# School Facilities Needs Analysis

San Ysidro School District

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## Executive Summary

This School Facilities Needs Analysis ("Analysis") has been prepared in accordance with applicable laws to provide the factual basis for the San Ysidro School District ("School District") to consider and, if desired, adopt alternative school facility fees ("Alternative Fees") that may be collected from residential development in the School District consistent with Section 17620 of the Education Code and Sections 65995.5, 65995.6, and 65995.7 of the Government Code (future code section references are to the Government Code unless otherwise specified). The Analysis provides factual information as to the following three (3) elements:

(i) Determination by the State Allocation Board ("SAB") of eligibility to receive funds from the State of California ("State") for new school facility construction;
(ii) Designation by the School District of satisfying two (2) of the four (4) statutory school requirements ("Statutory Requirements") set forth in Section 65995.5(b)(3); and
(iii) Calculation of the amount of the permissible Alternative Fees authorized by Section 65995.5 ("Alternative No. 2 Fee") and by Section 65995.7 ("Alternative No. 3 Fee").

### A. Eligibility for New Construction Funding from the State

The School District has taken action electing to participate in the new School Facilities Program ("SFP") established by Section 17070.10 of the Education Code and authorized a designated representative to (i) approve, certify, and submit the SAB Forms 50-01, 50-02, and 50-03 to the SAB and (ii) request an eligibility determination ("Eligibility Determination") for new construction funding as required by the SFP.

**As shown in Exhibits A, B, C, and D, the School District is eligible to receive new construction funding under the SFP.**

### B. Compliance with Statutory Requirements

A review of the records of the School District was accomplished to ascertain if the School District satisfies at least two (2) of the Statutory Requirements. Table ES-1 summarizes the Statutory Requirements and identifies those satisfied by the School District as of the date hereof.

**Table ES-1**
**Summary of Statutory Requirements**

| Statutory Requirements | Status |
|---|---|
| Substantial enrollment as defined in Section 65995.5(b)(3)(A) of its students on a multi-track year-round calendar | **Not Met** |
| Placed at least one (1) general obligation ("GO") bond measure on the ballot in the last four (4) years, and the measure received at least 50 percent plus one (1) of the votes cast | **Not Met** |
| Issued debt or incurred obligations for capital outlay in an amount equivalent to the percentage of its bonding capacity specified in Section 65995.5(b)(3)(C) | **Met** |
| At least 20 percent of the teaching stations are relocatable classrooms | **Met** |

## C. Calculation of Alternative No. 2 Fee and Alternative No. 3 Fee

The facts set forth herein justify on a roughly proportional and a reasonably related basis that the following amounts meet the requirements of Sections 66000 *et seq.*, as well as other applicable legal requirements, including but not limited to Sections 65995.5, 65995.6 and 65995.7. The Alternative No. 2 Fee and Alternative No. 3 Fee for the School District are listed in Table ES-2.

**Table ES-2**
**Alternative Fees (2012$)**

| Fee | Amount per Square Foot |
|---|---|
| Alternative No. 2 Fee | $2.79 |
| Alternative No. 3 Fee | $5.79 |

Attached as Exhibit E is (i) a summary of the school facility planning policies of the School District and (ii) an estimate of the school facilities cost impacts per square foot of residential construction. As can be seen from comparing Exhibit E to the recommended Alternative No. 2 Fee and the Alternative No. 3 Fee in Table ES-2, the Alternative Fees are less than the comparable amounts set forth in Exhibit E and are not sufficient to cover all of the actual school facilities cost impacts caused by new residential development on the School District. Therefore, the Alternative No. 2 Fees and the Alternative No. 3 Fees are reasonably related and roughly proportional to the cost of school facilities for the future development identified in the Analysis in accordance with applicable laws.

## D. Imposition of Alternative No. 2 Fee and Alternative No. 3 Fee

Prior to the adoption of the Analysis, the public is given a 30-day period to review and comment on the Analysis, and any written comments received by the Governing Board of the School District must be responded to in writing. The Governing Board is also required to hold a public hearing prior to its consideration of the Analysis.

Should the Governing Board of the School District approve the resolution that adopts the Analysis and the accompanying Alternative No. 2 Fee and Alternative No. 3 Fee, those amounts would be effective immediately for a period not to exceed 12 months. By approving the Analysis and the accompanying Alternative Fees, the Governing Board is authorizing the imposition of the Alternative No. 2 Fee for those periods when the State has new construction bond funds available and the Alternative No. 3 Fee for those periods when the SAB is no longer approving apportionments for new construction due to a lack of funds available and the conditions in Section 65995.7 have been met.

# I. General

Upon adoption of Alternative Fees by a school district, such Alternative Fees may be required in accordance with applicable law. It is anticipated that such adoption will specify that Alternative No. 2 Fees will be required as provided in Section 65995.5(a) if the SAB is approving apportionments for new construction funding, and Alternative No. 3 Fees will be required as provided in Section 65995.7(a), if the SAB is not approving apportionments for new construction funding, and subject to the suspension of Alternative No. 3 Fees as set forth in Section 65995.7(a)(2).

The Analysis is divided into seven (7) main sections.

» Section I is the introductory section that generally describes the methodology used in preparing the Analysis.

» Section II describes the Eligibility Determination that has been obtained from the SAB, as well as documents which of the four (4) Statutory Requirements the School District presently satisfies.

» Section III projects the unhoused students to be generated by residential development anticipated to occur in the School District over the next five (5) years ("Future Units") in accordance with Section 65995.6(a).

» Section IV identifies any surplus school sites or existing surplus local funds that the School District might elect in whole or part to use to reduce the impact of the Future Units on the School District.

» Section V of the Analysis sets forth the recommended amount of the Alternative No. 2 Fee.

» Section VI of the Analysis sets forth the recommended amount of the Alternative No. 3 Fee.

» Finally, Section VII documents facts whereby the School District may make determinations regarding compliance of the Alternative Fees with Sections 66000 *et seq.*

**Eligibility to Collect Alternative Fees**

Eligibility to Receive State Funds

A school district must have been determined by the SAB to be eligible for new construction funding under the SFP or requested such a determination from the SAB 120 days prior to adopting any Alternative Fees.

Statutory Requirements

A school district must satisfy at least two (2) of the four (4) Statutory Requirements in order to adopt and impose Alternative Fees. The Statutory Requirements are summarized as follows:

1. A school district has a substantial enrollment, as defined in Section 65995.5(b)(3)(A) ("Substantial Enrollment") of its students on a multi-track year-round calendar;

2. A school district has placed at least one (1) GO bond measure on the ballot in the last four (4) years, and the measure received at least 50 percent plus one (1) of the votes cast;

3. A school district has issued debt or incurred obligations for capital outlay in an amount equivalent to a certain percentage of its bonding capacity; and/or

4. At least 20 percent of the teaching stations within a school district are relocatable classrooms.

**Projected Unhoused Students from Future Residential Development**

Total Projected Student Enrollment

In determining the amount of any proposed Alternative Fees, a school district must project in accordance with Section 65995.6 the total number of students to be generated by Future Units ("Projected Student Enrollment"). This projection is performed by applying the student generation rates for residential development over the previous five (5) years of a type similar to that of the Future Units either in the school district or in the city or the county in which the school district is located. The projection may be modified by relevant planning agency information.

Excess Capacity

A school district must identify and consider the number of excess seats, if any, which are available at each school level (i.e., elementary school and middle school). If surplus seats exist at one (1) or more school levels, the school district must determine what portion of the excess seats, if any, it desires to make available to accommodate the Projected Student Enrollment. The determination may include such considerations as matriculation of existing students, advance funding from future residential units, long term needs of the school district, as well as other relevant factors. Excess seats shall be determined by comparing capacity as calculated pursuant to Section 17071.25 of the Education Code to student enrollment.

Projected Unhoused Students

Lastly, a school district must reduce the Projected Student Enrollment by the excess capacity, if any, that is identified and allocated by the school district to the Future Units to calculate the number of projected unhoused students ("Projected Unhoused Students").

**Surplus Property and Existing Surplus Local Funds**

Surplus Property

A school district must identify and make a reasonable allocation of surplus property, if any, which could be (i) used as a school site and/or (ii) sold to finance additional school facilities needed to accommodate the Projected Unhoused Students.

Existing Surplus Local Funds

A school district must identify and make a reasonable allocation of existing surplus local sources, including local funds, which includes commercial/industrial school fees ("Local Funds"), if any, that could be available to finance the construction of school facilities needed to accommodate the Projected Unhoused Students as referred to in Section 65995.5(c)(2) and 65995.6(b)(3).

## Alternative No. 2 Fee

Student Capacity and Site Size of Future School Facilities

A school district must determine the appropriate number of students to be housed at each school level. Pursuant to Section 65995.5(h), after this determination has been made, the school district must calculate the appropriate site size for each school level based on the "School Site Analysis and Development Handbook" published by the State Department of Education as that handbook read as of January 1, 1998.

Site Acquisition and Site Development Costs

A school district must establish a factual basis for the estimated cost of acquiring property(s) for a school site(s) or the appraised value of a proposed school site(s). Additionally, the school district must establish an estimate of the permissible cost of developing such site(s). The site development cost includes utilities, off-site, and service site development costs.

Total School Facility Costs per Student and Total School Facility Costs

A school district must estimate the total school facility costs per student based on the site acquisition and the site development costs mentioned above, as well as the amounts specified in Section 65995.5, which may or may not be adequate to fund the necessary school facilities. Thereafter, the total school facility costs must be calculated. This calculation involves multiplying the number of Projected Unhoused Students by the school facility costs per student set forth in Section 65995.5 and subtracting any available local sources, including Local Funds, identified by the school district and dedicated to such portion of future development in the school district.

Residential Square Footage to be Constructed during the Next Five (5) Years

Based on information from the county, the city(s) or one (1) or more independent third party market reports, a school district must estimate the total assessable square footage of the Future Units.

Alternative No. 2 Fee

A school district must calculate the Alternative No. 2 Fee by dividing the total school facility costs by the total assessable square footage of the Future Units in accordance with Section 65995.5(c).

## Alternative No. 3 Fee

Alternative No. 3 Fee

The Alternative No. 3 Fee is determined by increasing the Alternative No. 2 Fee by an amount that may not exceed the amount calculated pursuant to Section 65995.5(c), provided that the calculation of such amount excludes reductions for available local sources, including Local Funds, identified and dedicated in accordance with Section 65995.7(a).

## II. Eligibility to Collect Alternative Fees

Section 65995.5 requires that a school district (i) be eligible for new construction funding under the SFP and (ii) satisfy at least two (2) of the Statutory Requirements to be eligible to impose an Alternative No. 2 Fee or an Alternative No. 3 Fee. Section II.A provides an evaluation of the eligibility of the School District for new construction funding under the SFP and Section II.B documents the School District's satisfaction of at least two (2) Statutory Requirements.

### A. Eligibility to Receive State Funds

The School District has taken action electing to participate in the School Facilities Program ("SFP") established by Section 17070.10 of the Education Code. Additionally, the School District authorized a designated representative to (i) approve, certify, and submit the SAB Forms 50-01, 50-02, and 50-03 to the SAB and (ii) request an eligibility determination ("Eligibility Determination") for new construction funding as required by the SFP. The School District filed SAB Forms 50-01, 50-02, and 50-03 and requested an Eligibility Determination for new construction funding as required by the SFP on January 25, 2000. On February 23, 2000, the Eligibility Determination of the School District was approved by the SAB. Subsequently, the School District submitted updated SAB Forms 50-01, 50-02, and 50-03 as part of its ongoing facilities planning and financing program. The most current SAB Forms 50-01, 50-02, and 50-03 are incorporated herein as Exhibits A, B, and C, respectively. As shown in the School District's most current Eligibility Determination from the SAB (attached and incorporated as Exhibit D), the School District is eligible for new construction funding under the SFP for 472 students in grades kindergarten through 6 and 125 students in grades 7 and 8, 233 non-severe special day class students, and zero (0) severe special day class students.

