facilities to the district's community resource center and sports assemblage.

To accommodate the enrollment from 2023-2035 the district anticipates the need for the following facilities:

- Elementary school level
  - 112 classrooms / 2,464 capacity
    - *Equivalent to four new schools; or three new schools and additions to existing schools*
- Middle school level
  - 32 classrooms / 768 capacity
    - *Equivalent to approximately one new school*
- High school level
  - The construction and opening of a high school (1,500 capacity) in 2023 or 2024 will accommodate all projected growth through 2035.

**Table 9  
Capital Facilities Plan**

	Estimated Project Cost by Year - in \$ Millions						Total Cost	Secured Bond/Levy <sup>1</sup>	Secured Other <sup>2</sup>	Unsecured Other <sup>3</sup>
	2018	2019	2020	2021	2022	2023				
Improvements Adding Student Capacity										
Elementary School										
New Elementary #18	\$23.245	\$21.481	\$0.674				\$45.400			
Portable Relocations / Purchase <sup>4</sup>	\$2.600	\$0.500	\$0.500	\$0.500	\$0.500	\$0.500	\$5.100	\$0.550	\$1.000	\$3.550
Middle School										
Portable Relocations / Purchase <sup>4</sup>	\$0.250	\$0.250	\$0.500	\$0.250	\$0.250	\$0.500	\$2.000	\$0.550	\$0.200	\$1.250
High School										
New Comprehensive High School #4			\$3.500	\$54.775	\$95.835	\$63.890	\$218.000			\$218.000
Portable Relocations / Purchase <sup>4</sup>		\$0.500	\$1.250	\$1.250	\$1.000		\$4.000	\$2.400	\$0.200	\$1.400
Subtotal	\$26.095	\$22.731	\$6.424	\$56.775	\$97.585	\$64.890	\$274.500	\$48.900	\$1.400	\$224.200
Property Adding Student Capacity										
180th Street SE Site <sup>4</sup>	\$0.300	\$0.300	\$0.300	\$0.300	\$0.300	\$0.300	\$1.800		\$1.800	
Purchase property on 174th St. SE adjacent to 180th St. SE Site <sup>4</sup>	\$2.584						\$2.584		\$2.584	
Purchase property for future elementary school	\$0.250	\$4.250					\$4.500	\$4.500		
Subtotal	\$3.134	\$4.550	\$0.300	\$0.300	\$0.300	\$0.300	\$8.884	\$4.500	\$4.384	
Improvements Not Adding Student Capacity										
Woodside ES modernization + partial replacement	\$1.070	\$10.200	\$15.930	\$0.600			\$27.800	\$27.800		
North MS modernization + partial replacement	\$17.500	\$26.000	\$6.600				\$50.100	\$50.100		
Safety and security upgrades	\$3.500	\$3.500	\$1.500				\$8.500	\$8.500		
1:1 Computers for students	\$3.898	\$5.349	\$4.000	\$5.400	\$2.809		\$21.456	\$21.456		
Everett HS Lincoln Field synthetic turf replacement	\$1.500						\$1.500	\$1.500		
Memorial baseball stadium upgrades	\$1.750						\$1.750		\$1.750	
Everett HS - Main building exterior finish preserve & restore	\$0.025	\$0.875					\$0.900	\$0.900		
Science Resource Center Relocation	\$0.150						\$0.150		\$0.150	
South satellite bus facility					\$0.800	\$0.800	\$1.600			\$1.600
Upgrade HVAC/exterior and interior finishes/floor systems	\$3.010	\$3.085	\$3.069	\$1.644			\$10.808	\$10.808		
District-wide technology infrastructure & upgrades	\$14.235	\$6.580	\$6.668	\$7.848	\$3.792	\$0.210	\$39.333	\$39.333		
Subtotal	\$46.638	\$55.589	\$37.767	\$15.492	\$7.401	\$1.010	\$163.897	\$160.397	\$1.900	\$1.600
Total	\$75.867	\$82.870	\$44.491	\$72.567	\$105.286	\$66.200	\$447.281	\$213.797	\$7.684	\$225.800

Source: Everett School District

1. Secured Bond/Levy - bond and levy funding already approved by voters
2. Secured Other - funds currently available to the District including proceeds from property sales, school mitigation and impact fees, state funding assistance from prior construction projects, and impact/mitigation fee credits from the 2007 purchase of the 30-acre property on 180th Street SE
3. Unsecured future - school mitigation and impact fees not yet collected, bonds and levies not yet approved, grants, donations, and other miscellaneous sources
4. Costs are not included in the calculations of the impact fees

## **CAPITAL FACILITIES FINANCING PLAN**

### **Six Year Finance Plan**

The *Capital Facilities Plan* (Table 9) demonstrates how the Everett School District intends to fund new construction and improvements to school facilities for the years 2018 through 2023. The financing components include: 1) secured funding from capital projects bonds and levies; 2) secured funding from other sources - property sales, school mitigation and impact fees, state funding assistance from prior construction projects, and mitigation fee credits from the 2007 purchase of the 30-acre property on 180th St SE; and 3) unsecured future funding sources - school mitigation and impact fees not yet collected, bonds and levies not yet approved. The financing plan also separates projects and portions of projects which add permanent building capacity from those which do not.

### **Funding for the Plan**

#### 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 sold and then retired through collection of property taxes. The Everett School District passed capital improvements bonds for \$96.5 million in 1990, \$68.5 million in 1996, \$74.0 million in 2002, and \$198.9 million in 2006. Many major projects have been financed by these bonds. Most recently, in April 2016, the voters of the district approved a \$149.7 million capital bond.

#### Capital Levies

In April 2016, the voters of the district passed a \$89.6 million levy replacement Capital Levy for Safety, Building, and Instructional Technology Improvements. Prior to that, voters in the Everett School District passed a Building Repair and Technology levy in 2010 authorizing the district to collect \$48 million from property taxes over six years, through 2016, for capital improvements to facilities and technology.

#### School Construction Assistance

State funding assistance comes from the Common School Construction Fund (28A.515 RCW). Bonds are sold on behalf of the fund then retired from revenues accruing predominantly 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 funding assistance for a specific capital project. To qualify, a project must first meet a state-established criterion of need. This is determined through a formula which 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 statewide based on seven prioritization categories. Funds are then disbursed to the 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. The 2017 state funding assistance percentages, for recognized project costs, range from a minimum of 20% to a maximum of 96.35%. The current state funding assistance percentage assigned to the district is 56.02%.

