



SCHOOL FACILITIES NEEDS ANALYSIS

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EXECUTIVE SUMMARY

A. INTRODUCTION

With the passage of Senate Bill 50 and Proposition 1A in 1998, upon meeting certain requirements, school districts have the option of adopting alternative school fees (“Alternative Fees”), also known as Level II and Level III fees. These Alternative Fees are beyond the base statutory school fees, Level I Fees, which may be collected from new residential housing to finance new school facility construction.

This School Facilities Needs Analysis (“SFNA”) has been prepared for the Poway Unified School District (“School District”) in accordance with Education Code Section 17620 et seq. and Government Code Section 65995 et seq. and serves as the basis for justifying the collection of Alternative Fees and the level at which they may be levied. More specifically, the SFNA is conducted in order to determine the need for new school facilities for unhoused pupils that are attributable to projected enrollment growth from the development of new residential units over the next five (5) years. The SFNA is required to be adopted by resolution at a public hearing after it has been made available to the public for a period of not less than thirty days. Prior to the public hearing, the public has the opportunity to review and comment on the SFNA. The Alternative Fees, which may be adopted at the public hearing take effect immediately and are valid for a maximum of one (1) year, unless a revised report is adopted.

B. ELIGIBILITY AND STATUTORY REQUIREMENTS

As a prerequisite for collecting the Alternative Fees, a school district must satisfy the following:

- (i) Make a timely application to the State Allocation Board (“SAB”) for new construction funding for which it is eligible and be determined to meet the eligibility requirements for new construction funding set forth in Sections 17071.10 and 17071.75 of the Education Code. If the SAB fails to notify the school district of its eligibility within 120 days of receipt of application, the school district is deemed eligible by default; and
- (ii) Comply with at least two (2) of the four (4) statutory requirements (“Statutory Requirements”) set forth in Section 65995.5(b)(3) as summarized below:
 1. School District has substantial enrollment of its students on a multi-track year-round schedule;
 2. School District has placed on the ballot in the previous four (4) years at least one (1) local general obligation bond to finance school facilities and the measure received at least 50 percent plus one of the votes cast;
 3. School District has issued debt or incurred debt obligations for capital outlay in an amount equivalent to the percentage of the School District’s bonding capacity as further specified in Section 65995.5(b)(3)(C); and/or

4. At least 20 percent of the teaching stations within the School District are portable classrooms.

C. ALTERNATIVE FEES

The Level II Fee is calculated pursuant to Government Code Section 65995.5 *et seq.* and is intended to represent fifty percent (50%) of a school district's facility costs (based on State formulas) and applies when the SAB is apportioning State funding. The Level III Fee is calculated pursuant to Government Code Section 65995.7 *et seq.* and is intended to represent roughly one hundred percent (100%) of a school district's facility costs and applies if the SAB ceases to provide such funding.

The Level II Fee and Level III Fee determined herein are set forth in the table below.

ALTERNATIVE FEE	AMOUNT
Level II Fee	\$3.90 per square foot
Level III Fee	\$7.80 per square foot

SECTION I. ELIGIBILITY TO LEVY ALTERNATIVE FEES

A. TIMELY APPLICATION

Government Code Section 65995.5(b)(1) requires that the governing board of the School District make a timely application to the SAB and meet the eligibility requirements for new construction funding under the School Facilities Program (“SFP”) as set forth in Education Code Section 17071.10 and Section 17071.75.

The School District filed an application requesting an eligibility determination (“Eligibility Determination”) for new construction funding as required by the SAB and to approve and submit the required SAB Forms 50-01, 50-02 and 50-03. The School District was originally deemed eligible on May 26, 1999. A copy of the most current Eligibility Determination is contained within Appendix “A”.

B. STATUTORY REQUIREMENTS

A School District must also satisfy two (2) of the four (4) statutory school threshold tests set forth in Government Code Section 65995.5(b)(3). The School District satisfies two (2) of the Statutory Requirements as shown below:

ELIGIBILITY REQUIREMENTS		SATISFIED
(i)	Substantial enrollment on a Multi-Track Year-Round Schedule	Not Satisfied —The School District does not currently provide Multi-Track Year-Round Schedule programs at any school.
(ii)	At least one (1) local bond measure on the ballot in the last four (4) years and received at least 50 percent plus one (1) of the votes cast	Not Satisfied —The most recent local bond measure obtaining a majority vote, Proposition C, was placed on the ballot in 2008.
(iii)	The School District has issued debt or incurred obligations for capital outlay in an amount equivalent to the percentage (15% or 30%, as applicable) of its bonding capacity set forth in Section 65995.5(b)(3)(C).	Satisfied —The School District has \$1,009,874,781 in outstanding long-term debt for capital outlay, including \$436,331,604 in General Obligation Bonds, \$56,790,000 in Lease Revenue Bonds, and \$516,750,177 in Community Facilities District Bonds. The bonding capacity of the School District is currently \$1,029,540,055 based on Fiscal Year 2017/18 assessed valuations. Therefore, the School District is currently at 98.09% of its bonding capacity. Appendix “C” provides the bonding capacity calculation of the School District.
(iv)	At least 20% of the teaching stations within the School District are portable classrooms	Satisfied —The School District is currently operating in 1,304 permanent classrooms and 374 portable classrooms; thus, portable classrooms comprise 22.29% of the total teaching stations of the School District.

SECTION II. PROJECTED UNHOUSED STUDENTS FROM NEW RESIDENTIAL DEVELOPMENT OVER THE NEXT FIVE YEARS

A. PROJECTED STUDENT ENROLLMENT

1. Student Generation Rates

As required by and in accordance with Government Code Section 65995.6, this SFNA projects the number of unhoused students attributable to projected enrollment growth (“Projected Student Enrollment”) from the development of additional residential units over the next five (5) years (“Projected Units”). The projection of students must be based on the historical student generation rates (“SGR”) of new residential units constructed during the previous five (5) years that are of a similar type of unit as the Projected Units. The types of residential units considered include (i) single family detached (“SFD”), (ii) single family attached (“SFA”), and (iii) multi-family units (“MF”). Units classified as SFD are those units with no common walls; SFA are those units sharing a common wall each on a separate and unique assessor’s parcel (e.g. townhouses, condominiums, etc.); and MF are those units which share a single assessor’s parcel and share a common wall (e.g. apartments, duplexes, etc.).

In order to calculate SGRs, Koppel & Gruber Public Finance (“KGPF”) first obtained property characteristic/GIS data from SANGIS, a Joint Powers Authority of the City and County of San Diego. Parcels in the database were classified by unit type (SFD, SFA, MF) and residential parcels constructed during the past five (5) years (Calendar Years 2013 through 2017) were extracted. Based on the parcel information, a total of 1,583 SFDs, 317 SFAs, and 265 MFs were built within the School District in the previous five (5) years.

KGPF then obtained a student database from the School District, which is reflective of student enrollment information as of October 2017. The student enrollment information was matched to the City property characteristic/GIS data based on address. The number of students matched was then queried by school level and residential category. A total 1,077 of students matched to the 1,583 SFDs, 158 students matched to the 317 SFAs, and 156 students matched to the 265 MFs.

Tables 1, 2 and 3 below summarize the calculation of the SGRs by residential category. Table 4 combines the SGRs for each residential type and lists the result per school level¹.

