

Strathmore Union Elem. School District

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2012 Developer Fee
Justification Study
for
Strathmore Union Elem.
School District

Shelly Long, Ed.D.
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I. Background

Education Code Section 17620 allows school districts to assess fees on new residential and commercial construction within their respective boundaries. These fees can be collected without special city or county approval, to fund the construction of new school facilities necessitated by the impact of residential and commercial development activity. In addition, these fees can also be used to fund the reconstruction of school facilities or reopening schools to accommodate development-related enrollment growth. Fees are collected immediately prior to the time of the issuance of a building permit by the City or the County.

As enrollment increases, additional school facilities will be needed to house the growth in the student population. Because of the high cost associated with constructing school facilities and the District's limited budget, outside funding sources are required for future school construction. State and local funding sources for the construction and/or reconstruction of school facilities are limited.

The authority cited in Education Code Section 17620 states in part "... the governing board of any school district is authorized to levy a fee, charge, dedication or other form of requirement against any development project for the construction or reconstruction of school facilities." The legislation originally established the maximum fee rates at \$1.50 per square foot for residential construction and \$0.25 per square foot for commercial/industrial construction. Government Code Section 65995 provides for an inflationary increase in the fees every two years based on the changes in the Class B construction index. As a result of these adjustments, the fees authorized by Education Code 17620 are currently \$3.20 per square foot of residential construction and \$0.51 per square foot of commercial or industrial construction.

This developer fee justification study demonstrates that the Strathmore Union Elementary School District requires the full statutory impact fee to accommodate growth from development activity. The District currently assesses a fee of \$2.97 and \$0.47 for residential and commercial/industrial construction, respectively. The increase represents \$0.23 per square foot and \$0.04 per square foot for residential and commercial/industrial construction, respectively. The District share of the developer fees is 69.23 percent. The following table shows the impacts of the new fee amounts:

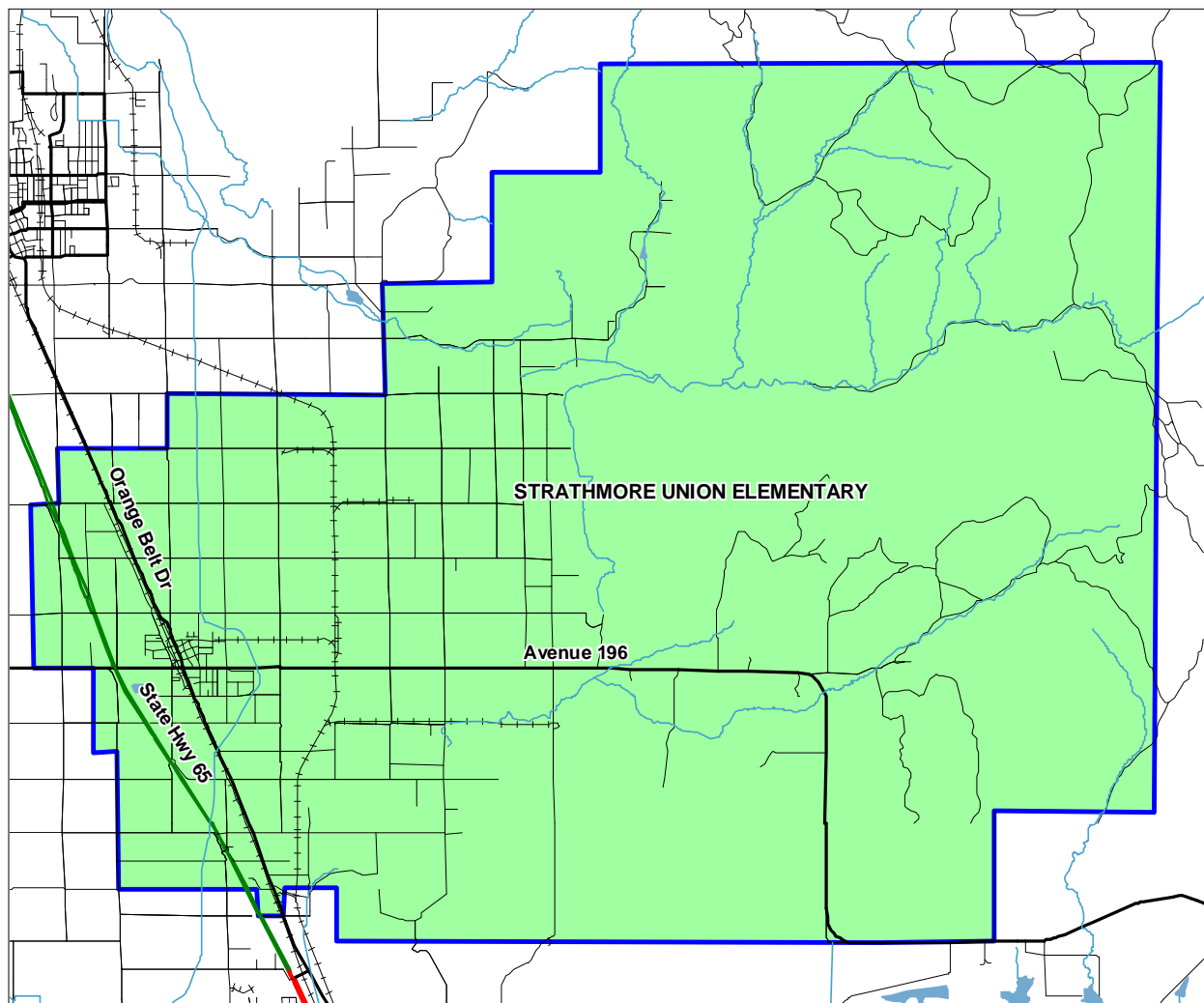
Table 1

**STRATHMORE UNION ELEMENTARY
Developer Fee Collection Rates**

Totals	<u>Previous</u>	<u>New</u>	<u>Change</u>
Residential	\$2.97	\$3.20	\$0.23
Commercial/Ind.	\$0.47	\$0.51	\$0.04
District Share:	69.23%		
Net Impact	<u>Previous</u>	<u>New</u>	<u>Change</u>
Residential	\$2.06	\$2.22	\$0.16
Commercial/Ind.	\$0.33	\$0.35	\$0.02

District Map

The following map shows the extent of the areas for which development fees are applicable to the Strathmore Union Elementary School District.



