



LA MESA-SPRING VALLEY SCHOOL DISTRICT

**2021 SCHOOL FEE JUSTIFICATION STUDY**

AUGUST 18, 2021

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## EXECUTIVE SUMMARY

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

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

The maximum School Fees authorized by Education Code Section 17620 are currently \$4.08 per square foot for residential construction/reconstruction and \$0.66 per square foot for commercial/industrial construction for unified school districts. The State Allocation Board (“SAB”) reviews and may adjust the maximum authorized School Fees every January in even-numbered years.

The School District provides education for grades transitional kindergarten (TK) through 8. Pursuant to Education Code Section 17623(a), the School District, as a nonunified school district sharing common jurisdiction with other nonunified school district(s), entered into a school facilities fee allocation agreement with the Grossmont Union High School District. The agreement specifies the percentage of the maximum School Fees that may be levied and collected by each school district. According to the agreement, sixty two percent (62%) of the maximum School Fees may be charged and collected by the School District, or \$2.53 and \$0.41 for residential and commercial/industrial development, respectively (“Applicable School Fees”). Based on the findings presented in this Study, the School District is justified in collecting its portion of the maximum residential and commercial/industrial School Fees. The findings are summarized as follows:

### **RESIDENTIAL DEVELOPMENT**

New residential development in the School District is projected over the next ten (10) years and beyond. Based on historical student generation rates, new residential development could generate an estimated 184 new students over the next ten (10) years. Based on the School District’s existing and projected school facilities capacity and enrollment, the projected student enrollment supports the need for the construction, reconstruction and refurbishment of school facilities at existing sites.

The cost impacts per square foot of residential construction/reconstruction shown in Table E-1 are greater than the School District’s share of the current maximum authorized

residential School Fee, which is \$2.53 per square foot; therefore, the School District is reasonably justified in levying Applicable School Fees on new residential development.

**TABLE E-1**  
**RESIDENTIAL SCHOOL FACILITIES COST IMPACTS/  
APPLICABLE SCHOOL FEE PER SQUARE FOOT**

<b>IMPACT PER SQUARE FOOT</b>	<b>APPLICABLE RESIDENTIAL SCHOOL FEE PER SQUARE FOOT</b>
<b>\$5.13</b>	<b>\$2.53</b>

### **COMMERCIAL/INDUSTRIAL DEVELOPMENT**

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

Section 17621(e)(1)(B) of the Education Code requires that the Study determine the impact of the increased number of employees anticipated to result from commercial/industrial development upon the cost of providing school facilities within the School District. This code section further recommends that employee generation estimates be based on the applicable employee generation estimates set forth in the January 1990 edition of "San Diego Traffic Generator Study" ("Traffic Study"), a report by San Diego Association of Governments ("SANDAG"). The school facilities cost impacts per commercial/industrial square foot as determined in this Study are shown in Table E-2 by commercial/industrial land use type (each commercial/industrial category is further described in Appendix "A"). The cost impacts per square foot for each category of commercial/industrial development are equal to or exceed the maximum authorized School Fee of \$0.41 per square foot, except for Rental Self-Storage development. Therefore, the School District is justified in levying commercial/industrial School Fees on new commercial/industrial development in an amount up to but not exceeding the maximum authorized School Fee of \$0.41 per square foot ("Applicable Commercial/Industrial School Fees"). The Applicable Commercial/Industrial School Fees may be imposed on new commercial/industrial construction or reconstruction classified as Rental Self-Storage up to the respective net cost impact per square foot determined herein.

**TABLE E-2**  
**COMMERCIAL/INDUSTRIAL SCHOOL FACILITIES COST IMPACTS/**  
**APPLICABLE SCHOOL FEE PER SQUARE FOOT**

COMMERCIAL/INDUSTRIAL CATEGORY	IMPACT PER SQUARE FOOT	APPLICABLE SCHOOL FEE PER SQUARE FOOT
Banks	<b>\$1.83</b>	<b>\$0.41</b>
Community Shopping Center	<b>\$1.00</b>	<b>\$0.41</b>
Neighborhood Shopping Center	<b>\$1.82</b>	<b>\$0.41</b>
Industrial Business Parks	<b>\$2.28</b>	<b>\$0.41</b>
Industrial Parks/Warehousing/Manufacturing	<b>\$0.87</b>	<b>\$0.41</b>
Rental Self-Storage	<b>\$0.04</b>	<b>\$0.04</b>
Research & Development	<b>\$1.97</b>	<b>\$0.41</b>
Hospitality (Lodging)	<b>\$0.74</b>	<b>\$0.41</b>
Commercial Offices (Standard)	<b>\$3.11</b>	<b>\$0.41</b>
Commercial Offices (Large High Rise)	<b>\$2.95</b>	<b>\$0.41</b>
Corporate Offices	<b>\$1.74</b>	<b>\$0.41</b>
Medical Offices	<b>\$2.77</b>	<b>\$0.41</b>

## SECTION I. LEGISLATION AND LEGAL REQUIREMENTS

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

### A. LEGISLATIVE HISTORY

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

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

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

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

SB 50 also limited the power of cities and counties to require mitigation of school facilities impacts specifically as they relate to the capacity of schools as a condition of approving new development. Prior case law permitted school districts to collect mitigation fees greater than the statutory amount in order to address school capacity.

On November 5, 2002, California voters passed Proposition 47, which authorized the issuance of \$13.05 billion in State bonds and also enacted AB 16, which provided for additional reformation of the School Building Program. AB 16, among other items, clarified that if the SAB is no longer approving apportionments for new construction due to the lack

of funds available for new school facilities construction, a school district may increase its Level II Fee to the Level III Fee. With the issuance of the State bonds authorized by the passage of Proposition 47, this section of AB 16 became inoperable.

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

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

## **SECTION II. PROJECTED UNHOUSED STUDENTS AND FACILITY REQUIREMENTS**

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

### **A. SCHOOL DISTRICT CAPACITY AND CURRENT STUDENT ENROLLMENT**

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

The School District currently operates sixteen (16) elementary schools (grades TK-6), two (2) middle schools (grades 7-8), one (1) literacy academy (grades TK-6) and two (2) specialty academies (grades 4-8). Applying the provisions of Education Code Section 17071.10, these facilities have a capacity to accommodate 13,892 students. Education Code Section 17071.30 and SAB Regulation 1859.51 omit portable classrooms in the calculation to the extent they are (i) leased through the State Relocatable Classroom Program, (ii) leased for a period of less than five (5) years, (iii) leased when needed as interim housing (project basis), or (iv) represent the number of portables that exceed 25% of the School District's permanent classrooms. In accordance with the SAB Regulations, school capacities are determined based on loading factors of 25 students per classroom for grades TK through 6 and 27 students per classroom for grades 7 and 8, and 13 non-severe and 9 severe students per classroom for those students enrolled in special education. Appendix "B" provides a calculation of the existing facilities capacity.

