

# **School Facilities Needs Analysis**

San Ysidro School District

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### **Exhibits**

<b>Exhibit A:</b>	Current SAB Form 50-01
<b>Exhibit B:</b>	Current SAB Form 50-02
<b>Exhibit C:</b>	Current SAB Form 50-03
<b>Exhibit D:</b>	Eligibility Determination from the SAB
<b>Exhibit E:</b>	Summary of School Facility Planning Policies and Estimates of Actual School Facility Costs
<b>Exhibit F:</b>	Bonding Capacity Calculation
<b>Exhibit G:</b>	Correspondence with the City and County
<b>Exhibit H:</b>	Reconstruction
<b>Exhibit I:</b>	Updated School Facilities Capacity Calculation
<b>Exhibit J:</b>	Allocation of Surplus Seats
<b>Exhibit K:</b>	Identification and Consideration of Local Funding Sources per Section 65995.5(c)(2) and Section 65995.6(b)(3)
<b>Exhibit L:</b>	Calculation of Additional Grants for General Site Development

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## Executive Summary

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

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

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

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

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

### B. Compliance with Statutory Requirements

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

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

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

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

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

**Table ES-2  
Alternative Fees (2014\$)**

<b>Fee</b>	<b>Amount per Square Foot</b>
Alternative No. 2 Fee	\$2.58
Alternative No. 3 Fee	\$5.15

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

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

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

Should the Governing Board of the School District approve the resolution that adopts the Analysis and the accompanying Alternative No. 2 Fee and Alternative No. 3 Fee, those amounts would be effective immediately for a period not to exceed 12 months. By approving the Analysis and the accompanying Alternative Fees, the Governing Board is authorizing the imposition of the Alternative No. 2 Fee for those periods when the State has new construction bond funds available and the Alternative No. 3 Fee for those periods when the SAB is no longer approving apportionments for new construction due to a lack of funds available and the conditions in Section 65995.7 have been met. Senate Bill ("SB") 1016, which was signed into law by Governor Brown on June 27, 2012, amended Section 65995.7(a)(2) to suspend the ability for school districts to impose the Alternative No. 3 Fee through 2014 even if the SAB is no longer approving apportionments for new construction due to a lack of funds available.

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## **I. General**

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

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

- » Section I is the introductory section that generally describes the methodology used in preparing the Analysis.
- » Section II describes the Eligibility Determination that has been obtained from the SAB, as well as documents which of the four (4) Statutory Requirements the School District presently satisfies.
- » Section III projects the unhoused students to be generated by residential development anticipated to occur in the School District over the next five (5) years ("Future Units") in accordance with Section 65995.6(a).
- » Section IV identifies any surplus school sites or existing surplus local funds that the School District might elect in whole or part to use to reduce the impact of the Future Units on the School District.
- » Section V of the Analysis sets forth the recommended amount of the Alternative No. 2 Fee.
- » Section VI of the Analysis sets forth the recommended amount of the Alternative No. 3 Fee.
- » Finally, Section VII documents facts whereby the School District may make determinations regarding compliance of the Alternative Fees with Sections 66000 *et seq.*

### **Eligibility to Collect Alternative Fees**

#### Eligibility to Receive State Funds

A school district must have been determined by the SAB to be eligible for new construction funding under the SFP pursuant to Section 65995.5(b)(1).

#### Statutory Requirements

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

1. A school district has a substantial enrollment, as defined in Section 65995.5(b)(3)(A) ("Substantial Enrollment") of its students on a multi-track year-round calendar;
2. A school district has placed at least one (1) GO bond measure on the ballot in the last four (4) years, and the measure received at least 50 percent plus one (1) of the votes cast;

3. A school district has issued debt or incurred obligations for capital outlay in an amount equivalent to a certain percentage of its bonding capacity; and/or
4. At least 20 percent of the teaching stations within a school district are relocatable classrooms.

## **Projected Unhoused Students from Future Residential Development**

### Total Projected Student Enrollment

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

### Excess Capacity

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

### Projected Unhoused Students

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

## **Surplus Property and Existing Surplus Local Funds**

### Surplus Property

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

### Existing Surplus Local Funds

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

## **Alternative No. 2 Fee**

### Student Capacity and Site Size of Future School Facilities

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

### Site Acquisition and Site Development Costs

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

### Total School Facility Costs per Student and Total School Facility Costs

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

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

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

### Alternative No. 2 Fee

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

## **Alternative No. 3 Fee**

### Alternative No. 3 Fee

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

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## **II. Eligibility to Collect Alternative Fees**

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

### **A. Eligibility to Receive State Funds**

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

### **B. Statutory Requirements**

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

#### **1. Substantial Enrollment on Multi-track Year-Round Schedule**

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

- a. *Unified School Districts and Elementary School Districts.* At least 30 percent of the school district's students in grades kindergarten through 6 are on a multi-track year-round schedule in the high school attendance area in which all or some of the new residential units identified in the Analysis are planned for construction.
- b. *High School Districts.* (i) At least 30 percent of the high school district's students are on a multi-track year-round schedule, or (ii) at least 40 percent of the students in grades kindergarten through 12 within the boundaries of the high school attendance area in which all or some of the new residential units identified in the Analysis are planned for construction are on a multi-track year-round schedule.

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

**2. General Obligation Bond Measure**

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

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

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

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

**The School District has determined that this Statutory Requirement has been satisfied. The School District currently has \$163,367,326 in outstanding debt. This outstanding debt consists of \$39,984,715 in Certificates of Participation ("COPs") and \$123,382,611 in GO bonds issued by the School District. This debt represents 123.23 percent of the School District's bonding capacity (see Exhibit F for a calculation of the School District's bonding capacity).**

**4. Relocatable Classrooms**

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

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

**C. Eligibility to Collect Alternative Fees**

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

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

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

#### **A. Projected Student Enrollment**

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

##### **1. Student Generation Rates**

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

- » Residential units classified as single family detached ("SFD") are defined as units with no common walls each assigned a unique Assessor's parcel number.
- » The category of single family attached ("SFA") consists of units with common walls each assigned a unique Assessor's parcel number (e.g., townhomes, condominiums, etc.).
- » The third type of residential unit, multifamily ("MF"), is defined as a unit with common walls on an Assessor's parcel on which other units are located.

A total of 696 MF units in the School District were identified as meeting the criteria stated above. Dolinka Group then obtained a database of all students within the School District at the beginning of school year 2013/2014. Upon comparison of the two (2) databases, 270 students were matched to the 696 MF units, resulting in the following SGRs for MF units shown in Table 1.

**Table 1**  
**Student Generation Rates for Multifamily Units**

<b>School Level</b>	<b>Number of Students Matched</b>	<b>Number of MF Units</b>	<b>Student Generation Rates</b>
Elementary School (Grades K-6)	221	696	0.3175
Middle School (Grades 7-8)	49	696	0.0704
<b>Total</b>	<b>270</b>	<b>N/A</b>	<b>0.3879</b>

As for SFD and SFA units, Dolinka Group determined that there were an insufficient number of units built over the past five (5) years to calculate SGRs that would be representative of the residential development expected to occur within the School District over the next five (5) years. Since the construction of SFD and SFA units is expected to occur within the School District over the next five (5) years, the Analysis has employed the portion of Section 65995.6(a) that permits a school district to use SGRs of new residential units constructed over the previous five (5) years that are a similar type of unit to those anticipated to be constructed in either the city or county in which the school district is located. The Analysis uses the SGRs for SFD and SFA units that have been experienced and documented by Poway Unified School District ("PUSD"), which is also located in the County. Table 2 shows the SGRs for SFD and SFA units by school level.