II. Purpose and Intent

Prior to levying developer fees, a district must demonstrate and document that a reasonable relationship exists between the need for new or reconstructed school facilities and residential, commercial and industrial development. The justification for levying fees is required to address three basic links between the need for facilities and new development. These links or nexus are:

Burden Nexus: A district must identify the number of students anticipated to be generated by residential, commercial and industrial development. In addition, the district shall identify the school facility and cost impact of these students.

Cost Nexus: A district must demonstrate that the fees to be collected from residential, commercial and industrial development will not exceed the cost of providing school facilities for the students to be generated from the development.

Benefit Nexus: A district must show that the construction or reconstruction of school facilities to be funded by the collection of developer fees will benefit the students generated by residential, commercial and industrial development.

The purpose of this report is to document if a reasonable relationship exists between residential, commercial and industrial development and the need for additional facilities in the Strathmore Union Elementary School District.

Following in this report will be figures indicating the current enrollment and the projected growth occurring within the attendance boundaries of the Strathmore Union Elementary School District. This projected growth will then be loaded into existing facilities to the extent of available space. Thereafter, the needed facilities will be determined and an estimated cost will be assigned. The cost of the facilities will then be compared to the area of residential, commercial and industrial development to determine the amount of developer fees justified.

III. Enrollment Projections

In 2011/2012 the District's total enrollment (CBEDS) was 837 students. The enrollment by grade level is shown here in Table 2.

Table 2

**STRATHMORE UNION ELEMENTARY
CURRENT ENROLLMENT**

Grade	2011/2012
K	100
1	107
2	102
3	100
4	96
5	76
6	82
<hr/>	
K-6 Total	663
7	91
8	83
<hr/>	
7-8 Total	174
<hr/> <hr/>	
K-8 Total	837

This data will be the basis for the enrollment projections which will be presented later after a review of the development projections and the student generation factors.

Student Generation Factor

In determining the impact of new development, the District is required to show how many students will be generated from the new developments. In order to ensure that new development is paying only for the impact of those students that are being generated by new homes and businesses, the student generation factor is applied to the number of new housing units to determine development-related growth. The District may either use the local student yield rate or the State-wide average student generation factor.

The student generation factor identifies the number of students per housing unit and provides a link between residential construction projects and projections of increased enrollment. The State-wide factor used by the Office of Public School Construction is 0.50 for grades K-8. For the purposes of this report we will use the State factors to determine the students generated from new housing developments. Table 3 shows the student generation factors for the various grade groupings.

Table 3

STUDENT GENERATION FACTORS

<u>Grades</u>	<u>Students per Household</u>
K-6	0.4
7-8	0.1
Total	0.5

New Residential Development Projections

The Strathmore Union Elementary School District has experienced an average new residential construction rate of approximately 10 units per year. Projecting the average rate forward, we would expect that 50 units of residential housing will be built within the District boundaries over the next five years.

To determine the impact of residential development, an enrollment projection is done. Applying the student generation factor of 0.5 to the projected 50 units of residential housing, we expect that 25 students will be generated from the new residential construction over the next five years. This includes 20 elementary school students and 5 middle school students.

The District is required to use the development-based enrollment projection for the purposes of this study. This is utilized as the cost basis for development impact throughout this study, unless otherwise noted.

Table 4

**STRATHMORE UNION ELEMENTARY
FIVE YEAR ENROLLMENT PROJECTIONS**

<u>Grades</u>	<u>Current Enrollment</u>	<u>Development Projection</u>	<u>Projected Enrollment</u>
K to 6	663	20	683
7 to 8	174	5	179
Totals	837	25	862

IV. Existing Facility Capacity

To determine the need for additional school facilities, the capacity of the existing facilities must be identified and compared to current and anticipated enrollments. The District’s existing building capacity will be calculated using the State classroom loading standards shown in Table 6. The following types of “support-spaces” necessary for the conduct of the District’s comprehensive educational program, are not included as “teaching stations,” commonly known as “classrooms” to the public:

Table 5

**Strathmore Union Elementary School District
List of Core and Support Facilities**

Library	Resource Specialist
Multipurpose Room	Gymnasium
Office Area	Lunch Room
Staff Workroom	P.E. Facilities

Because the District requires these types of support facilities as part of its existing facility and curriculum standards at its schools, new development’s impact must not materially or adversely affect the continuance of these standards. Therefore, new development cannot require that the District house students in these integral support spaces.

Classroom Loading Standards

The following maximum classroom loading-factors are used to determine teaching-station “capacity,” in accordance with the State legislation and the State School Building Program. These capacity calculations are also used in preparing and filing the baseline school capacity statement with the Office of Public School Construction.

Table 6

State Classroom Loading Standards

Kindergarten	25 Students/Classroom
1 st -3 rd Grades	25 Students/Classroom
4 th -6 th Grades	25 Students/Classroom
7 th -8 th Grades	27 Students/Classroom

Existing Facility Capacity

The State determines the baseline capacity by either loading all permanent teaching stations plus a maximum number of portables equal to 25% of the number of permanent classrooms or by loading all permanent classrooms and only portables that are owned or have been leased for over 5 years. As allowed by law and required by the State, facility capacities are calculated by identifying the number of teaching stations at each campus. All qualified teaching stations were included in the calculation of the capacities. To account for activity and changes since the baseline was established, the student grants for new construction projects funded by OPSC have been added. Using these guidelines the District's current State calculated capacity is shown in Table 7.

Table 7

**STRATHMORE UNION ELEMENTARY
 Summary of Existing Facility Capacity**

<u>School Facility</u>	<u>Permanent Classrooms</u>	<u>Portable Classrooms</u>	<u>Chargable Portables</u>	<u>Total Chargable Classrooms</u>	<u>State Loading Factor</u>	<u>State Funded Projects</u>	<u>Total State Capacity</u>
Grades K-6	20	11	3	23	25	290	865
Grades 7-8	0	8	2	2	27	198	252
Special Ed	0	0	0	0	13	0	0
Totals	20	19	5	25		488	1117

As Table 7 shows, the total State capacity of the District facilities is 1,117 students.