### B. Statutory Requirements

As stated in Section I, a school district must satisfy at least two (2) of the four (4) Statutory Requirements in order to levy Alternative Fees. What follows are facts establishing that the School District satisfies at least two (2) of the Statutory Requirements.

#### 1. <u>Substantial Enrollment on Multi-track Year-Round Schedule</u>

This Statutory Requirement is met if the school district has Substantial Enrollment on a multi-track year-round schedule. Substantial Enrollment is defined differently for different types of school districts, as follows:

a. *Unified School Districts and Elementary School Districts*. At least 30 percent of the school district's students in grades kindergarten through 6 are on a multi-track year-round schedule in the high school attendance area in which all or some of the new residential units identified in the Analysis are planned for construction.

b. *High School Districts.* (i) At least 30 percent of the high school district's students are on a multi-track year-round schedule, or (ii) at least 40 percent of the students in grades kindergarten through 12 within the boundaries of the high school attendance area in which all or some of the new residential units identified in the Analysis are planned for construction are on a multi-track year-round schedule.

**The School District has determined this Statutory Requirement has not been satisfied.**

**2. General Obligation Bond Measure**

This Statutory Requirement is met if the school district has placed a GO bond measure on the ballot in the last four (4) years and received at least 50 percent plus one (1) of the votes cast on one (1) such measure.

**The School District has determined this Statutory Requirement has not been satisfied.**

**3. Debt or Obligations for Capital Outlay**

This Statutory Requirement is met if the school district has issued debt or incurred obligations for capital outlay in an amount equivalent to a specified percent of its local bonding capacity. If the debt does not include debt associated with a Mello-Roos Community Facilities District ("CFD") formed by a landowner election after November 4, 1998, the threshold is 15 percent. If the debt includes debt associated with a Mello-Roos CFD formed by a landowner election after November 4, 1998, the threshold is increased to 30 percent. All debt and obligations to be repaid from property taxes, parcel taxes, special taxes, and the school district's general fund may be included.

**The School District has determined this Statutory Requirement has been satisfied. The School District currently has $142,686,442 in outstanding debt. This outstanding debt consists of $41,409,714 in Certificates of Participation ("COPs"), and $101,276,728 in GO bonds issued by the School District. This debt represents 140.44 percent of the School District's bonding capacity (see Exhibit F for a calculation of the School District's bonding capacity).**

**4. Relocatable Classrooms**

This Statutory Requirement is met if at least 20 percent of the school district's teaching stations are relocatable classrooms.

**The School District has determined this Statutory Requirement has been satisfied. The School District currently has a total of 228 permanent classrooms and 68 relocatable classrooms. This equates to a 22.97 percent relocatable classroom utilization rate.**

## C. Eligibility to Collect Alternative Fees

As determined above, the School District is eligible to receive new construction funding and currently satisfies at least two (2) of the four (4) Statutory Requirements. As a result, the School District is eligible to adopt and impose Alternative Fees as provided by applicable law.

# III. Projected Unhoused Students from Residential Development over the Next Five Years

Section 65995.6(a) requires that the School District determine the need for new school facilities for the Projected Unhoused Students. The calculation of the Projected Unhoused Students shall be based on historical student generation rates ("SGRs") of new residential units constructed during the previous five (5) years of a type similar to that of the Future Units. Section III.A below calculates the Projected Student Enrollment. Section III.B sets forth the relevant facts as to the identification of any excess seats which might be considered by the School District as available at each school level to house the Projected Student Enrollment, as determined in Section III.A. Finally, Section III.C calculates the Projected Unhoused Students.

## A. Projected Student Enrollment

As stated above, Section 65995.6(a) specifies the methodology the School District must use to calculate the Projected Student Enrollment. What follows is a step-by-step description of this calculation.

### 1. Student Generation Rates

In order to calculate SGRs in accordance with Section 65995.6(a), the School District must identify residential units that (i) were constructed during the previous five (5) years and (ii) are representative of the Future Units. Residential data pertaining to the School District was obtained by Dolinka Group, LLC from the Office of the Assessor ("Assessor") of the County of San Diego ("County"). Using data from the Assessor of the County and the School District, Dolinka Group compiled a database from such information containing the addresses of the units that met the criteria listed above. Parcels in the database were then classified by housing type (i.e., single family detached, single family attached, and multifamily).

- Residential units classified as single family detached ("SFD") are defined as units with no common walls each assigned a unique Assessor's parcel number.

- The category of single family attached ("SFA") consists of units with common walls each assigned a unique Assessor's parcel number (e.g., townhomes, condominiums, etc.).

- The third type of residential unit, multifamily ("MF"), is defined as a unit with common walls on an Assessor's parcel on which other units are located.

A total of 139 SFD units in the School District were identified as meeting the criteria stated above. Dolinka Group then obtained a database of all students within the School District at the beginning of school year 2011/2012. Upon comparison of the two (2) databases, 93 students were matched to the 139 SFD units, resulting in the following SGRs for SFD units shown in Table 1.

**Table 1**
**Student Generation Rates for Single Family Detached Units**

| School Level | Number of Students Matched | Number of SFD Units | Student Generation Rates |
|---|---|---|---|
| Elementary School (Grades K-6) | 74 | 139 | 0.5324 |
| Middle School (Grades 7-8) | 19 | 139 | 0.1367 |
| **Total** | **93** | **N/A** | **0.6691** |

A process identical to the one described above for SFD units was used to determine SGRs for MF units. Dolinka Group examined MF units constructed over the previous five (5) years and determined that a total of 694 units meet the criteria stated above. A comparison of these units to the student database revealed a total match of 228 students. Table 2 below shows a summary of the calculation of the SGRs for SFA units.

**Table 2**
**Student Generation Rates for Multifamily Units**

| School Level | Number of Students Matched | Number of MF Units | Student Generation Rates |
|---|---|---|---|
| Elementary School | 174 | 694 | 0.2507 |
| Middle School | 54 | 694 | 0.0778 |
| **Total** | **228** | **N/A** | **0.3285** |

As for SFA units, Dolinka Group determined that there were an insufficient number of units built over the past five (5) years to calculate SGRs that would be representative of the residential development expected to occur within the School District over the next five (5) years. Since the construction of SFA units is expected to occur within the School District over the next five (5) years, the Analysis has employed the portion of Section 65995.6(a) that permits a school district to use SGRs of new residential units constructed over the previous five (5) years that are asimilar type of unit to those anticipated to be constructed in either the city or county in which the school district is located. The Analysis uses the SGRs for SFA units that have been experienced and documented for grades K through 6 by Chula Vista Elementary School District ("CVESD") as well as for grades 7 and 8 by Sweetwater Union High School District ("SUHSD"). Table 3 shows the SGRs for SFA units by grade level.

**Table 3**
**Student Generation Rates for Single Family Attached Units**

| School Level | SFA Student Generation Rates |
|---|---|
| Elementary School[1] | 0.2734 |
| Middle School[2] | 0.0277 |
| **Total** | **0.3011** |

[1] Source: Analysis for CVESD dated June 2011.
[2] Source: Analysis for SUHSD dated March 2011.

## 2. Future Units

In order to obtain information regarding future residential units, the Planning Departments of the City of San Diego ("City") and the County were contacted (please refer to the map on the following page for a geographic profile of the School District). Based on correspondence from the City and the County (see Exhibit G), Dolinka Group has determined that the School District could experience the construction of 1,515 Future Units over the next five (5) years. Of these 1,515 Future Units, 394 units have already mitigated their impact on the School District through participation in one of the three (3) CFDs located throughout the School District. Table 4 distinguishes between Future Units by unit type.

**Table 4**
**Future Units by Unit Type**

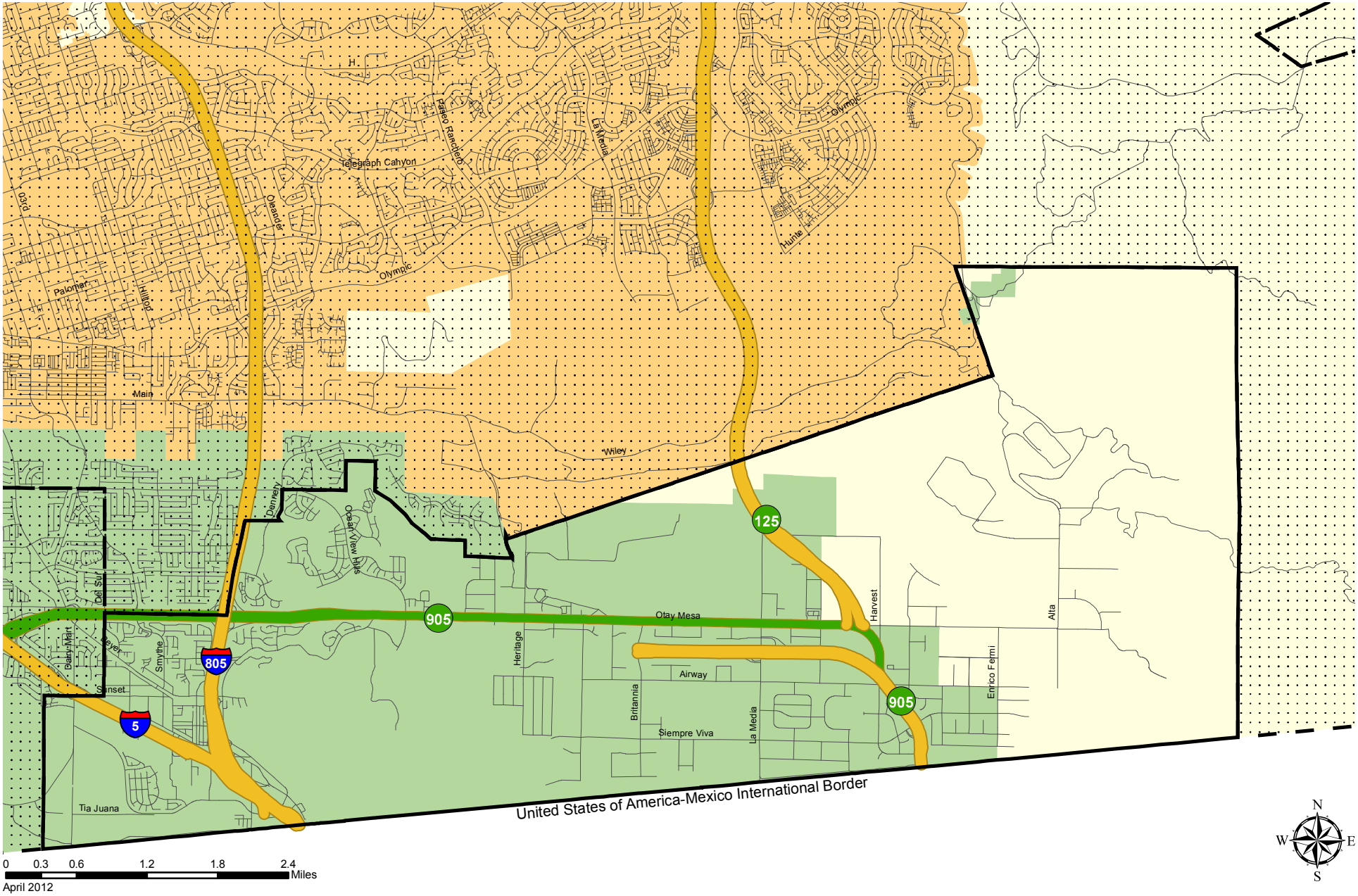
| Unit Type | Mitigated Future Units | Non-Mitigated Future Units | Total Future Units |
|---|---|---|---|
| Single Family Detached | 0 | 350 | 350 |
| Single Family Attached | 0 | 425 | 425 |
| Multifamily | 394 | 346 | 740 |
| **Total Units** | **394** | **1,121** | **1,515** |

The projected number of non-mitigated future residential units identified in Table 4 includes units which may result from residential units that are voluntarily demolished in order to be replaced by new residential development ("Reconstruction"). For additional information regarding the facilities cost impacts of Reconstruction please refer to Exhibit H.