TABLE 1
SINGLE FAMILY DETACHED (SFD)
STUDENT GENERATION RATES

SCHOOL LEVEL	STUDENTS MATCHED	SFD UNITS	SGR BY SCHOOL LEVEL
Elementary School (K-5)	639	1,583	0.4037
Middle School (6-8)	235	1,583	0.1485
High School (9-12)	203	1,583	0.1282
TOTAL	1,077	NA	0.6804

TABLE 2
SINGLE FAMILY ATTACHED (SFA)
STUDENT GENERATION RATES

SCHOOL LEVEL	STUDENTS MATCHED	SFA UNITS	SGR BY SCHOOL LEVEL
Elementary School (K-5)	86	317	0.2713
Middle School (6-8)	35	317	0.1104
High School (9-12)	37	317	0.1167
TOTAL	158	NA	0.4984

TABLE 3
MULTI-FAMILY (MF)
STUDENT GENERATION RATES

SCHOOL LEVEL	STUDENTS MATCHED	MF UNITS	SGR BY SCHOOL LEVEL
Elementary School (K-5)	85	265	0.3208
Middle School (6-8)	29	265	0.1094
High School (9-12)	42	265	0.1585
TOTAL	156	NA	0.5887

TABLE 4
COMBINED STUDENT GENERATION RATES

SCHOOL LEVEL	SFD UNITS	SFA UNITS	MF UNITS
Elementary School (K-5)	0.4037	0.2713	0.3208
Middle School (6-8)	0.1485	0.1104	0.1094
High School (9-12)	0.1282	0.1167	0.1585
TOTAL	0.6804	0.4984	0.5887

¹ SGRs are a calculation of students per residential unit at a given moment in time and are constantly changing; therefore, consideration should be taken when utilizing SGRs determined herein for long-term planning.

2. Projected Units

In accordance with Government Code Section 65995.6, a projection was made of the residential units planned to be constructed within the School District over the next five (5) years. The School District provided KGPF with a list of residential projects under consideration, which KGPF updated with information retrieved from City of Poway planning documents, as well as permit information made publicly available from the City of San Diego’s Development Services Department. While the School District shares common jurisdiction with the County of San Diego and a small portion of the City of Santee, residential development is currently not planned or expected to occur over the next five (5) years within these areas. Likely construction completion rates were estimated for the next five years by project type. In accordance with the recommendations of Government Code Section 65352.2, a notice of the preparation of the 2018 SFNA (including a summary of the residential projections and findings) was sent to the Development Services Departments of the Cities of San Diego, Santee, and Poway, as well as the County Planning Department (collectively the “Planning Agencies”) in July 2018 for review and comment.

The School District has entered into mitigation agreements with certain property owners and/or developers, whereby the terms of the mitigation agreements require mitigation payments or participation in a Community Facilities District (“CFD”) in lieu of paying Alternative Fees. In total, 16 CFDs have been formed within the School District boundaries. Projected Units within such CFDs have been identified and/or estimated and excluded from the calculation of the Alternative Fees. The estimated total Projected Units that are located within the CFDs (which, for purposes of this SFNA are deemed “mitigated”) and unmitigated Projected Units in the entire School District are summarized by residential category in Table 5. The most current available information was taken into account in these projections, including the deduction of existing units that are expected to be demolished in the next five years.

TABLE 5
TOTAL PROJECTED UNITS

RESIDENTIAL CATEGORY	TOTAL PROJECTED UNITS	UNMITIGATED PROJECTED UNITS	MITIGATED PROJECTED UNITS
SFD	308	28	280
SFA	446	326	120
MF	328	76	252
TOTAL	1,082	430	652

3. Projected Student Enrollment

The number of unmitigated Projected Units listed in Table 5 multiplied by the SGRs shown in Table 4 results in the Projected Student Enrollment. The Projected Student Enrollment is shown in Table 6 by school level.

TABLE 6
PROJECTED STUDENT ENROLLMENT FROM UNMITIGATED UNITS
BY SCHOOL LEVEL

SCHOOL LEVEL	PROJECTED STUDENT ENROLLMENT
Elementary School (K-5)	123
Middle School (6-8)	48
High School (9-12)	54
TOTAL	225

B. CLASSROOM INVENTORY

Government Code Section 65995.6 requires that the School District identify and consider any available capacity in existing facilities that may accommodate projected enrollment growth. The School District currently operates twenty-five (25) elementary school sites, six (6) middle schools, one (1) K-8 school, and six (6) high schools.

Pursuant to Education Code Section 17071.10, these facilities have a capacity to accommodate 37,185 students. This capacity was reported on SAB Form 50-02 and was updated to reflect new school facility construction projects funded by the State. Appendix “C” provides a calculation of the updated facility capacity.

C. PROJECTED UNHOUSED STUDENTS

Based on enrollment information as of October 2017, the total student enrollment of the School District is 36,439 students. A summary of the enrollment data is provided in Appendix “D”. Available facilities capacity is calculated by subtracting the October 2017 student enrollment from existing school facilities capacity for each school level. The School District currently operates elementary schools serving students in grades transitional kindergarten through 5 and middle schools serving students in grades 6 through 8. In order to be consistent with the SAB 50-02 reporting requirements, the enrollment school level configuration has been adjusted to represent grades kindergarten through 6 at the elementary level and grades 7 and 8 at the middle school level. This operation results in available capacity at the elementary school and high school levels, and a deficit capacity at the middle school level. The capacity calculation is shown in Table 7.

**TABLE 7
AVAILABLE CAPACITY EVALUATION**

SCHOOL LEVEL	EXISTING FACILITIES CAPACITY	STUDENT ENROLLMENT (OCTOBER 2017) ¹	AVAILABLE/ (DEFICIT) CAPACITY
Elementary School (K-6)	20,254	19,484	770
Middle School (7-8)	5,302	5,689	(387)
High School (9-12)	11,629	11,266	363
TOTAL	37,185	36,439	746

¹ The School District currently operates K-5 and 6-8 schools; the figures above have been adjusted by school level to be consistent with SAB 50-02 capacity requirements.

As shown in Table 7, available capacity exists at the elementary school and high school levels. A substantial portion of the capacity was funded through debt issued and being repaid through special taxes levied on properties within the CFDs. Seats available at the CFD funded schools therefore must be first reserved for student generated from mitigated Projected Units. A projection of the number of students generated from mitigated Projected Units demonstrates many of the available seats are expected to be occupied by such students. Furthermore, application of a Five-Year Cohort Survival Enrollment Projection, which utilizes historical and school district-wide enrollment trends to project overall school district enrollment over a five-year period, including enrollment changes from existing housing, demonstrates that within the next five (5) years, deficit capacity is expected at all school levels. The Five-Year Cohort Survival Enrollment Projection analysis is provided in Appendix “H”. Since zero (0) seats are deemed available to house Projected Student Enrollment, no adjustments are made to Projected Student Enrollment figures. Table 8 shows the number of Projected Unhoused Students determined for each school level.

**TABLE 8
PROJECTED UNHOUSED STUDENTS**

SCHOOL LEVEL	PROJECTED STUDENT ENROLLMENT	AVAILABLE SEATS ¹	PROJECTED UNHOUSED STUDENTS
Elementary School (K-5)	123	0	123
Middle School (6-8)	48	0	48
High School (9-12)	54	0	54
TOTAL	225	0	225

¹ A deficit capacity equals zero (0) available seats.

Government Code Section 65995.6(b) requires the School District to identify any surplus school sites that could be used to lower the need to house Projected Unhoused Students. While the School District is in possession of the Santaluz/Torrey Highlands Middle School and Torrey Highlands Elementary School sites, school facilities do not exist on these sites. Therefore, there are no additional adjustments to the number of Projected Unhoused Students as determined in Table 8 above. The sites are further evaluated in Appendix “E”.

SECTION III. LEVEL II FEE

The following section sets forth the calculation of the permissible Level II Fee.

A. MAXIMUM NEW CONSTRUCTION GRANT

1. Per-Pupil Grant

The total new construction grant amount is determined by multiplying the number of Projected Unhoused Students by the total pupil grant (“PPG”). The PPG amount is calculated as the sum of the base per pupil grant and the Automatic Fire Detection/Alarm and Fire Sprinkler System Grant (“ADG”). The base per-pupil grant is identified in Education Code Section 17072.10(a) and was adjusted by the SAB on January 24, 2018 per Education Code Section 17072.10(b). Section 1859.71.2 of Title 2 of the California Code of Regulations (“Regulations”) allows for the additional grant for automatic fire alarm detection systems and fire sprinkler systems. The ADG was also adjusted by the SAB as of January 24, 2018. Furthermore, Section 1859.76 of the Regulations provides additional grants for general site development on new school construction projects (the “GSDG”). On January 24, 2018, the SAB adopted amendments extending the GSDG until January 1, 2019. Appendix “F” provides a calculation of the allowable GSDG. Table 9 shows the base per pupil grant, the additional grants as well as the total PPG.

