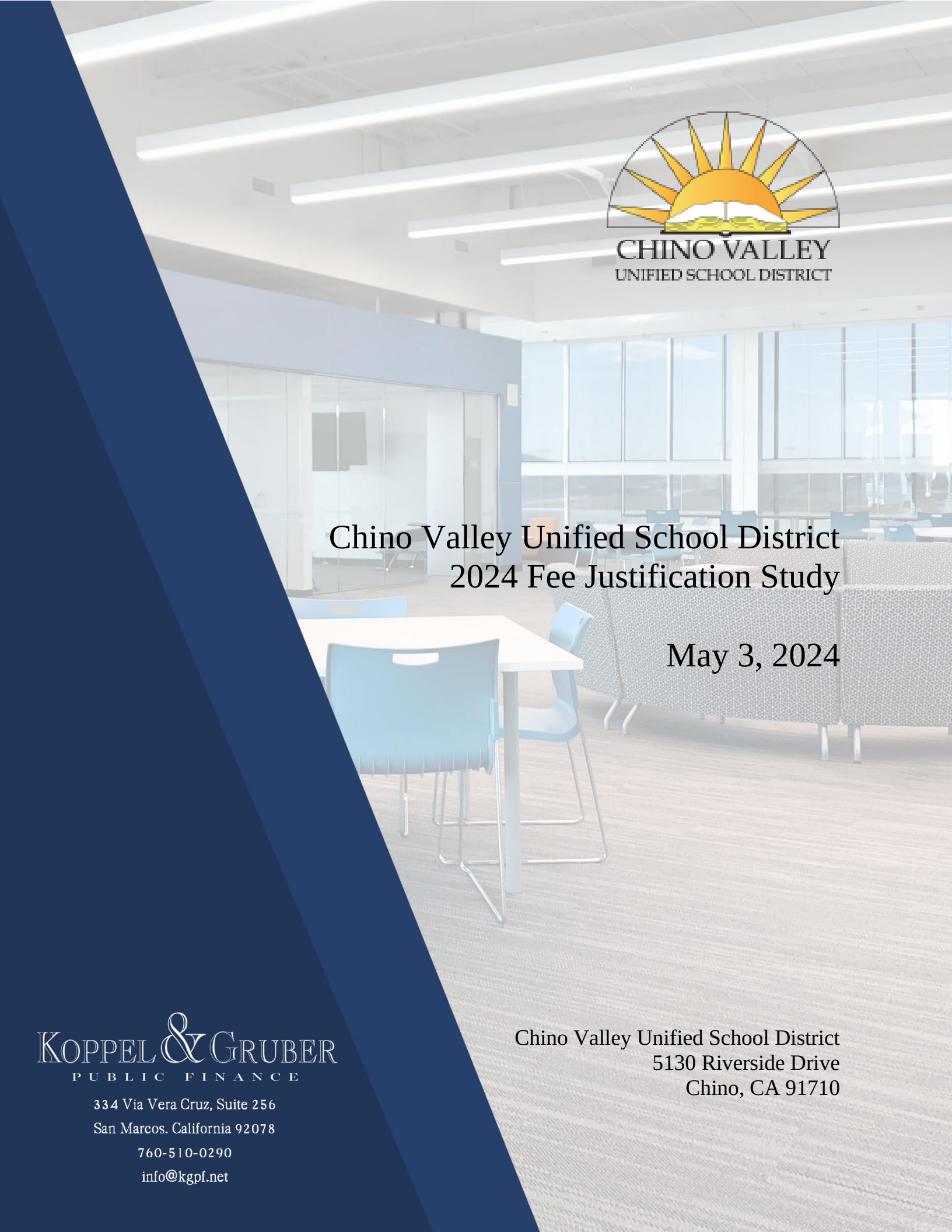

CHINO VALLEY
UNIFIED SCHOOL DISTRICT

Chino Valley Unified School District
2024 Fee Justification Study

May 3, 2024

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EXECUTIVE SUMMARY

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

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

The State Allocation Board ("SAB") reviews and may adjust the maximum authorized School Fees every January in even-numbered years. The SAB increased the Level I fee on January 24, 2024, and the maximum School Fees authorized by Education Code Section 17620 are currently $5.17 per square foot for residential construction/reconstruction and $0.84 per square foot for commercial/industrial construction for unified school districts.

