



# San Juan Unified School District Facilities Committee

- |   |  |   |
|---|--|---|
| <input type="checkbox"/> Melinda Avey, Chair        | <input type="checkbox"/> Tina Cooper         | <input type="checkbox"/> Murad "Moe" Sarama |
| <input type="checkbox"/> Lupita Alcala, Asst. Chair | <input type="checkbox"/> Ashley Freer        | <input type="checkbox"/> Steve Ward         |
| <input type="checkbox"/> Josh Alvarado              | <input type="checkbox"/> Peter McKane        |   |
| <input type="checkbox"/> Rachel Andrakowicz         | <input type="checkbox"/> Zachary Morton      |   |
| <input type="checkbox"/> Frank Cockrell             | <input type="checkbox"/> Jodi Mulligan-Pfile |   |

## We commit to:

- |   |   |
|---|---|
| o Being responsive to the needs of students                       | o Clearly defining and agreeing upon mission                                    |
| o Conducting meetings that are: Effective, Efficient and Decisive | o Members having open minds and being creative                                  |
| o Focusing on solving problems                                    | o Abide by Brown Act concept and principles                                     |
| o Working together through the committee chair                    | o Being responsive to the direction of the Board as a whole                     |
| o Recognizing the committee's role as a recommending body         | o Members being polite, respectful, and supportive of other's time and opinions |
| o Differentiating between fact and opinion                        |   |

## AGENDA

Tuesday, April 2, 2024

District Office Board Room – 3738 Walnut Avenue, Carmichael, CA 95608

### I. CALL TO ORDER – 6:30 p.m.

### II. VISITOR COMMENTS\*

### III. BUSINESS ITEMS

- |   |                  |
|---|------------------|
| <b>1. Approval of the Minutes – March 5 , 2024 – Action</b><br>(Material Provided: Pages 2-3) | <b>(Avey)</b>    |
| <b>2. Board Member Report</b>   | <b>(B. Avey)</b> |
| <b>3. Chair Report</b>  | <b>(Avey)</b>    |
| <b>4. Staff Report</b>  | <b>(Camarda)</b> |
| <b>5. Developer Fee Justification Study</b><br>(Material Provided: Pages 4-50)                | <b>(Camarda)</b> |
| <b>6. Bond Opinion Research Results</b><br>(Material Provided: Pages 51-62)                   | <b>(Camarda)</b> |

### IV. ADJOURNMENT – 8:00 p.m.

\* Public comments are welcome at Facilities Committee meetings. Each agenda allows time for visitor comments at the beginning of the meeting, as well as during consideration of specific agenda items. To give everyone a chance to be heard, we ask that you limit your comments to two minutes. To speak to the Committee, you must fill out a "Request to Address the Facilities Committee" card, which is available at each meeting. This card will be given to the Chair. You will be called at the appropriate time.



# San Juan Unified School District Facilities Committee

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| <input checked="" type="checkbox"/> Melinda Avey, Chair | <input type="checkbox"/> Tina Cooper                    | <input type="checkbox"/> Murad "Moe" Sarama    |
| <input type="checkbox"/> Lupita Alcala, Asst. Chair     | <input checked="" type="checkbox"/> Ashley Freer        | <input checked="" type="checkbox"/> Steve Ward |
| <input checked="" type="checkbox"/> Josh Alvarado       | <input checked="" type="checkbox"/> Peter McKane        | <input type="checkbox"/> Fedros Yavrom         |
| <input type="checkbox"/> Rachel Andrakowicz             | <input checked="" type="checkbox"/> Zachary Morton      |  |
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| <input type="checkbox"/> Focusing on solving problems                                    | <input type="checkbox"/> Abide by Brown Act concept and principles                                     |
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| <input type="checkbox"/> Recognizing the committee's role as a recommending body         | <input type="checkbox"/> Members being polite, respectful, and supportive of other's time and opinions |
| <input type="checkbox"/> Differentiating between fact and opinion                        |  |

## MINUTES

Tuesday, March 5, 2024

District Office Conference Room A – 3738 Walnut Avenue, Carmichael, CA 95608

### I. CALL TO ORDER – 6:30 p.m.

The meeting was called to order by Ms. Avey at 6:33 p.m.

### II. VISITOR COMMENTS\*

There were none.

### III. BUSINESS ITEMS

#### 1. Approval of the Minutes – February 6, 2024 - Action (Avey) (Material Provided: Pages 2-4)

As so moved by Mr. Morton, seconded by Mr. Cockrell. The motion passed, with Ms. Freer abstaining.

#### 2. Board Member Report (Hernandez)

Mr. Hernandez announced that tonight is vote night; committee member Mr. Sarama is running. Also on the ballot tonight is Proposition 28, Arts and Music in Schools Funding, and he is hopeful that it will pass so that every student will have access to arts and music programs in their schools.

#### 3. Chair Report/Ad Hoc Committee Report (Avey) (Material Provided: Pages 5-12)

Ms. Avey reported that she and Ms. Alcala presented the committee's work and recommendation on Non-Permitted Use of Facilities During Non-School Hours at the February 13, 2024, board meeting and the item has been agenzized for the April 9, 2024, board meeting for board discussion. Ms. Avey also mentioned she wants to have a review of committee bylaws, or a "committee orientation" at the next meeting so committee members are aware of their roles within the committee.

#### 4. Staff Report (Camarda)

Mr. Camarda reported that he recently walked the new Arcade Middle School campus; students are excited about the progress and eager for the new school to open. He also visited the new Katherine Johnson Middle School campus, and there are two new buildings currently going up.

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## 5. Strategic Planning Feedback Session

(Allen/Rovai Gregory)

Ms. Rovai Gregory, Director of Family Engagement and Partnership Development, walked the committee through a feedback session to solicit comments via a written questionnaire on the district's proposed strategic plan. The plan emphasizes four major strategic directions: to advance student success, prioritize equitable practices, enhance employee support systems, and to invest in efforts to assist students and families to empower themselves.

Ms. Rovai Gregory shared the timeline for feedback gathering and action planning. The school board should receive a presentation on May 14, 2024, and May 28, 2024.

Committee members made comments and asked if Ms. Rovai Gregory could come back at a future meeting to share her results with them.

## 6. Facilities Master Plan Update Workshop

(AECOM)

(Material Provided: Pages 13-21)

Director of Facilities, Construction and Modernization, Nic Arps, opened the presentation by giving the committee a recap of the Facilities Master Plan Update project. He then introduced staff from AECOM, Ms. Samara Lull, Program Manager, and staff from JKAE Design, Mr. Derek Labrecque, Partner.

Ms. Samara and Mr. Labrecque led the committee through a presentation exhibiting the progress done thus far on the Facilities Master Plan update, and what the next steps will be. The update's five guiding principles to support the district's LCAP have been defined as: schools as center of community; supporting the whole learner; education for all learners; college and career readiness; and equity, integration, inclusion. Next steps will include internal staff surveys for all staff, site meetings, and community engagement via community meetings and community surveys.

Ms. Mulligan-Pfile said she appreciates the district thinking ahead and keeping sustainability in mind.

Mr. Labrecque went over some practices and principles that must be followed now, i.e., building code, California Green, etc. All new construction requires new energy, and in his opinion, it is an opportunity to have a return on investment by reducing operating costs.

Mr. Camarda added some examples of sustainability include solar, landscaping and irrigation.

Mr. Cockrell said that outdoor learning sometimes gets lost, and he appreciates seeing that it's included.

Ms. Lull reiterated that a Facility Condition Assessment ("FCA") will be done for all sites. The current focus is assessing needs.

Ms. Freer asked about the site safety plans and how they are incorporated, and if IT systems are included in this plan.

Mr. Camarda replied, camera systems will be worked into the Facilities Master Plan Update. All stakeholders will be brought to the table, i.e., Nutrition Services. The assessments will show us all systems and their useful life.

Mr. Alvarado suggested quicker and broader advertisement if the district plans to get a good amount of community engagement.

Mr. Camarda said that messaging will start as soon as the test survey comes back.

Mr. Hernandez suggests the grading of sites be a part of a future agenda.

Ms. Avey thanked the presenters for their time and said she is looking forward to a future update on this project.

## IV. ADJOURNMENT – 8:00 p.m.

There being no further business or discussion, the meeting was adjourned at 8:01 p.m. by Ms. Avey.

MARCH 2024

2024 DEVELOPER FEE JUSTIFICATION STUDY  
FOR  
SAN JUAN UNIFIED SCHOOL DISTRICT

MELISSA BASSANELLI,  
*SUPERINTENDENT*

*PREPARED BY*

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- C. **Site Development Costs**
- D. **Index Adjustment on the Assessment for Development – State Allocation Board Meeting of January 24, 2024**
- E. **Annual Adjustment to School Facility Program Grants**
- F. **Impacts of the Sunrise Tomorrow Specific Plan**

DRAFT

## Executive Summary

This Developer Fee Justification Study demonstrates that the San Juan Unified School District requires the full statutory impact fee to accommodate impacts from development activity.

A fee of \$4.79 per square foot for residential construction and a fee of \$0.78 per square foot for commercial/industrial construction is currently assessed on applicable permits pulled in the District. The new fee amounts are **\$5.17** per square foot for residential construction and **\$0.84\*** per square foot for commercial/industrial construction. This proposed increase represents \$0.38 per square foot and \$0.06 per square foot for residential and commercial/industrial construction, respectively.

The following table shows the impacts of the new fee amounts:

**Table 1**  
**San Juan Unified**  
**Developer Fee Collection Rates**

<b>Totals</b>	<u>Previous</u>	<u>New</u>	<u>Change</u>
Residential	\$4.79	\$5.17	\$0.38
Commercial/Ind.	\$0.78	\$0.84	\$0.06

\*except for Rental Self Storage facilities in which a fee of \$0.05 per square foot is justified.

The total projected number of housing units to be built over the next five years is 945. The average area per unit is 1,885 square feet. This Study demonstrates a need of \$5.31 per square foot for residential construction.

## Background

Education Code Section 17620 allows school districts to assess fees on new and replacement residential and new and replacement commercial construction within their respective boundaries. These fees can be collected without special city or county approval, to fund the construction of new school facilities necessitated by the impact of residential and commercial development activity. In addition, these fees can also be used to fund the reconstruction of school facilities to accommodate students generated from new development projects. Fees are collected immediately prior to the time of the issuance of a building permit by the City or the County.

As new development generates students, additional school facilities or modernization of existing facilities will be needed to house the new students. Because of the high cost associated with constructing school facilities and the District's limited budget, outside funding sources are required for future school construction. State and local funding sources for the construction and/or reconstruction of school facilities are limited.

The authority cited in Education Code Section 17620 states in part "... the governing board of any school district is authorized to levy a fee, charge, dedication or other form of requirement against any development project for the construction or reconstruction of school facilities." The legislation originally established the maximum fee rates at \$1.50 per square foot for residential construction and \$0.25 per square foot for commercial/industrial construction. Government Code Section 65995 provides for an inflationary increase in the fees every two years based on the changes in the Class B construction index. As a result of these adjustments, the fees authorized by Education Code 17620 are currently **\$5.17** per square foot of residential construction and **\$0.84** per square foot of commercial or industrial construction.

## Purpose and Intent

Prior to levying developer fees, a district must demonstrate and document that a reasonable relationship exists between the need for new or reconstructed school facilities and residential, commercial and industrial development. The justification for levying fees is required to address three basic links between the need for facilities and new development. These links or nexus are:

Burden Nexus: A district must identify the number of students anticipated to be generated by residential, commercial and industrial development. In addition, the district shall identify the school facility and cost impact of these students.

Cost Nexus: A district must demonstrate that the fees to be collected from residential, commercial and industrial development will not exceed the cost of providing school facilities for the students to be generated from the development.

Benefit Nexus: A district must show that the construction or reconstruction of school facilities to be funded by the collection of developer fees will benefit the students generated by residential, commercial and industrial development.

The purpose of this Study is to document if a reasonable relationship exists between residential, commercial and industrial development and the need for new and/or modernized facilities in the San Juan Unified School District.

Following in this Study will be figures indicating the current enrollment and the projected development occurring within the attendance boundaries of the San Juan Unified School District. The students generated will then be loaded into existing facilities to the extent of available space. Thereafter, the needed facilities will be determined and an estimated cost will be assigned. The cost of the facilities will then be compared to the area of residential, commercial and industrial development to determine the amount of developer fees justified.

**Enrollment and Impacts**

In 2023/2024 the District’s total enrollment (CBEDS) was 38,488 students. The enrollment by grade level is shown here in Table 2.

**Table 2**  
**San Juan Unified**  
**CURRENT ENROLLMENT**

<b>Grade</b>	<b>2023/2024</b>
TK/K	3,095
1	2,773
2	2,908
3	2,931
4	2,961
5	2,923
6	2,796
<b>TK-6 Total</b>	<b>20,387</b>
7	2,899
8	2,937
<b>7-8 Total</b>	<b>5,836</b>
9	2,947
10	3,115
11	2,988
12	3,215
<b>9-12 Total</b>	<b>12,265</b>
<b>TK-12 Total</b>	<b>38,488</b>

This data will be the basis for the enrollment impacts which will be presented later after a review of the development projections and the student generation factors.

Student Generation Factor

In determining the impact of new development, the District is required to show how many students will be generated from the new developments. In order to ensure that new development is paying only for the impact of those students that are being generated by new homes and businesses, the student generation factor is applied to the number of new housing units to determine development-related impacts.

The same analysis and student generation rate applicable to new development is applicable to replacement residential and commercial development. In determining the impact of replacement development, the District is required to show how many students will be generated from the replacement developments. In order to ensure that replacement development is paying only for the impact of those students that are being generated by homes and businesses replacing other previously existing homes and businesses, the student generation factor is applied to the number of replacement housing units to determine development-related impacts.

The student generation factor identifies the number of students per housing unit and provides a link between residential construction projects and projections of enrollment. The State-wide factor used by the Office of Public School Construction is 0.70 for grades TK-12. For the purposes of this Study we will use the local factors to determine the students generated from new housing developments. This was done by comparing the number of housing units in the school district to the number of students in the school district as of the 2020 Census. Table 3 shows the student generation factors for the various grade groupings.

**Table 3**  
**San Juan Unified**  
**STUDENT GENERATION FACTORS**

<u>Grades</u>	<u>Students per Household</u>
TK-6	0.14605
7-8	0.04344
9-12	0.08909
<b>Total</b>	<b>0.27858</b>

When using the Census data to determine the average district student yield rate, it is not possible to determine which students were living in multi-family units versus single family units. Therefore, only the total average yield rate is shown. The Census data does indicate that **57.6%** of the total housing units within the district boundaries are single family units. It is reasonable to assume that the construction of new housing units would be similar to the current housing stock, which was confirmed by the various planning departments within the school district boundaries, and therefore the overall student generation rate will be used to determine student yields from the projected developments.

#### New Residential Development Impacts

The San Juan Unified School District has experienced an average new residential construction rate of approximately 189 units per year over the past four years. This was determined by reviewing the residential permits pulled and school development impact fees paid to the District. After contacting each of the planning departments within the school district boundaries, it was determined that the residential construction rate over the next five years will average 189 units per year. Projecting the average rate forward, we would expect that 945 units of residential housing will be built within the District boundaries over the next five years as shown here:

#### **New Development Housing Projections**

<u>Planning Area</u>	<u># of Units</u>
City of Citrus Heights	615
Sacramento County	330
<b>Total</b>	<b>945</b>

To determine the impact of residential development, a student projection is done. Applying the student generation factor of 0.2786 to the projected 945 units of residential housing, we expect that 263 students will be generated from the new residential construction over the next five years. This includes 138 elementary school students, 41 middle school students, and 84 high school students.

