
MOUNT VERNON SCHOOL DIST. NO. 320

CAPITAL FACILITIES PLAN

2017

Adopted by Board of Directors:
November 1, 2017

Prepared by
Mount Vernon School District No. 320

**CAPITAL FACILITIES PLAN
Mount Vernon School District No. 320**

BOARD OF DIRECTORS

**Robert Coffey
Tony Cook
Olivia DeLeon
Larry Otos
Wendy Ragusa**

SUPERINTENDENT

Dr. Carl Bruner

For information on the Mount Vernon School District Capital Facilities Plan, please contact Carl Bruner at the Mount Vernon School District, 124 E. Lawrence Street, Mount Vernon, Washington 98273 [Phone: (360) 428-6100].

TABLE OF CONTENTS

| | |
|--|---|
| SECTION 1: INTRODUCTION | 1-1 |
| Purpose of the Capital Facilities Plan | 1-1 |
| Significant Issues Related to the Facility Planning in the Mount Vernon School District..... | 1-1 |
| SECTION 2: DEFINITIONS..... | 2-1 |
| SECTION 3: DISTRICT EDUCATIONAL PROGRAM STANDARDS | 3-1 |
| Educational Program Standards for K-12 | 3-2 |
| SECTION 4: CAPITAL FACILITIES INVENTORY | 4-1 |
| Capital Facilities..... | 4-1 |
| Schools | 4-1 |
| Relocatable Classroom Facilities (Portables)..... | 4-2 |
| Support Facilities | 4-3 |
| Land Inventory | 4-4 Error! Bookmark not defined. |
| SECTION 5: STUDENT ENROLLMENT TRENDS AND PROJECTIONS..... | 5-1 |
| Recent District Trends – FTE Student Enrollment 2009-2016..... | 5-1 |
| Projected Student Enrollment: 2017-2023..... | 5-1 |
| SECTION 6: CAPITAL FACILITIES PLAN | 6-1 |
| Facility Needs (2017-2023)..... | 6-1 |
| Planned Improvements (2017-2023)..... | 6-3 |
| School Additions/Renovations | 6-3 |
| Capital Facilities Financing Plan | 6-5 |
| General Obligation Bonds..... | 6-5 |
| State Funding Assistance | 6-5 |
| School Impact Fees | 6-6 |

Appendices

| | |
|--|--|
| Appendix A – Impact Fee Calculation | |
| Appendix B – OSPI Enrollment Projections | |
| Appendix C – District Enrollment Projections | |
| Appendix D – Student Generation Rate Methodology | |

List of Figures

| | |
|--|-----|
| Figure 1 – Map of District Facilities..... | 1-3 |
|--|-----|

List of Tables

Table 1 – Mount Vernon School District Elementary School Capacity Inventory 4-2
Table 2 – Mount Vernon School District Middle School Capacity Inventory 4-2
Table 3 – Mount Vernon School District High School Capacity Inventory..... 4-2
Table 4 – Mount Vernon School District Capacity in Portables 4-3
Table 5 – Mount Vernon School District Support Facilities 4-3
Table 6 – Enrollment (FTE) 2009-2016 5-1
Table 7 – 2017-2023 Projected FTE Enrollment 5-2
Table 8 – Projected Student Capacity: 2017-2023 6-2
Table 9 – Capital Facilities Plan 2017-2023 6-4
Table 10 – Student Generation Rates..... 6-7
Table 11 – Proposed Impact Fee Schedule 6-7
Table 12 – Impact Fee Variables Table – Mount Vernon School District 6-8

SECTION 1: INTRODUCTION

Purpose of the Capital Facilities Plan

The Washington Growth Management Act (the GMA) outlines 13 broad goals including adequate provision of necessary public facilities and services. Schools are among these necessary facilities and services. The Mount Vernon School District (District) has 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 population anticipated in the District. The CFP has been revised and updated in 2017.

This Capital Facilities Plan (CFP) is intended to provide the Mount Vernon School District, Skagit County and the City of Mount Vernon with a description of facilities needed to accommodate projected student enrollment at acceptable levels of service through the year 2023. The CFP also provides a detailed schedule and financing program for capital improvements over the 6-year planning period.

In accordance with GMA mandates, this CFP contains the following required elements:

- Future enrollment forecasts for each grade span (elementary, middle and high).
- An inventory of existing capital facilities owned by the District, showing the locations 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.
- A calculation of impact fees to be assessed and support data substantiating said fees.

In developing this CFP, the District consulted Chapter 11 of the Skagit County Comprehensive Plan (Capital Facilities). Policy 11A-1.6 allows for the District to document its needs through a Capital Facilities Plan, which will be accepted by the City and County if found to be consistent with their respective plans. The specific requirements for school districts to become eligible for collection of development impact fees are found in Skagit County Ordinance 15432 and Mount Vernon Ordinance 2552, including any subsequent amendments to those ordinances.

Significant Issues Related to the Facility Planning in the Mount Vernon School District

Population growth and State policies affecting education have had and will continue to have a significant impact on the District's instructional space. The most significant issue in the District in 2017 is capacity and the effect of recent enrollment growth and future projected growth. The rapid growth in the District has made it impossible to provide new,

permanent facilities in time to prevent overcrowding in existing schools and has resulted in many students being housed in portable classrooms.

Full time equivalent (FTE) enrollment on October 1, 2016, was 6,678 students. (Source: *Office of the Superintendent of Public Instruction*) Headcount enrollment on the same day was 6,858. Enrollment for the 2022-2023 school year is projected to be 7,097 based on the District's medium forecast prepared by a professional demographer. See Appendix C.

Student capacity at the District's facilities has faced continuing pressures over the past decade. Prior to completion of Phase 1 in 1997, every school in the District had been operating at or beyond enrollment capacity for at least five years. The District reconfigured grade levels in the 2014 school year in an effort to accommodate enrollment needs at the elementary level. While this provided some temporary relief, the schools in the District are again operating well beyond permanent capacity. Enrollment projections at all grade levels forecast continued growth from in-migration over the next six years and beyond.

Enrollment at the High School on October 1, 2016, was 2,167 FTE students. The District is closely monitoring enrollment at the high school level. Between 2009 and 2016 high school enrollment increased by 14.8%. The District's enrollment projections show continued enrollment growth at this grade level though with some leveling off by 2022 but then increasing again thereafter. Currently the High School is well beyond its permanent capacity of 1,596 students. In 2006, the District added capacity for an additional 225 students at the High School. Recently, a classroom addition was completed adding capacity for an additional 96 students. The District employs 15 portable classrooms to accommodate this overcrowding.