It should be noted these projections are based on the best available information at this time and are independent of the projected residential development reported to the State in SAB Form 50-01.

# San Ysidro School District

## Geographic Profile - School Year 2011/2012




April 2012

DOLINKA GROUP

### 3. Projected Student Enrollment

To calculate the Projected Student Enrollment, the number of Future SFD units, Future SFA units, and Future MF units listed in Table 4 were multiplied by the SGRs shown in Tables 1, 2, and 3. The results of this operation are shown in Table 5.

**Table 5**
**Projected Student Enrollment**

| School Level | Students Generated from Mitigated Future Units | Students Generated from Non-Mitigated Future Units | Total Projected Students from Future Units |
|---|---|---|---|
| Elementary School | 99 | 389 | 488 |
| Middle School | 31 | 87 | 118 |
| **Total** | **130** | **476** | **606** |

## B. Current Capacity

Collectively, the School District's school facilities in school year 2011/2012 have a capacity of 6,064 seats per Section 17071.10 of the Education Code. Of these 6,064 seats, 4,702 are at the elementary school level and 1,362 are at the middle school level (the School District's school level configuration in this comparison has been altered to be consistent with SAB Form 50-02). These capacities include seats from all new school facility construction projects funded by the State. Based on student enrollment data for school year 2011/2012, the enrollment of the School District is 5,270 students. As shown in Table 6, facilities capacity exceeds student enrollment at both school levels in school year 2011/2012.

**Table 6**
**Existing School Facilities Capacity and Student Enrollment**

| School Level [1] | 2011/2012 Facilities Capacity [2] | 2011/2012 Student Enrollment [3] | Excess/ (Shortage) Capacity |
|---|---|---|---|
| Elementary School | 4,702 | 4,093 | 609 |
| Middle School | 1,362 | 1,177 | 185 |
| **Total** | **6,064** | **5,270** | **794** |

[1] The School District's school level configuration has been altered in this section to be consistent with SAB Form 50-02.
[2] See Exhibit B for SAB Form 50-02, and Exhibit J for the Updated School Facilities Capacity Calculation.
[3] Student enrollment provided by the School District.

## C. Projected Unhoused Students

The School District will experience growth beyond the next five (5) years. Therefore, the surplus seats identified in Table 6 must be allocated between the Future Units shown in Table 4 and residential units to be constructed beyond the next five (5) years. According to information obtained from the San Diego Association of Governments ("SANDAG"), the School District can expect an additional 11,716 residential units to be constructed through calendar year 2040. This number includes Future Units and residential units to be constructed beyond the next five (5) years. Allocating the surplus seats identified in Table 6 between Future Units and residential units to be constructed beyond the next five (5) years based on the number of students each group of units is expected to generate results in 86 surplus seats at the elementary school level and 26 surplus seats at the middle school level to be allocated over the next five (5) years.

Additionally, the surplus seats to be allocated over the next five (5) years must be apportioned between students generated from mitigated and non-mitigated Future Units (Table 5). Of the allocated surplus seats identified above, it was determined that 69 surplus seats at the elementary school level and 19 surplus seats at the middle school level are available to house students generated from non-mitigated Future Units. Tables 7 and 8 show the Projected Unhoused Students from mitigated and non-mitigated Future Units at each school level, while Exhibit J provides more information regarding the allocation of surplus seats.

**Table 7**
**Projected Unhoused Students from Mitigated Future Units**

| School Level | Projected Student Enrollment | Surplus Seat Determination | Projected Unhoused Students |
|---|---|---|---|
| Elementary School | 99 | 17 | 82 |
| Middle School | 31 | 7 | 24 |
| **Total** | **130** | **24** | **106** |

**Table 8**
**Projected Unhoused Students from Non-Mitigated Future Units**

| School Level | Projected Student Enrollment | Surplus Seat Determination | Projected Unhoused Students |
|---|---|---|---|
| Elementary School | 389 | 69 | 320 |
| Middle School | 87 | 19 | 68 |
| **Total** | **476** | **88** | **388** |

## IV. Surplus School Sites and Existing Surplus Local Funds

Section 65995.6(b) states that the School District must identify and consider (i) surplus property, if any, owned by the School District that can be used as a school site or that is available for sale to finance school facilities, (ii) the extent to which projected enrollment growth can be accommodated at existing school facilities, and (iii) local sources that are available to finance the construction or reconstruction of school facilities needed to accommodate any growth in enrollment attributable to the construction of new residential units. Additionally, Section 65995.5(c)(2) requires the School District to subtract from the school facilities cost impact created by non-mitigated Future Units the amount of Local Funds that the governing board has dedicated to facilities necessitated by new residential units. To comply with Section 65995.6(b), the School District has identified and considered property it owns and has determined that it does possess one (1) site that could be considered surplus (see Exhibit K for information on these sites). The Governing Board will review and re-adopt this Analysis annually, including a review of this determination and any need to consider property that may then be surplus to fund school facilities required to accommodate students being generated from existing residential units, or other students.

As for identifying and considering existing excess capacity that could accommodate the Projected Student Enrollment generated from non-mitigated Future Units, Table 8 in Section III.C. of this Analysis illustrates that the School District has considered and determined that 69 excess seats exist at the elementary school level and 19 excess seats exist at the middle school level, and has reduced the Projected Student Enrollment generated from non-mitigated Future Units accordingly.

Finally, in accordance with Sections 65995.6(b) and 65995.5(c)(2), the School District has determined that $428,218, including Local Funds, are available to finance the construction or reconstruction of school facilities needed to accommodate any Projected Student Enrollment generated from Future Units (see Exhibit L for more detail on local sources, including Local Funds).

## V. Alternative No. 2 Fee

As discussed in Section I, the objective of this Analysis is (i) to determine whether the School District may adopt Alternative Fees and (ii) to determine the permissible amount of the Alternative No. 2 Fee and the Alternative No. 3 Fee that the School District is permitted to levy on new residential development. Based on the findings, determinations, and projections made in Sections II through IV, Section V contains a step-by-step calculation of the permissible Alternative No. 2 Fee in accordance with Section 65995.5.

### A. Alternative No. 2 Fee School Facility Costs

As stated in Section 65995.5(c)(1), the initial step in calculating the maximum Alternative No. 2 Fee is to multiply the number of unhoused students generated from non-mitigated Future Units by the appropriate per-pupil grant amounts provided in Section 17072.10(a) of the Education Code. In addition, the sum shall be added to the site acquisition and site development costs determined pursuant to Section 65995.5(h).

#### 1. Per-Pupil Grant Amounts

The per-pupil grant amounts identified in Section 17072.10(a) of the Education Code were adjusted by the SAB on January 25, 2012, pursuant to Section 17072.10(b) of the Education Code. The per-pupil grant amounts specified in Section 17072.10 are adjusted annually by the SAB to reflect construction cost changes as set forth in the statewide cost index for class B construction. Further, pursuant to SAB Regulation 1859.71.2 and Section 17074.56 of the Education Code, the per-pupil grants have been increased to account for automatic fire alarm detection systems and fire sprinkler systems. Table 9 shows the base per-pupil grant amounts.

**Table 9**
**Base Per-Pupil Grant Amounts (2012$)**

| School Level | Per-Pupil Grant Amount | Additional Grants for Auto Alarm and Fire Sprinkler System | Base Per-Pupil Grant Amount |
|---|---|---|---|
| Elementary School | $9,455 | $170 | $9,625 |
| Middle School | $9,999 | $205 | $10,204 |

In addition to the base per-pupil grant amounts shown in Table 9, SAB Regulation 1859.76 provides additional grants for general site development on new school construction projects. Currently, these additional grants are calculated as (i) 6 percent of the base per-pupil grants for elementary and middle school projects and (ii) a grant of $15,365 per new useable acre acquired for new school construction. To determine the general site development grant for each school level, Dolinka Group first applied the percentages mentioned above to the base per-pupil grant amounts shown in Table 9.

Second, Dolinka Group applied the grant per new useable acre mentioned above to the student capacity of future school facilities and corresponding site size requirements for the School District listed in Table 12 below to derive a grant amount per student (see Exhibit M for more information on the calculation of the additional grants for general site development). Table 10 shows these additional grants as well as the total per-pupil grant amount.

**Table 10**
**Total Per-Pupil Grant Amount (2012$)**

| School Level | Base Per-Pupil Grant Amount | Additional Grants for General Site Development | Total Per-Pupil Grant Amount |
|---|---|---|---|
| Elementary School | $9,625 | $865 | $10,490 |
| Middle School | $10,204 | $899 | $11,103 |

The understanding of the School District is that applicable law specifies the per-pupil grant amounts specified in Section 17072.10 are adjusted annually by the SAB to reflect construction cost changes as set forth in the statewide cost index for class B construction as provided in Section 17072.10(b) of the Education Code. The intent of the School District is to use the amount permissible by law.

## 2. Total New School Construction Grants

To determine the total new school construction grants under Section 65995.5, the number of Projected Unhoused Students to be generated from non-mitigated Future Units, as shown in Table 7, is multiplied by the total per-pupil grant amounts set forth in Section 17072.10(a) and (b) of the Education Code, as shown in Table 10. Table 11 shows the total new school construction grants of the School District pursuant to Section 65995.5(c)(1).

**Table 11**
**Total New School Construction Grants for Projected Unhoused Students from Non-Mitigated Future Units (2012$)**
**(In Accordance with Section 65995.5(c)(1) of the Government Code)**

| School Level | Projected Unhoused Students | Total Per-Pupil Grant Amount | Total New Construction Grants |
|---|---|---|---|
| Elementary School | 320 | $10,490 | $3,356,800 |
| Middle School | 68 | $11,103 | $755,004 |
| **Total** | **388** | **N/A** | **$4,111,804** |

## 3. Total School Site Acquisition and Site Development Costs

In addition to the total new school construction grants specified by Section 17072.10 of the Education Code, Section 65995.5(c)(1) permits the Alternative No. 2 Fee to include site acquisition and site development costs determined pursuant to Section 65995.5(h) and the applicable statutory provisions referred to therein. What follows is the calculation for determining the appropriate site acquisition and site development costs in accordance with Section 65995.5(h).

### a. Site Size Requirement

To calculate the amount of site acquisition and site development costs that may be included in the Alternative No. 2 Fee, a school district must determine the student capacity of future school facilities that will be needed to accommodate the Projected Unhoused Students, as well as students to be generated from residential development anticipated to occur over the next 20 years. Based on the educational programs of the School District, the School District has determined that in the future it will construct K-8 school facilities will be designed to accommodate 850 students. Based on this capacity, the guidelines included in the "School Site Analysis and Development Handbook" published by the State Department of Education as that handbook read as of January 1, 1998, identify the following site sizes for the School District.

**Table 12**
**Student Capacities and Site Sizes of Future School Facilities**

| School Level | Student Capacity | Site Size (Acres) |
|---|---|---|
| K-8 School | 850 | 15.90 |

It should be emphasized that the site sizes shown in Table 12 are based on site sizes recommended by the State Department of Education as of January 1, 1998. Since that time, the State Department of Education has prepared a revised Handbook that contains site size recommendations more consistent with School District policy. Please refer to Exhibit E for the site sizes more consistent with the revised Handbook.

### b. Site Acquisition and Site Development Costs per Acre

Based on recent appraisal information provided by the School District as well as information regarding property sales within the County, the School District believes that $122,000 per acre for site acquisition is a reasonable estimate. As for site development, the School District estimates the cost to be approximately $384,492 per acre (the site development cost was taken from the School Facilities Needs Analysis prepared in April 2011 and adjusted by the annual change in the construction cost index as published by Marshall & Swift). Table 13 lists the total estimated site acquisition costs and site development costs of the School District in accordance with Section 65995.5(h).