The School District serves areas within portions of unincorporated San Bernardino County, and the Cities of Chino Hills, Chino and Ontario, and provides education for transitional kindergarten (TK) through 12th grade. Based on the findings presented in this Study, the School District is justified in collecting the maximum residential and commercial/industrial School Fees[1]. The findings are summarized as follows:

Residential Development

New residential development in the School District is projected over the next ten (10) years and beyond. Based on student generation rates determined for the School District, new residential development could generate an estimated 3,268 new students over the next ten (10) years. An analysis of the School District's existing facilities capacity and enrollment demonstrates the projected student enrollment supports the expansion, reconstruction and/or refurbishment of existing school facilities, and construction of new school facilities in areas within the School District where higher and disproportionate student enrollment growth is expected. The school facilities cost impact per residential square foot as determined in this Study are shown in Table E-1.

[1] Except for the new commercial/industrial development categorized as Rental Self-storage and Hospitality (Lodging) as further described in this Study.

TABLE E-1
Residential School Facilities Cost Impact/Applicable Residential School Fee Per Square Foot

Impact Per Square Foot	Applicable Residential School Fee Per Square Foot
$7.10	**$5.17**

The cost impact per square foot of residential construction/reconstruction shown in Table E-1 is greater than the maximum authorized residential School Fee, which is $5.17 per square foot; therefore, the School District is reasonably justified in levying statutory Level I school fees in an amount up to but not exceeding $5.17 per square foot (the "Applicable Residential School Fee").

Commercial/Industrial Development

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

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

The cost impacts per square foot for each category of commercial/industrial construction are equal to or exceed $0.84 per square foot, the School District's maximum authorized School Fee per square foot applicable to new commercial/industrial development; except for Rental Self-Storage where School Fees of $0.05 per square foot are justified and Hospitality (Lodging) where School Fees of $0.81 per square foot are justified ("Applicable Com/Ind School Fees"). Therefore, the School District is fully justified in levying commercial/industrial School Fees on new commercial/industrial development in an amount up to but not exceeding the Applicable Com/Ind School Fees. The Applicable Com/Ind School Fees that may be charged by the School District are summarized in Table E-2.

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

Commercial/Industrial Category	Impact Per Square Foot	Maximum Applicable School Fees
Banks	$2.02	**$0.84**
Community Shopping Center	$1.10	**$0.84**
Neighborhood Shopping Center	$2.00	**$0.84**
Industrial Business Parks	$2.52	**$0.84**
Industrial Parks/Warehousing/Manufacturing	$0.97	**$0.84**
Rental Self-Storage	$0.05	**$0.05**
Research & Development	$2.18	**$0.84**
Hospitality (Lodging)	$0.81	**$0.81**
Commercial Offices (Standard)	$3.43	**$0.84**
Commercial Offices (Large High Rise)	$3.25	**$0.84**
Corporate Offices	$1.92	**$0.84**
Medical Offices	$3.05	**$0.84**

SECTION I. LEGISLATION AND LEGAL REQUIREMENTS

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

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

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

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

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

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

SB 50 also limited the power of cities and counties to require mitigation of school facilities impacts as a condition of approving new development and suspended the court cases known as Mira-Hart-Murrieta. The Mira-Hart-Murrieta cases previously permitted school districts to collect mitigation fees in excess of school fees under certain circumstances.

On November 5, 2002, California voters passed Proposition 47, which authorized the issuance of $13.05 billion in State bonds and also enacted AB 16, which provided for additional reformation of the School Building Program. AB 16, among other items, clarified that if the SAB is no longer approving apportionments for new construction due to the lack of funds available for new school facilities construction, a school district may increase its Level II Fee to the Level III Fee. With the issuance of the State bonds authorized by the passage of Proposition 47, this section of AB 16 became inoperable.

