



RUSD

Riverside Unified School District 2024 Fee Justification Study

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TABLE OF CONTENTS

EXECUTIVE SUMMARY.....	1
SECTION I. LEGISLATION AND LEGAL REQUIREMENTS.....	4
SECTION II. PROJECTED UNHOUSED STUDENTS AND ESTIMATED FACILITY AND PER STUDENT COSTS	6
A. SCHOOL DISTRICT CAPACITY AND STUDENT ENROLLMENT	6
B. PROJECTED UNHOUSED STUDENTS	7
C. FACILITY NEEDS AND ESTIMATED PER SEAT/STUDENT COST	10
SECTION III. PROJECTED IMPACT OF RESIDENTIAL DEVELOPMENT	12
SECTION IV. COMMERCIAL/INDUSTRIAL SCHOOL IMPACT ANALYSIS	14
A. EMPLOYEE GENERATION.....	14
B. RESIDENTIAL IMPACT	15
C. NET IMPACT PER COMMERCIAL/INDUSTRIAL SQUARE FOOT	19
D. COMMERCIAL/INDUSTRIAL DEVELOPMENT NOT IN PRESCRIBED CATEGORIES	22
E. AGE-RESTRICTED (SENIOR) HOUSING	23
SECTION V. REDEVELOPMENT	24
SECTION VI. GOVERNMENT CODE SECTION 66000.....	25

APPENDICES

- Appendix A – Commercial/Industrial Development Descriptions
- Appendix B – Facilities Capacity Update
- Appendix C – Enrollment Summary
- Appendix D – Student Generation Rates

EXECUTIVE SUMMARY

Education Code Section 17620 authorizes the governing board of a school district to levy school fees to offset the impacts to school facilities from new residential and commercial/industrial construction and reconstruction. In order to levy Level I fees (statutory fees), a school district must prepare and adopt a fee justification study pursuant to the provisions of Education Code Section 17620 and Sections 65995 and 66001 of the Government Code. The fee justification study serves as the basis for justifying the levy of Level I fees and presents and documents the nexus findings required by State law.

This Fee Justification Study (“Study”) has been prepared for the Riverside Unified School District (“School District”) to demonstrate the relationship between new residential and commercial/industrial development and the School District’s need for the construction of school facilities, the cost of the school facilities, and the per square foot amount of Level I fees (“School Fees”) that may be levied by the School District on residential and commercial/industrial development in accordance with applicable law.

The State Allocation Board (“SAB”) reviews and may adjust the maximum authorized School Fees every January in even-numbered years. The SAB increased the Level I fee on January, 24, 2024 and the maximum School Fees authorized by Education Code Section 17620 are currently \$5.17 per square foot for residential construction/reconstruction and \$0.84 per square foot for commercial/industrial construction for unified school districts.

The School District serves areas within the City of Riverside, City of Jurupa Valley (the “Cities”) and portions of Unincorporated Riverside County (“County”) and provides education for transitional kindergarten (TK) through 12th grade.

Residential Development

New residential development in the School District is projected over the next ten (10) years and beyond. Based on student generation rates determined for the School District, new residential development could generate an estimated 652 new students over the next ten (10) years. An analysis of the School District’s existing facilities capacity and enrollment demonstrates the need for the construction, reconstruction, and implementation of capital improvements in order to adequately house the projected student enrollment population. The school facilities cost impact per residential square foot as determined in this Study are shown in Table E-1.

TABLE E-1
Residential School Facilities Cost Impact/ Applicable Residential School Fee Per Square Foot

Impact Per Square Foot	Applicable Residential School Fee Per Square Foot
\$5.60	\$5.17

The cost impact per square foot of residential construction/reconstruction shown in Table E-1 is greater than the maximum authorized residential School Fee, which is \$5.17 per square foot; therefore, the School District is reasonably justified in levying statutory Level I school fees in an amount up to but not exceeding \$5.17 per square foot (the “Applicable Residential School Fee”).

Commercial/Industrial Development

As commercial/industrial properties develop, new jobs are created. Many of the employees working at the new jobs will move into the School District boundaries, thereby increasing the need for new residential development and further impacting the School District’s facilities. Additionally, many employees living outside of but working at new jobs within the School District boundaries will enroll students on an inter-district basis. School Fees may be imposed on commercial/industrial development if the school fees collected on residential development are insufficient to provide adequate school facilities for students generated as a result of new development and nexus findings are presented that justify the imposition of the commercial/industrial school fee.

Section 17621(e)(1)(B) of the Education Code requires that the Study determine the impact of the increased number of employees anticipated to result from commercial/industrial development upon the cost of providing school facilities within the School District. This code section further adds that employee generation estimates shall be based on the applicable employee generation estimates set forth in the January 1990 edition of “San Diego Traffic Generator Study” (“Traffic Study”), a report by San Diego Association of Governments (“SANDAG”). The school facilities cost impacts per commercial/industrial square foot as determined in this Study are shown in Table E-2 by commercial/industrial land use type (each commercial/industrial category is further described in Appendix “A”).

The cost impacts per square foot for each category of commercial/industrial construction are equal to or exceed \$0.84 per square foot, the School District’s maximum authorized School Fee per square foot applicable to new commercial/industrial development; except for Rental Self-Storage and Hospitality/Lodging where a School Fee of \$0.04 and \$0.71 per square foot is justified respectively (“Applicable Com/Ind School Fees”). Therefore, the School District is fully justified in levying commercial/industrial School Fees on new commercial/industrial development in an amount up to but not exceeding the Applicable Com/Ind School Fees. The Applicable Com/Ind School Fees that may be charged by the School District are summarized in Table E-2.

TABLE E-2
Commercial/Industrial School Facilities Cost Impacts/ Applicable School Fees

Commercial/Industrial Category	Impact Per Square Foot	Maximum Applicable School Fees
Banks	\$1.78	\$0.84
Community Shopping Center	\$0.97	\$0.84
Neighborhood Shopping Center	\$1.76	\$0.84
Industrial Business Parks	\$2.22	\$0.84
Industrial Parks/Warehousing/Manufacturing	\$0.85	\$0.84
Rental Self-Storage	\$0.04	\$0.04
Research & Development	\$2.91	\$0.84
Hospitality (Lodging)	\$0.71	\$0.71
Commercial Offices (Standard)	\$3.02	\$0.84
Commercial Offices (Large High Rise)	\$2.86	\$0.84
Corporate Offices	\$1.69	\$0.84
Medical Offices	\$2.69	\$0.84

SECTION I. LEGISLATION AND LEGAL REQUIREMENTS

This section discusses the legislative history of the Level I Fee.

Assembly Bill (“AB”) 2926 enacted by the State in 1986, also known as the “1986 School Facilities Legislation” granted school districts the right to levy fees in order to offset the impacts to school facilities from new residential and commercial development. Originally set forth in Sections 53080 and 65995 of the Government Code, AB 2926 authorized statutory school fees to be levied, commencing January 1, 1987, in the amount of \$1.50 per square foot of new residential assessable space and \$0.25 per square foot of enclosed commercial or industrial assessable space. AB 2926 also provided for an annual increase of the statutory fees based on the Statewide cost index for Class B construction, as determined by the SAB. The provisions of AB 2926 have since been amended and expanded.

AB 1600 was enacted by the State legislature in 1987 and created Government Code Sections 66000 *et seq.* These sections require a public agency to satisfy the following requirements when establishing, increasing or imposing a fee as a condition of approval for a development project:

1. Determine the purpose of the fee;
2. Identify the use to which the fee is to be put;
3. Determine how there is a reasonable relationship between the fee’s use and the type of development project on which the fee is imposed;
4. Determine that there is a reasonable relationship between the need for the public facilities and the type of development project on which the fee is imposed;
5. Determine that there is a reasonable relationship between the amount of the fee and the cost, or portion of the cost of the public facility attributable to the development on which the fee is imposed; and
6. Provide an annual accounting of any portion of the fee remaining unspent or held for projects for more than five (5) years after collection.