**Table 2**  
**Student Generation Rates for SFD and SFA Units**

<b>School Level</b>	<b>SFD Student Generation Rates<sup>[1]</sup></b>	<b>SFA Student Generation Rates<sup>[1]</sup></b>
Elementary School (Grades K-6)	0.4240	0.2482
Middle School (Grades 7-8)	0.0817	0.0491
<b>Total</b>	<b>0.5057</b>	<b>0.2973</b>

[1] Source: Analysis for PUSD dated October 10, 2013.

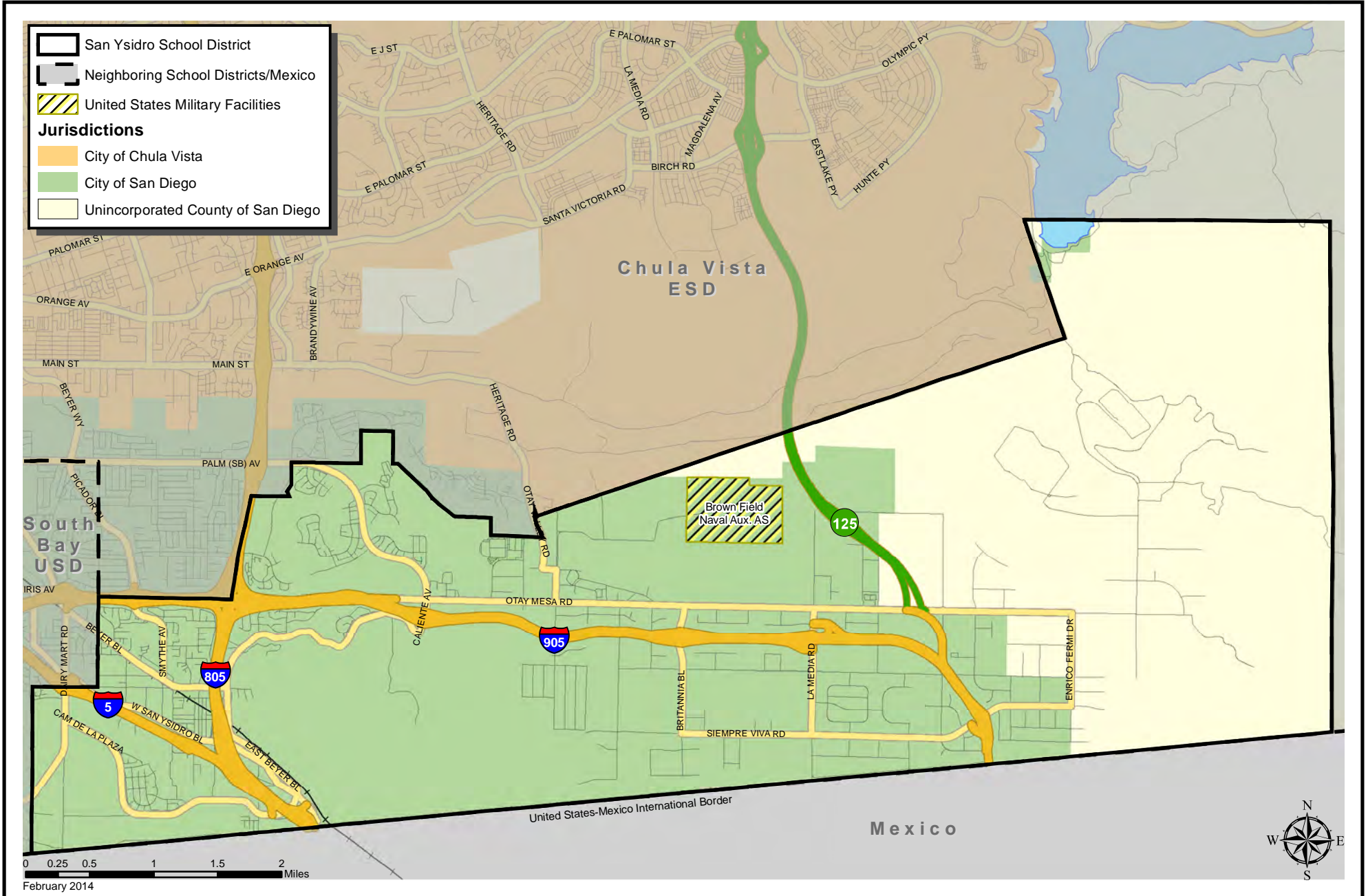
It should be noted that the SGRs calculated for PUSD are based on PUSD's current grade level configuration of elementary schools serving grades K-5 and middle schools serving grades 6-8, and that the SGR shown in Table 2 have been adjusted to reflect the current grade level configuration of the School District of elementary schools serving grades K-6 and middle schools serving grades 7-8.

## **2. Future Units**

In order to obtain information regarding future residential units, the Planning Departments of the City of San Diego ("City") and the County were contacted, (please refer to the map on the following page for a geographic profile of the School District). Based on correspondence from the City and County (see Exhibit G), Dolinka Group has determined that the School District could experience the construction of 1,275 Future Units over the next five (5) years. Of these 1,275 Future Units, 394 units have already mitigated their impact on the School District through participation in one of the three (3) CFDs located throughout the School District. Table 3 distinguishes between Future Units by unit type.

# San Ysidro School District

## Geographic Profile - School Year 2013/2014



**Table 3  
Future Units by Unit Type**

<b>Unit Type</b>	<b>Mitigated Future Units</b>	<b>Non-Mitigated Future Units</b>	<b>Total Future Units</b>
Single Family Detached	0	275	275
Single Family Attached	0	350	350
Multifamily	394	256	650
<b>Total Units</b>	<b>394</b>	<b>881</b>	<b>1,275</b>

The projected number of non-mitigated future residential units identified in Table 3 includes units that may result from existing structures that are voluntarily demolished in order to be replaced by new residential development ("Reconstruction"). For additional information regarding the imposition of the Alternative No. 2 Fee and Alternative No. 3 Fee on Reconstruction please refer to Exhibit H.

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

### **3. Projected Student Enrollment**

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

**Table 4  
Projected Student Enrollment**

<b>School Level</b>	<b>Students Generated from Mitigated Future Units</b>	<b>Students Generated from Non-Mitigated Future Units</b>	<b>Total Projected Students from Future Units</b>
Elementary School	125	285	410
Middle School	28	57	85
<b>Total</b>	<b>153</b>	<b>342</b>	<b>495</b>

### **B. Current Capacity**

Collectively, the School District's school facilities in school year 2013/2014 have a capacity of 6,064 seats per Section 17071.25 of the Education Code. Of these 6,064 seats, 4,702 are at the elementary school level and 1,362 are at the middle school level. These capacities include seats from all new school facility construction projects funded by the State. Based on student enrollment data for school year 2013/2014, the enrollment of the School District is 5,132 students. As shown in Table 5, facilities capacity exceeds student enrollment at both school levels in school year 2013/2014.

**Table 5**  
**Existing School Facilities Capacity and Student Enrollment**

<b>School Level</b>	<b>2013/2014 Facilities Capacity <sup>[1]</sup></b>	<b>2013/2014 Student Enrollment <sup>[2]</sup></b>	<b>Excess/ (Shortage) Capacity</b>
Elementary School (Grades K-6)	4,702	3,977	725
Middle School (Grades 7-8)	1,362	1,155	207
<b>Total</b>	<b>6,064</b>	<b>5,132</b>	<b>932</b>
[1] See Exhibit B for SAB Form 50-02, and Exhibit I for the Updated School Facilities Capacity Calculation.			
[2] Student enrollment from October 2013.			

### **C. Projected Unhoused Students**

As shown in Table 5, the existing facilities capacity of the School District determined in accordance with Section 65995.6(a) exceeds student enrollment currently being generated from existing residential units by 725 seats at the elementary school level and 207 seats at the middle school level. These surplus seats exist at facilities which will house (i) students generated from non-mitigated Future Units, (ii) students generated from mitigated Future Units, and (iii) students generated from units developed beyond the five-year period of the Analysis.