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

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

SECTION II. PROJECTED UNHOUSED STUDENTS AND ESTIMATED FACILITY AND PER STUDENT COSTS

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

A. SCHOOL DISTRICT CAPACITY AND STUDENT ENROLLMENT

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

The School District currently operates twenty (20) schools serving grades TK through 6 ("Elementary School"), five (5) schools serving grades 7 through 8 ("Junior High School"), and five (5) schools serving grades 9 through 12 ("High School"), and two schools serving grades TK-8 (students in grades TK-6 are categorized as Elementary School students and students in grades 7 and 8 are categorized as Junior High School students). Per Education Code Section 17071.10, these facilities have a capacity to accommodate 34,438 students. Pursuant to Education Code Section 17071.30, portable classrooms were not included in the calculation to the extent they are (i) leased through the State Relocatable Classroom Program, (ii) leased for a period of less than five (5) years, (iii) leased when needed as interim housing (project basis), or (iv) represent the number of portables that exceed 25% of the School District's permanent classrooms. Appendix "B" provides a calculation of the updated facility capacity. It should be noted these capacities are driven by State loading standards and do not necessarily reflect the School District's program goals or the condition of such facilities.

Based on Student Enrollment Data as of October 2023, the student enrollment of the School District is 25,417 students. A summary of the student enrollment data is included in Appendix "C". Current available capacity is calculated by subtracting current student enrollment from existing school facilities capacity for each school level. This operation results in a surplus of available seats at all school levels. The available capacity calculation is shown in Table 1.

TABLE 1
Facilities Capacity and Student Enrollment

School Level	Existing Facilities Capacity	Student Enrollment (October 2023)	Available/ (Deficit) Capacity
Elementary School	16,557	12,690	3,867
Junior High School	6,000	3,861	2,139
High School	11,881	8,866	3,015
Total	**34,438**	**25,417**	**9,021**

B. PROJECTED UNHOUSED STUDENTS

1. Projected Residential Units

To estimate projected residential unit growth over the next ten (10) years, Koppel & Gruber Public Finance ("K&G Public Finance") obtained and compiled information from San Bernardino County and the Cities of Chino Hills, Chino and Ontario including, but not limited to lists of residential projects planned, approved and under construction. Such information was used to project residential development for areas within each planning jurisdiction by housing type. Based on the information, it is estimated the School District could experience the development of an estimated 5,728 residential units over the next ten (10) years ("Projected Units"). There are no projected units identified within the Unincorporated areas of San Bernardino County within the District's boundaries.

The types of residential units[2] considered include:

(i) **Single family detached ("SFD")** –dwelling units with no common walls and assigned an individual and separate assessor's parcel;

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

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

It should be noted that Mobile homes are not included in this analysis. [3]

[2] Accessory Dwelling Units (ADUs) or Junior ADUs are independent residential dwelling units located on the same parcel as a primary residential dwelling. ADUs may be detached, attached, or located within the primary dwelling, including within garages and storage areas. ADUs are generally considered new construction because they are living areas that did not previously exist on the parcel or as a part of the primary home. Whether ADUs are called casitas, granny flats, in-law units, generational units, or converted living space, these areas are intended to provide a new area for living and sleeping – essentially a new residential unit which did not previously exist. The School District recognizes that students are projected to be generated from ADUs and will charge the appropriate fee rate for these types of new construction projects.

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

None of the Projected Units have mitigated their impact through the execution of a mitigation agreement and/or Community Facilities District, whereby the terms of the mitigation agreements or Community Facilities Districts require mitigation payments in lieu of paying School Fees ("Mitigated"). Any property owners and/or developers that have not entered into a mitigation agreement or included in a CFD are subject to the payment of School Fees ("Unmitigated"). The estimated total Projected Units Unmitigated Projected Units, and Mitigated Project Units in the entire School District are summarized by residential category in Table 2.

TABLE 2
Projected Units by Residential Category

Residential Category	Unmitigated Projected Units	Mitigated Projected Units	Total Projected Units
Single-Family Detached (SFD)	2,685	0	2,685
Single-Family Attached (SFA)	1,955	0	1,955
Multi-Family Attached (MF)	3,101	0	3,101
Total	**7,741**	**0**	**7,741**

2. Student Generation Rates

In order to calculate student generation rates ("SGRs"), K&G Public Finance first obtained property characteristic data from the County Assessor's Office. Parcels in the data file were classified by unit type (SFD, SFA and MF). Due to the County data missing unit counts in certain instances, K&G Public Finance compiled unit counts based on information from data from the US Census Bureau[4] resulting in a total of 43,452 SFDs, 3,888 SFAs and 10,440 MFs within the School District.