State funding assistance can be applied only to major school construction projects. Site acquisition and minor improvements are not eligible to receive funding assistance from the state. Because availability of state funding assistance has not kept pace with the rapid enrollment growth occurring in many of Washington's school districts, sometimes funding assistance from the state is not 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 complete project with local funds. Sometimes borrowing funds allocated to future projects, until the state distributes their funding assistance. When the state funding assistance is received the future project's accounts are reimbursed.

Currently, the state has determined that the Everett School District has excess student capacity, and, therefore, is not currently eligible for state funding assistance on projects that provide increased student capacity. The district remains eligible for state funding assistance for modernization projects.

#### School Impact Fees

Impact fees, assessed on new development, have been adopted by a number of jurisdictions as a means of supplementing traditional funding sources for the construction of public facilities needed to accommodate the population growth attributed to the new development. School impact fees are generally collected by the permitting agency at the time issuance of building permits or, in a limited number of instances, the issuance of certificates of occupancy. The district's impact fees are calculated on worksheets contained in Appendix A and are summarized in Table 11.

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 portables. Credits have also been applied in the formula to account for state funding assistance 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 only address existing deficiencies have been eliminated from the variables used in the calculations as indicated in Table 12 – *Impact Fee Variables*.

#### Exclusion of Costs to Correct Existing Deficiencies

##### 2018-2023 Costs

By ordinance, new developments cannot be assessed impact fees to correct existing deficiencies. For this CFP update, the base year for determining existing deficiencies is 2017. Thus, capacity deficiencies existing in 2017 must be deducted from the total projected deficiencies in the calculation of impact fees. This is accomplished in Table 8 – *Permanent Facility Capacity Calculations 2017-3035* for school construction costs by calculating a 2017-2023 Expansion Ratio percentage of new students to new capacity for each grade span. This Expansion Ratio is then used to modify (reduce) certain variables included in the calculation of the School Construction Cost Element and Site Acquisition Cost Element. These figures are shown on lines labeled "Growth Related (2018-2023)" in Table 12.

Example: The total cost of a new elementary schools is estimated at \$45,400,000. This is multiplied by the Elementary Expansion Ratio of 85.78%, to obtain the Growth Related (2018-2023) school construction cost of \$38,945,719. This modified (reduced) cost is used in the impact fee calculations.



School Construction Included in the Calculation of Impact Fees

The calculations of school impact fees in this CFP include the following school construction projects which address future growth-related needs of the district.

Elementary school level

- |                                |                     |
|--------------------------------|---------------------|
| • New Elementary School No. 18 | <u>\$45,400,000</u> |
| Total:                         | \$45,400,000        |

High school level

- |                                       |                      |
|---------------------------------------|----------------------|
| • New Comprehensive High School No. 4 | <u>\$218,000,000</u> |
| Total:                                | \$218,000,000        |

Site Acquisitions Included in the Calculation of Impact Fees

The calculations of school impact fees in this CFP include the following site acquisition which addresses future growth-related needs of the district.

Elementary school level

- |   |                    |
|---|--------------------|
| • Property for Elementary School No. 18 | <u>\$4,500,000</u> |
| Total:                                  | \$4,500,000        |

Projects **Not** Included in the Calculation of Impact Fees

The following projects do not add capacity or deal primarily with existing deficiencies and are not included in the calculation of impact fees:

- Woodside Elementary School modernization & partial replacement
- North Middle School modernization & partial replacement
- Safety and security projects
- 1:1 computers for students – equitable access to technology
- Everett High School Main building exterior finish preservation and restoration
- Everett High School Lincoln Field synthetic turf replacement
- Memorial baseball stadium upgrades
- South satellite bus facility
- Science Resource Center relocation
- District-wide technology infrastructure and upgrades
- Heating, ventilation and air conditioning systems upgrades
- Exterior and interior finishes upgrades
- Miscellaneous system upgrades
- Portable purchases and/or relocations

Property purchases **Not** Included in the Calculation of Impact Fees

- Property adjacent to the 180<sup>th</sup> Street SE site for future school facilities
- Property in the vicinity of Strumme Road for a future elementary school
- Property in the southeastern portion of the district for an additional elementary school
- Property near the Community Resource Center to add additional multi-use facilities to the District's community resource center and sports assemblage.

The proposed locations and capacities of new or expanded capital facilities are:

- New elementary school no. 18: 180th Street SE site - Capacity: 619 students
- 45 Portables - various sites - Capacity: 22 - 24 students per portable

## Calculation Criteria / Impact Fee Variables (See Table 12 – *Impact Fee Variables*)

### Site Acquisition Cost Element

Site Size: Site size gives the optimal acreage for each school type based on studies of existing school sites. Generally, districts will require 11-15 acres for an elementary school; 25-30 acres for a middle 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 (i.e. wetlands, steep slopes, etc.). It also varies based on the need for athletic fields adjacent to the school and other specific planning factors.

Average Land Cost per Acre: The cost per acre is based on estimates of land costs within the district, based on recent land purchases and 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 Everett School District has researched and evaluated potential land in the southeast area of the district. The majority of recent growth has occurred in this area of the district. The district's enrollment projections show future growth in this area as well. A lot of this area is outside of the Urban Growth Area (UGA). In order for the maximum growth to occur, the UGA will need to expand and more land will need to be included into the UGA. Currently there are no plans to expand the UGA in the near future (through 2023). Developed sites within the UGA, which sometimes must be acquired adjacent to existing school sites in order to expand these facilities, can cost substantially more. The district has recently purchased 15 acres of land in this area.

Additional Land Capacity: Land capacities reflect the district's building design capacity for new schools. These figures are based, in part, on design studies of effective floor area for new school facilities. The district design standards for new schools accommodate the following capacities: 600 students for elementary schools, 825 for middle schools, and 1,500 for high schools.

Student Factor: The student factor or student generation rate (SGR) is the average number of students generated by each housing type, whether single-family detached dwellings or multiple-family dwellings. Multiple-family dwellings in a single structure, containing two or more dwelling units, are broken out into zero-to-one bedroom units and two or more bedroom units.

Pursuant to a requirement of Chapter 30.66C SCC, each school district is required to conduct a student generation study within their jurisdiction. This is done to "localize" generation rates for purposes of calculating impact fees. A description of this methodology is contained in Appendix B.