The School District will experience growth beyond the next five (5) years. Therefore, the surplus seats identified in Table 5 must be allocated between the Future Units shown in Table 3 and residential units to be constructed beyond the next five (5) years. According to information obtained from the San Diego Association of Governments ("SANDAG"), the School District can expect an additional 10,300 residential units through calendar year 2040. This number includes Future Units and residential units to be constructed beyond the next five (5) years. Allocating the surplus seats identified in Table 5 between Future Units and residential units to be constructed beyond the next five (5) years based on the number of students each group of units is expected to generate results in 94 surplus seats at the elementary school level and 26 surplus seats at the middle school level to be allocated over the next five (5) years.

Additionally, the surplus seats to be allocated over the next five (5) years must be apportioned between students generated from mitigated and non-mitigated Future Units (Table 4). Of the allocated surplus seats identified above, it was determined that 65 surplus seats at the elementary school level and 17 surplus at the middle school level are available to house students generated from non-mitigated Future Units. Tables 6 and 7 show the Projected Unhoused Students from mitigated and non-mitigated Future Units at each school level, while Exhibit J provides more information regarding the allocation of surplus seats.

**Table 6**  
**Projected Unhoused Students from Mitigated Future Units**

<b>School Level</b>	<b>Projected Student Enrollment</b>	<b>Surplus Seat Determination</b>	<b>Projected Unhoused Students</b>
Elementary School	125	29	96
Middle School	28	9	19
<b>Total</b>	<b>153</b>	<b>38</b>	<b>115</b>

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

<b>School Level</b>	<b>Projected Student Enrollment</b>	<b>Surplus Seat Determination</b>	<b>Projected Unhoused Students</b>
Elementary School	285	65	220
Middle School	57	17	40
<b>Total</b>	<b>342</b>	<b>82</b>	<b>260</b>

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

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Section 65995.6(b) states that the School District must identify and consider (i) surplus property, if any, owned by the School District that can be used as a school site or that is available for sale to finance school facilities, (ii) the extent to which projected enrollment growth can be accommodated at existing school facilities, and (iii) local sources that are available to finance the construction or reconstruction of school facilities needed to accommodate any growth in enrollment attributable to the construction of new residential units. Additionally, Section 65995.5(c)(2) requires the School District to subtract from the school facilities cost impact created by Future Units the amount of Local Funds that the governing board has dedicated to facilities necessitated by new residential units. To comply with Section 65995.6(b), the School District has identified and considered property it owns and has determined that it does not possess any sites that could be considered surplus. The Governing Board will review and re-adopt this Analysis annually, including a review of this determination and any need to consider property that may then be surplus to fund school facilities required to accommodate students being generated from existing residential units, or other students.

As for identifying and considering existing excess capacity that could accommodate the Projected Student Enrollment generated from non-mitigated Future Units, Table 7 in Section III.C. of this Analysis illustrates that the School District has considered and determined that 65 excess seats exist at the elementary school level and 17 excess seats exist at the middle school level and has reduced the Projected Student Enrollment generated from non-mitigated Future Units accordingly.

Finally, in accordance with Sections 65995.6(b) and 65995.5(c)(2), the School District has determined that no local sources, including Local Funds, are available to finance the construction or reconstruction of school facilities needed to accommodate any Projected Student Enrollment generated from Future Units (see Exhibit K for more detail on local sources, including Local Funds).

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## V. Alternative No. 2 Fee

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

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

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

#### 1. Per-Pupil Grant Amounts

The per-pupil grant amounts identified in Section 17072.10(a) of the Education Code were adjusted by the SAB on January 22, 2014, pursuant to Section 17072.10(b) of the Education Code. The per-pupil grant amounts specified in Section 17072.10 are adjusted annually by the SAB to reflect construction cost changes as set forth in the statewide cost index for class B construction. Further, pursuant to SAB Regulation 1859.71.2 and Section 17074.56 of the Education Code, the per-pupil grants have been increased to account for automatic fire alarm detection systems and fire sprinkler systems. Table 8 shows the base per-pupil grant amounts.

**Table 8**  
**Base Per-Pupil Grant Amounts (2014\$)**

<b>School Level</b>	<b>Per-Pupil Grant Amount</b>	<b>Additional Grants for Auto Alarm and Fire Sprinkler System</b>	<b>Base Per-Pupil Grant Amount</b>
Elementary School	\$9,921	\$178	\$10,099
Middle School	\$10,491	\$215	\$10,706

In addition to the base per-pupil grant amounts shown in Table 8, SAB Regulation 1859.76 provides additional grants for general site development on new school construction projects. Currently, these additional grants are calculated as (i) 6 percent of the base per-pupil grants for elementary and middle school projects and (ii) a grant of \$16,122 per new useable acre acquired for new school construction. To determine the general site development grant for each school level, Dolinka Group first applied the percentages mentioned above to the base per-pupil grant amounts shown in Table 8.

Second, Dolinka Group applied the grant per new useable acre mentioned above to the student capacity of future school facilities and corresponding site size requirements for the School District listed in Table 11 to derive a grant amount per student (see Exhibit L for more information on the calculation of the additional grants for general site development). Table 9 shows these additional grants as well as the total per-pupil grant amount.

**Table 9  
Total Per-Pupil Grant Amount (2014\$)**

School Level	Base Per-Pupil Grant Amount	Additional Grants for General Site Development	Total Per-Pupil Grant Amount
Elementary School	\$10,099	\$834	\$10,933
Middle School	\$10,706	\$1,182	\$11,888

Applicable law specifies the per-pupil grant amounts specified in Section 17072.10 are adjusted annually by the SAB to reflect construction cost changes as set forth in the statewide cost index for class B construction as provided in Section 17072.10(b) of the Education Code.

## **2. Total New School Construction Grants**

To determine the total new school construction grants under Section 65995.5, the number of Projected Unhoused Students to be generated from non-mitigated Future Units, as shown in Table 7, is multiplied by the total per-pupil grant amounts set forth in Section 17072.10(a) and (b) of the Education Code, as shown in Table 9. Table 10 shows the total new school construction grants of the School District pursuant to Section 65995.5(c)(1).

**Table 10  
Total New School Construction Grants for Projected  
Unhoused Students from Non-Mitigated Future Units (2014\$)  
(In Accordance with Section 65995.5(c)(1) of the Government Code)**

School Level	Projected Unhoused Students	Total Per-Pupil Grant Amount	Total New Construction Grants
Elementary School	220	\$10,933	\$2,405,260
Middle School	40	\$11,888	\$475,520
<b>Total</b>	<b>260</b>	<b>N/A</b>	<b>\$2,880,780</b>

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

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

#### a. **Site Size Requirement**

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

**Table 11**  
**Student Capacities and Site Sizes of Future School Facilities**

<b>School Level</b>	<b>Student Capacity</b>	<b>Site Size (Acres)</b>
K-8 School	850	15.9

It should be emphasized that the site sizes shown in Table 11 are based on site sizes recommended by the State Department of Education as of January 1, 1998. Since that time, the State Department of Education has prepared a revised Handbook that contains site size recommendations more consistent with School District policy. Please refer to Exhibit E for the site sizes more consistent with the revised Handbook.

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

Based on information regarding property sales within the County, the School District believes that \$146,146 per acre for site acquisition at all school levels is a reasonable estimate. As for site development, the School District estimates the cost to be approximately \$408,624 per acre (the site development cost was taken from the School Facilities Needs Analysis prepared in 2013 and adjusted by the annual change in the construction cost index as published by Marshall & Swift). Table 12 lists the total estimated site acquisition costs and site development costs of the School District in accordance with Section 65995.5(h).

