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Tustin Unified School District

FEE JUSTIFICATION REPORT

For Residential & Commercial/Industrial Development

April 2022

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EXECUTIVE SUMMARY

This Fee Justification Report (“Report”) for Residential and Commercial/Industrial Development has been prepared by Special District Financing & Administration (“SDFA”) for the purpose of identifying the impact of projected future development on the school facilities of the Tustin Unified School District (“TUSD” or “District”), the ability of the District’s current facilities to accommodate the impact, and the extent to which projected demand exceeds the District’s current facilities capacity as well as quantify the costs associated with meeting the increased demand.

Specifically, this Report is intended to provide the Board of Education of the District with the required information to make the necessary findings set forth in Government Code Section 66001 et seq. and in accordance with Government Code Section 65995 et. seq, to support the District’s collection of its fair share of the statutory fees allowed by the State of California, which for unified districts (K-12) is currently \$4.79 per square foot of new residential development and \$0.78 per square foot of new commercial/industrial development. The TUSD is a unified school district providing school facilities to elementary and secondary students living within the cities of Irvine, Santa Ana and Tustin as well as small portions of unincorporated areas within the County of Orange.

The findings contained in this Report include the following:

- *In accordance with state classroom loading standards, the District currently has school capacity to house approximately 22,278 students.*
- *Current enrollment, including Special Day Class students, is approximately 22,038 students resulting in an aggregate capacity surplus of 240 seats.*
- *At least 4,104 new dwelling units could be constructed during the next twenty years within the boundaries of the school district and for which no provision to mitigate the impact of their development through participation in a community facilities district, a negotiated fee payment or some other mitigation measure (“Mitigated Developments”) has been made.*
- *Future development of single-family housing is largely expected to occur within the District’s remaining mitigated developments (i.e., Orchard Hills and Tustin Legacy) and almost all future unmitigated development will consist of multi-family housing and the District’s student generation rates indicate that almost one and one-half elementary, one middle, and one high school student is generated from every ten multi-family (“MF”) dwelling units constructed.*

- *At least one elementary school and almost sixty percent (60%) of a Grade 6-12 school facility will need to be constructed in order to provide adequate facilities to house students to be generated from currently unmitigated developments which lie within the boundaries of the District. The estimated cost of these school facilities, excluding interim housing requirements and central administrative support, is over \$89 million dollars.*
- *Taking into account the cost of interim housing and administrative support, the total cost of school facilities results in a cost of approximately \$78,661 per elementary student and \$140,919 per school student in grades 6-12. The estimated school facilities cost per dwelling unit is approximately \$22,695.*
- *Based on development plans for projects within the Cities of Irvine, Santa Ana and Tustin, the District estimates that the average size of future residential dwelling units to be constructed within the TUSD will be approximately 1,456 square feet. Based upon the average square footage, the District would need to collect approximately \$15.59 per square foot of new residential development to mitigate the school facilities impacts. This amount is well in excess of the amount that may be currently collected by the District (i.e., the District's maximum fee amount is \$4.79 per square foot) and permitted by state statute. Thus, the District is justified in collecting the statutory fees for residential development as permitted by state law.*
- *Utilizing estimates regarding employee generation and associated residential household generation gleaned from recent Census data, it was determined that the District would need to collect between \$0.33 and \$52.54 per square foot of commercial/industrial development to mitigate the gross school facilities impacts resulting from all new non-residential development. This amount is well in excess of the amount currently collected by the District (i.e., the District's maximum fee amount is \$0.78 per square foot) and permitted by state statute. Thus, the District is justified in collecting \$0.33 per square foot for new self-storage development and the District is justified in collecting the maximum statutory fee of \$0.78 per square foot for all other commercial/industrial development as permitted by state law.*
- *Absent additional state or local funding, the District will not be able to provide adequate school facilities for new residential, commercial or industrial developments that are constructed within the boundaries of the District and for which no additional mitigation is received.*

Section

One

INTRODUCTION

This Section of the Report sets forth the legislative requirements as well as the methodology and data sources utilized in the analysis of the District's school facilities impact. Also included in this Section is a brief description of the TUSD, its current student enrollment and its current capacity.

The Tustin Unified School District

The TUSD is a political subdivision of the State of California and encompasses more than twenty-four (24) square miles in central Orange County and includes almost all of the territory within the boundaries of the City of Tustin as well as portions of the cities of Irvine and Santa Ana as well as an unincorporated area known as Tustin Foothills located primarily in the northern portion of the District. Its western boundary includes portions of Santa Ana with the portion of the western boundary line that lies north of Interstate 5 running along Marbury and Wright Streets and the portion that lies south of the Interstate largely coterminous with Lyon Avenue. Its southern boundary line runs along Warner Avenue on both the west and east areas of the District with the central portion of the district's southern boundary (between Armstrong and Jamboree) extending south to McGaw Avenue. The eastern boundary of the District is coterminous with Jamboree Road south of Interstate 5 and then is represented by Culver Drive north of Interstate 5 with the boundary line extending north of Portola Parkway into the area known as Orchard Hills (Planning Area No. 1 of the City of Irvine). The eastern portion of the District's northern boundary lies adjacent to Peters Canyon Regional Park and then follows along a number of residential streets in the Tustin Foothills on the west side of the District.

The TUSD is a geographically small, unified (K-12) school district that primarily serves an urban population with an enrollment of over 22,000 students housed in twenty-nine different schools, including sixteen elementary, two K-8 schools, four middle schools (grades 6-8), three comprehensive high schools, one 6-12 academy, one alternative education school and one continuation school. The District serves a diverse ethnic population that includes more than 100,000 people in the cities of Irvine, Tustin and Santa Ana as well as the unincorporated area known as the Tustin Foothills.

Synopsis of District Growth & Student Capacity

During the past three decades, the District has experienced significant student growth as well as accompanying demographic changes both in terms of ethnicity and economic diversity. Recently, over the past few years the District experienced a decline in enrollment which has been exacerbated by COVID-19. With the development of Tustin Ranch, Lower Peter's Canyon, MCAS/Legacy and Orchard Hills master-planned communities, as well as recent approvals of other specific plans as identified in the most recent Housing Element of the General Plan for the City of Tustin and Santa Ana, the District expects a significant number of new residential units to be constructed within the District creating additional students.

Student enrollment for 2021/22 by school type is as follows:

Table 1

FY 2021/22 Student Enrollment

School Type	CSIS Enrollment ⁽¹⁾
Elementary School (Grades K-6)	9,110
Middle School (Grades 7-8)	5,045
High School (Grades 9-12)	7,883
Total 2021/22 Enrollment	22,038

(1) Reflects the District's CSIS enrollment figures for FY 2021/22 for grades TK-12 including Special Day Class pupils.

Current enrollment figures show that the total student population is 22,400 students. For purposes of calculating current capacity under the School Facilities Program the District relies on capacity computations as summarized on its School Capacity Study worksheet, attached as Appendix "A". This worksheet indicates that the District's current school facilities are sufficient to house 8,950 elementary, 5,564 middle, and 7,763 high school students or a total of 22,278 pupils. A comparison of current student enrollment to current capacity demonstrates that the District currently has insufficient facilities to adequately house its current enrollment at both elementary and high school levels with approximately ten classrooms of excess capacity at the middle school level. While there may be some short-term surplus capacity at various sites, with the pending build-out of the Orchard Hills Development (which has already mitigated its obligation via the funding and construction of the Orchard Hills K-8 facility located in CFD No. 14-1), any current surplus seats in the District will likely be absorbed as additional students from CFD 14-1 are generated.

Based upon the most recent population and housing estimates and trends as indicated by recent census data and corroborated by recent development within the District, it is anticipated that the growth experienced by the District during the past decade is likely to continue in the near future with the redevelopment of the Marine Corps Air Base (MCAS). Specifically, the current housing estimate for Tustin indicates that future housing units will be constructed within the Legacy, Redhill and Downtown Commercial Core Specific Plan areas. Santa Ana's housing element indicates that the Metro-East Overlay Zone is the primary area of future development within the City that also lies within the jurisdictional boundaries of the TUSD. Thus, as the District's current facilities are inadequate to house *all* of the additional students beyond its current enrollment and the future dwelling units to be constructed within Mitigated Developments, additional facilities

must be added to provide some incremental capacity for students that will be generated from new non-mitigated development.

During the past thirty-two years the District and the development community have entered into various mitigation agreements in order to ensure the timely construction of school facilities to house students from new development (Mitigated Development). The primary financing mechanism authorized in the mitigation agreements is the formation of a community facilities district (CFD). The District can then issue bonds to construct school facilities with repayment of the bonds being accomplished through the levy of a special tax on properties within the CFDs. These developments that are subject to the special tax are considered Mitigated Developments as they have provided significant funding and support to the TUSD facilities program since 1989. Nevertheless, increased student generation within existing developments as well as new residential construction for which a mitigation agreement does not exist continues to cause the District to operate with inadequate school facilities.

Legislative History

School districts have historically relied upon state funds and local bond measures to provide funding for the acquisition and construction of new school facilities. Prior to the passage of Proposition 13 in 1978, a school district's share of local property taxes was typically sufficient to build necessary schools to accommodate new development. The rapid increase in real estate prices within California during the 1970's and 1980's ensured that revenues would expand as the "ad valorem" tax base grew. However, limitations on the growth of this funding source were significantly constrained by the passage of Proposition 13, which limited annual increases in assessed values, except in the case of ownership transfers, to two percent (2%). This action, combined with a compounding need for new construction monies, caused significant hardships in many school districts during the early 1980's.

In 1986 the state legislature attempted to address this funding shortfall through the enactment of Assembly Bill 2926 ("School Fee Legislation"), which provided for the imposition of development fees on new residential and commercial/industrial construction. The School Fee Legislation provides that development fees are to be collected prior to the issuance of a building permit. Furthermore, no city or county is authorized to issue a building permit for new residential or commercial/industrial projects unless it first certifies with the appropriate school districts that the developer of the project has complied with the development fee requirement.

Shortly thereafter, AB 1600 ("Mitigation Fee Act") was enacted by the state legislature and took effect on January 1, 1989. Government Code Section 66001 and following sets forth the requirements for establishing, imposing and increasing development fees initially authorized under AB 2926. Specifically, the Mitigation Fee Act requires that a reasonable relationship or "nexus" exist between the type and the amount of a development fee imposed and the cost of the benefit to be derived from the fee. Specifically, Section 66001 of the Government Code with respect to the imposition of development fees provides, in pertinent part, that any action establishing, increasing, or imposing a fee on new development shall do all the following:

- *Identify the purpose of the fee.*

- *Identify the use to which the fee is to be put.*
- *Determine how there is a reasonable relationship between the fee's use and the type of development project on which the fee is imposed.*
- *Determine how there is a reasonable relationship between the need for the public facility and the type of development project on which the fee is imposed.*

The development fees are currently authorized under Education Code Section 17620 and are \$4.79 per square foot of new residential construction and \$0.78 per square foot of new commercial/industrial development (for K-12 school districts). These development fees may next be increased by the SAB in 2024 and every two years thereafter.

In June of 2006, Assembly Bill 2751 was passed which added the criteria that a fee is prohibited from including the cost attributable to existing deficiencies in public facilities. In the case of a school district, this would mean that existing capacity deficits could not be added to the facilities funding required from future development. In this Report, this is demonstrated in the calculations by not including any deficit which would be shown in Table II, if any, to the School Facilities Required for New Development (Unmitigated) (Table X) or to the cost of such school facilities (Tables XII, XIII and XIV).

Methodology

In order to determine the impact of new construction on TUSD facilities the relationship between the new construction and its impact on the demand for school facilities must be identified. For residential development this determination includes the following:

- *Projecting the number of future residential dwelling units to be constructed within TUSD boundaries.*
- *Calculating a student generation rate (i.e., students expected to be generated from each new home) for the future dwelling types expected to be constructed in the future.*
- *Determining the number of students to be generated from new development.*
- *Identifying the "per student cost" for new elementary, middle and high school facilities.*
- *Multiplying the per student costs for elementary, middle and high school facilities by the applicable student generation rate.*

The methodology for determining the impact of new commercial/industrial development is similar. However, instead of determining the number of students to be generated per new dwelling unit, the focus is on the number of students generated per employee.