The current student generation rates for the district are:

**Table 10**  
**Student Generation Rates**

Housing Type	K-5	6-8	9-12	K-12
Single Family	0.310	0.086	0.074	0.470
Multiple Family, 0-1 BR	.000	.000	.000	0.000
Multiple Family, 2+ BR*	0.157	0.072	0.064	0.293

\* Includes duplexes, condominiums, and townhouses

### **School Construction Cost Variables**

**Additional Building Capacity:** Building capacities reflect the district's building design capacity for new schools. These figures are based, in part, on design studies of effective floor area for new school facilities. The district design standards for new schools accommodate the following capacities: 600 students for elementary schools, 825 for middle schools, and 1,500 for high schools.

**Current Permanent Square Footage:** In the calculation of existing permanent building areas, covered play areas are not included. (Details are located on Table 1 – School Inventory)

**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 9 –*Capital Facilities Plan*, including only capacity related improvements. Projects or portions of projects that address existing deficiencies, which are those students who are un-housed as of December 31, 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 funding assistance. Off-site development costs vary, and can represent 10% or more of the total building construction cost.

### **State Funding Assistance Credit Variables**

**Construction Cost Allocation (CCA):** This number is generated by OSPI as a guide for determining the area cost allocation for new school construction. The CCA is adjusted regularly for inflation. As of July 1, 2017 the CCA been adjusted to \$225.97 per square foot.

**State Funding Assistance Percentage:** The state funding assistance 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.

If a project were eligible for state funding assistance, the district would receive basic project reimbursement on a state funding assistance ratio. However, because the state has determined that the Everett District has excess student capacity according to the state's formula, the district is not eligible for state funding assistance on new construction at this time. Therefore, the effective state funding assistance ratio is 0%. If the district was eligible to receive state funding assistance, the 2018 funding assistance ratio, according to OSPI, would be 56.02%.

### **Tax Credit Variables**

Under Chapter 30.66C SCC, a credit is granted to new development to account for property taxes which 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 3.85%.

Property Tax Levy Rate (in mils): The capital construction levy rate is determined by dividing the district's average capital property tax rate by one-thousand. The current property tax levy rate for the district is: .001836.

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 average 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 is \$392,665 for single-family detached residential dwellings; \$127,578 for one-bedroom or less multi-family units, and \$189,310 for two-or-more bedroom multi-family units.

Loan Payoff (Years): This is the average amount of time remaining on Capital Projects/General Obligation Bonds issued by the district. The average time remaining on bonds issued by all the Snohomish County school districts is assumed to be 10 years for purposes of calculating this credit.

### **Impact Fee Schedule**

**Table 11**  
**Calculated Impact Fees**  
**Everett School District**

Housing Type	Impact Fee Per Unit
Single Family	\$28,500
Multiple Family, 0-1 BR	\$0
Multiple Family, 2+ BR*	\$18,250

**School Impact Fees with 50% discount**  
**Everett School District**

Housing Type	Impact Fee Per Unit
Single Family	\$14,250
Multiple Family, 0-1 BR	\$0
Multiple Family, 2+ BR*	\$9,125

*\* Includes duplexes, condominiums, and townhomes*

**Table 12**  
**Impact Fee Variables**

Criteria	Elementary	Middle	High
<b>Site Acquisition Cost Element</b>			
Site Size (acres)	15.00	0	0
<i>Growth Related (2018-23)</i>			
Average Land Cost Per Acre	\$300,000	\$300,000	\$300,000
<i>Growth Related (2018-23)</i>	\$257,351	\$0	\$135,200
Total Land Cost	\$4,500,000	\$0	\$0
<i>Growth Related (2018-23)</i>	\$3,860,258	\$0	\$0
Additional Land Capacity	565	0	0
<i>Growth Related (2018-23)</i>	485	0	0
<b>Student Factor</b>			
Single Family	0.310	0.086	0.074
Multiple Family 0-1 Bedroom	.000	.000	.000
Multiple Family 2+ Bedrooms	0.157	0.072	0.064
<b>School Construction Cost Element</b>			
	New Elementary School No. 18		Comprehensive High School No. 4
Additional Building Capacity	619	0	1,500
<i>Growth Related (2018-23)</i>	531	0	676
Current Facility Square Footage	1,000,474	552,780	838,854
Estimated Facility Construction Cost	\$45,400,000	\$0	\$218,000,000
<i>Growth Related (2018-23)</i>	\$38,945,719	\$0	\$98,245,333
<b>State Financing Assistance Credit *</b>			
Construction Cost Allotment -- July 2017	\$225.97	\$225.97	\$225.97
School Space per Student (OSPI)	90	117	130
State Financing Assistance Percentage	56.02%	56.02%	56.02%
<b>Tax Payment Credit</b>			
Interest Rate	3.85%	3.85%	3.85%
Loan Payoff (Years)	10	10	10
Levy Rate	0.001836	0.001836	0.001836
Average Assessed Value	\$392,665 (Single Family)	\$127,578 (MF 0-1 bdrm)	\$189,310 (MF 2+ bdrm)
<b>Growth-Related Capacity Percentage</b>			
Permanent Facilities	85.78%	0.00%	45.07%
Discount	50%	50%	50%

\* The district is currently not eligible for state funding assistance on new construction.

***Appendix A***

***Impact Fee Calculations***

IMPACT FEE WORKSHEET  
EVERETT SCHOOL DISTRICT  
**SINGLE-FAMILY RESIDENTIAL**

**SITE ACQUISITION COST**

acres needed	15.00	x	cost per acre	\$257,351	/	capacity (# students)	485	x	student factor	0.310	=	\$2,469	(elementary)
acres needed	0.00	x	cost per acre	\$0	/	capacity (# students)	0	x	student factor	0.086	=	\$0	(middle school)
acres needed	0.00	x	cost per acre	\$150,222	/	capacity (# students)	0	x	student factor	0.074	=	\$0	(high school)
<b>TOTAL SITE ACQUISITION COST</b>											=	\$2,469	

**SCHOOL CONSTRUCTION COST**

total const. cost	\$38,945,719	/	capacity (# students)	531	x	student factor	0.310	=	\$22,737	(elementary)
total const. cost	\$0	/	capacity (# students)	0	x	student factor	0.086	=	\$0	(middle school)
total const. cost	\$98,245,333	/	capacity (# students)	676	x	student factor	0.074	=	\$10,755	(high school)
						Subtotal		=	\$33,492	
Total Square Feet of Permanent Space (District)	2,392,108	/ Total Square Feet of School Facilities	2,509,680					=	95.32%	
<b>TOTAL FACILITY CONSTRUCTION COST</b>								=	\$31,923	