The following table shows the projected impact of new development. The students generated by development will be utilized to determine the facility cost impacts to the school district.



**Table 4**  
**San Juan Unified**  
**DEVELOPMENT IMPACT ANALYSIS**

<u>Grades</u>	<u>Generation Rate</u>	<u>Students Generated</u>
TK to 6	0.1460	138
7 to 8	0.0434	41
9 to 12	0.0891	84
<b>Totals</b>	<b>0.2786</b>	<b>263</b>

**Existing Facility Capacity**

To determine the need for additional school facilities, the capacity of the existing facilities must be identified and compared to current and anticipated enrollments. The District’s existing building capacity will be calculated using the State classroom loading standards shown in Table 6. The following types of “support-spaces” necessary for the conduct of the District’s comprehensive educational program, are not included as “teaching stations,” commonly known as “classrooms” to the public:

**Table 5**  
**List of Core and Support Facilities**

Library	Resource Specialist
Multipurpose Room	Gymnasium
Office Area	Lunch Room
Staff Workroom	P.E. Facilities

Because the District requires these types of support facilities as part of its existing facility and curriculum standards at its schools, new development’s impact must not materially or adversely affect the continuance of these standards. Therefore, new development cannot require that the District house students in these integral support spaces.

Classroom Loading Standards

The following maximum classroom loading-factors are used to determine teaching-station “capacity,” in accordance with the State legislation and the State School Building Program. These

capacity calculations are also used in preparing and filing the baseline school capacity statement with the Office of Public School Construction.

**Table 6**  
**State Classroom Loading Standards**

TK/Kindergarten	25 Students/Classroom
1 <sup>st</sup> -3 <sup>rd</sup> Grades	25 Students/Classroom
4 <sup>th</sup> -6 <sup>th</sup> Grades	25 Students/Classroom
7 <sup>th</sup> -8 <sup>th</sup> Grades	27 Students/Classroom
9 <sup>th</sup> -12 <sup>th</sup> Grades	27 Students/Classroom

Existing Facility Capacity

The State determines the baseline capacity by either loading all permanent teaching stations plus a maximum number of portables equal to 25% of the number of permanent classrooms or by loading all permanent classrooms and only portables that are owned or have been leased for over 5 years. As allowed by law and required by the State, facility capacities are calculated by identifying the number of teaching stations at each campus. All qualified teaching stations were included in the calculation of the capacities at the time the initial inventory was calculated. To account for activity and changes since the baseline was established in 1998/99, the student grants (which represent the seats added either by new schools or additions to existing schools) for new construction projects funded by OPSC have been added. Using these guidelines the District’s current State calculated capacity is shown in Table 7.

**Table 7**  
**San Juan Unified**  
**Summary of Existing Facility Capacity**

<u>School Facility</u>	Total District <u>Capacity</u>
Grades TK-6	22,678
Grades 7-8	6,263
Grades 9-12	13,227
<b>Totals</b>	<b>42,168</b>

The District has not participated in the State Building Program for any new construction projects and therefore has not established a State capacity as of this time. The State capacity can sometimes be lower than the District capacity as the State capacity limits the number of portable classrooms that are counted towards the total capacity.

As Table 7 shows, the total District capacity of the District facilities is 42,168 students.

Unhoused Students by State Housing Standards

This next table compares the facility capacity with the space needed to determine if there is available space for new students from the projected developments. The space needed was determined by reviewing the historic enrollments over the past four years along with the projected enrollment in five years to determine the number of seats needed to house the students within the existing homes. The seats needed were determined individually for each grade grouping. The projected enrollment in the space needed analysis did not include the impact of any new housing units.

**Table 8**  
**San Juan Unified**  
**Summary of Available District Capacity**

<u>School Facility</u>	<u>District Capacity</u>	<u>Space Needed</u>	<u>Available Capacity</u>
Grades TK-6	22,678	21,752	926
Grades 7-8	6,263	6,031	232
Grades 9-12	13,227	12,640	587
<b>Totals</b>	<b>42,168</b>	<b>40,423</b>	<b>1,745</b>

The District capacity of 42,168 is more than the space needed of 40,423, assuming the existing facilities remain in sufficient condition to maintain existing levels of service. The difference is 1,745 students.

**Calculation of Development’s Fiscal Impact on Schools**

This section of the Study will demonstrate that a reasonable relationship exists between residential, commercial/industrial development and the need for school facilities in the San Juan Unified School District. To the extent this relationship exists, the District is justified in levying developer fees as authorized by Education Code Section 17620.

### New Construction Costs

The available capacity on the previous page indicates that additional new school facilities are not needed. Therefore, the costs for new schools or new classrooms at existing schools are not included in the study. However, it is possible that development in a specific area can exceed the capacity of the neighborhood school. In this instance the district may decide to build new facilities instead of housing students in a school that is farther away. In this case, the use of the fees is still justified as the students generated by the new development are being housed in new facilities which directly benefits the students from new development.

### Reconstruction/Modernization Costs

In addition to any new facilities needed, there is also a need to reconstruct or modernize existing facilities in order to maintain the existing levels of service as students from new development continue to arrive in the District's facilities. In order to generate capacity, it may also be necessary to reopen closed school facilities. Such reopening often requires reconstruction in order to provide the District's existing level of service. For purposes of this report, the analysis of modernization/reconstruction includes the possible reopening and refurbishing of closed or unused school facilities.

California has made a significant investment in school facilities through grants provided to help extend the useful life of public schools. The State's largest funding source for public school modernization projects, the School Facilities Program (SFP), requires a minimum local funding contribution of 40% of SFP-eligible costs. The State may provide up to 60% of the eligible costs at those times that State funding is available. However, SFP modernization grants frequently, if not usually, fall short of providing 60% of the actual costs for major modernizations. In the best cases, developer fees can help meet the District's required 40% local share. In many cases, developer fees may be necessary to supplement both the State's and the school district's contribution to a project.

Buildings generate eligibility for State reconstruction/modernization funding once they reach an age of 25 years old for permanent buildings and 20 years old for portables. The usable life of school facilities is an important consideration in determining district facility needs into the future. The specific time when the projected residential developments will be built cannot be precisely predicted. Some new homes may be immediately occupied by families with school aged children, while others may be immediately occupied who will have school-aged children in five to ten years. As a result of these variables, for each new home, the District must be prepared to house the students

residing there for an extended period of time. Students generated by the next five years of development will need to be accommodated in District schools for a significant amount of time that could exceed twenty years. Thus, the District will need to ensure that it has facilities in place for future decades.

As evidenced by the State Building program’s use of the criteria that buildings older than twenty-five years (and portables older than twenty years) are eligible for modernization funds, school buildings require reconstruction/modernization to remain in use for students beyond the initial twenty to twenty-five years of life of those buildings. To the extent that the District has buildings older than twenty to twenty-five years old, the point will be reached without reconstruction/modernization that those buildings will no longer be able to provide the existing level of service to students, and may, in some circumstances, need to be closed entirely for health and safety reasons. However, because of the new development, reconstruction/modernization must occur in order to have available school housing for the students generated from development.

The following table shows the District’s eligibility for modernization/reconstruction funding in the State Building Program.

**Table 9**

**Modernization Project Needs**

<u>School</u>	<u>Eligible Modernization Grants</u>				<u>State Funding</u>	<u>District Share</u>	<u>Project Total</u>
	<u>Elem</u>	<u>Middle</u>	<u>High</u>	<u>Spec Ed</u>			
Del Paso Manor	90	0	0	0	\$639,068	\$426,046	\$1,065,113
Dyer Kelly	410	0	0	0	\$2,615,862	\$1,743,908	\$4,359,769
Grand Oaks	100	0	0	0	\$710,075	\$473,383	\$1,183,458
Greer	395	0	0	0	\$2,520,159	\$1,680,106	\$4,200,265
Kenneth	383	0	0	0	\$2,443,597	\$1,629,065	\$4,072,662
Leggette	675	0	0	0	\$4,306,601	\$2,871,068	\$7,177,669
Lichen	330	0	0	0	\$2,105,450	\$1,403,634	\$3,509,083
Mariposa	150	0	0	0	\$993,053	\$662,036	\$1,655,088
Northridge	111	0	0	0	\$734,859	\$489,906	\$1,224,765
Sierra Oaks	100	0	0	0	\$710,075	\$473,383	\$1,183,458
Starr King	634	172	0	0	\$5,203,521	\$3,469,014	\$8,672,535
Sunrise	100	0	0	0	\$710,075	\$473,383	\$1,183,458
Andrew Carnegie Middle	0	103	0	0	\$719,919	\$479,946	\$1,199,864
Arden Middle	0	830	0	0	\$5,590,465	\$3,726,977	\$9,317,442
Barrett Middle	0	672	0	0	\$4,526,256	\$3,017,504	\$7,543,760
Sylvan Middle	0	505	0	0	\$3,401,428	\$2,267,619	\$5,669,046
Casa Roble High	0	0	275	0	\$2,408,849	\$1,605,899	\$4,014,748
Del Campo High	0	0	185	0	\$1,682,029	\$1,121,353	\$2,803,382
El Camino Fundamental High	0	0	1197	0	\$10,485,062	\$6,990,041	\$17,475,103
Mira Loma High	0	0	835	0	\$7,314,141	\$4,876,094	\$12,190,235
Rio Americano High	0	0	55	0	\$536,649	\$357,766	\$894,415
San Juan High	0	0	605	0	\$5,299,467	\$3,532,978	\$8,832,445
<b>TOTALS</b>	<b>3478</b>	<b>2282</b>	<b>3152</b>	<b>0</b>	<b>\$65,656,657</b>	<b>\$43,771,106</b>	<b>\$109,427,763</b>

The District prepared a Facility Master Plan in 2014 that identified \$554,508,067 in “Facility Condition Improvement Projects” plus an additional \$837,574,311 in “Master Plan Improvement Projects”. The grand total facility needs identified were in excess of \$2.4 billion. The identified facility needs exceed the eligibility for modernization projects in the State Building Program.

**Table 10**

**New Development Share of Modernization Costs**

<u>Grade</u>	<u>Eligible Modernization</u>	<u>New Development Impacts</u>		
	<u>Grants</u>	<u>Students</u>	<u>\$/Student</u>	<u>Amount</u>
<b>TK-6</b>	3,478	138	\$32,106	\$4,430,628
<b>7-8</b>	2,282	41	\$34,038	\$1,395,558
<b>9-12</b>	3,152	84	\$43,184	\$3,627,456
<b>Totals</b>	<b>8,912</b>	<b>263</b>		<b>\$9,453,642</b>

**Includes students from new developments not housed in new facilities.  
 Amounts based on State OPSC allowances for new construction projects.**

This data is used to show that there are significant needs within the school District to invest in its existing facilities. Without modernizing its schools, the District could be forced to begin closing some of its buildings and schools.

To accurately account for the amount of the modernization projects attributed to the impact of new developments, only the students from new developments that were not already housed in new facilities are included in the net needs for modernization projects. As can be seen in the charts, the net modernization needs due to new development impacts are much less than the total District modernization needs.

Impact of New Residential Development

This next table compares the development-related enrollment to the available district capacity for each grade level and then multiplies the unhoused students by the new school construction costs to determine the total school facility costs related to the impact of new residential housing developments.

The modernization needs are included for the students not housed in new facilities but who would be housed in existing facilities that are eligible for and need to be modernized to provide adequate housing and to maintain the existing level of service for the students generated by development.

**Table 11**

**San Juan Unified  
 Summary of Residential Impact**

<u>School Facility</u>	<u>Students Generated</u>	<u>Available Space</u>	<u>Net Unhoused</u>	<u>Construction Cost Per Student</u>	<u>Total Facility Costs</u>
Elementary	138	926	0	\$32,106	\$0
Middle	41	232	0	\$34,038	\$0
High & Cont.	84	587	0	\$43,184	\$0
Site Purchase: 0.0 acres					\$0
Site Development:					\$0
<b>New Construction needs due to development:</b>					<b>\$0</b>
<b>Modernization needs due to development:</b>					<b>\$9,453,642</b>
<b>TOTAL DEVELOPMENT IMPACT:</b>					<b>\$9,453,642</b>
<b>Average cost per student:</b>					<b>\$35,945</b>
<b>Total Residential Sq Ft:</b>					<b>1,781,325</b>
<b>Residential Fee Justified:</b>					<b>\$5.31</b>

The total need for school facilities based solely on the impact of the 945 new housing units projected over the next five years totals \$9,453,642. To determine the impact per square foot of residential development, this amount is divided by the total square feet of the projected developments. As calculated from the historic Developer Fee Permits, the average size home built has averaged 1,885 square feet. The total area for 945 new homes would therefore be 1,781,325 square feet. The total residential fee needed to be able to collect \$9,453,642 would be **\$5.31** per square foot.

Impact of Other Residential Development

In addition to new residential development projects that typically include new single family homes and new multi-family units, the District can also be impacted by additional types of new development projects. These include but are not limited to redevelopment projects, additions to existing housing units, and replacement of existing housing units with new housing units.

These development projects are still residential projects and therefore it is reasonable to assume they would have the same monetary impacts per square foot as the new residential development projects. However, the net impact is reduced due to the fact that there was a previous residential building in its place. Therefore, the development impact fees should only be charged for other residential developments if the new building(s) exceed the square footage area of the previous building(s). If the new building is larger than the existing building, then it is reasonable to assume that additional students could be generated by the project. The project would only pay for the development impact fees for the net increase in assessable space generated by the development project. Education Code allows for an exemption from development impacts fees for any additions to existing residential structures that are 500 square feet or less.

Pursuant to the above, in situations where there is no increase in square footage of the replacement development, if student yield rates of the replacement development are equal to or less than the student yield rates of the preexisting development, then there are no additional students and therefore no fee may be charged on the replacement development. In contrast, if one or more of the student yield rates of the replacement development is greater than the student yield rates of the preexisting development, then there are additional students and cost impacts, and therefore a fee may be charged on the replacement development.

#### Impact of Commercial/Industrial Development

There is a correlation between the growth of commercial/industrial firms/facilities within a community and the generation of school students within most business service areas. Fees for commercial/industrial can only be imposed if the residential fees will not fully mitigate the cost of providing school facilities to students from new development.

The approach utilized in this section is to apply statutory standards, U.S. Census employment statistics, and local statistics to determine the impact of future commercial/industrial development projects on the District. Many of the factors used in this analysis were taken from the U.S. Census, which remains the most complete and authoritative source of information on the community in addition to the “1990 SanDAG Traffic Generators Report”.

#### Employees per Square Foot of Commercial Development

Results from a survey published by the San Diego Association of Governments “1990 San DAG Traffic Generators” are used to establish numbers of employees per square foot of building area to be



anticipated in new commercial or industrial development projects. The average number of workers per 1,000 square feet of area ranges from 0.06 for Rental Self Storage to 4.79 for Standard Commercial Offices. The generation factors from that report are shown in the following table.