This Report utilizes in part, employee generation factors derived from the Traffic Generator's Guide prepared by the San Diego Association of Governments (SANDAG), last updated in April of 2002, as well as certain census data compiled by the U.S. Census Bureau.

Data Sources

The primary information used to establish a nexus between new development and school facilities impacts includes residential housing projections, employment impacts from new commercial/industrial development, historical student generation rates and facilities cost estimates. Primary information sources regarding future housing projections includes preliminary data for the Legacy Project gleaned from the Specific Plan for the Marine Corps Air Station (MCAS) as well as planning and current project documents obtained from the cities of Irvine, Santa Ana and Tustin. Data for determining commercial/industrial impacts was derived from the Traffic Generators Guide prepared by SANDAG as well as 2006-2010 Census Data for the cities of Irvine, Tustin and Santa Ana. Student generation rates for this Report were calculated by SDF. Equal Employment Opportunity Commission (EEOC) worksite data derived from the American Community Survey (2006-10) conducted by the US Census Bureau was utilized to determine school facilities impacts associated with new non-residential development. Facilities cost estimates were prepared using cost information obtained from the District's Facilities Department.

Section
Two

RESIDENTIAL DEVELOPMENT

This Section of the Report identifies the school facilities impact from new residential construction.

Existing Facilities Capacity and Current Enrollment

Prior to examining the school facilities impacts from new development, the District's current capacity and enrollment were reviewed to identify existing facilities that may be available to house future students. As shown in Appendix "A" (School Capacity Worksheet), the District has determined that its existing school building capacity is approximately 22,278 elementary, middle and high school seats. As shown in Table I, CSIS enrollment figures for 2021/22 include 22,038 students. The resulting capacity deficit is shown in Table II.

*Table II
Existing School Facilities Capacity*

School Type	2021/22 Capacity ⁽¹⁾	2021/22 Enrollment ⁽²⁾	Existing Capacity Surplus
Elementary (K-5)	8,951	9,110	0
Middle (6-8)	5,564	5,045	519
High (9-12)	7,763	7,883	0
Aggregate	22,278	22,038	519

(1) Includes Permanent Facilities & Interim Facilities.

(2) Consistent with current District educational program policies, the District's sixth graders are predominantly attending the District's middle schools. Thus, for determining the facilities impact from future development and future school design goals, the District will assume that sixth grade students generated from future unmitigated development will continue to be housed at middle school facilities.

Future Residential Unit Projections

In the summer of 2005, the District entered into a mitigation agreement with the Irvine Company for the future development project known as Orchard Hills (Planning Area No. 1), which is primarily located northwest of the intersection of Culver Drive and Portola Parkway in the City of Irvine. And in the fall of 2015, TUSD completed its negotiations with the City Tustin related to the redevelopment of the remaining portion of the Tustin Marine Corps Air Station (MCAS). Both of these projects are expected to generate a significant number of students that must be housed in school facilities provided by the District but as a result of successful negotiations, their anticipated facilities impacts will be met through the formation of two CFDs and the issuance of bonds to construct facilities to serve their communities.

As a result, the anticipated student impacts from these communities at grades kindergarten through twelfth (K-12) are excluded from this analysis, so that only the net impact from unmitigated developments that will be subject to statutory fees will be considered.

Thus, for purposes of this analysis, the District’s projection of future housing that is not yet mitigated consists primarily of (i) underdeveloped property located north of McGaw Avenue between Armstrong and Jamboree Road which is referred to as the IBC (Irvine Business Center), (ii) the Metro-East Overlay Zone located in the City of Santa Ana and (iii) future “in-fill” developments within the City of Tustin. The District has not incorporated in its estimate a significant number of future dwelling units expected from currently unidentified in-fill development. This estimate is summarized in Table III and is also included in Appendix “C”.

*Table III
Projected Future Residential Units located within Unmitigated Developments ⁽¹⁾*

Jurisdiction	Single-Family Detached (SFD) Dwelling Units	Single-Family Attached (SFA) Dwelling Units	Multi-Family Apartment Dwelling Units	Total Future Dwelling Units
City of Irvine (IBC)	0	164	0	164
City of Santa Ana	24	678	678	1,380
City of Tustin	0	1,280	1,280	2,560
Unincorporated	0	0	0	0
Total for TUSD	24	2,122	1,958	4,104

(1) Future Planned Residential Projects without Mitigation as identified in planning documents or as estimated by planning agencies responsible for approving projects located within the jurisdictional boundaries of TUSD.

As previously indicated, a significant number of future dwelling units will be constructed within master-planned communities which are considered Mitigated Developments because they have already mitigated their school impacts through the formation of a community facilities district. These units are considered part of Mitigated Developments and therefore, both their impact on school facilities and their mitigation payments are excluded from the fee calculation in this Report.

Student Generation Rates

To establish a nexus between anticipated future residential development and a corresponding need for additional school facilities, the number of future students anticipated to be generated from the new residential development must be determined. This calculation often results in a student generation rate (“SGR”) or factor, which represents the number of students, or portion thereof, expected to attend District schools from each new house. While additional single-family and multi-family housing will be constructed in both Orchard Hills and in Tustin Legacy (MCAS), these two areas represent mitigated developments and are excluded from this report.

For purposes of estimating the school facilities impact expected from future development, the District utilized its student generation rates tabulated for single-family detached (SFD), single-family attached (SFA) and multi-family units (apartments) located within its CFDs (CFD Nos. 88-1, 97-1, 06-1, 07-1 and 14-1) as well as the City of Tustin’s CFD 14-1 – (Greenwood @ Legacy). Student generation rates for the District’s CFDs were computed in February of 2022 and a

summary of these generation rates is contained in Appendix “B”. The student generation rates for multi-family apartment units, single-family attached (SFAs) and single-family detached (SFDs) dwellings located within the District’s CFDs are summarized in Table IV.

*Table IV
Student Generation Rates for Residential Units Located in CFDs ⁽¹⁾⁽²⁾*

School Level	Multi-Family Units (Apartments)	Single-Family Attached (SFAs)	Single-Family Detached (SFDs)
Elementary (K-5) ⁽³⁾	0.1341	0.1449	0.2079
Middle (6-8) ⁽³⁾	0.0616	0.0860	0.1173
High (9-12)	0.0886	0.1195	0.1917
Aggregate	0.2843	0.3503	0.5170

- (1) Rounded to the nearest ten-thousandth.
- (2) The District believes that the SGRs identified above will produce the most reasonable estimate of additional students when applied to the District’s development projections. However, the District does acknowledge that the student generation rate derived on a district-wide basis is approximately 0.4800 (i.e., current enrollment of 22,374 / divided by 46,609 housing units) and is higher than what is indicated in Table IV when applied across all dwelling types.
- (3) For determining the facilities impact from future development and future school design goals, the District assume that sixth-grade students generated from future unmitigated development will continue to be housed at middle school facilities.

Students Generated by New Unmitigated Development

The number of students estimated to be generated from future Unmitigated Development is determined by multiplying the projected number of future unmitigated dwelling units (Table III) by the corresponding generation rates (Tables IV). This computation is reflected in Table V:

*Table V
Student Generation from Future Residential Dwelling Units*

School Level	Future MF (Apt) Units: <i>1,958</i>		Future SFA Dwellings: <i>2,122</i>		Future SFD Dwellings: <i>24</i>	
	MF Student Generation Rate	MF Future Students ⁽¹⁾	SFA Student Generation Rate	SFA Future Students ⁽¹⁾	SFD Student Generation Rate	SFD Future Students ⁽¹⁾
Elementary (K-5)	0.1341	263	0.1449	307	0.2079	5
Middle (6-8)	0.0616	121	0.0860	182	0.1173	3
High (9-12)	0.0886	174	0.1195	254	0.1917	5
Aggregate (K-12)	0.2843	558	0.3503	743	0.5170	13

- (1) Students shown are rounded to the nearest integer.

School Facilities Required to Serve New Development

In order to determine the number of schools, or portions thereof, necessary to serve students generated from new development, the aggregate future students shown in Table V is divided by the school capacity (i.e., design population). Table VI shows the number of new elementary, middle and high schools required to serve new development:

*Table VI
School Facilities Required for New Development (Unmitigated)*

School Facility	Future Students ⁽¹⁾	Less Available Capacity ⁽²⁾	Net Unhoused Students ⁽³⁾	Design Capacity	Required Facilities ⁽⁴⁾
Elementary School (K-5)	575	0	575	550	1.0455
Middle/High School (6-12)	739	399	340	1,200	0.2833

- (1) Represents total future students as shown in Table V.
- (2) While Table II indicates a current capacity surplus of 519 seats at the middle school level, these seats are attributable to the construction of the Legacy 6-12 school and 120 of these seats will be utilized to cure the existing capacity deficit of 120 seats at the high school level with the remaining 399 surplus seats available to house future 6-8 students.
- (3) Represents net future unhoused middle and high school pupils after allocation of 399 surplus seats.
- (4) Rounded to the nearest ten-thousandth.

Estimated School Facilities Costs

To calculate the cost for new school facilities, SDFRA relied on actual historical costs and current estimates of costs associated with the construction of recent school facilities. These numbers reflect the District’s estimate of land acquisition and construction costs, and also include anticipated costs for furniture, equipment and technology. Based on the District’s most recent transfer of property to the City of Tustin, the District has utilized a land cost of \$1.5 million per acre as the average acquisition price associated with providing future school facilities for future unmitigated development.

While there is still additional land at the Legacy school site that can be utilized to add capacity to house additional middle and high school pupils, the school site and surrounding area is within the boundaries of a CFD and is considered mitigated development. The current mitigation documents identify approximately 2,000 additional multi-family units to be constructed and the District believes that the students generated from these mitigated units will utilize any of the additional capacity that may be constructed at the Legacy school site. Thus, future Unmitigated Development will need to be housed at a currently unidentified school site which will still need to be acquired.

The estimated costs for elementary, middle and high school facilities are contained in Appendix “D”. The resulting facilities costs per school site, including acquisition and site development are shown in Table VII.

*Table VII
Estimated Facilities Costs per School Site*

School Facility	Site Acquisition/ Development	Construction ⁽¹⁾	Total Cost
Elementary (K-5)	\$16,000,000	\$25,000,000	\$41,000,000
Middle & High (6-12)	\$64,000,000	\$100,000,000	\$164,000,000

(1) Includes plans, tests and inspections, furniture and equipment, technology and other items.

The aggregate facilities cost impact from new, Unmitigated Development is determined by multiplying the per site costs shown in Table VII by the required number of sites reflected in Table VI. This resulting impact is shown in Table VIII.

*Table VIII
Estimated Facilities Costs (Excluding Interim Housing & Admin. Facilities)*

School Type	Required Schools ⁽¹⁾	Site Acquisition/ Development	Construction ⁽²⁾	Total Cost
Elementary (K-5)	1.0455	\$16,728,000	\$26,137,500	\$42,865,500
Middle & High (9-12)	0.2833	\$39,413,333	\$61,583,333	\$100,996,666
Aggregate		\$56,141,333	\$87,720,833	\$143,862,166

(1) Rounded to four decimals.

(2) Includes plans, tests and inspections, furniture and equipment, technology and other items.

Interim Housing and Administrative Support

In addition to the need for incremental permanent K-12 school facilities, new development imposes additional facilities impacts on school districts. Because development fees are collected at the time a building permit is issued, funds to provide facilities accumulate over a period of time and revenues, particularly when other local or state funds are not available, are not sufficient to build a school when development so warrants. The solution to this problem is most often addressed through “interim housing” in which the District purchases or leases relocatable classrooms that are used to temporarily alleviate overcrowding at existing school sites. Utilizing recent cost data associated with the setup and leasing of portables at its current sites, the TUSD has determined that it costs the District approximately \$3,212 per elementary, and \$3,352 per middle or high school student to provide interim housing until new facilities are available.