**STATE FINANCING ASSISTANCE CREDIT**

Const. Cost Allocation	\$225.97	x	OSPI Allowance	90	x	State Financing Assistance %	0.00%	x	student factor	0.310	=	\$0	(elementary)
Const. Cost Allocation	\$225.97	x	OSPI Allowance	117	x	State Financing Assistance %	0.00%	x	student factor	0.086	=	\$0	(middle school)
Const. Cost Allocation	\$225.97	x	OSPI Allowance	130	x	State Financing Assistance %	0.00%	x	student factor	0.074	=	\$0	(high school)
<b>TOTAL STATE MATCH CREDIT</b>											=	\$0	

**TAX PAYMENT CREDIT**

[(1+ interest rate	3.85%	) ^	10	years to pay off bond	- 1]	/	[ interest rate	3.85%	x				
(1 + interest rate	3.85%	) ^	10	years to pay off bond	] x		0.001836	Property tax levy rate	x				
assessed value	\$392,665										=	\$5,891	(tax payment credit)

**IMPACT FEE CALCULATION**

SITE ACQUISITION COST	\$2,469
FACILITY CONSTRUCTION COST	\$31,923
RELOCATABLE FACILITIES COST (PORTABLES)	\$0
(LESS STATE FINANCING ASSISTANCE CREDIT)	\$0
(LESS TAX PAYMENT CREDIT)	(\$5,891)
(LESS COUNTY DISCOUNT)	(\$14,250)
(LESS ELECTIVE DISTRICT DISCOUNT)	\$0

**FINAL IMPACT FEE PER UNIT**

**\$14,250**

IMPACT FEE WORKSHEET  
EVERETT SCHOOL DISTRICT  
MULTIPLE FAMILY RESIDENTIAL -- 1 BEDROOM OR LESS

SITE ACQUISITION COST

acres needed	15.00	x	cost per acre	\$257,351	/	capacity (# students)	485	x	student factor	.000	=	\$0	(elementary)
acres needed	0.00	x	cost per acre	\$0	/	capacity (# students)	0	x	student factor	.000	=	\$0	(middle school)
acres needed	0.00	x	cost per acre	\$150,222	/	capacity (# students)	0	x	student factor	.000	=	\$0	(high school)
TOTAL SITE ACQUISITION COST											=	\$0	

SCHOOL CONSTRUCTION COST

total const. cost	\$38,945,719	/	cost per acre	\$257,351	/	capacity (# students)	485	x	student factor	.000	=	\$0	(elementary)
total const. cost	\$0	/	cost per acre	\$0	/	capacity (# students)	0	x	student factor	.000	=	\$0	(middle school)
total const. cost	\$98,245,333	/	cost per acre	\$150,222	/	capacity (# students)	676	x	student factor	.000	=	\$0	(high school)
									Subtotal		=	\$0	
Total Square Feet of Permanent Space (District)	2,392,108	/	Total Square Feet of School Facilities	2,509,680							=	95.32%	
TOTAL FACILITY CONSTRUCTION COST											=	\$0	

STATE FINANCING ASSISTANCE CREDIT

Const. Cost Allocation	\$225.97	x	OSPI Allowance	90	x	State Financing Assistance %	0.00%	x	student factor	.000	=	\$0	(elementary)
Const. Cost Allocation	\$225.97	x	OSPI Allowance	117	x	State Financing Assistance %	0.00%	x	student factor	.000	=	\$0	(middle school)
Const. Cost Allocation	\$225.97	x	OSPI Allowance	130	x	State Financing Assistance %	0.00%	x	student factor	.000	=	\$0	(high school)
TOTAL STATE MATCH CREDIT											=	\$0	

TAX PAYMENT CREDIT

[(1+ interest rate	3.85%	) ^	10	years to pay off bond	- 1]	/	[ interest rate	3.85%	x				
(1 + interest rate	3.85%	) ^	10	years to pay off bond	] x		0.001836	Property tax levy rate	x				
assessed value	\$127,578										=	\$1,914	(tax payment credit)

IMPACT FEE CALCULATION

SITE ACQUISITION COST	\$0
FACILITY CONSTRUCTION COST	\$0
RELOCATABLE FACILITIES COST (PORTABLES)	\$0
(LESS STATE FINANCING ASSISTANCE CREDIT)	\$0
(LESS TAX PAYMENT CREDIT)	(\$1,914)
(LESS COUNTY DISCOUNT)	\$0
(LESS ELECTIVE DISTRICT DISCOUNT)	\$0

FINAL IMPACT FEE PER UNIT

\$0



IMPACT FEE WORKSHEET  
 EVERETT SCHOOL DISTRICT  
**MULTIPLE FAMILY RESIDENTIAL -- 2 BEDROOM OR MORE**

**SITE ACQUISITION COST**

acres needed	15.00	x	cost per acre	\$257,351	/	capacity (# students)	485	x	student factor	0.157	=	\$1,250	(elementary)
acres needed	0.00	x	cost per acre	\$0	/	capacity (# students)	0	x	student factor	0.072	=	\$0	(middle school)
acres needed	0.00	x	cost per acre	\$150,222	/	capacity (# students)	0	x	student factor	0.064	=	\$0	(high school)
<b>TOTAL SITE ACQUISITION COST</b>											=	\$1,250	

**SCHOOL CONSTRUCTION COST**

total const. cost	\$38,945,719	/	capacity (# students)	531	x	student factor	0.157	=	\$11,515	(elementary)
total const. cost	\$0	/	capacity (# students)	0	x	student factor	0.072	=	\$0	(middle school)
total const. cost	\$98,245,333	/	capacity (# students)	676	x	student factor	0.064	=	\$9,301	(high school)
						Subtotal			\$20,816	
Total Square Feet of Permanent Space (District)	2,392,108	/ Total Square Feet of School Facilities	2,509,680						95.32%	
<b>TOTAL FACILITY CONSTRUCTION COST</b>									\$19,841	