Unhoused Students by State Housing Standards

This next chart compares the capacity with the space needed to determine if there is available space for new students from the projected developments. The space needed is determined based on the maximum seats needed to house the students within the existing homes. The historic and projected enrollments were reviewed to determine the space needed for each grade grouping.

Table 8

**STRATHMORE UNION ELEMENTARY
Summary of Available District Capacity**

<u>School Facility</u>	<u>State Capacity</u>	<u>Space Needed</u>	<u>Available Capacity</u>
Grades K-6	865	666	199
Grades 7-8	252	222	30
Special Ed	0	0	0
Totals	1117	888	229

The District capacity of 1,117 is more than the space needed of 888. The difference is 229 students.

V. Calculation of Development's Fiscal Impact on Schools

This section of the study will demonstrate that a reasonable relationship exists between residential, commercial/industrial development and the need for additional school facilities in the Strathmore Union Elementary School District. To the extent this relationship exists, the District is justified in levying developer fees as authorized by Education Code Section 17620.

School Facility Construction Costs

For the purposes of estimating the cost of building schools we have used the State School Building Program funding allowances. These amounts are shown in Table 9. In addition to the basic construction costs, there are site acquisition costs of \$59,312 per acre and approximately \$228,180 per acre for allowable service-site, utilities, off-site and general site development costs.

Table 9

New Construction Costs

<u>Grade Level</u>	<u>Construction Cost Per Student</u>
Elementary	\$19,250
Middle	\$20,408
Average	\$13,505

Reconstruction/Modernization Costs

In addition to any new facilities needed, there is also a need to maintain the existing facilities which the new students will utilize. The following chart shows the total eligibility for modernization/reconstruction in the State Building program. These projects require a minimum local funding contribution in the amount of 40% of the budget. The State will contribute 60% of the eligible amount. Buildings are eligible for State funding for modernization/reconstruction once they reach an age of 25 years old for permanent buildings and 20 years old for portables.



Table 10

Modernization Project Needs

<u>School</u>	<u>Eligible Modernization Grants</u>				<u>State Funding</u>	<u>District Share</u>	<u>Project Total</u>
	<u>Elem</u>	<u>Middle</u>	<u>High</u>	<u>Spec Ed</u>			
Strathmore Elementary	153	161	0	0	\$1,235,080	\$823,387	\$2,058,467

Impact of Residential Development

This next table compares the development-related enrollment projection to the available district capacity for each grade level and then multiplies the unhoused students by the new school construction costs to determine the total school facility costs related to the impact of new residential housing developments.

In addition, the State provides that each District shall be reimbursed for site acquisition costs, including appraisals, surveys and title reports.

Table 11

**STRATHMORE UNION ELEMENTARY
 Summary of Residential Impact**

<u>School Facility</u>	<u>Development Projection</u>	<u>Available Space</u>	<u>Net Unhoused</u>	<u>Construction Cost Per Student</u>	<u>Total Facility Costs</u>
Elementary	20	199	0	\$19,250	\$0
Middle	5	30	0	\$20,408	\$0
Site Purchase: 0.0 acres					\$0
Site Development:					\$0
New Construction Needs:					\$0
Modernization Needs:					\$823,387
TOTAL NEEDS:					\$823,387
Average cost per student:					\$32,935

The total need for school facilities based on the impact of the 50 new housing units projected over the next five years totals \$823,387. To determine the impact per square foot of residential development, this amount is divided by the total square feet of the projected developments. As calculated from the historic Developer Fee Permits, the average size home built has averaged 1,665 square feet. The total area for 50 new homes would therefore be 83,250 square feet. The total residential fee needed to be able to collect \$823,387 would be **\$9.89** per square foot. Since the State Maximum Fee is currently \$3.20 for residential construction, the District is justified in collecting the maximum fee.

Impact of Commercial/Industrial Development

There is a correlation between the growth of commercial/industrial firms/facilities within a community and the generation of school students within most business service areas. Fees for commercial/industrial can only be imposed if the residential fees will not fully mitigate the cost of providing school facilities to students from new development.

The approach utilized in this section is to apply statutory standards, U.S. Census employment statistics, and local statistics to determine the impact of future commercial/industrial development projects on the District. Many of the factors used in this analysis were taken from the U.S. Census, which remains the most complete and authoritative source of information on the community in addition to the “1990 SanDAG Traffic Generators Report”.

Employees per Square Foot of Commercial Development

Results from a survey published by the San Diego Association of Governments “1990 San DAG Traffic Generators” are used to establish numbers of employees per square foot of building area to be anticipated in new commercial or industrial development projects. The average number of workers per 1,000 square feet of area ranges from 0.06 for Rental Self Storage to 4.79 for Standard Commercial Offices. The generation factors from that report are shown in the following table.

Table 12

Commercial/Industrial Category	Average Square Foot Per Employee	Employees Per Average Square Foot
Banks	354	0.00283
Community Shopping Centers	652	0.00153
Neighborhood Shopping Centers	369	0.00271
Industrial Business Parks	284	0.00352
Industrial Parks	742	0.00135
Rental Self Storage	15541	0.00006
Scientific Research & Development	329	0.00304
Lodging	882	0.00113
Standard Commercial Office	209	0.00479
Large High Rise Commercial Office	232	0.00431
Corporate Offices	372	0.00269
Medical Offices	234	0.00427

Source: 1990 SanDAG Traffic Generators report

Students per Employee

The number of students per employee is determined by using the 2000 U.S. Census data for the City of Strathmore. According to the census, there were 2,376 employees in the City and a total of 1,700 in the district. There were 797 school age children in the District. This is a ratio of 0.4689 students per employee. This ratio, however, must be reduced by including only the percentage of employees that worked in their community of residence (29.5%), because only those employees living in the District will impact the District's school facilities with their children. The actual ratio of students per employee in the district is 0.1383.