Additional central administrative facilities and support is also required as new students place incremental demands on school administration. The District has determined that \$900 for each new student is necessary to provide for corresponding central administrative facilities. The estimated total cost of interim housing and central administrative facilities is shown in Table IX.

*Table IX
Costs for Interim Housing & Administrative Support Facilities*

School Level	Future Students	Per Pupil Costs		Total Cost
		Interim Housing ⁽¹⁾	Administrative Support ⁽¹⁾	
Elementary (K-5)	575	\$3,212	\$900	\$2,364,400
Middle/High (6-8)	340	\$3,352	\$900	\$1,445,680
Aggregate	915	\$3,352	\$900	\$3,810,080

(1) Per Pupil costs estimates for interim Housing and administrative support are included in Appendix D-2..

Thus, the estimated total cost of school facilities (Table VIII) and ancillary facilities (Table IX) necessary to accommodate students generated from new residential development is shown in Table X:

*Table X
Total Estimated Facilities Costs*

School Type	School Facilities	Interim Housing ⁽¹⁾	Administrative Support ⁽¹⁾	Total Cost
Elementary (K-5)	\$42,865,500	\$1,846,900	\$517,500	\$45,229,900
Middle & High (6-12)	\$46,466,667	\$1,139,680	\$306,000	\$47,912,347
Aggregate	\$89,332,167	\$2,986,580	\$823,500	\$93,142,247

(1) Amounts shown are equal to the number of future students shown in Table IX multiplied by the respective estimated facilities costs included in Appendix D-1 and D-2.

Total Estimated Cost per Student

The estimated facilities cost for each elementary, middle and high school student is derived by dividing the school facilities costs by the respective number of students expected to be generated from new residential development. The per pupil costs for interim housing and administrative support (Table IX) are added to the per pupil school facilities cost to determine the total per student facilities costs for elementary, middle and high school facilities. The total estimated per pupil facilities cost is shown below:

*Table XI
Total Facilities Costs per Pupil*

School Level	Base School Facilities Cost	Unhoused Future Students	Per Pupil Costs ⁽¹⁾			
			School Facilities	Interim Housing	Administrative Support	Total Cost
Elementary (K-5)	\$42,865,500	575	\$74,549	\$3,212	\$900	\$78,661
Middle & High (6-12)	\$46,466,667	340	\$136,667	\$3,352	\$900	\$140,919
Weighted Average ⁽²⁾	\$89,332,167	915	\$97,631	\$3,291	\$900	\$101,795

(1) Rounded to the nearest dollar.

(2) Reflects a weighted average based upon anticipated number of unhoused K-5 and 6-12 pupils expected to be generated.

School Facilities Impact per Dwelling Unit

The total estimated facilities cost for each new residential unit is determined by multiplying the facilities costs per student (Table XI) by the applicable student generation rate (Table IV) and is shown in the following table:

Table XII
Total Facilities Costs per Residential Unit

Housing Type	Per Pupil Cost	Composite -Wtd Avg.	
		Student Generation Rate ⁽¹⁾	Facilities Cost Per Dwelling Unit ⁽²⁾
Elementary (K-5)	\$78,661	0.1401	\$11,021
Middle & High (6-12)	\$140,919	0.0829	\$11,674
Weighted Average	\$101,795	0.2230	\$22,695

(1) Rounded to the nearest ten-thousandth and the rate shown for 6-12 is the resulting net SGR after the allocation of 399 surplus seats to future development.

(2) Facilities costs per dwelling unit as shown differs slightly from the product of the Per Pupil Cost and the SGRs shown above because the Per Pupil Cost is, in part, derived from the number of students generated to the nearest whole integer.

The District estimates that the weighted average assessable space of future multi-family dwelling units constructed within the expected unmitigated development will be approximately 1,456 square feet. This figure incorporates the weighted average size of future dwelling units as identified in Appendix “C”. Dividing the total facilities cost per dwelling unit of \$22,695 by the average size of a dwelling unit yields a school facility cost of \$15.59 per square foot.

As previously indicated, the current statutory development fee authorized by Government Code Section 65995 (b)(1) for new residential construction is \$4.79 per square foot. Based on the District’s student generation rates, actual costs to provide school facilities and the average square footage for new dwelling units, the District, as outlined above, would need to levy an additional \$10.80 per square foot to actually provide the school facilities necessitated by new residential development. This Report demonstrates that the school facilities impact amount per square foot equals \$15.59 for future unmitigated residential development within the boundaries of the District. Thus, there is full justification for collecting the District’s share of the maximum statutory developer fee allowed of \$4.79 per square foot (K-12) of new residential development.

Since the District’s school facilities impact per square foot is greater than the maximum statutory fee allowed under Government Code Section 65995 (b)(1), the District actually suffers unmitigated impacts from new residential development, which not only supports the collection of the statutory development fee for residential developments, but also those fees for new commercial/industrial development as provided for in Section Three of this Report. In this instance, TUSD is justified in levying and collecting the maximum fee per square foot from new residential developments in the amount indicated in the following Table:

Table XIII
Fee Allocation by School Type -- Residential Development

Authorized Fee Pursuant to Government Code Section 65995	Amount (*)
Statutory School Fee (Level I Fee)	\$4.79 per square foot

* Fees collected by TUSD effective June 10, 2022, if adopted by the Board on April 11, 2022.

Table XIV identifies the facilities costs per dwelling unit and on a square foot basis -- the facilities cost per square foot, the amount of the proposed fee to be collected by TUSD and the net fee deficit for new development. As can be seen, the amount required is over five times the amount that can be collected (\$4.79) by the TUSD if adopted by the Board:

*Table XIV
Comparison of Facilities Cost to Currently Authorized Fee (*)*

Facilities Cost Per D/U	Average SqFt Per Dwelling Unit	Facilities Cost Per Sqft	Current Fee Per Sqft	Fee Deficit Per Sqft
\$22,695	1,456	\$15.59	\$4.79	(\$10.80)

* Fees collected by TUSD effective June 10, 2022, if adopted by the Board on April 11, 2022.

Section
Three

COMMERCIAL/INDUSTRIAL DEVELOPMENT

This Section of the Report identifies the school facilities impact from new commercial and industrial development.

School Facilities Impacts from Commercial/Industrial Development

Just as the District is required to establish the impact of new residential development on student enrollment and a corresponding need for additional school facilities, a similar nexus must be established between new commercial/industrial development and the corresponding need for additional school facilities. The four-step methodology used to quantify the impact of commercial/industrial development on student enrollment is discussed in this section of the report and is summarized as follows:

1. *Determine the number of employees required per square foot for specific types of commercial and industrial development (i.e., new jobs created within the school district).*
2. *Determine the number of new employees that would both live and work within the school district.*
3. *Determine the number of occupied housing units that would be associated with new employees.*
4. *Determine the number of new students generated from these employees utilizing the estimated student generation rates.*

Estimated Number of Employees per Square Foot

Because the utilization of commercial and industrial buildings varies significantly, in order to estimate the number of employees and hence, the number of school age children generated by employees, it is important that the relationship between the size of any commercial/industrial development and its associated employee base, be established for various development or land use types. To do this, the TUSD relied on survey results published in SANDAGs report entitled Traffic Generators Guide. This Traffic Generators Guide reflects data gleaned from a site-specific employment inventory of diverse developments throughout San Diego County. Multiple sites for 17 different development types are included in the survey data and the square footage and number of employees has been averaged for each development type yielding the average number of employees per thousand square feet as shown in the following table:

*Table XV
Region-wide Employment Per 1,000 Square Feet by Development Type ⁽¹⁾*

Development Type	Square Feet of Dev. Type	Total Employees	Employees per 1,000 Sqft. ⁽²⁾
Self-Storage	34,191	2	0.058
Specialized Recreation	19,850	9	0.453
Hotel /Motel	165,200	184	1.114
Discount Retail Club	128,679	215	1.671
Commercial Strip Center	27,677	50	1.807
Regional Shopping Center	1,496,927	2,777	1.855
Car Dealers	28,433	57	2.005
Industrial Parks (No Commercial)	351,266	733	2.087
Community Shopping Center	151,525	363	2.396
Industrial Plants (Mult. Shift)	456,000	1,120	2.456
Neighborhood Shopping Center	69,509	178	2.561
Corporate Office (Single User)	127,331	342	2.686
Banks	9,203	26	2.825
Scientific Research & Development	221,184	673	3.043
Industrial/Business Parks	260,379	972	3.733
Commercial Offices (>100,000 sqft)	135,433	625	4.615
Commercial Offices (<100,000 sqft)	27,100	130	4.797
Medical Offices	15,306	96	6.272
Restaurants	5,267	48	9.113

(1) Source: SANDAG Publication, Traffic Generators Guide

(2) Employees per 1,000 Sqft = (Total Employees divided by Square Feet of Development Type x .0001)

Estimated Number of Employees Living & Working within the School District

In order to determine the minimum number of students that will be generated as a result of new commercial/industrial development, an estimate of the number of employees (i.e., parents of the children expected to attend schools within the District) that will both work and live within the District must be determined. To make this determination, SDFA relied on Census data and Worksite information provided by the Equal Employment Opportunity Commission (EEOC). Specifically, SDFA obtained employment and population estimates for the cities of Irvine, Santa Ana and Tustin. Tabulations of the Worksite and population estimates are contained in Appendix 'E'.

Based on its American Community Survey (2006-2010), the US Census Bureau estimated that there was a total of 408,950 employees working within the cities of Irvine, Santa Ana and Tustin (the "Worksite Census Area"). The census data also contains "place of residence" information for these employees. The following table identifies the residential employee generation rate (REGR) for the three cities, which is determined by dividing the total number of employees within the Worksite Census Area by the total number of employees that *both live and work* within the boundaries of Worksite Census Area.

Table XVI
Estimated Resident Employees within the Worksite Census Area ⁽¹⁾

Jurisdiction	Total Employees	Place of Residence			Pct of Employees Residing in Irvine, Santa Ana or Tustin
		Irvine	Santa Ana	Tustin	
Irvine	216,375	42,265	19,910	7,495	32.20%
Santa Ana	154,675	6,390	41,630	5,460	34.58%
Tustin	37,900	2,815	4,490	6,325	35.96%
Total	408,950	51,470	66,030	19,280	33.45%

(1) Source: US Census Bureau American Community Survey (2006-2010)

Because the census data does not identify a place of residence which corresponds solely to the jurisdictional boundaries of the TUSD, it was assumed that the REGR for the Worksite Census Area would produce a close approximation of the actual REGR for the TUSD. This assumption is reasonable because the commercial and industrial development characteristics of areas outside of the TUSD but within the jurisdictional boundaries of the Worksite Census Area are similar to those of commercial and industrial developments within the boundaries of the TUSD.

It should be noted that by considering only those employees that both live and work within the TUSD (as expressed by the REGR), the District is being conservative in its estimate of the impact of commercial/industrial development on student enrollment because the methodology identified herein does not take into account any students who may attend schools within the District as a result of Education Code Section 48204 (i.e., interdistrict transfers). Section 48204 of the Education Code permits employees working within the school district who do not reside within the boundaries of the school district to request that their children be permitted to attend a school within the boundaries of the District in which they work. The census data suggests that approximately sixty-seven percent (67%) of Worksite Census Area workers commute from outside of the Worksite Census Area to their jobs.

Nevertheless, by multiplying the number of employees per thousand square feet as shown in Table XV by the REGR computed for the Worksite Census Area, one can derive a REGR for the various commercial/industrial development types. The following table indicates that for every 1,000 square feet of new commercial or industrial development, expected residential employee generation ranges from a low of 0.019 employees for *Self-Storage* to a high of 3.048 employees for *Restaurants*.