**Table 13**
**Site Acquisition and Site Development Costs of Future School Facilities (2012$)**

| School Level | Site Acquisition Cost [1] | Site Development Cost [1] | Total Site Cost |
|---|---|---|---|
| K-8 School | $1,939,800 | $6,113,423 | $8,053,223 |
| [1] The site acquisition and site development costs are equal to the per acre costs listed above multiplied by the number of acres, as listed in Table 12. | | | |

### c. School Facilities Needed

To ensure that non-mitigated Future Units are being charged an Alternative No. 2 Fee that is reasonably related to the school facilities that are required to house the Projected Unhoused Students to be generated from non-mitigated Future Units, the School District must identify the number of future school facilities that will be needed to house the Projected Unhoused Students to be generated from non-mitigated Future Units, as well as residential development anticipated to occur over the next 20 years. To calculate the number of school facilities that the School District will need to adequately house the Projected Unhoused Students, the number of Projected Unhoused Students for each school level, as listed in Table 7, was divided by the applicable student capacity, as listed in Table 12. The number of school sites expected to be needed to house the Projected Unhoused Students generated from non-mitigated Future Units is shown in Table 14.

**Table 14**
**School Facilities Needed**

| School Level | Total Facilities Needed | Facilities Needed for Students Generated from Mitigated Future Units | Facilities Needed for Students Generated from Non-Mitigated Future Units |
|---|---|---|---|
| K-8 School | 0.581 | 0.125 | 0.456 |

It is important to realize that while the number of Projected Unhoused Students from non-mitigated Future Units equates only to approximately 45.6 percent of a K-8 School, the School District will need to construct at least one (1) K-8 School in the future to accommodate (i) students generated from mitigated Future Units, (ii) students generated from non-mitigated Future Units, and (iii) students generated from future residential units beyond the next five (5) years.

### d. Alternative No. 2 Fee Site Costs in Accordance with Section 65995.5(h) of the Government Code

The calculation of the total school site acquisition and site development cost impacts under Section 65995.5(h) is a two-step process. The first step involves calculating the total school site acquisition and site development costs related to the Projected Unhoused Students generated from non-mitigated Future Units. The calculation of this first step is shown in Table 15.

**Table 15**
**Total School Site Acquisition and Site Development Costs for Students from Non-Mitigated Future Units (2012$)**

| School Level | Facilities Needed for Students Generated from Non-Mitigated Future Units | Site Cost | Total Site Costs |
|---|---|---|---|
| K-8 School | 0.456 | $8,053,223 | $3,672,270 |

Only a portion of the total site costs may be included in the calculation of the Alternative No. 2 Fee. Accordingly, the total school site acquisition and site development costs under Section 65995.5(h) must be reduced by half to arrive at the Alternative Fee No. 2 Site Costs. The calculation of this step is shown in Table 15.

**Table 16**
**Alternative No. 2 Fee Site Costs (2012$)**
**(In Accordance with Section 65995.5(h) of the Government Code)**

| School Level | Total Site Costs | Multiplier | Alternative No. 2 Fee Site Cost |
|---|---|---|---|
| K-8 School | $3,672,270 | 50.00% | $1,836,135 |

**4. <u>Alternative No. 2 Fee School Facility Costs</u>**

As stated previously, the initial step in calculating the maximum Alternative No. 2 Fee is to identify (i) the total new school construction grant, and (ii) the site acquisition and development costs pursuant to Section 65995.5(h). The sum of these amounts, which is the Alternative No. 2 Fee School Facility Costs, is the maximum amount of school facility costs that may be included in the Alternative No. 2 Fee before any local fund credits are applied. For the School District, the total new school construction grant is $4,111,804 and the total site acquisition and site development cost pursuant to Section 65995.5(h) is $1,836,135. These costs and the Alternative No. 2 Fee School Facility Costs are shown by school level in Table 16.

**Table 17**
**Alternative No.2 Fee School Facility Costs (2012$)**
**(In Accordance with Section 65995.5(c)(1) of the Government Code)**

| School Level | Total New Construction Grants | Alternative No. 2 Fee Site Costs | Alternative No. 2 Fee School Facility Costs |
|---|---|---|---|
| K-8 School | $4,111,804 | $1,836,135 | $5,947,939 |

## B. Credit for Local Funds

The second step in calculating the maximum Alternative No. 2 Fee is to subtract the amount of local sources, including Local Funds, if any, the School District has decided to dedicate to school facilities necessitated by the construction of non-mitigated Future Units from the Alternative No. 2 Fee School Facility Costs in order to calculate the Net Alternative No. 2 Fee School Facility Costs. As stated in Section IV of the Analysis, the School District has determined that $428,218 is available to accommodate Projected Unhoused Students generated from Future Units (see Exhibit L for more detail on local sources, including Local Funds).

**Table 18**
**Net Alternative No.2 Fee School Facility Costs (2012$)**
**(In Accordance with Section 65995.5(c)(2) of the Government Code)**

| Item | Amounts |
|---|---|
| Alternative No. 2 Fee School Facility Costs | $5,947,939 |
| Credit for Existing Surplus Local Funds | $428,218 |
| **Net Alternative No. 2 Fee School Facility Costs** | **$5,519,721** |

## C. Alternative No. 2 Fee Calculation

The final step in calculating the maximum Alternative No. 2 Fee is to divide the Net Alternative No. 2 Fee School Facility Costs by the total square footage of assessable space for non-mitigated Future Units.

### 1. Average Square Footage per Unit

In order to project the total square footage of assessable space of the non-mitigated Future Units, the Analysis must estimate the average square footage of Future SFD Units, Future SFA Units, and Future MF Units to be constructed in the School District. To estimate the average square footage of Future SFD Units, Future SFA Units and Future MF Units to be constructed in the School District, Dolinka Group analyzed residential square footage information for units constructed during the last five (5) years as provided by the County. These estimates were provided to Planning Departments of the City and County for additional input. Based on this information, the average Future SFD Unit to be constructed within the School District is estimated to contain 2,650 square feet, the average Future SFA Unit is estimated to contain 1,431 square feet, and the average MF unit estimated to contain 1,288 square feet (see Exhibit G).

### 2. Total Square Footage of Assessable Space

To calculate the total square footage of assessable space for non-mitigated Future Units, the average square footage of Future SFD Units, Future SFA Units, and Future MF Units listed above was multiplied by the number of non-mitigated Future Units listed in Table 4. The results of this operation are shown in Table 19.

**Table 19**
**Estimated Total Residential Square Footage**

| Land Use | Non-Mitigated Future Units | Average Square Footage | Total Square Footage |
|---|---|---|---|
| Single Family Detached | 350 | 2,650 | 927,500 |
| Single Family Attached | 425 | 1,431 | 608,175 |
| Multifamily | 346 | 1,288 | 445,648 |
| **Total** | **1,121** | **N/A** | **1,981,323** |

It should be noted that the total assessable square footage calculated in Table 19 includes that of units which may be constructed as a result of Reconstruction. For more information on Reconstruction, please see Exhibit H.

### 3. Calculation of Alternative No. 2 Fee

To calculate the Alternative No. 2 Fee, which may be established by the School District only during periods when the State does have new construction funding available, the Net Alternative No. 2 Fee School Facility Costs, as listed in Table 17, were divided by the total square footage of assessable space of the non-mitigated Future Units, as listed in Table 19. Table 20 provides the Alternative No. 2 Fee that can be adopted by the School District.

**Table 20**
**Alternative No. 2 Fee (2012$)**

| Item | Amount/Square Footage |
|---|---|
| Net Alternative No. 2 Fee School Facility Costs | $5,519,721 |
| Total Residential Square Footage | 1,981,323 |
| **Alternative No. 2 Fee** | **$2.79** |

# VI. Alternative No. 3 Fee

The Alternative No. 2 Fee, which is the maximum Alternative Fee that may be imposed during periods when State funds for new construction are available, was calculated in Section V in accordance with Section 65995.5. During periods when the SAB is no longer approving apportionments for new construction due to a lack of funds available, the Alternative No. 3 Fee may be imposed by a school district, subject to the suspension of Alternative No. 3 Fees as set forth in Section 65995.7(a)(2). Additionally, in accordance with Section 1859.81 of the SAB regulations, a school district requesting financial hardship assistance funding is required to impose the maximum developer fee justified by law (the Alternative No. 2 Fee, or the Alternative No. 3 Fee when the State declares that such fees can be imposed), or an alternative source greater than or equal to the amount of such fees. Similar to the methodology of the calculations performed in Section V, this Section VI provides a calculation of the Alternative No. 3 Fee in accordance with Section 65995.7.

## A. Alternative No. 3 Fee School Facility Costs

Pursuant to Section 65995.7, the Alternative No. 3 Fee School Facility Cost, which is the maximum amount of school facility costs that may be included in the Alternative No. 3 Fee, is calculated by increasing the Net Alternative No. 2 Fee School Facility Costs by an amount not to exceed the Alternative No. 2 Fee School Facility Costs. As required by Section 65995.7, this amount has been reduced by the amount of local funds ($428,218 in the case of the School District) identified pursuant to Section 65995.5(c)(2). Accordingly, Table 21 shows the Net Alternative No. 2 Fee School Facility Costs previously shown in Table 17, and adds to that amount the Alternative No. 2 Fee School Facility Costs previously shown in Table 16. The result, shown in Table 21, is the Alternative No. 3 Fee School Facility Costs.

**Table 21**
**Alternative No. 3 Fee School Facility Costs (2012$)**
**(In Accordance with Section 65995.7 of the Government Code)**

| Item | Amounts |
|---|---|
| Net Alternative No. 2 Fee School Facility Costs | $5,519,721 |
| Alternative No. 2 Fee School Facility Costs | $5,947,939 |
| **Alternative No. 3 Fee School Facility Costs** | **$11,467,660** |

## B. Alternative No. 3 Fee Calculation

To calculate the Alternative No. 3 Fee, the Alternative No. 3 Fee School Facility Costs were divided by the total square footage of assessable space of the non-mitigated Future Units listed in Table 19. This calculation is required by Section 65995.5(c)(3) and outlined in Section V.C. of the Analysis. Table 22 provides the Alternative No. 3 Fee that can be levied by the School District on new residential development where permitted by applicable law.

**Table 22**
**Alternative No. 3 Fee (2012$)**

| Item | Amount/Square Footage |
|---|---|
| Alternative No. 3 School Facility Costs | $11,467,660 |
| Total Residential Square Footage | 1,981,323 |
| **Alternative No. 3 Fee** | **$5.79** |

## VII. Section 66000 of the Government Code

Sections 66000 *et seq.* were enacted by the State in 1987. These provisions are assumed to be applicable to the Alternative Fees. Sections 66000 *et seq.* require that all public agencies satisfy the following requirements when establishing, increasing or imposing a fee, such as the herein described Alternative Fees, as a condition of approval for a development project.

1. Determine the purpose of the fee.

2. Identify the facilities to which the fee will be put.

3. Determine that there is a reasonable relationship between the need for public facilities and the type of development on which a fee is imposed.

4. Determine that there is a reasonable relationship between the amount of the fee and the public facility or portion of the public facility attributable to the development on which the fee is imposed.

5. Provide an annual accounting of any portion of the fee remaining unexpended or uncommitted in the School District's accounts.

New residential development in the School District, as shown in the Analysis, will generate additional students who will require the School District to provide additional school facilities. The amount to be included in the Alternative Fees is specified by statute. The Alternative No. 2 Fee of $2.79 per square foot and the Alternative No. 3 Fee of $5.79 per square foot are justified in the Analysis. The estimated average school facilities cost impacts on the School District per square foot of residential development as estimated in Exhibit E is $10.23. As the actual school facilities cost impacts per square foot of residential construction is greater than the Alternative Fees, it is reasonable for the School District to determine that the Alternative No. 2 Fee of $2.79 per square foot and the Alternative No. 3 Fee of $5.79 per square foot are roughly proportional and reasonably related to the actual impacts caused by residential development on the School District.