School Facilities Cost per Student

State costs for housing commercially generated students are the same as those used for residential construction. The cost factors used to assess the impact from commercial development projects are contained in Table 11.

Residential Offset

When additional employees are generated in the District as a result of new commercial/industrial development, fees will also be charged on the residential units necessary to provide housing for the employees living in the District. To prevent a

commercial or industrial development from paying for the portion of the impact that will be covered by the residential fee, this amount has been calculated and deducted from each category. The residential offset amount is calculated by multiplying the following factors together and dividing by 1,000 (to convert from cost per 1,000 square feet to cost per square foot).

- Employees per 1,000 square feet (varies from a low of 0.06 for rental self storage to a high of 4.79 for office building).
- Percentage of employees that worked in their community of residence (29.5 percent). This was derived from 2000 Census data for the District.
- Housing units per employee (0.9583). This was derived from 2010 census data for the District, which indicates there were 1,629 housing units and 1,700 employees.
- Average square feet per dwelling unit (1,665).
- Residential fee charged by the District (\$3.20 per square foot).

The following table shows the calculation of the school facility costs generated by a square foot of new commercial/industrial development for each category of development.

Table 13

STRATHMORE UNION ELEMENTARY							
Summary of Commercial and Industrial Uses							
<u>Type</u>	<u>Employees per 1,000 Sq. Ft.</u>	<u>Students per Employee</u>	<u>Students per 1,000 Sq. Ft.</u>	<u>Average Cost per Student</u>	<u>Cost per Sq. Ft.</u>	<u>Residential offset per Sq. Ft.</u>	<u>Net Cost per Sq. Ft.</u>
Banks	2.83	0.1383	0.391	\$32,935	\$12.89	\$4.26	\$8.63
Community Shopping Centers	1.53	0.1383	0.212	\$32,935	\$6.97	\$2.30	\$4.67
Neighborhood Shopping Centers	2.71	0.1383	0.375	\$32,935	\$12.35	\$4.08	\$8.26
Industrial Business Parks	3.52	0.1383	0.487	\$32,935	\$16.04	\$5.30	\$10.73
Industrial Parks	1.35	0.1383	0.187	\$32,935	\$6.15	\$2.03	\$4.12
Rental Self Storage	0.06	0.1383	0.008	\$32,935	\$0.27	\$0.09	\$0.18
Scientific Research & Development	3.04	0.1383	0.420	\$32,935	\$13.85	\$4.58	\$9.27
Lodging	1.13	0.1383	0.156	\$32,935	\$5.15	\$1.70	\$3.45
Standard Commercial Office	4.79	0.1383	0.663	\$32,935	\$21.82	\$7.22	\$14.61
Large High Rise Commercial Office	4.31	0.1383	0.596	\$32,935	\$19.63	\$6.49	\$13.14
Corporate Offices	2.69	0.1383	0.372	\$32,935	\$12.25	\$4.05	\$8.20
Medical Offices	4.27	0.1383	0.591	\$32,935	\$19.45	\$6.43	\$13.02

*Based on 1990 SanDAG Traffic Generator Report

Net Cost per Square Foot

Since the State Maximum Fee is now \$0.51 for commercial/industrial construction, the District is justified in collecting the maximum fee for all categories with the exception of Rental Self Storage. The District will only be allowed to collect \$0.18 per square foot of Rental Self Storage construction.

Verifying the Sufficiency of the Development Impact

Education Code Section 17620 requires districts to find that fee revenues will not exceed the cost of providing school facilities to the students generated by the development paying the fees. This section shows that the fee revenues do not exceed the impact of the new development.

The total need for school facilities totals \$823,387. The amount the District would collect over the five year period at the maximum rate of \$3.20 for residential and \$0.51 for commercial/industrial development would be as follows:

$\$3.20 \times 50 \text{ homes} \times 1,665 \text{ sq ft per home} = \$266,400$ for Residential

$\$0.51 \times 7,500 \text{ sq ft per year} \times 5 \text{ years} = \$19,125$ for Commercial/Industrial

Total projected 5 year income: \$285,525

The District's 69.23% share = \$197,671

The estimated income is less than the projected needs.

VI. Conclusion

Based on the data contained in this study, it is found that a reasonable relationship exists between residential, commercial/industrial development and the need for additional/modernized school facilities in the Strathmore Union Elementary School District. The following three nexus tests required to show justification for levying fees have been met:

Burden Nexus: New residential development will generate an average of 0.5 K-8 grade students per unit. Because the District has exceeded its capacity, all students generated by new development will require additional school facilities.

Cost Nexus: The cost to provide new and reconstructed facilities is an average of \$9.89 per square foot of residential development. Each square foot of residential development will generate \$3.20 in developer fees resulting in a shortfall of \$6.69 per square foot.

Benefit Nexus: The developer fees to be collected by the Strathmore Union Elementary School District will be used for the provision of additional and reconstructed school facilities. This will benefit the students to be generated by new development by providing them with adequate educational facilities.

The reasonable relationship identified by these findings provides the required justification for the Strathmore Union Elementary School District to levy its 69.23% share of the maximum fees of \$3.20 per square foot for residential construction and \$0.51 per square foot for commercial/industrial construction, except for rental self storage facilities in which a fee of \$0.18 per square foot is justified as authorized by Education Code Section 17620.