**Table 12**  
**Site Acquisition and Site Development Costs of Future School Facilities (2014\$)**

School Level	Site Acquisition Cost <sup>[1]</sup>	Site Development Cost <sup>[1]</sup>	Total Site Cost
K-8 School	\$2,323,721	\$6,497,122	\$8,820,843
[1] The site acquisition and site development costs are equal to the per acre costs listed above multiplied by the number of acres, as listed in Table 11.			

**c. School Facilities Needed**

To ensure that non-mitigated Future Units are being charged an Alternative No. 2 Fee that is reasonably related to the school facilities that are required to house the Projected Unhoused Students to be generated from non-mitigated Future Units, the School District must identify the number of future school facilities that will be needed to house the Projected Unhoused Students to be generated from non-mitigated Future Units, as well as students to be generated from mitigated Future Units and residential development anticipated to occur over the next 20 years. To calculate the number of school facilities that the School District will need to adequately house the Projected Unhoused Students, the number of Projected Unhoused Students for each school level, as listed in Table 7, was divided by the applicable student capacity, as listed in Table 11. The number of school sites expected to be needed to house the Projected Unhoused Students generated from non-mitigated Future Units is shown in Table 13.

**Table 13**  
**School Facilities Needed**

School Level	Total Facilities Needed	Facilities Needed for Students Generated from Mitigated Future Units	Facilities Needed for Students Generated from Non-Mitigated Future Units
K-8 School	0.372	0.113	0.259

It is important to realize that while the number of Projected Unhoused Students from non-mitigated Future Units equates only to approximately 25.9 percent of a K-8 School, the School District will need to construct at least one (1) K-8 school, in the future to accommodate (i) students generated from mitigated Future Units, (ii) students generated from non-mitigated Future Units, and (iii) students generated from future residential units beyond the next five (5) years.

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

The calculation of the total school site acquisition and site development cost impacts under Section 65995.5(h) is a two-step process. The first step involves calculating the total school site acquisition and site development costs related to the Projected Unhoused Students generated from non-mitigated Future Units. The calculation of this first step is shown in Table 14.

**Table 14**  
**Total School Site Acquisition and Site Development**  
**Costs for Students from Non-Mitigated Future Units (2014\$)**

<b>School Level</b>	<b>Facilities Needed for Students Generated from Non-Mitigated Future Units</b>	<b>Site Cost</b>	<b>Total Site Costs <sup>[1]</sup></b>
K-8 School	0.259	\$8,820,843	\$2,284,598
[1] Numbers may not sum due to rounding.			

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

**Table 15**  
**Alternative No. 2 Fee Site Costs (2014\$)**  
**(In Accordance with Section 65995.5(h) of the Government Code)**

<b>School Level</b>	<b>Total Site Costs</b>	<b>Multiplier</b>	<b>Alternative No. 2 Fee Site Cost</b>
K-8 School	\$2,284,598	50.00%	\$1,142,299

**4. Alternative No. 2 Fee School Facility Costs**

As stated previously, the initial step in calculating the maximum Alternative No. 2 Fee is to identify (i) the total new school construction grant, and (ii) the site acquisition and development costs pursuant to Section 65995.5(h). The sum of these amounts, which is the Alternative No. 2 Fee School Facility Costs, is the maximum amount of school facility costs that may be included in the Alternative No. 2 Fee before any local fund credits are applied. For the School District, the total new school construction grant is \$2,880,780 and the total site acquisition and site development cost pursuant to Section 65995.5(h) is \$1,142,299. These costs and the Alternative No. 2 Fee School Facility Costs are shown by school level in Table 16.

**Table 16**  
**Alternative No.2 Fee School Facility Costs (2014\$)**  
**(In Accordance with Section 65995.5(c)(1) of the Government Code)**

<b>School Level</b>	<b>Total New Construction Grants</b>	<b>Alternative No. 2 Fee Site Costs</b>	<b>Alternative No. 2 Fee School Facility Costs</b>
K-8 School	\$2,880,780	\$1,142,299	\$4,023,079

## B. Credit for Local Funds

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

**Table 17**  
**Net Alternative No.2 Fee School Facility Costs (2014\$)**  
**(In Accordance with Section 65995.5(c)(2) of the Government Code)**

Item	Amounts
Alternative No. 2 Fee School Facility Costs	\$4,023,079
Credit for Existing Surplus Local Funds	\$0
<b>Net Alternative No. 2 Fee School Facility Costs</b>	<b>\$4,023,079</b>

## C. Alternative No. 2 Fee Calculation

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

### 1. Average Square Footage per Unit

In order to project the total square footage of assessable space of the non-mitigated Future Units, the Analysis must estimate the average square footage of Future SFD Units, Future SFA Units, and Future MF Units to be constructed in the School District. To estimate the average square footage of Future Units to be constructed in the School District, Dolinka Group analyzed residential square footage information for units constructed during the last five (5) years as provided by the County. These estimates were provided to Planning Departments of the City and County for additional input. Based on this information, the average Future SFD Unit to be constructed within the School District is estimated to contain 2,650 square feet, the average Future SFA Unit is estimated to contain 1,430 square feet, and the average Future MF Unit estimated to contain 1,300 square feet (see Exhibit G).

### 2. Total Square Footage of Assessable Space

To calculate the total square footage of assessable space for non-mitigated Future Units, the average square footage of Future SFD Units, Future SFA Units, and Future MF Units listed above was multiplied by the number of non-mitigated Future Units listed in Table 3. The results of this operation are shown in Table 18.

**Table 18**  
**Estimated Total Residential Square Footage**

<b>Land Use</b>	<b>Non-Mitigated Future Units</b>	<b>Average Square Footage</b>	<b>Total Square Footage</b>
Single Family Detached	275	2,650	728,750
Single Family Attached	350	1,430	500,500
Multifamily	256	1,300	332,800
<b>Total</b>	<b>881</b>	<b>N/A</b>	<b>1,562,050</b>

The projected total square footage of non-mitigated future residential units identified in Table 18 includes units that may result from Reconstruction. For additional information regarding the imposition of the Alternative No. 2 Fee and Alternative No. 3 Fee on Reconstruction please refer to Exhibit H.

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

To calculate the Alternative No. 2 Fee, the Net Alternative No. 2 Fee School Facility Costs, as listed in Table 17, were divided by the total square footage of assessable space of the non-mitigated Future Units, as listed in Table 18. Table 19 provides the Alternative No. 2 Fee that can be adopted by the School District.

**Table 19**  
**Alternative No. 2 Fee (2014\$)**

<b>Item</b>	<b>Amount/Square Footage</b>
Net Alternative No. 2 Fee School Facility Costs	\$4,023,079
Total Residential Square Footage	1,562,050
<b>Alternative No. 2 Fee</b>	<b>\$2.58</b>

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## **VI. Alternative No. 3 Fee**

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The Alternative No. 2 Fee, which is the maximum Alternative Fee that may be imposed during periods when State funds for new construction are available, was calculated in Section V in accordance with Section 65995.5. During periods when the SAB is no longer approving apportionments for new construction due to a lack of funds available, the Alternative No. 3 Fee may be imposed by a school district, subject to the suspension of Alternative No. 3 Fees as set forth in Section 65995.7(a)(3). Additionally, in accordance with Section 1859.81 of the SAB regulations, a school district requesting financial hardship assistance funding is required to impose the maximum developer fee justified by law (the Alternative No. 2 Fee, or the Alternative No. 3 Fee when the State declares that such fees can be imposed), or an alternative source greater than or equal to the amount of such fees. SB 1016, which was signed into law by Governor Brown on June 27, 2012, amended Section 65995.7(a)(3) to suspend the ability for school districts to impose the Alternative No. 3 Fee through 2014 even if the SAB is no longer approving apportionments for new construction due to a lack of funds available. Similar to the methodology of the calculations performed in Section V, this Section VI provides a calculation of the Alternative No. 3 Fee in accordance with Section 65995.7.