**Table 12**

Commercial/Industrial Category	Average Square Foot Per Employee	Employees Per Average Square Foot
Banks	354	0.00283
Community Shopping Centers	652	0.00153
Neighborhood Shopping Centers	369	0.00271
Industrial Business Parks	284	0.00352
Industrial Parks	742	0.00135
Rental Self Storage	15541	0.00006
Scientific Research & Development	329	0.00304
Lodging	882	0.00113
Standard Commercial Office	209	0.00479
Large High Rise Commercial Office	232	0.00431
Corporate Offices	372	0.00269
Medical Offices	234	0.00427

Source: 1990 SanDAG Traffic Generators report

Students per Employee

The number of students per employee is determined by using the S0802: Means of Transportation to Work by Selected Characteristics 2018-2022 American Community Survey 5-Year Estimates and DP1: Profile of General Population and Housing Characteristics 2020: DEC Demographic Profile for the District. There were 162,451 employees and 141,593 homes in the District. This represents a ratio of 1.1473 employees per home.

There were 39,445 school age children attending the District in 2020. This is a ratio of 0.2428 students per employee. This ratio, however, must be reduced by including only the percentage of employees that worked in their community of residence (35.5%), because only those employees living in the District will impact the District’s school facilities with their children. The net ratio of students per employee in the District is 0.0862.

School Facilities Cost per Student

Facility costs for housing commercially generated students are the same as those used for residential construction. The cost factors used to assess the impact from commercial development projects are contained in Table 11.

Residential Offset

When additional employees are generated in the District as a result of new or replacement commercial/industrial development, fees will also be charged on the residential units necessary to provide housing for the employees living in the District. To prevent a commercial or industrial development from paying for the portion of the impact that will be covered by the residential fee, this amount has been calculated and deducted from each category. The residential offset amount is calculated by multiplying the following factors together and dividing by 1,000 (to convert from cost per 1,000 square feet to cost per square foot).

- Employees per 1,000 square feet (varies from a low of 0.06 for rental self storage to a high of 4.79 for office building).
- Percentage of employees that worked in their community of residence (35.5 percent).
- Housing units per employee (0.8716). This was derived from the 2018-2022 ACS 5 Year Estimates and DP1 data for the District, which indicates there were 141,593 housing units and 162,451 employees.
- Percentage of employees that will occupy new housing units (75 percent).
- Average square feet per dwelling unit (1,885).
- Residential fee charged by the District (\$5.17 per square foot).
- Average cost per student was determined in Table 11.

The following table shows the calculation of the school facility costs generated by a square foot of new commercial/industrial development for each category of development.

**Table 13**

<b>San Juan Unified Summary of Commercial and Industrial Uses</b>							
<u>Type</u>	<u>Employees per 1,000 Sq. Ft.</u>	<u>Students per Employee</u>	<u>Students per 1,000 Sq. Ft.</u>	<u>Average Cost per Student</u>	<u>Cost per Sq. Ft.</u>	<u>Residential offset per Sq. Ft.</u>	<u>Net Cost per Sq. Ft.</u>
Banks	2.83	0.0862	0.244	\$35,945	\$8.77	\$6.40	\$2.37
Community Shopping Centers	1.53	0.0862	0.132	\$35,945	\$4.74	\$3.46	\$1.28
Neighborhood Shopping Centers	2.71	0.0862	0.234	\$35,945	\$8.40	\$6.13	\$2.27
Industrial Business Parks	3.52	0.0862	0.303	\$35,945	\$10.91	\$7.96	\$2.95
Industrial Parks	1.35	0.0862	0.116	\$35,945	\$4.18	\$3.05	\$1.13
Rental Self Storage	0.06	0.0862	0.005	\$35,945	\$0.19	\$0.14	\$0.05
Scientific Research & Development	3.04	0.0862	0.262	\$35,945	\$9.42	\$6.88	\$2.54
Lodging	1.13	0.0862	0.097	\$35,945	\$3.50	\$2.56	\$0.94
Standard Commercial Office	4.79	0.0862	0.413	\$35,945	\$14.84	\$10.83	\$4.01
Large High Rise Commercial Office	4.31	0.0862	0.372	\$35,945	\$13.35	\$9.75	\$3.60
Corporate Offices	2.69	0.0862	0.232	\$35,945	\$8.33	\$6.08	\$2.25
Medical Offices	4.27	0.0862	0.368	\$35,945	\$13.23	\$9.66	\$3.57

\*Based on 1990 SanDAG Traffic Generator Report

### Net Cost per Square Foot

Since the State Maximum Fee is now \$0.84 for commercial/industrial construction, the District is justified in collecting the maximum fee for all categories with the exception of Rental Self Storage. The District can only justify collection of \$0.05 per square foot of Rental Self Storage construction.

### Impact of Replacement/Reconstruction Projects

This section provides clarification for the process of charging fees for projects that consist of replacement of existing structures with new buildings.

**Residential to Residential:** When a residential building is replaced with a residential building, the regulations state that the school impact fees will only be charged for the net increase in area if the net increase is greater than 500 square feet.

**Commercial to Commercial:** When a commercial building is replaced with a commercial building, the impact fees charged will be for the net increase in building area and when such increase is linked to an increase in students generated by the replacement development compared to the preexisting development. Fees may also be charged when there is no net increase in building area but there is an increase in the students to be generated by the replacement development when compared to the preexisting development. In order for the new building to get credit for the area of the existing building to be demolished, it needs to be in existence when the building permit for the replacement building is issued.

Table 13 illustrates the students generated per 1,000 square feet by the various types of commercial developments. When one type of development is being replaced by a type that generates more students, then there is an increase in students generated that results in the justification of development fees for the projects impact on schools. By comparing the net cost impacts between the two types of construction as shown in the table, then the difference between the two rates is the net increase in impact. That amount would be the fee that would be charged for commercial replacement projects with a not to exceed amount of \$0.84 which is the current maximum commercial rate.

**Commercial to Residential:** When a commercial building is replaced with residential construction, the school impact fees should be an amount equal to the difference between the current residential and current commercial rates for up to the total area of the existing commercial building(s). Any construction area that exceeds the area of the existing buildings will be subject to the standard

residential fees. This process gives a credit for the school impacts of the commercial buildings. The net school impact fees paid will address the increased impact of residential construction as compared to commercial construction. The net charge for conversion of commercial space to residential space is  $\$5.17$  (residential) -  $\$0.84$  (commercial) =  $\$4.33$  per square foot. This same impact fee process is charged when senior housing complexes (which are charged commercial rates) are converted to standard residential units.

**Residential to Commercial:** When a residential building is replaced with a commercial building, no impact fees may be charged unless the students generated by the replacement development is shown to be greater than the preexisting development. In order for the new building to get credit for the area of the existing building to be demolished, it needs to be in existence when the building permit for the replacement building is issued

Each of these specific situations result in the collection of development impact fees in order to address the net increase in impacts on school district facilities as a result of the development project. The methodology the District would use to justify the imposition of fees on replacement developments is illustrated in Appendix F to this Study. Where replacement projects do not fall into any of the categories identified in this Study, those projects will be evaluated on a case-by-case basis.

#### Verifying the Sufficiency of the Development Impact

Education Code Section 17620 requires districts to find that fee revenues will not exceed the cost of providing school facilities to the students generated by the development paying the fees. This section shows that the fee revenues do not exceed the impact of the new development.

The total need for school facilities resulting from new development totals  $\$9,453,642$ . The amount the District would collect over the five year period at the maximum rate of  $\$5.17$  for residential and  $\$0.84$  for commercial/industrial development would be as follows:

$\$5.17 \times 945 \text{ homes} \times 1,885 \text{ sq ft per home} = \$9,209,450$  for Residential

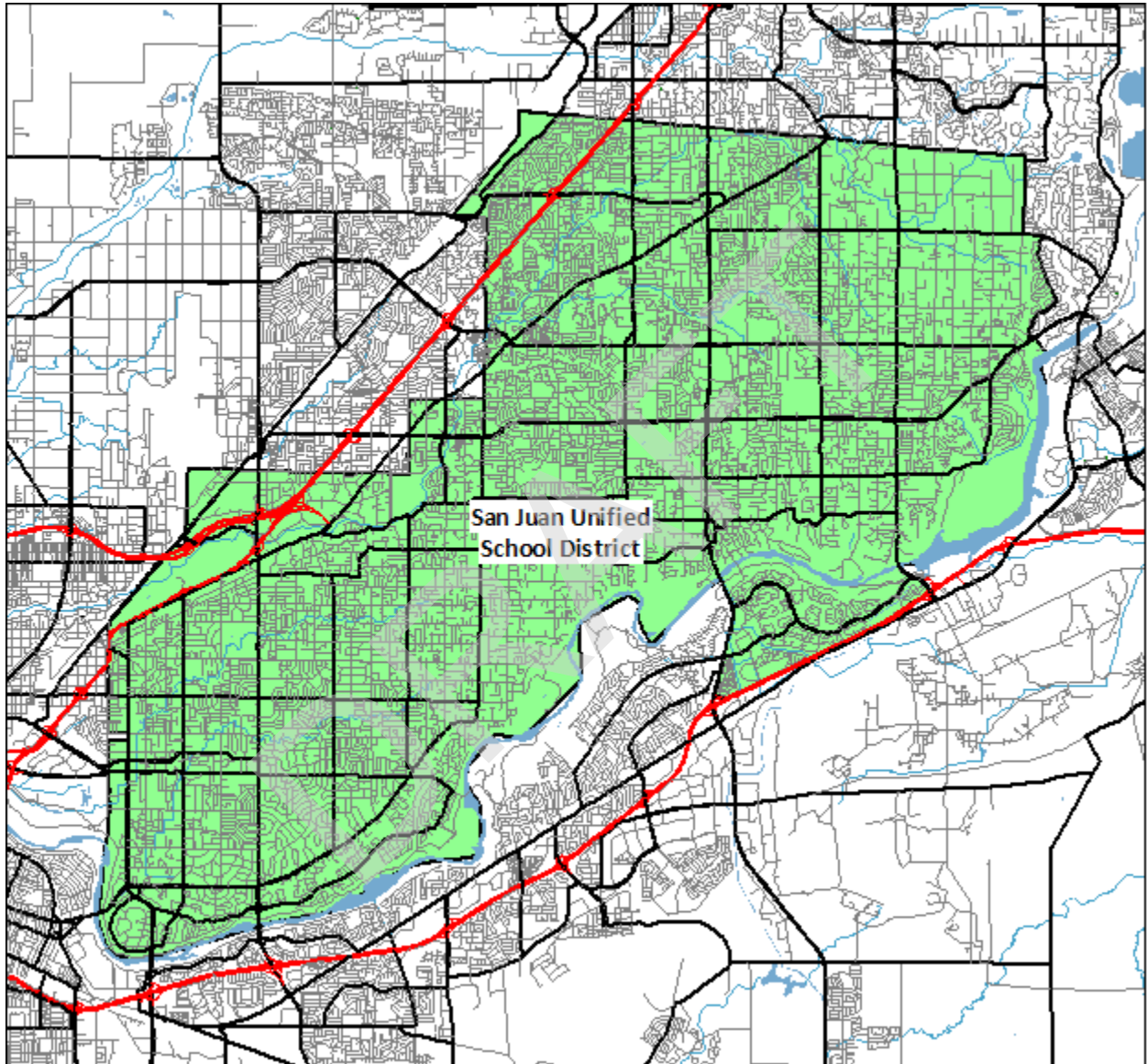
$\$0.84 \times 50,000 \text{ sq ft per year} \times 5 \text{ years} = \$210,000$  for Commercial/Industrial

Total projected 5 year income:  $\$9,419,450$

The estimated income is less than the projected facility needs due to the impact of new development projects.

### District Map

The following map shows the extent of the areas for which development fees are applicable to the San Juan Unified School District.



## Conclusion

Based on the data contained in this Study, it is found that a reasonable relationship exists between residential, commercial/industrial development and the need for school facilities in the San Juan Unified School District. The following three nexus tests required to show justification for levying fees have been met:

Burden Nexus: New and replacement residential development will generate an average of 0.2786 TK-12 grade students per unit. Because the District does not have adequate facilities for all the students generated by new developments, the District will need to build additional facilities and/or modernize/reconstruct the existing facilities in order to maintain the existing level of services in which the new students will be housed.

Cost Nexus: The cost to provide new and reconstructed facilities is an average of \$5.31 per square foot of residential development. Each square foot of residential development will generate \$5.17 in developer fees resulting in a shortfall of \$0.14 per square foot.

Benefit Nexus: The developer fees to be collected by the San Juan Unified School District will be used for the provision of new and reconstructed or modernized school facilities. This will benefit the students to be generated by new and replacement development by providing them with adequate educational school facilities.

The District's planned use of the fees received from development impacts will include the following types of projects, each of which will benefit students from new developments.

- 1) **New Schools:** When there is enough development activity occurring in a single area, the District will build a new school to house the students from new developments.
- 2) **Additions to Existing Schools:** When infill development occurs, the District will accommodate students at existing schools by building needed classrooms and/or support facilities such as cafeterias, restrooms, gyms and libraries as needed to increase the school capacity. Schools may also need upgrades of the technology and tele-communication systems to be able to increase their capacity.

- 3) Portable Replacement Projects: Some of the District's capacity is in portables and therefore may not be included in the State's capacity calculations. These portables can be replaced with new permanent or modular classrooms to provide adequate space for students from new developments. These projects result in an increase to the facility capacity according to State standards. In addition, old portables that have reached the end of their life expectancy, will need to be replaced to maintain the existing level of service. These types of projects are considered modernization projects in the State Building Program. If development impacts did not exist, the old portables could be removed.
  
- 4) Modernization/Upgrade Projects: In many cases, students from new developments are not located in areas where new schools are planned to be built. The District plans to modernize or upgrade older schools to be equivalent to new schools so students will be housed in equitable facilities to those students housed in new schools. These projects may include updates to the building structures to meet current building standards, along with upgrades to the current fire and safety standards and any access compliance standards.

The District plans to use the developer fees on the projects in their Facility Master Plan that in 2014 identified \$554,508,067 in "Facility Condition Improvement Projects" plus an additional \$837,574,311 in "Master Plan Improvement Projects". The grand total facility needs identified were in excess of \$2.4 billion.

The reasonable relationship identified by these findings provides the required justification for the San Juan Unified School District to levy the maximum fees of **\$5.17** per square foot for residential construction and **\$0.84** per square foot for commercial/industrial construction, except for Rental Self Storage facilities in which a fee of **\$0.05** per square foot is justified as authorized by Education Code Section 17620.

# Appendices

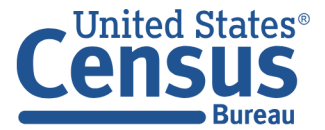
2024 Developer Fee Justification Study

San Juan Unified School District

DRAFT



# PROFILE OF GENERAL POPULATION AND HOUSING CHARACTERISTICS



Note: This is a modified view of the original table produced by the U.S. Census Bureau. This download or printed version may have missing information from the original table.

