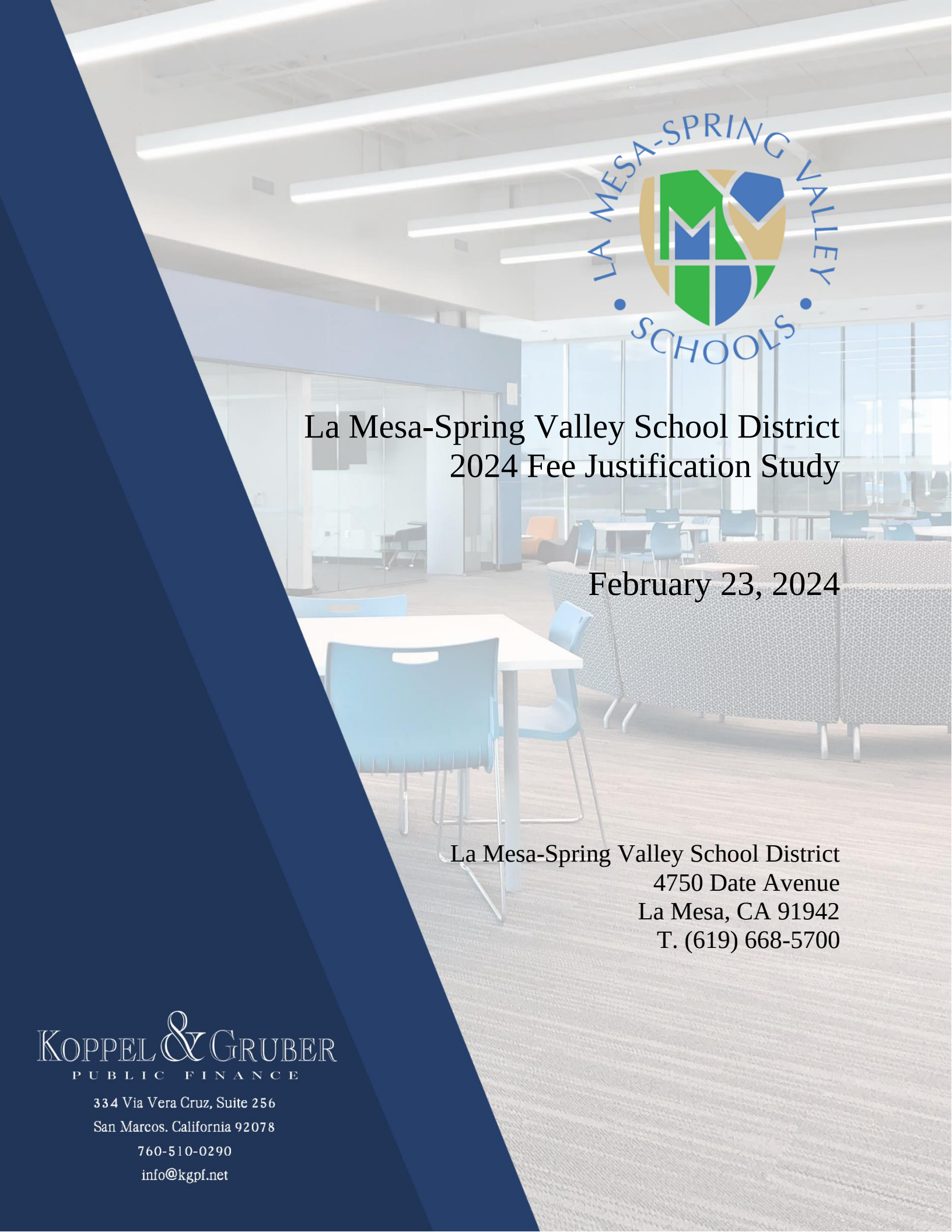

La Mesa-Spring Valley School District
2024 Fee Justification Study

February 23, 2024

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EXECUTIVE SUMMARY

Education Code Section 17620 authorizes the governing board of a school district to levy school fees to offset the impacts to school facilities from new residential and commercial/industrial construction and reconstruction. In order to levy Level I fees (statutory fees), a school district must prepare and adopt a 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 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 State Allocation Board ("SAB") reviews and may adjust the maximum authorized School Fees every other year in even-numbered years, most recently being on January 24, 2024. The maximum School Fees authorized by Education Code Section 17620 are currently $5.17 per square foot for residential construction/reconstruction and $0.84 per square foot for commercial/industrial construction for unified school districts.