Table XVII
Resident Employee Generation Factors by Development Type

Development Type	Employees per 1,000 Sqft.	Residential Employment Generation Rate	Resident Employee Per 1,000 Sqft.
Self-Storage	0.058	.3345	0.019
Specialized Recreation	0.453	.3345	0.152
Lodging	1.114	.3345	0.373
Discount Retail Club	1.671	.3345	0.559
Commercial Strip Center*	1.807	.3345	0.604
Regional Shopping Center	1.855	.3345	0.620
Car Dealers*	2.005	.3345	0.671
Industrial Parks (No Commercial)	2.087	.3345	0.698
Community Shopping Center	2.396	.3345	0.801
Industrial Plants (Mult. Shift)*	2.456	.3345	0.821
Neighborhood Shopping Center	2.561	.3345	0.857
Corporate Office (Single User)	2.686	.3345	0.898
Banks	2.825	.3345	0.945
Scientific Research & Development	3.043	.3345	1.018
Industrial/Business Parks	3.733	.3345	1.249
Commercial Offices (>100,000 sqft)	4.615	.3345	1.544
Commercial Offices (<100,000 sqft)	4.797	.3345	1.604
Medical Offices	6.272	.3345	2.098
Restaurants*	9.113	.3345	3.048

Estimated Household Rate per Resident Worker

In order to quantify the impact of these residential workers on the District, two additional relationships must be established. The first of these is the number of households per resident worker. Utilizing estimates of occupied housing within the Worksite Census Area as prepared by the California Department of Finance, SDFA identified the household rate (i.e., the number of occupied housing units per residential worker) to be 0.7596:

Table XVIII
Household Rate for Worksite Census Area

Worksite Census Area Component	Resident Workers (Irvine, Santa Ana or Tustin)	Occupied Housing Units	Household Rate *
City of Irvine	51,470	81,165	63.41%
City of Santa Ana	66,030	73,242	90.15%
City of Tustin	19,280	25,662	75.13%
Aggregate Worksite Census Area	136,780	180,069	75.96%

Source: 2006-2010 Census Data and 2013 Housing Unit Estimates from the California Department of Finance

* Household Rate = Occupied Housing Units / Resident Workers

By applying the household generation rate for the Worksite Census Area of .7596 to the Resident Employee Generation Factors shown in Table XVII, housing units required per employee for each commercial/industrial land use category can then be determined. Expected household generation per 1,000 square feet of commercial/industrial development appears in the following table:

Table XIX
Household Generation for Commercial/Industrial Land Uses

Development Type	Residential Employees per 1,000 Sqft.	Household Generation Rate	District Households Per 1,000 Sqft
Self-Storage	0.019	.7596	0.015
Specialized Recreation	0.152	.7596	0.115
Lodging	0.373	.7596	0.283
Discount Retail Club	0.559	.7596	0.425
Commercial Strip Center*	0.604	.7596	0.459
Regional Shopping Center	0.620	.7596	0.471
Car Dealers*	0.671	.7596	0.509
Industrial Parks (No Commercial)	0.698	.7596	0.530
Community Shopping Center	0.801	.7596	0.609
Industrial Plants (Mult. Shift)*	0.821	.7596	0.624
Neighborhood Shopping Center	0.857	.7596	0.651
Corporate Office (Single User)	0.898	.7596	0.682
Banks	0.945	.7596	0.718
Scientific Research & Development	1.018	.7596	0.773
Industrial/Business Parks	1.249	.7596	0.948
Commercial Offices (>100,000 sqft)	1.544	.7596	1.172
Commercial Offices (<100,000 sqft)	1.604	.7596	1.219
Medical Offices	2.098	.7596	1.593
Restaurants*	3.048	.7596	2.315

School Facilities Cost from Commercial/Industrial Development

Since the school facilities cost per new dwelling unit was already identified in Table XII, by applying the total cost per dwelling unit to the district household generation shown in Table XIX, the gross school facilities impact of commercial/industrial development can be determined. The resulting facilities cost per square foot is shown in Table XX and ranges from \$.054 to \$84.27 per square foot of development.

Table XX
Gross School Facilities Impact for Commercial/Industrial Land Uses

Development Type	District Households Per Sqft of Non-Res. Dev.	School Facilities Cost Per Dwelling Unit	Gross Facilities Cost Per Sqft of Commercial/Industrial Development
Self-Storage	0.0000147	\$22,695	\$0.33
Specialized Recreation	0.0001151	\$22,695	\$2.61
Lodging	0.0002830	\$22,695	\$6.42
Discount Retail Club	0.0004245	\$22,695	\$9.63
Commercial Strip Center*	0.0004591	\$22,695	\$10.42
Regional Shopping Center	0.0004713	\$22,695	\$10.70
Car Dealers*	0.0005094	\$22,695	\$11.56
Industrial Parks (No Commercial)	0.0005032	\$22,695	\$12.03
Community Shopping Center	0.0006087	\$22,695	\$13.82
Industrial Plants (Mult. Shift)*	0.0006240	\$22,695	\$14.16
Neighborhood Shopping Center	0.0006506	\$22,695	\$14.77
Corporate Office (Single User)	0.0006824	\$22,695	\$15.49
Banks	0.0007177	\$22,695	\$16.29
Scientific Research & Development	0.0007731	\$22,695	\$17.55
Industrial/Business Parks	0.0009484	\$22,695	\$21.52
Commercial Offices (>100,000 sqft)	0.0011725	\$22,695	\$26.61
Commercial Offices (<100,000 sqft)	0.0012187	\$22,695	\$27.66
Medical Offices	0.0015935	\$22,695	\$36.16
Restaurants*	0.0023152	\$22,695	\$52.54

Commercial/Industrial Development Impact

As noted, the school facilities impact shown above represents the total cost to provide school facilities required to serve new students resulting from the construction of new commercial/industrial development. This amount reflects the gross impact of such development and does not consider the impact fees already collected from new residential construction. Nor does it consider that as new commercial/industrial development occurs, some portion of the new employees will be housed in existing housing (from which no additional residential impact fee may be collected). Assuming that each resident employee also resides in a dwelling unit for which the statutory fee amount has also been paid, one could then derive the net facilities impact associated with each development type. If the statutory fee of \$4.79 per square foot is imposed on the average home size of 1,456 per square foot (see Table XIV), then a total of \$6,974 would be collected for each dwelling unit leaving a facilities deficit of \$15,721 per dwelling unit. By applying the Per Square Foot Household Factors (PSFHF) shown in Table XX, one can then identify the net facilities impact.

The following table shows the *net facilities* impact remaining if the currently authorized maximum statutory fee (Level I Fee) was collected from all new residential development:

By multiplying the “fee deficit per D/U” of \$15,721 by the PSFHF applicable to each of the non-residential development types, we can then see the net facilities cost remaining after collection of the statutory residential fee:

Table XXI
Net Facilities Deficit After Collection of Residential Impact Fee

Development Type	District Households Per Square Foot of Non-Residential Development	Unfunded Impact Per Square Foot After Collection of Statutory Fee
Self-Storage	0.0000147	\$0.04
Specialized Recreation	0.0000115	\$0.35
Lodging	0.0000283	\$0.85
Discount Retail Club	0.0004245	\$1.28
Commercial Strip Center*	0.0004591	\$1.38
Regional Shopping Center	0.0004713	\$1.42
Car Dealers*	0.0005094	\$1.53
Industrial Parks (No Commercial)	0.0005032	\$1.60
Community Shopping Center	0.0006087	\$1.83
Industrial Plants (Mult. Shift) *	0.0006240	\$1.88
Neighborhood Shopping Center	0.0006506	\$1.96
Corporate Office (Single User)	0.0006824	\$2.05
Banks	0.0007177	\$2.16
Scientific Research & Development	0.0007731	\$2.33
Industrial/Business Parks	0.0009484	\$2.85
Commercial Offices (>100,000 sqft)	0.0011725	\$3.53
Commercial Offices (<100,000 sqft)	0.0012187	\$3.67
Medical Offices	0.0015935	\$4.80
Restaurants*	0.0002315	\$6.97

Thus, assuming that all employees working in new non-residential developments within the District also reside in new housing within the District and the District was collecting the current statutory fee (Level I) of \$4.79 per square foot from each home, a fee deficit *after collecting the maximum statutory fee for residential development* would still range between \$0.04 (Self-Storage) and \$6.67 (Restaurants) per square foot of new non-residential development.

Thus, based on TUSD’s authorized share of the proposed non-residential fee (i.e., \$0.78 per square foot of non-residential development), assuming that every employee within the TUSD also resided within the TUSD and was housed in a dwelling unit for which the statutory fee (Level I Fee) for residential and the statutory non-residential fee was collected, with the exception of Self-Storage, a net facilities funding deficit would still remain for all of the development types listed in Table XXI .

And as previously mentioned, this analysis does not consider inter-district transfers pursuant to Education Code Section 48204. Section 48204 of the Education Code permits employees working within the school district who do not reside within the boundaries of the school district to

request that their children be permitted to attend a school within the boundaries of the District in which they work. For any of these pupils, the District will have collected no corresponding residential development impact fees.

Pursuant to Government Code Section 65995(b)(2), a unified school district is authorized to collect \$0.78 per square foot of new commercial/industrial development. Since not all employees reside within the District and live in homes that have or will pay statutory school fees, for Self-Storage development, the District is justified in collecting the gross school facility impact of \$0.33 per square foot as indicated in Table XX. For all other commercial/industrial development types shown in Table XX, TUSD is justified in levying the maximum fee of \$0.78 per square foot as shown in the following table.

*Table XXII
Authorized Development Fee -- Commercial/Industrial Development*

Fee Component	Total Statutory Fee Collected per Government Code §65995
Authorized Statutory Fee Per Square Foot of New Commercial/Industrial Development	\$0.78 per square foot
Authorized Statutory Fee Per Square Foot of New Self-Storage Development	\$0.33 per square foot

Impacts from Senior Housing

As it relates to the imposition of developer fees upon senior citizen housing projects, Section 65995.1(a) of the Government Code reads as follows:

Notwithstanding any other provision of law, as to any development project for the construction of senior citizen housing, as described in Section 51.3 of the Civil Code, a residential care facility for the elderly as described in subdivision (k) of Section 1569.2 of the Health and Safety Code^[1], or a multilevel facility for the elderly as described in paragraph (9) of subdivision (d) of Section 15432, any fee charge, dedication or other requirement that is levied under Section 53080^[2] may be applied only to new construction and is subject to the limits and conditions under subdivision (b) of Section 65995 in the case of commercial or industrial development.

[1] Although described in subdivision (k), the definition is found under subdivision (o) and (p).

[2] Government Code Section 53080 was revised to Education Code Section 17620.

The District acknowledges that students will not reside in senior citizen housing units. However, the development of such housing generates jobs for facilities maintenance and administration, and in the case of assisted care living situations, health professionals. These jobs may be filled by persons living either within the boundaries of the District or outside the boundaries of the District. In either case, the employees may enroll their students in the District. As a result some students may be generated as a result of the development of new senior citizen housing.

The District conducted a survey of senior citizen housing projects within the District- both assisted-care and independent-living facilities and as a result of applying the methodology used to quantify the impacts of commercial and industrial development as set forth in this report, determined that

the expected facilities cost per square foot of senior housing was \$2.09. Thus, the District acknowledges Section 65995.1 and will levy its share of developer fees on any senior citizen housing projects at the current commercial/industrial rate of \$0.78 per square foot.

Redevelopment

Redevelopment means the voluntary demolition of existing residential dwelling units or commercial or industrial construction and the subsequent construction of new residential dwelling units or commercial/industrial construction ("Redevelopment").

The District acknowledges that Redevelopment projects, more specifically, the demolishing of existing development replaced with new construction, may occur within the next five-year period. In such a situation, the District shall levy school fees authorized pursuant to Education Code Section 17620 and Government Code Sections 65995 et seq. ("School Fees") if there is a nexus established between the impact of the new construction in terms of a net increase in students generated and the fee to be imposed. In other words, the School Fees must bear a nexus to the burden caused by the Redevelopment project.