This Analysis and the information included in Exhibit E therefore establish that the Alternative Fees meet the requirements of Sections 66000 *et seq.* and such a determination by the School District as part of adopting the Alternative Fees is justified and appropriate. Further, as determined in Exhibit H, which reviewed the potential impact of Reconstruction, it has been determined that the impact of such units is greater than the Alternative Fees identified herein. The School District, therefore, is justified in levying Alternative Fees on all new development, including Reconstruction.

By way of summary, the Alternative Fees will be used to fund (i) new school facilities, (ii) expansion of existing school facilities, and (iii) other upgrades to existing school facilities, but only to the extent that such items are needed to accommodate the Projected Unhoused Students generated from Future Units and to the extent that the use of the Alternative Fees on such items is permitted by applicable law.

S:\Clients\San Ysidro School District\Demographics\SFNA\SY1112\Reports\SFNA_12725-3901.doc

# Exhibit A

## Current SAB Form 50-01

D/U

OPSC-2/10
Logged - 2/22/10
AS-MR

STATE OF CALIFORNIA

# ENROLLMENT CERTIFICATION/PROJECTION

SAB 50-01 (REV 06/08)

STATE ALLOCATION BOARD
OFFICE OF PUBLIC SCHOOL CONSTRUCTION



SCHOOL DISTRICT: San Ysidro

FIVE DIGIT DISTRICT CODE NUMBER (*see California Public School Directory*): 68379

COUNTY: San Diego

HIGH SCHOOL ATTENDANCE AREA (HSAA) OR SUPER HSAA (*if applicable*):

Check one: ☑ Fifth-Year Enrollment Projection ☐ Tenth-Year Enrollment Projection

HSAA Districts Only - Check One: ☐ Attendance ☐ Residency

☐ Residency - COS Districts Only - (Fifth Year Projection Only)

☐ Modified Weighting (Fifth-Year Projection Only)

☑ Alternate Weighting - (Fill in boxes to the right):

| 3rd Prev. to 2nd Prev. | 2nd Prev. to Prev. | Previous to Current |
|---|---|---|
| 1 | 11 | 5 |

Part G. Number of New Dwelling Units (Fifth-Year Projection Only): 1,721

Part H. District Student Yield Factor (Fifth-Year Projection Only): 0.5682

## Part A. K-12 Pupil Data

| Grade | 7th Prev. 2001/02 | 6th Prev. 2002/03 | 5th Prev. 2003/04 | 4th Prev. 2004/05 | 3rd Prev. 2005/06 | 2nd Prev. 2006/07 | Previous 2007/08 | Current 2008/09 |
|---|---|---|---|---|---|---|---|---|
| K | 470 | 502 | 520 | 492 | 534 | 559 | 467 | 468 |
| 1 | 537 | 545 | 525 | 547 | 512 | 517 | 543 | 504 |
| 2 | 549 | 514 | 535 | 548 | 513 | 459 | 535 | 543 |
| 3 | 528 | 553 | 527 | 534 | 554 | 487 | 481 | 515 |
| 4 | 488 | 550 | 547 | 526 | 529 | 511 | 496 | 506 |
| 5 | 533 | 477 | 555 | 560 | 533 | 513 | 515 | 501 |
| 6 | 546 | 525 | 495 | 591 | 570 | 542 | 515 | 510 |
| 7 | 517 | 614 | 588 | 542 | 606 | 578 | 645 | 555 |
| 8 | 479 | 562 | 616 | 631 | 562 | 561 | 544 | 636 |
| 9 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 |
| 10 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 |
| 11 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 |
| 12 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 |
| TOTAL | 4647 | 4842 | 4908 | 4971 | 4913 | 4727 | 4741 | 4738 |

## Part B. Pupils Attending Schools Chartered By Another District

| 7th Prev. | 6th Prev. | 5th Prev. | 4th Prev. | 3rd Prev. | 2nd Prev. | Previous | Current |
|---|---|---|---|---|---|---|---|
| 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 |

## Part C. Continuation High School Pupils - (Districts Only)

| Grade | 7th Prev. | 6th Prev. | 5th Prev. | 4th Prev. | 3rd Prev. | 2nd Prev. | Previous | Current |
|---|---|---|---|---|---|---|---|---|
| 9 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 |
| 10 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 |
| 11 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 |
| 12 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 |
| TOTAL | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 |

## Part D. Special Day Class Pupils - (Districts or County Superintendent of Schools)

| | Elementary | Secondary | TOTAL |
|---|---|---|---|
| Non-Severe | 100 | 0 | 100 |
| Severe | 46 | 0 | 46 |
| TOTAL | 146 | 0 | |

## Part E. Special Day Class Pupils - (County Superintendent of Schools Only)

| 7th Prev. 2001/02 | 6th Prev. 2002/03 | 5th Prev. 2003/04 | 4th Prev. 2004/05 | 3rd Prev. 2005/06 | 2nd Prev. 2006/07 | Previous 2007/08 | Current 2008/09 |
|---|---|---|---|---|---|---|---|
| | | | | | | | |

## Part F. Birth Data - (Fifth-Year Projection Only)

☐ County Birth Data ☑ Birth Data by District Zip Codes

| 8th Prev. | 7th Prev. | 6th Prev. | 5th Prev. | 4th Prev. | 3rd Prev. | 2nd Prev. (☐ Estimate) | Previous (☐ Estimate) | Current (☐ Estimate) |
|---|---|---|---|---|---|---|---|---|
| 2166 | 2177 | 2216 | 2351 | 2465 | 2393 | 2501 | 2410 | 2528 |

## Part I. Projected Enrollment

### 1. Fifth-Year Projection

Enrollment/Residency - (except Special Day Class pupils)

| K-6 | 7-8 | 9-12 | TOTAL |
|---|---|---|---|
| 4382 | 1343 | 0 | 5725 |

Special Day Class pupils only - Enrollment/Residency

| | Elementary | Secondary | TOTAL |
|---|---|---|---|
| Non-Severe | 109 | 0 | 109 |
| Severe | 50 | 0 | 50 |
| TOTAL | 159 | 0 | |

### 2. Tenth-Year Projection

Enrollment/Residency - (except Special Day Class pupils)

| K-6 | 7-8 | 9-12 | TOTAL |
|---|---|---|---|
| | | | |

Special Day Class pupils only - Enrollment/Residency

| | Elementary | Secondary | TOTAL |
|---|---|---|---|
| Non-Severe | | | |
| Severe | | | |
| TOTAL | | | |

*I certify, as the District Representative, that the information reported on this form and, when applicable, the High School Attendance Area Residency Reporting Worksheet attached, is true and correct and that:*

*• I am designated as an authorized district representative by the governing board of the district.*

*• If the district is requesting an augmentation in the enrollment projection pursuant to Regulation Section 1859.42.1 (a), the local planning commission or approval authority has approved the tentative subdivision map used for augmentation of the enrollment and the district has identified dwelling units in that map to be contracted. All subdivision maps used for augmentation of enrollment are available at the district for review by the Office of Public School Construction (OPSC).*

*• This form is an exact duplicate (verbatim) of the form provided by the Office of Public School Construction. In the event a conflict should exist, then the language in the OPSC form will prevail.*

NAME OF DISTRICT REPRESENTATIVE (PRINT OR TYPE): Thomas Silva

SIGNATURE OF DISTRICT REPRESENTATIVE: Thomas Silva

DATE: 2/11/2010

TELEPHONE NUMBER: (619)428-4476 ext 3004

E-MAIL ADDRESS: tsilva@sysd.k12.ca.us

# Exhibit B

## Current SAB Form 50-02

STATE OF CALIFORNIA

# EXISTING SCHOOL BUILDING CAPACITY

SAB 50-02 (Rev. 07/01) Excel (Rev. 05/03/2002)

STATE ALLOCATION BOARD
OFFICE OF PUBLIC SCHOOL CONSTRUCTION



SCHOOL DISTRICT: SAN YSIDRO ELEMENTARY

FIVE DIGIT DISTRICT CODE NUMBER (see California Public School Directory): 68379

COUNTY: SAN DIEGO

HIGH SCHOOL ATTENDANCE AREA (HSAA) OR SUPER HSAA (if applicable):

## PART I - Classroom Inventory ☐ NEW ☐ ADJUSTED

| | K-6 | 7-8 | 9-12 | Non-Severe | Severe | Total |
|---|---|---|---|---|---|---|
| Line 1. Leased State Relocatable Classrooms | | | | | | |
| Line 2. Portable Classrooms leased less than 5 years | | | | | | |
| Line 3. Interim Housing Portables leased less than 5 years | 2 | | | | | 2 |
| Line 4. Interim Housing Portables leased at least 5 years | | | | | | |
| Line 5. Portable Classrooms leased at least 5 years | | | | | | |
| Line 6. Portable Classrooms owned by district | 33 | 1 | | 1 | 12 | 47 |
| Line 7. Permanent Classrooms | 94 | 30 | | | | 124 |
| Line 8. Total (Lines 1 through 7) | 129 | 31 | | 1 | 12 | 173 |

## PART II - Available Classrooms

**Option A.**

| | K-6 | 7-8 | 9-12 | Non-Severe | Severe | Total |
|---|---|---|---|---|---|---|
| a. Part I, line 4 | | | | | | |
| b. Part I, line 5 | | | | | | |
| c. Part I, line 6 | 33 | 1 | | 1 | 12 | 47 |
| d. Part I, line 7 | 94 | 30 | | | | 124 |
| e. Total (a, b, c, & d) | 127 | 31 | | 1 | 12 | 171 |

**Option B.**

| | K-6 | 7-8 | 9-12 | Non-Severe | Severe | Total |
|---|---|---|---|---|---|---|
| a. Part I, line 8 | 129 | 31 | | 1 | 12 | 173 |
| b. Part I, lines 1,2,5 and 6 (total only) | | | | | | 47 |
| c. 25 percent of Part I, line 7 (total only) | | | | | | 31 |
| d. Subtract c from b (enter 0 if negative) | 12 | | | | 4 | 16 |
| e. Total (a minus d) | 117 | 31 | | 1 | 8 | 157 |

## PART III - Determination of Existing School Building Capacity

| | K-6 | 7-8 | 9-12 | Non-Severe | Severe |
|---|---|---|---|---|---|
| Line 1. Classroom capacity | 2,925 | 837 | | 13 | 72 |
| Line 2. SER adjustment | 137 | 39 | | 1 | 3 |
| Line 3. Operational Grants | | | | | |
| Line 4. Greater of line 2 or 3 | 137 | 39 | | 1 | 3 |
| Line 5. Total of lines 1 and 4 | 3,062 | 876 | | 14 | 75 |

*I certify, as the District Representative, that the information reported on this form is true and correct and that:*
*I am designated as an authorized district representative by the governing board of the district; and,*
*This form is an exact duplicate (verbatim) of the form provided by the Office of Public School Construction (OPSC).*
*In the event a conflict should exist, then the language in the OPSC form will prevail.*

SIGNATURE OF DISTRICT REPRESENTATIVE: John E. Lim

DATE: July 8, 2002

# Exhibit C

## Current SAB Form 50-03

STATE OF CALIFORNIA

STATE ALLOCATION BOARD

# ELIGIBILITY DETERMINATION

OFFICE OF PUBLIC SCHOOL CONSTRUCTION

SAB 50-03 (Rev. 07/01) Excel (Rev. 05/03/2002)



| | |
|---|---|
| SCHOOL DISTRICT<br>SAN YSIDRO ELEMENTARY | FIVE DIGIT DISTRICT CODE NUMBER (see California Public School Directory)<br>68379 |
| BUSINESS ADDRESS<br>4350 Otay Mesa Road | HIGH SCHOOL ATTENDANCE AREA (HSAA) OR SUPER HSAA (if applicable) |
| CITY<br>San Diego, CA 92173-1685 | COUNTY<br>SAN DIEGO |