San Juan Unified School District, California		
Label	Count	Percent
> SEX AND AGE		
> MEDIAN AGE BY SEX		
> RACE		
> TOTAL RACES TALLIED [1]		
> HISPANIC OR LATINO		
> HISPANIC OR LATINO BY RACE		
> RELATIONSHIP		
> HOUSEHOLDS BY TYPE		
✓ HOUSING OCCUPANCY		
✓ Total housing units	147,528	100.0%
Occupied housing units	141,593	96.0%
✓ Vacant housing units	5,935	4.0%
For rent	2,808	1.9%
Rented, not occupied	179	0.1%
For sale only	818	0.6%
Sold, not occupied	297	0.2%
For seasonal, recreational, or	410	0.3%
All other vacants	1,423	1.0%
✓ VACANCY RATES		
Homeowner vacancy rate (percent)	1.0	(X)
Rental vacancy rate (percent) [5]	4.3	(X)
✓ HOUSING TENURE		
✓ Occupied housing units	141,593	100.0%
Owner-occupied housing units	79,132	55.9%
Renter-occupied housing units	62,461	44.1%

# Table Notes

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## PROFILE OF GENERAL POPULATION AND HOUSING CHARACTERISTICS

**Survey/Program:** Decennial Census

**Year:** 2020

**Table ID:** DP1

Note: For information on data collection, confidentiality protection, nonsampling error, subject definitions, and guidance on using the data, visit the 2020 Census Demographic and Housing Characteristics File (DHC) Technical Documentation webpage.

To protect respondent confidentiality, data have undergone disclosure avoidance methods which add "statistical noise" - small, random additions or subtractions - to the data so that no one can reliably link the published data to a specific person or household. The Census Bureau encourages data users to aggregate small populations and geographies to improve accuracy and diminish implausible results.

An "(X)" means not applicable.

An "-" means the statistic could not be computed because there were an insufficient number of observations.

[1] The alone or in combination categories are tallies of responses rather than respondents. That is, the alone or in combination categories are not mutually exclusive. Individuals who reported two races were counted in two separate and distinct alone or in combination race categories, while those who reported three races were counted in three categories, and so on. For example, a respondent who indicated "White **and** Black or African American" was counted in the White alone or in combination category as well as in the Black or African American alone or in combination category. Consequently, the sum of all alone or in combination categories equals the number of races reported (i.e., responses), which exceeds the total population.

[2] "Child" includes biological, adopted, and stepchildren of the householder.

[3] "Own children" includes biological, adopted, and stepchildren of the householder.

[4] The homeowner vacancy rate is the proportion of the homeowner inventory that is vacant "for sale." It is computed by dividing the total number of vacant units "for sale only" by the sum of owner-occupied units, vacant units that are "for sale only," and vacant units that have been sold but not yet occupied; and then multiplying by 100.

[5] The rental vacancy rate is the proportion of the rental inventory that is vacant "for rent." It is computed by dividing the total number of vacant unit "for rent" by the sum of the renter-occupied units, vacant units that are "for rent," and vacant units that have been rented but not yet occupied; and then multiplying by 100.

Source: U.S. Census Bureau, 2020 Census Demographic Profile

## Selected Housing Characteristics

Note: This is a modified view of the original table produced by the U.S. Census Bureau. This download or printed version may have missing information from the original table.

		San Juan Unified School District, California		
Label	Estimate	Margin of Error	Percent	Percent Margin of Error
▼ HOUSING OCCUPANCY				
▼ Total housing units	145,936	±1,509	145,936	(
Occupied housing units	139,201	±1,577	95.4%	±C
Vacant housing units	6,735	±707	4.6%	±C
Homeowner vacancy rate	1.0	±0.4	(X)	(
Rental vacancy rate	4.4	±0.8	(X)	(
▼ UNITS IN STRUCTURE				
▼ Total housing units	145,936	±1,509	145,936	(
1-unit, detached	84,100	±1,351	57.6%	±C
1-unit, attached	12,152	±972	8.3%	±C
2 units	3,040	±468	2.1%	±C
3 or 4 units	9,093	±845	6.2%	±C
5 to 9 units	10,633	±899	7.3%	±C
10 to 19 units	5,608	±575	3.8%	±C
20 or more units	18,101	±869	12.4%	±C
Mobile home	3,052	±391	2.1%	±C
Boat, RV, van, etc.	157	±70	0.1%	±C
▼ YEAR STRUCTURE BUILT				
▼ Total housing units	145,936	±1,509	145,936	(

# Table Notes

## Selected Housing Characteristics

**Survey/Program:** American Community Survey

**Year:** 2022

**Estimates:** 5-Year

**Table ID:** DP04

Although the American Community Survey (ACS) produces population, demographic and housing unit estimates, the decennial census is the official source of population totals for April 1st of each decennial year. In between censuses, the Census Bureau's Population Estimates Program produces and disseminates the official estimates of the population for the nation, states, counties, cities, and towns and estimates of housing units for states and counties.

Information about the American Community Survey (ACS) can be found on the ACS website. Supporting documentation including code lists, subject definitions, data accuracy, and statistical testing, and a full list of ACS tables and table shells (without estimates) can be found on the Technical Documentation section of the ACS website.

Sample size and data quality measures (including coverage rates, allocation rates, and response rates) can be found on the American Community Survey website in the

[Methodology](#) section.

Source: U.S. Census Bureau, 2018-2022 American Community Survey 5-Year Estimates

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 ACS Technical Documentation). The effect of nonsampling error is not represented in these tables.

Households not paying cash rent are excluded from the calculation of median gross rent.

Telephone service data are not available for certain geographic areas due to problems with data collection of this question that occurred in 2019. Both ACS 1-year and ACS 5-year files were affected and may take several years in the ACS 5-year files until the estimates are available for the geographic areas affected.

The 2018-2022 American Community Survey (ACS) data generally reflect the March 2020 Office of Management and Budget (OMB) delineations of metropolitan and micropolitan statistical areas. In certain instances, the names, codes, and boundaries of the principal cities shown in ACS tables may differ from the OMB delineation lists due to differences in the effective dates of the geographic entities.

Estimates of urban and rural populations, housing units, and characteristics reflect boundaries of urban areas defined based on 2020 Census data. As a result, data for urban and rural areas from the ACS do not necessarily reflect the results of ongoing urbanization.

Explanation of Symbols:

-

The estimate could not be computed because there were an insufficient number of sample observations. For a ratio of medians estimate, one or both of the median estimates falls in the lowest interval or highest interval of an open-ended distribution. For a 5-year median estimate, the margin of error associated with a median was larger than the median itself.

N

The estimate or margin of error cannot be displayed because there were an insufficient number of sample cases in the selected geographic area.

(X)

The estimate or margin of error is not applicable or not available.

median-

The median falls in the lowest interval of an open-ended distribution (for example "2,500-")

median+

The median falls in the highest interval of an open-ended distribution (for example "250,000+").

\*\*

The margin of error could not be computed because there were an insufficient number of sample observations.

\*\*\*

The margin of error could not be computed because the median falls in the lowest interval or highest interval of an open-ended distribution.

\*\*\*\*\*

A margin of error is not appropriate because the corresponding estimate is controlled to an independent population or housing estimate. Effectively, the corresponding estimate has no sampling error and the margin of error may be treated as zero.

# Means of Transportation to Work by Selected Characteristics

Note: This is a modified view of the original table produced by the U.S. Census Bureau. This download or printed version may have missing information from the original table.

		San Juan Unified School District, California	
		Total	Car, truck or van
Label	Estimate	Margin of Error	
> Workers 16 years and over	162,451	±3,107	
> EARNINGS IN THE PAST 12 MONTHS (IN 2022 INFLATION-ADJUSTED DOLLARS) FOR WORKERS			
> POVERTY STATUS IN THE PAST 12 MONTHS			
> Workers 16 years and over	162,451	±3,107	
> Workers 16 years and over who did not work from home	137,318	±2,883	
> TIME OF DEPARTURE TO GO TO WORK			
> TRAVEL TIME TO WORK			
Less than 10 minutes	8.7%	±0.6	
10 to 14 minutes	10.7%	±0.7	
15 to 19 minutes	16.1%	±0.9	
20 to 24 minutes	18.7%	±0.9	
25 to 29 minutes	8.3%	±0.6	
30 to 34 minutes	17.9%	±0.8	
35 to 44 minutes	6.9%	±0.5	
45 to 59 minutes	5.9%	±0.5	
60 or more minutes	7.0%	±0.6	
Mean travel time to work (minutes)	27.0	±0.6	
> Workers 16 years and over in households	162,112	±3,078	

# Table Notes

## Means of Transportation to Work by Selected Characteristics

**Survey/Program:** American Community Survey

**Year:** 2022

**Estimates:** 5-Year

**Table ID:** S0802

Although the American Community Survey (ACS) produces population, demographic and housing unit estimates, the decennial census is the official source of population totals for April 1st of each decennial year. In between censuses, the Census Bureau's Population Estimates Program produces and disseminates the official estimates of the population for the nation, states, counties, cities, and towns and estimates of housing units for states and counties.

Information about the American Community Survey (ACS) can be found on the ACS website. Supporting documentation including code lists, subject definitions, data accuracy, and statistical testing, and a full list of ACS tables and table shells (without estimates) can be found on the Technical Documentation section of the ACS website.

Sample size and data quality measures (including coverage rates, allocation rates, and response rates) can be found on the American Community Survey website in the [Methodology](#) section.

Source: U.S. Census Bureau, 2018-2022 American Community Survey 5-Year Estimates

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 ACS Technical Documentation). The effect of nonsampling error is not represented in these tables.

Foreign born excludes people born outside the United States to a parent who is a U.S. citizen.

Workers include members of the Armed Forces and civilians who were at work last week.

Industry titles and their 4-digit codes are based on the 2017 North American Industry Classification System. The industry categories adhere to the guidelines issued in Clarification Memorandum No. "NAICS Alternate Aggregation Structure for Use By U.S. Statistical Agencies," issued by the Office of Management and Budget.

Occupation titles and their 4-digit codes are based on the 2018 Standard Occupational Classification.

When information is missing or inconsistent, the Census Bureau logically assigns an acceptable value using the response to a related question or questions. If a logical assignment is not possible, data are filled using a statistical process called allocation, which uses a similar individual or household to provide a donor value. The "Allocated" section is the number of respondents who received an allocated value for a particular subject.

Several means of transportation to work categories were updated in 2019. For more information, see: Change to Means of Transportation.

In 2019, methodological changes were made to the class of worker question. These changes involved modifications to the question wording, the category wording, and the visual format of the categories on the questionnaire. The format for the class of worker categories are now listed under the headings "Private Sector Employee," "Government Employee," and "Self-Employed or Other." Additionally, the category of Active Duty was added as one of the response categories under the "Government Employee" section for the mail questionnaire. For more detailed information about the

2019 changes, see the 2016 American Community Survey Content Test Report for Class of Worker located at [http://www.census.gov/library/working-papers/2017/acs/2017\\_Martinez\\_01.html](http://www.census.gov/library/working-papers/2017/acs/2017_Martinez_01.html).

The 2018-2022 American Community Survey (ACS) data generally reflect the March 2020 Office of Management and Budget (OMB) delineations of metropolitan and micropolitan statistical areas. In certain instances, the names, codes, and boundaries of the principal cities shown in ACS tables may differ from the OMB delineation lists due to differences in the effective dates of the geographic entities.

Estimates of urban and rural populations, housing units, and characteristics reflect boundaries of urban areas defined based on 2020 Census data. As a result, data for urban and rural areas from the ACS do not necessarily reflect the results of ongoing urbanization.

Explanation of Symbols:

- The estimate could not be computed because there were an insufficient number of sample observations. For a ratio of medians estimate, one or both of the median estimates falls in the lowest interval or highest interval of an open-ended distribution. For a 5-year median estimate, the margin of error associated with a median was larger than the median itself.

N

The estimate or margin of error cannot be displayed because there were an insufficient number of sample cases in the selected geographic area.

(X)

The estimate or margin of error is not applicable or not available.

median-

The median falls in the lowest interval of an open-ended distribution (for example "2,500-")

median+

The median falls in the highest interval of an open-ended distribution (for example "250,000+").

\*\*

The margin of error could not be computed because there were an insufficient number of sample observations.

\*\*\*

The margin of error could not be computed because the median falls in the lowest interval or highest interval of an open-ended distribution.

\*\*\*\*\*

A margin of error is not appropriate because the corresponding estimate is controlled to an independent population or housing estimate. Effectively, the corresponding estimate has no sampling error and the margin of error may be treated as zero.



## Use of Developer Fees:

A School District can use the revenue collected on residential and commercial/industrial construction for the purposes listed below:

- Purchase or lease of interim school facilities to house students generated by new development pending the construction of permanent facilities.
- Purchase or lease of land for school facilities for such students.
- Acquisition of school facilities for such students, including:
  - Construction
  - Modernization/reconstruction
  - Architectural and engineering costs
  - Permits and plan checking
  - Testing and inspection
  - Furniture, Equipment and Technology for use in school facilities
- Legal and other administrative costs related to the provision of such new facilities
- Administration of the collection of, and justification for, such fees, and
- Any other purpose arising from the process of providing facilities for students generated by new development.

Following is an excerpt from the Education Code that states the valid uses of the Level 1 developer fees. It refers to construction and reconstruction. The term reconstruction was originally used in the Leroy Greene program. The term modernization is currently used in the 1998 State Building Program and represents the same scope of work used in the original reconstruction projects.

**Ed Code Section 17620.** (a) (1) The governing board of any school district is authorized to levy a fee, charge, dedication, or other requirement against any construction within the boundaries of the district, for the purpose of funding the construction or reconstruction of school facilities, subject to any limitations set forth in Chapter 4.9 (commencing with Section 65995) of Division 1 of Title 7 of the Government Code. This fee, charge, dedication, or other requirement may be applied to construction only as follows: ...

The limitations referred to in this text describe the maximum amounts that can be charged for residential and commercial/industrial projects and any projects that qualify for exemptions. They do not limit the use of the funds received.