The School District 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 $3.21 and $0.52 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 209 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 $3.21 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

Impact per Square Foot	Applicable Residential School Fee per Square Foot
$5.29	**$3.21**

Commercial/Industrial Development

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

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

The cost impacts per square foot for each category of commercial/industrial construction are equal to or exceed $0.52 per square foot, the School District's maximum authorized School Fee per square foot applicable to new commercial/industrial development; except for Rental Self-Storage where a School Fee of $0.05 per square foot is justified ("Applicable Com/Ind School Fees"). Therefore, except for Rental Self-Storage development, the School District is fully justified in levying commercial/industrial School Fees on new commercial/industrial development in an amount up to but not exceeding the Applicable Com/Ind School Fees. The Applicable Com/Ind School Fees that may be charged by the School District are summarized in Table E-2.

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

Commercial/Industrial Category	Impact per Square Foot	Maximum Applicable School Fees
Banks	$2.35	**$0.52**
Community Shopping Center	$1.28	**$0.52**
Neighborhood Shopping Center	$2.32	**$0.52**
Industrial Business Parks	$2.92	**$0.52**
Industrial Parks/Warehousing/Manufacturing	$1.12	**$0.52**
Rental Self-Storage	$0.05	**$0.05**
Research & Development	$2.52	**$0.52**
Hospitality (Lodging)	$0.94	**$0.52**
Commercial Offices (Standard)	$3.97	**$0.52**
Commercial Offices (Large High Rise)	$3.77	**$0.52**
Corporate Offices	$2.23	**$0.52**
Medical Offices	$3.54	**$0.52**

SECTION I. LEGISLATION AND LEGAL REQUIREMENTS

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

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

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

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

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

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

November 3, 1998 ballot (Proposition 1A). With the passage of Proposition 1A in November 1998, SB 50 became operative.

SB 50 also limited the power of cities and counties to require mitigation of school facilities impacts 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.

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

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). Per Education Code Section 17071.10, these facilities have a capacity to accommodate 13,892 students. Pursuant to Education Code Section 17071.30, portable classrooms were not included in the calculation to the extent they are (i) leased through the State Relocatable Classroom Program, (ii) leased for a period of less than five (5) years, (iii) leased when needed as interim housing (project basis), or (iv) represent the number of portables that exceed 25% of the School District's permanent classrooms. Appendix "B" provides a calculation of the updated facility capacity. It should be noted these capacities are driven by State loading standards and do not necessarily reflect the School District's program goals or the condition of such facilities.

Based on Student Enrollment Data as of October 2023, the student enrollment of the School District is 10,657 students. A summary of the student enrollment data is included in Appendix "C". Current available capacity is calculated by subtracting current student enrollment from existing school facilities capacity for each school level. This operation results in a surplus of available seats at all school levels. The available capacity calculation is shown in Table 1.

TABLE 1
Facilities Capacity and Student Enrollment

School Level	Facilities Capacity	Student Enrollment (October 2023)	Available/ (Deficit) Capacity
Elementary School (TK-6)	9,366	8,357	1,009
Middle School (7-8)	4,526	2,300	2,226
Total	**13,892**	**10,657**	**3,235**

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 1,167 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") - dwelling units with no common walls and assigned an individual and separate assessor's parcel;

(ii) Single family attached ("SFA") - dwelling units sharing a common wall with each unit being on a separate and unique assessor's parcel (e.g. townhouses, condominiums, etc.);

(iii) Multi-family units ("MF") - dwelling units which share a single assessor's parcel and share a common wall (e.g. apartments, duplexes, etc.).