The purpose of this section is to set forth a general policy for the levy of Statutory School Fees on future Redevelopment projects within the District. The District may levy the applicable Statutory School Fees if an unmitigated impact exists once an analysis has been done on the impact on school facilities from such construction and consideration has been given as to the applicability of a "credit" for previously existing impacts, if any.

The analysis will identify if the Redevelopment project results in any additional impact to the District by comparing the potential students to be generated from the new construction to the potential students generated from the existing construction to be demolished. Statutory School Fees will be assessed only to the extent of the net school facilities impact from the new construction as noted above, but in no event will the School Fees assessed be greater than the applicable Statutory School Fees.

The District will perform an analysis utilizing the above-mentioned criteria to determine the applicability of Statutory School Fees to each Redevelopment project presented to the District.

Section

Four

CONCLUSIONS & STATEMENT OF FINDINGS

Based upon the data gathered by SDFA regarding future development within the boundaries of the TUSD, student generation, school facilities costs, and the methodology employed to determine the school facilities impact from new residential and commercial development, TUSD makes the following findings pursuant to Section 66001 of the California Government Code:

- *The purpose of the fee is to pay for the construction and/or acquisition of new school facilities and equipment necessary to serve students expected to be generated from new residential and commercial/industrial development.*
- *The fees will be collected and may be used to repay debt service on bonds issued for the purpose of providing new school facilities or to pay directly for the acquisition and/or construction of such facilities and equipment. The fees may also be used to pay for the leasing or acquisition of portable classrooms to meet the temporary needs of students generated from new development.*
- *There is a reasonable relationship between the expected use of the fee (i.e., new school facilities and equipment) and the development on which the fee is imposed (i.e., new residential, commercial and industrial development) because additional students will be generated by new residential and commercial/industrial development.*
- *There is a reasonable relationship between the number of new residential units constructed and the number of elementary school students expected to be generated from the construction of such units. There is also a reasonable relationship between the construction of new commercial and industrial development and the number of students expected to be generated from the construction of such commercial/industrial development, as the parents of students will be employed by new businesses occupying the new commercial or industrial development and a portion of the students' parents will also choose to live within the boundaries of the District.*
- *There is a reasonable relationship between the amount of the fee identified in this Report and the cost of the school facilities to be constructed and deemed required to serve new residential, commercial and industrial developments.*
- *There is a reasonable relationship between the amount of the fee identified in this Report and the cost of the school facilities to be constructed and deemed required to serve new development projects that are intended to house senior citizens.*

Section
Five

APPENDICES

Appendix A: School Capacity Worksheet

Appendix B: Student Generation Rate Computations

Appendix C: Future Development Projects

Appendix D: School Facilities Cost Estimates

Appendix E: 2006-10 Census Data – Employment & Housing

Appendix A: School Capacity Worksheet

**Tustin Unified School District
Capacity Calculation - State Loading Standards**

Fiscal Year 2021/22

School		Current Classroom Counts ⁽¹⁾				Capacity	Enrollment	
		TK-6	7-12	Severe	Non Severe	2021/22	2021/22 Enrollment	
	Total CR⁽¹⁾	25	27	9	13	100%		
ELEM	Arroyo	20		0	0	500	510	
ELEM	Benson	15		0	3	339	344	
ELEM	Beswick	16		0	2	376	417	
ELEM	Estock	16		0	0	400	401	
ELEM	Guin Foss	15		0	2	351	360	
ELEM	Heideman	26		0	0	650	531	
ELEM	Heritage	20		0	0	500	515	
ELEM	Hicks Canyon	33		0	0	825	820	
ELEM	Ladera	19		0	5	415	324	
ELEM	Loma Vista	18		0	3	414	472	
ELEM	Myford	23		0	3	539	479	
ELEM	Nelson	23		0	3	539	498	
ELEM	Orchard Hills - k-8 (see below)	19		0	0	475	501	
ELEM	Peters Canyon	19		0	3	439	463	
ELEM	Red Hill	16		0	2	376	407	
ELEM	Sycamore	29		0	0	725	778	
ELEM	Tustin Connect Academy	4		0	0	100	168	
ELEM	Tustin Memorial Academy	20		0	0	500	588	
ELEM	Tustin Ranch	20		0	0	488	534	
	Totals	371	345	0	0	26	8,951	9,110

School		Current Classroom Counts ⁽¹⁾				Capacity	Enrollment	
		TK-6	7-12	Severe	Non Severe	2021/22	2021/22 Enrollment	
	Total CR⁽¹⁾	25	27	9	13	100%		
MID	Columbus Tustin	30	0	26	0	4	754	636
MID	Hewes	39	0	34	0	5	983	864
MID	Legacy Magnet	18	0	18	0	0	486	493
MID	Orchard Hills	30	0	27	0	3	768	851
MID	Pioneer	43	0	39	0	4	1,105	885
MID	Sycamore	22	0	21	0	1	580	565
MID	Tustin Connect Academy	2	0	2	0	0	54	79
MID	Utt	34	0	28	0	6	834	672
	Totals	218	0	195	0	23	5,564	5,045

School		Current Classroom Counts ⁽¹⁾				Capacity	Enrollment	
		TK-6	7-12	Severe	Non Severe	2021/22	2021/22 Enrollment	
	Total CR⁽¹⁾	25	27	9	13	100%		
HIGH	Beckman	106		0	10	2,722	2,821	
HIGH	Foothill	88		0	8	2,264	2,317	
HIGH	Hillview/Sycamore at Lambert	13		0	0	351	202	
HIGH	Legacy Magnet	7		0	0	189	192	
HIGH	Tustin Connect Center	4		0	0	108	197	
HIGH	Tustin	83		0	8	2,129	2,154	
	Totals	301	0	275	0	26	7,763	7,883

SUMMARY

Total CR	TK-6	7-12	Severe	Non Severe	2020/21 Capacity 100%	2020/21 Enrollment
890	345	470	0	75	22,278	22,038

(1) Classroom Counts exclude classroom facilities that do not meet state requirements (i.e., less < 960 square feet) or which are used for other educational purposes (ROP, etc).

Appendix B: Student Generation Rate Computations

Appendix "B"

Tustin Unified School District

Student Generation Rate Computations - Dwelling Units Permitted from Project Inception through December 31, 2020

CFD	Project Number	Project Name	Tract No.	Permitted Dwelling Units	Permitted D/Us with Sq Ft	Permitted Square Footage	Average Square Footage	Student Totals				Student Generation Rates			
								Grades K-5	Grades 6-8	Grades 9-12	Grades K-12	Grades K-5	Grades 6-8	Grades 9-12	Grades K-12
Apartment Units:															
07-1	99	Orchard Hills Apartments	16529	500	500	796,384	1,593	71	43	51	165	0.1420	0.0860	0.1020	0.3300
88-1	1	Rancho Maderas	13030	266	0	0		47	13	25	85	0.1767	0.0489	0.0940	0.3195
88-1	12	Rancho Mariposa	13735	238	0	0		16	17	14	47	0.0672	0.0714	0.0588	0.1975
88-1	14	Sierra Vista	13786	306	0	0		34	15	14	63	0.1111	0.0490	0.0458	0.2059
88-1	15	Shadow Canyon	13788	170	0	0		12	6	13	31	0.0706	0.0353	0.0765	0.1824
88-1	2	Rancho Tierra	13038	252	0	0		40	24	41	105	0.1587	0.0952	0.1627	0.4167
88-1	29	Rancho Monterey	14447	436	0	0		49	25	31	105	0.1124	0.0573	0.0711	0.2408
88-1	37	Rancho Santa Fe	15350	316	0	0		91	27	47	165	0.2880	0.0854	0.1487	0.5222
97-1	54	Estancia	15652-A	388	388	515,480	1,329	134	64	53	251	0.3454	0.1649	0.1366	0.6469
97-1	55	Solano	15652-B	356	356	424,941	1,194	73	26	26	125	0.2051	0.0730	0.0730	0.3511
97-1	56	Montecito Vista (Affordable)	15661	162	162	212,248	1,310	26	22	33	81	0.1605	0.1358	0.2037	0.5000
97-1	68	Somerset	15871	378	378	565,012	1,495	29	11	30	70	0.0767	0.0291	0.0794	0.1852
97-1	76	Las Palmas	15922-A	380	380	577,966	1,521	26	18	33	77	0.0684	0.0474	0.0868	0.2026
97-1	77	Anacapa	15922-B	736	736	888,429	1,207	79	32	73	184	0.1073	0.0435	0.0992	0.2500
97-1	94	Serrano	16319	756	756	910,093	1,204	64	28	65	157	0.0847	0.0370	0.0860	0.2077
MCAS	Aff	Amalfi (St Anton) - 3100 Par	17404	225	225	285,487	1,269	53	13	17	83	0.2356	0.0578	0.0756	0.3689
MCAS	Mkt	Anton @ Legacy - 16000 Le	17404	533	533	781,044	1,465	14	10	1	25	0.0263	0.0188	0.0019	0.0469
Total Apartment Dwelling Units:				6,398	4,414	5,957,084	1,350	858	394	567	1,819	0.1341	0.0616	0.0886	0.2843
Single-Family Attached (SFAs):															
06-1	102	Cambridge	16857	156	156	203,695	1,306	24	4	9	37	0.1538	0.0256	0.0577	0.2372
06-1	103	Camden	16857	222	222	354,108	1,595	48	17	16	81	0.2162	0.0766	0.0721	0.3649
06-1	105	Meriwether	16857	114	114	187,085	1,641	16	5	1	22	0.1404	0.0439	0.0088	0.1930
06-1	107	Mirabella	16857	60	60	114,594	1,910	12	4	5	21	0.2000	0.0667	0.0833	0.3500
14-1	115	Terraza	16719	149	149	327,542	2,198	54	24	19	97	0.3624	0.1611	0.1275	0.6510
88-1	10	Miramonte	13733	138	0	0		11	14	30	55	0.0797	0.1014	0.2174	0.3986
88-1	13	Mandevilla	13746	316	0	0		26	5	17	48	0.0823	0.0158	0.0538	0.1519
88-1	16	Corte Villa	13796	108	0	0		13	8	12	33	0.1204	0.0741	0.1111	0.3056
88-1	17	Rancho Vera Cruz	13824	317	0	0		10	6	6	22	0.0315	0.0189	0.0189	0.0694
88-1	18	Venturanza	13835	268	55	174,418	3,171	36	30	31	97	0.1343	0.1119	0.1157	0.3619
88-1	22	Ventana	14110	129	0	0		11	6	15	32	0.0853	0.0465	0.1163	0.2481
88-1	27-A	Presidio	14381	32	0	0		7	5	6	18	0.2188	0.1563	0.1875	0.5625
88-1	27-B	Presidio	14567	33	0	0		5	3	7	15	0.1515	0.0909	0.2121	0.4545
88-1	27-C	Presidio	14748	102	0	0		30	9	12	51	0.2941	0.0882	0.1176	0.5000
88-1	30	Cantada	14499	208	0	0		21	15	15	51	0.1010	0.0721	0.0721	0.2452
88-1	34	The Orchards	14883	223	0	0		20	19	21	60	0.0897	0.0852	0.0942	0.2691
88-1	6	Arcadia	13096	237	0	0		21	23	25	69	0.0886	0.0970	0.1055	0.2911
88-1	7	Sevilla	13106	110	0	0		12	10	13	35	0.1091	0.0909	0.1182	0.3182
88-1	8	Estancia	13161	145	0	0		15	6	15	36	0.1034	0.0414	0.1034	0.2483
97-1	58	Sheridan Place	15712	147	147	289,002	1,966	33	20	32	85	0.2245	0.1361	0.2177	0.5782
97-1	59	Terra Bella	15739	128	128	248,576	1,942	11	6	8	25	0.0859	0.0469	0.0625	0.1953
97-1	60	Brisbane	15740	130	130	275,530	2,119	15	14	21	50	0.1154	0.1077	0.1615	0.3846
97-1	61	Evergreen	15741	108	108	283,848	2,628	22	16	22	60	0.2037	0.1481	0.2037	0.5556
97-1	72	Summer Place	15875	69	69	172,335	2,498	7	9	16	32	0.1014	0.1304	0.2319	0.4638
97-1	74	Mandeville	15877	132	132	260,556	1,974	44	16	19	79	0.3333	0.1212	0.1439	0.5985
97-1	75	Andover	15878	138	138	257,007	1,862	27	16	25	68	0.1957	0.1159	0.1812	0.4928
97-1	81	Auburn	15975	152	152	328,268	2,160	35	21	23	79	0.2303	0.1382	0.1513	0.5197
97-1	82	San Simeon	15976	116	98	200,757	2,049	14	23	31	68	0.1207	0.1983	0.2672	0.5862
97-1	88	Vintner's Reserve	16080	64	64	162,078	2,532	8	5	16	29	0.1250	0.0781	0.2500	0.4531
97-1	92	San Juan Batista	16084	108	108	225,141	2,085	22	10	20	52	0.2037	0.0926	0.1852	0.4815
97-1	93	Monticello	16085	112	104	211,816	2,037	14	8	21	43	0.1250	0.0714	0.1875	0.3839
97-1	96	Tamarisk	16644	113	113	157,002	1,389	20	17	19	56	0.1770	0.1504	0.1681	0.4956
Total Single-Family Attached (SFAs):				4,584	2,247	4,433,358	1,973	664	394	548	1,606	0.1449	0.0860	0.1195	0.3503
Single-Family Detached (SFDs):															
06-1	101	Astoria	16857	102	102	298,214	2,924	27	10	6	43	0.2647	0.0980	0.0588	0.4216