**Determination of Average State allowed amounts for Site Development Costs**

**Elementary Schools**

<u>District</u>	<u>Project #</u>	<u>Acres</u>	Original		2009 Adjusted		2009	
			<u>OPSC Site Development</u>	<u>Inflation Factor</u>	<u>Site Development</u>	<u>Project Year</u>		
Davis Jt Unified	3	9.05	\$532,282	38.4%	\$1,473,469	2004	\$162,814	
Dry Creek Jt Elem	2	8.5	\$516,347	46.2%	\$1,509,322	2002	\$177,567	
Dry Creek Jt Elem	5	11.06	\$993,868	20.1%	\$2,387,568	2006	\$215,874	
Elk Grove Unified	5	12.17	\$556,011	48.2%	\$1,648,316	2001	\$135,441	
Elk Grove Unified	10	11	\$690,120	48.2%	\$2,045,888	2001	\$185,990	
Elk Grove Unified	11	10	\$702,127	48.2%	\$2,081,483	2001	\$208,148	
Elk Grove Unified	14	10	\$732,837	46.2%	\$2,142,139	2002	\$214,214	
Elk Grove Unified	16	9.86	\$570,198	46.2%	\$1,666,733	2002	\$169,040	
Elk Grove Unified	17	10	\$542,662	46.2%	\$1,586,243	2002	\$158,624	
Elk Grove Unified	20	10	\$710,730	43.2%	\$2,034,830	2003	\$203,483	
Elk Grove Unified	25	10	\$645,923	38.4%	\$1,788,052	2004	\$178,805	
Elk Grove Unified	28	10.03	\$856,468	24.4%	\$2,130,974	2005	\$212,460	
Elk Grove Unified	39	9.91	\$1,007,695	20.1%	\$2,420,785	2006	\$244,277	
Folsom-Cordova Unified	1	9.79	\$816,196	20.1%	\$1,960,747	2006	\$200,281	
Folsom-Cordova Unified	4	7.5	\$455,908	46.2%	\$1,332,654	2002	\$177,687	
Folsom-Cordova Unified	5	8	\$544,213	46.2%	\$1,590,776	2002	\$198,847	
Folsom-Cordova Unified	8	8.97	\$928,197	11.2%	\$2,063,757	2007	\$230,073	
Galt Jt Union Elem	2	10.1	\$1,033,044	38.4%	\$2,859,685	2004	\$283,137	
Lincoln Unified	1	9.39	\$433,498	46.2%	\$1,267,148	2002	\$134,947	
Lodi Unified	3	11.2	\$555,999	46.2%	\$1,625,228	2002	\$145,110	
Lodi Unified	10	11.42	\$1,245,492	46.2%	\$3,640,669	2002	\$318,798	
Lodi Unified	19	9.93	\$999,164	11.2%	\$2,221,545	2007	\$223,721	
Lodi Unified	22	10	\$1,416,212	7.7%	\$3,051,426	2008	\$305,143	
Natomas Unified	6	8.53	\$685,284	46.2%	\$2,003,138	2002	\$234,834	
Natomas Unified	10	9.83	\$618,251	43.2%	\$1,770,061	2003	\$180,067	
Natomas Unified	12	9.61	\$735,211	24.4%	\$1,829,275	2005	\$190,351	
Rocklin Unified	8	10.91	\$593,056	46.2%	\$1,733,548	2002	\$158,895	
Stockton Unified	1	12.66	\$1,462,232	7.7%	\$3,150,582	2008	\$248,861	
Stockton Unified	2	10.5	\$781,675	43.2%	\$2,237,946	2003	\$213,138	
Stockton Unified	6	12.48	\$1,136,704	20.1%	\$2,730,703	2006	\$218,806	
Tracy Jt Unified	4	10	\$618,254	46.2%	\$1,807,204	2002	\$180,720	
Tracy Jt Unified	10	10	\$573,006	38.4%	\$1,586,202	2004	\$158,620	
Washington Unified	1	8	\$446,161	46.2%	\$1,304,163	2002	\$163,020	
Washington Unified	4	10.76	\$979,085	7.7%	\$2,109,575	2008	\$196,057	
<b>Totals</b>		<b>341.16</b>			<b>\$68,791,833</b>	<b>Average</b>	<b>\$201,641</b>	<b>2024 Adjusted Value \$339,346</b>

**Middle and High Schools**

<u>District</u>	<u>Project #</u>	<u>Acres</u>	Original		2009 Adjusted		2009	
			<u>OPSC Site Development</u>	<u>Inflation Factor</u>	<u>Site Development</u>	<u>Project Year</u>		
Western Placer Unified	4	19.3	\$5,973,312	24.4%	\$7,431,085	2005	\$385,030	
Roseville City Elem	2	21.6	\$1,780,588	48.2%	\$2,639,311	2000	\$122,190	
Elk Grove Unified	4	66.2	\$8,659,494	48.2%	\$12,835,704	2000	\$193,893	
Elk Grove Unified	13	76.4	\$9,791,732	48.2%	\$14,513,986	2001	\$189,974	
Elk Grove Unified	18	84.3	\$13,274,562	43.2%	\$19,002,626	2003	\$225,417	
Grant Jt Union High	2	24	\$2,183,840	48.2%	\$3,237,039	2000	\$134,877	
Center Unified	1	21.2	\$1,944,310	46.2%	\$2,841,684	2002	\$134,042	
Lodi Unified	2	13.4	\$1,076,844	46.2%	\$1,573,849	2002	\$117,451	
Lodi Unified	6	13.4	\$2,002,164	46.2%	\$2,926,240	2002	\$218,376	
Galt Jt Union Elem	1	24.9	\$2,711,360	46.2%	\$3,962,757	2002	\$159,147	
Tahoe Truckee Unified	2	24	\$2,752,632	43.2%	\$3,940,412	2003	\$164,184	
Davis Unified	5	23.3	\$3,814,302	43.2%	\$5,460,199	2003	\$234,343	
Woodland Unified	3	50.2	\$8,664,700	46.2%	\$12,663,792	2002	\$252,267	
Sacramento City Unified	1	35.2	\$4,813,386	46.2%	\$7,034,949	2002	\$199,856	
Lodi Unified	4	47	\$7,652,176	46.2%	\$11,183,950	2002	\$237,956	
Stockton Unified	3	49.1	\$8,959,088	43.2%	\$12,824,996	2003	\$261,202	
Natomas Unified	11	38.7	\$3,017,002	38.4%	\$4,175,850	2004	\$107,903	
Rocklin Unified	11	47.1	\$11,101,088	24.4%	\$13,810,282	2005	\$293,212	
<b>Totals</b>		<b>679.3</b>			<b>\$142,058,711</b>	<b>Average</b>	<b>\$209,125</b>	<b>2024 Adjusted Value \$319,258</b>
<b>Middle Schools:</b>		<b>260.7</b>			<b>\$49,447,897</b>	<b>Middle</b>	<b>\$189,704</b>	<b>\$319,258</b>
<b>High Schools:</b>		<b>418.6</b>			<b>\$92,610,814</b>	<b>High</b>	<b>\$221,217</b>	<b>\$372,291</b>

## INDEX ADJUSTMENT ON THE ASSESSMENT FOR DEVELOPMENT

### PURPOSE OF REPORT

To report the index adjustment on the assessment for development, which may be levied pursuant to Education Code Section 17620.

### DESCRIPTION

The law requires the maximum assessment for development be adjusted every two years by the change in the Class B construction cost index, as determined by the State Allocation Board (Board) in each calendar year. This item requests that the Board make the adjustment based on the change reflected using the RS Means index.

### AUTHORITY

Education Code Section 17620(a)(1) states the following: “The governing board of any school district is authorized to levy a fee, charge, dedication, or other requirement against any construction within the boundaries of the district, for the purpose of funding the construction or reconstruction of school facilities, subject to any limitations set forth in Chapter 4.9 (commencing with Section 65995) of Division 1 of Title 7 of the Government Code.”

Government Code Section 65995(b)(3) states the following: “The amount of the limits set forth in paragraphs (1) and (2) shall be increased in 2000, and every two years thereafter, according to the adjustment for inflation set forth in the statewide cost index for class B construction, as determined by the State Allocation Board at its January meeting, which increase shall be effective as of the date of that meeting.”

### BACKGROUND

There are three levels that may be levied for developer’s fees. The fees are levied on a per-square foot basis. The lowest fee, Level I, is assessed if the district conducts a Justification Study that establishes the connection between the development coming into the district and the assessment of fees to pay for the cost of the facilities needed to house future students. The Level II fee is assessed if a district makes a timely application to the Board for new construction funding, conducts a School Facility Needs Analysis pursuant to Government Code Section 65995.6, and satisfies at least two of the requirements listed in Government Code Section 65995.5(b)(3). The Level III fee is assessed when State bond funds are exhausted; the district may impose a developer’s fee up to 100 percent of the School Facility Program new construction project cost.

**STAFF ANALYSIS/STATEMENTS**

A historical comparison of the assessment rates for development fees for 2020 and 2022 are shown below for information. According to the RS Means, the cost index for Class B construction increased by 7.84% percent, during the two-year period from January 2022 to January 2024, requiring the assessment for development fees to be adjusted as follows beginning January 2024:

**RS Means Index Maximum Level I Assessment Per Square Foot**

	<u>2020</u>	<u>2022</u>	<u>2024</u>
Residential	\$4.08	\$4.79	\$5.17
Commercial/Industrial	\$0.66	\$0.78	\$0.84

**RECOMMENDATION**

Increase the 2024 maximum Level I assessment for development in the amount of 7.84 percent using the RS Means Index to be effective immediately.

ATTACHMENT B

**ANNUAL ADJUSTMENT TO SCHOOL FACILITY PROGRAM GRANTS**

State Allocation Board Meeting, January 24, 2024

Grant Amount Adjustments

<b>New Construction</b>	<b>SFP Regulation Section</b>	<b>Adjusted Grant Per Pupil Effective 1-1-23</b>	<b>Adjusted Grant Per Pupil Effective 1-1-24</b>
Elementary	1859.71	\$15,983	\$15,770
Middle	1859.71	\$16,904	\$16,679
High	1859.71	\$21,509	\$21,223
Special Day Class – Severe	1859.71.1	\$44,911	\$44,314
Special Day Class – Non-Severe	1859.71.1	\$30,036	\$29,637
Automatic Fire Detection/Alarm System – Elementary	1859.71.2	\$19	\$19
Automatic Fire Detection/Alarm System – Middle	1859.71.2	\$25	\$25
Automatic Fire Detection/Alarm System – High	1859.71.2	\$43	\$42
Automatic Fire Detection/Alarm System – Special Day Class – Severe	1859.71.2	\$80	\$79
Automatic Fire Detection/Alarm System – Special Day Class – Non-Severe	1859.71.2	\$57	\$56
Automatic Sprinkler System – Elementary	1859.71.2	\$268	\$264
Automatic Sprinkler System – Middle	1859.71.2	\$319	\$315
Automatic Sprinkler System – High	1859.71.2	\$331	\$327
Automatic Sprinkler System – Special Day Class – Severe	1859.71.2	\$846	\$835
Automatic Sprinkler System – Special Day Class – Non-Severe	1859.71.2	\$567	\$559

ATTACHMENT B

**ANNUAL ADJUSTMENT TO SCHOOL FACILITY PROGRAM GRANTS**

State Allocation Board Meeting, January 24, 2024

Grant Amount Adjustments

<b>Modernization</b>	<b>SFP Regulation Section</b>	<b>Adjusted Grant Per Pupil Effective 1-1-23</b>	<b>Adjusted Grant Per Pupil Effective 1-1-24</b>
Elementary	1859.78	\$6,086	\$6,005
Middle	1859.78	\$6,436	\$6,350
High	1859.78	\$8,427	\$8,315
Special Day Class - Severe	1859.78.3	\$19,396	\$19,138
Special Day Class – Non-Severe	1859.78.3	\$12,977	\$12,804
State Special School – Severe	1859.78	\$32,330	\$31,900
Automatic Fire Detection/Alarm System – Elementary	1859.78.4	\$198	\$195
Automatic Fire Detection/Alarm System – Middle	1859.78.4	\$198	\$195
Automatic Fire Detection/Alarm System – High	1859.78.4	\$198	\$195
Automatic Fire Detection/Alarm System – Special Day Class – Severe	1859.78.4	\$544	\$537
Automatic Fire Detection/Alarm System – Special Day Class – Non-Severe	1859.78.4	\$365	\$360
Over 50 Years Old – Elementary	1859.78.6	\$8,454	\$8,342
Over 50 Years Old – Middle	1859.78.6	\$8,942	\$8,823
Over 50 Years Old – High	1859.78.6	\$11,705	\$11,549
Over 50 Years Old – Special Day Class – Severe	1859.78.6	\$26,948	\$26,590
Over 50 Years Old – Special Day Class – Non-Severe	1859.78.6	\$18,019	\$17,779
Over 50 Years Old – State Special Day School – Severe	1859.78.6	\$44,910	\$44,313

ATTACHMENT B

**ANNUAL ADJUSTMENT TO SCHOOL FACILITY PROGRAM GRANTS**

State Allocation Board Meeting, January 24, 2024

Grant Amount Adjustments

<b>New Construction / Modernization / Facility Hardship / Seismic Mitigation / Joint Use</b>	<b>SFP Regulation Section</b>	<b>Adjusted Grant Amount Effective 1-1-23</b>	<b>Adjusted Grant Amount Effective 1-1-24</b>
Therapy/Multipurpose Room/Other (per square foot)	1859.72 1859.73.2 1859.77.3 1859.82.1 1859.82.2 1859.125 1859.125.1	\$262	\$259
Toilet Facilities (per square foot)	1859.72 1859.73.2 1859.82.1 1859.82.2 1859.125 1859.125.1	\$470	\$464
Portable Therapy/Multipurpose Room/Other (per square foot)	1859.72 1859.73.2 1859.77.3 1859.82.1 1859.125 1859.125.1	\$59	\$58
Portable Toilet Facilities (per square foot)	1859.72 1859.73.2 1859.82.1 1859.125 1859.125.1	\$152	\$150

<b>New Construction Only</b>	<b>SFP Regulation Section</b>	<b>Adjusted Grant Amount Effective 1-1-23</b>	<b>Adjusted Grant Amount Effective 1-1-24</b>
Parking Spaces (per stall)	1859.76	\$20,325	\$20,055
General Site Grant (per acre for additional acreage being acquired)	1859.76	\$26,016	\$25,670
Project Assistance (for school district with less than 2,500 pupils)	1859.73.1	\$9,775	\$9,645

## Appendix G

### Impacts of the Sunrise Tomorrow Specific Plan

This planned development would replace the current mall area with a variety of buildings with various uses.

The current development plans indicate the following maximum areas:

- Residential = 2,220 units
- Hotel = 480 rooms
- Retail = 320,000 square feet
- Office = 960,000 square feet
- Community/Institutional = 450,000 square feet

The net fee on the residential portion of the replacement development is calculated by providing a credit for the commercial development being replaced and subtracting that credit from the current residential rate for new development, resulting in a net fee that reflects the additional impact created by replacing commercial development with residential development. Residential development would be subject to a net fee of \$5.17 (residential rate) - 0.84 (commercial rate) = **\$4.33** per square foot for the area of the prior Sunrise Mall that is replaced with residential development. For any portion of the residential development that is identified as senior only and meets the requirements of a senior only development, the rate would only be \$0.84 per square foot as it qualifies for a discounted rate equal to the commercial fee. For any portion of the residential development that is in excess of the original building area of the existing buildings, the standard rates for new development would apply.

Hotel development is considered commercial development and generates an impact of \$0.94 per square foot (see "Lodging" in Table 13). However, the mall had an impact of \$1.28 per square foot (see "Community Shopping Center" in Table 13). Therefore, the hotel development areas would not generate an increased impacts on the school district and would not be subject to a development impact fee for the portion of the area of the project that is replacing the existing are of the mall. For any portions that are in excess of the current mall area, the standard fee of \$0.84 per square foot would apply.

Retail development would generate an impact of \$2.27 per square foot (see "Neighborhood Shopping Center" in Table 13). After subtracting the Mall's impact of \$1.28 there is a net impact of \$0.99 per square foot. Since the maximum allowable rate is currently \$0.84 this category of development would be subject to a fee of \$0.84 per square foot.

Office spaces generate an impact that ranges from \$2.25 to \$4.01 per square foot. The net impact after deducting the current mall amount of \$1.28 per square foot results in a range of \$0.97 to \$2.73 per square foot. Therefore, Office spaces would be subject to the current maximum allowable rate of \$0.84 per square foot.

Community/Institutional spaces include child care centers, gyms and community centers based on the description in the specific plan. These types of spaces would have a similar impact to the retail development and therefore would have a net impact of \$0.84 per square foot.

The total planned development will likely exceed the existing mall area of 1,100,000 square feet.

In the event the specifications of this planned development and the proposed use of space is modified by the developer, the District reserves the right to adjust its imposition of fees accordingly in order to ensure the burden created on the District by the development is mitigated.