The estimated total Projected Units in the entire School District are summarized by residential category in Table 2. It should be noted that Mobile homes are not included in this analysis. [1]

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

TABLE 2
Projected Units by Residential Category

Residential Category	Total Projected Units
Single-Family Detached (SFD)	30
Single-Family Attached (SFA)	209
Multi-Family (MF)	928
Total	**1,167**

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 and property characteristic/GIS data and residential building permits data from the City as of February 2023. Parcels in the data file were classified by unit type (SFD, SFA and MF) and residential parcels were extracted.

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

TABLE 3
Student Generation Rates

School Level	SFD Units	SFA Units	MF Units
Elementary School (TK-6)	0.1533	0.1410	0.1404
Middle School (7-8)	0.0423	0.0366	0.0370
Total	**0.1956**	**0.1776**	**0.1774**

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 207 students are estimated to be generated from Projected Units. The projected student enrollment is summarized by school level in Table 4.

TABLE 4
Projected Student Enrollment by School Level

School Level	Total Projected Student Enrollment
Elementary School (TK-6)	164
Middle School (7-8)	43
Total	**207**

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 could experience modest declining enrollment at the elementary level and relatively stable and unchanged enrollment at the middle school level through 2029. 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)	164	0	164
Middle School (7-8)	43	0	43
Total	**207**	**0**	**207**

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 the general plan.

California Assembly Bill 130, a TK-12 trailer bill which was signed by the Governor in September 2021, expands TK age eligibility in two-birth month increments over a period of 4 years commencing with the 2022-23 school year (the "Universal Transitional Kindergarten Program"). The Universal Transitional Program also requires TK programs to operate with a student-teacher ratio of 12:1 in 2022-23 and transitioning to a 10:1 ratio by 2023-24, contingent upon budget appropriations. While the effects of the Universal Transitional Program on the School District's school facilities are difficult to realistically project for the purposes of this Study, it's anticipated the program will increase enrollment growth from both existing housing as well as Projected Units, and such enrollment growth will increase the demand on school facilities. The district anticipates the cost to provide for universal TK is approximately $4,000,000.

In addition to the need for the upgrade, replacement and/or expansion of school facilities for their long term use to accommodate Projected Unhoused Students, capital improvement projects are necessary for the long-term use and adequate housing of student enrollment at the School District's existing facilities to maintain and achieve an adopted level of service. The School District has need for additional science classrooms and a music classroom to achieve its curriculum goals, and the need to replace aged portable classrooms. The facilities needs exist regardless of the availability of capacity to house student enrollment, inclusive of student enrollment generated from new development; therefore without implementation of the capital improvement projects capacity available for Projected Student Enrollment is deemed inadequate.

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[1]	School Site & Construction Costs[2]	Ancillary Costs[2,3]	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
Total	**$346,079,863**	**$40,761,600**	**$386,841,463**

[1] Facilities Master Plan

[2] Includes demolition, new construction, infrastructure and interim housing costs.

[3] 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. On August 24, 2023, the School District issued a second series of bonds "General Obligation Bonds 2020 Election, 2023 Series B" in the amount of $50,000,000.

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[1]	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

[1] Based on the estimated 2029 classroom counts identified in the Facilities Master Plan and application of the provisions set forth under Education Code Section 17071.25, 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

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.

TABLE 8
Total Facilities Cost Impact

School Level	Facilities Cost Impact per Seat/Student	Projected Unhoused Students	Facilities Cost Impact Attributable to Projected Units
Elementary School (TK-6)	$33,461	164	$5,487,604
Middle School (7-8)	$19,101	43	$821,343
Total			**$6,308,947**

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
$6,308,947	1,167	$5,406

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. The weighted average square footage of the Projected Units is estimated based on square footage information from recent development projects constructed within the School District and in the City of San Diego, City of La Mesa, and City of El Cajon.

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
$5,406	1,021	$5.29

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 $3.21 per square foot; therefore, the School District is justified in levying up to but not exceeding the maximum authorized amount for residential construction and reconstruction.