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

Pursuant to Section 65995.7, the Alternative No. 3 Fee School Facility Cost, which is the maximum amount of school facility costs that may be included in the Alternative No. 3 Fee, is calculated by increasing the Net Alternative No. 2 Fee School Facility Costs by an amount not to exceed the Alternative No. 2 Fee School Facility Costs. As required by Section 65995.7, this amount has been reduced by the amount of local funds (\$0 in the case of the School District) identified pursuant to Section 65995.5(c)(2). Accordingly, Table 20 shows the Net Alternative No. 2 Fee School Facility Costs previously shown in Table 17, and adds to that amount the Alternative No. 2 Fee School Facility Costs previously shown in Table 16. The result, shown in Table 20, is the Alternative No. 3 Fee School Facility Costs.

**Table 20**  
**Alternative No. 3 Fee School Facility Costs (2014\$)**  
**(In Accordance with Section 65995.7 of the Government Code)**

<b>Item</b>	<b>Amounts</b>
Net Alternative No. 2 Fee School Facility Costs	\$4,023,079
Alternative No. 2 Fee School Facility Costs	\$4,023,079
<b>Alternative No. 3 Fee School Facility Costs</b>	<b>\$8,046,158</b>

**B. Alternative No. 3 Fee Calculation**

To calculate the Alternative No. 3 Fee, the Alternative No. 3 Fee School Facility Costs were divided by the total square footage of assessable space of the non-mitigated Future Units listed in Table 18. This calculation is required by Section 65995.5(c)(3) and outlined in Section V.C. of the Analysis. Table 21 provides the Alternative No. 3 Fee that can be levied by the School District on new residential development where permitted by applicable law.

**Table 21**  
**Alternative No. 3 Fee (2014\$)**

<b>Item</b>	<b>Amount/Square Footage</b>
Alternative No. 3 Fee School Facility Costs	\$8,046,158
Total Residential Square Footage	1,562,050
<b>Alternative No. 3 Fee</b>	<b>\$5.15</b>

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## VII. Section 66000 of the Government Code

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

1. Determine the purpose of the fee.
2. Identify the facilities to which the fee will be put.
3. Determine that there is a reasonable relationship between the need for public facilities and the type of development on which a fee is imposed.
4. Determine that there is a reasonable relationship between the amount of the fee and the public facility or portion of the public facility attributable to the development on which the fee is imposed.
5. Provide an annual accounting of any portion of the fee remaining unexpended or uncommitted in the School District's accounts.

New residential development in the School District, as shown in the Analysis, will generate additional students who will require the School District to provide additional school facilities. The amount to be included in the Alternative Fees is specified by statute. The Alternative No. 2 Fee of \$2.58 per square foot and the Alternative No. 3 Fee of \$5.15 per square foot are justified in the Analysis. The estimated average school facilities cost impacts on the School District per square foot of residential development as estimated in Exhibit E is \$10.29. As the actual school facilities cost impacts per square foot of residential construction is greater than the Alternative Fees, it is reasonable for the School District to determine that the Alternative No. 2 Fee of \$2.58 per square foot and the Alternative No. 3 Fee of \$5.15 per square foot are roughly proportional and reasonably related to the actual impacts caused by residential development on the School District.

This Analysis and the information included in Exhibit E therefore establish that the Alternative Fees meet the requirements of Sections 66000 *et seq.* and such a determination by the School District as part of adopting the Alternative Fees is justified and appropriate. The School District, therefore, is justified in levying Alternative Fees on all new development.

By way of summary, the Analysis shows that non-mitigated Future Units will produce additional elementary school and middle school school students and that the School District does not have the capacity or funds to accommodate all of those additional students. Alternative Fees, therefore, will be used to fund (i) new elementary school and middle school facilities, (ii) expansion of existing elementary school and middle school facilities, and (iii) other upgrades to existing school facilities, but only to the extent that such items are needed to accommodate the Projected Unhoused Students generated from Future Units and to the extent that the use of the Alternative Fees on such items is permitted by applicable law.

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**Exhibit A**

**Current SAB Form 50-01**

STATE OF CALIFORNIA  
**ENROLLMENT CERTIFICATION/PROJECTION**  
 SAB 50-01 (REV 05/09)

STATE ALLOCATION BOARD #5  
 OFFICE OF PUBLIC SCHOOL CONSTRUCTION  
 Page 6 of 6

SCHOOL DISTRICT San Ysidro School District	FIVE DIGIT DISTRICT CODE NUMBER (see California Public School Directory) 68379
COUNTY San Diego	HIGH SCHOOL ATTENDANCE AREA (HSAA) OR SUPER HSAA (if applicable)

Check one: ☐ Fifth-Year Enrollment Projection ☒ Tenth-Year Enrollment Projection  
 HSAA Districts Only - Check one: ☐ Attendance ☐ Residency  
☐ Residency - COS Districts Only - (Fifth Year Projection Only)

<input type="checkbox"/> Modified Weighting (Fifth-Year Projection Only)	3rd Prev. to 2nd Prev.	2nd Prev. to Prev.	Previous to Current
<input type="checkbox"/> Alternate Weighting - (Fill in boxes to the right):			

Part G. Number of New Dwelling Units  
 (Fifth-Year Projection Only)

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

Part I. Projected Enrollment

1. Fifth-Year Projection

Enrollment/Residency - (except Special Day Class pupils)

K-6	7-8	9-12	TOTAL

Special Day Class pupils only - Enrollment/Residency

	Elementary	Secondary	TOTAL
Non-Severe			
Severe			
TOTAL			

2. Tenth-Year Projection

Enrollment/Residency - (except Special Day Class pupils)

K-6	7-8	9-12	TOTAL
5089	1460	0	6549

Special Day Class pupils only - Enrollment/Residency

	Elementary	Secondary	TOTAL
Non-Severe	161	109	270
Severe	21	11	32
TOTAL	182	120	

Part A. K-12 Pupil Data

Grade	7th Prev. 2004 / 2005	6th Prev. 2005 / 2006	5th Prev. 2006 / 2007	4th Prev. 2007 / 2008	3rd Prev. 2008 / 2009	2nd Prev. 2009 / 2010	Previous 2010 / 2011	Current 2011 / 2012
K	523	492	534	560	475	468	525	571
1	528	547	512	578	555	524	517	588
2	538	548	513	521	546	551	539	560
3	530	534	554	548	501	526	542	576
4	550	526	529	572	520	514	531	562
5	558	560	533	574	537	521	521	574
6	498	591	570	604	552	528	506	542
7	591	542	606	639	666	579	482	591
8	620	631	562	622	582	640	564	578
9	0	0	0	0	0	0	0	0
10	0	0	0	0	0	0	0	0
11	0	0	0	0	0	0	0	0
12	0	0	0	0	0	0	0	0
TOTAL	4936	4971	4913	5218	4934	4851	4727	5140

Part B. Pupils Attending Schools Chartered By Another District

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

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

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

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

	Elementary	Secondary	TOTAL
Non-Severe	126	81	207
Severe	16	8	24
TOTAL	142	89	

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

7th Prev.	6th Prev.	5th Prev.	4th Prev.	3rd Prev.	2nd Prev.	Previous	Current
2004 / 2005	2005 / 2006	2006 / 2007	2007 / 2008	2008 / 2009	2009 / 2010	2010 / 2011	2011 / 2012

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

☐ County Birth Data ☐ Birth Data by District ZIP Codes ☐ Estimate ☐ Estimate ☐ Estimate

8th Prev.	7th Prev.	6th Prev.	5th Prev.	4th Prev.	3rd Prev.	2nd Prev.	Previous	Current

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

- I am designated as an authorized district representative by the governing board of the district.
- If the district is requesting an augmentation in the enrollment projection pursuant to Regulation Section 1859.42.1 (a), the local planning commission or approval authority has approved the tentative subdivision map used for augmentation of the enrollment and the district has identified dwelling units in that map to be contracted. All subdivision maps used for augmentation of enrollment are available at the district for review by the Office of Public School Construction (OPSC).
- This form is an exact duplicate (verbatim) of the form provided by the Office of Public School Construction. In the event a conflict should exist, then the language in the OPSC form will prevail.