Based on enrollment information as of October 2020, the total student enrollment of the School District is 11,196 students. A summary of the student enrollment data is included in Appendix "C". Available facilities capacity is calculated by subtracting the October 2020 student enrollment from existing school facilities capacity for each school level. This operation results in available capacity at the elementary school and middle school levels. The capacity calculation is shown in Table 1.



**TABLE 1**  
**FACILITIES CAPACITY AND STUDENT ENROLLMENT**

SCHOOL LEVEL	FACILITIES CAPACITY	STUDENT ENROLLMENT (OCTOBER 2020)	AVAILABLE/ (DEFICIT) CAPACITY
Elementary School (TK-6)	9,366	8,677	689
Middle School (7-8)	4,526	2,519	2,007
<b>TOTAL</b>	<b>13,892</b>	<b>11,196</b>	<b>2,696</b>

## **B. PROJECTED UNHOUSED STUDENTS**

### **1. Projected Residential Units**

To estimate the projected units, Koppel & Gruber Public Finance (“K&G Public Finance”) utilized information from the Planning Departments from the Cities of El Cajon, La Mesa and San Diego as well as the County of San Diego Planning Department (collectively the “Planning Agencies”), including, but not limited to: (i) a list of residential projects planned, approved and under construction and (ii) building permit records. Such information was used to project residential development by housing type. Based on the information, it is estimated the School District could experience the development of an estimated 952 residential units over the next ten (10) years (“Projected Units”).

The determination of the Projected Units is summarized by residential category in Table 2. The types of residential units considered include (i) single family detached (“SFD”), (ii) single family attached (“SFA”), and (iii) multi-family units (“MF”). Units classified as SFD are those units with no common walls; SFA are those units sharing a common wall each having a separate and unique assessor’s parcel (e.g. townhouses, condominiums, etc.); and MF are those units which share a single assessor’s parcel and share a common wall (e.g. apartments, duplexes, etc.).

**TABLE 2**  
**PROJECTED UNITS BY RESIDENTIAL CATEGORY**

RESIDENTIAL CATEGORY	TOTAL PROJECTED UNITS
Single-Family Detached (SFD)	366
Single-Family Attached (SFA)	120
Multi-Family (MF)	466
<b>TOTAL</b>	<b>952</b>

## 2. Student Generation Rates

In order to calculate student generation rates (“SGRs”), K&G Public Finance first obtained property characteristic data from the County Assessor’s Office. Parcels in the data file were classified by unit type (SFD, SFA and MF) and residential parcels were extracted. Since the property data information obtained from the County was missing unit counts for many of the residential parcels contained therein, K&G Public Finance relied on housing information derived from U.S. Census Bureau data<sup>1</sup> to estimate the total number of residential units located within the School District. According to the U.S. Census Bureau data, a total of 28,878 SFDs, 2,895 SFAs and 17,378 MFs are located within the boundaries of the School District.

K&G Public Finance then obtained a student database from the School District, which contained the school attended, grade level and physical address information for each student enrolled in the School District. The student database is reflective of student enrollment information as of October 2020. The student enrollment address information was matched to the address (situs address) information of parcels in the County property characteristic database. The number of students matched was then queried by school level and residential category. Students could not be matched if they were inter-district or they did not have a valid physical address (e.g. only P.O. Box was listed). Mobile homes are not considered in the SGR determination, including the students matched to the mobile home land use, and therefore have been omitted<sup>2</sup>. Table 3 below summarizes the calculation of the SGRs by residential category:

**TABLE 3**  
**STUDENT GENERATION RATES**

SCHOOL LEVEL	SFD UNITS	SFA UNITS	MF UNITS
Elementary School (TK-6)	0.1510	0.2663	0.1251
Middle School (7-8)	0.0420	0.0653	0.0353
<b>TOTAL</b>	<b>0.1930</b>	<b>0.3316</b>	<b>0.1604</b>

## 3. Projected Student Enrollment

Projected student enrollment was determined by multiplying the SGRs in Table 3 by the number of Projected Units shown in Table 2. A total of 184 students are estimated to be generated from Projected Units. The projected student enrollment is summarized by school level in Table 4.

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<sup>1</sup> 2015-2019 American Community Survey 5-Year Estimates; DP04 – Selected Housing.

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

**TABLE 4**  
**PROJECTED STUDENT ENROLLMENT FROM NEW HOUSING**  
**BY SCHOOL LEVEL**

SCHOOL LEVEL	TOTAL PROJECTED STUDENT ENROLLMENT
Elementary School (TK-6)	145
Middle School (7-8)	39
<b>TOTAL</b>	<b>184</b>

#### **4. Projected Unhoused Students**

As shown in Table 1, existing facilities capacity exceeds enrollment at the elementary school and middle school levels based on current student enrollment and existing facilities capacity on a School District-wide basis. The available seats exist at facilities that will house projected student enrollment from Projected Units within the projection timeframe of this Study (10 years) and beyond.

In April 2020, a Facilities Master Plan was completed by Harley Ellis Devereaux (“HED”) for the School District which identifies the facilities needs of the School District and focuses on capital improvements that are necessary to provide adequate housing and the continued use of the School District’s existing facilities through the modernization or the reconstruction of such facilities and to meet the education goals of the School District (the “Facilities Master Plan”). In developing the Facilities Master Plan, a Student Population Projections Revision for school years 2020 through 2029 was completed by Davis Demographics and Planning for the School District and presents historical student enrollment information and a forecast of student enrollment through 2029 (the “2020 Forecast”). Per findings made in the 2020 Forecast, the School District’s student enrollment could experience an overall decline to a total student population of approximately 11,534 students by 2029. The projections indicate modest declining enrollment at the elementary level and relatively stable and unchanged enrollment at the middle school level. Should the changes in total enrollment persist in a slightly downward trajectory as projected in the 2020 Forecast, the number of available seats could increase given current facilities capacity.

While these findings indicate the School District’s collective capacity per school level is available to accommodate projected students from new development over the course of the planning period, the analysis doesn’t consider (i) the availability of capacity within areas of the School District where a greater and disproportionate amount of new development is expected (ii) the condition and adequacy of existing capacity, (iii) the service and educational goals of the School District.