# San Juan Unified School District

## Developer Fee Justification Study Level 1 Fees

April 9, 2024

1

## PURPOSE OF DEVELOPER FEES

To pay for the construction or reconstruction of school facilities necessitated by student population increases resulting from development.

(See, *Cresta Bella, L.P. v. Poway Unified School District* (2013) 218 Cal.App.4th 438; Ed. Code, § 17620(a)(1).)

2

2



## JANUARY 24, 2024

# SAB RAISES LEVEL 1 DEVELOPER FEES 7.84%

At the January 24, 2024, meeting of the State Allocation Board, the Board approved a 7.84% increase to the maximum Level 1 Developer Fees authorized to be collected by school districts pursuant to Education Code section 17620.

The new approved rates are:

- \$5.17 per square foot for residential development (an increase of \$0.38)
- \$0.84 per square foot for commercial/industrial development (an increase of \$0.06)

3

3



## RATIONALE

### REASONS FOR NEW STUDY

- Ed code section 17620
- Assess impacts to accommodate students generated new development projects
- High cost of construction
- Standard to update fees every two years as inflation adjustments are approved by the State Allocation Board

4

4

## 2024 DEVELOPER FEE STUDY

Requires justification study establishing:

- Purpose of the fee;
- Use to which the fee is to be put;
- Reasonable relationship between the fee's use and the type of development project, and;
- Reasonable relationship between the need for the public facility and the type of development project on which the fee is imposed

(Gov. Code, § 66001)



5

5

## CURRENT STATUS OF SJUSD LEVEL 1 FEES

### Residential Projects

- Current Statutory Fee = \$4.79
- Increased Statutory Fee = \$5.17
- Net Increase in Fee = \$0.38

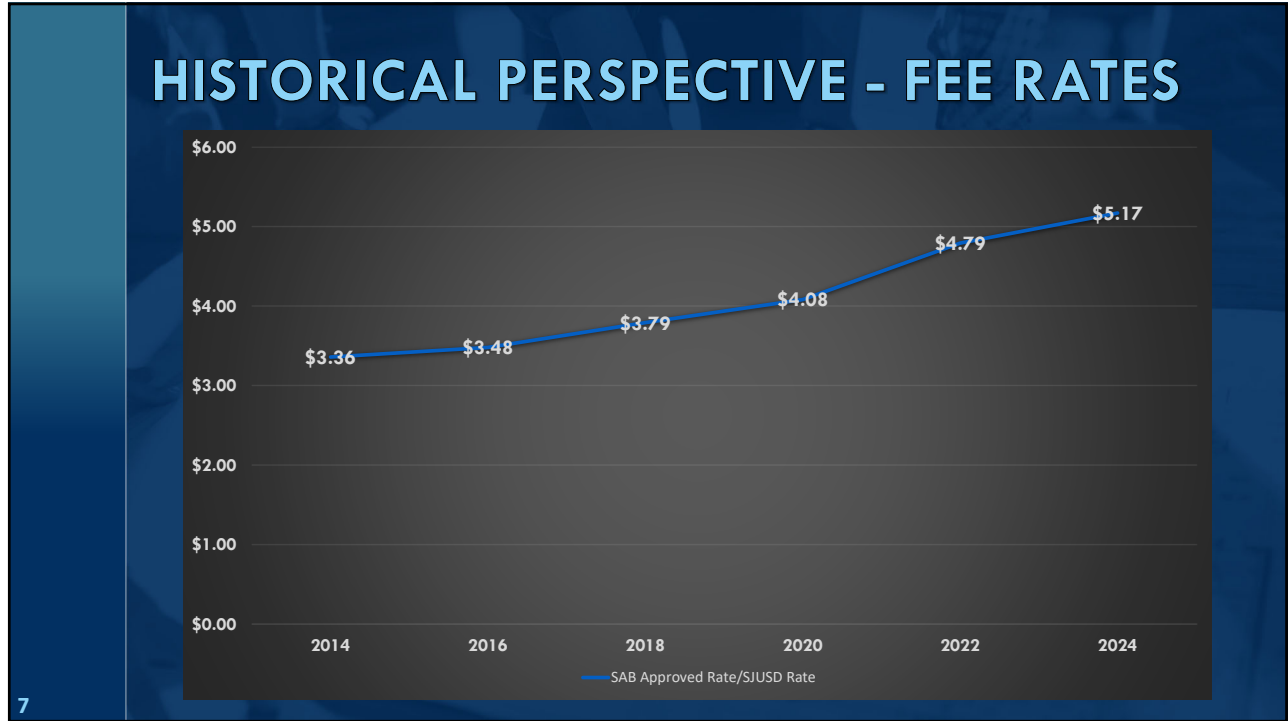
### Commercial Projects

- Current Statutory Fee = \$0.78
- Increased Statutory Fee = \$0.84
- Net Increase in Fee = \$0.06
- Rental Self Storage = \$0.05  
(no change from 2022)



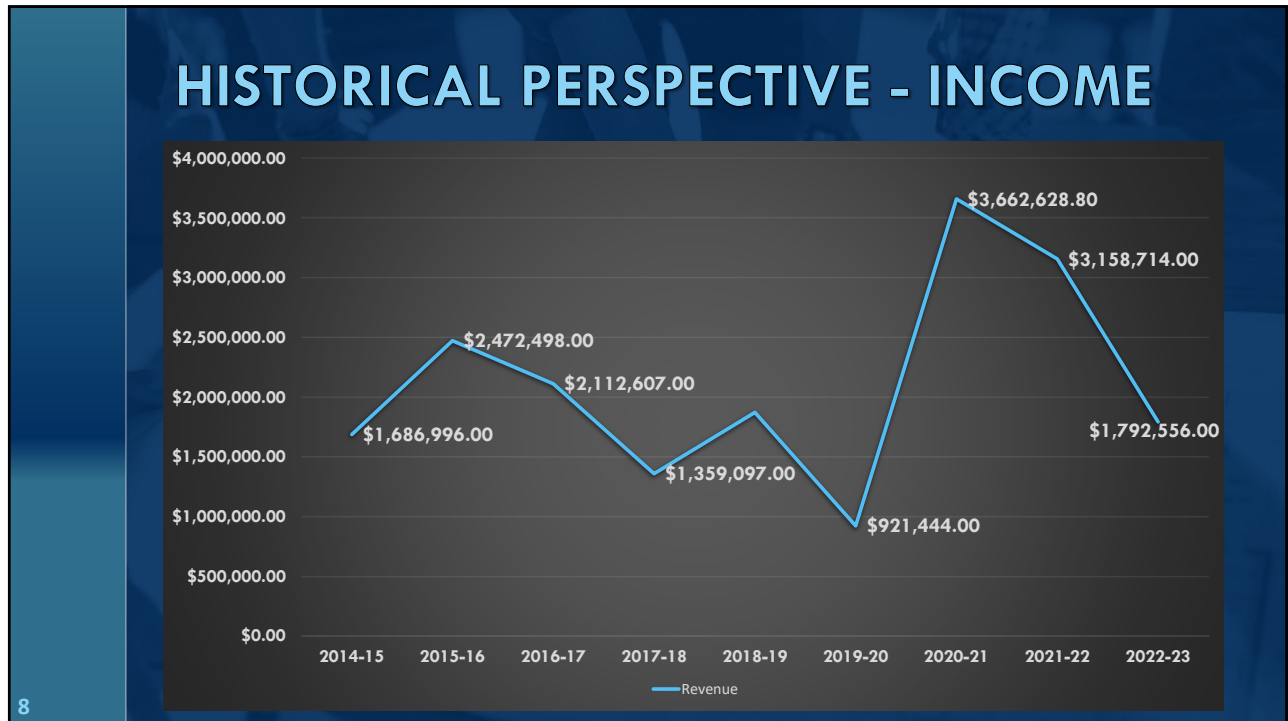
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## SAN JUAN USD STUDENT FORECAST 2023-2030 PLANNED RESIDENTIAL DEVELOPMENT LISTING

Map ID#	Project	Developer	Study Area	Total Units	Unit Type	*Units Remaining	Status	Estimate First Occupancies	Estimate Full Occupancy
<b>Carmichael ES</b>									
14	The Paseos at Carmichael	Homes by Towne	406	45	SFD	45	Active	2024	2025
16	Weatherstone		406	22	SFD	22	Active	2024	2025
<b>Carriage Drive ES</b>									
3	Bearpaw Village Apartments	Bearpaw Equities	137	42	APT	42	Planned	2025	2026
<b>Edison K8</b>									
8	Hurley Apts	Rowin Acaso	577	18	APT	18	Planned	2026	2026
<b>Howe ES</b>									
10	Summer Trace Apts	Mogavero Architects	508	47	APT	47	Planned	2025	2025
11	Summer Trace II Apts	Mogavero Architects	509	49	APT	49	Planned	2025	2025
<b>Kingswood K8</b>									
7	Heritage at Mitchell Village	KB Homes	162	72	SFD	8	Active	Currently occupying	2024
18	Wyatt Ranch	CEC Homes	150	23	SFD	10	Active	Currently occupying	2024
<b>Legette ES</b>									
9	Olive Grove Town Homes	Mitch McAllister	312	12	MFA	12	Active	2024	2025
<b>Mariemont ES</b>									
2	Arden Hills Estates	JTS Engineering	545	33	SFD	33	Planned	2025	2025
<b>Northridge ES</b>									
6	Heritage at Gum Ranch	Elliott Homes	240	340	SFD	204	Active	Currently occupying	2028
13	Sunrise Vista Apts		234	30	APT	30	Planned	2025	2025
<b>Ottomon ES</b>									
4	Canyon Terrace Apts Expansion	Canyon Terrace Folsom, LLC	93	96	APT	96	Planned	2024	2025
<b>Pasadena ES</b>									
5	Engle Rd Apts	Wang Bros LLC	421	20	APT	20	Planned	2025	2025
<b>Whitney ES</b>									
1	Annadale Luxury Estates	Hausman Architecture	363	21	MFA	21	Planned	2025	2027
17	Whitney Place	CNA Engineering	423	18	SFD	18	Planned	2025	2026
<b>Woodside K8</b>									
12	Sunrise Pointe	Jamboree Housing	163	47	APT	47	Active	2024	2024

9

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## PERMISSIBLE USES OF DEVELOPER FEES

Developer fees may be used for the following purposes:


- ⦿ Construction or reconstruction of school facilities. (Ed. Code, § 17620(a).)
- ⦿ Costs associated with conducting the meeting(s) required for levying a new fee or increasing an existing fee. (Gov. Code, § 66016(c).)
- ⦿ Costs attributable to the increased demand for public facilities reasonably related to the development in order to: (1) refurbish existing facilities to maintain the existing level of service or (2) achieve an adopted level of service that is consistent with a general plan. (Gov. Code, § 66001(g).)

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Thank you.  
Questions?



# San Juan USD Voter Attitudes Towards a Local School Funding Measure

*Key Findings of a Districtwide Survey  
Conducted December 11-17, 2023*









FAIRBANK, MASLIN,  
MAULLIN, METZ  
& ASSOCIATES

220-7014


1

## Survey Specifics and Methodology

Dates	December 11-17, 2023
Survey Type	Dual-mode Voter Survey
Research Population	Likely November 2024 Voters in San Juan USD
Total Interviews	615
Margin of Sampling Error	±4.0% at the 95% Confidence Level
Contact Methods	 Telephone Calls  Email Invitations  Text Invitations
Data Collection Modes	 Telephone Interviews  Online Interviews
Survey Tracking	2016
Languages	English and Spanish

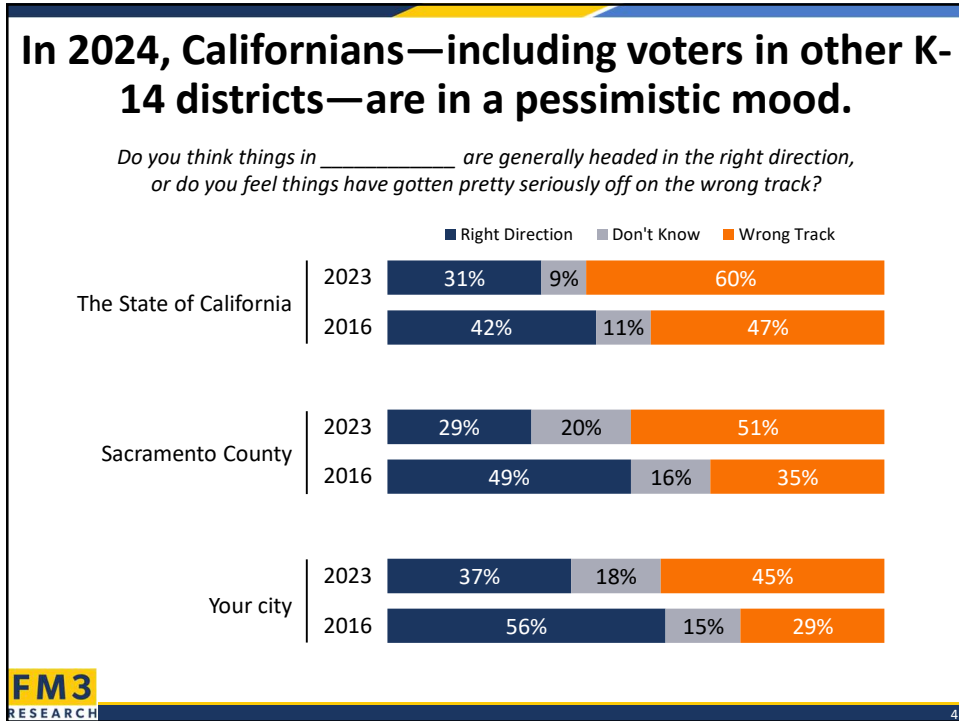

(Note: Not All Results Will Sum to 100% Due to Rounding)