NAME OF DISTRICT REPRESENTATIVE (PRINT OR TYPE) Dena Whittington	
SIGNATURE OF DISTRICT REPRESENTATIVE 	
DATE 10-31-11	TELEPHONE NUMBER (619) 428-4476 ext 3004
E-MAIL ADDRESS dwhittington@synd.k12.ca.us	

**Exhibit B**

**Current SAB Form 50-02**

STATE OF CALIFORNIA

## EXISTING SCHOOL BUILDING CAPACITY

SAB 60-02 (Rev. 07/01) Exempt (Rev. 03/03/2002)

SCHOOL DISTRICT

SAN YSIDRO ELEMENTARY

COUNTY

SAN DIEGO

STATE ALLOCATION BOARD

OFFICE OF PUBLIC SCHOOL CONSTRUCTION

Page 4 of 4

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

68379

HIGH SCHOOL ATTENDANCE AREA (MSAA) OR SUPER HSEA (if applicable)

PART I - Classroom Inventory ☐ NEW ☐ ADJUSTED

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

## PART II - Available Classrooms

## Option A.

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

## Option B.

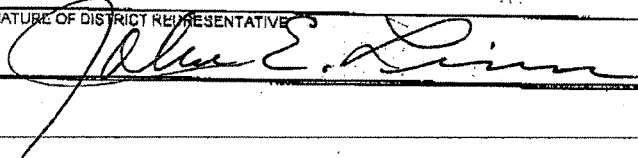
	K-6	7-8	9-12	Non-Severe	Severe	Total
a. Part I, line 8	129	31		1	12	173
b. Part I, lines 1, 2, 5 and 6 (total only)						47
c. 25 percent of Part I, line 7 (total only)						31
d. Subtract c from b (enter 0 if negative)	12				4	16
e. Total (a minus d)	117	31		1	8	157

## PART III - Determination of Existing School Building Capacity

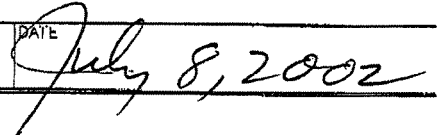
	K-6	7-8	9-12	Non-Severe	Severe
Line 1. Classroom capacity	2,925	837		13	72
Line 2. SER adjustment	137	39		1	3
Line 3. Operational Grants					
Line 4. Greater of line 2 or 3	137	39		1	3
Line 5. Total of lines 1 and 4	3,062	876		14	75

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

SIGNATURE OF DISTRICT REPRESENTATIVE



DATE



**Exhibit C**

**Current SAB Form 50-03**

STATE OF CALIFORNIA

STATE ALLOCATION BOARD

**ELIGIBILITY DETERMINATION**

OFFICE OF PUBLIC SCHOOL CONSTRUCTION

Page 4 of 4

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

SCHOOL DISTRICT

SAN YSIDRO ELEMENTARY

BUSINESS ADDRESS

4350 Otay Mesa Road

CITY

San Diego, CA 92173-1685

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

66379

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

COUNTY

SAN DIEGO

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

DISTRICT REPRESENTATIVE

John Linn

TELEPHONE NUMBER

Business Manager

E-MAIL ADDRESS

jlinn@sysd.k12.ca.us

DISTRICT REPRESENTATIVE

TELEPHONE NUMBER

E-MAIL ADDRESS

**Part II - New Construction Eligibility** ☐ NEW ☒ ADJUSTED

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

**Part III - Modernization Eligibility** ☐ NEW ☐ ADJUSTED**1. SCHOOL NAME:**

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

**Option B**

2. Permanent space at least 25 years old (report by classroom or square footage)					
3. Portable space at least 20 years old (report by classroom or square footage)					
4. Total (lines 2 and 3)					
5. Remaining permanent and portable space (report by classroom or square footage)					
6. Total (lines 4 and 5)					
7. Percentage (divide line 4 by line 6)		0%			
	K-6	7-8	9-12	Non-Severe	Severe
8. CBEDS enrollment at school site					
9. Modernization eligibility (multiply line 7 by each grade group on line 8)					

I certify, as the District Representative, that the information reported on this form is true and correct and that:

I am designated as an authorized district representative by the governing board of the district; and:

A resolution or other appropriate documentation supporting this application under Chapter 12.5, Part 10, Division 1, commencing with Section 17070.10, et seq., of the Education Code was adopted by the School District's Governing Board

on

and,

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

SIGNATURE OF DISTRICT REPRESENTATIVE


DATE

John Linn

July 8, 2002

**Exhibit D**


**Eligibility Determination from the SAB**



California Department of  
General Services

CA.gov | DGS | OPSC | Project Tracking

PROJECT TRACKING | PTN GENERATOR | REPORTS

 District Main Page

[Return to Search Results](#)

District: San Ysidro Elementary  
District Rep: Ms. Dena Whittington

New Construction Eligibility

District Code	Attendance Area	Original SAB Approval Date	Recent SAB Approval
68379	0	2/23/2000	4/25/2012

SAB 50-03 New Construction Eligibility Information

New Construction Baseline Eligibility

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

SAB 50-03 Eligibility Document Status/Dates

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

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**Exhibit E**

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

**San Ysidro School District**  
**School Facility Cost Impacts per Residential Square Foot**  
**February 2014**

**School Facility Costs**

School Level	Site Acquisition Cost	Construction Cost	Total Cost
K-8 School	\$2,528,326	\$37,412,862	\$39,941,188

**Costs per Student**

School Level	Total Cost	Students Housed	Cost per Student
K-8 School	\$39,941,188	850	\$46,990

**School Facility Cost Impacts per Residential Unit**

School Level	Cost per Student	Weighted Average SGR	Cost per Unit
K-8 School	\$46,990	0.3882	\$18,242
<b>Total School Facility Cost Impact</b>			<b>\$18,242</b>
Average Square Footage <sup>[1]</sup>			1,773
<b>School Facility Cost Impact per Square Foot</b>			<b>\$10.29</b>
[1] See Table 18 of the Analysis.			

**San Ysidro School District**  
**Summary of Estimated Costs**  
**K-8 School**  
**February 2014**

<b>A. Site</b>				<b>\$2,568,326</b>
	Purchase Price of Property		\$2,528,326	
	Acres <sup>[1]</sup> :	17.3		
	Cost/Acre:	\$146,146		
	EIR		\$20,000	
	Appraisals		\$10,000	
	Surveys		\$5,000	
	Escrow/Title		\$5,000	
	[1] Assumes Net Usable Acres.			
<b>B. Plans</b>				<b>\$1,982,625</b>
	Architect's Fee		\$1,781,250	
	Preliminary Tests		\$20,000	
	DSA/SDE Plan Check		\$161,375	
	Energy Fee Analysis		\$15,000	
	Other		\$5,000	
<b>C. Construction</b>				<b>\$31,875,000</b>
	(Includes Construction, Site Development, General Site Development, and Technology)			
	Square Feet / Student	100		
	Cost / Square Feet	\$375		
<b>D. Tests</b>				<b>\$50,000</b>
<b>E. Inspection</b>				<b>\$144,000</b>
	(\$12,000 per month for 12 months)			
<b>F. Furniture and Equipment</b>				<b>\$705,500</b>
	(\$5 per Square Foot, includes Cost Index Adjustment of 66%)			
<b>G. Contingency</b>				<b>\$561,882</b>
	(\$2,000 + 1.5% of items A-F)			
<b>H. Items Not Funded by the State</b>				<b>\$2,053,855</b>
	Technology (5% of Construction)		\$1,593,750	
	Library Books (8 books/student @ \$15)		\$102,000	
	Landscaping (\$0.44/sq. ft x 17.3 acres)		\$331,579	
	Landscape Architect Fees (8% of Landscaping)		\$26,526	
<b>I. Total Estimated Cost</b>				<b>\$39,941,188</b>