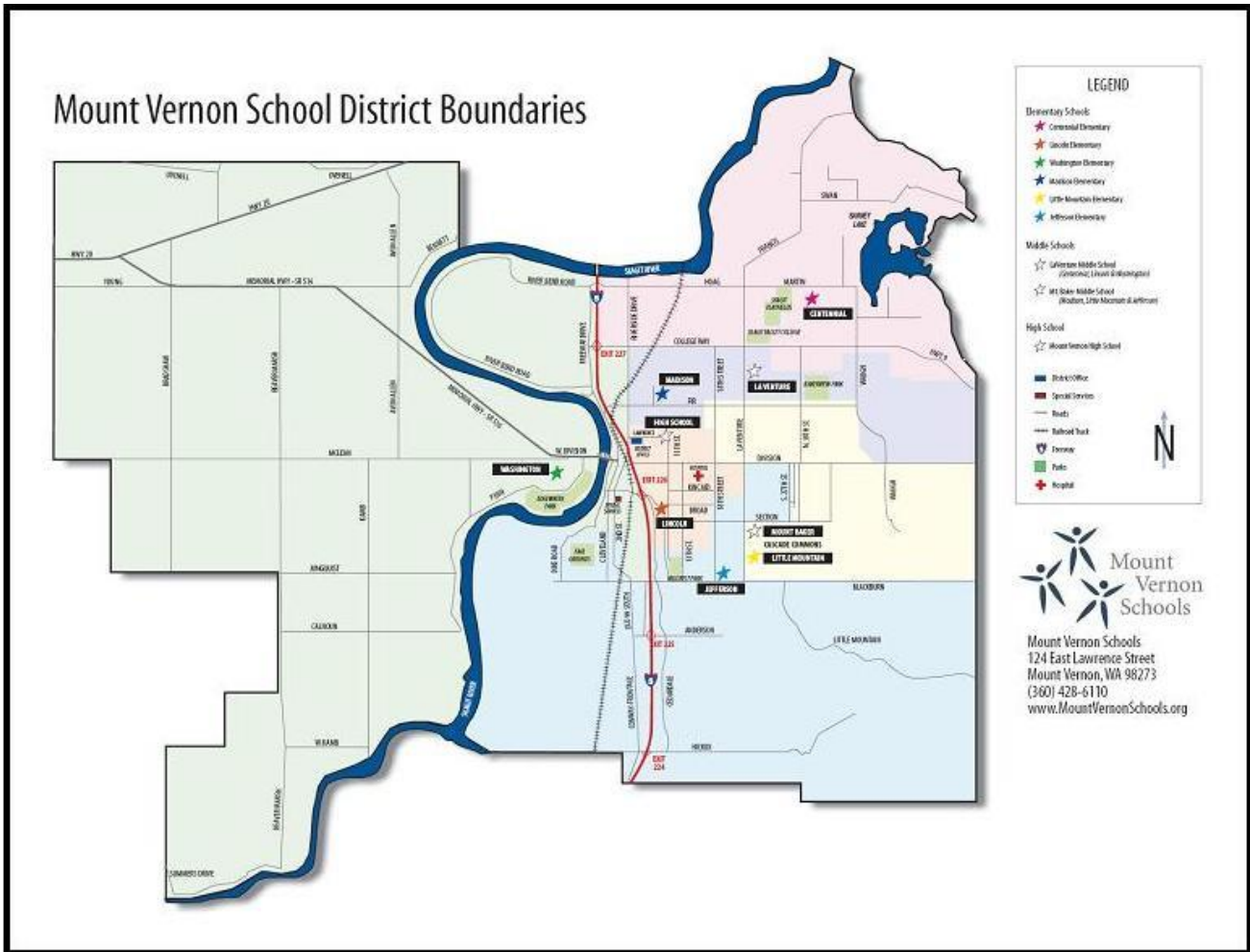
Elementary enrollment continues to grow and exceeds permanent capacity. There are currently 36 portable buildings being used at elementary sites to accommodate overcrowding. Middle school enrollment similarly exceeds permanent capacity and the District relies on 17 portable buildings for classroom needs.

To keep pace with growth, the District relies on its Six-Year Capital Facilities Plan to ensure adequate capacity. The plan indicates a need to construct an additional elementary school, add capacity at Madison Elementary School and LaVenture Middle School, and add capacity at the High School by replacing and expanding the existing Agriculture Building.

The District's voters approved a \$106.4 million bond issue in 2016 to fund the projects identified in this Capital Facilities Plan. Development impact fees will be necessary to supplement these funds and to offset, at least in part, the effects of growth.

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

Figure 1 – Map of District Facilities



SECTION 2: DEFINITIONS

Average Assessed Value means the average assessed value by dwelling unit type of all residential units constructed within the District.

Board means the Board of Directors of the Mount Vernon School District (“School Board”).

Capital Facilities means school facilities identified in the District’s Capital Facilities Plan. Capital facilities are defined as any structure, improvement, piece of equipment or other major asset, including land that has a useful life of at least ten years

Capital Facilities Plan (CFP) means the District’s facilities plan adopted by its school board meeting the requirements of the Growth Management Act, Chapter 11 of the Skagit County Comprehensive Plan, Skagit County Ordinance 15432 and Mount Vernon Ordinance 2552, and any subsequent amendments to those ordinances. The definition refers to this document.

City means the City of Mount Vernon.

County means Skagit County.

County Commission means the Skagit County Board of Commissioners.

City Council means the Mount Vernon City Council.

Construction Cost Allowance means the maximum cost per square foot of construction that the state will recognize. This amount is established by the legislature in the biennium budget.

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

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

District means Mount Vernon School District No. 320.

District Property Tax Levy Rate means the District’s current capital property tax rate per thousand dollars of assessed value.

Dwelling Unit Type means (1) single-family residences and (2) multi-family apartment or condominium units.

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

Estimated Facility Construction Cost means the planned costs of new schools or the actual construction costs of schools of the same grade span recently constructed by the District, including on-site and off-site improvement costs.

FTE (Full Time Equivalent) is a means of measuring student enrollment based on the number of hours per day in attendance at the District's schools. A student is considered one FTE if he/she is enrolled for the equivalent of a full schedule each school day. The District implemented all-day Kindergarten in the 2013-14 school year, meaning that Kindergarten classes, along with all other grades, are considered to contain one FTE per student.

Grade Span means a category into which the District groups its grades of students (e.g., elementary, middle or junior high, and high school). Starting in the fall of 2014, grade spans for the Mount Vernon 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) means the Growth Management Act, Chapter 17, Laws of the State of Washington of 1990, 1st Ex. Sess., as now in existence or as hereafter amended.

Interest Rate means the current interest rate as stated in the Bond Buyer Twenty-Bond General Obligation Bond Index.

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

Multi-Family Dwelling Unit means any residential dwelling unit that is not a single-family unit.

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

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

Portables: Synonym for Relocatable Facilities.

R.C.W. means the Revised Code of Washington.

Relocatable Facilities (also referred to as Portables) means factory-built structures, transportable in one or more sections, that are designed to be used as an education spaces and are needed to prevent the overbuilding of school facilities, to meet the needs of service areas within the District, or to cover the gap between the time that families move into new

residential developments and the date that construction is completed on permanent school facilities. Portables are not considered permanent classrooms by the District.

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

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

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

SEPA means the State Environmental Policy Act.

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

Standard of Service means the standard adopted by the District which identifies the program year, the class size by grade span and taking into account the requirements of students with special needs, the number of classrooms, the types of facilities within 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 means the proportion of funds that are provided to the District for specific capital projects from the State's Common School Construction Fund. These funds are disbursed based on a formula which calculates district assessed valuation per pupil relative to the whole state assessed valuation per pupil to establish the maximum percentage of the total project eligible to be paid by the State.

Student Factor [Student Generation Rate (SGR)] means the average number of students generated from new dwelling units constructed within the District. The District uses a statistically valid methodology to calculate a SGR for single family dwelling units and a SGR for multi-family dwelling units.

Unhoused Students means students projected to be housed in classrooms where class size exceeds standards within the District and students area projected to be housed in portable classrooms.

SECTION 3: DISTRICT EDUCATIONAL PROGRAM STANDARDS

School facility and student capacity needs are dictated by the types and amounts of space required to accommodate the School Board's 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 mandates and community expectations may affect how classroom space is used. Traditional educational programs offered by school districts are often supplemented by non-traditional or special programs such as: Special Education, English as a Second Language, education, remediation, migrant education, alcohol and drug education, AIDS education, preschool and daycare programs, computer labs, music programs, etc. These special or nontraditional educational programs can have a significant impact on the available student capacity of school facilities.

Special programs offered by the Mount Vernon School District at specific school sites include:

- Highly Capable Program
- Learning Assisted Programs (LAP),
- Education for disadvantaged students (Title 1),
- English-as-a-Second Language programs (ESL),
- Severe behavior disordered programs, and
- Moderate to severe disabilities programs.

Variations in student capacity between schools are often a result of what special or nontraditional programs are offered at specific schools. These special programs require classroom space that can reduce the permanent capacity of the buildings housing these programs. Some students, for example, leave their regular classroom for a period of time to receive instruction in these special programs. Newer schools within the District have been designed to accommodate many of these programs. However, older schools often require space modifications to accommodate special programs, and in some circumstances, these modifications may reduce the overall classroom capacities of the buildings.

The District now provides all-day kindergarten at all elementary schools.