AB 181, enacted in 1989, established new requirements for school districts levying school fees and also re-codified Government Code Section 53080 *et seq.* as Education Code Section 17620 *et seq.* The additional provisions established by AB 181 imposed more stringent nexus requirements which must be satisfied by school districts prior to levying school fees, especially with respect to commercial/industrial school fees. Additionally, AB 181 provided that the maximum school fees for residential and commercial/industrial development be subject to an increase every two (2) years rather than annually.

In 1998, Governor Wilson signed into law Senate Bill 50 (“SB 50”), the Leroy F. Greene School Facilities Act of 1998, which reformed State’s School Building Program and developer school fee legislation. A significant provision of SB 50 provides school districts the option of adopting alternative school fees (also known as Level II and Level III fees) in excess of the Level I fee upon meeting certain requirements. SB 50 also placed a \$9.2 billion State Bond measure on the November 3, 1998 ballot (Proposition 1A). With the passage of Proposition 1A in November 1998, SB 50 became operative.

SB 50 also limited the power of cities and counties to require mitigation of school facilities impacts as a condition of approving new development and suspended the court cases known as Mira-Hart-Murrieta. The Mira-Hart-Murrieta cases previously permitted school districts to collect mitigation fees in excess of school fees under certain circumstances.

On November 5, 2002, California voters passed Proposition 47, which authorized the issuance of \$13.05 billion in State bonds and also enacted AB 16, which provided for additional reformation of the School Building Program. AB 16, among other items, clarified that if the SAB is no longer approving apportionments for new construction due to the lack of funds available for new school facilities construction, a school district may increase its Level II Fee to the Level III Fee. With the issuance of the State bonds authorized by the passage of Proposition 47, this section of AB 16 became inoperable.

Furthermore, Proposition 55 was approved on March 2, 2004, which authorized the sale of \$12.3 billion in State bonds. In addition, California voters approved Proposition 1D in the general election held on November 7, 2006. Proposition 1D authorized the issuance of \$10.4 billion in State bonds.

California voters approved Proposition 51 (the California Public School Facility Bonds Initiative) in the general election held on November 8, 2016, authorizing the issuance of \$9 billion in bonds to fund the improvement and construction of school facilities for K-12 schools and community colleges.

SECTION II. PROJECTED UNHOUSED STUDENTS AND ESTIMATED FACILITY AND PER STUDENT COSTS

The objective of this Study is to determine if a nexus exists between future residential and commercial/industrial development and the need for school facilities. In addition, the Study aims to identify the costs of such required school facilities and determine the amount of School Fees that can be justifiably levied on residential and commercial/industrial development according to the estimated impacts caused by such development. This section evaluates whether existing school facilities can accommodate students generated from future residential development, projects student enrollment based on anticipated residential growth, and estimates the costs of school facilities required to accommodate new residential growth. The findings determined in this section are used in following sections to evaluate the cost impact per square foot for new residential and commercial/industrial property. Although many of the figures in this section are primarily derived from residential development projections and impacts, they are adjusted in Section IV. to evaluate the impact of commercial/industrial development.

A. SCHOOL DISTRICT CAPACITY AND STUDENT ENROLLMENT

The School District's existing school facilities capacity and student enrollment were evaluated in order to determine if there is available capacity to house students generated by new residential and commercial/industrial development.

The School District currently operates twenty-nine (29) elementary schools, seven (7) middle schools, five (5) comprehensive high schools, two (2) alternative high schools, one (1) STEM academy, one (1) virtual school, one (1) adult school, and one (1) special education preschool. Per Education Code Section 17071.10, these facilities have a capacity to accommodate 39,600 students. Pursuant to Education Code Section 17071.30, portable classrooms were not included in the calculation to the extent they are (i) leased through the State Relocatable Classroom Program, (ii) leased for a period of less than five (5) years, (iii) leased when needed as interim housing (project basis), or (iv) represent the number of portables that exceed 25% of the School District's permanent classrooms. Appendix "B" provides a calculation of the updated facility capacity. It should be noted these capacities are driven by State loading standards and do not necessarily reflect the School District's program goals or the condition of such facilities.

Based on Student Enrollment Data as of October 2023, the student enrollment of the School District is 38,094 students. A summary of the student enrollment data is included in Appendix "C". Current available capacity is calculated by subtracting current student enrollment from existing school facilities capacity for each school level. This operation results in a surplus of available seats at the elementary school and middle school levels, and deficit seats at the high school level. The available capacity calculation is shown in Table 1.

TABLE 1
Facilities Capacity and Student Enrollment

School Level	Existing Facilities Capacity	Student Enrollment October 2023	Available/ (Deficit) Capacity
Elementary School	20,792	19,772	1,020
Middle School	6,754	5,836	918
High School	12,054	12,486	(432)
Total	39,600	38,094	1,506

B. PROJECTED UNHOUSED STUDENTS

1. Projected Residential Units

To estimate projected residential unit growth over the next ten (10) years, Koppel & Gruber Public Finance ("K&G Public Finance") utilized information from the Planning Departments from the Cities as well as the County of Riverside Planning Department (collectively the "Planning Agencies"), including but not limited to specific plans and tract and land entitlement information. Such information was used to project residential development for areas within each planning jurisdiction by housing type. Based on the information, it is estimated the School District could experience the development of an estimated 2,567 residential units over the next ten (10) years ("Projected Units").

The School District has entered into mitigation agreements with certain property owners and/or developers, whereby the terms of the mitigation agreements require mitigation payments in lieu of paying School Fees. Many of the Projected Units are located within areas subject to mitigation agreements or participate in a community facilities district ("CFD"). Those Projected Units subject to such agreements and/or CFDs have been identified and/or estimated and excluded from the calculation. This Study conservatively assumes for purpose of analysis that the agreements and/or CFDs fully offset the impact of the developments governed by those agreements and/or CFDs, regardless of whether the agreements in fact provide full mitigation.

The types of residential units¹ considered include:

- (i) **Single family detached ("SFD")** –dwelling units with no common walls and assigned an individual and separate assessor's parcel;

¹ Accessory Dwelling Units (ADUs) or Junior ADUs are independent residential dwelling units located on the same parcel as a primary residential dwelling. ADUs may be detached, attached, or located within the primary dwelling, including within garages and storage areas. ADUs are generally considered new construction because they are living areas that did not previously exist on the parcel or as a part of the primary home. Whether ADUs are called casitas, granny flats, in-law units, generational units, or converted living space, these areas are intended to provide a new area for living and sleeping – essentially a new residential unit which did not previously exist. The School District recognizes that students are projected to be generated from ADUs and will charge the appropriate fee rate for these types of new construction projects.

- (ii) **Single family attached (“SFA”)** –dwelling units sharing a common wall with each unit being on a separate and unique assessor’s parcel (e.g. townhouses, condominiums, etc.);
- (iii) **Multi-family units (“MF”)** –dwelling units which share a single assessor’s parcel and share a common wall (e.g. apartments, duplexes, etc.).

It should be noted that Mobile homes are not included in this analysis.² The estimated total Projected Units that are subject to mitigation agreements and/or CFDs (which, for purposes of this Study are deemed “mitigated”) and the remaining unmitigated Projected Units in the entire School District are summarized by residential category in Table 2.