**Part I** - The following individual(s) have been designated as district representative(s) by school board minutes:

| DISTRICT REPRESENTATIVE | TELEPHONE NUMBER | E-MAIL ADDRESS |
|---|---|---|
| John Linn | Business Manager | jlinn@sysd.k12.ca.us |
| DISTRICT REPRESENTATIVE | TELEPHONE NUMBER | E-MAIL ADDRESS |

| **Part II** - New Construction Eligibility ☐ NEW ☑ ADJUSTED | K-6 | 7-8 | 9-12 | Non-Severe | Severe |
|---|---|---|---|---|---|
| 1. Projected Enrollment (Part G, Form SAB 50-01) | 5,319 | 1,569 | | 24 | 138 |
| 2. Existing School Building Capacity (Part III, line 5 of Form SAB 50-02) | 3,062 | 876 | | 14 | 75 |
| 3. New Construction Baseline Eligibility ( line 1 minus line 2) | 2,257 | 693 | | 10 | 63 |

**Part III** - Modernization Eligibility ☐ NEW ☐ ADJUSTED

1. SCHOOL NAME:

| **Option A** | K-6 | 7-8 | 9-12 | Non-Severe | Severe |
|---|---|---|---|---|---|
| 2. Permanent classrooms at least 25 years old | | | | | |
| 3. Portable classrooms at least 20 years old | | | | | |
| 4. Total (lines 2 and 3) | | | | | |
| 5. Multiply line 4 by: 25 for K-6, 27 for 7-8 and 9-12; 13 for non-severe and 9 for severe | | | | | |
| 6. CBEDS enrollment at school | | | | | |
| 7. Modernization eligibility (lesser of the totals of line 5 or 6) | | | | | |

**Option B**

| | |
|---|---|
| 2. Permanent space at least 25 years old (report by classroom or square footage) | |
| 3. Portable space at least 20 years old (report by classroom or square footage) | |
| 4. Total (lines 2 and 3) | |
| 5. Remaining permanent and portable space (report by classroom or square footage) | |
| 6. Total (lines 4 and 5) | |
| 7. Percentage (divide line 4 by line 6) | 0% |

| | K-6 | 7-8 | 9-12 | Non-Severe | Severe |
|---|---|---|---|---|---|
| 8. CBEDS enrollment at school site | | | | | |
| 9. Modernization eligibility (multiply line 7 by each grade group on line 8) | | | | | |

*I certify, as the District Representative, that the information reported on this form is true and correct and that; I am designated as an authorized district representative by the governing board of the district; and; A resolution or other appropriate documentation supporting this application under Chapter 12.5, Part 10, Division 1, commencing with Section 17070.10, et seq., of the Education Code was adopted by the School District's Governing Board on _____; and, This form is an exact duplicate (verbatim) of the form provided by the Office of Public School Construction (OPSC). In the event a conflict should exist, then the language in the OPSC form will prevail.*

| SIGNATURE OF DISTRICT REPRESENTATIVE | DATE |
|---|---|
| John L. Linn | July 8, 2002 |

# Exhibit D

## Eligibility Determination from the SAB

Public School Construction

Monday, April 2, 2012

Project Tracking System: School Facility Program: Project Summary

| | | | |
|---|---|---|---|
| **District:** | San Ysidro Elementary | **Application No:** | 50/68379-00-000 |
| **District Rep:** | Ms. Dena Whittington | **County:** | San Diego |

## SAB 50-03 New Construction Eligibility Information

### New Construction Baseline Eligibility

| **Grade Level:** | **K - 6** | **7 - 8** | **9 - 12** | **Non-Severe** | **Severe** |
|---|---|---|---|---|---|
| **Established Eligibility:** | 1712 | 636 | 0 | 0 | 0 |
| **SAB Approvals/Adjustments:** | -1240 | -511 | 0 | 233 | -52 |
| **Remaining Eligibility:** | 472 | 125 | 0 | 233 | -52 |

### SAB 50-03 Eligibility Document Status/Dates

| | |
|---|---|
| **Status:** | PM Complete |
| **Date Signed:** | 1/25/2000 |
| **Date Received:** | 6/24/1999 |
| **SAB Approval Date:** | 2/23/2000 |

If you have any questions regarding this information you can contact the assigned Project Manager:

| | |
|---|---|
| **OPSC Project Manager:** | Deah Johnson |
| **Telephone:** | (916) 376-1658 |
| **E-mail Address:** | deah.johnson@dgs.ca.gov |

**View Modernization Eligibility**

**Project Tracking Home**

Back to Top of Page

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# Exhibit E

## Summary of School Facility Planning Policies and Estimates of Actual School Facility Costs

## San Ysidro School District
### School Facility Cost Impacts per Residential Square Foot
### April 2012

**School Facility Costs**

| School Level | Site Acquisition Cost | Construction Cost | Total Cost |
|---|---|---|---|
| K-8 School | $2,110,598 | $34,072,141 | $36,182,739 |

**Costs per Student**

| School Level | Total Cost | Students Housed | Cost per Student |
|---|---|---|---|
| K-8 School | $36,182,739 | 850 | $42,568 |

**School Facility Cost Impacts per Residential Unit**

| School Level | Cost per Student | Weighted Average SGR | Cost per Unit |
|---|---|---|---|
| K-8 School | $42,568 | 0.4246 | $18,075 |
| **Total School Facility Cost Impact** | | | **$18,075** |
| Average Square Footage [1] | | | 1,767 |
| **School Facility Cost Impact per Square Foot** | | | **$10.23** |

[1] See Table 19 of the Analysis.

## San Ysidro School District
**Summary of Estimated Costs**
**K-8 School**
**April 2012**

| | | | | |
|---|---|---|---|---|
| **A. Site** | | | | **$2,150,598** |
| | Purchase Price of Property | | $2,110,598 | |
| | | Acres[1]: 17.3 | | |
| | | Cost/Acre: $122,000 | | |
| | EIR | | $20,000 | |
| | Appraisals | | $10,000 | |
| | Surveys | | $5,000 | |
| | Escrow/Title | | $5,000 | |
| | [1] Assumes Net Usable Acres. | | | |
| **B. Plans** | | | | **$1,819,000** |
| | Architect's Fee (see Architect Fee Schedule worksheet) | | $1,632,500 | |
| | Preliminary Tests | | $20,000 | |
| | DSA/SDE Plan Check | | $146,500 | |
| | Energy Fee Analysis | | $15,000 | |
| | Other | | $5,000 | |
| **C. Construction** | | | | **$28,900,000** |
| | (Includes Construction, Site Development, General Site Development, and Technology) | | | |
| | | Square Feet / Student 100 | | |
| | | Cost / Square Feet $340 | | |
| **D. Tests** | | | | **$50,000** |
| **E. Inspection** | | | | **$144,000** |
| | ($12,000 per month for 12 months) | | | |
| **F. Furniture and Equipment** | | | | **$705,500** |
| | ($5 per Square Foot, includes Cost Index Adjustment of 66%) | | | |
| **G. Contingency** | | | | **$508,536** |
| | ($2,000 + 1.5% of items A-F) | | | |
| **H. Items Not Funded by the State** | | | | **$1,905,105** |
| | Technology (5% of Construction) | | $1,445,000 | |
| | Library Books (8 books/student @ $15) | | $102,000 | |
| | Landscaping ($0.44/sq. ft x 17.3 acres) | | $331,579 | |
| | Landscape Architect Fees (8% of Landscaping) | | $26,526 | |
| **I. Total Estimated Cost** | | | | **$36,182,739** |

| Summary | |
|---|---|
| School Facilities Capacity - Traditional Calendar | **850** |
| School Facilities Cost per Student - Traditional Calendar | **$42,568** |

# Exhibit F

## Bonding Capacity Calculation

**San Ysidro School District**
**Bonding Capacity Calculation**
**Fiscal Year 2011/2012**

| Description | Value |
|---|---|
| (1) Gross assessed value of the unitary and operating nonunitary property within the District for 1987/1988 | $25,556,020 |
| (2) Gross assessed value of all unitary and operating nonunitary property within the county for 1987/1988 | $7,684,467,530 |
| (3) Item 1 divided by item 2 | 0.3325672% |
| (4) Gross assessed value of all unitary and operating nonunitary property within the County on the last equalized roll | $9,673,501,482 |
| (5) Item 4 multiplied by item 3 | $32,170,895 |
| (6) Taxable property of the District excluding unitary and operating nonunitary property described above | $4,693,341,521 |
| (7) Item 6 plus item 5 | $4,725,512,416 |
| (8) Enter applicable percentage bond debt limit<br>Section 15102 (School District) 1.25%[1]<br>Section 15108 (Unified School District) 2.5% | 2.15% |
| (9) Bonding capacity | $101,598,517 |
| (10) Senate Bill 50 local bonding capacity threshold 15% of District's local bonding capacity | $15,239,778 |
| (11) Senate Bill 50 local bonding capacity threshold 30% of District's local bonding capacity | $30,479,555 |

[1] SYSD's bonding capacity increased to 2.15% based on bonding capacity waiver approved by the State Board of Education dated September 2004.

Source: San Diego County Office of the Auditor-Controller

# Exhibit G

## Correspondence with the City and County

March 19, 2012

Ms. Mary Wright, AICP
Deputy Director – Planning Division
City of San Diego
1222 1st Avenue, MS 413
San Diego, CA 92101

**Re: Residential Development Projections within San Ysidro School District Boundaries**

Dear Ms. Wright,

Dolinka Group, LLC is in the process of preparing a School Facilities Needs Analysis ("SFNA" or "Analysis") for the San Ysidro School District ("School District"). Pursuant to Section 65995.5(c)(3) of the Government Code, one component of the Analysis is an estimate of the number, type, and square footage of expected future residential units ("Future Units") to be constructed in the area of the City of San Diego ("City") served by the School District **over the next five (5) years.**

Projections regarding the Future Units to be constructed within the area of the City served by the School District are shown on the following page. Based on information obtained from the School District, Dolinka Group has prepared Future Unit estimates and Future Unit square footage estimates for the School District. Dolinka Group would like to provide the City with the opportunity to review, and if necessary, modify these projections. Please complete the attached page ("Certificate") and return to Dolinka Group by **April 2, 2012.**

Ms. Wright, should you have any questions regarding the projections please contact me at 949.250.8300. We sincerely appreciate your assistance in providing this information and look forward to hearing from you soon.

Sincerely,

Andrew Bishop
Associate Director

cc: Sara Osborn, Planner, San Ysidro Community Planning Group, City of San Diego

S:\Clients\San Ysidro School District\Demographics\SFNA\SY1112\Correspondence\20120319_MWrightSanDiego.doc

In its efforts to assist Dolinka Group, LLC in preparing the Analysis in accordance with the guidelines of Section 65995.5(c)(3) of the Government Code for the San Ysidro School District, the City of San Diego ("City"):

___The City concurs with the residential development projections as provided below:

| Unit Type | Projected Number of Units [1] | Estimated Average Square Footage per Unit |
|---|---|---|
| Single Family Detached<br>*(i.e. single family home)* | 350 | 2,650 |
| Single Family Attached<br>(e.*g. condos, townhomes, etc.)* | 425 | 1,431 |
| Multifamily<br>*(i.e. apartments, duplexes, triplexes, etc.)* | 740 | 1,288 |

[1] Excludes units designated as age restricted (i.e. requiring residents to be at least 55 years of age).

___The residential development projected by the City is listed below:

| Unit Type | Projected Number of Units [1] | Estimated Average Square Footage per Unit |
|---|---|---|
| Single Family Detached<br>*(i.e. single family home)* | | |
| Single Family Attached<br>(e.*g. condos, townhomes, etc.)* | | |
| Multifamily<br>*(i.e. apartments, duplexes, triplexes, etc.)* | | |

[1] Excludes units designated as age restricted (i.e. requiring residents to be at least 55 years of age).

Signed, _____, of the City of San Diego on _____.