Strathmore Union Elementary School District 2012 Developer Fee Justification Study

- ✓ SAB 50-01 - Enrollment certification/Projection
- ✓ Census Data
- ✓ Use of Developer Fees
- ✓ Site Development Costs
- ✓ Index Adjustment on the Assessment for Development – State Allocation Board Meeting of January 25, 2012
- ✓ Annual Adjustment to School Facility Program Grants
- ✓ Modernization Eligibility

January 2012

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STATE OF CALIFORNIA
ENROLLMENT CERTIFICATION/PROJECTION

SAB 50-01 (REV 05/09)

STATE ALLOCATION BOARD
 OFFICE OF PUBLIC SCHOOL CONSTRUCTION

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

Special Day Class pupils only - Enrollment/Residency

	Elementary	Secondary	TOTAL
Non-Severe			
Severe			
TOTAL			

Part A. K-12 Pupil Data

Grade	7th Prev.	6th Prev.	5th Prev.	4th Prev.	3rd Prev.	2nd Prev.	Previous	Current
K	/	/	/	/	/	/	/	/
1								
2								
3								
4								
5								
6								
7								
8								
9								
10								
11								
12								
TOTAL								

Part B. Pupils Attending Schools Chartered By Another District

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

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

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

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

	Elementary	Secondary	TOTAL
Non-Severe			
Severe			
TOTAL			

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
/	/	/	/	/	/	/	/

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) _____

SIGNATURE OF DISTRICT REPRESENTATIVE _____

DATE _____ TELEPHONE NUMBER _____

E-MAIL ADDRESS _____



QT-H1

General Housing Characteristics: 2010

2010 Census Summary File 1

NOTE: For information on confidentiality protection, nonsampling error, and definitions, see <http://www.census.gov/prod/cen2010/doc/sf1.pdf>.

Geography: Strathmore CCD, Tulare County, California

Subject	Number	Percent
OCCUPANCY STATUS		
Total housing units	2,277	100.0
Occupied housing units	2,109	92.6
Vacant housing units	168	7.4
TENURE		
Occupied housing units	2,109	100.0
Owner occupied	1,272	60.3
Owned with a mortgage or loan	861	40.8
Owned free and clear	411	19.5
Renter occupied	837	39.7
VACANCY STATUS		
Vacant housing units	168	100.0
For rent	48	28.6
Rented, not occupied	2	1.2
For sale only	27	16.1
Sold, not occupied	7	4.2
For seasonal, recreational, or occasional use	7	4.2
For migratory workers	2	1.2
Other vacant	75	44.6
TENURE BY HISPANIC OR LATINO ORIGIN OF HOUSEHOLDER BY RACE OF HOUSEHOLDER		
Occupied housing units	2,109	100.0
Owner-occupied housing units	1,272	60.3
Not Hispanic or Latino householder	681	32.3
White alone householder	635	30.1
Black or African American alone householder	4	0.2
American Indian and Alaska Native alone householder	7	0.3
Asian alone householder	19	0.9
Native Hawaiian and Other Pacific Islander alone householder	0	0.0
Some Other Race alone householder	2	0.1
Two or More Races householder	14	0.7
Hispanic or Latino householder	591	28.0
White alone householder	260	12.3
Black or African American alone householder	1	0.0
American Indian and Alaska Native alone householder	3	0.1
Asian alone householder	3	0.1
Native Hawaiian and Other Pacific Islander alone householder	0	0.0
Some Other Race alone householder	299	14.2
Two or More Races householder	25	1.2
Renter-occupied housing units	837	39.7
Not Hispanic or Latino householder	315	14.9
White alone householder	292	13.8
Black or African American alone householder	3	0.1

Subject	Number	Percent
American Indian and Alaska Native alone householder	7	0.3
Asian alone householder	4	0.2
Native Hawaiian and Other Pacific Islander alone householder	1	0.0
Some Other Race alone householder	2	0.1
Two or More Races householder	6	0.3
Hispanic or Latino householder	522	24.8
White alone householder	216	10.2
Black or African American alone householder	3	0.1
American Indian and Alaska Native alone householder	8	0.4
Asian alone householder	1	0.0
Native Hawaiian and Other Pacific Islander alone householder	0	0.0
Some Other Race alone householder	272	12.9
Two or More Races householder	22	1.0

X Not applicable.

Source: U.S. Census Bureau, 2010 Census.

Summary File 1, Tables H3, H4, H5, and HCT1.

ARIZON
NEW MEXICO

OKLAHOMA

ARKANSAS

TENNESSEE

NORTH CAROLINA

SOUTH CAROLINA

QT-P23

Journey to Work: 2000

Census 2000 Summary File 3 (SF 3) - Sample Data

NOTE: Data based on a sample except in P3, P4, H3, and H4. For information on confidentiality protection, sampling error, nonsampling error, definitions, and count corrections see <http://factfinder.census.gov/home/en/datanotes/expsf3.htm>.

Subject	Strathmore CCD, Tulare County, California	
	Number	Percent
MEANS OF TRANSPORTATION AND CARPOOLING		
Workers 16 and over	2,376	100.0
Car, truck, or van	2,201	92.6
Drove alone	1,725	72.6
Carpooled	476	20.0
In 2-person carpool	255	10.7
In 3-person carpool	114	4.8
In 4-person carpool	79	3.3
In 5- or 6-person carpool	26	1.1
In 7-or-more-person carpool	2	0.1
Workers per car, truck, or van	1.15	(X)
Public transportation	8	0.3
Bus or trolley bus	8	0.3
Streetcar or trolley car (público in Puerto Rico)	0	0.0
Subway or elevated	0	0.0
Railroad	0	0.0
Ferryboat	0	0.0
Taxicab	0	0.0
Motorcycle	8	0.3
Bicycle	2	0.1
Walked	59	2.5
Other means	14	0.6
Worked at home	84	3.5
TRAVEL TIME TO WORK		
Workers who did not work at home	2,292	100.0
Less than 10 minutes	343	15.0
10 to 14 minutes	332	14.5
15 to 19 minutes	532	23.2
20 to 24 minutes	324	14.1
25 to 29 minutes	81	3.5
30 to 34 minutes	276	12.0
35 to 44 minutes	80	3.5
45 to 59 minutes	151	6.6
60 to 89 minutes	51	2.2
90 or more minutes	122	5.3
Mean travel time to work (minutes)	25.6	(X)
TIME LEAVING HOME TO GO TO WORK		
Workers who did not work at home	2,292	100.0
5:00 to 5:59 a.m.	330	14.4
6:00 to 6:29 a.m.	238	10.4
6:30 to 6:59 a.m.	324	14.1
7:00 to 7:29 a.m.	317	13.8
7:30 to 7:59 a.m.	318	13.9
8:00 to 8:29 a.m.	188	8.2

Subject	Strathmore CCD, Tulare County, California	
	Number	Percent
8:30 to 8:59 a.m.	56	2.4
9:00 to 11:59 a.m.	120	5.2
12:00 to 3:59 p.m.	165	7.2
All other times	236	10.3

(X) Not applicable.