**STATE FINANCING ASSISTANCE CREDIT**

Const. Cost Allocation	\$225.97	x OSPI Allowance	90	x	State Financing Assistance %	0.00%	x	student factor	0.157	=	\$0	(elementary)
Const. Cost Allocation	\$225.97	x OSPI Allowance	117	x	State Financing Assistance %	0.00%	x	student factor	0.072	=	\$0	(middle school)
Const. Cost Allocation	\$225.97	x OSPI Allowance	130	x	State Financing Assistance %	0.00%	x	student factor	0.064	=	\$0	(high school)
<b>TOTAL STATE MATCH CREDIT</b>									\$0			

**TAX PAYMENT CREDIT**

[(1+ interest rate	3.85%	) ^	10	years to pay off bond	- 1]	/	[ interest rate	3.85%	x			
(1 + interest rate	3.85%	) ^	10	years to pay off bond	] x		0.001836	Property tax levy rate	x			
assessed value	\$189,310									=	\$2,840	(tax payment credit)

**IMPACT FEE CALCULATION**

SITE ACQUISITION COST	\$1,250
FACILITY CONSTRUCTION COST	\$19,841
RELOCATABLE FACILITIES COST (PORTABLES)	\$0
(LESS STATE FINANCING ASSISTANCE CREDIT)	\$0
(LESS TAX PAYMENT CREDIT)	(\$2,840)
(LESS COUNTY DISCOUNT)	(\$9,125)
(LESS ELECTIVE DISTRICT DISCOUNT)	\$0

<b>FINAL IMPACT FEE PER UNIT</b>	<b>\$9,125</b>
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***Appendix B***

***Student Generation Rate Study***



DOYLE  
CONSULTING

ENABLING SCHOOL DISTRICTS TO MANAGE AND USE STUDENT ASSESSMENT DATA

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## **Student Generation Rate Study for the Everett School District**

4/18/2018

This document describes the methodology used to calculate student generation rates (SGRs) for the Everett 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 Everett School District from January 2010 through December 2016. 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 Everett School District as of April 2018. Before proceeding, this data was reformatted and abbreviations were modified as required to provide consistency with the County Assessor's data.

3. **Single Family Rates:** The data on all new single family detached residential units in County Assessor's data were compared with the District's student record data, and the number of students at each grade level living in those units was determined. The records of 2,361 single family detached units were compared with data on 19,976 students registered in the District, and the following matches were found by grade level(s)\*:

GRADE(S)	COUNT OF MATCHES	CALCULATED RATE
K	175	0.074
1	142	0.060
2	116	0.049
3	103	0.044
4	103	0.044
5	93	0.039
6	69	0.029
7	67	0.028
8	67	0.028
9	42	0.018
10	51	0.022
11	41	0.017
12	40	0.017
K-5	732	0.310
6-8	203	0.086
9-12	174	0.074
K-12	1109	0.470

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. If specific addresses or unit numbers of 0-1 bedroom units were not provided by building management, the assumption of matches being 2+ bedroom units was made. This assumption is supported by previous SGR studies.

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

5. **Multi-Family 2+ BR Rates:** The multi-family 2+ BR SGR's were calculated by comparing data on 2+ BR multi-family units with the District's student record data, and the number of students at each grade level living in those units was determined. The records of 1,035 multi-family 2+ BR units were compared with data on 19,976 students registered in the District, and the following matches were found by grade level(s)\*:

GRADE(S)	COUNT OF MATCHES	CALCULATED RATE
K	18	0.023
1	24	0.026
2	15	0.021
3	31	0.029
4	23	0.028
5	26	0.029
6	32	0.023
7	14	0.028
8	21	0.021
9	21	0.018
10	19	0.015
11	17	0.014
12	14	0.016
K-5	162	0.157
6-8	75	0.072
9-12	66	0.064
K-12	303	0.293

6. **Multi-Family 0-1 BR Rates:** Research indicated that 463 multi-family 0-1 BR units were constructed within District boundaries during the time period covered by this study. These units were compared with the data on 19,976 students registered in the District. No specific unit number matches were made.

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

	K-5	6-8	9-12	K-12
Single Family	.310	.086	.074	.470
Multi-Family 2+ BR	.157	.072	.064	.293

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

***Appendix C***

***OSPI Enrollment Projection Methodology***

## OSPI Enrollment Projection Methodology

### 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, P-223.
2. In order to arrive at enrollment projections for kindergarten and/or grade 1 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 "Avg. % of Survival", and apply such average percentage in projecting kindergarten and/or grade one enrollments for the next six years.
3. For grade 2 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 1 on October 1, 2010, and 80 pupils in actual enrollment in grade 2 on October 1, 2011, the percent of survival would be  $80/75$ , or 106.7%. If the actual enrollment on October 1, 2012 in grade 3 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, "Avg. % of Survival".

In order to determine six-year enrollment projections for grade 2 and above, multiply the enrollment in the next lower grade during the preceding year by the average percent of survival. For example, if, on October 1 of the last year of record, there were 100 students in grade 1 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 2 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.

*Note: The district does not use OSPI's Projection of Enrollment Data / Determining Survival Rate chart shown on page C-2. Instead, the district has developed its own spreadsheets to show the same data. The projected student enrollment and grade progression percentages, for 2018-2023, are shown in the table on page C-3. The actual student enrollment and survival rate / grade progression percentages, for 2007 – 2017, are shown in the table on page C- 4.*

State of Washington  
STATE BOARD OF EDUCATION  
Olympia  
OSPI

**PROJECTION OF ENROLLMENT DATA**

School District: \_\_\_\_\_ No.: \_\_\_\_\_ County: \_\_\_\_\_

**DETERMINING SURVIVAL RATE**

	Actual Enrollment (October 1st)								Projected Enrollment						
	20__	20__	20__	20__	20__	20__	20__	Ave. % of Survival	20__	20__	20__	20__	20__	20__	20__
Kindergarten															
Grade 1															
Grade 2															
Grade 3															
Grade 4															
Grade 5															
Grade 6															
Grade 7															
Grade 8															
Grade 9															
Grade 10															
Grade 11															
Grade 12															
Totals															
1 - 6															
1 - 8															
7 - 9															
10 - 12															
9 - 12															
Hcpd.															
Grand Total Incl. Ktgn.															