2



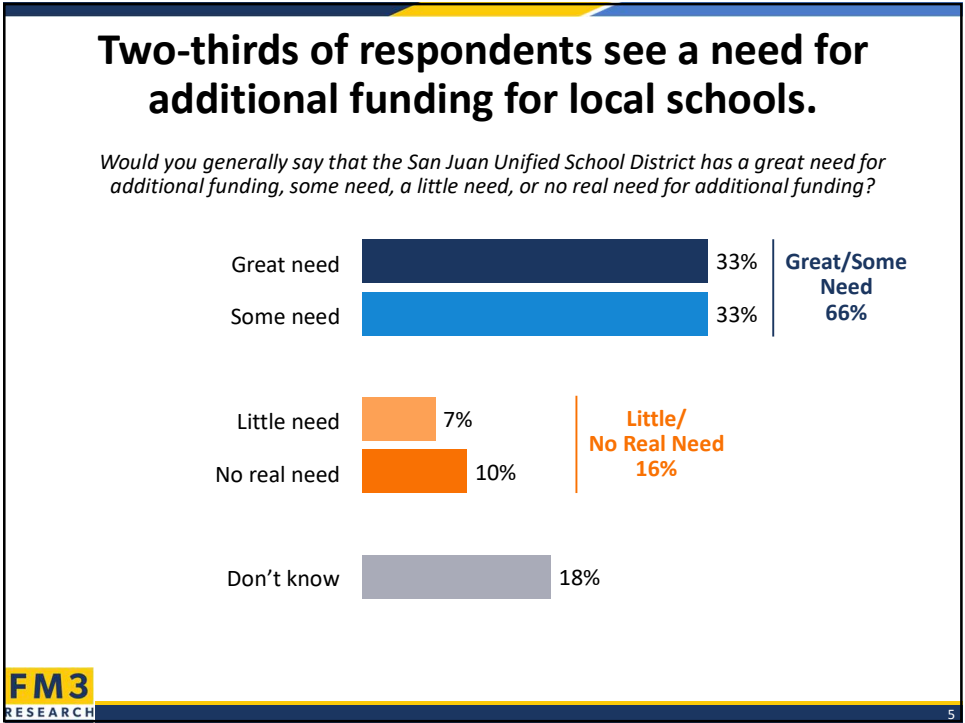
# Issue Context

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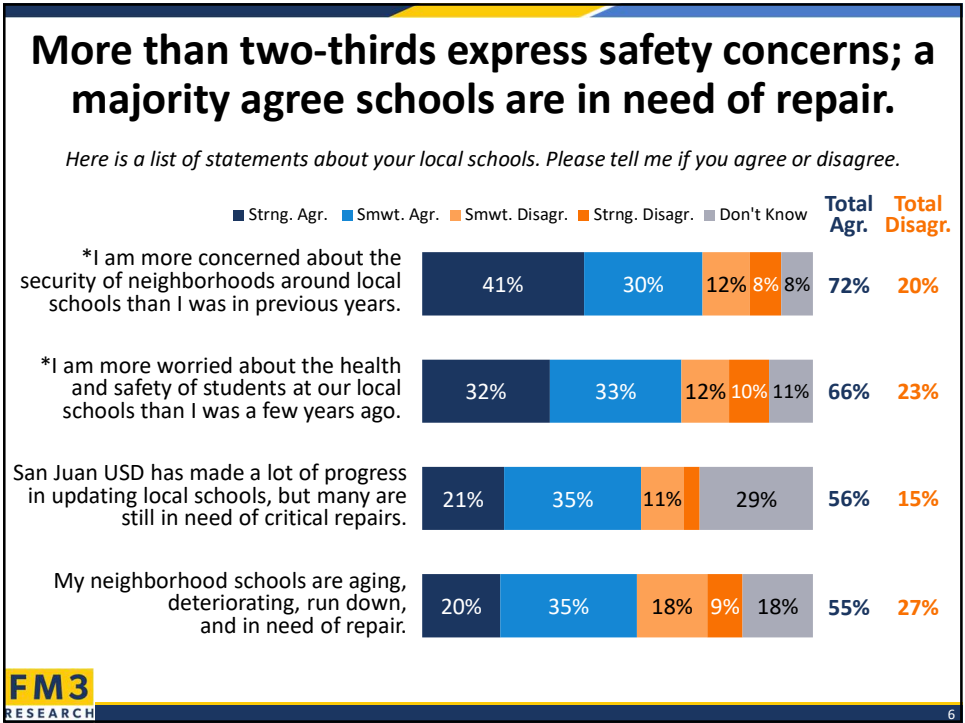


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San Juan Unified  
SCHOOL DISTRICT

## Introducing a Local Education Bond Measure


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### Ballot Language Tested

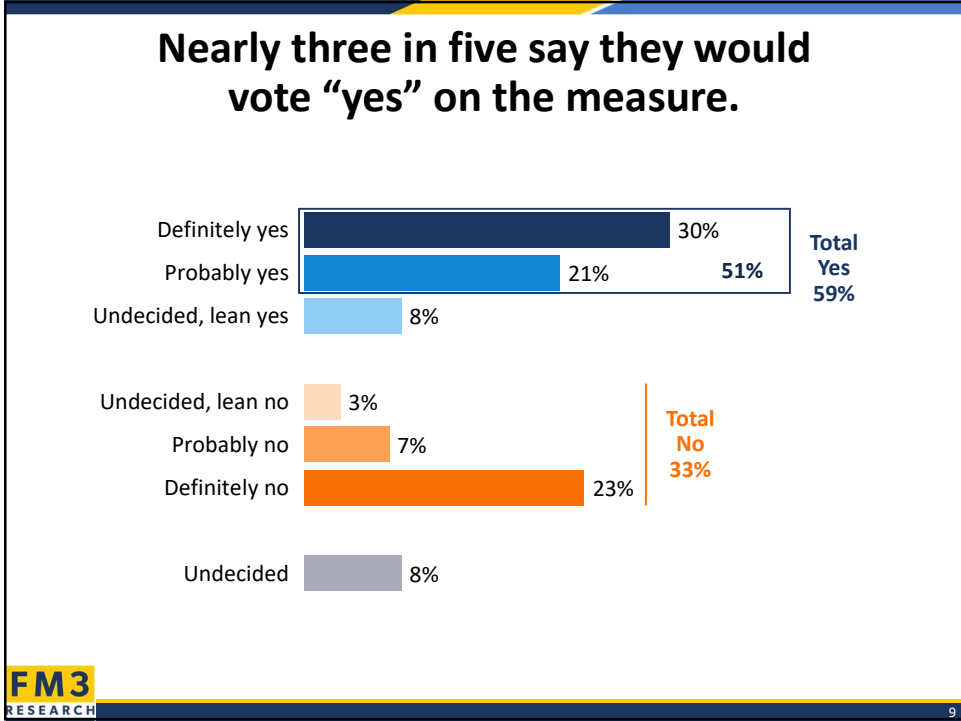
*55% Threshold for Passage; Reviewed by Bond Counsel*

**SAN JUAN UNIFIED SCHOOL DISTRICT SCHOOL SAFETY/CLASSROOM REPAIR MEASURE.**

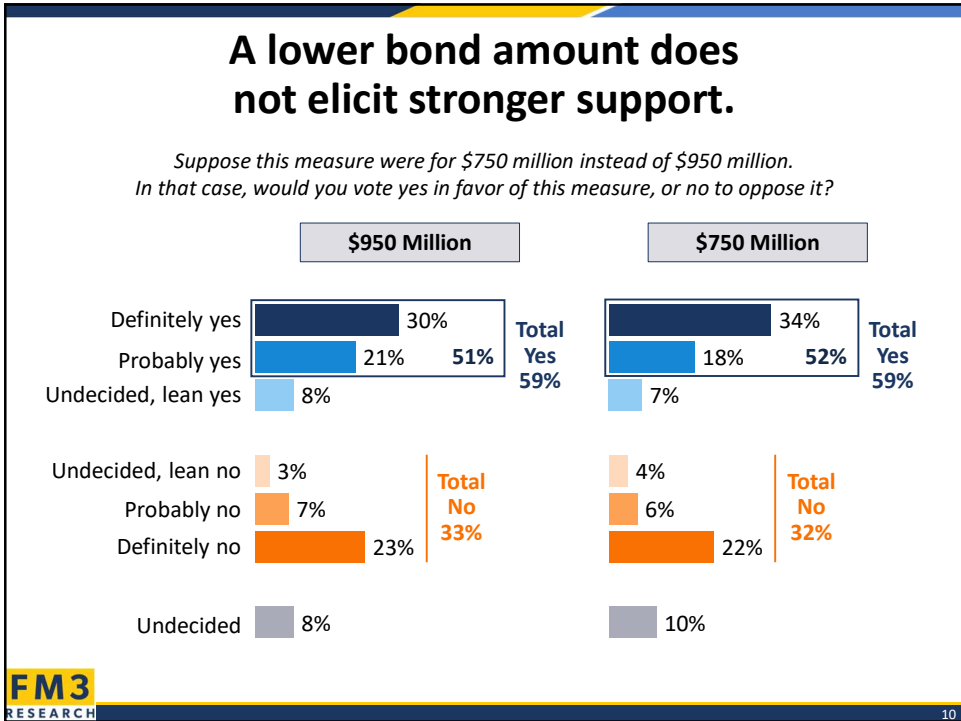
To upgrade schools by repairing aging classrooms, leaky roofs, electrical wiring and deteriorating restrooms/plumbing; improving school security/fire safety; providing safe drinking water; removing asbestos/lead paint/mold; shall the San Juan Unified School District measure be adopted authorizing \$950,000,000 in bonds at legal rates, levying at projected rates of approximately \$60 per \$100,000 of assessed value, generating approximately \$60.5 million annually while bonds are outstanding, with annual independent audits and independent citizens’ oversight?


8

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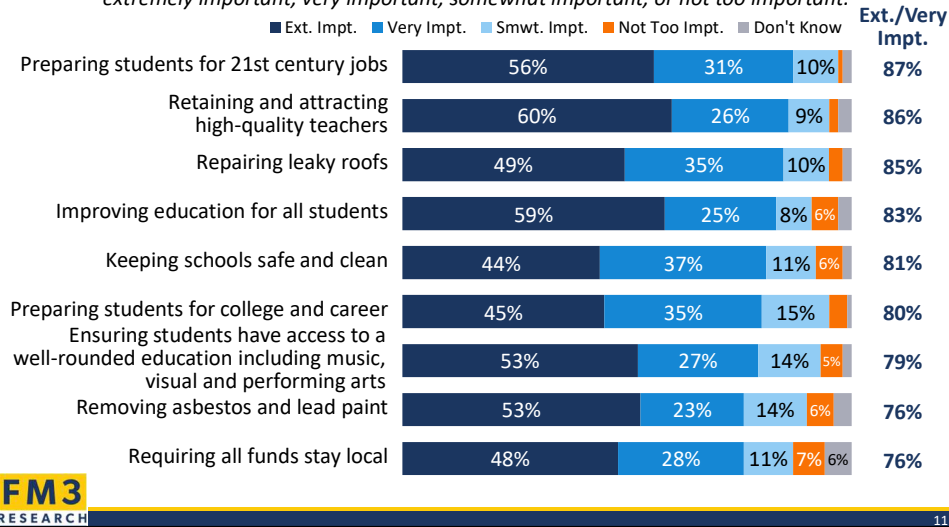
9



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### Preparing students for 21<sup>st</sup> century jobs, retaining high quality teachers and repairing leaky roofs are the top priorities.

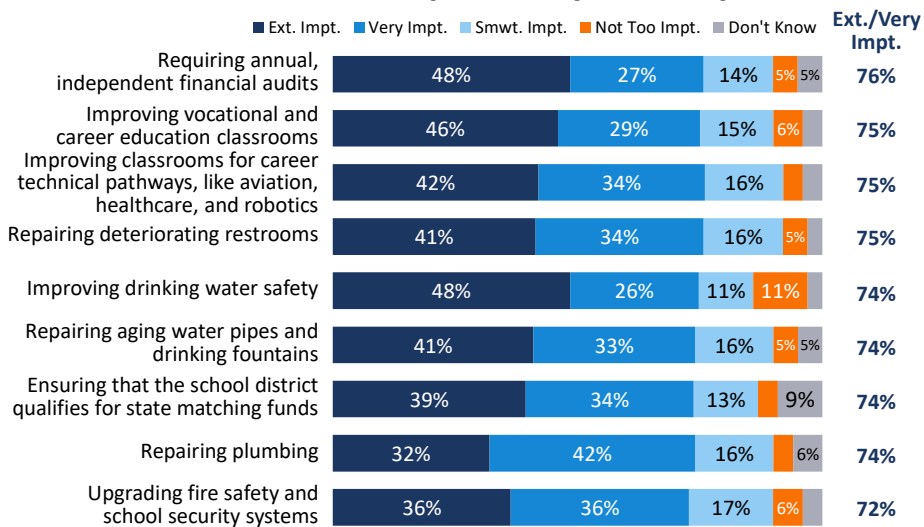
*I am going to read you a list of types of projects that could be funded, or provisions that could be included in this measure. Please tell me how important each is to you: extremely important, very important, somewhat important, or not too important.*



11

11

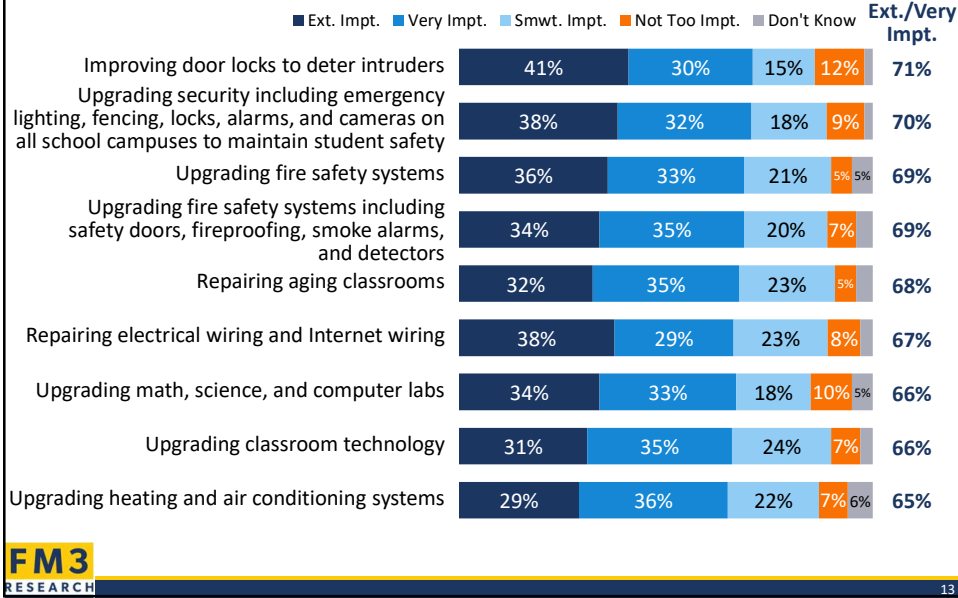
### Three-quarters view audits, vocational education and career technical pathways as important.