Printed Name:_____

Title: _____

March 19, 2012

Mr. Jeff Murphy
Deputy Director of Project Planning
5201 Ruffin Road, Suite B
San Diego, CA 92123

**Re: Residential Development Projections within San Ysidro School District Boundaries**

Dear Mr. Murphy,

Dolinka Group, LLC is in the process of preparing a School Facilities Needs Analysis ("SFNA" or "Analysis") for the San Ysidro School District ("School District"). Pursuant to Section 65995.5(c)(3) of the Government Code, one component of the Analysis is an estimate of the number, type, and square footage of expected future residential units ("Future Units") to be constructed in the area of the County of San Diego ("County") served by the School District **over the next five (5) years.**

Projections regarding the Future Units to be constructed within the area of the County served by the School District are shown on the following page. Based on information previously obtained from the County and the School District, Dolinka Group has prepared Future Unit estimates and Future Unit square footage estimates for the School District. Dolinka Group would like to provide the County with the opportunity to review, and if necessary, modify these projections. Please complete the attached page ("Certificate") and return to Dolinka Group by **April 2, 2012**.

Mr. Murphy, should you have any questions regarding the projections please contact me at 949.250.8300. We sincerely appreciate your assistance in providing this information and look forward to hearing from you soon.

Sincerely,

Andrew Bishop
Associate Director

S:\Clients\San Ysidro School District\Demographics\SFNA\SY1112\Correspondence\20120319_JMurphyCounty.doc

In its efforts to assist Dolinka Group, LLC in preparing the Analysis in accordance with the guidelines of Section 65995.5(c)(3) of the Government Code for the San Ysidro School District, the County of San Diego ("County"):

___The County concurs with the residential development projections as provided below:

| Unit Type | Projected Number of Units [1] | Estimated Average Square Footage per Unit |
|---|---|---|
| Single Family Detached<br>*(i.e. single family home)* | 0 | N/A |
| Single Family Attached<br>(e*.g. condos, townhomes, etc.)* | 0 | N/A |
| Multifamily<br>*(i.e. apartments, duplexes, triplexes, etc.)* | 0 | N/A |

[1] Excludes units designated as age restricted (i.e. requiring residents to be at least 55 years of age).

___The residential development projected by the County is listed below:

| Unit Type | Projected Number of Units [1] | Estimated Average Square Footage per Unit |
|---|---|---|
| Single Family Detached<br>*(i.e. single family home)* | | |
| Single Family Attached<br>(e*.g. condos, townhomes, etc.)* | | |
| Multifamily<br>*(i.e. apartments, duplexes, triplexes, etc.)* | | |

[1] Excludes units designated as age restricted (i.e. requiring residents to be at least 55 years of age).

Signed, _____, of the County of San Diego on _____.

Printed Name:_____

Title: _____

# Exhibit H

## Facilities Cost Impacts of Reconstruction

Reconstruction is the act of replacing existing structures with new construction, which may have an alternative land use (i.e. commercial/industrial versus residential). This section examines the facilities cost impacts of two specific types of Reconstruction: (i) Residential Reconstruction and (ii) Reconstruction of Commercial/Industrial Construction into Residential Construction.

## A. Residential Reconstruction

Residential Reconstruction consists of voluntarily demolishing existing residential units and replacing them with new residential development. Dolinka Group is aware that a measurable amount of Residential Reconstruction has occurred within the School District over the previous five (5) years, and that a similar amount may occur over the next five (5) years. In order to examine the potential facilities cost impacts that Residential Reconstruction could have upon the School District, Dolinka Group evaluated historical information submitted to the California Department of Finance ("DOF") regarding demolished units. Dolinka Group evaluated demolished unit data for the City of San Diego ("City"), as well as the unincorporated County of San Diego ("County"). Based on the annual average number of demolished units within the City and County, Dolinka Group estimates that the School District may see five (5) SFD units, zero (0) SFA units, and 40 MF units demolished over the next five (5) years and replaced with Future Units. Table H-1 details the projected number of demolished units for the School District over the next five (5) years by jurisdiction.

**Table H-1**
**Projected Demolished Units over the Next Five Years**

| Jurisdiction | SFD Units | SFA Units | MF Units | Total Units |
|---|---|---|---|---|
| School District | 5 | 0 | 40 | 45 |

The Future Units listed in Table 4 of Section III.A include units that could be constructed to take the place of demolished units. To determine the net student enrollment from Future Units, the student generation rates calculated for the School District and described in Section III.A were then applied to the projected demolished units as shown in Table H-1 to determine the potential number of students who could be displaced as a result of demolished residential units. Projected student enrollment from non-mitigated Future Units (Table 8) was then calculated less students displaced from Residential Reconstruction ("Net Projected Student Enrollment"). The Net Projected Student Enrollment is shown in Table H-2.

**Table H-2**
**Projected Student Enrollment**

| School Level | Students Projected from Future Units | Students Projected from Reconstruction | Net Projected Student Enrollment |
|---|---|---|---|
| Elementary School | 320 | 13 | 307 |
| Middle School | 68 | 4 | 64 |
| **Total** | **388** | **17** | **371** |

Utilizing per student costs (Exhibit E), Dolinka Group calculated the total school facilities costs for Net Projected Student Enrollment by school level in order to provide a credit due to the reduced cost impacts of displaced students. The total school facilities costs for Net Projected Student Enrollment are shown in Table H-3.

**Table H-3**
**Net Projected Student Enrollment Total Facilities Cost Impacts (2012$)**

| School Level | Net Projected Student Enrollment | Cost per Student | Total Facilities Cost Impacts |
|---|---|---|---|
| Elementary School | 307 | $42,568 | $13,068,376 |
| Middle School | 64 | $42,568 | $2,724,352 |
| **Total** | **371** | **N/A** | **$15,792,728** |

These cost impacts are less than the total cost impacts as a result of crediting the potential loss of enrollment due to the demolition of existing units. In order to determine the total facilities cost impacts per square foot, Dolinka Group divided the total facilities cost impacts generated from the Net Projected Student Enrollment by the total square footage of assessable space of non-mitigated Future Units, including that which may be a result of Reconstruction (Table 19). Table H-4 shows the total facilities cost impacts per square foot for Net Projected Student Enrollment.

**Table H-4**
**Total Facilities Cost Impacts per Square Foot (2012$)**

| Item | Total Facilities Cost Impacts | Total Square Footage | Total Cost Impact per Square Foot |
|---|---|---|---|
| School District | $15,792,728 | 1,981,323 | $7.97 |

As shown, the total cost impact per square foot in Table H-4 is $7.97, which is greater than the Alternative No. 2 Fee of $2.79 per square foot calculated in the Analysis. It should be noted that the actual cost impact produced by students generated from all non-mitigated Future Units, without consideration of those who have been displaced by Residential Reconstruction is $10.23 per square foot (see Exhibit E). In summary, Residential Reconstruction was considered by reducing the projected number of unhoused students from non-mitigated Future Units by the estimated number of students occupying units projected to be demolished over the next five (5) years. As a result, the number of projected unhoused students was reduced. The cost impact generated from this reduced number of unhoused students was then divided by the total assessable square footage, including that attributable to Residential Reconstruction. Despite reducing impacts by considering existing students living in units to be demolished, the total cost per square foot, as shown in Table H-4, exceeds the Alternative Fees justified in the Analysis. The School District is, therefore, fully justified in levying the Alternative Fees calculated in the Analysis on all non-mitigated Future Units, including those from Residential Reconstruction which may occur over the next five (5) years.

## B. Reconstruction of Commercial/Industrial Construction into Residential Construction

The voluntary demolition of existing commercial/industrial buildings and replacement of them with new residential development is a different category of Reconstruction. Dolinka Group is aware that such types of Reconstruction may occur within the School District over the next five (5) years, however, Dolinka Group was unable to find information (i) about the amount planned within the School District over the next five (5) years or (ii) historical levels, which might indicate the amount to be expected in the future. Due to the lack of information, the School District has decided to evaluate the impacts of Commercial/Industrial Reconstruction projects on a case-by-case basis and will make a determination of whether a fee credit is justified based on the nature of the project.

The fee credit determination will be based upon a comparison of the impacts of the planned residential project and the existing land use category (i.e. retail and services, office, research and development, industrial/warehouse/manufacturing, hospital, or hotel/motel). The actual impacts of the planned residential project (taken from Exhibit E) will be reduced by the impact of the existing commercial/industrial category (derived from calculations contained in the current Commercial/Industrial Development School Fee Justification Study adopted by the School District). Any reduction to the Alternative No. 2 Fee would only occur if the reduced amount falls below the Alternative No. 2 Fee. In such a case, the School District would levy the reduced amount per square foot of new residential construction for the subject Reconstruction project.

# Exhibit I

## School Facilities Capacity Calculation

## San Ysidro School District
### School Facilities Capacity Calculation

| Application | Item | Elementary School | Middle School |
|---|---|---|---|
| N/A | SAB Form 50-02 | 3,062 | 876 |
| N/A | Non-Severe/Severe Capacity | 94 | 27 |
| 50/68379-00-003 | Ocean View Hills Middle | 608 | 459 |
| 50/68379-00-001 | Smythe Elementary | 188 | 0 |
| 50/68379-00-002 | Sunset Elementary | 750 | 0 |
| **Total Capacity** | **N/A** | **4,702** | **1,362** |

# Exhibit J

## Allocation of Surplus Seats

## San Ysidro School District
**Allocation of Surplus Seats**

**Actual and Projected Surplus School Seats from Existing Units**

| Item | School Year 2011/2012 |
|---|---|
| Actual Elementary School Students | 4,093 |
| Existing Elementary School Facilities Capacity | 4,702 |
| **Excess Elementary School Seats** | **609** |
| Actual Middle School Students | 1,177 |
| Existing Middle School Facilities Capacity | 1,362 |
| **Excess Middle School Seats** | **185** |

**Units to be Constructed over the Next Five (5) Years ("Future Units") and Total Units to be Constructed (i.e. Next Five (5) Years + Beyond the Next Five (5) Years) ("Total Units")**

| Item | Number of Future Units | Number of Total Units[1] |
|---|---|---|
| Number of SFD Units | 350 | 1,625 |
| Number of SFA Units | 425 | 3,633 |
| Number of MF Units | 740 | 6,458 |

[1] Source: San Diego Association of Governments ("SANDAG") 2050 Forecasts.

**Percent of Students Generated from Future Units**

| Item | Students Generated from Future Units | Students Generated from Total Units |
|---|---|---|
| Elementary School Students from SFD Units | 186 | 865 |
| Elementary School Students from SFA Units | 116 | 993 |
| Elementary School Students from MF Units | 186 | 1,619 |
| **Total Elementary School Students Generated** | **488** | **3,477** |
| Middle School Students from SFD Units | 48 | 222 |
| Middle School Students from SFA Units | 12 | 101 |
| Middle School Students from MF Units | 58 | 502 |
| **Total Middle School Students Generated** | **118** | **825** |
| **Percent of Elementary School Students Generated from Future Units** | | **14.04%** |
| **Percent of Middle School Students Generated from Future Units** | | **14.30%** |

**Allocation of Excess School Seats to Students Generated from Future Units**

| School Level | Excess Seats | % of Students Generated from Future Units |
|---|---|---|
| Elementary School | 609 | 14.04% |
| Middle School | 185 | 14.30% |
| **Excess Elementary School Seats Allocated Students Generated from Future Units** | | **86** |
| **Excess Middle School Seats Allocated Students Generated from Future Units** | | **26** |

**Number of Non-Mitigated Future Units and Number of Total Future Units**

| Item | Non-Mitigated Future Units | Total Future Units |
|---|---|---|
| Number of SFD Units | 350 | 350 |
| Number of SFA Units | 425 | 425 |
| Number of MF Units | 346 | 740 |

**Percentage of Students Generated from Non-Mitigated Future Units**

| Item | Students Generated from Non-Mitigated Future Units | Students Generated from Total Future Units |
|---|---|---|
| Elementary School Students from SFD Units | 186 | 186 |
| Elementary School Students from SFA Units | 116 | 116 |
| Elementary School Students from MF Units | 87 | 186 |
| **Total Elementary School Students Generated** | **389** | **488** |
| Middle School Students from SFD Units | 48 | 48 |
| Middle School Students from SFA Units | 12 | 12 |
| Middle School Students from MF Units | 27 | 58 |
| **Total Middle School Students Generated** | **87** | **118** |
| **Percent of Elementary School Students Generated from Non-Mitigated Future Units** | | **79.71%** |
| **Percent of Middle School Students Generated from Non-Mitigated Future Units** | | **73.73%** |

**Allocation of Excess Seats to Students Generated from Non-Mitigated Future Units**

| School Level | Excess Seats | % of Students Generated from Non-Mitigated Future Units |
|---|---|---|
| Elementary School | 86 | 79.71% |
| Middle School | 26 | 73.73% |
| **Excess Seats Allocated to Elementary School Students** | | **69** |
| **Excess Seats Allocated to Middle School Students** | | **19** |

# Exhibit K

## Surplus Site Determination

Section 65995.6(b)(1) requires the School District to identify and consider any surplus property owned by the School District that may be used as a school site or that is available for sale to finance school facilities. The School District has identified one (1) site that may fall into this category.