**TABLE 9
TOTAL PER-PUPIL GRANT (2018)**

SCHOOL LEVEL	BASE PER-PUPIL GRANT AMOUNT	ADG	GSDG	TOTAL PPG
Elementary School (K-6)	\$11,567	\$208	\$634	\$12,409
Middle School (7-8)	\$12,234	\$249	\$681	\$13,164
High School (9-12)	\$15,567	\$271	\$660	\$16,498

2. New Construction Grant Amount

In accordance with Government Code Section 65995.5(c)(1), the New Construction Grant amount is calculated by multiplying the number of Projected Unhoused Students shown in Table 8 by the total PPG shown in Table 9.

The calculation to determine the total New Construction Grant amounts by school level is shown in Table 10.

**TABLE 10
NEW CONSTRUCTION GRANT AMOUNT**

SCHOOL LEVEL	PROJECTED UNHOUSED STUDENTS	TOTAL PPG	NEW CONSTRUCTION GRANT
Elementary School (K-5)	123	\$12,409	\$1,526,307
Middle School (6-8)	48	\$13,164	\$631,872
High School (9-12)	54	\$16,498	\$890,892
TOTAL	225	NA	\$3,049,071

B. SITE ACQUISITION AND SITE DEVELOPMENT COSTS

In calculating the permissible Level II Fee, Government Code Section 65995.5 (c)(1) allows for certain site acquisition and site development costs to be added to the New Construction Grant amounts determined in the previous section. However, due to the fact that the School District does not anticipate acquiring new sites to accommodate student enrollment from unmitigated Projected Units in the foreseeable future, costs associated with the site acquisition and development of new school sites and allowable under Government Code Section 65995.5 (c) (1) are not included in Level II fee calculation.

C. MAXIMUM LEVEL II FEE COST AND NET LEVEL II FEE COST

The Maximum Level II Fee Cost is calculated as the sum of the (i) New Construction Grant and the (ii) Total Site Acquisition and Site Development Grant amounts. Since the total site acquisition and site development costs are determined to be zero (0) dollars for the purpose of this analysis, the Maximum Level II Fee Cost only reflects the New Construction Grant shown in Table 10. The Maximum Level II Costs represent the maximum school facility costs that may be included in the calculation of the Level II Fee and are shown in Table 11.

TABLE 11
MAXIMUM LEVEL II FEE COST

DESCRIPTION	AMOUNT
Total New Construction Grant	\$3,049,071
Total Site Acquisition and Development Grant	\$0
MAXIMUM LEVEL II FEE COST	\$3,049,071

Government Code Section 65995.5(c)(2) requires that the School District subtract the full amount of local funds that the governing board has dedicated to facilities necessitated by unmitigated Projected Units from the Maximum Level II Fee Costs to determine the Net Level II Fee Cost. Appendix “E” identifies and considers local revenues sources (“Local Funds”) available to offset the impact of Projected Units. The Net Level II Fee Costs are equal to the Maximum Level II Fee Costs minus the Local Funds. This amount is calculated in Table 12.

TABLE 12
NET LEVEL II FEE COST

DESCRIPTION	AMOUNT
Maximum Level II Fee Cost	\$3,049,071
Credit for Local Funds	\$0
NET LEVEL II FEE COST	\$3,049,071

D. LEVEL II FEE CALCULATION

In accordance with Government Code Section 65995.5(c)(3), the maximum Level II Fee is calculated by dividing the Net Level II Fee Cost by the total square footage of assessable space of the unmitigated Projected Units. To project the total square footage of assessable space of the unmitigated Projected Units, the average square footage of SFD, SFA and MF

unmitigated Projected Units must first be determined. A review of (i) historical parcel information from SANGIS, (ii) planned unit sizes for residential project anticipated to be constructed over the next five (5) years, as available, and (iii) certificates of compliance records maintained by School District were used to estimate the average square footage of unmitigated Projected Units by housing type. For areas of the School District sharing common jurisdiction with unincorporated territories within the County and the City of Santee, no residential development is expected over the next five (5) years. The average square footage estimates were submitted to the Planning Agencies in July 2018 for review and comment. Table 13 shows the projected average square footages as well as the total square footage of assessable space of unmitigated Projected Units within the School District.

**TABLE 13
TOTAL SQUARE FOOTAGE OF UNMITIGATED PROJECTED UNITS**

RESIDENTIAL CATEGORY	UNMITIGATED PROJECTED UNITS	AVERAGE SQUARE FOOTAGE PER UNIT	TOTAL PROJECTED SQUARE FEET
SFD	28	4,327	121,156
SFA	326	1,778	579,628
MF	76	1,070	81,320
TOTAL	430	NA	782,104

The Net Level II Fee Costs are divided by the applicable total projected square feet of the Projected Units to arrive at the Level II. The result of this operation is shown in Table 14. The Level II Fee represents the amount that can be adopted by the Board of Education of the School District. Once adopted, the Level II Fee can be levied on future residential units in accordance with applicable law.

**TABLE 14
LEVEL II FEE**

DESCRIPTION	AMOUNT
Net Level II Fee Cost	\$3,049,071
Total Square Footage of Unmitigated Projected Units	782,104
LEVEL II FEE	\$3.90

SECTION IV. LEVEL III FEE

The following section sets forth the calculation of the permissible Level III Fee. The Level III Fee is determined in accordance with Government Code Section 65995.7 and may be imposed if (i) the School District has complied with Government Code Section 65995.5 and (ii) State funds for new school facility construction are not available. State funds are not available if the SAB is no longer approving apportionments for new construction pursuant to Education Code Section 17072.20 due to lack of funds available for new construction.

A. LEVEL III FEE CALCULATION

The Level III Fee is calculated by increasing the Net Level II Fee Cost by an amount not to exceed the Maximum Level II Fee Cost, except that for the purpose of calculating this additional amount, the Local Funds identified pursuant to Government Section 65995.5(c)(2) and Section 65995.6(b) are not subtracted. This calculation is shown in Table 15 and the result represents the maximum amount of school facility costs that can be included in the calculation of the Level III Fee.

TABLE 15
LEVEL III COST

DESCRIPTION	AMOUNT
Maximum Level II Fee Cost	\$3,049,071
Net Level II Fee Cost	\$3,049,071
LEVEL III FEE COST	\$6,098,142

The Level III Fee Costs are divided by the total projected square feet of the unmitigated Projected Units for each applicable school level as shown in Table 13 to arrive at the Level III Fee. The result of this operation is shown in Table 16.

TABLE 16
LEVEL III FEE

DESCRIPTION	AMOUNT
Level III Fee Cost	\$6,098,142
Total Square Footage of Unmitigated Projected Units	782,104
LEVEL III FEE	\$7.80

B. REIMBURSEMENT PROVISION

Government Code Section 65995.7(b) provides that a governing board may offer a reimbursement election to the person(s) subject to the Level III Fee with the right to monetary reimbursement of the difference, in whole or in part, between the Level II and Level III Fee to the extent that the School District receive funds from the State for construction of the school facilities for which that amount was required (less any amount expended for interim housing). The reimbursement election may be made on a tract or lot basis at the option of the person(s) subject to the Level III Fee. The reimbursement of available funds shall be made within 30 days as they are received by the School District.

Alternatively, no reimbursement is made to the person(s) subject to the Level III Fee and the School District's future State funds are reduced by the amount that would otherwise have been reimbursed.