District educational program standards will undoubtedly change in the future as a result of changes in the program year, special programs, class size, grade span configurations, and use of new technology, and other physical aspects of the school facilities. In addition, implementing State level policy directives regarding small K-3 class size will influence program standards. School capacity inventory will be reviewed periodically and adjusted for any changes to the educational program standards. These changes will also be reflected in future updates of this Capital Facilities Plan (CFP). The District's minimum educational program standards, which directly affect school capacity, are outlined below.

Educational Program Standards for K-12

- Class size for K-2nd should not exceed 20 students.
- The goal for average class size for grades 3rd-12th is 26 students.
- The District goal for K-5 enrollment is that no K-5 school should house more than 550 students in permanent facilities.
- Special needs students at all grade levels will be integrated into general classrooms whenever possible. Self-contained classrooms will be provided for severely disabled students as needed.
- All students will be provided music instruction in a separate classroom.
- All students will have access to computer technology, either within the regular classroom or in a computer lab setting.
- All students will be provided ample facilities for physical education programs.
- Secondary (6-12) students will have adequately equipped facilities for science, art, business, technology, vocational programs and all courses offered in the District's secondary curriculum.

SECTION 4: CAPITAL FACILITIES INVENTORY

Capital Facilities

Under the GMA cities and counties are required to inventory capital facilities used to serve existing development. The purpose of the facilities inventory is to establish a baseline for determining what facilities will be required to accommodate future demand (student enrollment) at acceptable or established educational program standards. This section provides an inventory of capital facilities owned and operated by the Mount Vernon School District including schools, relocatable classrooms (Portables), developed school sites, undeveloped land and support facilities. School facility capacity was inventoried based on the space required to accommodate the District's adopted educational program standards (see Section 3). A map showing locations of District facilities is provided as Figure 1.

A detailed school capacity analysis is provided in Tables 1, 2 and 3. Relocatable classrooms (Portables) are not viewed by the District as a solution for housing students on a permanent basis. Therefore, these facilities were not included in the school capacity calculations provided in Tables 1, 2 and 3. Use of Portables is discussed in more detail in the following section.

Schools

The Mount Vernon School District has currently six elementary schools, two middle schools and one high school.

The State (OSPI) calculates school capacity by dividing gross square footage of a building by a standard square footage per student. This method is used by the State as a simple and uniform approach for determining school capacity for purposes of allocating available State Funding Assistance to school districts for new school construction. This method is not necessarily considered to be an accurate reflection of the *functional* capacity required to accommodate the adopted educational program of each individual district. For these reasons, school capacity was determined based on the number of teaching stations within each building and the space requirements of the District's adopted educational program. These capacity calculations were used to establish the District's baseline capacity and determine future capacity needs based on projected student enrollment.

Table 1 – Mount Vernon School District Elementary School Capacity Inventory

| Elementary School | Site Size (acres) | Bldg. Area (Sq. Ft.) | Perm. FTE Student Capacity | Capacity with Portables | Year Built or Last Remodel |
|----------------------------------|--------------------------|-----------------------------|-----------------------------------|--------------------------------|-----------------------------------|
| Centennial | 15.0 | 54,084 | 550 | 706 | 1989/92 |
| Jefferson + CLT | 10.0 | 61,131 | 605 | 629 | 1956/95 |
| Lincoln | 3.85 | 40,002 | 375 | 399 | 1938/82 |
| Little Mountain (shared site) | 34.0 | 79,553 | 525 | 837 | 1997 |
| Madison | 18.57 | 45,239 | 450 | 606 | 1954/83 |
| Washington | 13.66 | 49,805 | 425 | 529 | 1950/98 |
| Total | 105.08 | 329,814 | 2,930 | 3,706 | |

Source: Mount Vernon School District

Table 2 – Mount Vernon School District Middle School Capacity Inventory

| Middle School | Site Size (acres) | Bldg. Area (Sq. Ft.) | Perm. FTE Student Capacity | Capacity with Portables | Year Built or Last Remodel |
|------------------------------|--------------------------|-----------------------------|-----------------------------------|--------------------------------|-----------------------------------|
| LaVenture | 19.6 | 86,467 | 550 | 758 | 1970 / 2004 |
| Mount Baker (shared site) | 34 acres | 52,762 | 550 | 784 | 1997 |
| Totals | 53.6 | 139,229 | 1,100 | 1,542 | |

Source: Mount Vernon School District

Table 3 – Mount Vernon School District High School Capacity Inventory

| High School | Site Size (acres) | Bldg. Area (Sq. Ft.) | Perm. FTE Student Capacity | Capacity with Portables | Year Built or Last Remodel |
|--------------------|--------------------------|-----------------------------|-----------------------------------|--------------------------------|-----------------------------------|
| Mount Vernon H.S. | 32.5 | 256,942 | 1596 | 1,986 | 1922/2012 |
| Skagit Valley LC | | | | | |
| Totals | 32.5 | 256,942 | 1596 | 1,986 | |

Source: Mount Vernon School District

Relocatable Classroom Facilities (Portables)

Relocatable classroom facilities (Portables) are used as interim classroom space to house students until funding can be secured to construct permanent classroom facilities. Portables are not viewed by the District as a solution for housing students on a permanent basis.

The Mount Vernon School District currently uses 73 Portables at various school sites throughout the District to provide additional interim capacity. A typical portable classroom

can provide capacity for 26 elementary, middle or high school students. Current use of Portables throughout the District is summarized in Table 4.

Table 4 – Mount Vernon School District Portables

| School Name | Portables | Capacity in Portables |
|-------------------------------|-----------|-----------------------|
| <u>ELEMENTARY</u> | | |
| Centennial | 6 | 156 |
| Jefferson | 4 | 104 |
| Lincoln | 4 | 104 |
| Little Mountain | 12 | 312 |
| Madison | 6 | 156 |
| Washington | 4 | 104 |
| <i>Total</i> | 36 | 936 |
| <u>MIDDLE</u> | | |
| LaVenture | 8 | 208 |
| Mount Baker | 9 | 234 |
| <i>Total</i> | 17 | 442 |
| <u>HIGH</u> | | |
| Mount Vernon H.S. | 15 | 390 |
| Skagit Valley Learning Center | 5 | 130 |
| District Total | 73 | 1,898* |

Support Facilities

In addition to schools, the Mount Vernon School District owns and operates additional facilities that provide operational support functions to the schools. An inventory of these facilities is provided in Table 5.

Table 5 – Mount Vernon School District Support Facilities

| Facility Name | Building Area (Sq. Ft.) |
|--|-------------------------|
| District Office | 12,500 |
| Special Services office | 4,500 |
| Transportation, Bus Wash, Storage | 31,765 |
| Maintenance, IT Dept, Food Services with Storage | 21,705 |
| SFLC | |
| Transitions/SPED | |

Land Inventory

The Mount Vernon School District owns eight undeveloped sites described below:

1. 10 acres on East Division Street
 - a. Not considered useful for any school purpose
2. 15.23 acre site near Division Street
 - a. New elementary school opening in Fall 2018 as the replacement school for Lincoln Elementary School
3. 10 acres on Swan Road
 - a. Future elementary school site to accommodate growth
4. 7.5 acres on Cleveland Street
 - a. Not considered useful for any school purpose
5. 201 Fulton (YMCA lease)
6. Lot, 1106 E. Warren (Added to MVHS)
 - a. This lot for future expansion at the High School
7. Lot, 1118 E. Warren (Added to MVHS)
 - a. This lot for future expansion at the High School
8. Parking Lot (Lincoln School) 1002 S 11th Street (added to Lincoln School)

SECTION 5: STUDENT ENROLLMENT TRENDS AND PROJECTIONS

Recent District Trends – FTE Student Enrollment 2009-2016

Facility needs are determined in part by evaluating recent trends in student enrollment. Note that Table 6 is adjusted for the grade reconfiguration that occurred in the 2014 school year and reflects headcount enrollment. The headcount enrollment figures do not accurately reflect FTE enrollment. Please refer to Table 8 for 2016 FTE figures.