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

[4] 2022 American Community Survey 5-Year Estimates; DP04-Selected Housing

TABLE 3
Student Generation Rates

School Level	SFD Units	SFA Units	MF Units
Elementary School	0.2090	0.3603	0.1525
Junior High School	0.0661	0.0792	0.0447
High School	0.1523	0.1865	0.0920
Total	**0.4274**	**0.6260**	**0.2892**

3. Projected Student Enrollment

Projected student enrollment was determined by multiplying the SGRs in Table 3 by the number of Unmitigated Projected Units as shown in Table 2. A total of 3,268 students are estimated to be generated from Unmitigated Projected Units. This is a conservative estimate since the School District's demographic studies indicate that the areas where residential development is taking place tend to generate students at a higher rate than the districtwide averages. The projected student enrollment is summarized by school level in Table 4.

TABLE 4
Projected Student Enrollment by School Level

School Level	Projected Student Enrollment from Unmitigated Projected Units
Elementary School	1,738
Junior High School	471
High School	1,059
Total	**3,268**

4. Projected Unhoused Students

As shown in Table 1, facilities capacity exceeds enrollment at the Elementary School, Junior High School and High School levels. While these findings indicate the School District's collective capacity is available at all school levels to accommodate projected students from new development over the course of the planning period, the analysis does not consider (i) the condition and adequacy of existing capacity, (ii) the availability of capacity within areas of the School District where a greater and disproportionate amount of new development is expected; and/or (iii) the service and educational goals of the School District.

As further described in this Study, capacity improvements are necessary for the long-term use to adequately house the existing student population and future enrollment from new housing at all school levels. The School District's facility needs are discussed in more detail in Section II.C.1. The facility needs exist regardless of the availability of capacity to house student enrollment, inclusive of student enrollment generated from new development. Therefore, for the purpose of this analysis, Projected Student Enrollment is not adjusted by available capacity and student enrollment attributable to new housing that requires a seat (facilities), including new facilities and/or facilities to

be replaced for their continued useful life ("Projected Unhoused Students") is equal to Projected Student Enrollment. Table 5 shows the determination of Projected Unhoused Students by school level.

TABLE 5
Projected Unhoused Students

School Level	Projected Student Enrollment	Available Seat Adjustment	Projected Unhoused Students
Elementary School	1,738	-	1,738
Junior High School	471	-	471
High School	1,059	-	1,059
Total	**3,268**	**-**	**3,268**

C. FACILITY NEEDS AND ESTIMATED PER SEAT/STUDENT COST

1. Facilities Needs

Government Code Section 66001 (g) allows School Fees to include the costs attributable to the increased demand for public facilities reasonably related to the development project(s) in which the fee is imposed in order to (1) refurbish existing facilities to maintain the existing level of service or (2) achieve an adopted level of service that is consistent with the general plan[5]. Education Code section 17620 authorizes school districts to assess School Fees to fund the "construction or reconstruction of school facilities."

On June 15, 2016, the School District conducted a Facilities Master Plan (the "2016 Plan"). The 2016 Plan identifies both the short- and long-range facilities needs and strategic goals of the School District and focuses on improvements that are necessary to provide adequate housing and the continued use of the School District's existing facilities. The estimated costs of the short- and long-range master plan projects amount to $1,029,786,803.

The 2016 Plan demonstrates capital improvement projects are necessary for the long-term use and adequate housing of student enrollment within the School District. The 2016 Plan outlined plans to replace portable classrooms with permanent facilities where needed, classroom and instructional technology updates to support 21st century instruction, and security improvements.

In November 2016, a ballot measure ("Measure G") was approved by the electors and authorized the issuance of general obligation bonds in an amount not to exceed $750 million to finance modernization updates, and technology and safety improvements to the School District. As of the date of this Study, the School District has issued four (4) series of bonds under in the Measure G authorization in the aggregate principal amount approximating $706.5 million ("Measure G Bond Program"), of which approximately $535.8 million has been spent towards projects detailed in the 2016 Plan[6].