SECTION V. GOVERNMENT CODE SECTION 66000

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

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

This SFNA has been prepared in accordance with applicable law to provide the factual basis for determining the Alternative Fees that may be collected from new residential development in the School District. The information set forth herein, including the information contained in the Appendices attached hereto, provide factual evidence establishing a nexus between the type of development projected to be built within the School District and the amount of Alternative Fees levied upon such development based on the need for such Alternative Fees. The determinations made in this SFNA meet the requirements of Government Code Section 66000. The findings are summarized as follows:

- (i) Government Code Section 65995.5(f) requires that Alternative Fees be expended solely on the school facilities identified in this SFNA as being attributable to projected enrollment growth from the construction of new residential units. The Alternative Fees will be used to fund school facilities required to accommodate Projected Unhoused Students generated by unmitigated Projected Units to the extent described in this SFNA and permitted by applicable law.
- (ii) For residential development, the relationship between existing homes and student enrollment is demonstrated by the students living in those homes. The Student Generation Rates calculated in Section II of this SFNA confirm that relationship.
- (iii) As shown in this SFNA, additional residential development will generate additional students. Existing facilities are not adequate to accommodate projected student enrollment as demonstrated in Table 8, therefore the School District will be required to provide additional school facilities as a result of new residential development.

- (iv) The Alternative Fees determined herein were calculated by and in accordance with applicable law and represent the costs that are permissible to include. For residential construction, the total cost impact to the School District is estimated at \$13.85 per square foot for units located within the School District (see Appendix “G” for further detail). Since the Alternative Fees are less than the estimated total cost impact to the School District, it is reasonable that the Alternative Fees determined herein are relatively proportional to the actual impact caused by new residential development on the School District.
- (v) The cost of new school facilities required to house students generated from new residential development is greater than the amount that may be funded solely by the collection of Alternative Fees.
- (vi) The School District maintains a fund for the deposit and accounting of developer fees, including Alternative Fees.

SECTION VI. REDEVELOPMENT

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

Residential redevelopment means voluntarily demolishing existing residential, commercial, and/or industrial structures and subsequently replacing them with new residential dwelling units (“Residential Redevelopment”). The School District is aware of Residential Redevelopment projects completed within the School District boundaries within the previous five (5) years and anticipates similar Residential Redevelopment projects may be completed in the next five (5) years. School fees authorized pursuant to Education Code Section 17620 and Government Code Sections 65995 et seq. (“School Fees”) shall be levied by the School District on new residential units resulting from Residential Redevelopment projects, if there is a nexus between the School Fees being imposed and the impact of new residential units on school facilities, after the impact of pre-existing development has been taken into consideration. In determining such nexus, the School District shall review, evaluate and determine on a case-by-case basis, the additional impact of the proposed new residential development by comparing the projected square footage, student generation and cost impacts of the proposed new residential units and the pre-existing residential, commercial and/or industrial development. Such analysis shall utilize the student generation rates identified in Tables 1, 2 and 3 of this SFNA, as applicable.

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

APPENDIX A
SAB FORMS AND ELIGIBILITY DETERMINATION

SCHOOL DISTRICT Poway Unified School District	FIVE DIGIT DISTRICT CODE NUMBER (see California Public School Directory) 68296
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) 667

Part H. District Student Yield Factor
 (Fifth-Year Projection Only) .8

Part A. K-12 Pupil Data

Grade	7th Prev.	6th Prev.	5th Prev.	4th Prev.	3rd Prev.	2nd Prev.	Previous	Current
	/	/	/	/	2014/2015	2015/2016	2016/2017	2017/2018
K					2977	2995	3068	3130
1					2462	2392	2470	2566
2					2563	2527	2442	2544
3					2672	2593	2576	2519
4					2707	2692	2625	2638
5					2641	2745	2710	2667
6					2651	2673	2734	2832
7					2631	2670	2684	2800
8					2568	2636	2654	2725
9					2628	2656	2746	2780
10					2706	2638	2695	2784
11					2669	2674	2611	2711
12					2531	2590	2640	2569
TOTAL					34406	34481	34655	35265

Part I. Projected Enrollment

1. Fifth-Year Projection

Enrollment/Residency - (except Special Day Class pupils)

K-6	7-8	9-12	TOTAL
20472	5501	11920	37893

Special Day Class pupils only - Enrollment/Residency

	Elementary	Secondary	TOTAL
Non-Severe	149	341	490
Severe	270	183	453
TOTAL	419	524	

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 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

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
10					4	2	0	3
11					28	42	27	17
12					115	124	124	116
TOTAL					147	168	151	136

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

	Elementary	Secondary	TOTAL
Non-Severe	138	323	461
Severe	250	173	423
TOTAL	388	496	

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
/	/	/	/	2014/2015	2015/2016	2016/2017	2017/2018

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)

Chad Koster

SIGNATURE OF DISTRICT REPRESENTATIVE



DATE

10/30/17

TELEPHONE NUMBER

858-679-2562

E-MAIL ADDRESS

ckoster@powayusd.com



Project Main Page

[Return to Search Results](#)

DSA eTracker: **04-100821**
 Application: **50/68296-00-001**
 County: **San Diego**
 District: **Poway Unified**
 Site: **CREEKSIDE ELEMENTARY**
 District Rep: **Mr. Chad Koster**

[Details](#) [Fund Releases](#) [Budget Summary](#) [Transaction Detail](#) [Modernization Eligibility](#) [New Construction Eligibility](#)

District Code	Attendance Area	Original SAB Approval Date	Recent SAB Approval																																		
68296	0	5/26/1999	5/22/2013																																		
<p>SAB 50-03 New Construction Eligibility Information</p> <p>New Construction Baseline Eligibility</p> <table> <thead> <tr> <th>Grade Level:</th> <th>K - 6</th> <th>7 - 8</th> <th>9 - 12</th> <th>Non-Severe</th> <th>Severe</th> </tr> </thead> <tbody> <tr> <td>Established Eligibility:</td> <td>4113</td> <td>2552</td> <td>5786</td> <td>0</td> <td>0</td> </tr> <tr> <td>SAB Approvals/Adjustments:</td> <td>-1741</td> <td>-2300</td> <td>-5310</td> <td>-59</td> <td>470</td> </tr> <tr> <td>Remaining Eligibility:</td> <td>2372</td> <td>252</td> <td>476</td> <td>-59</td> <td>470</td> </tr> </tbody> </table> <hr/> <p>SAB 50-03 Eligibility Document Status/Dates</p> <table> <tbody> <tr> <td>Status:</td> <td>PM Complete</td> </tr> <tr> <td>Date Signed:</td> <td>4/19/1999</td> </tr> <tr> <td>Date Received:</td> <td>2/11/1999</td> </tr> <tr> <td>SAB Approval Date:</td> <td>5/26/1999</td> </tr> </tbody> </table>						Grade Level:	K - 6	7 - 8	9 - 12	Non-Severe	Severe	Established Eligibility:	4113	2552	5786	0	0	SAB Approvals/Adjustments:	-1741	-2300	-5310	-59	470	Remaining Eligibility:	2372	252	476	-59	470	Status:	PM Complete	Date Signed:	4/19/1999	Date Received:	2/11/1999	SAB Approval Date:	5/26/1999
Grade Level:	K - 6	7 - 8	9 - 12	Non-Severe	Severe																																
Established Eligibility:	4113	2552	5786	0	0																																
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SAB Approval Date:	5/26/1999																																				

APPENDIX B
BONDING CAPACITY CALCULATION

**POWAY UNIFIED SCHOOL DISTRICT
BONDING CAPACITY CALCULATION
FISCAL YEAR 2017/2018
APPENDIX B**

1.	Total Assessed Valuation (Fiscal Year 2017/2018) ¹	\$41,181,602,197
2.	Applicable Percentage Bond Limit (Education Code Section 15102 or 15106)	<u>2.50%</u>
3.	Bonding Capacity (Item 1 times Item 2)	\$1,029,540,055