Table 6 – Enrollment 2009-2016

| Grade Level | 2009 | 2010 | 2011 | 2012 | 2013 | 2014 | 2015 | 2016 |
|--------------------|-------|-------|-------|-------|-------|-------|-------|-------|
| K-5 | 2,858 | 2,946 | 2,930 | 2,897 | 2,944 | 2,998 | 3,078 | 3,043 |
| 6-8 | 1,358 | 1,354 | 1,303 | 1,308 | 1,336 | 1,360 | 1,368 | 1,383 |
| 9-12 | 1,888 | 1,849 | 2,124 | 2,123 | 2,081 | 2,214 | 2,215 | 2,271 |
| Total | 6,104 | 6,149 | 6,357 | 6,328 | 6,361 | 6,572 | 6,661 | 6,697 |

**Source: OSPI
Report 1049
(October Enrollment)**

Projected Student Enrollment: 2017-2023

This plan update is based on the anticipated number of students expected to be enrolled through 2023 and beyond. The six-year projection (2017-2023) will assist in determining short term needs and form the basis for development impact fees.

Enrollment projections are most accurate for the initial years of the forecast period. Moving further into the future, more assumptions about economic conditions and demographic trends in the area affect the projection. In the event that enrollment growth slows, plans for new facilities can be delayed. It is much more difficult, however, to initiate new projects or speed projects up in the event enrollment growth exceeds the projections. Annual updates of both the enrollment projections and the Capital Facilities Plan (CFP) are essential to good facility planning.

Two population forecasts were conducted for the Mount Vernon School District. The first is an estimate by the Superintendent of Public Instruction (OSPI). OSPI estimates future enrollment through the 2021-22 school year using the cohort survival method. This method estimates how many students in one year will attend the next grade in the following year. Due to the fact that the cohort survival method does not incorporate in-migration, particularly from anticipated new development within the District, these projections are considered conservative. The second forecast (W. Les Kendrick, Ph.D. November 2013) considers births and births forecasts, projected changes in the Skagit County population, and trends and forecasts of the county K-12 population within the Mount Vernon School District (the “modified projection method”). Its projections run through 2033. In order to

plan appropriately for facilities needs, the District uses the modified projection method to assess future capacity needs.

Table 7 – 2017-2023 Projected FTE Enrollment

| <i>Projection</i> | <i>2016*</i> | <i>2017-18</i> | <i>2018-19</i> | <i>2019-20</i> | <i>2020-21</i> | <i>2021-22</i> | <i>2022-23</i> | <i>Actual Change</i> | <i>Percent Change</i> |
|-------------------|--------------|----------------|----------------|----------------|----------------|----------------|----------------|----------------------|-----------------------|
| OSPI^ | 6,678 | 6,800 | 6,787 | 6,736 | 6,746 | 6,727 | 6,727 | 49 | 0.73% |
| District** | 6,678 | 6,565 | 6,642 | 6,714 | 6,813 | 6,977 | 7,097 | 419 | 6.3% |

* Actual FTE enrollment (October 1, 2016).

** Source: Mount Vernon School District, Kendrick, November 2016. FTE enrollment projections through 2022-23.

^ Headcount enrollment projections 2017-2022.

Please see Appendix B & C for the complete enrollment projections.

SECTION 6: CAPITAL FACILITIES PLAN

This update of the Mount Vernon School District's Six-Year Capital Facilities Plan reflects the planning and implementation of a building program to deal with current and future capacity issues.

Following is a list of past projects completed by the Mount Vernon School District:

- 2005 - The District completed the renovation of LaVenture Middle School.
- 2002 - The Special Services Department was relocated from the High School, which involved the purchase of a downtown office building.
- 2003 - The District's Support Facilities were relocated from the High School, which involved the construction of a replacement facility at the District's Blackburn Site.
- 2006 - The District renovated and added capacity to Mount Vernon High School. A new Career and Technical Education building was completed in April 2006.
- 2012 - The gymnasium/field house modernization at the High School was completed; lockers were replaced and bathrooms redone.
- 2017 – The State of Washington built four small CLT classrooms of cross laminated timber at Jefferson School.

The District is now planning the construction of a replacement of Lincoln Elementary School (current capacity 375 students) with a new elementary school located on East Division Street. The new school will have capacity for 550 students. The District will also replace the existing Madison School (capacity 425 students) with a new Madison Elementary School (capacity 550 students). The District also plans to add capacity at LaVenture Middle School, and to renovate and replace (with expanded capacity) the Agriculture Building at the Mount Vernon High School. These projects were funded as a part of the bond approved by the voters in February 2016. The District will repurpose Lincoln Elementary School after completing the new elementary school and Madison Elementary School projects.

Facility Needs (2017-2023)

Projected available student capacity was derived by subtracting projected FTE student enrollment from existing school capacity for each of the six years in the forecast period (2017-2023). Capacity needs are expressed in terms of "unhoused students." Unhoused students are defined as students expected to be housed in portable classrooms, in classrooms where class size exceeds State standards, Board expectations and/or contractually negotiated agreements within the local school district. The unhoused student levels are shown in Table 8. Note: for purposes of assessing capacity, the District has included the capacity improvements that are planned over the six year planning period. Additional information regarding the planned capacity improvements can be found on page 6-4 and in Table 9.

Table 8 – Projected Student Capacity: 2017-2023

Elementary School -- Surplus/Unhoused

| | 2016* | 2017-18 | 2018-19 | 2019-20 | 2020-21 | 2021-22 | 2022-23 |
|-------------------------------------|--------------|----------------|--------------------|----------------|----------------|----------------|----------------|
| Existing Capacity | 2,930 | 2,930 | 2,555 [^] | 3,105 | 3,230 | 3,230 | 3,230 |
| Added Permanent Capacity | 0 | 0 | 550+ | 125++ | 0 | 0 | 0 |
| Total Permanent Capacity | 2,930 | 2,930 | 3,105 | 3,230 | 3,230 | 3,230 | 3,230 |
| Temporary Capacity | 795 | 795 | 525 | 525 | 525 | 525 | 525 |
| Enrollment | 3,093 | 3,147 | 3,136 | 3,138 | 3,152 | 3,208 | 3,244 |
| Surplus (Deficiency)** | (163) | (217) | (31) | 92 | 78 | 22 | (14) |
| Surplus (Deficiency) with Portables | 632 | 578 | 494 | 617 | 603 | 547 | 511 |

*Actual October 2016 FTE enrollment (OSPI Report 1251)

[^]Lincoln Elementary repurposed

**Permanent Capacity only

+New Elementary School at East Division Street; ++Madison Elementary Replacement/Capacity Addition

Middle School Level -- Surplus/Unhoused

| | 2016* | 2017-18 | 2018-19 | 2019-20 | 2020-21 | 2021-22 | 2022-23 |
|-------------------------------------|--------------|----------------|----------------|----------------|----------------|----------------|----------------|
| Existing Capacity | 1,100 | 1,100 | 1,100 | 1,100 | 1,100 | 1,340 | 1,340 |
| Added Permanent Capacity | 0 | 0 | 0 | 0 | 240+ | 0 | 0 |
| Temporary Capacity | 442 | 442 | 442 | 442 | 442 | 442 | 442 |
| Total Capacity** | 1,100 | 1,100 | 1,100 | 1,100 | 1,340 | 1,340 | 1,340 |
| Enrollment | 1,418 | 1,493 | 1,566 | 1,597 | 1,608 | 1,582 | 1,581 |
| Surplus (Deficiency)** | (318) | (393) | (466) | (497) | (268) | (242) | (241) |
| Surplus (Deficiency) with Portables | 124 | 49 | (24) | (55)) | 174 | 200 | 201 |

*Actual October 2016 FTE enrollment (OSPI Report 1251)

**Permanent Capacity only

+LaVenture MS Addition.