[5] See also Shapell Industries, Inc. v. Governing Board (1991) 1 Cal. App. 4th 218.
[6] As of December 2023. Includes expenditures from Fund 25.

Under the Measure G Bond Program, as well as funding from the collection of School Fees (Fund 25), many of the facilities projects identified in the 2016 Plan have been funded and completed, including but not limited to technology infrastructure upgrades, safety and security upgrades, schoolwide modernization at certain campuses, and the complete demolition and reconstruction of Chino High School, which reopened in 2022.

A draft update to the 2016 Plan was prepared by the School District in March 2024 (the "2024 Plan Update"). The 2024 Plan Update continues to emphasize the goals of the 2016 Plan and focuses on improvements that are necessary to provide adequate housing and the continued use of the School District's existing facilities. As noted in the 2024 Plan Update, many school campuses, including Cal Aero Preserve Academy, Chaparral Elementary School, Edwin Rhodes Elementary, Liberty Elementary, Wickman Elementary, Woodcrest Junior High School, and Chino Hills High School, will qualify for modernization under the State modernization program within the next ten (10) years, however the 2024 Plan Update is preliminary, and does not include estimated costs for schoolwide modernization at the sites . An estimate of the costs to provide modernization at the listed sites is included as Appendix "E" of this Study, and such estimates are based on recent costs experienced by the School District to implement schoolwide modernization at specific school sites. It should be noted that the implementation of capital improvements for modernization is expected at school sites other than those listed above, as required, in future years.

Furthermore, the capacity analysis shown in Table 1 does not consider the availability of capacity within areas of the School District where a greater and disproportionate amount of new development is expected. Major residential development projects are planned in certain areas of the School District. For example, over 5,000 additional units are planned for the build-out of The Preserve Specific Plan located in the City of Chino ("Preserve Area"). Students residing in the Preserve Area are currently served by one (1) TK-8 site (Cal Aero Preserve Academy) and the site has exceeded its design capacity. A second TK-8 school is currently being constructed within the Preserve Area (Legacy Academy). The site has a design capacity of 1,200 seats[7] and is scheduled to open for the 2024/2025 school year. An analysis was conducted for the current enrollment and facilities capacity at the existing school sites serving the Preserve Area, as well as the additional capacity with the opening of the Legacy Academy, and projected student enrollment from residential units planned in the Preserve Area. A total of 3,002 residential units are projected within the Preserve Area over the next ten (10) years ("Preserve Area Projected Units")[8] , and such units are conservatively expected to generate more than 731 students at the Elementary School level, 191 at the Junior High School level, and 433 students at the High School level ("Preserve Area Projected Enrollment") given the high student generation rates in the Preserve Area. Based on the Preserve Area Projected Enrollment the construction of new classroom facilities will be required at the Elementary School

[7] Capacity is based on the school site operating on a continuous multi-track, year-round schedule. The estimated capacity of the site operating on a traditional schedule is approximately 800 seats.

[8] All Preserve Area Projected Units are included as Unmitigated Projected Units per the definition in Section II.B.

level (TK-6) and Junior High School level (7-8) to accommodate the expected student growth. While the opening of the Legacy Academy will accommodate student growth in the Preserve Area, additional school facilities may be required as the Preserve Area builds out.

2. Estimated Cost Per Seat/Student

The estimated costs per student to provide adequate school facilities to house Projected Unhoused Students for each school level was determined based on (1) estimated costs to provide for the modernization of existing Elementary School, Junior High School and High Schools, and (2) estimated costs for construction of new TK-8 school facilities. The cost estimates are included in Appendix "E" of this Study. Tables 6 and 7 below summarize the costs on a Facilities Impact per Seat/Student basis.

TABLE 6
Facilities Cost Impact Per Seat/Student for Modernization

School Level	Facilities Cost Impact per Seat/Student (Modernization)
Elementary School	**$25,323**
Junior High School	**$21,580**
High School	**$16,128**

TABLE 7
Facilities Cost Impact Per Seat/Student for New Construction

School Level	Facilities Cost Impact per Seat/Student (New Construction)
Elementary School	**$49,583**
Junior High School	**$49,583**

SECTION III. PROJECTED IMPACT OF RESIDENTIAL DEVELOPMENT

The following sections present the school facility impact analysis for new residential development and provide step-by-step calculations of the estimated per residential square foot cost impact.