*We, the undersigned authorized representatives of the aforesaid school district, hereby certify that the information submitted herewith is, to the best of our knowledge and belief, correct and complete.*

Date \_\_\_\_\_

Signed \_\_\_\_\_  
Chairman of the Board

Date \_\_\_\_\_

Signed \_\_\_\_\_  
Superintendent of Schools



**OSPI PROJECTED STUDENT ENROLLMENT 2018-2023**

School Type	Grade Level	School Year & Grade Progression Percentage												AVG
		2018	GP%	2019	GP%	2020	GP%	2021	GP%	2022	GP%	2023	GP%	GP%
Elementary	K	1,599	--	1,614	--	1,628	--	1,643	--	1,657	--	1,672	--	--
	1	1,691	104.2%	1,666	104.2%	1,681	104.2%	1,696	104.2%	1,712	104.2%	1,726	104.2%	104.2%
	2	1,610	100.9%	1,705	100.8%	1,680	100.8%	1,695	100.8%	1,710	100.8%	1,727	100.9%	100.8%
	3	1,534	100.7%	1,621	100.7%	1,716	100.6%	1,691	100.7%	1,706	100.6%	1,721	100.6%	100.7%
	4	1,692	100.6%	1,543	100.6%	1,631	100.6%	1,726	100.6%	1,701	100.6%	1,716	100.6%	100.6%
	5	1,695	100.2%	1,696	100.2%	1,547	100.3%	1,635	100.2%	1,730	100.2%	1,705	100.2%	100.2%
Middle	6	1,617	99.8%	1,692	99.8%	1,693	99.8%	1,544	99.8%	1,632	99.8%	1,727	99.8%	99.8%
	7	1,608	100.6%	1,627	100.6%	1,702	100.6%	1,703	100.6%	1,554	100.6%	1,642	100.6%	100.6%
	8	1,512	100.5%	1,617	100.6%	1,636	100.6%	1,711	100.5%	1,712	100.5%	1,562	100.5%	100.5%
High	9	1,573	101.0%	1,527	101.0%	1,633	101.0%	1,652	101.0%	1,728	101.0%	1,729	101.0%	101.0%
	10	1,411	99.0%	1,557	99.0%	1,512	99.0%	1,617	99.0%	1,635	99.0%	1,711	99.0%	99.0%
	11	1,275	93.3%	1,317	93.3%	1,454	93.4%	1,412	93.4%	1,510	93.4%	1,527	93.4%	93.4%
	12	1,366	102.9%	1,311	102.8%	1,354	102.8%	1,495	102.8%	1,452	102.8%	1,553	102.8%	102.8%
			Growth%		Growth%		Growth%		Growth%		Growth%		Growth%	AVG%
Elementary		9,821	100.9%	9,845	100.2%	9,883	100.4%	10,086	102.1%	10,216	101.3%	10,267	100.5%	100.9%
Middle School		4,737	101.7%	4,936	104.2%	5,031	101.9%	4,958	98.5%	4,898	98.8%	4,931	100.7%	101.0%
High School		5,625	103.0%	5,712	101.5%	5,953	104.2%	6,176	103.7%	6,325	102.4%	6,520	103.1%	103.0%
<b>TOTAL:</b>		<b>20,183</b>	<b>101.7%</b>	<b>20,493</b>	<b>101.5%</b>	<b>20,867</b>	<b>101.8%</b>	<b>21,220</b>	<b>101.7%</b>	<b>21,439</b>	<b>101.0%</b>	<b>21,718</b>	<b>101.3%</b>	<b>101.5%</b>

Source: OSPI Report 1049

Note: All projected enrollments shown are Full Time Equivalents (FTE).

**ACTUAL STUDENT ENROLLMENT 2007-2017**

School Type	Grade Level	School Year & Growth Progression Percentage																							
		2007	GP%	2008	GP%	2009	GP%	2010	GP%	2011	GP%	2012	GP%	2013	GP%	2014	GP%	2015	GP%	2016	GP%	2017	GP%	AVG GP%	
Elementary	K	1,404	--	1,494	--	1,566	--	1,468	--	1,468	--	1,492	--	1,592	--	1,545	--	1,464	--	1,571	--	1,623	--	--	
	1	1,467	102.2%	1,452	103.4%	1,549	103.7%	1,595	101.9%	1,496	101.9%	1,547	105.4%	1,569	105.2%	1,678	105.4%	1,622	105.0%	1,519	103.8%	1,596	101.6%	103.6%	
	2	1,491	99.6%	1,490	101.6%	1,425	98.1%	1,502	97.0%	1,542	96.7%	1,472	98.4%	1,517	98.1%	1,605	102.3%	1,693	100.9%	1,666	102.7%	1,524	100.3%	99.6%	
	3	1,453	101.3%	1,453	97.5%	1,500	100.7%	1,403	98.5%	1,477	98.3%	1,550	100.5%	1,461	99.3%	1,530	100.9%	1,636	101.9%	1,699	100.4%	1,682	101.0%	100.0%	
	4	1,418	99.9%	1,462	100.6%	1,445	99.4%	1,427	95.1%	1,392	99.2%	1,437	97.3%	1,528	98.6%	1,499	102.6%	1,585	103.6%	1,616	98.8%	1,691	99.5%	99.5%	
Middle	5	1,395	99.6%	1,426	100.6%	1,481	101.3%	1,425	98.6%	1,424	99.8%	1,341	96.3%	1,419	98.7%	1,546	101.2%	1,512	100.9%	1,589	100.3%	1,620	100.2%	99.8%	
	6	1,425	101.9%	1,383	99.1%	1,425	99.9%	1,499	101.2%	1,411	99.0%	1,429	100.4%	1,341	100.0%	1,400	98.7%	1,570	101.6%	1,486	98.3%	1,598	100.6%	100.1%	
	7	1,370	102.6%	1,424	99.9%	1,380	99.8%	1,408	98.8%	1,471	98.1%	1,406	99.6%	1,454	101.7%	1,366	101.9%	1,380	98.6%	1,566	99.7%	1,504	101.2%	100.2%	
	8	1,443	101.7%	1,370	100.0%	1,426	100.1%	1,379	99.9%	1,403	99.6%	1,437	97.7%	1,406	100.0%	1,449	99.7%	1,372	100.4%	1,424	103.2%	1,557	99.4%	100.2%	
High	9	1,822	127.4%	1,492	103.4%	1,389	101.4%	1,432	100.4%	1,396	101.2%	1,440	102.6%	1,441	100.3%	1,438	102.3%	1,481	102.2%	1,375	100.2%	1,425	100.1%	103.8%	
	10	1,464	80.0%	1,476	81.0%	1,438	96.4%	1,365	98.3%	1,401	97.8%	1,361	97.5%	1,422	98.8%	1,414	98.1%	1,422	98.9%	1,479	99.9%	1,366	99.3%	95.1%	
	11	1,373	90.8%	1,666	113.8%	1,384	93.8%	1,365	94.9%	1,309	95.9%	1,306	93.2%	1,275	93.7%	1,346	94.7%	1,318	93.2%	1,359	95.6%	1,328	89.8%	95.4%	
	12	1,049	76.4%	1,155	84.1%	1,421	85.3%	1,444	104.3%	1,460	107.0%	1,372	104.8%	1,357	103.9%	1,343	105.3%	1,398	103.9%	1,351	102.5%	1,340	98.6%	97.8%	
Elementary Middle School High School			Growth%		Growth%		Growth%		Growth%		Growth%		Growth%		Growth%		Growth%		Growth%		Growth%		Growth%	AVG %	
		8,628	100.5%	8,777	101.7%	8,966	102.2%	8,820	98.4%	8,799	99.8%	8,839	100.5%	9,086	102.8%	9,403	103.5%	9,512	101.2%	9,660	101.6%	9,736	100.8%	101.2%	
		4,238	101.3%	4,177	98.6%	4,231	101.3%	4,286	101.3%	4,285	100.0%	4,272	99.7%	4,201	98.3%	4,215	100.3%	4,322	102.5%	4,476	103.6%	4,659	104.1%	101.0%	
		5,708	98.9%	5,789	101.4%	5,632	97.3%	5,606	99.5%	5,566	99.3%	5,479	98.4%	5,495	100.3%	5,541	100.8%	5,619	101.4%	5,564	99.0%	5,459	98.1%	99.5%	
TOTAL:		18,574	100.2%	18,743	100.9%	18,829	100.5%	18,712	99.4%	18,650	99.7%	18,590	99.7%	18,782	101.0%	19,159	102.0%	19,453	101.5%	19,700	101.3%	19,854	100.8%	100.6%	