SECTION IV. COMMERCIAL/INDUSTRIAL SCHOOL IMPACT ANALYSIS

The following section presents the school facilities impact analysis for new commercial/industrial development and provides a step-by-step calculation of the estimated per commercial/industrial square foot cost 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 were first used to determine the impact of commercial/industrial development on a per household basis. Based on information derived from U.S. Census Bureau data[2], there are approximately 1.28 employed persons per household on average for households located within the School District. Dividing the employee generation estimates listed in Table 11 by 1.28 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[3], it is estimated that approximately 23.8 percent of employees both live and work within the School District. Multiplying the Total Household Impact by 23.8 percent 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	0.5253
Community Shopping Center	0.2854
Neighborhood Shopping Center	0.5204
Industrial Business Parks	0.6537
Industrial Parks/Warehousing/Manufacturing	0.2505
Rental Self-Storage	0.0120
Research & Development	0.5654
Hospitality (Lodging)	0.2106
Commercial Offices (Standard)	0.8906
Commercial Offices (Large High Rise)	0.8449
Corporate Offices	0.4992
Medical Offices	0.7931

[2] 2022 American Community Survey 5-Year Estimates; DP04-Selected Housing; DP03-Economic Characteristics (Civilian Employed).
[3] 2022 American Community Survey 5-Year Estimates; S0801-Commuting Characteristics (Work in place of residence).

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 determination of student generation rates are shown and described in Appendix "C" 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	0.0740	0.0195	0.0935
Community Shopping Center	0.0402	0.0106	0.0508
Neighborhood Shopping Center	0.0733	0.0193	0.0926
Industrial Business Parks	0.0920	0.0243	0.1163
Industrial Parks/Warehousing/ Manufacturing	0.0353	0.0093	0.0446
Rental Self-Storage	0.0017	0.0004	0.0021
Research & Development	0.0796	0.0210	0.1006
Hospitality (Lodging)	0.0297	0.0078	0.0375
Commercial Offices (Standard)	0.1254	0.0330	0.1584
Commercial Offices (Large High Rise)	0.1190	0.0313	0.1503
Corporate Offices	0.0703	0.0185	0.0888
Medical Offices	0.1117	0.0294	0.1411

3. Inter-District Student Impact

Based on information provided by the School District, 929 students were enrolled at the School District on an inter-district basis, including 754 students at the elementary school level and 175 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 66,276[4] based on data obtained from the U.S. Census Bureau. The ratio of inter-district students to estimated employment for each school level was then multiplied by the employee generation factors for each of the commercial/industrial categories as shown in Table 11. The calculation results in the Inter-District Student Impacts shown in Table 14.

[4] US Census Bureau- 2019 ACS 5 Year Economic Characteristics (DP03)

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	0.0322	0.0073	0.0395
Community Shopping Center	0.0175	0.0040	0.0215
Neighborhood Shopping Center	0.0319	0.0073	0.0392
Industrial Business Parks	0.0401	0.0091	0.0492
Industrial/Warehousing/ Manufacturing	0.0154	0.0035	0.0189
Rental Self-Storage	0.0007	0.0002	0.0009
Research & Development	0.0347	0.0079	0.0426
Hospitality (Lodging)	0.0129	0.0029	0.0158
Commercial Offices (Standard)	0.0546	0.0125	0.0671
Commercial Offices (Large High Rise)	0.0518	0.0118	0.0636
Corporate Offices	0.0306	0.0070	0.0376
Medical Offices	0.0486	0.0111	0.0597

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	0.1062	0.0268	0.1330
Community Shopping Center	0.0577	0.0146	0.0723
Neighborhood Shopping Center	0.1052	0.0266	0.1318
Industrial Business Parks	0.1321	0.0334	0.1655
Industrial/Warehousing/ Manufacturing	0.0507	0.0128	0.0635
Rental Self-Storage	0.0024	0.0006	0.0030
Research & Development	0.1143	0.0289	0.1432
Hospitality (Lodging)	0.0426	0.0107	0.0533
Commercial Offices (Standard)	0.1800	0.0455	0.2255
Commercial Offices (Large High Rise)	0.1708	0.0431	0.2139
Corporate Offices	0.1009	0.0255	0.1264
Medical Offices	0.1603	0.0405	0.2008

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 Facilities Cost Impact per Seat/Student determined in Table 7 is multiplied by the household impacts calculated in Table 15, resulting in the total school facilities cost impact per 1,000 square feet of commercial/industrial development. The total school facilities cost impacts are shown in Table 16 by commercial/industrial development category.