To determine the school facilities cost impact per square foot of residential development, first the facilities costs for modernization attributable to Unmitigated Projected Units is determined. Since the Preserve Area Projected Enrollment is expected to require the new construction of facilities at the Elementary School and Junior High School levels, for the purposes of this analysis and determination of the appropriate modernization cost estimates, the Preserve Area Projected Enrollment is deducted from the Projected Unhoused Students at the Elementary School and Junior High School levels, resulting the Adjusted Projected Unhoused Students. The Adjusted Projected Unhoused Students are multiplied by the Facilities Cost Impact per Seat/Student (Modernization) determined in Table 6; the result of this computation is shown in Table 8 and reflects the estimated modernization school facilities cost impact to house Adjusted Projected Unhoused Students.

TABLE 8
Modernization Facilities Cost Impact

School Level	Facilities Cost Impact per Seat/Student	Adjusted Projected Unhoused Students	Modernization Facilities Cost Impact Attributable to Unmitigated Projected Units
Elementary School	$25,323	1,007	$25,500,261
Junior High School	$21,580	280	$6,042,400
High School	$16,128	1,059	$17,079,552
Total			**$48,622,213**

As described in Section II. C, the construction of new classroom facilities is required to accommodate Preserve Area Projected Enrollment at the elementary and junior high school levels. The Preserve Area Projected Enrollment is multiplied by the Facilities Cost Impact per Seat/Student (New Construction) determined in Table 7; the result of this computation is shown in Table 9 and reflects the estimate new construction school facilities cost impact to house Preserve Area Projected Enrollment.

TABLE 9
New Construction Facilities Cost Impact

School Level	Facilities Cost Impact per Seat/Student	Preserve Area Projected Enrollment	New Construction Facilities Cost Impact Attributable to Preserve Area (Unmitigated) Projected Units
Elementary School	$49,583	731	$36,245,173
Junior High School	$49,583	191	$9,470,353
Total			**$45,715,526**

The total school facilities impact is the sum of the Modernization Facilities Cost Impact determined in Table 8 and the New Construction Facilities Cost Impact determined in Table 9. The result is shown in Table 10

TABLE 10
Total School Facilities Cost Impact

Modernization Facilities Cost Impact	New Construction Facilities Cost Impact	Total Facilities Cost Impact
$48,622,213	$45,715,526	**$94,337,739**

The total school facilities impact shown in Table 10 above was then divided by the number of Unmitigated Projected Units shown in Table 2 to determine the school facilities cost per residential unit. The cost per residential unit is shown in Table 11.

TABLE 11
School Facilities Cost per Residential Unit

Total Facilities Cost Impact	Unmitigated Projected Units	Facilities Cost Impact per Residential Unit
$94,337,739	7,741	**$12,187**

The school facilities cost impact per residential square foot is calculated by dividing the school facilities cost per residential unit determined in Table 11 by the weighted average square footage of each residential unit type. This calculation is shown in Table 12. The weighted average square footage square footage of the Unmitigated Projected Units is estimated based on square footage information from recent development projects constructed within the School District and in the San Bernardino County and the Cities of Chino Hills, Chino and Ontario.

TABLE 12
School Facilities Cost per Residential Square Foot

Facilities Cost Impact per Residential Unit	Weighted Average Square Footage	Facilities Cost per Residential Square Foot
$12,187	1,716	**$7.10**

The school facilities impact per residential square foot determined in Table 12 is greater than the School District's share of the current maximum authorized residential School Fees of $5.17 per square foot; therefore, the School District is justified in levying up to but not exceeding the maximum authorized amount for residential construction and reconstruction.

SECTION IV. COMMERCIAL/INDUSTRIAL SCHOOL IMPACT ANALYSIS

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

A. EMPLOYEE GENERATION

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

The employee generation estimates per 1,000 square feet of development derived from the Traffic Study are listed by commercial/industrial land use category in Table 13. The land use categories listed are based on those categories described in the Traffic Study and include all land uses recommended by the provisions of Education Code Section 17621(e)(1)(B).