Source:OSPI

Note: All enrollments shown are Full Time Equivalents (FTE) as of October 1 of the year indicated.

*Appendix D*

**OFM Ratio Enrollment Projection Methodology**

## 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 projects how those percentage trends will continue into the future. Snohomish County prepares the population estimates by distributing official estimates from the Washington Office of Financial Management (OFM) to the school district level. The assumed percentage trends are then applied to these County population forecasts. Enrollment forecasts using this method are then compared with the six-year forecast prepared by the State Office of the Superintendent of Public Instructions (OSPI), with one being adopted as official forecast for the Capital Facilities Plan. OSPI does not forecast enrollments for Year 2035, so the Ratio Method is used for that purpose.

### Ratio Method

<b>Table D-1 Historical Student/Population Ratio</b>			
<b>Year</b>	<b>Population*</b>	<b>FTE Student Enrollment</b>	<b>Ratio</b>
2006	122,733	18,538	15.10%
2007	124,578	18,573	14.91%
2008	126,150	18,743	14.86%
2009	127,730	18,828	14.74%
2010	129,842	18,660	14.37%
2011	130,435	18,613	14.27%
2012	131,087	18,590	14.18%
2013	132,809	18,782	14.14%
2014	135,436	19,159	14.15%
2015	139,818	19,453	14.01%
<b>2016 CFP Estimate</b>			
2016	141,180	19,836	14.05%
2017	143,973	20,214	14.04%
<b>2016-17 Actual Enrollment</b>			
2016	142,065	19,700	13.87%
2017	144,602	19,854	13.73%

\* 2011-15 and 2021: Official County Estimate. 2016-2020: District Estimate

Table D-1 shows population estimates developed by Snohomish County over the past 12 years (2010 is the official census figure). Estimates have remained relatively constant for the past ten years. The 2035 population estimate (194,259) has been accepted by Everett, the County and Snohomish County Tomorrow (SCT) and is accepted by the District. It remains unchanged from the 2018 CFP.

Student enrollment totals were published by OSPI in late 2017. The ratio of student population to total population between 2006-2015 is shown at left. The 2016-2017 estimates for the 2016 CFP are also shown. The “2016-17 Actual Enrollment” are then shown for comparison purposes. Actual enrollments in 2016 and 2017 were less than that predicted in the 2016 CFP. This reflects a belief that household sizes are declining.

The Puget Sound Regional Council will be updating its estimates over the coming months, but it too will likely show a declining household size. District enrollment has declined as a percentage of population each year, from a high of 15.1% in 2006 to an estimated 13.73% in 2017.

For its planning purposes, the District has accepted the County's estimated population for 2023 and 2035. The District further accepts the OSPI enrollment projections through 2023. Finally, the District assumes that the student population ratio will continue to decline to 12.0% in 2035. In summary, the following OFM-based FTE enrollment figures are accepted for use in the 2018 CFP.

Actual				Estimated						
2014	2015	2016	2017	2018	2019	2020	2021	2022	2023	2035
<b>Population</b>										
135,756	138,818	142,065	144,602	147,361	150,119	152,878	155,637	158,395	161,154	194,259
<b>Ratio</b>										
14.11%	14.01%	13.87%	13.73%	13.70%	13.66%	13.65%	13.64%	13.54%	13.48%	12.0%
<b>Enrollment</b>										
19,159	19,453	19,700	19,854	20,183	20,493	20,867	21,220	21,439	21,718	23,311

***Appendix E***

***Kendrick Enrollment Projection Methodology***

## **Kendrick Enrollment Projection Methodology**

W. Les Kendrick, Ph.D., Educational Data Solutions, LLC

Enrollment for the Everett School District was projected using grade progression methods (cohort survival ratios) that track the progress of students as they progress from grade to grade. This method compares the enrollment in a given year at a specific grade (e.g., 2<sup>nd</sup> grade) to the enrollment at the previous grade from the previous year (1<sup>st</sup> grade). The ratio of these two numbers provides an indication of whether enrollment typically stays the same, grows, or declines as students progress from one grade to the next. The progression ratios at each grade level were averaged over several years and then applied to the current year grade level enrollment (e.g., 2<sup>nd</sup> grade) to predict next year's enrollment at the subsequent grade (e.g., 3<sup>rd</sup> grade). This was done for every grade except kindergarten. The numbers were then adjusted and modified based on additional information about housing and population growth within the District (more on this below).