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

Commercial/Industrial Category	Elementary School Cost Impact	Middle School Cost Impact	Total Cost Impact
Banks	$3,554	$512	$4,066
Community Shopping Center	$1,931	$279	$2,210
Neighborhood Shopping Center	$3,520	$508	$4,028
Industrial Business Parks	$4,420	$638	$5,058
Industrial	$1,696	$244	$1,940
Rental Self-Storage	$80	$11	$91
Research & Development	$3,825	$552	$4,377
Hospitality (Lodging)	$1,425	$204	$1,629
Commercial Offices (Standard)	$6,023	$869	$6,892
Commercial Offices (Large High Rise)	$5,715	$823	$6,538
Corporate Offices	$3,376	$487	$3,863
Medical Offices	$5,364	$774	$6,138

2. Residential Fee Offsets

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

The residential fee offsets are first calculated by using the Applicable Residential School Fee of $3.21 per square foot and multiplying that amount by the weighted average square

footage of a residential unit in the School District, which is 1,021 square feet. This calculation provides the average residential revenues from a residential unit of $3,277.41 ($3.21 x 1,021). The average residential revenues from a residential unit multiplied by the Household Impacts per 1,000 square feet of commercial/industrial development, as shown in Table 12, results in the residential school fee revenues per 1,000 square feet of commercial/industrial development ("Residential Fee Offset"). This computation is shown in Table 17.

TABLE 17
Residential Fee Offset

Commercial/Industrial Category	School District Households per 1,000 Square Feet Com./Ind.	Residential Fee Offset	Residential Fee Offset per 1,000 Square Feet Com./Ind.
Banks	0.5253	$3,277	$1,721
Community Shopping Center	0.2854	$3,277	$935
Neighborhood Shopping Center	0.5204	$3,277	$1,705
Industrial Business Parks	0.6537	$3,277	$2,142
Industrial Parks/Warehousing/ Manufacturing	0.2505	$3,277	$821
Rental Self-Storage	0.0120	$3,277	$39
Research & Development	0.5654	$3,277	$1,853
Hospitality (Lodging)	0.2106	$3,277	$690
Commercial Offices (Standard)	0.8906	$3,277	$2,918
Commercial Offices (Large High Rise)	0.8449	$3,277	$2,769
Corporate Offices	0.4992	$3,277	$1,636
Medical Offices	0.7931	$3,277	$2,599

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	$4,066	$1,721	$2,345
Community Shopping Center	$2,210	$935	$1,275
Neighborhood Shopping Center	$4,028	$1,705	$2,323
Industrial Business Parks	$5,058	$2,142	$2,916
Industrial	$1,940	$821	$1,119
Rental Self-Storage	$91	$39	$52
Research & Development	$4,377	$1,853	$2,524
Hospitality (Lodging)	$1,629	$690	$939
Commercial Offices (Standard)	$6,892	$2,918	$3,974
Commercial Offices (Large High Rise)	$6,538	$2,769	$3,769
Corporate Offices	$3,863	$1,636	$2,227
Medical Offices	$6,138	$2,599	$3,539

The Net School Facilities Costs determined in Table 18 were then divided by 1,000[5] 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 School Facilities Cost Impact
Banks	$2.35
Community Shopping Center	$1.28
Neighborhood Shopping Center	$2.32
Industrial Business Parks	$2.92
Industrial Parks/Warehousing/Manufacturing	$1.12
Rental Self-Storage	$0.05
Research & Development	$2.52
Hospitality (Lodging)	$0.94
Commercial Offices (Standard)	$3.97
Commercial Offices (Large High Rise)	$3.77
Corporate Offices	$2.23
Medical Offices	$3.54

The net school facilities cost impacts shown in Table 19 are greater than the School District's

[5] The Employee Generation rates derived from the SANDAG study are estimated per 1,000 square feet of development.

share of the current maximum authorized commercial/industrial School Fees of $0.52 per square foot, except for the category of Rental Self-Storage. Therefore, the School District is justified in levying school fees on commercial/industrial development 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 $0.05 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.