High School Level -- Surplus/Unhoused

| | 2016* | 2017-18 | 2018-19 | 2019-20 | 2020-21 | 2021-22 | 2022-23 |
|-------------------------------------|--------------|----------------|----------------|----------------|----------------|----------------|----------------|
| Existing Capacity | 1,596 | 1,596 | 1,596 | 1,596 | 1,596 | 2,032 | 2,032 |
| Added Permanent Capacity | 0 | 0 | 0 | 0 | 0 | 436+ | 0 |
| Temporary Capacity | 300 | 300 | 300 | 300 | 300 | 300 | 300 |
| Total Capacity** | 1,596 | 1,596 | 1,596 | 1,596 | 1,596 | 2,032 | 2,032 |
| Enrollment | 2,167 | 1,925 | 1,940 | 1,979 | 2,053 | 2,188 | 2,272 |
| Surplus (Deficiency)** | (571) | (329) | (344) | (383) | (457) | (156) | (240) |
| Surplus (Deficiency) with Portables | (181) | 61 | 46 | 7 | (157) | 144 | 60 |

*Actual October 2016 FTE enrollment (OSPI Report 1251)

**Permanent Capacity only

+High School Addition

Planned Improvements (2017-2023)

The following is a brief outline of projects needed to accommodate projected student enrollment in the Mount Vernon School District through the Year 2023 based on the enrollment projections in Appendix A and Tables 7 and 8. To the extent these improvements correct *growth related* capacity deficiencies, their costs can be partially financed with impact fees.

The Capital Facilities Plan (CFP) is shown on Table 9.

School Projects: Including School Replacements, Additions and Renovations

- A new elementary school “East Division”, 71,400 sf (currently eligible for State Funding Assistance) is attributable to new enrollment growth. Cost of facility is \$42.0 million.
- A replacement school (currently eligible for State Funding Assistance) at the Old Madison site. Estimated cost is \$39.7 million
- An addition at LaVenture Middle School to accommodate growth (estimated cost of \$9.6 million).
- Replacement and addition of the Agriculture building at the High School to accommodate growth needs (estimated cost of \$21.8 million).
- Renovation and modernization of Old Main at the High School; estimated cost is \$19.9 million

As needed, the District may also purchase portables to address growth-related needs.

Table 9 – Capital Facilities Plan 2017-2023

Improvements Adding Permanent Capacity (Costs in Millions)**

| Project | 2017 | 2018 | 2019 | 2020 | 2021 | 2022 | Total Cost | Bonds/ Local Funds | Projected State Match | Impact Fees |
|---|---------|---------|---------|--------|------|------|------------|--------------------|-----------------------|-------------|
| Elementary | | | | | | | | | | |
| New Elementary at East Division | \$30.00 | \$12.00 | | | | | \$42.00 | X | X | X |
| Madison Replacement/Addition | | \$25.00 | \$14.70 | | | | \$39.70 | X | X | X |
| Middle School | | | | | | | | | | |
| LaVenture Addition | | | \$6.000 | \$3.60 | | | \$9.60 | X | | X |
| | | | | | | | | | | |
| High School | | | | | | | | | | |
| | | | | | | | | | | |
| Agriculture Building Replacement/Addition | | | \$15.00 | \$6.80 | | | \$21.800 | X | | X |

** Using 2017 estimated project costs.

^As needed, the District may also purchase portables to address growth needs.

Improvements Not Adding New Permanent Capacity (Costs in Millions)

| Project | 2017 | 2018 | 2019 | 2020 | 2021 | 2022 | Total Cost | Bonds/ Levies | Projected State Match | Impact Fees |
|------------------------|------|------|---------|--------|------|------|------------|---------------|-----------------------|-------------|
| Elementary | | | | | | | | | | |
| N/A | | | | | | | | | | |
| Middle | | | | | | | | | | |
| N/A | | | | | | | | | | |
| High School | | | | | | | | | | |
| Old Main Modernization | | | \$15.00 | \$4.00 | | | \$19.90 | X | | |
| | | | | | | | | | | |
| District-wide | | | | | | | | | | |
| N/A | | | | | | | | | | |
| | | | | | | | | | | |

Capital Facilities Financing Plan

The Six-Year Finance Plan shown on Table 9 demonstrates how the Mount Vernon School District intends to fund new construction and improvements to school facilities for the years of 2017-2023. The financing plan and impact fee calculation formula also differentiate between capacity and noncapacity projects.

The District's ability to accomplish its building program is dependent on the following funding sources:

- Passage of general obligation bonds by District voters
- Collection of growth mitigation payments (impact fees)
- State funding assistance
- Incurring of debt within the limit of non-voted capacity
- Conway School District (K-8) participation in High School Projects

General Obligation Bonds/Non-Voted Debt

Bonds are typically used to fund construction of new schools and other capital improvement projects. A 60% voter approval is required to pass a bond. Bonds are then retired through collection of property taxes. The voters in the Mount Vernon School District approved a capital improvements bond for \$29.5 million in 1994. In addition, the voters approved an additional bond for \$33.0 million in 1999 and a \$33 million bond issue in 2001. All funds from these bond issues have been committed. Most recently, the voters approved a \$106.4 million bond in February 2016. These bond funds are committed to the projects identified in this Capital Facilities Plan.

State Funding Assistance

State Funding Assistance (formerly known as "State Match Funds") comes from the Common School Construction Fund. 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 specific capital projects. To qualify, a project must first meet a State established criteria of need. This is determined by a formula that specifies the amount of square footage the State will help finance to provide permanent structures for the unhoused 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. In general, the State contribution can range from less than half to more than 70% of a project's cost. State Funding Assistance can only be applied to major school construction projects. Site acquisition and minor improvements are not eligible to receive funding assistance from the State. Because availability of Funding Assistance has not been able to keep pace with the rapid enrollment growth occurring in many of Washington's school districts, matching

funds from the State may not be received by a school district until after a school has been constructed. In such cases, the District must “front fund” a project. That is, the District must finance the complete project with local funds (the future State’s share coming from funds allocated to future District projects). When the State share is finally disbursed (without accounting for escalation) the future District project is partially reimbursed.

Because of the method of computing Funding Assistance, the official percentage of funding assistance calculated by the State does not typically equal the actual percentage of total facility cost. The Funding Assistance Percentage for Mount Vernon is approximately 71.13%. Notably, this only applies to costs that the State considers eligible for state funding assistance. Land costs and other development costs are not considered eligible for funding assistance. Furthermore, the State allows 90 square feet per elementary student while the District model is 120 square feet. This additional space must be funded with local dollars. For a typical project that has maximum State funding, less than 50% of the total project costs will be covered by state funding assistance. At this time, the District does qualify for State Funding Assistance for some of the new capacity projects identified in this Plan.

School Impact Fees

Development impact fees have been adopted by a number of jurisdictions as a means of supplementing traditional funding sources for construction of public facilities needed to accommodate new development. School impact fees are generally collected by the permitting agency at the time building permits or certificates of occupancy are issued.

Fees assessed are based on the new enrollment growth in the District. By law, new development cannot be assessed impact fees to correct existing deficiencies.

Impact fees have been calculated utilizing the formula in Skagit County Ordinance No. 15432 and in accordance with Mount Vernon Ordinance No. 2552. The resulting figures are based on the District’s cost per dwelling unit to purchase land for school sites, make site improvements, construct schools and purchase, install or relocate temporary facilities (Portables). Credits have also been applied in the formula to account for any State Funding Assistance anticipated to be reimbursed to the District and projected future property taxes to be paid by the owner of a dwelling unit.

The District’s cost per dwelling unit is derived by multiplying the cost per student by the applicable student generation rate per dwelling unit. The student generation rate is the average number of students generated by each housing type -- in this case, single family dwellings and multi-family dwellings. The District hired a consultant to conduct an analysis of the actual number of students being generated from new development within the District. Student generation rates for the District are shown on Table 10. See also Appendix C.