TABLE 2
Projected Units by Residential Category

Residential Category	Total Projected Units	Mitigated Projected Units	Unmitigated Projected Units
Single-Family Detached (SFD)	1,961	1,036	925
Single-Family Attached (SFA)	0	0	0
Multi-Family Attached (MF)	606	0	606
Total	2,567	1,036	1,531

2. Student Generation Rates

In order to calculate student generation rates (“SGRs”), K&G Public Finance first obtained property characteristic data from the County Assessor’s Office. Parcels in the data file were classified by unit type (SFD, SFA and MF) and residential parcels were extracted. Due to the County data missing unit counts in certain instances, K&G Public Finance compiled unit counts based on information from data from the US Census Bureau³ resulting in a total of 53,660 SFDs, 3,530 SFAs and 21,151 MFs within the School District.

K&G Public Finance then obtained a student database from the School District, which contained the school attended, grade level and physical address information for each student enrolled in the School District. The student database is reflective of student enrollment information as of October 2023. The student enrollment address information was matched to the address (situation address) information of parcels in the County property characteristic database. The number of students matched was then queried by school level and residential category. Table 3 provides a summary of the SGRs by school level and residential category. A more detailed analysis of the SGR determinations is contained within Appendix “D”.

² Education Code Section 17625 sets forth the prerequisites that must be met before school districts may levy school fees on mobile homes. Since it is often difficult to determine and make projections relating to mobile homes that meet those requirements, the mobile home category is omitted from this Study.

³ 2022 American Community Survey 5-Year Estimates; DP04-Selected Housing

TABLE 3
Student Generation Rates

School Level	SFD Units	SFA Units	MF Units
Elementary School	0.2264	0.0632	0.1159
Middle School	0.1240	0.0334	0.0622
High School	0.1841	0.0527	0.0823
Total	0.5345	0.1493	0.2604

3. Projected Student Enrollment

Projected student enrollment was determined by multiplying the SGRs in Table 3 by the number of Unmitigated Projected Units as shown in Table 2. A total of 652 students are estimated to be generated from Unmitigated Projected Units. The projected student enrollment is summarized by school level in Table 4.

TABLE 4
Projected Student Enrollment by School Level

School Level	Projected Student Enrollment from Unmitigated Projected Units
Elementary School	279
Middle School	153
High School	220
Total	652

4. Projected Unhoused Students

As shown in Table 1, facilities capacity exceeds enrollment at the elementary school and middle school levels, and a deficit capacity exists at the high school level. While these findings indicate the School District's collective capacity is available to accommodate projected students from new development over the course of the planning period, the analysis doesn't consider (i) the condition and adequacy of existing capacity, (ii) the availability of capacity within areas of the School District where a greater and disproportionate amount of new development is expected; and/or (iii) the service and educational goals of the School District and (iv) that the capacity reported in Table 1 includes seats funded by Mitigated Units, which are generally first reserved for students generated by those units.

As further described in this Study, capacity improvements are necessary for the long-term use to adequately house the existing student population and future enrollment from new housing at all school levels. The School District's facility needs are discussed in more detail in Section II.C.1. The facility needs exist regardless of the availability of capacity to house student enrollment, inclusive of student enrollment generated from new development. Therefore, for the purpose of this analysis, Projected Student Enrollment is not adjusted by available capacity and student enrollment attributable to new housing that requires a seat (facilities), including new facilities and/or facilities to

be replaced for their continued useful life (“Projected Unhoused Students”) is equal to Projected Student Enrollment. Table 5 shows the determination of Projected Unhoused Students by school level.

TABLE 5
Projected Unhoused Students

School Level	Projected Student Enrollment	Available Seat Adjustment	Projected Unhoused Students
Elementary School	279	0	279
Middle School	153	0	153
High School	220	0	220
Total	652	0	652

C. FACILITY NEEDS AND ESTIMATED PER SEAT/STUDENT COST

1. Facilities Needs

Government Code Section 66001 (g) allows School Fees to include the costs attributable to the increased demand for public facilities reasonably related to the development project(s) in which the fee is imposed 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 the general plan. In 2016 the School District conducted a Long-Range Facilities Master Plan (“2016 Plan”) identifying certain capital improvements and modernization needs and preliminary cost estimates for the identified projects. The total budgeted cost of the facilities projects outlined in the 2016 Plan was \$1,306,350,422 in 2016 dollars.

The primary source of funding for the projects is expected from general obligation bond sales issued under the School District’s Measure O bond authorization and State funding. Measure O was a local bond measure approved by the voters on November 8, 2022 and authorized the School District to issue up to \$392,000,000 in bonds to finance capital improvement projects designed to upgrade and improve aging campuses and classrooms, including building new school facilities (“Measure O Authorization”). As of the date of this Study, the School District has issued three series of bonds under the Measure O Authorization totaling \$352,000,000, leaving \$40,000,000 of the authorization pending. Projects that have been funded through Measure “O” as of November 15, 2023 are outlined in the Citizen’s Bond Oversight Committee Report that was presented on February 13, 2024.

The 2016 Plan demonstrates capital improvement projects are necessary for the long-term use and adequate housing of student enrollment at the School District’s existing facilities. Revenues from the imposition the School Fees are intended (i) to help bridge the funding gap between (a) monies available from general obligation bond proceeds, including funding from the Measure O Authorization, or other sources, and (b) the remaining estimated costs of the capital improvement projects outlined in the 2016 Plan

and (ii) other project costs not specified in the 2016 Plan.

Revenues from the imposition of the applicable school fees are intended to fund, in part, estimated costs for the construction of new classroom facilities and capital improvement projects required to accommodate Projected Student Enrollment.

Table 6 below summarizes by school level the eligible cost estimates of proposed capital improvement projects identified in the 2016 Plan. Project expenditures funded through Measure “O” proceeds through November 13, 2023 are subtracted⁴, resulting in Net Eligible Facilities Costs.

Table 6
Estimated Facilities Costs Per School Level

School Level	Eligible Costs from Facilities Master Plan	Project Expenditures through November 15, 2023 ¹	Net Eligible Facilities Costs
Elementary School	\$599,014,281	\$167,388,078	\$431,626,203
Middle School	\$237,269,065	\$14,189,003	\$223,080,062
High School	\$434,953,062	\$49,635,784	\$385,317,278

1. Expenditures represent projects that have been funded through Measure “O” as of November 15, 2023 as outlined in the Citizen’s Bond Oversight Committee Report that was presented on February 13, 2024, and include items in the “Completed” or “Substantially Completed” Phase.

2. Estimated Cost Per Seat/Student

The estimated cost per student to provide adequate school facilities to house Projected Student Enrollment was derived from the estimated costs of projects at specific school sites as outlined in the 2016 Plan minus qualified project expenditures through November 11, 2023. The total costs were then divided by the existing facilities capacity to determine the Total Facilities Cost Impact per Seat/Student, which is shown in Table 7.

TABLE 7
Total Facilities Cost Impact Per Seat/Student

School Level	Net Eligible Facilities Costs	School District Facilities Capacity	Facilities Cost Impact per Seat/Student
Elementary School	\$431,626,203	20,792	\$20,759
Middle School	\$223,080,062	6,754	\$33,029
High School	\$385,317,278	12,054	\$31,966

⁴ Completed and Substantially completed projects that have been funded through Measure “O” as of November 15, 2023 as outlined in the Citizen’s Bond Oversight Committee Report that was presented on February 13, 2024.

SECTION III. PROJECTED IMPACT OF RESIDENTIAL DEVELOPMENT

The following sections present the school facility impact analysis for new residential development and provide step-by-step calculations of the estimated per residential square foot cost impact.