Appendix "B"

Tustin Unified School District

Student Generation Rate Computations - Dwelling Units Permitted from Project Inception through December 31, 2020

CFD	Project Number	Project Name	Tract No.	Permitted Dwelling Units	Permitted D/Us with Sq Ft	Permitted Square Footage	Average Square Footage	Student Totals				Student Generation Rates			
								Grades K-5	Grades 6-8	Grades 9-12	Grades K-12	Grades K-5	Grades 6-8	Grades 9-12	Grades K-12
06-1	104	Gables	16857	84	84	257,187	3,062	18	5	1	24	0.2143	0.0595	0.0119	0.2857
06-1	106	Verandas	16857	97	97	211,020	2,175	34	12	11	57	0.3505	0.1237	0.1134	0.5876
14-1	108	La Vita	16702	72	72	260,108	3,613	12	5	4	21	0.1667	0.0694	0.0556	0.2917
14-1	109	Saviero/Pasadena	16703	90	90	353,484	3,928	27	14	7	48	0.3000	0.1556	0.0778	0.5333
14-1	110	Vicenza	16704	91	91	364,354	4,004	22	16	16	54	0.2418	0.1758	0.1758	0.5934
14-1	111	Messina	16705	43	43	159,668	3,713	9	1	3	13	0.2093	0.0233	0.0698	0.3023
14-1	112	Tevi II	16707	35	35	186,005	5,314	10	5	8	23	0.2857	0.1429	0.2286	0.6571
14-1	113	Amelia	16708	70	70	322,276	4,604	17	7	8	32	0.2429	0.1000	0.1143	0.4571
14-1	114	Lucia (Amelia Ext)	16709	17	17	74,651	4,391	2	1	4	7	0.1176	0.0588	0.2353	0.4118
14-1	116	Strada	16722-Ptn	59	59	151,063	2,560	12	7	11	30	0.2034	0.1186	0.1864	0.5085
14-1	117	Messina II	16741	59	59	218,122	3,697	24	4	11	39	0.4068	0.0678	0.1864	0.6610
14-1	118	Trevi	17091	37	37	209,692	5,667	7	6	8	21	0.1892	0.1622	0.2162	0.5676
14-1	119	Capella	17619	72	72	221,669	3,079	26	13	10	49	0.3611	0.1806	0.1389	0.6806
14-1	120	Trevi III	17628	10	10	52,283	5,228	0	2	3	5	0.0000	0.2000	0.3000	0.5000
14-1	121	Bella Vista	17746	126	126	667,369	5,297	24	13	13	50	0.1905	0.1032	0.1032	0.3968
14-1	122	Alta Vista	17746	97	97	572,041	5,897	17	9	8	34	0.1753	0.0928	0.0825	0.3505
14-1	123	Varena	17768	135	135	350,585	2,597	30	10	12	52	0.2222	0.0741	0.0889	0.3852
14-1	124	Pavoda	17767	121	121	372,207	3,076	35	13	13	61	0.2893	0.1074	0.1074	0.5041
14-1	125	Lucca	16709	23	23	100,717	4,379	5	5	3	13	0.2174	0.2174	0.1304	0.5652
14-1	126	Genoa	17798	40	40	150,304	3,758	10	0	0	10	0.2500	0.0000	0.0000	0.2500
14-1	127	Cetara	19006	25	25	77,414	3,097	0	0	0	0	0.0000	0.0000	0.0000	0.0000
14-1	128	Palermo	19004	21	21	89,050	4,240	0	0	0	0	0.0000	0.0000	0.0000	0.0000
88-1	11	Pala Vista	13734	118	0	0	0	14	13	13	40	0.1186	0.1102	0.1102	0.3390
88-1	19	Montecito	13902	115	0	0	0	15	7	10	32	0.1304	0.0609	0.0870	0.2783
88-1	20	Sorrento	13908	97	0	0	0	10	5	10	25	0.1031	0.0515	0.1031	0.2577
88-1	21	Alicante	13990	91	0	0	0	15	13	17	45	0.1648	0.1429	0.1868	0.4945
88-1	23-A	San Miguel	14168	69	0	0	0	11	2	13	26	0.1594	0.0290	0.1884	0.3768
88-1	23-B	San Miguel	14669	69	0	0	0	20	7	14	41	0.2899	0.1014	0.2029	0.5942
88-1	24	San Marco	14188	57	0	0	0	6	3	11	20	0.1053	0.0526	0.1930	0.3509
88-1	25	Barcelona	14295	77	0	0	0	8	10	7	25	0.1039	0.1299	0.0909	0.3247
88-1	26-A	Serrano	14366	48	0	0	0	6	5	7	18	0.1250	0.1042	0.1458	0.3750
88-1	26-B	Serrano	14576	43	0	0	0	12	9	8	29	0.2791	0.2093	0.1860	0.6744
88-1	28	El Dorado	14410	171	0	0	0	44	32	55	131	0.2573	0.1871	0.3216	0.7661
88-1	3	Almeria	13053	118	0	0	0	15	11	23	49	0.1271	0.0932	0.1949	0.4153
88-1	31	Travilla	14782	94	0	0	0	16	7	8	31	0.1702	0.0745	0.0851	0.3298
88-1	32-A	Valencia	14784	98	0	0	0	14	2	13	29	0.1429	0.0204	0.1327	0.2959
88-1	32-B	Valencia	14837	52	0	0	0	6	4	10	20	0.1154	0.0769	0.1923	0.3846
88-1	33-A	Vidorra	14797	31	31	63,411	2,046	4	5	10	19	0.1290	0.1613	0.3226	0.6129
88-1	33-B	Vidorra	15428	30	2	3,572	1,786	12	4	9	25	0.4000	0.1333	0.3000	0.8333
88-1	33-C	Vidorra	15429	27	27	46,707	1,730	5	6	6	17	0.1852	0.2222	0.2222	0.6296
88-1	33-D	Vidorra	15430	34	34	60,846	1,790	6	10	10	26	0.1765	0.2941	0.2941	0.7647
88-1	35	La Montana	15292	65	0	0	0	7	6	20	33	0.1077	0.0923	0.3077	0.5077
88-1	36-A	Estrella	15316	28	28	48,482	1,732	5	4	5	14	0.1786	0.1429	0.1786	0.5000
88-1	36-B	Estrella	15373	3	0	0	0	3	1	1	5	1.0000	0.3333	0.3333	1.6667
88-1	36-C	Estrella	15374	30	0	0	0	8	6	11	25	0.2667	0.2000	0.3667	0.8333
88-1	36-D	Estrella	15375	10	10	16,472	1,647	1	1	0	2	0.1000	0.1000	0.0000	0.2000
88-1	38-A	Columbia/Westmont	15380	25	25	79,178	3,167	3	3	7	13	0.1200	0.1200	0.2800	0.5200
88-1	38-B	Columbia/Westmont	15502	9	9	27,962	3,107	4	0	0	4	0.4444	0.0000	0.0000	0.4444
88-1	38-C	Columbia/Westmont	15503	22	22	57,827	2,629	5	4	4	13	0.2273	0.1818	0.1818	0.5909
88-1	38-D	Columbia/Westmont	15504	17	17	51,174	3,010	3	4	5	12	0.1765	0.2353	0.2941	0.7059
88-1	38-E	Columbia/Westmont	15505	36	36	96,551	2,682	5	4	10	19	0.1389	0.1111	0.2778	0.5278
88-1	38-F	Columbia/Westmont	15506	23	23	60,327	2,623	6	5	7	18	0.2609	0.2174	0.3043	0.7826
88-1	38-G	Columbia/Westmont	15507	30	30	89,562	2,985	4	3	10	17	0.1333	0.1000	0.3333	0.5667
88-1	39	Madrid	15420	75	75	251,538	3,354	16	9	16	41	0.2133	0.1200	0.2133	0.5467
88-1	4	Maricopa	13080	100	0	0	0	16	7	28	51	0.1600	0.0700	0.2800	0.5100
88-1	40-A	Arborwalk	15427	16	16	23,740	1,484	4	1	5	10	0.2500	0.0625	0.3125	0.6250
88-1	40-B	Arborwalk	15474	16	0	0	0	2	0	0	2	0.1250	0.0000	0.0000	0.1250

Appendix "B"

Tustin Unified School District
 Student Generation Rate Computations - Dwelling Units Permitted from Project Inception through December 31, 2020