Source: U.S. Census Bureau, Census 2000 Summary File 3, Matrices P30, P31, P33, P34, and P35.

Use of Developer Fees:

A School District can use the revenue collected on residential and commercial/industrial construction for the purposes listed below:

- Purchase or lease of interim school facilities to house students generated by new development pending the construction of permanent facilities.
- Purchase or lease of land for school facilities for such students.
- Acquisition of school facilities for such students, including:
 - Construction
 - Modernization/reconstruction
 - Architectural and engineering costs
 - Permits and plan checking
 - Testing and inspection
 - Furniture, Equipment and Technology for use in school facilities
- Legal and other administrative costs related to the provision of such new facilities
- Administration of the collection of, and justification for, such fees, and
- Any other purpose arising from the process of providing facilities for students generated by new development.

Following is an excerpt from the Education code that state that valid uses of the Level 1 developer fees. It refers to construction and reconstruction. The term reconstruction was originally used in the Leroy Greene program. The term modernization is currently used in the 1998 State Building Program and represents the same scope of work used in the original reconstruction projects.

Ed Code Section 17620. (a) (1) The governing board of any school district is authorized to levy a fee, charge, dedication, or other requirement against any construction within the boundaries of the district, for the purpose of funding the construction or reconstruction of school facilities, subject to any limitations set forth in Chapter 4.9 (commencing with Section 65995) of Division 1 of Title 7 of the Government Code. This fee, charge, dedication, or other requirement may be applied to construction only as follows: ...

The limitations referred to in this text describe that maximum amounts than can be charged for residential and commercial/industrial projects and any projects that qualify for exemptions. They do not limit the use of the funds received.



Determination of Average State allowed amounts for Site Development Costs

Elementary Schools

<u>District</u>	<u>Project #</u>	<u>Acres</u>	Original		2009 Adjusted		2009 <u>Cost/Acre</u>	
			<u>OPSC Site Development</u>	<u>Inflation Factor</u>	<u>Site Development</u>	<u>Project Year</u>		
Davis Jt Unified	3	9.05	\$532,282	38.4%	\$1,473,469	2004	\$162,814	
Dry Creek Jt Elem	2	8.5	\$516,347	46.2%	\$1,509,322	2002	\$177,567	
Dry Creek Jt Elem	5	11.06	\$993,868	20.1%	\$2,387,568	2006	\$215,874	
Elk Grove Unified	5	12.17	\$556,011	48.2%	\$1,648,316	2001	\$135,441	
Elk Grove Unified	10	11	\$690,120	48.2%	\$2,045,888	2001	\$185,990	
Elk Grove Unified	11	10	\$702,127	48.2%	\$2,081,483	2001	\$208,148	
Elk Grove Unified	14	10	\$732,837	46.2%	\$2,142,139	2002	\$214,214	
Elk Grove Unified	16	9.86	\$570,198	46.2%	\$1,666,733	2002	\$169,040	
Elk Grove Unified	17	10	\$542,662	46.2%	\$1,586,243	2002	\$158,624	
Elk Grove Unified	20	10	\$710,730	43.2%	\$2,034,830	2003	\$203,483	
Elk Grove Unified	25	10	\$645,923	38.4%	\$1,788,052	2004	\$178,805	
Elk Grove Unified	28	10.03	\$856,468	24.4%	\$2,130,974	2005	\$212,460	
Elk Grove Unified	39	9.91	\$1,007,695	20.1%	\$2,420,785	2006	\$244,277	
Folsom-Cordova Unified	1	9.79	\$816,196	20.1%	\$1,960,747	2006	\$200,281	
Folsom-Cordova Unified	4	7.5	\$455,908	46.2%	\$1,332,654	2002	\$177,687	
Folsom-Cordova Unified	5	8	\$544,213	46.2%	\$1,590,776	2002	\$198,847	
Folsom-Cordova Unified	8	8.97	\$928,197	11.2%	\$2,063,757	2007	\$230,073	
Galt Jt Union Elem	2	10.1	\$1,033,044	38.4%	\$2,859,685	2004	\$283,137	
Lincoln Unified	1	9.39	\$433,498	46.2%	\$1,267,148	2002	\$134,947	
Lodi Unified	3	11.2	\$555,999	46.2%	\$1,625,228	2002	\$145,110	
Lodi Unified	10	11.42	\$1,245,492	46.2%	\$3,640,669	2002	\$318,798	
Lodi Unified	19	9.93	\$999,164	11.2%	\$2,221,545	2007	\$223,721	
Lodi Unified	22	10	\$1,416,212	7.7%	\$3,051,426	2008	\$305,143	
Natomas Unified	6	8.53	\$685,284	46.2%	\$2,003,138	2002	\$234,834	
Natomas Unified	10	9.83	\$618,251	43.2%	\$1,770,061	2003	\$180,067	
Natomas Unified	12	9.61	\$735,211	24.4%	\$1,829,275	2005	\$190,351	
Rocklin Unified	8	10.91	\$593,056	46.2%	\$1,733,548	2002	\$158,895	
Stockton Unified	1	12.66	\$1,462,232	7.7%	\$3,150,582	2008	\$248,861	
Stockton Unified	2	10.5	\$781,675	43.2%	\$2,237,946	2003	\$213,138	
Stockton Unified	6	12.48	\$1,136,704	20.1%	\$2,730,703	2006	\$218,806	
Tracy Jt Unified	4	10	\$618,254	46.2%	\$1,807,204	2002	\$180,720	
Tracy Jt Unified	10	10	\$573,006	38.4%	\$1,586,202	2004	\$158,620	
Washington Unified	1	8	\$446,161	46.2%	\$1,304,163	2002	\$163,020	
Washington Unified	4	10.76	\$979,085	7.7%	\$2,109,575	2008	\$196,057	
Totals		341.16			\$68,791,833	Average	\$201,641	2012 Adjustment \$203,472