¹ County of San Diego, Office of the Auditor-Controller

APPENDIX C
FACILITY CAPACITY UPDATE

**POWAY UNIFIED SCHOOL DISTRICT
FACILITIES CAPACITY UPDATE
APPENDIX C**

Item	School	Elementary School Seats	Middle School Seats	High School Seats
SAB Form 50-02	NA	13,233	3,709	6,552
50/68296-00-001	CREEKSIDE ELEMENTARY	775	-	-
50/68296-00-002	WESTVIEW HIGH	-	-	2,241
50/68296-00-003	STONE RANCH ELEMENTARY	850	-	-
50/68296-00-004	OAK VALLEY MIDDLE	400	864	-
50/68296-00-005	MT. CARMEL HIGH	-	-	216
50/68296-00-006	WESTWOOD ELEMENTARY	325	-	-
50/68296-00-007	MIDLAND ELEMENTARY	200	-	-
50/68296-00-008	MONTEREY RIDGE ELEMENTARY	850	-	-
50/68296-00-009	MT. CARMEL HIGH	-	-	189
50/68296-00-011	MT. CARMEL HIGH	-	-	81
50/68296-00-012	POWAY HIGH	-	-	1,026
50/68296-00-013	RANCHO BERNARDO HIGH	-	-	27
50/68296-00-015	DEL SUR ELEMENTARY	825	-	-
50/68296-00-016	WILLOW GROVE ELEMENTARY	700	-	-
50/68296-00-017	DEL NORTE HIGH	-	-	1,297
50/68296-00-018	MEADOWBROOK MIDDLE	-	405	-
50/68296-00-019	BLACK MOUNTAIN MIDDLE	-	324	-
50/68296-00-020	MORNING CREEK ELEMENTARY	200	-	-
50/68296-00-021	DESIGN 39 CAMPUS	1,421	-	-
50/68296-00-022	STONE RANCH ELEMENTARY	475	-	-
Total		20,254	5,302	11,629
Grand Total for All School Levels		37,185		

APPENDIX D
ENROLLMENT SUMMARY

**POWAY UNIFIED SCHOOL DISTRICT
2017/2018 ENROLLMENT SUMMARY
APPENDIX D**

School Name/Program	School Level/Grade																Grand Total
	Elementary							Middle				High				Other	
	TK	K	1	2	3	4	5	6	7	8	9	10	11	12			
ADOBE BLUFFS ELEMENTARY	14	69	64	55	53	60	62	-	-	-	-	-	-	-	-	377	
CANYON VIEW ELEMENTARY	26	73	81	77	83	82	81	-	-	-	-	-	-	-	-	503	
CHAPARRAL ELEMENTARY	51	132	131	125	134	136	135	-	-	-	-	-	-	-	-	844	
CREEKSIDE ELEMENTARY	25	90	96	104	94	96	94	-	-	-	-	-	-	-	-	599	
DEER CANYON ELEMENTARY	20	62	87	73	78	81	91	-	-	-	-	-	-	-	-	492	
DEL SUR ELEMENTARY	45	155	165	145	153	157	121	-	-	-	-	-	-	-	-	941	
DESIGN 39 CAMPUS (K-5)	25	120	145	132	122	123	122	-	-	-	-	-	-	-	-	789	
GARDEN ROAD ELEMENTARY	26	74	83	80	51	83	82	-	-	-	-	-	-	-	-	479	
HIGHLAND RANCH ELEMENTARY	26	120	120	98	114	118	115	-	-	-	-	-	-	-	-	711	
LOS PENASQUITOS ELEMENTARY	22	77	78	80	79	97	97	-	-	-	-	-	-	-	-	530	
MIDLAND ELEMENTARY	24	104	101	104	91	100	107	-	-	-	-	-	-	-	-	631	
MONTEREY RIDGE ELEMENTARY	27	141	147	161	186	169	169	-	-	-	-	-	-	-	-	1,000	
MORNING CREEK ELEMENTARY	25	134	125	122	136	127	114	-	-	-	-	-	-	-	-	783	
PAINTED ROCK ELEMENTARY	25	95	103	102	108	98	126	-	-	-	-	-	-	-	-	657	
PARK VILLAGE ELEMENTARY	27	84	97	98	99	106	113	-	-	-	-	-	-	-	-	624	
POMERADO ELEMENTARY	17	64	61	58	52	56	69	-	-	-	-	-	-	-	-	377	
ROLLING HILLS ELEMENTARY	26	76	78	75	52	70	71	-	-	-	-	-	-	-	-	448	
SHOAL CREEK ELEMENTARY	23	91	96	78	94	92	90	-	-	-	-	-	-	-	-	564	
STONE RANCH ELEMENTARY	59	108	127	150	141	141	195	-	-	-	-	-	-	-	-	921	
SUNDANCE ELEMENTARY	23	55	65	70	59	84	83	-	-	-	-	-	-	-	-	439	
SUNSET HILLS ELEMENTARY	20	66	68	68	69	84	79	-	-	-	-	-	-	-	-	454	
TIERRA BONITA ELEMENTARY	26	56	64	71	82	87	75	-	-	-	-	-	-	-	-	461	
TURTLEBACK ELEMENTARY	29	101	99	106	78	101	93	-	-	-	-	-	-	-	-	607	
VALLEY ELEMENTARY	24	144	132	113	108	112	116	-	-	-	-	-	-	-	-	749	
WESTWOOD ELEMENTARY	25	125	134	148	143	128	120	-	-	-	-	-	-	-	-	823	
WILLOW GROVE ELEMENTARY	25	105	110	133	134	123	131	-	-	-	-	-	-	-	-	761	
BERNARDO HEIGHTS MIDDLE	-	-	-	-	-	-	-	542	520	483	-	-	-	-	-	1,545	
BLACK MOUNTAIN MIDDLE	-	-	-	-	-	-	-	442	453	425	-	-	-	-	-	1,320	
DESIGN 39 CAMPUS (6-8)	-	-	-	-	-	-	-	115	132	122	-	-	-	-	-	369	
MEADOWBROOK MIDDLE	-	-	-	-	-	-	-	453	455	471	-	-	-	-	-	1,379	
MESA VERDE MIDDLE	-	-	-	-	-	-	-	484	421	438	-	-	-	-	-	1,343	
OAK VALLEY MIDDLE	-	-	-	-	-	-	-	475	488	497	-	-	-	-	-	1,460	
TWIN PEAKS MIDDLE	-	-	-	-	-	-	-	409	412	372	-	-	-	-	-	1,193	
ABRAXAS HIGH	-	-	-	-	-	-	-	-	-	-	-	3	17	118	69	207	
DEL NORTE HIGH	-	-	-	-	-	-	-	-	-	-	586	568	516	494	1	2,165	
MOUNT CARMEL HIGH	-	-	-	-	-	-	-	-	-	-	482	481	484	468	-	1,915	
POWAY HIGH	-	-	-	-	-	-	-	-	-	-	591	588	541	543	-	2,263	
RANCHO BERNARDO HIGH	-	-	-	-	-	-	-	-	-	-	594	600	617	547	-	2,358	
WESTVIEW HIGH	-	-	-	-	-	-	-	-	-	-	583	602	602	571	-	2,358	
GRAND TOTAL*	705	2,521	2,657	2,626	2,593	2,711	2,751	2,920	2,881	2,808	2,836	2,842	2,777	2,741	70	36,439	
ELIGIBLE**	705	2,521	2,657	2,626	2,593	2,711	2,751	2,920	2,881	2,808	2,836	2,842	2,777	2,741	70	36,439	
ELIGIBLE BY SCHOOL LEVEL**								19,484		5,689					11,266	36,439	

*Does not include pre-school students.