E. Age-Restricted (Senior) Housing

The School District must exercise discretion in determining whether a particular project qualifies as "senior citizen housing" for the purpose of imposing developer fees. (See California Ranch Homes Development Co. v. San Jacinto Unified School Dist. (1993) 17 Cal.App.4th 573, 580–581.) The School District acknowledges Section 65995.1 and will levy its share of School Fees on qualifying senior citizen housing projects at the current commercial/industrial rate of $0.52 per square foot as justified herein. The School District will require proof that such senior units are indeed restricted to seniors (i.e. a copy of the recorded Covenants, Conditions, and Restrictions ("CC&Rs") or deed(s)) and reserves the right to revoke a Certificate of Compliance and/or require payment of difference of the amount per square foot paid to the then current amount of School Fees being levied on residential development per square foot should such CC&Rs or deed(s) be modified to allow students to reside in such the housing units. If there is any uncertainty as to whether a project qualifies as senior citizen housing or will, in fact, remain senior citizen housing beyond initial approval, the School District may wish to seek cooperation from the developer as a condition of levying the commercial/industrial School Fee rate. Such cooperation could take the form of an agreement by the developer to include a restriction in the recorded CC&Rs conditioning subsequent changes in residency requirements on the owner's payment of applicable developer fees, and to notify the School District of changes in residency requirements and/or to provide current residency data upon School District's request.

SECTION V. REDEVELOPMENT

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

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

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

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

SECTION VI. GOVERNMENT CODE SECTION 66000

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

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

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

Purpose of the School Fee

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

i. Regular maintenance or routine repair of school buildings and facilities;

ii. Inspection, sampling, analysis, encapsulation or removal of asbestos-containing material, except where incidental to school facilities construction or reconstruction for which the expenditure of fees or other consideration collected pursuant to Education Code Section 17620 is not prohibited; and,

iii. Deferred maintenance as described in Education Code Section 17582.

Identify the Use of the School Fee

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

i. Construction or reconstruction of school facilities required to accommodate students generated by new residential and commercial/industrial development in areas of the School District where school facilities are needed;

ii. Construction or reconstruction of administrative and operations facilities required in response to new student growth from new development;

iii. Acquisition or lease of property for unhoused students generated from new development;

iv. Purchase or lease of interim and/or temporary school facilities in order to accommodate student capacity demands;

v. Costs associated with the administration, collection, and justification for the Applicable School Fees;

vi. Provide local funding that may be required if the School District applies for State funding through SB 50.

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

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

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

The imposition of the Applicable Residential School Fee of $3.21 per square foot of residential development is justified as the fee is equal to or below the per square foot cost impacts to provide adequate school facilities required as a result of such new residential development.

Similarly, the imposition of the Applicable Com/Ind. School Fees of $0.52 per square foot of commercial/industrial development is justified as the fee is equal to or below the estimated per square foot net cost impact to provide adequate school facilities required as a result of such new commercial/industrial development, except for Rental Self-Storage where a School Fee of $0.05 per square foot is justified.

Accounting Procedures for the Fees

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

APPENDIX A
COMMERCIAL/INDUSTRIAL DEVELOPMENT DESCRIPTIONS

Banks	Include small branch offices to regional offices used for banking. Properties under this category allow customers to conduct banking on-site.
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)[1]	Include general office space occupying less than 100,000 square feet with multiple tenants.
Commercial Offices (Large High Rise)[1]	Include general office space occupying 100,000 square feet and greater with multiple tenants.
Corporate Offices	An office or office building with a single tenant.
Medical Offices	Include medical offices that serve a wide range of medical needs and may include a pharmacy. Medical offices are generally operated by one or more physicians.