TABLE 13
Employee Generation per 1,000 Square Feet of Commercial/Industrial Development

Commercial/Industrial Category	Average Square Footage per Employee	Employees Per 1,000 Square Feet
Banks	354	2.8253
Community Shopping Center	652	1.5348
Neighborhood Shopping Center	357	2.7985
Industrial Business Parks	284	3.5156
Industrial Parks/Warehousing/Manufacturing	742	1.3473
Rental Self-Storage	15,541	0.0643
Research & Development	329	3.0408
Hospitality (Lodging)	883	1.1325
Commercial Offices (Standard)	209	4.7897
Commercial Offices (Large High Rise)	220	4.5442
Corporate Offices	372	2.6848
Medical Offices	234	4.2654

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

B. RESIDENTIAL IMPACT

1. Households

To evaluate the impact of commercial/industrial development on School District facilities, the employee generation estimates listed in Table 13 were first used to determine the impact of commercial/industrial development on a per household basis. Based on information derived from U.S. Census Bureau data[9], there are approximately 1.55 employed persons per household on average for households located within the School District. Dividing the employee generation estimates listed in Table 13 by 1.55 results in the estimated number of households per 1,000 square feet of commercial/industrial development ("Total Household Impact").

The Total Household Impact determined in the preceding paragraph takes into consideration all employees generated from commercial/industrial development. Since some of those employees will live outside the School District and will therefore have no impact on the School District, the figures are adjusted to reflect only those households within the School District occupied by employees generated from commercial/industrial development built within the School District. Based on information derived from U.S. Census Bureau data[10], it is estimated that approximately twenty-four and seven-tenths percent (24.70%) of employees both live and work within the School District. Multiplying the Total Household Impact by twenty-four and seven-tenths percent (24.70%) results in the households within the School District impacted per 1,000 square feet commercial/industrial development. The results of these computations are shown in Table 14.

TABLE 14
Impact of Commercial/Industrial Development on Households within the School District

Commercial/Industrial Category	School District Households per 1,000 Square Feet Com./Ind.
Banks	0.4502
Community Shopping Center	0.2446
Neighborhood Shopping Center	0.4460
Industrial Business Parks	0.5602
Industrial Parks/Warehousing/Manufacturing	0.2147
Rental Self-Storage	0.0103
Research & Development	0.4846
Hospitality (Lodging)	0.1805
Commercial Offices (Standard)	0.7633
Commercial Offices (Large High Rise)	0.7241
Corporate Offices	0.4278
Medical Offices	0.6797

[9] 2022 American Community Survey 5-Year Estimates; DP04-Selected Housing; DP03-Economic Characteristics (Civilian Employed).
[10] 2022 American Community Survey 5-Year Estimates; S0801-Commuting Characteristics (Work in place of residence).

2. Household Student Generation

The student generation impacts per 1,000 square feet of commercial/industrial development were calculated by multiplying the household impacts shown in Table 14 by blended student generation rates determined for each school level. The result of this calculation is shown in Table 15. The determination of student generation rates are shown and described in Appendix "D" of this Study.

TABLE 15
Student Generation per 1,000 Square Feet of Commercial/Industrial Development

Commercial/Industrial Category	Elementary School Student Generation	Junior High School Student Generation	High School Student Generation	Total Student Generation
Banks	0.1011	0.0274	0.0616	0.1901
Community Shopping Center	0.0549	0.0149	0.0335	0.1033
Neighborhood Shopping Center	0.1002	0.0271	0.0610	0.1883
Industrial Business Parks	0.1258	0.0341	0.0766	0.2365
Industrial Parks/Warehousing/ Manufacturing	0.0482	0.0131	0.0294	0.0907
Rental Self-Storage	0.0023	0.0006	0.0014	0.0043
Research & Development	0.1088	0.0295	0.0663	0.2046
Hospitality (Lodging)	0.0405	0.0110	0.0247	0.0762
Commercial Offices (Standard)	0.1714	0.0464	0.1044	0.3222
Commercial Offices (Large High Rise)	0.1626	0.0440	0.0991	0.3057
Corporate Offices	0.0961	0.0260	0.0585	0.1806
Medical Offices	0.1527	0.0413	0.0930	0.2870