As further described in this Study, capital improvements are necessary for the long-term use to adequately house the existing student population and future enrollment from new housing at all school levels. The facilities needs exist regardless of the availability of

capacity to house student enrollment, inclusive of student enrollment generated from new development. Therefore, for the purpose of this analysis, projected student enrollment from Projected Units (“Projected Student Enrollment”) as identified in Table 4, has not been adjusted by available capacity and student enrollment attributable to new housing that requires a seat (facilities), including new facilities and/or facilities to be reconstructed for their continued useful life (“Projected Unhoused Students”) is equal to Projected Student Enrollment. Table 5 shows the number of Projected Unhoused Students at each school level.

**TABLE 5**  
**PROJECTED UNHOUSED STUDENTS**

SCHOOL LEVEL	PROJECTED STUDENT ENROLLMENT	AVAILABLE SEAT ADJUSTMENT	PROJECTED UNHOUSED STUDENTS
Elementary School (TK-6)	145	0	145
Middle School (7-8)	39	0	39
<b>TOTAL</b>	<b>184</b>	<b>0</b>	<b>184</b>

## **C. FACILITY COSTS AND ESTIMATED PER STUDENT COST**

### **1. Facilities Costs**

Government Code Section 66001 (g) allows School Fees to include the costs attributable to the increased demand for public facilities reasonably related to the development project(s) in which the fee is imposed in order to (1) refurbish existing facilities to maintain the existing level of service or (2) achieve an adopted level of service that is consistent with a general plan. As previously mentioned in this Study, the Facilities Master Plan identified the facilities needs of the School District, and focuses on improvements that are necessary to provide adequate housing and the continued use of the School District’s existing facilities through the modernization or the reconstruction of such facilities and to meet the educational goals of the School District. The Facilities Master Plan also provided an estimate of the costs to fund the proposed improvement projects, which amounted to \$986,170,560 in 2020 dollars. State law does not allow school fees to be expended for regular maintenance, routine repair, deferred maintenance or to correct existing deficiencies. For the purposes of this Study, and to effectively demonstrate the demand for facilities created by new development projects, only the costs identified in the Facilities Master Plan that most align with the provisions of Government Code 66001 (g) were considered, including costs for the demolition and replacement of existing facilities, new construction, infrastructure improvements and interim housing. The eligible costs amount to \$386,841,463 in 2020 dollars and are summarized in Table 6 by school level.

**TABLE 6**  
**ESTIMATED FACILITIES COSTS PER SCHOOL LEVEL**

SCHOOL LEVEL <sup>1</sup>	SCHOOL SITE & CONSTRUCTION COSTS <sup>2</sup>	ANCILLARY COSTS <sup>2,3</sup>	TOTAL SITE COSTS
Elementary School (TK-6)	\$288,775,015	\$29,608,873	\$318,383,888
Middle School (7-8)	\$57,304,848	\$11,152,727	\$68,457,575
<b>TOTAL</b>	<b>\$346,079,863</b>	<b>\$40,761,600</b>	<b>\$386,841,463</b>

<sup>1</sup> Facilities Master Plan

<sup>2</sup> Includes demolition, new construction, infrastructure and interim housing costs.

<sup>3</sup> Represents capital improvement costs at the School District's central and support centers. Costs were allocated by school level based on projected facilities capacity.

The primary source of funding for the projects, described in the Facilities Master Plan, is expected from general obligation bond sales issued under the School District's Measure V bond authorization. Measure V was a local bond measure approved by the voters on November 3, 2020 and authorized the School District to issue up to \$136,000,000 in general obligation bonds to finance capital improvement projects throughout the School District ("Measure V Authorization"). On August 12, 2021, the School District issued the first series of bonds under the Measure V Authorization, "General Obligation Bonds 2020 Election, 2021 Series A" in the amount of \$48,000,000.

The Facilities Master Plan demonstrates capital improvement projects are necessary for the long-term use and adequate housing of student enrollment at the School District's existing facilities. The facilities needs exist regardless of the availability of capacity to house student enrollment, inclusive of student enrollment generated from new development; therefore, facilities capacity available for Projected Student Enrollment is deemed inadequate. Revenues from the imposition the Applicable School Fees are intended (i) to help bridge the funding gap between (a) monies available from general obligation bond proceeds, including funding from the Measure V Authorization, potential State funding or other sources, and (b) the remaining estimated costs of the capital improvement projects outlined in the Facilities Master Plan and (ii) other project costs not specified in the Facilities Master Plan.

## **2. Estimated Cost per Student**

The estimated cost per student to provide adequate school facilities to house Projected Unhoused Students was derived from the estimated costs of projects at specific school sites and targeted classroom facilities as outlined in the Facilities Master Plan. The total eligible costs shown in Table 6 were then divided by the targeted facilities capacities to determine the total Cost per Student/Seat. This determination is shown in Table 7.

**TABLE 7**  
**FACILITIES COST IMPACT PER SEAT/STUDENT**

SCHOOL LEVEL	TOTAL ESTIMATED SCHOOL FACILITIES COST	TARGETED FACILITIES CAPACITY <sup>1</sup>	TOTAL FACILITIES COST IMPACT PER SEAT/STUDENT
Elementary School (TK-6)	\$318,383,888	9,515	\$33,461
Middle School (7-8)	\$68,457,575	3,584	\$19,101

<sup>1</sup> Based on the estimated 2029 classroom counts identified in the Facilities Master Plan and application of the provisions set forth under Education Code Section 17071.10, which assume State standard classroom loading factors and certain adjustments for portable classrooms. Additional detail regarding the targeted facilities capacity computation is included in Appendix “B”. It should be noted while the ten-year scope of this Study extends beyond 2029, these estimates are deemed reasonable for the purposes of this analysis.

### SECTION III. PROJECTED IMPACT OF RESIDENTIAL DEVELOPMENT

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The following section presents the school facility impact analysis for new residential development and provides a step-by-step calculation of the estimated per residential square foot cost impact.

The proposed capital improvement projects outlined in the Facilities Master Plan are recommended because the existing facilities require upgrade or replacement for their continued long-term use, and such improvements will benefit both existing student enrollment and student enrollment generated as a result of new residential construction; thus, it is deemed reasonable and appropriate to include estimated costs as described in Section II.C when evaluating the impact per square foot as a result of Projected Unhoused Students.

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

**TABLE 8**  
**TOTAL FACILITIES COST IMPACT**

SCHOOL LEVEL	PROJECTED UNHOUSED STUDENTS	FACILITIES COST IMPACT PER SEAT/STUDENT	TOTAL FACILITIES COST IMPACT
Elementary School (TK-6)	145	\$33,461	\$4,851,845
Middle School (7-8)	39	\$19,101	\$744,939
TOTAL			<b>\$5,596,784</b>

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

**TABLE 9**  
**SCHOOL FACILITIES COST PER RESIDENTIAL UNIT**

TOTAL FACILITIES COST IMPACT	PROJECTED UNITS	FACILITIES COST IMPACT PER RESIDENTIAL UNIT
\$5,596,784	952	<b>\$5,879</b>

The school facilities cost impact per residential square foot was calculated by dividing the school facilities cost per residential unit determined in Table 9 by the weighted average square footage of each residential unit type. This calculation is shown in Table 10. A review of historical development records from the Planning Agencies, including parcel attribute data, building permit records and additional detail as requested, was used to estimate the weighted average square footage.