**1. <u>Vista del Mar Site</u>**

The site is an 18.62 acre site where Vista del Mar Elementary School is currently under construction. Based on the per-acre site acquisition costs utilized in the Analysis, the value the Vista del Mar site is estimated to be $2,271,638.

According to information obtained from SANDAG, the School District can expect an additional 10,201 units to be constructed within its boundaries beyond the next five (5) years. Using student generation rates ("SGRs") identified in Section III.A of the School Facilities Needs Analysis ("Analysis"), 3,696 students are expected to be generated by units constructed beyond the next five (5) years. As shown in Table 4, 476 students will be generated by non-mitigated Future Units. The percentage of students generated by non-mitigated Future Units versus the number students generated by units constructed beyond the next five (5) years is approximately 11.08 percent. By apportioning 11.08 percent of the value of the Vista del Mar site between non-mitigated Future Units and units constructed beyond the next five (5) years results in $251,348 of the site value allocated to non-mitigated Future Units. It was determined that $251,348 of the site value represents the total amount that can reduce the impact of projected unhoused students generated from non-mitigated Future Units. This potential funding will be discussed further in Exhibit L.

# Exhibit L

## Identification and Consideration of Local Funding Sources per Section 65995.5(c)(2)and Section 65995.6(b)(3)

Section 65995.6(b)(3) requires the School District to identify and consider any local sources other than fees, charges, dedications, or other requirements that can be used to offset the cost impacts of Future Units. Additionally, Section 65995.5(c)(2) requires the School District to subtract the amount of Local Funds, which includes commercial/industrial school fees, that the governing board has dedicated to facilities necessitated by Future Units. What follows is a summary of potential local sources, including Local Funds that were evaluated for reducing such impact.

**1. <u>Lease Financings</u>**

Lease financings are a means of financing facilities through a pledge of lease payments, as opposed to a new revenue source, i.e., Certificates of Participation ("COPs"), Lease Revenue Bonds ("LRBs"), etc. All lease payments associated with lease financings must be paid by the issuing school district through its existing sources of revenue. The lease payments are secured by the issuing school district's general fund.

On January 31, 2012 the School District issued its 2012 COPs in the amount of $10,409,714.55. These COPs were issued to help fund the acquisition, construction, furnishing, equipping, and completion of Vista del Mar Elementary School as well as the acquisition, construction, renovation, improvement, furnishing, equipping, delivery, and installation of new construction and modernization projects. Due to the fact that these school facilities will house students generated beyond the five (5) year range of the Analysis, the $10,409,714.55 identified above was apportioned between students generated from non-mitigated Future Units and students to be generated beyond the next five (5) years. It was determined that, at this time, $1,151,795 is available to house students generated from non-mitigated Future Units over the next five (5).

**2. <u>General Obligation Bonds</u>**

General Obligation ("GO") bonds are secured by the full faith, credit and taxing power of the issuing school district. A GO bond constitutes debts of the issuer and generally requires 2/3 approval by election prior to issuance; however, a Proposition 39 GO bond is approved by 55 percent of the votes. In return for a lower voter approval threshold under Proposition 39, the issuing school district (i) must identify a specific list of school facility projects, (ii) has limitations on the rate of maximum tax levy, and (iii) upon approval, the expenditures are monitored and audited by a citizens' oversight committee annually. Voter approval grants the school district the right to levy additional *ad valorem* taxes on all taxable property within its jurisdiction in order to pay debt service on the GO bonds.

On March 4, 1997 the voters of the School District approved and authorized the issuance of $250,000,000 in GO bonds. Of the $250,000,000 in GO bonds authorized, the School District has previously issued the General Obligation Bonds, 1997 Election, Series A in the amount of $10,590,000.00, the General Obligation Bonds, 1997 Election, Series B in the amount of $9,885,000.00, the General Obligation Bonds, 1997 Election, Series C in the amount of $15,875,000.00, the General Obligation Bonds, 1997 Election, Series D in the amount of $24,619,362.80, and the General Obligation Bonds, 1997 Election, Series E in the amount of $33,952,740.90. The proceeds from these GO bonds have been used (i) to enhance current facilities for the School District's existing students, (ii) to modernize existing school facilities, and (iii) to construct new schools to house students generated from existing residential units.

On June 28, 2011 the School District issued the General Obligation Bonds, 1997 Election, Series F in the amount of $17,599,622.90. These bonds were issued to help fund the renovation and modernization of Beyer Elementary School as well as for the acquisition, construction, and completion of Vista del Mar Elementary School. Due to the fact that these school facilities will house students generated beyond the five (5) year range of the Analysis, the $17,599,622.90 identified above was apportioned between students generated from non-mitigated Future Units and students to be generated beyond the next five (5) years. It was determined that, at this time, $1,947,332 is available to house students generated from Future Units over the next five (5).

Of the original $250,000,000 in GO bonds authorized by the voters of the School District, the School District has issued $112,521,727.60. The School District still has $137,478,273.40 in available GO bond authorization.

## 3. Redevelopment Pass-Throughs

California redevelopment law allows school districts to share in tax increment income via pass-through agreements with local redevelopment agencies. However, school districts cannot unilaterally establish redevelopment project areas and the revenues school districts may obtain from redevelopment pass-throughs are generally limited.

The School District currently has pass-through agreements with the City of San Diego. Over the last five (5) years, the School District has collected approximately $1,168,364 in redevelopment revenue from these pass through agreements. A similar amount of redevelopment revenue can be expected to be received over the next five (5) years. At this time, $1,168,364 is considered to be available as potential funding for school facilities to house students generated from Future Units.

## 4. Community Facilities Districts

The Mello-Roos Community Facilities Act provides an alternative method for public agencies to fund facilities with useful lives of five (5) years or more. The Community Facilities District ("CFD") is a financing entity through which a local government is authorized to levy special taxes to pay debt service on issued bonds or to pay for the direct construction of facilities. A two-thirds vote of the qualified voters is required to form the CFD.

The School District has three (3) CFDs. These CFDs were formed on specific residential development projects as an alternative to paying mitigation payments. Accordingly, none of the special tax or bond proceeds from these CFDs will be available to offset the cost impacts of any residential units constructed outside the boundaries of the CFDs. Similarly, the School District will not be permitted to collect additional statutory school fees, mitigation payments or Alternative Fees from the units located within the CFDs, nor were the units from the CFDs considered in calculating the Alternative No. 2 and Alternative No. 3 Fees.

## 5. School Fees

Sections 17620 *et seq.* of the Education Code gives school districts the authority to collect statutory school fees ("School Fees") from commercial and industrial development if a justification study is prepared and certain nexus findings are made. Section 65995.5(c)(2) requires the School District to identify and consider Local Funds, which includes commercial/industrial School Fees, and to subtract such funds from the total impact created by Future Units, if such Local Funds are available.

The School District currently collects such fees in the amount of $0.29 per square foot. In the previous five (5) years, the School District collected approximately $529,885 in School Fees from commercial/industrial development. A similar amount of commercial/industrial School Fees can be expected to be received over the following five (5) years. This potential funding will be discussed further below.

## 6. Identification of Existing Surplus Local Funds

Over the next five (5) years, the School District will need to construct school facilities to house students to be generated from Future Units. Using per-student costs calculated in Exhibit E, providing adequate school facilities to the 388 Projected Unhoused Students identified in Section III.C will have a cost of $16,516,384. Table L-1 shows a summary of the school facilities needs of the School District.

**Table L-1**
**Identification of School Facilities Needs (2012$)**

| Item | Amount |
|---|---|
| Future Unhoused Student Impact | $16,516,384 |

As stated above, the School District has identified the following local funds: (i) $1,151,795 in available COPs proceeds (ii) $1,947,332 in available GO Bond Proceeds, (iii) a potential for $1,168,364 in funding from redevelopment pass-through agreements, (iv) potential commercial/industrial school fees in the amount of $529,885, and (v) a potential value of surplus sites in the amount of $251,348. In addition, the School District also plans to pursue State funding for the construction of school facilities to adequately house students generated from existing residential development and Future Units. Based on the current per-pupil grant amounts established by the State and the School District's site costs, 388 Projected Unhoused Students would generate $5,947,939 in State funding. Additionally, based on Table 16 of the Analysis, the School District can expect to receive $5,947,939 from Alternative No. 2 Fees on new residential development. Table L-2 summarizes potential funding sources to fund the school facilities needs identified in Table L-1.

**Table L-2**
**Identification of Local Funds (2012$)**

| Item | Amount |
|---|---|
| Available COPs Proceeds | $1,151,795 |
| Available GO Bond Proceeds | $1,947,332 |
| Projected Redevelopment Revenues | $1,168,364 |
| Projected Commercial/Industrial School Fees | $529,885 |
| Potential Value of Surplus School Sites | $251,348 |
| State Funding for Projected Unhoused Students | $5,947,939 |
| Projected Alternative No. 2 Fees | $5,947,939 |
| **Total** | **$16,944,602** |

As shown below in L-3, when considering the current and future school needs of the School District, there is currently a $428,218 funding credit. Therefore, the School District does have surplus funds available to offset the cost impact of non-mitigated Future Units.

**Table L-3**
**Identification of Funding Credit (2012$)**

| **Item** | **Amount** |
|---|---|
| School Facilities Needs | $16,516,384 |
| Local Funding Sources | ($16,944,602) |
| **Remaining Funding Credit** | **($428,218)** |

# Exhibit M

## Calculation of Additional Grants for General Site Development

# San Ysidro School District
## General Site Development Grant per Student Calculation

### 1. Calculation of Additional Grant Amount as a percentage of Base Per-Pupil Grant at Each School Level

| School Level | Base Per-Pupil Grant [1] | Percent | Additional Grant |
|---|---|---|---|
| Elementary School | $9,625 | 6.00% | $578 |
| Middle School | $10,204 | 6.00% | $612 |

[1] Includes Automatic Fire Detection/Sprinkler Grant.

### 2a. Calculation of Total Grant Amount for a New School Facility

| School Level | Grant per New Usable Acre | Site Size | Grant per School Facility |
|---|---|---|---|
| K-8 School | $15,365 | 15.9 | $244,304 |

### 2b. Calculation of Grant Amount per Student

| School Level | Grant per School Facility | Facility Capacity | Grant per Student |
|---|---|---|---|
| K-8 School | $244,304 | 850 | $287 |

### 3. Determination of Total Grant per Student for General Site Development at Each School Level

| School Level | Additional Grant as a percentage of Base Per-Pupil Grant | Grant per Student | Total Grant for General Site Development |
|---|---|---|---|
| Elementary School | $578 | $287 | $865 |
| Middle School | $612 | $287 | $899 |