APPENDIX E
SURPLUS PROPERTY AND LOCAL REVENUE SOURCES (LOCAL FUNDS)

Surplus Property and Local Funds (Government Code Section 65995.6(b))

Government Code Section 65995.6(b) requires that when determining the funds necessary to meet its facility needs, this SFNA identifies and considers the following:

- (i) Any surplus property 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 may be accommodated by excess capacity in existing facilities; and,
- (iii) Local resources, other than fees, charges, dedications, or other requirements imposed on residential construction available to finance the construction or reconstruction of school facilities needed to accommodate any growth in enrollment attributable to the construction of Projected Units (“Local Funds”).

In addition, Government Code Section 65995.5(c)(2) requires that the School District subtract the full amount of local funds that the governing board has dedicated to facilities necessitated by new housing from the Total New Construction Grant amount determined in this SFNA. The following is a summary of the findings related to these requirements:

SURPLUS PROPERTY

The School District has identified two (2) school sites that may be considered surplus. These sites are described as follows:

- (i) **Torrey Highlands Elementary School Site**—this 10.48-acre site is located at the northwest corner of Torrey Meadows Drive and Torrey Ranch Court. The site does not currently have school facilities, and environmental concerns have been raised about the feasibility of developing it. The site was acquired as part of a mitigation agreement; therefore, it is anticipated that if school facilities were constructed on this site, enrollment priority would be given to students generated from mitigated residential development. The site is deemed unavailable to accommodate the needs of students generated from unmitigated Projected Units. As of the date of this SFNA, the School District has not made a determination as to the future use or disposition of the site.
- (ii) **Santaluz/Torrey Highlands Middle School Site**—this 27.22-acre site is located at the intersection of Carmel Valley Road and Camino Del Sur and was acquired by the School District via a mitigation agreement. The site was acquired as part of a mitigation agreement; therefore, it is anticipated that if school facilities were constructed on this site, enrollment priority would be given to students generated from mitigated residential development. The site is deemed unavailable to accommodate the needs of students generated from unmitigated Projected Units. As of the date of this SFNA, the School District has not made a determination as to the future use or disposition of the site.

EXCESS CAPACITY IN EXISTING FACILITIES

As demonstrated in Table 7 of Section II.C of this SFNA, utilizing State guidelines for determining facility capacity prescribed under Education Code Section 17071.10 the School District has available capacity of 770 students at the elementary school level (grades K-6), deficit capacity of 387 students at the middle school level (grades 7 and 8) and surplus capacity of 363 students at the high school level (grades 9-12). As further described in Section II.C of the SFNA, utilization of a Five-Year Cohort Survival Enrollment Projection, which incorporates historical enrollment trends, including enrollment adjustments from existing housing, results in deficit capacity at all school levels within the next five (5) years. Therefore, zero (0) seats are deemed available to accommodate students generated from unmitigated Project Units.

LOCAL FUNDS

The following identifies and considers Local Funds available to the School District:

- (i) **General Obligation (“GO”) Bonds** — On November 5, 2002 the registered voters of the School District authorized the issuance and sale of not to exceed \$198,000,000 in general obligation bond indebtedness (Proposition U). In addition, on February 5, 2008 the registered voters of the School District authorized the issuance and sale of not to exceed \$179,000,000 in general obligation bond indebtedness (Proposition C). Since the election dates, the School District issued multiple series of general obligation bonds (“GO Bonds”). Therefore, there are no monies available to offset the impact of unmitigated Projected Units.
- (ii) **Developer Fees** — The School District currently collects Level II fees in the amount of \$3.93 per square foot for residential units. The School District also recently adopted statutory school fees in an amount up to the maximum Level I fee of \$3.79 per square foot on applicable existing residential construction, such as home additions, and up to \$0.61 per square foot for commercial/industrial construction. As of June 30, 2017, the balance of Level II fees and statutory fees collected by the School District was \$2,395,295.

Based on the findings determined in this Study, an estimated \$3,050,206 is projected to be collected in Level II Fees from new residential construction over the next five (5) years, assuming adoption of the proposed Level II Fee of \$3.90 per square foot. The full amount of the balance of Level II fees and statutory fees collected, in addition to forthcoming fees to be collected over the next five years, are available to offset the impact of unmitigated Projected Units.

- (iii) **State Funds** — The School District has applied for and received State Funding under the Leroy F. Greene School Facilities Act of 1998 for new school facility construction and modernization projects. The School District has submitted to the Office of Public School Construction (“OPSC”) the following School Facilities Program (“SFP”) new construction funding applications, which are currently pending:

**TABLE E-1
POTENTIAL STATE FUNDING**

PROJECT NUMBER	SITE NAME¹	APPLICATION NUMBER¹	OPSC RECEIVED DATE¹	ESTIMATED STATE GRANT¹
1	Design 39 Campus	50/68296-00-021	7/03/2014	\$18,922,769
2	Stone Ranch Elementary	50/68296-00-022	8/01/2017	\$6,508,805

¹ Office of Public School Construction: SFP Applications – New Construction, Career Technical Education and Charter School Facilities Program Workload as of March 31, 2018.

The School District anticipates the estimated grant amounts listed above will be funded from the sale of bonds authorized under the California Public School Facility Bond Initiative, also known as Proposition 51. Proposition 51 was approved by the voters on November 8, 2016 and authorized the issuance of \$9 billion in bonds, of which \$3 billion was designated for the construction of new school facilities. At this time, the State has issued bonds under the Proposition 51 authorization; however, the School District has not received apportionments for new school facilities projects and there are no guarantees to the School District of future funding or the actual amount to be apportioned by the State for new school facilities projects. Given the position of the School District’s SFP new construction applications on OPSC’s workload list, it is deemed reasonable to assume that the School District will potentially receive funding within the next five (5) years for Project Number 1. This amount is available to offset the impact of unmitigated Projected Units.

CALCULATION OF SURPLUS PROPERTY AND LOCAL FUNDS CREDIT

Surplus Property and Local Funds Available

The Surplus Property and Local Funds available to offset the impact of unmitigated Projected Units discussed above are summarized in Table E-2.

TABLE E-2
SURPLUS PROPERTY AND LOCAL FUNDS

DESCRIPTION	AMOUNT
<i>Surplus Property</i>	
Funds Available from Sale of Surplus Sites	\$0
<i>Local Funds</i>	
General Obligations Bond Proceeds Available	\$0
Developer Fees (on hand)	\$2,395,295
Projected Developer Fees (next 5 years) ¹	\$3,050,206
Potential State Funds	\$18,922,769
TOTAL SURPLUS PROPERTY AND LOCAL FUNDS	\$24,368,270

¹ Projected Developer Fees assumes adoption of proposed Level II fees at \$3.90 per square foot.

Currently Unhoused Student Impact

An analysis of the current capacity and enrollment of the School District found a capacity surplus of 770 students at the elementary school level and 363 at the high school level, but a capacity deficiency of 387 students at the middle school level. The capacity analysis is described in more detail in Section II.C of this SFNA. Table E-3 identifies the needs to house currently unhoused students from existing residential development through expansion of school sites and new school facility construction. The cost impact of current unhoused students is determined by multiplying the unhoused students (deficit capacity) shown in Table 7 of this SFNA by the cost per student calculated in Appendix “G” for each school level.

TABLE E-3
COST IMPACT OF CURRENTLY UNHOUSED STUDENTS

SCHOOL LEVEL	CURRENT UNHOUSED STUDENTS	COST PER STUDENT	CURRENT UNHOUSED STUDENT IMPACT
Elementary School (K-5)	0	\$43,734	\$0
Middle School (6-8)	387	\$48,103	\$18,615,861
High School (9-12)	0	\$57,401	\$0
TOTAL	387	NA	\$18,615,861

Projected Unhoused Student Impact

Table E-4 identifies the number of school facilities required to house the projected unhoused students generated by unmitigated projected units. The cost impact of projected unhoused students is determined by multiplying the Projected Unhoused Students shown in Table 8 of this SFNA by the cost per student calculated in Appendix “G” for each school level.