**TABLE 10**  
**SCHOOL FACILITIES COST PER RESIDENTIAL SQUARE FOOT**

FACILITIES COST IMPACT PER RESIDENTIAL UNIT	WEIGHTED AVERAGE SQUARE FOOTAGE	FACILITIES COST PER RESIDENTIAL SQUARE FOOT
\$5,879	1,147	<b>\$5.13</b>

The school facilities impact per residential square foot determined in Table 10 is greater than the School District's share of the current maximum authorized residential School Fees of \$2.53 per square foot; therefore, the School District is justified in levying up to but not exceeding the maximum authorized amount for residential construction and reconstruction.



## SECTION IV. COMMERCIAL/INDUSTRIAL SCHOOL IMPACT ANALYSIS

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

### A. EMPLOYEE GENERATION

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

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

**TABLE 11**  
**EMPLOYEE GENERATION PER 1,000 SQUARE FEET**  
**OF COMMERCIAL/INDUSTRIAL DEVELOPMENT**

COMMERCIAL/INDUSTRIAL CATEGORY	AVERAGE SQUARE FOOTAGE PER EMPLOYEE	EMPLOYEES PER 1,000 SQUARE FEET
Banks	354	2.8253
Community Shopping Center	652	1.5348
Neighborhood Shopping Center	357	2.7985
Industrial Business Parks	284	3.5156
Industrial Parks/Warehousing/Manufacturing	742	1.3473
Rental Self-Storage	15,541	0.0643
Research & Development	329	3.0408
Hospitality (Lodging)	883	1.1325
Commercial Offices (Standard)	209	4.7897
Commercial Offices (Large High Rise)	220	4.5442
Corporate Offices	372	2.6848
Medical Offices	234	4.2654

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

## B. RESIDENTIAL IMPACT

### 1. Households

To evaluate the impact of commercial/industrial development on School District facilities, the employee generation estimates listed in Table 11 above were first used to determine the impact of commercial/industrial development on a per household basis. Based on information provided by the U.S. Census Bureau<sup>3</sup>, there are approximately 1.33 employed persons per household on average for households located within the School District. Dividing the employee generation estimates listed in Table 11 above by 1.33 results in the estimated number of households per 1,000 square feet of commercial/industrial development (“Total Household Impact”).

The Total Household Impact determined in the preceding paragraph takes into consideration all employees generated from commercial/industrial development. Since some of those employees will live outside the School District, and will therefore have no impact on the School District, the figures are adjusted to reflect only those households within the School District occupied by employees generated from commercial/industrial development built within the School District. Based on information derived from U.S. Census Bureau data<sup>4</sup>, it is estimated that approximately 12.6% of employees both live and work within the School District. Multiplying the Total Household Impact by 12.6% results in the households within the School District impacted per 1,000 square feet commercial/industrial development. The results of these computations are shown in Table 12.

**TABLE 12**  
**IMPACT OF COMMERCIAL/INDUSTRIAL DEVELOPMENT ON**  
**HOUSEHOLDS WITHIN THE SCHOOL DISTRICT**

COMMERCIAL/INDUSTRIAL CATEGORY	SCHOOL DISTRICT HOUSEHOLDS PER 1,000 SQUARE FEET COM./IND.
Banks	0.2677
Community Shopping Center	0.1454
Neighborhood Shopping Center	0.2651
Industrial Business Parks	0.3331
Industrial Parks/Warehousing/Manufacturing	0.1276
Rental Self-Storage	0.0061
Research & Development	0.2881
Hospitality (Lodging)	0.1073
Commercial Offices (Standard)	0.4538
Commercial Offices (Large High Rise)	0.4305
Corporate Offices	0.2543
Medical Offices	0.4041

<sup>3</sup> US Census Bureau- 2019 ACS 5 Year Commuting Characteristics by Sex (S0801) and Demographic Characteristics for Occupied Housing Units (S2502)

<sup>4</sup> US Census Bureau- 2019 ACS 5 Year Commuting Characteristics by Sex (S0801)

## 2. New Household Student Generation

The student generation impacts per 1,000 square feet of commercial/industrial development were calculated by multiplying the household impacts shown in Table 12 by blended student generation rates determined for each school level. The result of this calculation is shown in Table 13. The blended student generation rates are based on the SGRs summarized in Table 3 and were combined into a single rate per school level based on the proportionate number of each type of residential unit anticipated to be constructed in the School District as shown in Table 2. The determination of the blended student generation rates is shown and described in Appendix “D” of this Study.

**TABLE 13**  
**SCHOOL FACILITIES COSTS PER 1,000 SQUARE FEET OF**  
**COMMERCIAL/INDUSTRIAL DEVELOPMENT**

COMMERCIAL/INDUSTRIAL CATEGORY	ELEMENTARY SCHOOL STUDENT GENERATION	MIDDLE SCHOOL STUDENT GENERATION	TOTAL STUDENT GENERATION
Banks	0.0409	0.0112	0.0521
Community Shopping Center	0.0222	0.0061	0.0283
Neighborhood Shopping Center	0.0405	0.0111	0.0516
Industrial Business Parks	0.0509	0.0139	0.0648
Industrial Parks/Warehousing/Manufacturing	0.0195	0.0053	0.0248
Rental Self-Storage	0.0009	0.0003	0.0012
Research & Development	0.0441	0.012	0.0561
Hospitality (Lodging)	0.0164	0.0045	0.0209
Commercial Offices (Standard)	0.0694	0.0189	0.0883
Commercial Offices (Large High Rise)	0.0658	0.018	0.0838
Corporate Offices	0.0389	0.0106	0.0495
Medical Offices	0.0618	0.0169	0.0787

## 3. Inter-District Student Impact

Based on information provided by the School District, 893 students were enrolled at the School District on an inter-district basis as of October 2020, including 509 students at the elementary school level and 384 students at the middle school level. Many of those inter-district students attend the School District as a result of their parents or guardians being employed at businesses located within the School District boundaries. To determine the inter-district impact of new commercial/industrial development, the number of inter-district students at each school level was first divided by the estimated number of employees within the School District’s area. Employment was estimated at 66,945<sup>5</sup> based on data obtained from the U.S. Census Bureau. The ratio of inter-district students to estimated employment for each school level was then multiplied by the employee generation factors for each of the commercial/industrial categories as shown

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<sup>5</sup> US Census Bureau- 2019 ACS 5 Year Economic Characteristics (DP03)

in Table 11. The calculation results in the Inter-District Student Impacts shown in Table 14.