Middle and High Schools

<u>District</u>	<u>Project #</u>	<u>Acres</u>	Original		2009 Adjusted		2009 <u>Cost/Acre</u>	
			<u>OPSC Site Development</u>	<u>Inflation Factor</u>	<u>Site Development</u>	<u>Project Year</u>		
Western Placer Unified	4	19.3	\$5,973,312	24.4%	\$7,431,085	2005	\$385,030	
Roseville City Elem	2	21.6	\$1,780,588	48.2%	\$2,639,311	2000	\$122,190	
Elk Grove Unified	4	66.2	\$8,659,494	48.2%	\$12,835,704	2000	\$193,893	
Elk Grove Unified	13	76.4	\$9,791,732	48.2%	\$14,513,986	2001	\$189,974	
Elk Grove Unified	18	84.3	\$13,274,562	43.2%	\$19,002,626	2003	\$225,417	
Grant Jt Union High	2	24	\$2,183,840	48.2%	\$3,237,039	2000	\$134,877	
Center Unified	1	21.2	\$1,944,310	46.2%	\$2,841,684	2002	\$134,042	
Lodi Unified	2	13.4	\$1,076,844	46.2%	\$1,573,849	2002	\$117,451	
Lodi Unified	6	13.4	\$2,002,164	46.2%	\$2,926,240	2002	\$218,376	
Galt Jt Union Elem	1	24.9	\$2,711,360	46.2%	\$3,962,757	2002	\$159,147	
Tahoe Truckee Unified	2	24	\$2,752,632	43.2%	\$3,940,412	2003	\$164,184	
Davis Unified	5	23.3	\$3,814,302	43.2%	\$5,460,199	2003	\$234,343	
Woodland Unified	3	50.2	\$8,664,700	46.2%	\$12,663,792	2002	\$252,267	
Sacramento City Unified	1	35.2	\$4,813,386	46.2%	\$7,034,949	2002	\$199,856	
Lodi Unified	4	47	\$7,652,176	46.2%	\$11,183,950	2002	\$237,956	
Stockton Unified	3	49.1	\$8,959,088	43.2%	\$12,824,996	2003	\$261,202	
Natomas Unified	11	38.7	\$3,017,002	38.4%	\$4,175,850	2004	\$107,903	
Rocklin Unified	11	47.1	\$11,101,088	24.4%	\$13,810,282	2005	\$293,212	
Totals		679.3			\$142,058,711	Average	\$209,125	2012 Adjustment \$191,427
Middle Schools:		260.7			\$49,447,897	Middle	\$189,704	\$191,427
High Schools:		418.6			\$92,610,814	High	\$221,217	\$223,226

REPORT OF THE EXECUTIVE OFFICER
State Allocation Board Meeting, January 25, 2012

INDEX ADJUSTMENT ON THE ASSESSMENT FOR DEVELOPMENT

PURPOSE OF REPORT

To report the index adjustment on the assessment for development which may be levied pursuant to Education Code Section 17620.

DESCRIPTION

The law requires the maximum assessment for development be adjusted every two years by the change in the Class B construction cost index, as determined by the State Allocation Board (Board) at its January meeting. This item requests that the Board make the adjustment it considers appropriate.

AUTHORITY

Education Code Section 17620(a)(1) states the following: "The governing board of any school district is authorized to levy a fee, charge, dedication, or other requirement against any construction within the boundaries of the district, for the purpose of funding the construction or reconstruction of school facilities, subject to any limitations set forth in Chapter 4.9 (commencing with Section 65995) of Division 1 of Title 7 of the Government Code."

Government Code Section 65995(b)(3) states the following: "The amount of the limits set forth in paragraphs (1) and (2) shall be increased in 2000, and every two years thereafter, according to the adjustment for inflation set forth in the statewide cost index for class B construction, as determined by the State Allocation Board at its January meeting, which increase shall be effective as of the date of that meeting."

BACKGROUND

There are three levels that may be levied for developer's fees. The fees are levied on a per-square foot basis. The lowest fee, Level I, is assessed if the district conducts a Justification Study that establishes the connection between the development coming into the district and the assessment of fees to pay for the cost of the facilities needed to house future students. The Level II fee is assessed if a district makes a timely application to the Board for new construction funding, conducts a School Facility Needs Analysis pursuant to Government Code Section 65995.6, and satisfies at least two of the requirements listed in Government Code Section 65995.5(b)(3). The Level III fee is assessed when State bond funds are exhausted; the district may impose a developer's fee up to 100 percent of the School Facility Program new construction project cost.

In 2010, the Board did not adjust the fee since it decreased, which kept it at the 2008 rate of \$2.97 per square foot for Residential and \$.47 per square foot for Commercial/Industrial.

STAFF ANALYSIS/STATEMENTS

The assessment for development fees for 2006, 2008, 2010, and 2012 are shown below for information. According to the Marshall & Swift (M&S) Eight California Cities Index and Ten Western States Index and the Lee Saylor Index, the cost index for Class B construction adjusted by 8.21, 6.70 and 5.49 percent respectively during the period of January 2010 through January 2012, requiring the assessment for development fees to be adjusted as follows:

Eight California Cities Index Maximum Level I Assessment Per Square Foot

	<u>2006</u>	<u>2008</u>	<u>2010</u>	<u>2012</u>
Residential	\$2.63	\$2.97	\$2.96	3.20
Commercial/Industrial	.42	.47	.47	.51

Ten Western States Index Maximum Level I Assessment Per Square Foot

	<u>2006</u>	<u>2008</u>	<u>2010</u>	<u>2012</u>
Residential	\$2.63	\$2.97	\$3.00	3.20
Commercial/Industrial	.42	.47	.47	.50

Lee Saylor Index Maximum Level I Assessment Per Square Foot

	<u>2006</u>	<u>2008</u>	<u>2010</u>	<u>2012</u>
Residential	\$2.62	\$2.86	\$2.98	3.14
Commercial/Industrial	.42	.46	.48	.51

The M&S Eight California Cities Index fits most appropriately for the construction projects in California. Additionally, it will provide more assessment collection to school districts than the alternate indices.