Table 10 – Student Generation Rates

| | Elementary | Middle Level | High School | TOTAL |
|---------------|-------------------|---------------------|--------------------|--------------|
| Single Family | .179 | .086 | .108 | .373 |
| Multi-Family | .036 | .018 | .000 | .055 |

(Source: 3Square Blocks, December 2016)

Table 11 – Proposed Impact Fee Schedule

| Housing Type | Impact Fee Per Unit |
|---------------------|----------------------------|
| Single Family | \$ <u>9,421</u> ____ |
| Multiple Family | \$ <u>1,134</u> ____ |

Table 12 – Impact Fee Variables Table – Mount Vernon School District

| Criteria | Elementary | Middle | High* |
|--|-------------------|---------------|--------------|
| <i>Site Acquisition Cost Element</i> | | | |
| Site Size (acres) | | | |
| Average Land Cost Per Acre | | | |
| Total Land Cost | | | |
| Additional Land Capacity | 0 | 0 | 0 |
| Student Factor | | | |
| Single Family | 0.179 | 0.086 | 0.108 |
| Multiple Family | 0.036 | 0.018 | 0.000 |
| <i>School Construction Cost Element</i> | | | |
| New Capacity | 550 | 240 | 436 |
| Current Permanent Facility Square Footage | 325,914 | 139,229 | 256,942 |
| Percentage Permanent to Relocatable | 92.82 | 97.48 | 95.97 |
| Estimated New Capacity Construction Cost | \$42,000,000 | \$9,600,000 | \$21,800,000 |
| <i>Relocatable Facilities Cost Element</i> | | | |
| Relocatable Facilities Cost | \$0 | \$0 | \$0 |
| Relocatable Facilities Capacity/Unit | 25 | 32 | 32 |
| Existing Portable Square Footage | 25,200 | 3,600 | 10,800 |
| Percentage Relocatable to Permanent | 7.18 | 2.52 | 4.03 |
| <i>State Funding Assistance Credit</i> | | | |
| Construction Cost Allowance | \$213.23 | \$213.23 | \$213.23 |
| School Space per Student (OSPI) | 90 | 108 | 130 |
| State Funding Assistance Percentage | 71.13% | 0% | 0% |
| <i>Tax Payment Credit</i> | | | |
| Interest Rate | 3.50% | 3.50 | 3.50 |
| Loan Payoff (Years) | 10 | 10 | 10 |
| Levy Rate | 2.24 | 2.24 | 2.24 |
| SF Average Assessed Value | \$230,002 | \$230,002 | \$230,002 |
| MF Average Assessed Value | \$80,647 | \$80,647 | \$80,647 |

Appendix A
Impact Fee Calculation

Appendix B
OSPI Enrollment Projections



ICOS

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

Skagit/Mount Vernon(29320)

| Grade | --- ACTUAL ENROLLMENTS ON OCTOBER 1st --- | | | | | | AVERAGE % SURVIVAL | --- PROJECTED ENROLLMENTS --- | | | | | |
|----------------------------|---|--------------|--------------|--------------|--------------|--------------|-----------------------|-------------------------------|--------------|--------------|--------------|--------------|--------------|
| | 2011 | 2012 | 2013 | 2014 | 2015 | 2016 | | 2017 | 2018 | 2019 | 2020 | 2021 | 2022 |
| Kindergarten | 509 | 537 | 518 | 547 | 517 | 482 | | 502 | 497 | 492 | 488 | 483 | 478 |
| Grade 1 | 506 | 512 | 539 | 518 | 562 | 513 | 100.58% | 485 | 505 | 500 | 495 | 491 | 486 |
| Grade 2 | 480 | 495 | 500 | 524 | 517 | 548 | 97.99% | 503 | 475 | 495 | 490 | 485 | 481 |
| Grade 3 | 480 | 462 | 489 | 477 | 531 | 515 | 98.27% | 539 | 494 | 467 | 486 | 482 | 477 |
| Grade 4 | 456 | 450 | 465 | 478 | 476 | 526 | 98.19% | 506 | 529 | 485 | 459 | 477 | 473 |
| Grade 5 | 499 | 441 | 433 | 454 | 475 | 459 | 97.27% | 512 | 492 | 515 | 472 | 446 | 464 |
| K-5 Sub-Total | 2,930 | 2,897 | 2,944 | 2,998 | 3,078 | 3,043 | | 3,047 | 2,992 | 2,954 | 2,890 | 2,864 | 2,859 |
| Grade 6 | 437 | 473 | 436 | 446 | 458 | 466 | 99.12% | 455 | 507 | 488 | 510 | 468 | 442 |
| Grade 7 | 403 | 434 | 458 | 435 | 462 | 447 | 99.41% | 463 | 452 | 504 | 485 | 507 | 465 |
| Grade 8 | 463 | 401 | 442 | 479 | 448 | 470 | 102.12% | 456 | 473 | 462 | 515 | 495 | 518 |
| 6-8 Sub-Total | 1,303 | 1,308 | 1,336 | 1,360 | 1,368 | 1,383 | | 1,374 | 1,432 | 1,454 | 1,510 | 1,470 | 1,425 |
| Grade 9 | 494 | 511 | 456 | 512 | 530 | 509 | 112.83% | 530 | 515 | 534 | 521 | 581 | 559 |
| Grade 10 | 455 | 485 | 515 | 453 | 502 | 556 | 100.24% | 510 | 531 | 516 | 535 | 522 | 582 |
| Grade 11 | 541 | 467 | 521 | 583 | 499 | 589 | 110.14% | 612 | 562 | 585 | 568 | 589 | 575 |
| Grade 12 | 634 | 660 | 589 | 666 | 684 | 617 | 123.38% | 727 | 755 | 693 | 722 | 701 | 727 |
| 9-12 Sub-Total | 2,124 | 2,123 | 2,081 | 2,214 | 2,215 | 2,271 | | 2,379 | 2,363 | 2,328 | 2,346 | 2,393 | 2,443 |
| DISTRICT K-12 TOTAL | 6,357 | 6,328 | 6,361 | 6,572 | 6,661 | 6,697 | | 6,800 | 6,787 | 6,736 | 6,746 | 6,727 | 6,727 |

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

Appendix C
District Enrollment Projections

Mount Vernon (October Headcount Enrollment)

| | Birth Year | | | | | | | | | | | | | | |
|------------------------|------------|--------|--------|--------|--------|--------|--------|--------|-------|-------|--------|--------|--------|--------|--------|
| | 1994 | 1995 | 1996 | 1997 | 1998 | 1999 | 2000 | 2001 | 2002 | 2003 | 2004 | 2005 | 2006 | 2007 | 2008 |
| Births | | | | | | | | | | | | | | | |
| Skagit County Births | 1273 | 1299 | 1293 | 1336 | 1367 | 1359 | 1396 | 1383 | 1373 | 1,356 | 1418 | 1451 | 1500 | 1,560 | 1628 |
| % of County Births (K) | 35.27% | 33.56% | 32.71% | 35.33% | 33.80% | 31.20% | 31.81% | 33.91% | 34.2% | 36.5% | 35.12% | 35.29% | 34.93% | 34.87% | 32.49% |
| Mount Vernon Births | 359 | 430 | 485 | 493 | 529 | 520 | 534 | 574 | 518 | 515 | 531 | 553 | 526 | 601 | 649 |
| % of Mt. Vernon | 125% | 101% | 87% | 96% | 87% | 82% | 83% | 82% | 91% | 96% | 94% | 93% | 100% | 91% | 82% |