**TABLE 14**  
**INTER-DISTRICT COST IMPACT PER 1,000 SQUARE FEET OF**  
**COMMERCIAL/INDUSTRIAL DEVELOPMENT**

COMMERCIAL/INDUSTRIAL CATEGORY	ELEMENTARY SCHOOL COST IMPACT	MIDDLE SCHOOL COST IMPACT	TOTAL INTER- DISTRICT COST IMPACT
Banks	0.0215	0.0161	0.0376
Community Shopping Center	0.0117	0.0087	0.0204
Neighborhood Shopping Center	0.0213	0.0160	0.0373
Industrial Business Parks	0.0267	0.0200	0.0467
Industrial/Warehousing/Manufacturing	0.0102	0.0077	0.0179
Rental Self-Storage	0.0005	0.0004	0.0009
Research & Development	0.0231	0.0173	0.0404
Hospitality (Lodging)	0.0086	0.0065	0.0151
Commercial Offices (Standard)	0.0364	0.0273	0.0637
Commercial Offices (Large High Rise)	0.0345	0.0259	0.0604
Corporate Offices	0.0204	0.0153	0.0357
Medical Offices	0.0324	0.0243	0.0567

#### **4. Total Student Generation Impact**

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

**TABLE 15**  
**TOTAL STUDENT GENERATION IMPACT PER 1,000 SQUARE FEET OF**  
**COMMERCIAL/INDUSTRIAL DEVELOPMENT**

COMMERCIAL/INDUSTRIAL CATEGORY	ELEMENTARY SCHOOL COST IMPACT	MIDDLE SCHOOL COST IMPACT	TOTAL STUDENT GENERATION COST IMPACT
Banks	0.0624	0.0273	0.0897
Community Shopping Center	0.0339	0.0148	0.0487
Neighborhood Shopping Center	0.0618	0.0271	0.0889
Industrial Business Parks	0.0776	0.0339	0.1115
Industrial/Warehousing/Manufacturing	0.0297	0.0130	0.0427
Rental Self-Storage	0.0014	0.0007	0.0021
Research & Development	0.0672	0.0293	0.0965
Hospitality (Lodging)	0.0250	0.0110	0.0360
Commercial Offices (Standard)	0.1058	0.0462	0.1520
Commercial Offices (Large High Rise)	0.1003	0.0439	0.1442
Corporate Offices	0.0593	0.0259	0.0852
Medical Offices	0.0942	0.0412	0.1354

## **C. NET IMPACT PER COMMERCIAL/INDUSTRIAL SQUARE FOOT**

### **1. Cost Impact**

To estimate the school facilities costs required to house new students as a result of additional commercial/industrial development, the total school facilities cost per student was determined by multiplying the school facilities costs per student determined in Table 7 by the student generation impacts for the elementary and middle school levels shown in Table 15. The school facilities cost impacts are shown in Table 16 by commercial/industrial development category and school level.

**TABLE 16**  
**SCHOOL FACILITIES COSTS PER 1,000 SQUARE FEET OF**  
**COMMERCIAL/INDUSTRIAL DEVELOPMENT**

COMMERCIAL/INDUSTRIAL CATEGORY	ELEMENTARY SCHOOL IMPACT	MIDDLE SCHOOL IMPACT	TOTAL COST IMPACT
Banks	\$2,088	\$521	\$2,609
Community Shopping Center	\$1,134	\$283	\$1,417
Neighborhood Shopping Center	\$2,068	\$518	\$2,586
Industrial Business Parks	\$2,597	\$648	\$3,245
Industrial Parks/Warehousing/Manufacturing	\$994	\$248	\$1,242
Rental Self-Storage	\$47	\$13	\$60
Research & Development	\$2,249	\$560	\$2,809
Hospitality (Lodging)	\$837	\$210	\$1,047
Commercial Offices (Standard)	\$3,540	\$882	\$4,422
Commercial Offices (Large High Rise)	\$3,356	\$839	\$4,195
Corporate Offices	\$1,984	\$495	\$2,479
Medical Offices	\$3,152	\$787	\$3,939

## 2. Residential Fee Offsets

New commercial/industrial development within the School District will generate new employees, thereby increasing the need for new residential development to house those employees living in the School District. Residential school fees adopted by the School District under applicable law will also be imposed by the School District on such new residential development. To prevent new commercial/industrial development from paying the portion of impact that is mitigated by the applicable residential school fees, this amount has been calculated and deducted from the school facilities impact costs calculated in Table 16.

The residential fee offsets are calculated by using the School District's proposed Level I Fee applicable to residential development (\$2.53 per square foot) and multiplying that amount by the weighted average square footage of a residential unit in the School District, which is 1,147 square feet. This calculation provides the average residential revenues from a residential unit of \$2,902 ( $\$2.53 \times 1,147$ ). The average residential revenues from a residential unit multiplied by Household Impacts per 1,000 square feet of commercial/industrial development, as shown in Table 12, results in the residential school fee revenues per 1,000 square feet of commercial/industrial development ("Residential Fee Offset"). This computation is shown in Table 17.

**TABLE 17  
RESIDENTIAL FEE OFFSET**

COMMERCIAL/INDUSTRIAL CATEGORY	SCHOOL DISTRICT HOUSEHOLDS PER 1,000 SQUARE FEET COM./IND.	RESIDENTIAL FEE OFFSET PER 1,000 SQUARE FEET COM./IND.
Banks	0.2677	\$777
Community Shopping Center	0.1454	\$422
Neighborhood Shopping Center	0.2651	\$769
Industrial Business Parks	0.3331	\$967
Industrial Parks/Warehousing/Manufacturing	0.1276	\$370
Rental Self-Storage	0.0061	\$18
Research & Development	0.2881	\$836
Hospitality (Lodging)	0.1073	\$311
Commercial Offices (Standard)	0.4538	\$1,317
Commercial Offices (Large High Rise)	0.4305	\$1,249
Corporate Offices	0.2543	\$738
Medical Offices	0.4041	\$1,173

### 3. Net School Facilities Costs

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

**TABLE 18  
NET SCHOOL FACILITIES COSTS  
PER 1,000 SQUARE FEET COMMERCIAL/INDUSTRIAL DEVELOPMENT**

COMMERCIAL/INDUSTRIAL CATEGORY	TOTAL SCHOOL FACILITIES COSTS	RESIDENTIAL FEE OFFSET	NET SCHOOL FACILITIES COSTS (PER 1,000 SQUARE FEET COM./IND.)
Banks	\$2,609	\$777	\$1,832
Community Shopping Center	\$1,417	\$422	\$995
Neighborhood Shopping Center	\$2,586	\$769	\$1,817
Industrial Business Parks	\$3,245	\$967	\$2,278
Industrial Parks/Warehousing/Manufacturing	\$1,242	\$370	\$872
Rental Self-Storage	\$60	\$18	\$42
Research & Development	\$2,809	\$836	\$1,973
Hospitality (Lodging)	\$1,047	\$311	\$736
Commercial Offices (Standard)	\$4,422	\$1,317	\$3,105
Commercial Offices (Large High Rise)	\$4,195	\$1,249	\$2,946
Corporate Offices	\$2,479	\$738	\$1,741
Medical Offices	\$3,939	\$1,173	\$2,766

The Net School Facilities Costs determined in Table 18 were then divided by 1,000<sup>6</sup> to provide the cost impact on a square foot basis. These cost impacts are listed in Table 19.