CFD	Project Number	Project Name	Tract No.	Permitted Dwelling Units	Permitted D/Us with Sq Ft	Permitted Square Footage	Average Square Footage	Student Totals				Student Generation Rates			
								Grades K - 5	Grades 6 - 8	Grades 9 -12	Grades K - 12	Grades K - 5	Grades 6 - 8	Grades 9 -12	Grades K - 12
88-1	41	Arborwalk	15475	21	21	31,390	1,495	2	3	1	6	0.0952	0.1429	0.0476	0.2857
88-1	42-A	Tustin Estates	15563	46	38	184,812	4,863	7	5	3	15	0.1522	0.1087	0.0652	0.3261
88-1	42-B	Tustin Estates	15993	22	0	0		5	2	3	10	0.2273	0.0909	0.1364	0.4545
88-1	42-C	Tustin Estates	16184	51	27	149,172	5,525	2	4	7	13	0.0392	0.0784	0.1373	0.2549
88-1	43	Sedona	15568	130	90	200,896	2,232	32	25	31	88	0.2462	0.1923	0.2385	0.6769
88-1	44	Treviso	15601	44	33	135,084	4,093	6	5	18	29	0.1364	0.1136	0.4091	0.6591
88-1	45	Emerson	15681	114	107	397,577	3,716	9	11	22	42	0.0789	0.0965	0.1930	0.3684
88-1	5	Monterey	13094	103	0	0		28	12	21	61	0.2718	0.1165	0.2039	0.5922
88-1	9	Malaga	13701	70	0	0		13	10	14	37	0.1857	0.1429	0.2000	0.5286
88-1	97	Lennar - Tea Leaf	16782	25	0	0		16	5	5	26	0.6400	0.2000	0.2000	1.0400
97-1	46	Traditions	15432	127	114	394,867	3,464	21	15	20	56	0.1654	0.1181	0.1575	0.4409
97-1	47	Heritage	15433	46	46	118,642	2,579	13	7	10	30	0.2826	0.1522	0.2174	0.6522
97-1	48-A	Liberty	15434	74	74	165,473	2,236	15	8	20	43	0.2027	0.1081	0.2703	0.5811
97-1	48-B	Liberty	15512	72	72	188,552	2,619	19	12	13	44	0.2639	0.1667	0.1806	0.6111
97-1	49	Legacy	15435	37	23	93,605	4,070	4	1	4	9	0.1081	0.0270	0.1081	0.2432
97-1	50	Heritage	15511	65	37	94,604	2,557	11	10	12	33	0.1692	0.1538	0.1846	0.5077
97-1	51	Amberwood	15555	92	76	212,051	2,790	19	14	31	64	0.2065	0.1522	0.3370	0.6957
97-1	52	Glen Willows	15641	194	104	243,307	2,339	33	34	51	118	0.1701	0.1753	0.2629	0.6082
97-1	53	Briarwood	15642	78	20	65,164	3,258	16	8	11	35	0.2051	0.1026	0.1410	0.4487
97-1	57	Sheridan Square	15711	104	84	261,873	3,118	25	12	36	73	0.2404	0.1154	0.3462	0.7019
97-1	62-A	Sonoma	15742	42	35	90,490	2,585	6	3	9	18	0.1429	0.0714	0.2143	0.4286
97-1	62-B	Sonoma	15814	38	38	121,623	3,201	8	5	6	19	0.2105	0.1316	0.1579	0.5000
97-1	63	Mendocino	15743	88	88	258,916	2,942	12	9	22	43	0.1364	0.1023	0.2500	0.4886
97-1	64	Saratoga	15744	86	77	246,240	3,198	20	8	22	50	0.2326	0.0930	0.2558	0.5814
97-1	65-A	Brentwood	15745	71	71	251,321	3,540	14	11	9	34	0.1972	0.1549	0.1268	0.4789
97-1	65-B	Brentwood	15978	62	51	180,671	3,543	8	6	19	33	0.1290	0.0968	0.3065	0.5323
97-1	66-A	Huntington	15746	10	10	41,960	4,196	0	0	6	6	0.0000	0.0000	0.6000	0.6000
97-1	66-B	Huntington	15801	8	8	34,138	4,267	0	2	4	6	0.0000	0.2500	0.5000	0.7500
97-1	66-C	Huntington	15802	11	11	47,097	4,282	0	1	1	2	0.0000	0.0909	0.0909	0.1818
97-1	66-D	Huntington	15803	11	11	47,391	4,308	0	0	0	0	0.0000	0.0000	0.0000	0.0000
97-1	66-E	Huntington	15804	12	12	50,472	4,206	2	2	2	6	0.1667	0.1667	0.1667	0.5000
97-1	67	Cambria	15747	53	53	261,195	4,928	13	13	19	45	0.2453	0.2453	0.3585	0.8491
97-1	69	Concorde	15872	113	101	344,366	3,410	26	12	44	82	0.2301	0.1062	0.3894	0.7257
97-1	70	Barrington	15873	126	126	351,298	2,788	24	15	24	63	0.1905	0.1190	0.1905	0.5000
97-1	71	Kelsey Lane	15874	134	125	327,593	2,621	23	21	45	89	0.1716	0.1567	0.3358	0.6642
97-1	73	Wisteria	15876	164	164	329,142	2,007	42	19	31	92	0.2561	0.1159	0.1890	0.5610
97-1	78	Santa Venetia	15972	96	76	202,486	2,664	30	20	28	78	0.3125	0.2083	0.2917	0.8125
97-1	79	Mendocino North	15973	93	71	210,315	2,962	23	11	21	55	0.2473	0.1183	0.2258	0.5914
97-1	80	Miramar	15974	66	62	209,678	3,382	23	13	18	54	0.3485	0.1970	0.2727	0.8182
97-1	83	Monterey	15977	127	127	293,026	2,307	48	14	28	90	0.3780	0.1102	0.2205	0.7087
97-1	84-B	Huntington Collection	15980	13	13	58,475	4,498	2	0	2	4	0.1538	0.0000	0.1538	0.3077
97-1	84-C	Huntington Collection	16064	17	17	71,595	4,211	3	1	6	10	0.1765	0.0588	0.3529	0.5882
97-1	84-D	Huntington Collection	16065	15	15	67,172	4,478	2	1	2	5	0.1333	0.0667	0.1333	0.3333
97-1	84-E	Huntington Collection	16159	14	14	62,508	4,465	4	3	5	12	0.2857	0.2143	0.3571	0.8571
97-1	84-F	Huntington Collection	16160	10	10	45,353	4,535	1	0	5	6	0.1000	0.0000	0.5000	0.6000
97-1	84-G	Huntington Collection	16161	12	12	53,341	4,445	0	1	4	5	0.0000	0.0833	0.3333	0.4167
97-1	84-H	Huntington Collection	16162	15	14	62,828	4,488	2	2	2	6	0.1333	0.1333	0.1333	0.4000
97-1	84-I	Huntington Collection	16185	8	0	0		1	0	1	2	0.1250	0.0000	0.1250	0.2500
97-1	84-J	Huntington Collection	15979	8	8	30,994	3,874	2	0	2	4	0.2500	0.0000	0.2500	0.5000
97-1	85-A	Bel Air	16076	68	41	147,938	3,608	9	13	20	42	0.1324	0.1912	0.2941	0.6176
97-1	85-B	Bel Air	16077	53	29	108,567	3,744	9	6	19	34	0.1698	0.1132	0.3585	0.6415
97-1	86-A	Manchester	16078	42	25	95,757	3,830	5	6	12	23	0.1190	0.1429	0.2857	0.5476
97-1	86-B	Manchester	16086	26	26	99,025	3,809	13	4	5	22	0.5000	0.1538	0.1923	0.8462
97-1	86-C	Manchester	16087	27	27	104,163	3,858	6	6	12	24	0.2222	0.2222	0.4444	0.8889
97-1	87	Rutherford	16079	99	96	254,426	2,650	7	6	15	28	0.0707	0.0606	0.1515	0.2828
97-1	89	Triana	16081	92	91	314,469	3,456	10	5	10	25	0.1087	0.0543	0.1087	0.2717
97-1	90-A	Alder Creek	16082	51	50	126,873	2,537	10	6	15	31	0.1961	0.1176	0.2941	0.6078

Appendix "B"

Tustin Unified School District
 Student Generation Rate Computations - Dwelling Units Permitted from Project Inception through December 31, 2020

CFD	Project Number	Project Name	Tract No.	Permitted Dwelling Units	Permitted D/Us with Sq Ft	Permitted Square Footage	Average Square Footage	Student Totals				Student Generation Rates			
								Grades K-5	Grades 6-8	Grades 9-12	Grades K-12	Grades K-5	Grades 6-8	Grades 9-12	Grades K-12
97-1	90-B	Alder Creek	16088	80	56	144,687	2,584	22	17	18	57	0.2750	0.2125	0.2250	0.7125
97-1	91-A	Tiburon	16083	12	12	26,159	2,180	4	0	4	8	0.3333	0.0000	0.3333	0.6667
97-1	91-B	Tiburon	16172	10	10	21,456	2,146	3	3	1	7	0.3000	0.3000	0.1000	0.7000
97-1	91-D	Tiburon	16173	11	11	24,683	2,244	2	4	2	8	0.1818	0.3636	0.1818	0.7273
97-1	91-E	Tiburon	16174	13	13	27,544	2,119	1	1	6	8	0.0769	0.0769	0.4615	0.6154
97-1	91-F	Tiburon	16175	12	12	26,174	2,181	3	1	2	6	0.2500	0.0833	0.1667	0.5000
97-1	91-G	Tiburon	16176	12	12	26,361	2,197	0	1	6	7	0.0000	0.0833	0.5000	0.5833
97-1	95	Mericort	16644	79	79	164,688	2,085	17	5	19	41	0.2152	0.0633	0.2405	0.5190
97-1	98	Montellena	16811	68	68	167,021	2,456	18	19	22	59	0.2647	0.2794	0.3235	0.8676
City	130	Sheldon	17507	103	103	216,519	2,102	20	4	4	28	0.1942	0.0388	0.0388	0.2718
City	131	Huntley	17507	77	77	219,481	2,850	27	5	4	36	0.3506	0.0649	0.0519	0.4675
City	132	Crawford	17507	96	96	332,073	3,459	39	12	3	54	0.4063	0.1250	0.0313	0.5625
City	133	Stafford	17507	98	98	372,719	3,803	29	5	2	36	0.2959	0.0510	0.0204	0.3673
Total Single-Family Detached (SFDs):				7,637	5,329	17,006,368	3,191	1,588	896	1,464	3,948	0.2079	0.1173	0.1917	0.5170
All Dwelling Types:				18,619	11,990	27,396,810	2,285	3,110	1,684	2,579	7,373	0.1670	0.0904	0.1385	0.3960
Weighted Average - Multi-Family				10,982	6,661	10,390,442	1,560	1,522	788	1,115	3,425	0.1386	0.0718	0.1015	0.3119

Appendix C: Future Development Projects

Appendix "C"

**Tustin Unified School District
Pending and Future Development Areas - Unmitigated**

General TUSD Location	Data Source	Project Status	Proposed Dwelling Type	Residential Land Use	Total Project D/Us	Permitted Prior to 1/1/2020	Net Future Unmitigated D/Us	Estimated Assessable Space Per Dwelling Unit
City of Tustin - Future Projects: ⁽²⁾⁽³⁾								
Enderle Center	Draft Housing Element - Oct 2021		Multi-family	Unidentified	413	0	413	1,500
The MarketPlace	Draft Housing Element - Oct 2021		Multi-family	Unidentified	900	0	900	1,500
Redhill Specific Plan	Draft Housing Element - Oct 2021		Multi-family	Unidentified	500	0	500	1,500 ⁽⁵⁾
Downtown Commercial Core ⁽⁴⁾	Draft Housing Element - Oct 2021		Multi-family	Unidentified	887	140	747	1,500 ⁽⁵⁾
Subtotal - City of Tustin ⁽³⁾					2,700	140	2,560	1,500
Irvine Business Center (IBC): ⁽³⁾								
C2E 2200 Synergy (#33B)	IBC Project List - May, 2021	Approved	Multi-family	Apartments/Condos	71	0	71	1,500 ⁽⁶⁾
Paseo Del Mar KB Homes (#42B)	IBC Project List - May, 2021	Under Construction	Multi-family	Apartments/Condos	93	0	93	1,500 ⁽⁶⁾
Subtotal - IBC ⁽³⁾					164	0	164	1,500
Santa Ana Metro-East Overlay Zone & Other TUSD Areas: ⁽³⁾								
#3 Central Point Mixed-Use 1801 East 4th St	Draft Housing Element - Oct 2021	Under review	Multi-family	5-Story Mixed Use	644	0	644	1,350 ⁽⁸⁾
#5 AMG Family Units 2114 First St. (#25) ⁽⁸⁾	Draft Housing Element - Oct 2021	Under Construction	Multi-family	6-Story Mixed use	552	0	552	1,350 ⁽⁸⁾
#4 Innovative Housing Opportunities (N & S)	Draft Housing Element - Oct 2021	Entitled	Multi-family	Affordable Units	160	0	160	1,350
Tava Development (Sexlinger Farmhouse)	Planning Dept's Website	Entitled	SFD	2,340-2,777 Sqft	24	0	24	2,500
Subtotal - Santa Ana ⁽³⁾					1,380		1,380	1,370
Total Future TUSD Residential Dwelling Units:					4,244		4,104	1,456 ⁽⁹⁾

(1) The plans/building permit information for selected multi-family projects located within the District were reviewed by SDFPA in order to estimate the assessable space likely to be realized from similar projects to be constructed in the future.

(2) Excludes Future Development identified in the Housing Element as being located in Tustin/MCAS as that development has been mitigated with the formation of CFD No. 15-2.