To determine the school facilities cost impact per square foot of residential development, first the Facilities Cost Impact per Seat/Student determined in Table 7 is multiplied by the Projected Unhoused Students as shown in Table 5 for each school level. The result of this computation is shown in Table 8 and reflects the estimated school facilities cost impact to house Projected Unhoused Students.

TABLE 8
Total Facilities Cost Impact

School Level	Facilities Cost Impact per Seat/Student	Projected Unhoused Students	Eligible Facilities Cost Impact Attributable to Unmitigated Projected Units
Elementary School	\$20,759	279	\$5,791,761
Middle School	\$33,029	153	\$5,053,437
High School	\$31,966	220	\$7,032,520
Total			\$17,877,718

The total school facilities impact shown in Table 8 above was then divided by the number of Unmitigated Projected Units shown in Table 2 to determine the school facilities cost per residential unit. The cost per residential unit is shown in Table 9.

TABLE 9
School Facilities Cost per Residential Unit

Total Facilities Cost Impact	Unmitigated Projected Units	Facilities Cost Impact per Residential Unit
\$17,877,718	1,531	\$11,677

The school facilities cost impact per residential square foot is calculated by dividing the school facilities cost per residential unit determined in Table 9 by the weighted average square footage of each residential unit type. This calculation is shown in Table 10. The weighted average square footage of the Unmitigated Projected Units is estimated based on square footage information from recent development projects constructed within the School District.

TABLE 10
School Facilities Cost per Residential Square Foot

Facilities Cost Impact per Residential Unit	Weighted Average Square Footage	Facilities Cost per Residential Square Foot
\$11,677	2,085	\$5.60

The school facilities impact per residential square foot determined in Table 10 is greater than the current maximum authorized residential School Fees of \$5.17 per square foot; therefore, the School District is justified in levying up to but not exceeding the maximum authorized amount for residential construction and reconstruction.

SECTION IV. COMMERCIAL/INDUSTRIAL SCHOOL IMPACT ANALYSIS

The following section presents the school facilities impact analysis for new commercial/industrial development and provides a step-by-step calculation of the estimated per commercial/industrial square foot cost impacts.

A. EMPLOYEE GENERATION

In the course of making the nexus findings to justify School Fees levied on commercial/industrial development, Education Code Section 17621(e)(1)(B) requires that the Study determine the impact of the increased number of employees anticipated to result from commercial/industrial development upon the cost of providing school facilities within the School District. As mentioned in the Executive Summary, for purposes of making such determination this code section further sets out that the employee generation estimates be based on the applicable estimates set forth in the Traffic Study published by SANDAG.

The employee generation estimates per 1,000 square feet of development derived from the Traffic Study are listed by commercial/industrial land use category in Table 11. The land use categories listed are based on those categories described in the Traffic Study and include all land uses recommended by the provisions of Education Code Section 17621(e)(1)(B).

TABLE 11
Employee Generation per 1,000 Square Feet of Commercial/Industrial Development

Commercial/Industrial Category	Average Square Footage per Employee	Employees Per 1,000 Square Feet
Banks	354	2.8253
Community Shopping Center	652	1.5348
Neighborhood Shopping Center	357	2.7985
Industrial Business Parks	284	3.5156
Industrial Parks/Warehousing/Manufacturing	742	1.3473
Rental Self-Storage	15,541	0.0643
Research & Development	329	3.0408
Hospitality (Lodging)	883	1.1325
Commercial Offices (Standard)	209	4.7897
Commercial Offices (Large High Rise)	220	4.5442
Corporate Offices	372	2.6848
Medical Offices	234	4.2654

Source: San Diego Traffic Generator Study, January 1990 Edition; SANDAG.

B. RESIDENTIAL IMPACT

1. Households

To evaluate the impact of commercial/industrial development on School District facilities, the employee generation estimates listed in Table 11 were first used to determine the impact of commercial/industrial development on a per household basis. Based on information derived from U.S. Census Bureau data⁵, there are approximately 1.64 employed persons per household on average for households located within the School District. Dividing the employee generation estimates listed in Table 11 by 1.64 results in the estimated number of households per 1,000 square feet of commercial/industrial development ("Total Household Impact").

The Total Household Impact determined in the preceding paragraph takes into consideration all employees generated from commercial/industrial development. Since some of those employees will live outside the School District and will therefore have no impact on the School District, the figures are adjusted to reflect only those households within the School District occupied by employees generated from commercial/industrial development built within the School District. Based on information derived from U.S. Census Bureau data⁶, it is estimated that approximately 0.422 percent (42.2%) of employees both live and work within the School District. Multiplying the Total Household Impact by 0.422 percent (42.2%) results in the households within the School District impacted per 1,000 square feet commercial/industrial development. The results of these computations are shown in Table 12.

TABLE 12
Impact of Commercial/Industrial Development on Households within the School District

Commercial/Industrial Category	School District Households per 1,000 Square Feet Com./Ind.
Banks	0.7270
Community Shopping Center	0.3949
Neighborhood Shopping Center	0.7201
Industrial Business Parks	0.9046
Industrial Parks/Warehousing/Manufacturing	0.3467
Rental Self-Storage	0.0166
Research & Development	0.7824
Hospitality(Lodging)	0.2914
Commercial Offices (Standard)	1.2325
Commercial Offices (Large High Rise)	1.1693
Corporate Offices	0.6908
Medical Offices	1.0976

⁵ 2022 American Community Survey 5-Year Estimates; DP04-Selected Housing; DP03-Economic Characteristics (Civilian Employed).

⁶ 2022 American Community Survey 5-Year Estimates; S0801-Commuting Characteristics (Work in place of residence).

2. Household Student Generation

The student generation impacts per 1,000 square feet of commercial/industrial development were calculated by multiplying the household impacts shown in Table 12 by blended student generation rates determined for each school level. The result of this calculation is shown in Table 13. The determination of student generation rates are shown and described in Appendix “D” of this Study.

TABLE 13
Student Generation per 1,000 Square Feet of Commercial/Industrial Development

Commercial/Industrial Category	Elementary School Student Generation	Middle School Student Generation	High School Student Generation	Total Student Generation
Banks	0.1328	0.0723	0.1045	0.3096
Community Shopping Center	0.0721	0.0393	0.0568	0.1682
Neighborhood Shopping Center	0.1316	0.0716	0.1036	0.3068
Industrial Business Parks	0.1653	0.0900	0.1301	0.3854
Industrial Parks/Warehousing/ Manufacturing	0.0633	0.0345	0.0499	0.1477
Rental Self-Storage	0.0030	0.0017	0.0024	0.0071
Research & Development	0.1429	0.0778	0.1125	0.3332
Hospitality (Lodging)	0.0532	0.0290	0.0419	0.1241
Commercial Offices (Standard)	0.2252	0.1226	0.1772	0.5250
Commercial Offices (Large High Rise)	0.2136	0.1163	0.1681	0.4980
Corporate Offices	0.1262	0.0687	0.0993	0.2942
Medical Offices	0.2005	0.1092	0.1578	0.4675

3. Inter-District Student Impact

Based on October 2023 student enrollment information provided by the School District, 1,787 students reside outside of the School District boundaries, including 768 students at the elementary school level, 421 students at the middle school level and 598 students at the high school level. Many of those inter-district students attend the School District as a result of their parents or guardians being employed at businesses located within the School District boundaries. To determine the inter-district impact of new commercial/industrial development, the number of inter-district students at each school level was first divided by the estimated number of employees within the School District's area. Employment was estimated at 122,379⁷ based on data obtained from the U.S. Census Bureau. The ratio of inter-district students to estimated employment for each school level was then multiplied by the employee generation factors for each of the commercial/industrial categories as shown in Table 11. The calculation results in the Inter-District Student Impacts shown in Table 14.