**TABLE 19**  
**NET COST IMPACTS**  
**PER SQUARE FOOT OF COMMERCIAL/INDUSTRIAL DEVELOPMENT**

COMMERCIAL/INDUSTRIAL CATEGORY	NET IMPACTS
Banks	<b>\$1.83</b>
Community Shopping Center	<b>\$1.00</b>
Neighborhood Shopping Center	<b>\$1.82</b>
Industrial Business Parks	<b>\$2.28</b>
Industrial Parks/Warehousing/Manufacturing	<b>\$0.87</b>
Rental Self-Storage	<b>\$0.04</b>
Research & Development	<b>\$1.97</b>
Hospitality (Lodging)	<b>\$0.74</b>
Commercial Offices (Standard)	<b>\$3.11</b>
Commercial Offices (Large High Rise)	<b>\$2.95</b>
Corporate Offices	<b>\$1.74</b>
Medical Offices	<b>\$2.77</b>

The net cost impacts shown in Table 19 are greater than the School District's share of the current maximum authorized commercial/industrial School Fees of \$0.41 per square foot, except for the category of Rental Self-Storage. Therefore, the School District is justified in levying school fees on commercial/industrial in amount up to but not exceeding the School District's share of the maximum authorized statutory fee. For Rental Self-Storage businesses, the School District is justified in collecting \$0.04 per square foot.

#### **D. COMMERCIAL/INDUSTRIAL DEVELOPMENT NOT IN PRESCRIBED CATEGORIES**

In cases where new commercial/industrial development does not fit within the prescribed categories shown in Table 19, the School District shall evaluate such development on a case-by-case basis to determine if the imposition of the School Fees on the development meets the nexus requirements set forth under Government Code Section 66000 et seq. The School District may levy School Fees on such development in an amount up to but not exceeding the cost per square foot impact determined through such evaluation.

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<sup>6</sup> The Employee Generation rates derived from the SANDAG study are estimated per 1,000 square feet of development.



#### **E. AGE-RESTRICTED (SENIOR) HOUSING**

Government Code Sections 65995.1 and 65995.2 provides school districts may only charge the fees applicable for commercial/industrial development for qualified age-restricted (senior citizen) housing. Qualified age-restricted housing generates employees resulting in school facility impacts similar to those impacts from other commercial/industrial categories specified herein.

## SECTION V. REDEVELOPMENT

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

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

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

## **SECTION VII. GOVERNMENT CODE SECTION 66000**

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

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

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

### **Purpose of the School Fee**

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

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

### **Identify the Use of the Fee**

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

1. Construction or reconstruction of school facilities required to accommodate students generated by new residential and commercial/industrial development in areas of the School District where existing school facilities are needed;
2. Construction or reconstruction of administrative and operations facilities required in response to new student growth from new development;
3. Acquisition or lease of property for unhoused students generated from new development, including the repayment of debt issued for the acquisition of such property;
4. Purchase or lease of interim and/or temporary school facilities in order to accommodate student capacity demands;
5. Costs associated with the administration, collection, and justification for the Applicable School Fees;
6. Provide local funding that may be required if the School District applies for State funding through SB 50.

The School District's Facilities Master Plan outlined proposed improvement plans to a number of existing school facilities and the proposed construction and reconstruction of school facilities. As previously noted and described herein, the Alternative Fees will be used to fund school facilities necessary to accommodate Projected Unhoused Students generated by Projected Units to the extent described in this Study and permitted by applicable law. Such Alternative Fees will be used to fund, in part, the school facilities identified in the Facilities Master Plan, inclusive of those school facilities described in this Study.

### **Relationship Between the Use of the Fee, the Need for School Facilities and the Type of Development on Which the Fee is Imposed**

As determined in the preceding sections, existing school facilities are in need of upgrade or replacement for their continued long-term use and to provide adequate and safe housing for existing student enrollment and students generated from new residential and commercial/industrial development. The fees imposed on such new development will be used, in part, to finance a portion of the construction and/or reconstruction of school facilities required to accommodate student enrollment growth generated by new residential and commercial/industrial development.

### **Determination of the Relationship Between the Fee Amount and the School Facilities Costs Attributable to Type of Development on Which the Fee is Imposed**

The imposition of the Applicable Residential School Fee of \$2.53 per square foot of residential development is justified, as this fee is below the per square foot cost impact to provide adequate school facilities required as a result of such new residential development.

Similarly, the imposition of the Applicable Commercial/Industrial School Fees of \$0.41 per square foot of commercial/industrial development are justified as the fees are equal to or below the estimated per square foot net cost impact to provide adequate school facilities required as a result of such new commercial/industrial development, except for Rental Self-Storage developments.

### **Accounting Procedures for the Fees**

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

## APPENDIX A

### COMMERCIAL/INDUSTRIAL DEVELOPMENT DESCRIPTIONS

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

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

**APPENDIX B**  
**FACILITIES CAPACITY DETERMINATION**

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**LA MESA - SPRING VALLEY SCHOOL DISTRICT  
FACILITIES CAPACITY DETERMINATION  
APPENDIX B**