Summary	
School Facilities Capacity - Traditional Calendar	850
School Facilities Cost per Student - Traditional Calendar	\$46,990

**Exhibit F**

**Bonding Capacity Calculation**

**San Ysidro School District  
Bonding Capacity Calculation  
Fiscal Year 2013/2014**

Description	Value
(6) Taxable property of the District excluding unitary and operating nonunitary property described above	\$4,419,048,617
(8) Enter applicable percentage bond debt limit Section 15102 (School District) 1.25% <sup>[1]</sup> Section 15108 (Unified School District) 2.5%	3.00%
(9) Bonding capacity	\$132,571,459
(10) Senate Bill 50 local bonding capacity threshold 15% of District's local bonding capacity	\$19,885,719
(11) Senate Bill 50 local bonding capacity threshold 30% of District's local bonding capacity	\$39,771,438

[1] SYSD's bonding capacity increased to 3.00% based on bonding capacity waiver approved by the State Board of Education dated March 26, 2012.

Source: San Diego County Office of the Auditor-Controller

**Exhibit G**

**Correspondence with the City and County**

February 14, 2014

Ms. Sara Osborn  
Senior Planner  
City of San Diego Planning Division  
1222 First Avenue, MS 413  
San Diego, CA 92101

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

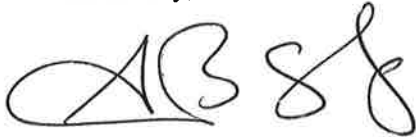
Dear Ms. Osborn,

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

Projections regarding the Future Units to be constructed within the area of the City served by the School District are shown on the following page. Based on information previously obtained from the City and the School District, Dolinka Group has prepared Future Unit estimates and Future Unit square footage estimates for the School District. Dolinka Group would like to provide the City with the opportunity to review, and if necessary, modify these projections. Please complete the attached page ("Certificate") and return to Dolinka Group by **February 25, 2014.**

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

Sincerely,

A handwritten signature in black ink, appearing to read 'AB 88'.

Andrew Bishop  
Associate Director

S:\Clients\San Ysidro School District\Demographics\SFNA\SY1314\Correspondence\20140214\_SOsbornSanDiego.doc

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

\_\_\_The City concurs with the residential development projections as provided below:

Unit Type	Projected Number of Units <sup>[1]</sup>	Estimated Average Square Footage per Unit
Single Family Detached (i.e. single family home)	275	2,650
Single Family Attached (e.g. condos, townhomes, etc.)	350	1,430
Multifamily (i.e. apartments, duplexes, triplexes, etc.)	650	1,300

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

\_\_\_The residential development projected by the City is listed below:

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

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

Signed, \_\_\_\_\_, of the City of San Diego on \_\_\_\_\_.

Printed Name: \_\_\_\_\_

Title: \_\_\_\_\_

February 14, 2014

Ms. Beth Murray  
Assistant Director  
Planning & Developmental Services  
5510 Overland Avenue  
San Diego, CA 92123

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

Dear Ms. Murray,

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

Projections regarding the Future Units to be constructed within the area of the County served by the School District are shown on the following page. Based on information previously obtained from the County and the School District, Dolinka Group has prepared Future Unit estimates and Future Unit square footage estimates for the School District. Dolinka Group would like to provide the County with the opportunity to review, and if necessary, modify these projections. Please complete the attached page ("Certificate") and return to Dolinka Group by **February 25, 2014.**

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

Sincerely,

A handwritten signature in black ink, appearing to read 'AB88', written over a horizontal line.

Andrew Bishop  
Associate Director

S:\Clients\San Ysidro School District\Demographics\SFNA\SY1314\Correspondence\20140214\_BMurrayCounty.doc

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

\_\_\_The County concurs with the residential development projections as provided below:

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

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

\_\_\_The residential development projected by the County is listed below:

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

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

Signed, \_\_\_\_\_, of the County of San Diego on \_\_\_\_\_.

Printed Name: \_\_\_\_\_

Title: \_\_\_\_\_

**Exhibit H**

**Reconstruction**

Reconstruction is the act of replacing existing structures with new construction, which may have an alternative land use (i.e. commercial/industrial versus residential) or may consist of different residential unit types (e.g., single family detached versus multifamily, etc.).

#### **A. Residential Reconstruction**

Residential Reconstruction consists of voluntarily demolishing existing residential units and replacing them with new residential development. To the extent Reconstruction increases the residential square footage beyond what was demolished ("New Square Footage"), the increase in square footage is subject to the applicable Alternative No. 2 Fee or Alternative No. 3 Fee as such construction is considered new residential development. As for the amount of square footage constructed that replaces only the previously constructed square footage ("Replacement Square Footage"), the determination of the applicable fee, if any, is subject to a showing that the Replacement Square Footage results in an increase in student enrollment and, therefore, an additional impact being placed on the School District to provide school facilities for new student enrollment.

As of the date of this Analysis, the large-scale Reconstruction of residential development within the School District has not occurred to the point where statistically significant data can be utilized to determine if Replacement Square Footage increases student enrollment. Therefore, prior to the imposition of fees on Replacement Square Footage, the School District may undertake an analysis on any future proposed project(s) and may amend/update this Analysis. Such analysis will examine the extent to which an increase in enrollment can be expected from Replacement Square Footage due to any differential in student generation rates as identified in the Analysis for the applicable unit types between existing square footage and Replacement Square Footage. To the extent it can be demonstrated that Replacement Square Footage will increase student enrollment, the School District may then impose a fee on the Replacement Square Footage. This fee amount on Replacement Square Footage shall be calculated by determining the cost impacts associated with any growth in student enrollment from the Replacement Square Footage. Any such fee that is calculated for the Replacement Square Footage shall not exceed the Alternative No. 2 Fee or Alternative No. 3 Fee that is in effect at such time.

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

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

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

**Exhibit I**

**Updated School Facilities Capacity Calculation**

# San Ysidro School District

## School Facilities Capacity Calculation

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

**Exhibit J**

**Allocation of Surplus Seats**

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

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

<b>Item</b>	<b>School Year 2013/2014</b>
Actual Elementary School Students	3,977
Existing Elementary School Facilities Capacity	4,702
<b>Excess Elementary School Seats</b>	<b>725</b>
Actual Middle School Students	1,155
Existing Middle School Facilities Capacity	1,362
<b>Excess Middle School Seats</b>	<b>207</b>

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

<b>Item</b>	<b>Number of Future Units</b>	<b>Number of Total Units<sup>[1]</sup></b>
Number of SFD Units	275	1,241
Number of SFA Units	350	3,261
Number of MF Units	650	5,798
[1] Source: San Diego Association of Governments ("SANDAG")		

**Percent of Students Generated from Future Units**

<b>Item</b>	<b>Students Generated from Future Units</b>	<b>Students Generated from Total Units</b>
Elementary School Students from SFD Units	117	526
Elementary School Students from SFA Units	87	809
Elementary School Students from MF Units	206	1,841
<b>Total Elementary School Students Generated</b>	<b>410</b>	<b>3,176</b>
Middle School Students from SFD Units	22	101
Middle School Students from SFA Units	17	160
Middle School Students from MF Units	46	408
<b>Total Middle School Students Generated</b>	<b>85</b>	<b>669</b>
<b>Percent of Elementary School Students Generated from Future Units</b>		<b>12.91%</b>
<b>Percent of Middle School Students Generated from Future Units</b>		<b>12.71%</b>