TABLE 14
Inter-District Cost Impact per 1,000 Square Feet of Commercial/Industrial Development

Commercial/Industrial Category	Elementary School Cost Impact	Middle School Cost Impact	High School Cost Impact	Total Inter-District Cost Impact
Banks	0.0178	0.0096	0.0138	0.0412
Community Shopping Center	0.0097	0.0052	0.0075	0.0224
Neighborhood Shopping Center	0.0176	0.0095	0.0137	0.0408
Industrial Business Parks	0.0221	0.0120	0.0172	0.0513
Industrial Parks/ Warehousing/Manufacturing	0.0085	0.0046	0.0066	0.0197
Rental Self-Storage	0.0004	0.0002	0.0003	0.0009
Research & Development	0.0192	0.0103	0.0149	0.0444
Hospitality (Lodging)	0.0071	0.0039	0.0055	0.0165
Commercial Offices (Standard)	0.0302	0.0163	0.0235	0.0700
Commercial Offices (Large High Rise)	0.0286	0.0155	0.0223	0.0664
Corporate Offices	0.0169	0.0091	0.0132	0.0392
Medical Offices	0.0269	0.0145	0.0209	0.0623

⁷ 2020 American Community Survey 5-Year Estimates; DP03-Economic Characteristics (Civilian Employed).

4. Total Student Generation Impact

The Total Student Generation Impact is determined by adding the Student Generation Impacts shown in Table 13 to the Inter-District Impacts determined in Table 14. The Total Student Generation Impacts are listed in Table 15.

TABLE 15
Total Student Generation Impact per 1,000 Square Feet of Commercial/Industrial Development

Commercial/Industrial Category	Elementary School Cost Impact	Middle School Cost Impact	High School Cost Impact	Total Student Generation Cost Impact
Banks	0.1506	0.0819	0.1183	0.3508
Community Shopping Center	0.0818	0.0445	0.0643	0.1906
Neighborhood Shopping Center	0.1492	0.0811	0.1173	0.3476
Industrial Business Parks	0.1874	0.1020	0.1473	0.4367
Industrial Parks/ Warehousing/Manufacturing	0.0718	0.0391	0.0565	0.1674
Rental Self-Storage	0.0034	0.0019	0.0027	0.0080
Research & Development	0.1621	0.0881	0.1274	0.3776
Hospitality (Lodging)	0.0603	0.0329	0.0474	0.1406
Commercial Offices (Standard)	0.2554	0.1389	0.2007	0.5950
Commercial Offices (Large High Rise)	0.2422	0.1318	0.1904	0.5644
Corporate Offices	0.1431	0.0778	0.1125	0.3334
Medical Offices	0.2274	0.1237	0.1787	0.5298

C. NET IMPACT PER COMMERCIAL/INDUSTRIAL SQUARE FOOT

1. Cost Impact

To estimate the school facilities costs required to house new students as a result of additional commercial/industrial development, Facilities Cost Impact per Seat/Student) determined in Table 7 is multiplied by the household impacts calculated in Table 15 resulting in the total school facilities cost impact per 1,000 square feet of commercial/industrial development. The total school facilities cost impacts are shown in Table 16 by commercial/industrial development category.

TABLE 16
School Facilities Costs per 1,000 Square Feet of Commercial/Industrial Development

Commercial/Industrial Category	Elementary School Cost Impact	Middle School Cost Impact	High School Cost Impact	Total School Facilities Cost Impact
Banks	\$3,126	\$2,705	\$3,782	\$9,613
Community Shopping Center	\$1,698	\$1,470	\$2,055	\$5,223
Neighborhood Shopping Center	\$3,097	\$2,679	\$3,750	\$9,526
Industrial Business Parks	\$3,890	\$3,369	\$4,709	\$11,968
Industrial Parks/ Warehousing/Manufacturing	\$1,490	\$1,291	\$1,806	\$4,587
Rental Self-Storage	\$71	\$63	\$86	\$220
Research & Development	\$3,365	\$2,910	\$4,072	\$10,347
Hospitality (Lodging)	\$1,252	\$1,087	\$1,515	\$3,854
Commercial Offices (Standard)	\$5,302	\$4,588	\$6,416	\$16,306
Commercial Offices (Large High Rise)	\$5,028	\$4,353	\$6,086	\$15,467
Corporate Offices	\$2,971	\$2,570	\$3,596	\$9,137
Medical Offices	\$4,721	\$4,086	\$5,712	\$14,519

2. Residential Fee Offsets

The total cost impacts determined in Table 16 represent the amounts required to fully mitigate the impact on school facilities, as a result of new commercial/industrial development within the School District. Many employees as a result of new commercial/industrial development will commute from areas outside of the School District boundaries or will reside in existing homes, from which no mitigation will be received from the housing in which they reside. However, new commercial/industrial development, and thereby new employee generation, will also increase the need for new residential development to house those employees living in the School District. Applicable Residential School Fees adopted by the School District under applicable law will also be imposed by the School District on such new residential development. To prevent new commercial/industrial development from paying the portion of impact that is mitigated by the Applicable Residential School Fees, this amount has been calculated and deducted from the school facilities impact costs calculated in Table 16.

The residential fee offsets are first calculated by using the Applicable Residential School Fee of \$5.17 per square foot and multiplying that amount by the weighted average square footage of a residential unit in the School District, which is 2,085 square feet. This calculation provides the average residential revenues from a residential unit of \$10,779 (\$5.17 x 2,085). The average residential revenues from a residential unit multiplied by the Household Impacts per 1,000 square feet of commercial/industrial development, as shown in Table 12, results in the residential school fee revenues per 1,000 square feet of commercial/industrial development ("Residential Fee Offset"). This computation is shown in Table 17.

TABLE 17
Residential Fee Offsets

Commercial/Industrial Category	School District Households per 1,000 Square Feet Com./Ind.	Residential Fee per Unit	Residential Fee Offset per 1,000 Square Feet Com./Ind.
Banks	0.7270	\$10,779	\$7,837
Community Shopping Center	0.3949	\$10,779	\$4,257
Neighborhood Shopping Center	0.7201	\$10,779	\$7,762
Industrial Business Parks	0.9046	\$10,779	\$9,751
Industrial Parks/ Warehousing/Manufacturing	0.3467	\$10,779	\$3,737
Rental Self-Storage	0.0166	\$10,779	\$179
Research & Development	0.7824	\$10,779	\$8,434
Hospitality (Lodging)	0.2914	\$10,779	\$3,141
Commercial Offices (Standard)	1.2325	\$10,779	\$13,286
Commercial Offices (Large High Rise)	1.1693	\$10,779	\$12,604
Corporate Offices	0.6908	\$10,779	\$7,446
Medical Offices	1.0976	\$10,779	\$11,832

3. Net School Facilities Costs

Subtracting the Residential Fee Offset determined in Table 17 from the total school facilities costs listed in Table 16 results in the net school facilities costs per 1,000 square feet of commercial/industrial development ("Net School Facilities Costs"). The Net School Facilities Costs are listed in Table 18.

TABLE 18
Net School Facilities Costs Per 1,000 Square Feet Commercial/Industrial Development

Commercial/Industrial Category	Total School Facilities Cost Impact	Residential Fee Offset	Net School Facilities Cost Impact
Banks	\$9,613	\$7,837	\$1,776
Community Shopping Center	\$5,223	\$4,257	\$966
Neighborhood Shopping Center	\$9,526	\$7,762	\$1,764
Industrial Business Parks	\$11,968	\$9,751	\$2,217
Industrial Parks/ Warehousing/Manufacturing	\$4,587	\$3,737	\$850
Rental Self-Storage	\$220	\$179	\$41
Research & Development	\$10,347	\$8,434	\$1,913
Hospitality (Lodging)	\$3,854	\$3,141	\$713
Commercial Offices (Standard)	\$16,306	\$13,286	\$3,020
Commercial Offices (Large High Rise)	\$15,467	\$12,604	\$2,863
Corporate Offices	\$9,137	\$7,446	\$1,691
Medical Offices	\$14,519	\$11,832	\$2,687

The Net School Facilities Cost Impacts determined in Table 18 were then divided by 1,000⁸ to provide the cost impact on a square foot basis. These cost impacts are listed in Table 19.