**Current Classroom Inventory**

Site Name	Portable Classrooms	Permanent Classrooms	Total Classrooms	Special Use Classrooms	General Education Classrooms
<b>Elementary</b>					
Avondale Elementary	10	18	28	-	28
Bancroft Elementary	12	18	30	6	24
Casa de Oro Elementary	2	18	20	4	16
Fletcher Hills Elementary	7	18	25	3	22
Highlands Elementary	9	18	27	1	26
Kempton Elementary	19	18	37	-	37
La Mesa Dale Elementary	10	18	28	2	26
La Presa Elementary	11	16	27	-	27
Lemon Avenue Elementary	16	12	28	2	26
Loma Elementary	5	20	25	-	25
Maryland Avenue Elementary	10	18	28	4	24
Murdock Elementary	14	15	29	-	29
Murray Manor Elementary	8	19	27	-	27
Northmont Elementary	8	18	26	-	26
Rancho Elementary	10	18	28	3	25
Rolando Elementary	5	18	23	-	23
Sweetwater Springs Elementary	9	19	28	5	23
<b>ELEMENTARY SCHOOL (TK-6) TOTAL</b>	<b>165</b>	<b>299</b>	<b>464</b>	<b>30</b>	<b>434</b>
<b>Middle</b>					
La Mesa Arts Academy	10	39	49	-	49
STEAM Academy @ La Presa	11	40	51	-	51
Parkway Middle School	9	35	44	8	36
Spring Valley Academy	15	35	50	4	46
<b>MIDDLE SCHOOL (7-8) TOTALS</b>	<b>45</b>	<b>149</b>	<b>194</b>	<b>12</b>	<b>182</b>
<b>TOTAL (TK-8)</b>	<b>210</b>	<b>448</b>	<b>658</b>	<b>42</b>	<b>616</b>

**DETERMINATION OF EXISTING BUILDING CAPACITY**

Description	General Education			Non Severe <sup>1</sup>	Severe	Total
	K-6	7-8	9-12			
I. Total Classroom Inventory	434	182	-	42	-	658
II. Permanent Classrooms						448
III. Portable Classrooms						210
IV. 25% of Permanent Classrooms						112
V. Adjustment (III. Minus IV.)						98
IV. Total (I. minus V.)	362	162	-	36	-	560
Building Capacity <sup>2</sup>	9,050	4,374	-	468	-	13,892

1 All Special Use Classrooms have been categorized as Non-Severe.

2 School capacities are determined based on loading factors of 25 pupils per classroom for grades K through 6 , 27 pupils per classroom for grades 7 through 12, 9 pupils per classroom for severe pupils and 13 pupils per classroom for non-severe pupils as set forth in the California Code of Regulation, Title II, Section 1859.35.

**BUILDING CAPACITY BY SCHOOL LEVELS**

Description	K-6	7-8	9-12	Total
	9,050	4,374	-	13,424
Proration of Non Severe Capacity	316	152	-	468
Proration of Severe Capacity	-	-	-	-
Total	9,366	4,526	-	13,892



**LA MESA - SPRING VALLEY SCHOOL DISTRICT  
FACILITIES CAPACITY DETERMINATION  
APPENDIX B**

**Projected 2029 Classroom Inventory**

Site Name	Portable Classrooms	Permanent Classrooms	Total Classrooms	Special Use Classrooms Apportioned based on 2029 CR	General Education Classrooms
<b>Elementary</b>					
Avondale Elementary	-	14	14	-	14
Bancroft Elementary	4	15	19	4	15
Casa de Oro Elementary	4	15	19	4	15
Fletcher Hills Elementary	-	33	33	4	29
Highlands Elementary	-	30	30	1	29
Kempton Elementary	19	4	23	-	23
La Mesa Dale Elementary	7	17	24	2	22
La Presa Elementary	-	15	15	-	15
Lemon Avenue Elementary	21	5	26	2	24
Loma Elementary	-	14	14	-	14
Maryland Avenue Elementary	10	11	21	3	18
Murdock Elementary	-	29	29	-	29
Murray Manor Elementary	-	30	30	-	30
Northmont Elementary	8	16	24	-	24
Rancho Elementary	4	12	16	2	14
Rolando Elementary	-	28	28	-	28
Sweetwater Springs Elementary	-	29	29	5	24
<b>ELEMENTARY SCHOOL (TK-6) TOTAL</b>	<b>77</b>	<b>317</b>	<b>394</b>	<b>27</b>	<b>367</b>
<b>Middle</b>					
La Mesa Arts Academy	-	46	46	-	46
STEAM Academy @ La Presa	-	23	23	-	23
Parkway Middle School	1	37	38	7	31
Spring Valley Academy	8	22	30	2	28
<b>MIDDLE SCHOOL (7-8) TOTALS</b>	<b>9</b>	<b>128</b>	<b>137</b>	<b>9</b>	<b>128</b>
<b>TOTAL (TK-8)</b>	<b>86</b>	<b>445</b>	<b>531</b>	<b>36</b>	<b>495</b>

**DETERMINATION OF PROJECTED 2029 BUILDING CAPACITY**

Description	General Education			Non Severe <sup>1</sup>	Severe	Total
	K-6	7-8	9-12			
I. Total Classroom Inventory	367	128	-	36	-	531
II. Permanent Classrooms						445
III. Portable Classrooms						86
IV. 25% of Permanent Classrooms						111
V. Adjustment (III. Minus IV.)						-
IV. Total (I. minus V.)	367	128	-	36	-	531
Building Capacity <sup>2</sup>	9,175	3,456	-	468	-	13,099

1 All Special Use Classrooms have been categorized as Non-Severe.

2 School capacities are determined based on loading factors of 25 pupils per classroom for grades K through 6 , 27 pupils per classroom for grades 7 through 12, 9 pupils per classroom for severe pupils and 13 pupils per classroom for non-severe pupils as set forth in the California Code of Regulation, Title II, Section 1859.35.

**BUILDING CAPACITY BY SCHOOL LEVELS**

Description	K-6	7-8	9-12	Total
General Education	9,175	3,456	-	12,631
Proration of Non Severe Capacity	340	128	-	468
Proration of Severe Capacity	-	-	-	-
Total	9,515	3,584	-	13,099

**APPENDIX C**  
**ENROLLMENT SUMMARY**

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**LA MESA - SPRING VALLEY SCHOOL DISTRICT  
2020/2021 ENROLLMENT SUMMARY  
APPENDIX C**