| | October Enrollment History (OSPI 1999-2009) | | | | | | | | | | Enrollment From District (Excludes NCTA Enrollment) | | | | |
|-----|---|-------|-------|-------|-------|-------|-------|-------|-------|------------------|--|-------|-------|-------|-------|
| | 1999 | 2000 | 2001 | 2002 | 2003 | 2004 | 2005 | 2006 | 2007 | 2008 | 2009 | 2010 | 2011 | 2012 | 2013 |
| K | 449 | 436 | 423 | 472 | 462 | 424 | 444 | 469 | 469 | 495 | 498 | 512 | 524 | 544 | 529 |
| 1 | 467 | 488 | 482 | 446 | 501 | 490 | 443 | 460 | 481 | 492 | 487 | 516 | 518 | 527 | 551 |
| 2 | 475 | 453 | 448 | 453 | 417 | 473 | 480 | 425 | 445 | 493 | 477 | 499 | 492 | 507 | 517 |
| 3 | 453 | 459 | 450 | 433 | 462 | 425 | 458 | 460 | 413 | 454 | 504 | 492 | 492 | 475 | 507 |
| 4 | 452 | 436 | 460 | 440 | 442 | 470 | 443 | 475 | 469 | 443 | 455 | 508 | 465 | 463 | 479 |
| 5 | 376 | 459 | 443 | 448 | 417 | 440 | 473 | 420 | 454 | 489 | 437 | 472 | 509 | 448 | 446 |
| 6 | 423 | 382 | 455 | 424 | 450 | 429 | 446 | 474 | 418 | 448 | 487 | 446 | 451 | 486 | 450 |
| 7 | 401 | 425 | 389 | 427 | 415 | 436 | 421 | 442 | 476 | 427 | 447 | 483 | 416 | 457 | 471 |
| 8 | 375 | 393 | 425 | 380 | 434 | 413 | 441 | 428 | 446 | 473 | 424 | 462 | 483 | 419 | 463 |
| 9 | 589 | 457 | 462 | 592 | 547 | 505 | 476 | 496 | 455 | 507 | 527 | 472 | 505 | 533 | 468 |
| 10 | 424 | 531 | 508 | 507 | 491 | 478 | 486 | 479 | 491 | 452 | 501 | 502 | 457 | 495 | 527 |
| 11 | 395 | 396 | 429 | 388 | 422 | 439 | 408 | 452 | 438 | 431 | 415 | 449 | 464 | 408 | 460 |
| 12 | 259 | 292 | 320 | 320 | 301 | 344 | 403 | 380 | 448 | 438 | 445 | 442 | 459 | 505 | 460 |
| Tot | 5538 | 5,607 | 5,694 | 5,730 | 5,761 | 5,766 | 5,822 | 5,860 | 5,903 | 6,042 | 6,104 | 6,255 | 6,235 | 6,267 | 6,328 |
| | | | | | | | | | | Change from 2000 | 648 | | | | |
| | | | | | | | | | | Percentage | 11.6% | | | | |
| | | | | | | | | | | Annual | 1.2% | | | | |

| Growth | Change | 69 | 87 | 36 | 31 | 5 | 56 | 38 | 43 | 139 | 62 | 151 | -20 | 32 | 61 | |
|---------|---------|------|------|------|------|------|------|------|------|------|------|------|-------|------|------|------|
| Percent | Percent | 1.2% | 1.6% | 0.6% | 0.5% | 0.1% | 1.0% | 0.7% | 0.7% | 2.4% | 1.0% | 2.5% | -0.3% | 0.5% | 1.0% | |
| Totals | K-6 | 3095 | 3113 | 3161 | 3116 | 3151 | 3151 | 3187 | 3183 | 3149 | 3314 | 3345 | 3445 | 3451 | 3450 | 3479 |
| by | 7-8 | 776 | 818 | 814 | 807 | 849 | 849 | 862 | 870 | 922 | 900 | 871 | 945 | 899 | 876 | 934 |
| Level | 9-12 | 1667 | 1676 | 1719 | 1807 | 1761 | 1766 | 1773 | 1807 | 1832 | 1828 | 1888 | 1865 | 1885 | 1941 | 1915 |

Medium Range Forecast (RECOMMENDED)

| 6 year Birth to K-Ratios | | | Projected Births | | | | | | | | | | | | | | | | | | | | |
|--------------------------|-------------|-------------|------------------|-------|-------|-------|-------|-------|-------|-------|-------|-------|-------|-------|-------|-------|-------|-------|-------|-------|-------|-------|-------|
| <u>Median</u> | <u>SD+1</u> | <u>SD-1</u> | 2009 | 2010 | 2011 | 2012 | 2013 | 2014 | 2015 | 2016 | 2017 | 2018 | 2019 | 2020 | 2021 | 2022 | 2023 | 2024 | 2025 | 2026 | 2027 | 2028 | |
| 34.93% | 36.16% | 33.71% | Only Births | 1534 | 1471 | 1453 | 1,473 | 1,482 | 1,490 | 1,498 | 1,508 | 1,517 | 1,527 | 1,536 | 1,546 | 1,556 | 1,566 | 1,576 | 1,585 | 1,595 | 1,608 | 1,620 | 1,632 |
| | | | % County | 33.5% | 33.5% | 35.0% | 35.0% | 35.0% | 35.0% | 35.3% | 35.3% | 35.3% | 35.3% | 35.3% | 35.5% | 35.5% | 35.5% | 35.5% | 35.5% | 35.5% | 35.5% | 35.5% | 35.5% |
| | | | City Births | 608 | 566 | 547 | 555 | 558 | 561 | 564 | 568 | 571 | 575 | 578 | 582 | 586 | 589 | 593 | 597 | 601 | 603 | 605 | 610 |
| 92.59% | 98.26% | 86.92% | | 84.6% | 87.2% | 93.0% | 93.0% | 93.0% | 93.0% | 93.7% | 93.7% | 93.7% | 93.7% | 93.7% | 94.2% | 94.2% | 94.2% | 94.2% | 94.2% | 94.5% | 94.9% | 94.9% | 94.9% |