⁸ The Employee Generation Rates derived from the SANDAG Traffic Study are estimated per 1,000 square feet of development.

TABLE 19
Net School Facilities Cost Impacts Per Square Foot of Commercial/Industrial Development

Commercial/Industrial Category	Net School Facilities Cost Impacts per Square Foot
Banks	\$1.78
Community Shopping Center	\$0.97
Neighborhood Shopping Center	\$1.76
Industrial Business Parks	\$2.22
Industrial Parks/ Warehousing/Manufacturing	\$0.85
Rental Self-Storage	\$0.04
Research & Development	\$1.91
Hospitality (Lodging)	\$0.71
Commercial Offices (Standard)	\$3.02
Commercial Offices (Large High Rise)	\$2.86
Corporate Offices	\$1.69
Medical Offices	\$2.69

The net school facilities cost impacts per commercial/industrial square shown in Table 19 are equal to or exceed the maximum authorized statutory school fee for commercial/industrial development of \$0.84 per square foot, except for the categories of Self-Storage and Hospitality/Lodging. Therefore, the School District is justified in levying school fees on commercial/industrial development in an amount up to but not exceeding the maximum authorized statutory fee, or the net cost impacts determined for the categories Industrial Rental Self-Storage or Hospitality/Lodging.

D. COMMERCIAL/INDUSTRIAL DEVELOPMENT NOT IN PRESCRIBED CATEGORIES

In cases where new commercial/industrial development does not fit within the prescribed categories shown in Table 11, the School District shall evaluate such development on a case-by-case basis to determine if the imposition of the School Fees on the development meets the nexus requirements set forth under Government Code Section 66000 et seq. The School District may levy School Fees on such development in an amount up to but not exceeding the cost per square foot impact determined through such evaluation.

E. AGE-RESTRICTED (SENIOR) HOUSING

The School District must exercise discretion in determining whether a particular project qualifies as “senior citizen housing” for the purpose of imposing developer fees. (See *California Ranch Homes Development Co. v. San Jacinto Unified School Dist.* (1993) 17 Cal.App.4th 573, 580–581.) The School District acknowledges Section 65995.1 and will levy its share of School Fees on qualifying senior citizen housing projects at the current commercial/industrial rate of \$0.84 per square foot as justified herein. The School District will require proof that such senior units are indeed restricted to seniors (i.e. a copy of the recorded CC&Rs or deed(s)) and reserves the right to revoke a Certificate of Compliance and/or require payment of difference of the amount per square foot paid to the then current amount of School Fees being levied on residential development per square foot should such Covenants, Conditions, and Restrictions (“CC&Rs”) or deed(s) be modified to allow students to reside in such the housing units. If there is any uncertainty as to whether a project qualifies as senior citizen housing or will, in fact, remain senior citizen housing beyond initial approval, the School District may wish to seek cooperation from the developer as a condition of levying the commercial/industrial School Fee rate. Such cooperation could take the form of an agreement by the developer to include a restriction in the recorded CC&Rs conditioning subsequent changes in residency requirements on the owner’s payment of applicable developer fees, and to notify the School District of changes in residency requirements and/or to provide current residency data upon School District’s request.

SECTION V. REDEVELOPMENT

Government Code Section 66001, subdivision (a)(3) and (4) requires that a school district, in imposing school-impact fees, establish a reasonable relationship between the fee's use, the need for the public facility and the type of development project on which the fee is imposed. This section addresses and sets forth general policy when considering the levy of school fees on new construction resulting from redevelopment projects within the School District.

Redevelopment means voluntarily demolishing existing residential, commercial, and/or industrial structures and subsequently replacing them with new construction ("Redevelopment"). The School District is aware of Redevelopment projects completed within the School District boundaries and anticipates similar Redevelopment projects may be completed in the next ten (10) years and beyond. School fees authorized pursuant to Education Code Section 17620 and Government Code Sections 65995 et seq. shall be levied by the School District on new construction resulting from Redevelopment projects, if there is a nexus between the School Fees being imposed and the impact of new construction on school facilities, after the impact of pre-existing development has been taken into consideration. In determining such nexus, the School District shall review, evaluate and determine on a case-by-case basis, the additional impact of the proposed new development by comparing the projected square footage, student generation and cost impacts of the proposed new units and the pre-existing residential, commercial and/or industrial development. Such analysis shall utilize the student generation rates identified in Table 3 of this Study, as applicable.

Redevelopment projects featuring a transition in commercial/industrial categorical classification (e.g. a project redeveloping a Hospitality (lodging) into Commercial office (standard) space) should be assessed based on the Applicable School Fee for the new commercial/industrial category multiplied by the total assessable space of the new commercial/industrial project in the case of a complete site redevelopment. In the case where there is a partial redevelopment, or an addition to an existing development, the Applicable School Fee should be calculated on a basis of the marginal assessable space increase multiplied by the maximum Applicable School Fee for the assessable space.

The School District may levy school fees, authorized under applicable law, on new units resulting from construction projects in an amount up to the additional impact cost per square foot as determined in accordance with the preceding paragraphs, but not exceeding the applicable school fees.

SECTION VI. GOVERNMENT CODE SECTION 66000

Government Code Sections 66000 *et seq.* were enacted by State Legislature in 1987. In any action establishing, increasing, or imposing a fee as a condition of approval of a development project, such as the Applicable School Fees described herein, these Government Code sections require the public agency to satisfy the following requirements:

1. Determine the purpose of the fee;
2. Identify the use to which the fee is to be put;
3. Determine how there is a reasonable relationship between the fee's use and the type of development project on which the fee is imposed;
4. Determine that there is a reasonable relationship between the need for the public facilities and the type of development project on which the fee is imposed;
5. Determine that there is a reasonable relationship between the amount of the fee and the cost, or portion of the cost of the public facility attributable to the development on which the fee is imposed; and
6. Provide an annual accounting of any portion of the fee remaining unspent or held for projects for more than five (5) years after collection.

The information set forth herein, including the information contained in the Appendices attached hereto, provide factual evidence establishing a nexus between the type of development projected to be built within the School District and the amount of Applicable School Fees levied upon such development based on the need for such Applicable School Fees. The determinations made in this Study meet the requirements of Government Code Section 66000. The findings are summarized as follows:

Purpose of the School Fee

The Board of the School District will levy and collect school fees on new residential and commercial/industrial development to obtain funds for the construction and/or reconstruction of school facilities to accommodate students generated as a result of such development. In accordance with Education Code Section 17620, "construction or reconstruction of school facilities" **does not** include any item of expenditure for any of the following:

- i. Regular maintenance or routine repair of school buildings and facilities;
- ii. Inspection, sampling, analysis, encapsulation or removal of asbestos-containing material, except where incidental to school facilities construction or reconstruction for which the expenditure of fees or other consideration collected pursuant to Education Code Section 17620 is not prohibited; and,
- iii. Deferred maintenance as described in Education Code Section 17582.