12

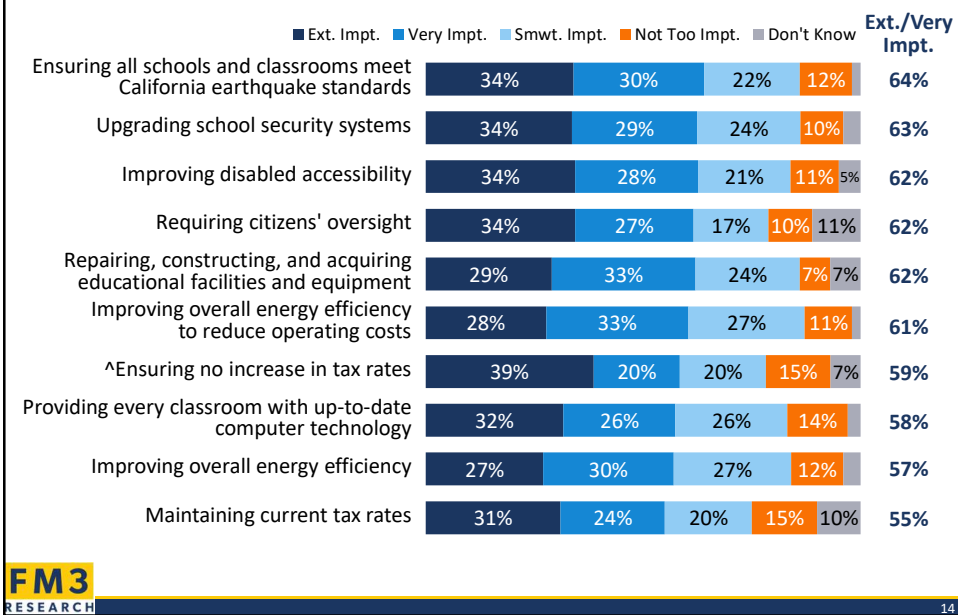
12

## Seven in ten view improving security and fire safety as important.

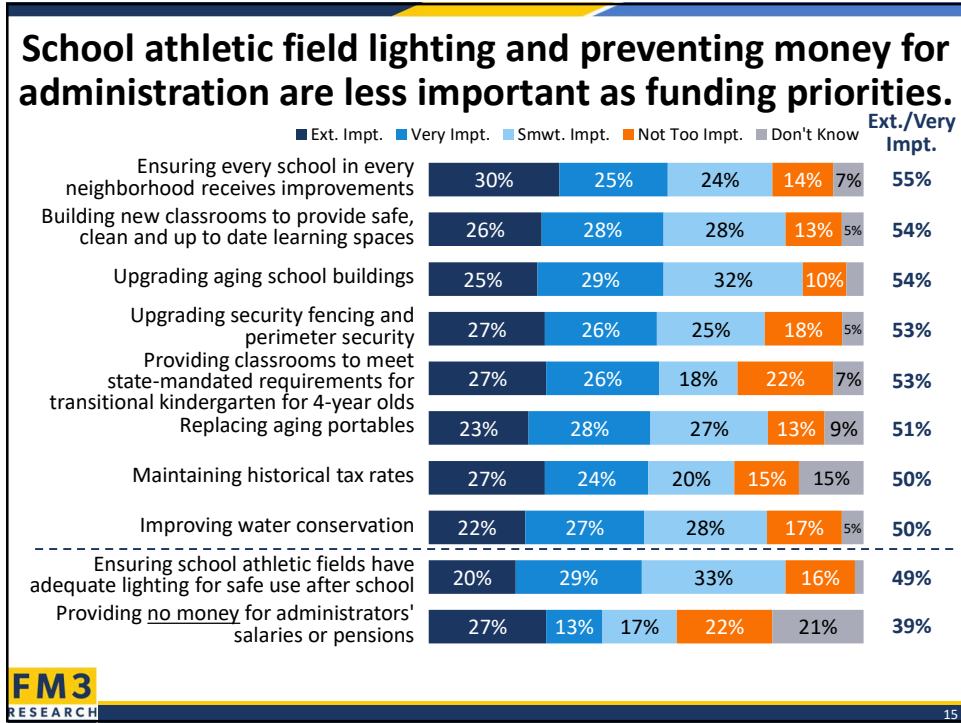


13

## A majority say meeting earthquake standards, school security systems and disabled accessibility are important.



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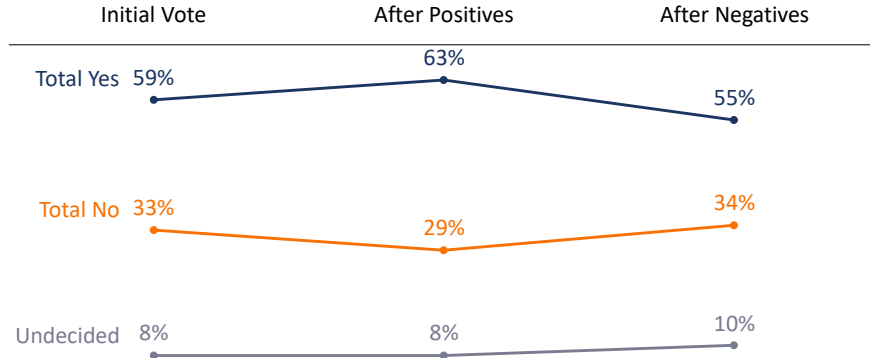
15

San Juan Unified  
SCHOOL DISTRICT

# Messaging

16

## After messaging, support is at the 55% threshold for passage.



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17

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## Educational Messaging of the Bond Measure

*(Ranked by Very Convincing)*

<b>42%</b>	<b>(REPAIRS)</b> Many local schools are over 70 years old and in need of significant repairs. A recent report showed that we have as much as \$2 billion in need. Passing this measure will enable schools to fix deteriorating classrooms, leaky roofs, water pipes, plumbing, bathrooms, and electrical wiring; remove asbestos and lead paint; and replace outdated security and fire safety systems so children can learn in safe, healthy classrooms.
<b>42%</b>	<b>(LEAD)</b> A California state audit found that Sacramento County tops the list for the most kids with lead poisoning. Lead is a toxic metal that can cause serious health problems to kids. This measure will help us immediately remove any remaining lead paint from our schools to ensure that our kids are learning in a healthy environment.
<b>40%</b>	<b>(ACCOUNTABILITY)</b> This measure is subject to strict accountability requirements, including independent annual financial audits, review of all spending by a citizens' oversight committee, and no funding can be used for administrators' salaries or pensions. By law, all funds are required to be spent locally to improve neighborhood San Juan USD schools.
<b>37%</b>	<b>*(TEACHERS)</b> Quality classrooms and good teachers are essential to classroom education. This measure will improve the quality of education for every student, and help attract and retain quality teachers by improving classrooms and teaching environments.

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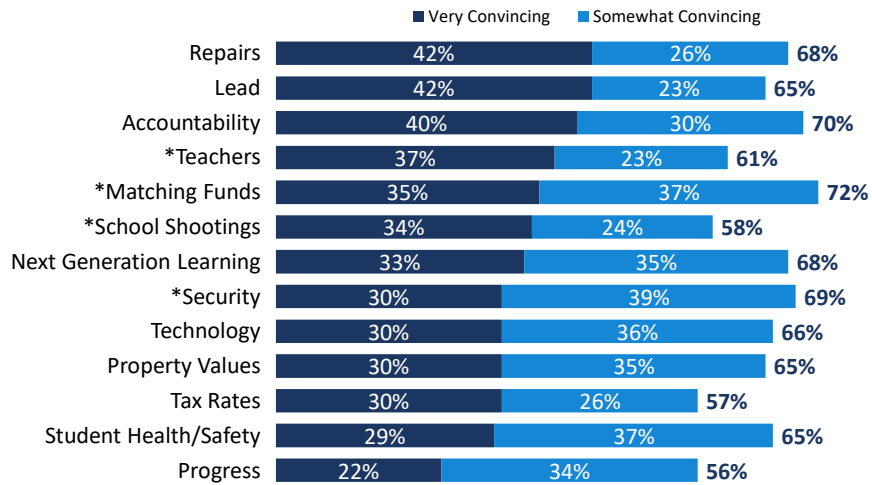
## Educational Messaging (Continued)

(Ranked by Very Convincing)

<b>30%</b>	<b>(TECHNOLOGY)</b> Today's competitive global economy requires students are well trained to use modern technology. This bond measure will upgrade science and computer labs, libraries, and classroom technology, so students can learn the vital skills needed to go to college or compete for good jobs.
<b>30%</b>	<b>(PROPERTY VALUES)</b> This measure is a good long-term investment. Improving neighborhood schools strengthens local property values, and makes our community a more desirable place to live, do business, and raise a family.
<b>30%</b>	<b>(TAX RATES)</b> This bond measure will <u>not</u> increase tax rates but it will continue to provide much-needed funding to repair our aging local schools and continue to prepare students for college and career.
<b>29%</b>	<b>(STUDENT HEALTH/SAFETY)</b> This measure will protect our students' health and safety by upgrading aging utilities, and heating and cooling systems, and improving fire and emergency communications systems. By funding these upgrades we can ensure our students' environment is safer both on a day-to-day basis and in case of an emergency.
<b>22%</b>	<b>(PROGRESS)</b> San Juan USD's last bond led to safer, cleaner schools, heightened security, and high quality learning environments throughout the District; but despite the District's smart financial management, many needs remain and the longer these are delayed, the more expensive they will become.



## Messaging focused on core repairs, lead in the Sacramento area, and accountability resonate strongly.







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## Conclusions

- The proposed San Juan USD measure appears viable. However, AB 195 now requires more tax information in the ballot questions itself. At the same time, the mood of Californians has worsened. Unlike 2016, support for the measure is far closer to the threshold for passage.
- Fifty-nine percent of voters say they would vote “yes” on the measure.
- A smaller \$750 million bond doesn’t lead to a meaningful increase in support.
- The top priorities are preparing students for 21<sup>st</sup> century jobs, retaining and attracting high quality teachers, repairing leaky roofs, improving education for all students, keeping schools safe and clean, and preparing students for college and career.
- Support for the measure reaches a high-water mark 63% after information but with opposition, declines to 55%--speaking to the need of building consensus.
  - The most compelling info: basic repairs, lead contamination, and fiscal accountability.
  - Matching funds and retaining high quality teachers are also widely appealing.

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## Thumbnail Timeline if Proceeding

- Engage the Community (March – June)
  - This will primarily involve myself and the Superintendent attending key meetings with local leaders, embedding content in our Facilities Master Plan site visits and soliciting feedback from our community through direct mail about their local schools
- Conduct a tracking survey in Late May/June to confirm viability
- If viable, the Board would need to take action prior to August 8, 2024 in order to qualify a measure for the November 5, 2024 Presidential Ballot. (*Sacramento County would prefer us to file by end of July*)
  - Ballot materials including Resolution and Ordinance with Expenditure Plan
  - Tax rate statement



For more information,  
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Fax (510) 451-0384



FAIRBANK, MASLIN,  
MAULLIN, METZ  
& ASSOCIATES

# Facilities Committee Attendance Summary 2023-2024

Committee Members (Initials: board members)	09-05-2023	10-03-2023	11-07-2023	12-05-2023	01-02-2024	02-06-2024	03-05-2024	04-02-2024	05-07-2024	06-04-2024
Frank Cockrell (ZC)					*	X	X			
Rachel Andrakowicz (TK)	X		X		*					
Steve Ward (SH)	X	X	X	X	C	X	X			
Ashley Freer (PV)	X	X	X	X	A		X			
Zachary Morton (BA)					N	X	X			
Tina Cooper (PC)	X		X	X	C					
Lupita Alcala (PV)**	X		X	X	E	X				
Melinda Avey (SH)*	X	X	X	X	L	X	X			
Fedros Yavrom (PC)	X		X	X	L					
Jodi Mulligan-Pfile (ZC)	X	X	X	X	E	X	X			
Murad "Moe" Sarama (MP)	X	X	X	X	D	X				
Peter McKane (BA)			X	X	*		X			
Josh Alvarado (TK)			X	X	*	X	X			

**Board of Education / Appointees (Term Expires)**

Pam Costa (12/24)  
Saul Hernandez (12/24)  
Paula Villescaz (12/24)  
Zima Creason (12/26)  
Ben Avey (12/26)  
Manny Perez (12/26)  
Tanya Kravchuk (12/26)

*Fedros Yavrom (07/24)*  
*Steve Ward (12/24)*  
*Lupita Alcala (07/24)\*\**  
*Frank Cockrell (07/24)*  
*Zachary Morton (07/24)*  
*Murad "Moe" Sarama (12/24)*  
*Rachel Andrakowicz (12/24)*

*Tina Cooper (12/24)*  
*Melinda Avey (12/24)\**  
*Ashley Freer (12/24)*  
*Jodi Mulligan-Pfile (07/25)*  
*Peter McKane (12/24)*  
-  
*Josh Alvarado (07/25)*

\*Chair

\*\*Assistant Chair

**SAN JUAN UNIFIED SCHOOL DISTRICT  
TENTATIVE BOARD AGENDA ITEMS  
2023-2024**

**APRIL 9**

Recognition: School Bus Driver's Appreciation Day (Apr. 23) – A	Toto
Universal Prekindergarten Planning and Implementation Update – R	Townsend-Snider
Choices Charter School Salary Schedule Adjustment – D	Ginter
Developer Fees Justification Study – A	Camarda
Public Hearing: Increase in District Developer Fees – PH/A	Camarda
Non-Permitted Use of Facilities – D	Gaddis/Camarda
Governance Handbook – D	Allen
Williams Complaint Report – R	Gaddis
Cabinet Contract – A	Gaddis
Proposed Board Meeting Dates for 2024-2025 – A	Board

**APRIL 23**

Recognition: California Day of the Teacher (May 8) – A	Toto
Recognition: National Nurses Week and National School Nurse Day (May 6-12 & May 8) – A	Calvin
2022-2023 Audit Report – A	Ryan
Elevating Youth Voice – R	Calvin
Instructional Materials Adoptions – D	Slavensky
New High School Courses – D	Slavensky
Choices Charter School Salary Schedule Adjustment – A [Discussed 04/09/24]	Ginter
*Governance Handbook – A [Discussed 04/09/24]	Allen
*Audit Report for Measures J, N, P and S – A	Ryan

**MAY 14**

Recognition: National Speech Pathologist Day (May 18) – A	Calvin
Recognition: Classified School Employee Week (May 19-25) – A	Toto
Strategic Plan – D	Allen
English Learner Update – R	Calvin
Hearing Officer's Recommendation-2024 RIF (if applicable) – A	Gaddis
*Instructional Materials Adoptions – A [Discussed 04/23/24]	Slavensky
*New High School Courses – A [Discussed 04/23/24]	Slavensky
*Approval of CTE 2024 Advisory Committee Roster – A	Schnepf
*Head Start/Early Head Start COLA Funding Allocation 2024-2025 – A	Townsend-Snider
*Resolution: CSPP Continued Funding Application Designated Personnel 2024-2025 – A	Townsend-Snider

**MAY 28**

Recognition: National Science Bowl (if applicable) – A	Schnepf
Recognition: Science Olympiad (if applicable) – A	Schnepf
Recognition: Academic Decathlon (if applicable) – A	Schnepf
District K-12 Mathematics Update – R	Slavensky
Expanded Learning Opportunities Program (ELO-P) Update – R	Calvin
Middle School Boundary Adjustments – D	Camarda
Strategic Plan – A [Discussed 05/14/24]	Allen
*Head Start/Early Head Start Contract Resolution FY 2024-2025 – A	Townsend-Snider

**JUNE 11**

Public Hearing: LCAP – D	Slavensky
Public Hearing: LCAP Choices Charter School – D	Ginter
Public Hearing: Adoption of the 2024-2025 Budget – D	Ryan
Temporary Interfund Borrowing of Cash – A	Ryan
Alder Teacher Residency Update – R	Slavensky

- \*Middle School Boundary Adjustments – A [Discussed 05/28/24]
- \*CIF Superintendent Designation of Representatives 2024-2025 – A
- \*ECE Program Self-Evaluation for CDE – A

Camarda  
 Schnepf  
 Townsend-Snider

**JUNE 25**

- California School Dashboard Local Indicators – R
- LCAP – A [Public Hearing 06/11/24]
- Choices Charter School California School Dashboard Local Indicators – R
- LCAP Choices Charter School – A [Public Hearing 06/11/24]
- Safety and Safe Schools Update – R
- Adoption of the 2024-2025 Budget – A [Public Hearing 06/11/24]
- \*2023-2024 Actuarial Report (OPEB) – A
- \*Charter School 2022-2023 Audit Reports (AAT, CMP, GIS, GV, OFY, VIE) – A
- \*2024-2025 School Plan for Student Achievement (SPSAs) – A

Slavensky  
 Slavensky  
 Ginter  
 Ginter  
 Allen  
 Ryan  
 Ryan  
 Ryan  
 Calvin

D=discussion; A=action; \*=consent; R=report; PC=public comment