Kindergarten enrollment was projected by comparing the kindergarten enrollment in a given year to county births 5 years prior to that year (birth-to-k ratio). The average of this number for the last several years was then used to predict next year's enrollment. The average was also applied to future known birth cohorts to project subsequent years. For years in which birth data was not available, births were projected based on forecasts of the county population available from State and local jurisdictions, State birth forecasts, the correlation between State and County birth rates, and an assessment of the most recently available fertility rates for the county.

After completing the initial forecast, the numbers were adjusted using new home construction data, county population forecasts, and forecasts of the future K-12 population in the county. New Home construction data was obtained from New Home Trends, including information about currently permitted units as well as information about future planned development within the Everett School District. Population forecasts for the county were obtained from State and county planning offices. And a forecast of the population for the Everett School District was created based on forecasts of growth for neighborhoods in and around the District and recent population estimates for the District. All of this information was considered and used to adjust the final forecast numbers, so that they would more closely reflect expected changes in housing and population growth within the District's boundary area in the coming years.

**Kendrick Enrollment Projects  
2018-23**

**Enrollment Projections by Grade**

<b>Grade Level</b>	<b>Actual 2017</b>	<b>Projections</b>					
		<b>2018</b>	<b>2019</b>	<b>2020</b>	<b>2021</b>	<b>2022</b>	<b>2023</b>
<b>K</b>	1,627	1,633	1,618	1,686	1,734	1,721	1,741
<b>1</b>	1,602	1,657	1,655	1,640	1,717	1,757	1,735
<b>2</b>	1,528	1,610	1,658	1,655	1,638	1,710	1,750
<b>3</b>	1,684	1,538	1,617	1,663	1,659	1,637	1,709
<b>4</b>	1,694	1,684	1,540	1,618	1,662	1,653	1,631
<b>5</b>	1,622	1,688	1,680	1,535	1,611	1,650	1,641
<b>6</b>	1,600	1,620	1,678	1,670	1,526	1,604	1,643
<b>7</b>	1,506	1,608	1,617	1,674	1,666	1,526	1,604
<b>8</b>	1,559	1,507	1,606	1,615	1,672	1,668	1,528
<b>9</b>	1,425	1,566	1,511	1,610	1,619	1,679	1,675
<b>10</b>	1,366	1,409	1,553	1,499	1,597	1,609	1,669
<b>11</b>	1,332	1,250	1,303	1,436	1,386	1,477	1,488
<b>12</b>	1,346	1,318	1,250	1,303	1,436	1,386	1,476
<b>Total</b>	<b>19,891</b>	<b>20,088</b>	<b>20,286</b>	<b>20,604</b>	<b>20,923</b>	<b>21,077</b>	<b>21,290</b>

**Enrollment Projections by Level**

<b>K-5</b>	9,757	9,810	9,768	9,797	10,021	10,128	10,207
<b>6-8</b>	4,665	4,735	4,901	4,959	4,864	4,798	4,775
<b>9-12</b>	5,469	5,543	5,617	5,848	6,038	6,151	6,308



***Appendix F***

***Appendix F of the General Policy Plan***

## 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, multi-family/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.

***Appendix G***

***Levels of Service Report***

## 2017-18

### Levels of Service Report

(October 2017 Enrollment)

#### Minimum Levels of service

Washington state law (RCW 36.70A.020) requires that public facilities and services necessary to support new housing developments shall be adequate to serve the development at the time the development is available for occupancy and use without decreasing current service levels below locally established minimum standards (minimum levels of services).

The Everett School District sets the minimum levels of service as the district-wide average class size. The district's class size goals are described in Section 3: Educational Program Standards, Minimum Levels of Service, on page 3-4. The average class sizes for the 2017-18 school year are shown below.

Average Class Size	
Elementary	
Kindergarten	21.2
Grades 1 - 3	22.6
Grades 4 - 5	25.6
Middle School	
Grades 6 - 8	23.3
High School	
Grades 9 - 12	23.0

***Appendix H***

***Impact Fee Report***

## 2016 & 2017 School Impact fee Report

Impact fees are collected on housing developments within unincorporated Snohomish County. These figures do not include any fees collected for the cities of Everett and Mill Creek. The revenues represent the total amount the district received from developers. The expenditures shows the amounts spent by the district at specific schools.

The mitigation fee credit shows the value of the Mitigation Fee Certificates used by developers. The charts shows the amount of the certificates claimed on developments within unincorporated Snohomish County. None of the certificates were used for developments within the cities of Everett and Mill Creek.

### 2016

#### Impact Fees <sup>1</sup>

Revenue:	\$ 1,164,132.00	
Expenditures:	\$ 1,147,852.13	<u>Sites</u>
	\$ 239,891.07	Cedar Wood Elementary School
	\$ 320,764.16	Forest View Elementary School
	\$ 113,413.57	Jackson Elementary School
	\$ 137,000.26	Lowell Elementary School
	\$ 100,854.82	Silver Lake Elementary School
	\$ 235,504.69	Whittier Elementary School
	\$ 423.56	HM Jackson High School

#### Mitigation Fee Credit <sup>2</sup>

2016 Beginning Balance: \$ 2,087,581.00

Mitigation Fee Certificates: \$ 588,584.00

2016 Ending Balance: \$ 1,498,997.00

### 2017

#### Impact Fees <sup>1</sup>

Revenue:	\$ 931,292.00	
Expenditures:	\$ 163,334.82	<u>Sites</u>
	\$ 97.04	Jackson Elementary School
	\$ 97.04	Lowell Elementary School
	\$ 97.04	Silver Lake Elementary School
	\$ 97.04	Whittier Elementary School
	\$ 162,946.66	Eisenhower Middle School

#### Mitigation Fee Credit <sup>2</sup>

2017 Beginning Balance: \$ 1,498,997.00

Mitigation Fee Certificates: \$ -

2017 Ending Balance: \$ 1,498,997.00

#### Notes:

1. Impact fee revenue was expended to relocate existing portables and/or purchase new portables to provide additional capacity at schools with unhoused students.

2. In 2007, the District purchased a 30 acre parcel on 180th Street SE as a site for future schools. As part of the purchase and sale agreement with the seller was a Mitigation Fee Credit for \$4,660,000. All redeemed certificates are credited towards the existing balance.