RECOMMENDATION

Adjust the 2012 maximum Level I assessment for development using the M&S Eight California Cities Index to be effective immediately.

ATTACHMENT A

ANNUAL ADJUSTMENT TO SCHOOL FACILITY PROGRAM GRANTS
 State Allocation Board Meeting, January 25, 2012

Grant Amount Adjustments

		Regulation Section	Current Adjusted Grant Per Pupil Effective 1-1-11	Current Grant Per Pupil Effective 1-1-12
New Construction	Elementary	1859.71	\$9,112	\$9,455
	Middle	1859.71	\$9,637	\$9,999
	High	1859.71	\$12,260	\$12,721
	Special Day Class – Severe	1859.71.1	\$25,601	\$26,564
	Special Day Class – Non-Severe	1859.71.1	\$17,121	\$17,765
	Automatic Fire Detection/Alarm System – Elementary	1859.71.2	\$11	\$11
	Automatic Fire Detection/Alarm System – Middle	1859.71.2	\$15	\$16
	Automatic Fire Detection/Alarm System – High	1859.71.2	\$24	\$25
	Automatic Fire Detection/Alarm System – Special Day Class – Severe	1859.71.2	\$47	\$49
	Automatic Fire Detection/Alarm System – Special Day Class – Non-Severe	1859.71.2	\$32	\$33
	Automatic Sprinkler System – Elementary	1859.71.2	\$153	\$159
	Automatic Sprinkler System – Middle	1859.71.2	\$182	\$189
	Automatic Sprinkler System – High	1859.71.2	\$189	\$196
	Automatic Sprinkler System – Special Day Class – Severe	1859.71.2	\$484	\$502
	Automatic Sprinkler System – Special Day Class – Non-Severe	1859.71.2	\$324	\$336
Modernization	Elementary	1859.78	\$3,470	\$3,600
	Middle	1859.78	\$3,671	\$3,809
	High	1859.78	\$4,804	\$4,985
	Special Day Class - Severe	1859.78.3	\$11,054	\$11,470
	Special Day Class – Non-Severe	1859.78.3	\$7,396	\$7,674
	State Special School – Severe	1859.78	\$18,429	\$19,122
	Automatic Fire Detection/Alarm System – Elementary	1859.78.4	\$111	\$115
	Automatic Fire Detection/Alarm System – Middle	1859.78.4	\$111	\$115
	Automatic Fire Detection/Alarm System – High	1859.78.4	\$111	\$115
	Automatic Fire Detection/Alarm System – Special Day Class – Severe	1859.78.4	\$310	\$322
	Automatic Fire Detection/Alarm System – Special Day Class – Non-Severe	1859.78.4	\$208	\$216
	Over 50 Years Old – Elementary	1859.78.6	\$4,819	\$5,000
	Over 50 Years Old – Middle	1859.78.6	\$5,098	\$5,290
	Over 50 Years Old – High	1859.78.6	\$6,674	\$6,925
	Over 50 Years Old – Special Day Class – Severe	1859.78.6	\$15,360	\$15,938
	Over 50 Years Old – Special Day Class – Non-Severe	1859.78.6	\$10,272	\$10,658
	Over 50 Years Old – State Special School – Severe	1859.78.6	\$25,601	\$26,564

ANNUAL ADJUSTMENT TO SCHOOL FACILITY PROGRAM GRANTS

Grant Amount Adjustments

New Construction / Modernization / Joint-Use	Regulation Section	Current Adjusted Grant Per Pupil Effective 1-1-11	Current Grant Per Pupil Effective 1-1-12
Therapy/Multipurpose Room/Other (per square foot)	1859.72 1859.73.2 1859.82 1859.125 1859.125.1	\$148	\$154
Toilet Facilities (per square foot)	1859.72 1859.73.2 1859.82 1859.125 1859.125.1	\$268	\$278
New Construction Only			
Parking Spaces	1859.76	\$11,586	\$12,022
General Site Grant (per acre for additional acreage being acquired)	1859.76	\$14,808	\$15,365
Project Assistance (for school district with less than 2,500 pupils)	1859.73.1	\$5,498	\$5,705
Modernization Only			
Two-stop Elevator	1859.83	\$92,675	\$96,160
Additional Stop	1859.83	\$16,680	\$17,307
Project Assistance (for school district with less than 2,500 pupils)	1859.78.2	\$2,930	\$3,040
Facility Hardship / Rehabilitation			
Current Replacement Cost - Other (per square foot)	1859.2	\$296	\$307
Current Replacement Cost - Toilets (per square foot)	1859.2	\$535	\$555
Interim Housing – Financial Hardship (per classroom)	1859.81	\$30,539	\$31,687
Charter School Facilities Program - Preliminary Apportionment Amounts			
Charter School Elementary	1859.163.1	\$8,638	\$8,963
Charter School Middle	1859.163.1	\$9,145	\$9,489
Charter School High	1859.163.1	\$11,944	\$12,393
Charter School Special Day Class - Severe	1859.163.1	\$27,524	\$28,559
Charter School Special Day Class - Non-Severe	1859.163.1	\$18,406	\$19,098



Public School Construction 

Monday, January 30, 2012

Project Tracking System: School Facility Program: Project Summary

District: Strathmore Union Elementary **Application No:** 57/72157-00-000
School: Strathmore Elementary **County:** Tulare
District Rep: Dr. Shelly Long

SAB 50-03 Modernization Eligibility Information

Modernization Baseline Eligibility

Grade Level:	K - 6	7 - 8	9 - 12	Non-Severe	Severe
District has chosen Option: A	150	0	0	0	0
SAB Approvals/Adjustments:	3	161	0	0	0
Remaining Eligibility:	153	161	0	0	0

SAB 50-03 Eligibility Document Status/Dates

Status: PM Complete
Date Signed: 3/17/2000
Date Received: 3/22/2000
SAB Approval Date: 7/26/2000

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

OPSC Project Manager: Valerie Castro
Telephone: (916) 375-4216
E-mail Address: valerie.castro@dgs.ca.gov

[View New Construction Eligibility](#)

[Project Tracking Home](#)

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