<b>Enrollment</b>											
<b>School Name/Program</b>	<b>School Level/Grade</b>										
	<b>Elementary</b>								<b>Middle</b>		<b>Grand Total</b>
	<b>TK</b>	<b>K</b>	<b>1</b>	<b>2</b>	<b>3</b>	<b>4</b>	<b>5</b>	<b>6</b>	<b>7</b>	<b>8</b>	
Avondale Elementary	-	53	51	45	58	46	53	52	-	-	358
Bancroft Elementary	-	55	55	60	59	49	60	61	-	-	399
Casa de Oro Elementary	23	48	59	57	49	40	49	28	-	-	353
Fletcher Hills Elementary	20	75	98	78	94	90	99	73	-	-	627
Highlands Elementary	18	59	80	76	83	71	66	72	-	-	525
Kempton Elementary	24	87	111	102	86	96	61	-	-	-	567
La Mesa Dale Elementary	24	84	79	77	86	66	48	58	-	-	522
La Presa Elementary	-	62	50	58	59	58	54	63	-	-	404
Lemon Avenue Elementary	17	80	86	85	77	70	67	55	-	-	537
Loma Elementary	-	40	38	41	50	35	41	48	-	-	293
Maryland Avenue Elementary	26	71	60	60	78	57	56	53	-	-	461
Murdock Elementary	23	108	101	84	89	79	85	58	-	-	627
Murray Manor Elementary	-	95	105	91	93	80	84	69	-	-	617
Northmont Elementary	16	63	59	60	49	65	63	56	-	-	431
Rancho Elementary	1	37	46	39	49	49	44	44	-	-	309
Rolando Elementary	-	68	81	82	81	58	56	46	-	-	472
Sweetwater Springs Elementary	3	61	72	74	71	66	63	56	-	-	466
La Mesa Arts Academy	-	-	-	-	-	100	134	163	348	346	1,091
STEAM Academy @ La Presa	-	-	-	-	-	32	67	105	331	294	829
Parkway Middle School	-	-	-	-	-	-	-	-	339	370	709
Spring Valley Academy	-	-	-	-	-	-	-	61	217	247	525
Kempton Literacy Academy	-	-	-	-	-	-	-	-	1	5	6
Trust Academy	-	4	7	5	7	11	5	8	11	10	68
<b>GRAND TOTAL</b>	<b>195</b>	<b>1,150</b>	<b>1,238</b>	<b>1,174</b>	<b>1,218</b>	<b>1,218</b>	<b>1,255</b>	<b>1,229</b>	<b>1,247</b>	<b>1,272</b>	<b>11,196</b>
<b>ELIGIBLE BY SCHOOL LEVEL</b>	<b>8,677</b>								<b>2,519</b>		<b>11,196</b>

## APPENDIX D

### STUDENT GENERATION RATES

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Student Generation Rates (SGRs) used in this Study are based on information obtained from the County of Alameda Assessor's Office (the "County"), and student enrollment data from the School District.

A property database reflective of the County GIS data (which contains the property characteristic data as of December 2020) was first obtained. The property database contains property information for parcels within the School District, including land use class information (i.e. condominiums, single family dwellings, etc.). Parcels in the database were classified by unit type (SFD, SFA, MF) based on the County's land use class designations and further research as necessary. K&G Public Finance relied on housing information derived from U.S. Census Bureau data<sup>7</sup> to estimate the total number of residential units located within the School District.

A student enrollment database was obtained from the School District and was reflective of student enrollment information as of October 2020. The student enrollment address information was matched to the address (situs address) information of parcels in the County's property characteristic database. The number of students matched was then queried by school level and residential category. Students could not be matched if they were inter-district or they did not have a valid physical address (e.g. only P.O. Box was listed). Mobile homes are not considered in the SGR determination, including the students matched to the mobile home land use, and therefore have been omitted<sup>8</sup>. The determination of the SGRs is summarized in Tables D-1 through D-3.

**TABLE D-1**  
**SINGLE FAMILY DETACHED (SFD)**  
**STUDENT GENERATION RATES**

SCHOOL LEVEL	STUDENTS MATCHED	SFD UNITS <sup>1</sup>	SGR BY SCHOOL LEVEL
Elementary School (TK-6)	4,360	28,878	0.1510
Middle School (7-8)	1,212	28,878	0.0420
<b>TOTAL</b>	<b>5,572</b>	<b>NA</b>	<b>0.1930</b>

<sup>1</sup> 2015-2019 American Community Survey 5-Year Estimates; DP04 – Selected Housing

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<sup>7</sup> 2015-2019 American Community Survey 5-Year Estimates; DP04 – Selected Housing.

<sup>8</sup> Education Code Section 17625 sets forth the prerequisites that must be met before school districts may levy school fees on mobile homes. Since it is often difficult to determine and make projections relating to mobile homes that meet those requirements, the mobile home category is omitted from this analysis.

**TABLE D-2**  
**SINGLE FAMILY ATTACHED (SFA)**  
**STUDENT GENERATION RATES**

SCHOOL LEVEL	STUDENTS MATCHED	SFD UNITS <sup>1</sup>	SGR BY SCHOOL LEVEL
Elementary School (TK-6)	771	2,895	0.2663
Middle School (7-8)	189	2,895	0.0653
<b>TOTAL</b>	<b>960</b>	<b>NA</b>	<b>0.3316</b>

<sup>1</sup> 2015-2019 American Community Survey 5-Year Estimates; DP04 – Selected Housing

**TABLE D-3**  
**MULTI-FAMILY (MF)**  
**STUDENT GENERATION RATES**

SCHOOL LEVEL	STUDENTS MATCHED	MF UNITS <sup>1</sup>	SGR BY SCHOOL LEVEL
Elementary School (TK-6)	2,174	17,378	0.1251
Middle School (7-8)	614	17,378	0.0353
<b>TOTAL</b>	<b>2,788</b>	<b>NA</b>	<b>0.1604</b>

<sup>1</sup> 2015-2019 American Community Survey 5-Year Estimates; DP04 – Selected Housing

In order to evaluate students generated from future households by school level, the student generation rates determined in Tables D-1 through D-3 above (also summarized in Table 3 of this Study) were used. These student generation rates are listed by residential category and by school level.

**TABLE D-4**  
**STUDENT GENERATION RATES**

SCHOOL LEVEL	SFD UNITS	SFA UNITS	MF UNITS
Elementary School (TK-6)	0.1510	0.2663	0.1251
Middle School (7-8)	0.0420	0.0653	0.0353
<b>TOTAL</b>	<b>0.1930</b>	<b>0.3316</b>	<b>0.1604</b>

The student generation rates for each residential category listed in Table D-4 were blended into a single student generation rate for each school level based on the percentage allocation of Projected Units. The percentage allocations are shown in Table D-5.

**TABLE D-5**  
**ALLOCATION OF PROJECTED UNITS BY RESIDENTIAL CATEGORY**

RESIDENTIAL CATEGORY	PROJECTED UNITS	PERCENTAGE ALLOCATION
SFD	366	38.4%
SFA	120	12.6%
MF	466	49.0%
<b>TOTAL</b>	<b>952</b>	<b>100.0%</b>

The Blended Student Generation Rates were determined by applying the percentage allocations, the results of which are shown in Table D-6.

**TABLE D-6**  
**BLENDED STUDENT GENERATION RATES**

<b>SCHOOL LEVEL</b>	<b>BLENDED STUDENT GENERATION RATE</b>
Elementary School (TK-6)	0.1529
Middle School (7-8)	0.0417
<b>TOTAL</b>	<b>0.1946</b>