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

<b>School Level</b>	<b>Excess Seats</b>	<b>% of Students Generated from Future Units</b>
Elementary School	725	12.91%
Middle School	207	12.71%
<b>Excess Elementary School Seats Allocated Students Generated from Future Units</b>		<b>94</b>
<b>Excess Middle School Seats Allocated Students Generated from Future Units</b>		<b>26</b>

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

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

<b>Item</b>	<b>Non-Mitigated Future Units</b>	<b>Total Future Units</b>
Number of SFD Units	275	275
Number of SFA Units	350	350
Number of MF Units	256	650

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

<b>Item</b>	<b>Students Generated from Non-Mitigated Future Units</b>	<b>Students Generated from Total Future Units</b>
Elementary School Students from SFD Units	117	117
Elementary School Students from SFA Units	87	87
Elementary School Students from MF Units	81	206
<b>Total Elementary School Students Generated</b>	<b>285</b>	<b>410</b>
Middle School Students from SFD Units	22	22
Middle School Students from SFA Units	17	17
Middle School Students from MF Units	18	46
<b>Total Middle School Students Generated</b>	<b>57</b>	<b>85</b>
<b>Percent of Elementary School Students Generated from Non-Mitigated Future Units</b>		<b>69.51%</b>
<b>Percent of Middle School Students Generated from Non-Mitigated Future Units</b>		<b>67.06%</b>

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

<b>School Level</b>	<b>Excess Seats</b>	<b>% of Students Generated from Non-Mitigated Future Units</b>
Elementary School	94	69.51%
Middle School	26	67.06%
<b>Excess Seats Allocated to Elementary School Students</b>		<b>65</b>
<b>Excess Seats Allocated to Middle School Students</b>		<b>17</b>

**Exhibit K**

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

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

## **1. Lease Financings**

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

On January 31, 2012 the School District issued its 2012 COPs in the amount of \$10,409,714.55. These COPs were issued to help fund the acquisition, construction, furnishing, equipping, and completion of Vista del Mar Elementary School as well as the acquisition, construction, renovation, improvement, furnishing, equipping, delivery, and installation of new construction and modernization projects. Due to the fact that these school facilities will house students generated beyond the five (5) year range of the Analysis, the \$10,409,714.55 identified above was apportioned between students generated from non-mitigated Future Units and students to be generated beyond the next five (5) years. It was determined that, at this time, \$1,049,523 is available to house students generated from non-mitigated Future Units over the next five (5).

## **2. General Obligation Bonds**

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

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

On June 28, 2011 the School District issued the General Obligation Bonds, 1997 Election, Series F ("Series F") in the amount of \$17,599,622.90. These bonds were issued to help fund the renovation and modernization of Beyer Elementary School as well as for the acquisition, construction, and completion of Vista del Mar Elementary School. Due to the fact that these school facilities will house students generated beyond the five (5) year range of the Analysis, the \$17,599,622.90 identified above was apportioned between students generated from non-mitigated Future Units and students to be generated beyond the next five (5) years. It was determined that, at this time, \$1,774,421 is available to house students generated from Future Units over the next five (5).

On May 15, 2012 the School District issued the General Obligation Bonds, 1997 Election, Series G ("Series G") in the amount of \$28,990,883.60. These bonds were issued to help fund the renovation and modernization of Beyer Elementary School as well facilities enhancements at Willow, Sunset, San Ysidro, Smythe, and La Mirada Schools to insure that older school facilities are on parity with the School District's new school Facilities. Therefore, no proceeds from Series G are available to offset the impact of projected unhoused students from non-mitigated Future Units.

Of the original \$250,000,000 in GO bonds authorized by the voters of the School District, the School District has issued \$141,512,611.30. The School District still has \$108,487,388.70 in available GO bond authorization.

### **3. Redevelopment Pass-Throughs**

California redevelopment law allows school districts to share in tax increment income via pass-through agreements with local redevelopment agencies. The passage of AB X1 26 eliminated redevelopment agencies as of February 1, 2012, and replaced them with successor agencies. Though redevelopment agencies have been eliminated, local educational agency's pass-through entitlements remain.

The School District currently has pass-through agreements with the City of San Diego. Funds received from the City as a result of this agreement are pledged to the repayment of outstanding COPs. Therefore, there are no funds available at this time to this time to offset the impacts of non-mitigated Future Units.

### **4. Community Facilities Districts**

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

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

**5. School Fees**

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

The School District currently collects such fees in the amount of \$0.311 per square foot. In the previous five (5) years, the School District collected approximately \$338,463 in School Fees from commercial/industrial development. A similar amount of commercial/industrial School Fees can be expected to be received over the following five (5) years. This potential funding will be discussed further below.

**6. Identification of Existing Surplus Local Funds**

Over the next five (5) years, the School District will need to construct school facilities to house students to be generated from Future Units. Using per-student costs calculated in Exhibit E, providing adequate school facilities to the 260 Projected Unhoused Students identified in Section III.C will have a cost of \$12,174,840. Table K-1 shows a summary of the school facilities needs of the School District.

**Table K-1  
Identification of School Facilities Needs (2014\$)**

Item	Amount
Future Unhoused Student Impact	\$12,174,840

As stated above, the School District has identified the following local funds: (i) \$1,049,523 in available COP Proceeds, (ii) \$1,774,421 in available GO Bond Proceeds, and (iii) potential commercial/industrial school fees in the amount of \$338,463. In addition, the School District also plans to pursue State funding for the construction of school facilities to adequately house students generated from existing residential development and Future Units. Based on the current per-pupil grant amounts established by the State and the School District's site costs, the 260 Projected Unhoused Students would generate \$4,023,079 in State funding. (Although State funding is not currently available, this Analysis assumes that State funding will be available in the future in the amount identified.) Additionally, based on Table 17 of the Analysis, the School District can expect to receive \$4,023,079 from Alternative No. 2 Fees on new residential development. Table K-2 summarizes potential funding sources to fund the school facilities needs identified in Table K-1.

**Table K-2**  
**Identification of Local Funds (2014\$)**

<b>Item</b>	<b>Amount</b>
Available COP Proceeds	\$1,049,523
Available GO Bond Proceeds	\$1,774,421
Projected Commercial/Industrial School Fees	\$338,463
State Funding for Projected Unhoused Students	\$4,023,079
Projected Alternative No. 2 Fees	\$4,023,079
<b>Total</b>	<b>\$11,208,565</b>

As shown below in Table K-3, when considering the current and future school needs of the School District, there is currently a \$966,275 funding shortfall. Therefore, the School District does not have surplus funds available to offset the cost impact of Future Units.

**Table K-3**  
**Identification of Funding Shortfall (2014\$)**

<b>Item</b>	<b>Amount</b>
School Facilities Needs	\$12,174,840
Local Funding Sources	(\$11,208,565)
<b>Remaining Funding Shortfall</b>	<b>\$966,275</b>

**Exhibit L**

**Calculation of Additional Grants for General Site Development**

# San Ysidro School District

## General Site Development Grant per Student Calculation

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

School Level	Base Per-Pupil Grant <sup>[1]</sup>	Percent	Additional Grant
Elementary School	\$10,099	6.00%	\$606
Middle School	\$10,706	6.00%	\$642
[1] Includes Automatic Fire Detection/Sprinkler Grant.			

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

School Level	Grant per New Usable Acre	Site Size	Grant per School Facility
Elementary School	\$16,122	9.2	\$148,322
Middle School	\$16,122	6.7	\$108,017

### 2b. Calculation of Grant Amount per Student at Each School Level

School Level	Grant per School Facility	Facility Capacity	Grant per Student
Elementary School	\$148,322	650	\$228
Middle School	\$108,017	200	\$540

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

School Level	Additional Grant as a percentage of Base Per-Pupil Grant	Grant per Student	Total Grant for General Site Development
Elementary School	\$606	\$228	\$834
Middle School	\$642	\$540	\$1,182