Identify the Use of the School Fee

The School District has determined that revenues collected from Applicable School Fees imposed on residential and commercial/industrial developments will be used for the following purposes:

- i. Construction, reconstruction and/or refurbishment of school facilities required to accommodate students generated by new residential and commercial/industrial development in areas of the School District where school facilities are needed;
- ii. Construction, reconstruction and/or refurbishment of administrative and operations facilities required in response to new student growth from new development;
- iii. Acquisition or lease of property for unhoused students generated from new development;
- iv. Purchase or lease of interim and/or temporary school facilities in order to accommodate student capacity demands;
- v. Costs associated with the administration, collection, and justification for the Applicable School Fees;
- vi. Provide local funding that may be required if the School District applies for State funding through SB 50.

Relationship between the Use of the Fee, the Need for School Facilities and the Type of Development on which the Fee is Imposed

As determined in the preceding sections, adequate school facilities do not exist to accommodate students generated from new residential and commercial/industrial development in the areas of the School District where new development is anticipated. The fees imposed on such new development will be used to finance the acquisition of property and the construction and/or reconstruction of school facilities required to accommodate student enrollment growth generated by new residential and commercial/industrial development.

Determination of the Relationship between the Fee Amount and the School Facilities Costs Attributable to Type of Development on which the Fee is Imposed

The imposition of the Applicable Residential School Fee of \$5.17 per square foot of residential development is justified as the fee is equal to or below the per square foot cost impacts to provide adequate school facilities required as a result of such new residential development.

Similarly, the imposition of the Applicable Com/Ind. School Fees of \$0.84 per square foot of commercial/industrial development is justified as the fee is equal to or below the estimated per square foot net cost impact to provide adequate school facilities required as a result of such new commercial/industrial development, except for Rental Self-Storage and Hospitality/Lodging. where a School Fee of \$0.04 and \$0.71 respectively, per square foot is justified.

Accounting Procedures for the Fees

The School District will deposit, invest, and expend the school fees imposed and collected on residential and commercial/industrial development in accordance with the provision of Government Code Section 66006.

APPENDIX A

COMMERCIAL/INDUSTRIAL DEVELOPMENT DESCRIPTIONS

Banks	Include small branch offices to regional offices used for banking. Properties under this category allow customers to conduct banking on-site.
Community Shopping Center	Shopping centers which sell merchandise and services to consumers. Include grocery stores, restaurants, retail centers, automotive sales. Community Shopping Centers have a total building square footage of 100,000 and more square feet of gross floor area
Neighborhood Shopping Center	Shopping centers which sell merchandise and services to consumers. Include grocery stores, restaurants, retail centers, automotive sales. Neighborhood Shopping Centers have a total building square footage of less than 100,000 square feet of gross floor area.
Industrial Business Parks	Include any combination of facilities engaged in manufacturing/assembly, warehousing, and/or storage with 15% or more of the total area designated for commercial use.
Industrial Parks/ Warehousing/Manufacturing	Include any combination of facilities engaged in manufacturing/assembly, warehousing, and/or storage with limited or no commercial use (less than 15% of the total area designated for commercial use).
Rental Self-Storage	Include warehouse developments which rent small storage vaults and often termed "mini-storage".
Research & Development	Include scientific research and development laboratories, office and/or their supporting facilities.
Hospitality (Lodging)	Include establishments which provide lodging to the general public. Lodging types include hotels, motels, resort hotels and inns. The maximum term of occupancy for establishment within this category shall not exceed 30 days.
Commercial Offices (Standard) ¹	Include general office space occupying less than 100,000 square feet with multiple tenants.
Commercial Offices (Large High Rise) ¹	Include general office space occupying 100,000 square feet and greater with multiple tenants.
Corporate Offices	An office or office building with a single tenant.
Medical Offices	Include medical offices that serve a wide range of medical needs and may include a pharmacy. Medical offices are generally operated by one or more physicians.

¹ Office space used for activities described under banks, research and development, or medical offices should be classified under those categories.

APPENDIX B FACILITIES CAPACITY UPDATE

Classroom Inventory/Building Capacity

	Site Name	Portable Classrooms	Permanent Classrooms	Total Classrooms	Special Use Classrooms	General Education Classrooms
Elementary	Adams Elementary	0	22	22	3	19
	Alcott Elementary	0	30	30	3	27
	Beatty Elementary	0	25	25	2	23
	Bryant Elementary	0	14	14	0	14
	Castle View Elementary	12	18	30	2	28
	Emerson Elementary	1	26	27	3	24
	Franklin Elementary	8	25	33	3	30
	Fremont Elementary	0	28	28	4	24
	Harrison Elementary	2	26	28	2	26
	Hawthorne Elementary	1	28	29	4	25
	Highgrove Elementary	6	27	33	2	31
	Highland Elementary	6	27	33	4	29
	Jackson Elementary	2	28	30	4	26
	Jefferson Elementary	0	37	37	0	37
	Kennedy Elementary	3	36	39	2	37
	Lake Mathews Elementary	13	18	31	0	31
	Liberty Elementary	0	26	26	0	26
	Longfellow Elementary	0	34	34	0	34
	Madison Elementary	6	20	26	3	23
	Magnolia Elementary	2	20	22	0	22
	Monroe Elementary	0	28	28	3	25
	Mt. View Elementary	3	34	37	2	35
	Pachappa Elementary	0	28	28	2	26
	Rivera Elementary	12	17	29	3	26
	Taft Elementary	0	26	26	3	23
	Twain Elementary	0	39	39	0	39
	Victoria Elementary	6	18	24	4	20
	Washington Elementary	11	23	34	2	32
	Woodcrest Elementary	1	27	28	2	26
	Elementary School Totals	95	755	850	62	788

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	Site Name	Portable Classrooms	Permanent Classrooms	Total Classrooms	Special Use Classrooms	General Education Classrooms
Middle	Central Middle	0	25	25	3	22
	Chemawa Middle	3	36	39	5	34
	Earhart Middle	13	42	55	4	51
	Gage Middle	0	39	39	4	35
	Sierra Middle	0	53	53	13	40
	Frank Augustus Miller Middle	0	34	34	4	30
	University Middle	12	19	31	6	25
	Middle School (7-8) Totals	28	248	276	39	237
High	Arlington High	18	59	77	13	64
	King High	29	86	115	12	103
	Lincoln High	0	13	13	5	8
	North High	30	62	92	7	85
	Poly High	26	73	99	8	91
	Ramona High	12	74	86	14	72
	High School (9-12) Totals	115	367	482	59	423
	Total (TK-12)	238	1,370	1,608	160	1,448

Classroom Inventory

Description	General Education			Special Education	Total
	TK-6	7-8	9-12		
I. Total Classroom Inventory	788	237	423	160	1,608
II. Permanent Classrooms	700	213	322	135	1,370
III. Portable Classrooms					238
IV. 25% of Permanent Classrooms					343
V. Adjustment (III. Minus IV.)	0	0	0	0	0
IV. Eligible Classrooms (I. minus V.)	788	237	423	160	1,608
Loading Factor per Classroom ¹	x25	x27	x27	x13	N/A
Building Capacity	19,700	6,399	11,421	2,080	39,600

1. Per Education Code Section 17071.10, school capacities are determined based on loading factors of 25 students per classroom for grades transitional kindergarten through 6, 27 students per classroom for grades 7 through 12. Also per OPSC, capacity is loaded at 13 students per classroom for special day classes and 25 students per classroom for non-instructional classrooms.