(3) Includes only those projects that are located within the boundaries of TUSD and have not yet been constructed or were not issued a building permit as of January, 1, 2021.

(4) Of the 887 Multi-family units identified in the Housing Element, 140 of those units are represented by the completed project called Vintage at Old Town.

(5) For unidentified projects, the average square footage assumes a 50/ 50 mix of apartments and "for sale units with assessable space of 1,250 per apartment unit and average square footage of 1,750 for future "for-sale" condo/townhome units.

(6) For the two projects located within the IBC, the average square footage was derived from the building permits issued in late 2019 for 38 dwelling units located within Project #42A.

(8) For the five and six-story residential and mixed-use projects expected to be developed within the the City of Santa Ana, the District estimates that the average assessable space per dwelling unit will be similar to the average assessable space computed for that portion of AMG Family Units for which permits were recently issued .

(9) Reflects the estimated weighted average of the 4,104 future unmitigated dwelling units expected to be constructed within District.

Appendix D: School Facilities Cost Estimates

Appendix D-1

TUSTIN UNIFIED SCHOOL DISTRICT SUMMARY OF ESTIMATED COSTS

	Prototype Grade K-5 Elementary School	Prototype Grades 6-12 Academy School
	<u>School</u>	<u>School</u>
SITE ACQUISITION & DEVELOPMENT:		
Required Usable Acreage	10.0	40.0
Estimated Site Acquisition Costs (Per Acre)	\$1,500,000	\$1,500,000
Total Site Acquisition Costs ⁽¹⁾	\$15,000,000	\$60,000,000
Site Development Costs		
(Incl off-site, service site & utility services)	\$100,000	
Total Site Acquisition & Site Development Costs	<u>\$1,000,000</u>	<u>\$4,000,000</u>
	\$16,000,000	\$64,000,000
SCHOOL CONSTRUCTION:		
Baseline Construction Cost Estimate ⁽²⁾	\$25,000,000	\$100,000,000
TOTAL ESTIMATED COST:	\$41,000,000	\$164,000,000
DESIGN CAPACITY OF SCHOOL FACILITY	550	1,200
COST PER STUDENT	\$74,545	\$136,667

(1) Land price reflects District current estimated "average" land acquisition costs for future unidentified school sites.

(2) Reflects District's current estimate of construction costs to construct school facilities to serve the design capacities as shown.

Appendix "D-2"

**Tustin Unified School District
Interim and Administrative Facilities Cost Estimates**

Per Student Cost of Interim Facilities:

Per Student Cost for K-5 Interim Housing:

Estimated four-year period for unhoused students.
Monthly charges assumed for 1.5 years as an average requirement.

Monthly charges:	\$850
Number of Periods:	18
Cost Per Classroom Unit	\$15,300
Plus Incidentals (Set-up)	<u>\$65,000</u>
Total Cost of Classroom	\$80,300
Students to be Housed	25
Cost Per Student	<u><u>\$3,212</u></u>

Per Student Cost for 6-8 Interim Housing:

Estimated four-year period for unhoused students.
Monthly charges assumed for 2.5 years as an average requirement.

Monthly charges:	\$850
Number of Periods:	30
Cost Per Classroom Unit	\$25,500
Plus Incidentals (Set-up)	<u>\$65,000</u>
Total Cost of Classroom	\$90,500
Students to be Housed	27
Cost Per Student	<u><u>\$3,352</u></u>

Per Student Cost for High School Interim Housing:

Estimated six-year period for unhoused students.
Monthly charges assumed for 2.5 years as an average requirement.

Monthly charges:	\$850
Number of Periods:	30
Cost Per Classroom Unit	\$25,500
Plus Incidentals (Set-up)	<u>\$65,000</u>
Total Cost of Classroom	\$90,500
Students to be Housed	27
Cost Per Student	<u><u>\$3,352</u></u>

Per Student Cost of Central Administrative Facilities:

Est Sqft. of Admin Facilities Required Per Student	4
Estimated Cost Per Sqft. of Construction	<u>\$225</u>
Current Administrative Facilities Cost per Student	<u><u>\$900</u></u>



EEO-ALL01W

EEO 1w. Detailed Census Occupation by Sex and Race/Ethnicity for Worksite Geography

Universe: Civilians employed at work 16 years and over
EEO Tabulation 2006-2010 (5-year ACS data)

Note: This is a modified view of the original table.

The EEO Tabulation is sponsored by four Federal agencies consisting of the Equal Employment Opportunity Commission (EEOC), the Employment Litigation Section of the Civil Rights Division at the Department of Justice (DOJ), the Office of Federal Contract Compliance Programs (OFCCP) at the Department of Labor, and the Office of Personnel Management (OPM).

Geography: Irvine city, California
Estimate: Estimate

Occupation Code	Residence to Work Place Flows	Subject	Total, race and ethnicity
Total, all occupations	Worksite Total	Total, both sexes	
Total, all occupations	Worksite Total	Number	216,375
Total, all occupations	Irvine city, California to Irvine city, California	Total, both sexes	
Total, all occupations	Irvine city, California to Irvine city, California	Number	42,265
Total, all occupations	Santa Ana city, California to Irvine city, California	Total, both sexes	
Total, all occupations	Santa Ana city, California to Irvine city, California	Number	19,910
Total, all occupations	Tustin city, California to Irvine city, California	Total, both sexes	
Total, all occupations	Tustin city, California to Irvine city, California	Number	7,495

Data are based on a sample and are subject to sampling variability. The degree of uncertainty for an estimate arising from sampling variability is represented through the use of a margin of error. The value shown here is the 90 percent margin of error. The margin of error can be interpreted roughly as providing a 90 percent probability that the interval defined by the estimate minus the margin of error and the estimate plus the margin of error (the lower and upper confidence bounds) contains the true value. In addition to sampling variability, the ACS estimates are subject to nonsampling error (for a discussion of nonsampling variability, see Accuracy of the Data). The effect of nonsampling error is not represented in these tables.

Source: U.S. Census Bureau, 2006-2010 American Community Survey

Explanation of Symbols:

An '***' entry in the margin of error column indicates that either no sample observations or too few sample observations were available to compute a standard error and thus the margin of error. A statistical test is not appropriate.

An '-' entry in the estimate column indicates that either no sample observations or too few sample observations were available to compute an estimate, or a ratio of medians cannot be calculated because one or both of the median estimates falls in the lowest interval or upper interval of an open-ended distribution.

An '-' following a median estimate means the median falls in the lowest interval of an open-ended distribution.

An '+' following a median estimate means the median falls in the upper interval of an open-ended distribution.

An '****' entry in the margin of error column indicates that the median falls in the lowest interval or upper interval of an open-ended

distribution. A statistical test is not appropriate.

An '*****' entry in the margin of error column indicates that the estimate is controlled. A statistical test for sampling variability is not appropriate.

An 'N' entry in the estimate and margin of error columns indicates that data for this geographic area cannot be displayed because the number of sample cases is too small.

An '(X)' means that the estimate is not applicable or not available.

The U.S. Census Bureau collects race data in accordance with guidelines provided by the U.S. Office of Management and Budget (OMB). Except for the total, all race and ethnicity categories are mutually exclusive. "Black" refers to Black or African American; "AIAN" refers to American Indian and Alaska Native; and "NHPI" refers to Native Hawaiian and Other Pacific Islander. The reference to "Hawaii only" indicates that these columns are only tabulated for areas in the state of Hawaii. "Balance of Not Hispanic or Latino" includes the balance of non-Hispanic individuals who reported multiple races or reported Some Other Race alone. For more information on race and Hispanic origin, see the Subject Definitions at http://www.census.gov/acs/www/data_documentation/documentation_main/.

Race and Hispanic origin are separate concepts on the American Community Survey. "White alone Hispanic or Latino" includes respondents who reported Hispanic or Latino origin and reported race as "White" and no other race. "All other Hispanic or Latino" includes respondents who reported Hispanic or Latino origin and reported a race other than "White," either alone or in combination. To get a total for "Hispanic or Latino," add the two columns for "White alone Hispanic or Latino" and "All other Hispanic or Latino."

Occupation codes are 4-digit codes and are based on Standard Occupational Classification 2010.



EEO-ALL01W

EEO 1w. Detailed Census Occupation by Sex and Race/Ethnicity for Worksite Geography

Universe: Civilians employed at work 16 years and over
EEO Tabulation 2006-2010 (5-year ACS data)

Note: This is a modified view of the original table.

The EEO Tabulation is sponsored by four Federal agencies consisting of the Equal Employment Opportunity Commission (EEOC), the Employment Litigation Section of the Civil Rights Division at the Department of Justice (DOJ), the Office of Federal Contract Compliance Programs (OFCCP) at the Department of Labor, and the Office of Personnel Management (OPM).

Geography: Santa Ana city, California
Estimate: Estimate

Occupation Code	Residence to Work Place Flows	Subject	Total, race and ethnicity
Total, all occupations	Worksite Total	Total, both sexes	
Total, all occupations	Worksite Total	Number	154,675
Total, all occupations	Irvine city, California to Santa Ana city, California	Total, both sexes	
Total, all occupations	Irvine city, California to Santa Ana city, California	Number	6,390
Total, all occupations	Santa Ana city, California to Santa Ana city, California	Total, both sexes	
Total, all occupations	Santa Ana city, California to Santa Ana city, California	Number	41,630
Total, all occupations	Tustin city, California to Santa Ana city, California	Total, both sexes	
Total, all occupations	Tustin city, California to Santa Ana city, California	Number	5,460

Data are based on a sample and are subject to sampling variability. The degree of uncertainty for an estimate arising from sampling variability is represented through the use of a margin of error. The value shown here is the 90 percent margin of error. The margin of error can be interpreted roughly as providing a 90 percent probability that the interval defined by the estimate minus the margin of error and the estimate plus the margin of error (the lower and upper confidence bounds) contains the true value. In addition to sampling variability, the ACS estimates are subject to nonsampling error (for a discussion of nonsampling variability, see Accuracy of the Data). The effect of nonsampling error is not represented in these tables.

Source: U.S. Census Bureau, 2006-2010 American Community Survey

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Occupation codes are 4-digit codes and are based on Standard Occupational Classification 2010.



EEO-ALL01W

EEO 1w. Detailed Census Occupation by Sex and Race/Ethnicity for Worksite Geography

Universe: Civilians employed at work 16 years and over
EEO Tabulation 2006-2010 (5-year ACS data)

Note: This is a modified view of the original table.

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Geography: Tustin city, California
Estimate: Estimate

Occupation Code	Residence to Work Place Flows	Subject	Total, race and ethnicity
Total, all occupations	Worksite Total	Total, both sexes	
Total, all occupations	Worksite Total	Number	37,900
Total, all occupations	Irvine city, California to Tustin city, California	Total, both sexes	
Total, all occupations	Irvine city, California to Tustin city, California	Number	2,815
Total, all occupations	Santa Ana city, California to Tustin city, California	Total, both sexes	
Total, all occupations	Santa Ana city, California to Tustin city, California	Number	4,490
Total, all occupations	Tustin city, California to Tustin city, California	Total, both sexes	
Total, all occupations	Tustin city, California to Tustin city, California	Number	6,325

Data are based on a sample and are subject to sampling variability. The degree of uncertainty for an estimate arising from sampling variability is represented through the use of a margin of error. The value shown here is the 90 percent margin of error. The margin of error can be interpreted roughly as providing a 90 percent probability that the interval defined by the estimate minus the margin of error and the estimate plus the margin of error (the lower and upper confidence bounds) contains the true value. In addition to sampling variability, the ACS estimates are subject to nonsampling error (for a discussion of nonsampling variability, see Accuracy of the Data). The effect of nonsampling error is not represented in these tables.

Source: U.S. Census Bureau, 2006-2010 American Community Survey

Explanation of Symbols:

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distribution. A statistical test is not appropriate.

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Occupation codes are 4-digit codes and are based on Standard Occupational Classification 2010.