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

APPENDIX B
FACILITIES CAPACITY DETERMINATION

Current Classroom Inventory

Site Name	Portable Classrooms	Permanent Classrooms	Total Classrooms	Special Use Classrooms	General Education Classrooms
Elementary					
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
ELEMENTARY SCHOOL (TK-6) TOTALS	**165**	**299**	**464**	**30**	**434**
Middle					
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
MIDDLE SCHOOL (7-8) TOTALS	**45**	**149**	**194**	**12**	**182**
TOTAL (TK-8)	**210**	**448**	**658**	**42**	**616**

Determination of Building Capacity

Description	General Education			Non Severe[1]	Severe	Total
	TK-6	7-8	9-12			
I. Total Classroom Inventory	434	182	-	42	-	**658**
II. Permanent Classrooms	280	140	-	29	-	**448**
III. Portable Classrooms	154	42	-	13	-	**210**
IV. 25% of Permanent Classrooms	70	35	-	7	-	**112**
V. Adjustment (III. Minus IV.)	72	20	-	6	-	**98**
IV. Total (I. minus V.)	362	162	-	36	-	**560**
Building Capacity[2]	**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 Level

Description	TK-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**

APPENDIX C
ENROLLMENT SUMMARY

Enrollment										
	Elementary							Middle		Grand Total
	TK/K	1	2	3	4	5	6	7	8	
Avondale Elementary	50	51	52	55	43	34	41			326
Bancroft Elementary	77	59	66	56	59	62	63			442
Casa de Oro Elementary	60	49	46	46	62	42	41			346
Fletcher Hills Elementary	115	74	91	79	92	84	77			612
Highlands Elementary	77	64	60	66	63	60	56			446
Kempton Elementary	106	84	77	75	88	71	53			554
La Mesa Dale Elementary	91	81	77	80	66	69	56			520
La Presa Elementary	74	48	57	61	51	59	46			396
Lemon Avenue Elementary	90	84	77	81	75	56	50			513
Loma Elementary	70	42	41	42	45	42	43			325
Maryland Avenue Elementary	133	61	72	72	48	53	45			484
Murdock Elementary	144	99	103	105	67	61	37			616
Murray Manor Elementary	94	86	85	88	80	72	62			567
Northmont Elementary	81	58	71	61	60	57	39			427
Rancho Elementary	79	61	40	45	53	28	50			356
Rolando Elementary	93	50	62	67	68	59	50			449
Sweetwater Springs Elementary	82	61	63	55	67	59	60			447
La Mesa Arts Academy					89	119	157	346	344	1,055
STEAM Academy @ La Presa						26	56	299	313	694
Parkway Middle School							53	311	326	690
Spring Valley Academy								175	165	340
Trust Academy	2	5	5	6	8	2	3	9	12	52
GRAND TOTAL	**1,518**	**1,117**	**1,145**	**1,140**	**1,184**	**1,115**	**1,138**	**1,140**	**1,160**	**10,657**
ELIGIBLE BY SCHOOL LEVEL							**8,357**		**2,300**	**10,657**

APPENDIX D
BLENDED STUDENT GENERATION RATES

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

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

TABLE D-1
Student Generation Rates

School Level	SFD Units	SFA Units	MF Units
Elementary School (TK-6)	0.1533	0.1410	0.1404
Middle School (7-8)	0.0423	0.0366	0.0370
Total	**0.1956**	**0.1776**	**0.1774**

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

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

School Level	No. of Students Matched	Total Units[1]	Student Generation Rate
Elementary School (TK-6)	4,377	28,556	0.1533
Middle School (7-8)	1,208	28,556	0.0423
Total	**5,585**	**NA**	**0.1956**

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

School Level	No. of Students Matched	Total Units[1]	Student Generation Rate
Elementary School (TK-6)	432	3,064	0.1410
Middle School (7-8)	112	3,064	0.0366
Total	**544**	**NA**	**0.1776**

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

School Level	No. of Students Matched	Total Units	Student Generation Rate
Elementary School (TK-6)	2,434	17,337	0.1404
Middle School (7-8)	642	17,337	0.0370
Total	**3,076**	**NA**	**0.1774**

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

TABLE D-4
Allocation of Projected Units by Residential Category

Residential Category	Projected Units	Percentage Allocation
SFD	30	2.6%
SFA	209	17.9%
MF	928	79.5%
Total	**1,167**	**100.0%**

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

TABLE D-5
Blended Student Generation Rates

School Level	Blended Student Generation Rate
Elementary School (TK-6)	0.1408
Middle School (7-8)	0.0371
Total	**0.1779**