Building Capacity by School Level

Description	TK-6	7-8	9-12	Total
General Education	19,700	6,399	11,421	37,520
Proration of Special Education	1,092	355	633	2,080
Total	20,792	6,754	12,054	39,600

APPENDIX C ENROLLMENT SUMMARY

School Name/Program	Elementary							Middle		High				Grand Total
	TK/K	1	2	3	4	5	6	7	8	9	10	11	12	
Adams Elementary	74	75	55	71	78	56	70	-	-	-	-	-	-	479
Alcott Elementary	101	93	90	90	102	89	97	-	-	-	-	-	-	662
Beatty Elementary	92	64	76	56	61	62	70	-	-	-	-	-	-	481
Bryant Elementary	69	41	47	47	57	41	49	-	-	-	-	-	-	351
Castle View Elementary	122	92	103	87	93	96	75	-	-	-	-	-	-	668
Emerson Elementary	126	93	98	87	95	70	89	-	-	-	-	-	-	658
Franklin Elementary	122	101	107	135	112	125	97	-	-	-	-	-	-	799
Fremont Elementary	102	96	90	91	65	89	76	-	-	-	-	-	-	609
Harrison Elementary	105	74	76	66	79	70	79	-	-	-	-	-	-	549
Hawthorne Elementary	109	93	76	91	90	92	97	-	-	-	-	-	-	648
Highgrove Elementary	153	100	116	106	117	123	111	-	-	-	-	-	-	826
Highland Elementary	119	105	82	91	83	92	98	-	-	-	-	-	-	670
Jackson Elementary	128	84	91	86	107	95	99	-	-	-	-	-	-	690
Jefferson Elementary	147	128	136	112	125	134	134	-	-	-	-	-	-	916
Kennedy Elementary	155	114	110	120	140	124	120	-	-	-	-	-	-	883
Lake Mathews Elementary	112	107	90	120	109	105	126	-	-	-	-	-	-	769
Liberty Elementary	114	82	103	63	88	91	90	-	-	-	-	-	-	631
Longfellow Elementary	125	119	82	103	100	85	85	-	-	-	-	-	-	699
Madison Elementary	96	77	113	80	87	83	92	-	-	-	-	-	-	628
Magnolia Elementary	99	74	68	74	76	80	74	-	-	-	-	-	-	545
Monroe Elementary	101	63	86	75	93	83	78	-	-	-	-	-	-	579
Mt. View Elementary	136	116	112	121	123	114	108	-	-	-	-	-	-	830
Pachappa Elementary	144	82	101	102	81	77	95	-	-	-	-	-	-	682
Rivera Elementary	107	86	136	85	106	96	80	-	-	-	-	-	-	696
Taft Elementary	110	74	86	96	73	82	76	-	-	-	-	-	-	597
Twain Elementary	144	128	162	160	143	146	156	-	-	-	-	-	-	1,039
Victoria Elementary	94	66	72	64	55	57	72	-	-	-	-	-	-	480
Washington Elementary	139	112	136	104	107	94	120	-	-	-	-	-	-	812
Woodcrest Elementary	101	87	80	85	86	114	103	-	-	-	-	-	-	656

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School Name/Program	Elementary							Middle		High				Grand Total
	TK/K	1	2	3	4	5	6	7	8	9	10	11	12	
Riverside STEM Academy		-	-	-	-	102	105	105	105	-	-	-	-	417
Central Middle		-	-	-	-	-	-	335	275	-	-	-	-	610
Chemawa Middle		-	-	-	-	-	-	449	412	-	-	-	-	861
Earhart Middle		-	-	-	-	-	-	371	400	-	-	-	-	771
Frank Augustus Miller Middle		-	-	-	-	-	-	434	408	-	-	-	-	842
Gage Middle		-	-	-	-	-	-	443	417	-	-	-	-	860
Sierra Middle		-	-	-	-	-	-	409	426	-	-	-	-	835
University Middle		-	-	-	-	-	-	431	402	-	-	-	-	833
Arlington High		-	-	-	-	-	-	-	-	495	525	512	439	1,971
King High		-	-	-	-	-	-	-	-	685	740	684	708	2,817
Lincoln High		-	-	-	-	-	-	-	-	-	-	18	154	172
North High		-	-	-	-	-	-	-	-	508	546	545	489	2,088
Poly High		-	-	-	-	-	-	-	-	706	716	646	571	2,639
Raincross High		-	-	-	-	-	-	-	-	-	-	11	240	251
Ramona High		-	-	-	-	-	-	-	-	528	556	562	543	2,189
Riverside STEM High School		-	-	-	-	-	-	-	-	71	61	55	55	242
Special Education			2		1	3		2	2	1	1	4	12	28
EOC Summit Independent Study	3	1	5	5	8	2	3	2	4	4	10	13	26	86
EOC/COPE								1	3	11	19	15	1	50
Grand Total	3,349	2,627	2,787	2,673	2,740	2,772	2,824	2,982	2,854	3,009	3,174	3,065	3,238	38,094
Total By School Level	19,772							5,836		12,486				38,094

Source: School District

APPENDIX D

DISTRICT-WIDE STUDENT GENERATION RATES

Student Generation Rates (“SGRs”) used in this Study are based on student enrollment address information from the School District, as of October 2023.

The student enrollment address information was matched to the address (situs) information from the property characteristic/GIS data. The number of students matched was then queried by school level and residential category. Students could not be matched if they were inter-district or if they did not have a valid physical address (e.g. only P.O. Box was listed). Mobile homes are not considered in the SGR determination, and therefore have been omitted. The determination of the SGRs is summarized in Tables D-1 through D-4.

TABLE D-1
Student Generation Rates

School Level	SFD Units	SFA Units	MF Units
Elementary School (TK-6)	0.2264	0.0632	0.1159
Middle School (7-8)	0.1240	0.0334	0.0622
High School (9-12)	0.1841	0.0527	0.0823
Total	0.5345	0.1493	0.2604

The student generation rates for each residential category listed in Table D-1 were blended into a single student generation rate for each school level based on the percentage allocation of Projected Units. The percentage allocations are shown in Table D-2.

TABLE D-2
Single Family Detached (SFD) Student Generation Rates

School Level	No. of Students Matched	Total Units ¹	Student Generation Rate
Elementary School (TK-6)	12,147	53,660	0.2264
Middle School (7-8)	6,656	53,660	0.1240
High School (9-12)	9,877	53,660	0.1841
Total	28,680	NA	0.5345

¹ Obtained from the U.S. Census Bureau’s 2022 American Community Survey 5-Year Estimates

TABLE D-3
Single Family Attached (SFA) Student Generation Rates

School Level	No. of Students Matched	Total Units ¹	Student Generation Rate
Elementary School (TK-6)	223	3,530	0.0632
Middle School (7-8)	118	3,530	0.0334
High School (9-12)	186	3,530	0.0527
Total	527	NA	0.1493

¹ Obtained from the U.S. Census Bureau’s 2022 American Community Survey 5-Year Estimates

TABLE D-4
Multi-Family (MF) Student Generation Rates

School Level	No. of Students Matched	Total Units ¹	Student Generation Rate
Elementary School (TK-6)	2,452	21,151	0.1159
Middle School (7-8)	1,315	21,151	0.0622
High School (9-12)	1,740	21,151	0.0823
Total	5,507	NA	0.2604

¹ Obtained from the U.S. Census Bureau's 2022 American Community Survey 5-Year Estimates

TABLE D-5
Allocation of Unmitigated Projected Units by Residential Category

Residential Category	Unmitigated Projected Units	Percentage Allocation
SFD	925	60.42%
SFA	0	0.00%
MF	606	39.58%
Total	1,531	100.00%

The Blended Student Generation Rates were determined by applying the percentage allocations, in Table D-4 by the Student Generation Rates shown in Table D-1, the results of which are shown in Table D-5.

TABLE D-5
Blended Student Generation Rates

School Level	Blended Student Generation Rate
Elementary School (TK-6)	0.1827
Middle School (7-8)	0.0995
High School (9-12)	0.1438
Total	0.4260