| Rollup | Adjusted for K-12 Population Growth | | | | | Projections (Does NOT Include NCTA Students) | | | | | | | | | | | | | | | | | | | | |
|----------------|-------------------------------------|----------------|----------------|----------------|----------------|--|------------------|-------|-------|-------|-------|------|------------------|------|------|------|------|-------|------|------|------|------|------|------|------|------|
| | <u>Used</u> | <u>2014-15</u> | <u>2016-20</u> | <u>2021-25</u> | <u>2026-33</u> | 2014 | 2015 | 2016 | 2017 | 2018 | 2019 | 2020 | 2021 | 2022 | 2023 | 2024 | 2025 | 2026 | 2027 | 2028 | 2029 | 2030 | 2031 | 2032 | 2033 | |
| 35.4% | 0.960 | 1.002 | 1.010 | 1.015 | | K | 514 | 493 | 509 | 516 | 519 | 522 | 524 | 532 | 535 | 539 | 542 | 545 | 552 | 555 | 559 | 562 | 566 | 570 | 574 | 579 |
| 1.017 | 1.000 | 1.009 | 1.012 | 1.012 | | 1 | 538 | 523 | 506 | 522 | 529 | 532 | 535 | 540 | 547 | 551 | 554 | 558 | 561 | 568 | 571 | 575 | 578 | 582 | 586 | 591 |
| 0.981 | 1.000 | 1.009 | 1.012 | 1.012 | | 2 | 541 | 528 | 518 | 501 | 517 | 524 | 527 | 535 | 540 | 548 | 551 | 555 | 554 | 557 | 564 | 567 | 571 | 574 | 578 | 582 |
| 0.999 | 1.000 | 1.009 | 1.012 | 1.012 | | 3 | 516 | 540 | 532 | 522 | 505 | 521 | 528 | 535 | 544 | 549 | 557 | 560 | 560 | 560 | 563 | 570 | 573 | 577 | 580 | 584 |
| 1.005 | 1.000 | 1.009 | 1.012 | 1.012 | | 4 | 509 | 519 | 547 | 539 | 529 | 512 | 528 | 532 | 540 | 548 | 553 | 561 | 569 | 570 | 569 | 573 | 579 | 583 | 586 | 590 |
| 0.995 | 1.000 | 1.004 | 1.012 | 1.012 | | 5 | 477 | 507 | 518 | 547 | 539 | 528 | 511 | 533 | 538 | 546 | 555 | 559 | 565 | 573 | 574 | 573 | 577 | 583 | 587 | 591 |
| 0.993 | 1.000 | 1.004 | 1.013 | 1.013 | | 6 | 443 | 473 | 505 | 516 | 545 | 537 | 527 | 511 | 533 | 538 | 545 | 554 | 562 | 568 | 577 | 577 | 576 | 580 | 586 | 590 |
| 0.990 | 1.000 | 1.004 | 1.013 | 1.013 | | 7 | 445 | 438 | 470 | 502 | 513 | 541 | 533 | 527 | 511 | 533 | 538 | 546 | 555 | 564 | 570 | 578 | 578 | 581 | 588 | |
| 1.007 | 1.000 | 1.004 | 1.013 | 1.013 | | 8 | 475 | 449 | 443 | 475 | 508 | 519 | 548 | 544 | 537 | 521 | 544 | 549 | 557 | 567 | 575 | 581 | 590 | 590 | 590 | 593 |
| 1.114 | 1.000 | 0.999 | 1.007 | 1.004 | | 9 | 516 | 529 | 499 | 493 | 529 | 565 | 578 | 614 | 609 | 602 | 584 | 610 | 614 | 623 | 634 | 644 | 650 | 660 | 660 | 660 |
| 0.981 | 1.000 | 0.999 | 1.007 | 1.004 | | 10 | 459 | 506 | 518 | 490 | 484 | 519 | 554 | 569 | 605 | 601 | 593 | 576 | 601 | 605 | 614 | 625 | 634 | 641 | 650 | 651 |
| 0.906 | 1.000 | 0.999 | 1.007 | 1.004 | | 11 | 477 | 416 | 458 | 469 | 443 | 438 | 470 | 506 | 520 | 552 | 548 | 542 | 524 | 546 | 550 | 558 | 568 | 577 | 583 | 591 |
| 1.034 | 1.000 | 0.999 | 1.007 | 1.004 | | 12 | 475 | 493 | 430 | 473 | 484 | 457 | 452 | 499 | 538 | 552 | 587 | 583 | 562 | 543 | 567 | 571 | 579 | 590 | 599 | 605 |
| | | | | | | Tot | 6,386 | 6,414 | 6,454 | 6,565 | 6,642 | 6714 | 6813 | 6977 | 7097 | 7180 | 7252 | 7296 | 7336 | 7399 | 7486 | 7553 | 7620 | 7684 | 7741 | 7794 |
| | | | | | | | Change from 2010 | | | | | 558 | Change from 2020 | | | | | 807 | | | | | | | | |
| | | | | | | | Percentage | | | | | 8.9% | Percentage | | | | | 11.8% | | | | | | | | |
| | | | | | | | Annual | | | | | 0.9% | Annual | | | | | 1.2% | | | | | | | | |
| Change | 58 | 28 | 40 | 111 | 78 | 72 | 99 | 164 | 120 | 82 | 72 | 45 | 40 | 63 | 87 | 67 | 67 | 64 | 57 | 53 | | | | | | |
| Percent | 0.9% | 0.4% | 0.6% | 1.7% | 1.2% | 1.1% | 1.5% | 2.4% | 1.7% | 1.2% | 1.0% | 0.6% | 0.5% | 0.9% | 1.2% | 0.9% | 0.9% | 0.8% | 0.7% | 0.7% | | | | | | |
| K-6 | 3538 | 3583 | 3636 | 3663 | 3681 | 3675 | 3679 | 3719 | 3777 | 3818 | 3857 | 3892 | 3924 | 3951 | 3976 | 3996 | 4020 | 4049 | 4079 | 4107 | | | | | | |
| 7-8 | 920 | 887 | 913 | 977 | 1021 | 1060 | 1081 | 1071 | 1048 | 1055 | 1082 | 1094 | 1112 | 1131 | 1145 | 1159 | 1168 | 1168 | 1171 | 1181 | | | | | | |
| 9-12 | 1928 | 1944 | 1905 | 1925 | 1940 | 1979 | 2053 | 2188 | 2272 | 2307 | 2313 | 2310 | 2300 | 2317 | 2365 | 2397 | 2432 | 2467 | 2492 | 2506 | | | | | | |

*The District reconfigured grade levels in 2014 to K-5, 6-8, and 9-10. The totals above reflect K-6 and 7-8 but may be manually adjusted.

Appendix D
Student Generation Rate Methodology



Memorandum

Date: December 15, 2016

To: Dr. Carl Bruner, Superintendent, Mount Vernon School District
Carol Ledin, Superintendent's Assistant, Mount Vernon School District

From: Julia Walton, Principal, 3 Square Blocks
Casey Bradfield, Associate Planner, 3 Square Blocks

Re: Findings – Student Generation Rates

This memorandum contains findings for the Mount Vernon School District's 2016 student generation rates.

The methodology used to produce these rates is consistent with the methodology previously developed by consultant Mike McCormick and successfully applied for a number of school districts in Western Washington, including the Mount Vernon School District. The rates were calculated for single-family development and multi-family development.¹ The study area included all land within the Mount Vernon School District. The analysis used data on current student addresses, single-family residential development built within the study area from 2011 through 2015, and multi-family residential development built within the study area from 2008 through 2015.² The primary sources of information were the Mount Vernon School District and Skagit County Assessor.³

The analysis involved comparing student street addresses with residential development street addresses to identify matches where current students were living in recently built housing units in the study area. The data was broken out to show the number of student matches per grade grouping for each type of residential development. Student generation rates were calculated by dividing the number of student matches by the number of housing units built for each category. The resulting findings are presented in the summary table on the following page.

¹ For the purposes of this analysis, single-family development was defined to include single family homes, mobile homes and accessory dwelling units. Multi-family development was defined to include residential development containing more than one housing unit, such as duplexes, condos, townhomes and apartments.

² We typically use data on residential development from the most recent five-year period to calculate student generation rates. The multi-family development data for the District from 2011 through 2015 contained one apartment development, Villa San Isidro, with a much higher rate of students to units than is typical for the District. This development was treated as an outlier and removed from the dataset. There were an insufficient number of new housing units in the updated dataset to calculate multi-family student generation rates. For this reason, the dataset was expanded to years 2008 through 2015. This is consistent with how the District last calculated multi-family student generation rates, in 2012.

³ The data provided by the District contained the grade and street address for each student in the District based on fall 2016 enrollment data. The data provided by the Skagit County Assessor contained information for all single-family residential housing units constructed within the study area from 2011 through 2015, and all multi-family residential units built from 2008 through 2015, including the year built, improvement type, number of units, street address and parcel number.

Table 1. 2016 Mount Vernon School District Student Generation Rates

| | Single-Family | Multi-family |
|---------------------------------|----------------------|---------------------|
| Student Generation Rates | | |
| Elementary (K through 5) | 0.179 | 0.036 |
| Middle School (6 through 8) | 0.086 | 0.018 |
| High School (9 through 12) | 0.108 | 0.000 |
| Total | 0.373 | 0.055 |

Note: Totals may not balance due to rounding

Attachment: Mount Vernon School District 2016 Student Generation Rates Detail

Attachment 1: Mount Vernon School District 2016 Student Generation Rates Detail

| | Single-Family | Multi-family |
|---|----------------------|---------------------|
| Student Generation Rates | | |
| Elementary (K through 5) | 0.179 | 0.036 |
| Middle School (6 through 8) | 0.086 | 0.018 |
| High School (9 through 12) | 0.108 | 0.000 |
| Total | 0.373 | 0.055 |
| New Housing Units Built in the District | | |
| Single-Family (2011-2015) | 638 | NA |
| Multi-Family (2008-2015) | NA | 55 |
| Students Living at the Housing Units, In Fall 2016 | | |
| Kindergarten | 24 | 0 |
| Grade 1 | 20 | 0 |
| Grade 2 | 27 | 2 |
| Grade 3 | 10 | 0 |
| Grade 4 | 19 | 0 |
| Grade 5 | 14 | 0 |
| Grade 6 | 22 | 1 |
| Grade 7 | 18 | 0 |
| Grade 8 | 15 | 0 |
| Grade 9 | 24 | 0 |
| Grade 10 | 17 | 0 |
| Grade 11 | 18 | 0 |
| Grade 12 | 10 | 0 |
| Elementary Total (K through 5) | 114 | 2 |
| Middle School Total (6 through 8) | 55 | 1 |
| High School Total (9 through 12) | 69 | 0 |
| Total (All Grades) | 238 | 3 |