**TABLE E-4
COST IMPACT OF PROJECTED UNHOUSED STUDENTS**

SCHOOL LEVEL	PROJECTED UNHOUSED STUDENTS	COST PER STUDENT	PROJECTED UNHOUSED STUDENT IMPACT
Elementary School (K-5)	123	\$43,734	\$5,379,282
Middle School (6-8)	48	\$48,103	\$2,308,944
High School (9-12)	54	\$57,401	\$3,099,654
TOTAL	225	NA	\$10,787,880

Local Funds Credit

Considering the cost impact of the Current Unhoused Students and Projected Unhoused Students described above in Tables E-3 and E-4 and subtracting those figures from the Local Funds identified in Table E-2 results in a funding deficit of \$5,035,471. This calculation is shown in Table E-5. Since the cost impacts are greater than the local funds available, there are no surplus funds available to offset the impact of unmitigated Projected Units.

**TABLE E-5
LOCAL FUNDS DETERMINATION**

DESCRIPTION	AMOUNT
Surplus Property and Local Funds Available	\$24,368,270
Current Unhoused Student Impact	(\$18,615,861)
Projected Unhoused Student Impact	(\$10,787,880)
SURPLUS (DEFICIT) OF LOCAL FUNDS	(\$5,035,471)

APPENDIX F
GENERAL SITE DEVELOPMENT GRANT (GSDG) DETERMINATION

**POWAY UNIFIED SCHOOL DISTRICT
GENERAL SITE DEVELOPMENT GRANT CALCULATION
APPENDIX F**

Additional Grant as Percentage of Per Pupil Grant

School Level	Base per Pupil Grant	Percent	Total Additional Grant	Additional Grant
Elementary School	\$11,775	6.00%	\$707	\$353
Middle School	\$12,483	6.00%	\$749	\$374
High School	\$15,838	3.75%	\$594	\$297

Allowable Grant per School Facility

School Level	Grant Per New Useable Acre	Site Acreage ^[1]	School Facility Grant
Elementary School	\$18,827	12.7	\$239,103
Middle School	\$18,827	22.5	\$423,608
High School	\$18,827	46.5	\$875,456

[1] Derived based on guidelines established in the "School Site Analysis and Development Handbook" as of January 1, 1998

Grant Amount per Pupil

School Level	School Facility Grant	Facility Capacity	Grant per Pupil
Elementary School	\$239,103	850	\$281
Middle School	\$423,608	1,380	\$307
High School	\$875,456	2,410	\$363

Total per Pupil Grant for Site Development

School Level	Allowable Additional Grant	Grant per Pupil	Total Grant for Site Development
Elementary School	\$353	\$281	\$634
Middle School	\$374	\$307	\$681
High School	\$297	\$363	\$660

APPENDIX G
ESTIMATE OF ACTUAL AVERAGE
SCHOOL FACILITY COST PER SQUARE FOOT

**POWAY UNIFIED SCHOOL DISTRICT
ESTIMATE OF ACTUAL AVERAGE SCHOOL FACILITY COST PER SQUARE FOOT
APPENDIX G**

True Cost Per Student

School Level	Total Estimated Cost	Projected Students Housed	True Cost per Student
Elementary School	\$37,174,000	850	\$43,734
Middle School	\$66,381,573	1,380	\$48,103
High School	\$138,335,749	2,410	\$57,401

True Cost Per Dwelling Unit

School Level	Cost per Student	Blended Student Generation Rate	True Cost per Dwelling Unit
Elementary School	\$43,734	0.2887	\$12,626
Middle School	\$48,103	0.1121	\$5,392
High School	\$57,401	0.1249	\$7,169
Total	\$149,238	0.5257	\$25,188

True Cost per Square Foot

School Level	True Cost per Dwelling Unit	Average Square Footage [1]	True Cost Per Square Foot
Elementary School	\$12,626	1,819	\$6.94
Middle School	\$5,392	1,819	\$2.96
High School	\$7,169	1,819	\$3.94

[1] Total projected square footage divided by the total number of unmitigated Projected Units.

True Cost per Square Foot per School Level

School Level	True Cost Per Square Foot
Elementary School	\$6.94
Middle School	\$2.96
High School	\$3.94
Total	\$13.85

**POWAY UNIFIED SCHOOL DISTRICT
ESTIMATED ACTUAL COST PER SQUARE FOOT CALCULATION
SUMMARY OF ESTIMATED COSTS
APPENDIX G**

ELEMENTARY SCHOOL

I. Site Costs		\$0
Land Acquisition Cost ¹	\$0	
Acres	12.70	
Cost per Acre	\$0	
Appraisals	\$0	
Surveys	\$0	
Escrow/Title	\$0	
II. Planning Costs		3,161,034
Architect/Engineering Fees ²	\$2,959,785	
DSA Fees ²	155,249	
Energy Analysis	6,000	
Preliminary Tests	30,000	
Other Costs	10,000	
III. Construction Costs		32,449,157
Construction ³	\$29,597,850	
Construction Management ²	2,851,307	
IV. Tests		130,000
V. Inspection		135,000
VI. Furniture & Equipment⁴		930,750
VII. Contingency⁵		368,059
TOTAL ESTIMATED COST		<u><u>\$37,174,000</u></u>

¹ The School District does not plan to acquire new school sites

² See Cost Detail Worksheet

³ Estimated at \$477 per square foot and assumes 73 square feet per student for a school with the capacity to house 850 students.

⁴ Estimated at \$15 per square foot and assumes 73 square feet per student for a school with the capacity to house 850 students.

⁵ Sum of I. thru VI. multiplied by 1%

**POWAY UNIFIED SCHOOL DISTRICT
ESTIMATED ACTUAL COST PER SQUARE FOOT CALCULATION
SUMMARY OF ESTIMATED COSTS
APPENDIX G**

MIDDLE SCHOOL

I. Site Costs		\$0
Land Acquisition Cost	\$0	
Acres	22.50	
Cost per Acre	\$0	
Appraisals	\$0	
Surveys	\$0	
Escrow/Title	\$0	
II. Planning Costs		6,130,558
Architect/Engineering Fees ¹	\$5,792,688	
DSA Fees ¹	272,870	
Energy Analysis	15,000	
Preliminary Tests	35,000	
Other Costs	15,000	
III. Construction Costs		57,587,772
Construction ²	\$52,660,800	
Construction Management ¹	4,926,972	
IV. Tests		150,000
V. Inspection		200,000
VI. Furniture & Equipment³		1,656,000
VII. Contingency⁴		657,243
TOTAL ESTIMATED COST		<u><u>\$66,381,573</u></u>

¹ See Cost Detail Worksheet

² Estimated at \$477 per square feet and assumes 80 square foot per student for a school with the capacity to house 1,380 students.

³ Estimated at \$15 per square feet and assumes 80 square foot per student for a school with the capacity to house 1,380 students.

⁴ Sum of I. thru VI. multiplied by 1%

**POWAY UNIFIED SCHOOL DISTRICT
ESTIMATED ACTUAL COST PER SQUARE FOOT CALCULATION
SUMMARY OF ESTIMATED COSTS
APPENDIX G**

HIGH SCHOOL

I. Site Costs		\$0
Land Acquisition Cost	\$0	
Acres	46.50	
Cost per Acre	\$0	
Appraisals	\$0	
Surveys	\$0	
Escrow/Title	\$0	
II. Planning Costs		13,756,365
Architect/Engineering Fees ¹	\$13,105,098	
DSA Fees ¹	561,267	
Energy Analysis	25,000	
Preliminary Tests	45,000	
Other Costs	20,000	
III. Construction Costs		119,225,474
Construction ²	\$109,209,150	
Construction Management ¹	10,016,324	
IV. Tests		250,000
V. Inspection		300,000
VI. Furniture & Equipment³		3,434,250
VII. Contingency⁴		1,369,661
TOTAL ESTIMATED COST		<u><u>\$138,335,749</u></u>

¹ See Cost Detail Worksheet

² Estimated at \$477 per square feet and assumes 95 square foot per student for a school with the capacity to house 2,410 students.

³ Estimated at \$15 per square feet and assumes 95 square foot per student for a school with the capacity to house 2,410 students.

⁴ Sum of I. thru VI. multiplied by 1%

**POWAY UNIFIED SCHOOL DISTRICT
ESTIMATED COST DETAIL FOR ELEMENTARY SCHOOL
APPENDIX G**

SOFT COSTS

Architect's Fee

ARCHITECT'S DESIGN FEE		
CONSTRUCTION COSTS		\$29,597,850
TOTAL FEE	10.00%	\$2,959,785

DSA Access Compliance Fee

DSA ACCESS COMPLIANCE FEE		
CONSTR. COSTS		\$29,597,850
FEE CALCULATION	FEE %	FEE
FIRST \$500,000	0.20%	\$1,000
NEXT \$1,500,000	0.10%	\$1,500
OVER \$2,000,000	0.01%	\$2,760
TOTAL FEE	0.02%	\$5,260

DSA Structural Safety Fee

DSA STRUCTURAL SAFETY FEE		
CONSTR. COSTS		\$29,597,850
FEE CALCULATION	FEE %	FEE
FIRST \$1,000,000	0.70%	\$7,000
OVER \$1,000,000	0.50%	\$142,989
TOTAL FEE	0.51%	\$149,989

CONSTRUCTION MANAGER'S FEE

CONSTRUCTION MANAGER'S FEE		
CONSTR. COSTS		\$29,597,850
FEE CALCULATION	FEE %	FEE
FIRST \$500,000	8.00%	\$40,000
NEXT \$500,000	7.50%	\$37,500
NEXT \$1,000,000	7.00%	\$70,000
NEXT \$4,000,000	6.00%	\$240,000
NEXT \$4,000,000	5.00%	\$200,000
OVER \$10,000,000	4.00%	\$783,914
GENERAL CONDITIONS	5.00%	\$1,479,893
TOTAL FEE	9.63%	\$2,851,307

**POWAY UNIFIED SCHOOL DISTRICT
ESTIMATED COST DETAIL FOR MIDDLE SCHOOL
APPENDIX G**

SOFT COSTS

Architect's Fee

ARCHITECT'S DESIGN FEE		
CONSTRUCTION COSTS		\$52,660,800
TOTAL FEE	11.00%	\$5,792,688

DSA Access Compliance Fee

DSA ACCESS COMPLIANCE FEE		
CONSTR. COSTS		\$52,660,800
FEE CALCULATION	FEE %	FEE
FIRST \$500,000	0.20%	\$1,000
NEXT \$1,500,000	0.10%	\$1,500
OVER \$2,000,000	0.01%	\$5,066
TOTAL FEE	0.01%	\$7,566

DSA Structural Safety Fee

DSA STRUCTURAL SAFETY FEE		
CONSTR. COSTS		\$52,660,800
FEE CALCULATION	FEE %	FEE
FIRST \$1,000,000	0.70%	\$7,000
OVER \$1,000,000	0.50%	\$258,304
TOTAL FEE	0.50%	\$265,304

CONSTRUCTION MANAGER'S FEE

CONSTRUCTION MANAGER'S FEE		
CONSTR. COSTS		\$52,660,800
FEE CALCULATION	FEE %	FEE
FIRST \$500,000	8.00%	\$40,000
NEXT \$500,000	7.50%	\$37,500
NEXT \$1,000,000	7.00%	\$70,000
NEXT \$4,000,000	6.00%	\$240,000
NEXT \$4,000,000	5.00%	\$200,000
OVER \$10,000,000	4.00%	\$1,706,432
GENERAL CONDITIONS	5.00%	\$2,633,040
TOTAL FEE	9.36%	\$4,926,972

**POWAY UNIFIED SCHOOL DISTRICT
ESTIMATED COST DETAIL FOR HIGH SCHOOL
APPENDIX G**

SOFT COSTS

Architect's Fee

ARCHITECT'S DESIGN FEE		
CONSTRUCTION COSTS		\$109,209,150
TOTAL FEE	12.00%	\$13,105,098

DSA Access Compliance Fee

DSA ACCESS COMPLIANCE FEE		
CONSTR. COSTS		\$109,209,150
FEE CALCULATION	FEE %	FEE
FIRST \$500,000	0.20%	\$1,000
NEXT \$1,500,000	0.10%	\$1,500
OVER \$2,000,000	0.01%	\$10,721
TOTAL FEE	0.01%	\$13,221

DSA Structural Safety Fee

DSA STRUCTURAL SAFETY FEE		
CONSTR. COSTS		\$109,209,150
FEE CALCULATION	FEE %	FEE
FIRST \$1,000,000	0.70%	\$7,000
OVER \$1,000,000	0.50%	\$541,046
TOTAL FEE	0.50%	\$548,046

CONSTRUCTION MANAGER'S FEE

CONSTRUCTION MANAGER'S FEE		
CONSTR. COSTS		\$109,209,150
FEE CALCULATION	FEE %	FEE
FIRST \$500,000	8.00%	\$40,000
NEXT \$500,000	7.50%	\$37,500
NEXT \$1,000,000	7.00%	\$70,000
NEXT \$4,000,000	6.00%	\$240,000
NEXT \$4,000,000	5.00%	\$200,000
OVER \$10,000,000	4.00%	\$3,968,366
GENERAL CONDITIONS	5.00%	\$5,460,458
TOTAL FEE	9.17%	\$10,016,324

APPENDIX H
FIVE-YEAR COHORT SURVIVAL ENROLLMENT PROJECTION

**POWAY UNIFIED SCHOOL DISTRICT
FIVE-YEAR COHORT SURVIVAL ENROLLMENT PROJECTION
APPENDIX H**

GRADE LEVEL	HISTORICAL ENROLLMENT ^[1]				PROJECTED ENROLLMENT ^[2]					
	2014/2015	2015/2016	2016/2017	2017/2018	2018/2019	2019/2020	2020/2021	2021/2022	2022/2023	
TK/K	3,091	3,108	3,198	3,226	3,273	3,320	3,367	3,414	3,461	
1	2,540	2,465	2,553	2,657	2,666	2,713	2,760	2,807	2,854	
2	2,642	2,607	2,522	2,626	2,724	2,733	2,780	2,827	2,874	
3	2,753	2,673	2,651	2,593	2,681	2,779	2,788	2,835	2,882	
4	2,790	2,780	2,708	2,711	2,639	2,727	2,825	2,834	2,881	
5	2,730	2,838	2,803	2,751	2,748	2,676	2,764	2,862	2,871	
6	2,717	2,758	2,821	2,920	2,809	2,806	2,734	2,822	2,920	
7	2,697	2,737	2,778	2,881	2,960	2,849	2,846	2,774	2,862	
8	2,641	2,707	2,728	2,808	2,895	2,974	2,863	2,860	2,788	
9	2,695	2,723	2,808	2,836	2,909	2,996	3,075	2,964	2,961	
10	2,787	2,706	2,757	2,842	2,866	2,939	3,026	3,105	2,994	
11	2,761	2,796	2,696	2,777	2,850	2,874	2,947	3,034	3,113	
12	2,694	2,804	2,849	2,741	2,824	2,897	2,921	2,994	3,081	
TOTAL (K-12)	35,538	35,702	35,872	36,369	36,844	37,283	37,696	38,132	38,542	

^[1] Source: California Department of Education-DataQuest; 2017/2018 enrollment information received from the School District.

^[2] Determined utilizing the cohort survival enrollment projection method in accordance with California Code of Regulations, Title II, Section 1859.40 , utilizing standard 3-2-1 weighting factors. Does not include adjustments for birth rate factors.