3. Inter-District Student Impact

Based on information provided by the School District, 646 students were enrolled at the School District on an inter-district basis as of October 2023, including 322 students at the elementary school level, 40 students at the junior high school level and 284 students at the high school level. Many of those inter-district students attend the School District as a result of their parents or guardians being employed at businesses located within the School District boundaries. To determine the inter-district impact of new commercial/industrial development, the number of inter-district students at each school level was first divided by the estimated number of employees within the School District's area. Employment was estimated at 92,471[11] based on date obtained from the U.S. Census Bureau. The ratio of inter-district students to estimated employment for each school level was then multiplied by the employee generation factors for each of the commercial/industrial categories as shown in Table 13. The calculation results in the Inter-District Student Impacts shown in Table 16.

[11] 2020 American Community Survey 5-Year Estimates; DP03-Economic Characteristics (Civilian Employed).

TABLE 16
Inter-District Cost Impact per 1,000 Square Feet of Commercial/Industrial Development

Commercial/Industrial Category	Elementary School Cost Impact	Junior High School Cost Impact	High School Cost Impact	Total Inter-District Cost Impact
Banks	0.0099	0.0011	0.0088	0.0198
Community Shopping Center	0.0054	0.0006	0.0048	0.0107
Neighborhood Shopping Center	0.0098	0.0011	0.0087	0.0196
Industrial Business Parks	0.0123	0.0014	0.0109	0.0246
Industrial Parks/Warehousing/Manufacturing	0.0047	0.0005	0.0042	0.0094
Rental Self-Storage	0.0002	0.0000	0.0002	0.0005
Research & Development	0.0106	0.0012	0.0094	0.0213
Hospitality (Lodging)	0.0040	0.0005	0.0035	0.0079
Commercial Offices (Standard)	0.0168	0.0019	0.0148	0.0335
Commercial Offices (Large High Rise)	0.0159	0.0018	0.0141	0.0318
Corporate Offices	0.0094	0.0011	0.0083	0.0188
Medical Offices	0.0149	0.0017	0.0132	0.0299

4. Total Student Generation Impact

The Total Student Generation Impact is determined by adding the Student Generation Impacts shown in Table 15 to the Inter-District Impacts determined in Table 16. The Total Student Generation Impacts are listed in Table 17.

TABLE 17
Total Student Generation Impact per 1,000 Square Feet of Commercial/Industrial Development

Commercial/Industrial Category	Elementary School Cost Impact	Junior High School Cost Impact	High School Cost Impact	Total Student Generation Cost Impact
Banks	0.1110	0.0285	0.0704	0.2099
Community Shopping Center	0.0603	0.0155	0.0383	0.1140
Neighborhood Shopping Center	0.1100	0.0282	0.0697	0.2079
Industrial Business Parks	0.1381	0.0355	0.0875	0.2611
Industrial Parks/Warehousing/Manufacturing	0.0529	0.0136	0.0336	0.1001
Rental Self-Storage	0.0025	0.0006	0.0016	0.0048
Research & Development	0.1194	0.0307	0.0757	0.2259
Hospitality (Lodging)	0.0445	0.0115	0.0282	0.0841
Commercial Offices (Standard)	0.1882	0.0483	0.1192	0.3557
Commercial Offices (Large High Rise)	0.1785	0.0458	0.1132	0.3375
Corporate Offices	0.1055	0.0271	0.0668	0.1994
Medical Offices	0.1676	0.0430	0.1062	0.3169

C. NET IMPACT PER COMMERCIAL/INDUSTRIAL SQUARE FOOT

1. Cost Impact

To estimate the school facilities costs required to house new students as a result of additional commercial/industrial development, a blended Facilities Cost Impact per Seat/Student, as determined by the Facilities Cost Impacts per Seat/Student shown in Tables 6 and 7[12], is multiplied by the household impacts calculated in Table 17, resulting in the total school facilities cost impact per 1,000 square feet of commercial/industrial development. The total school facilities cost impacts are shown in Table 18 by commercial/industrial development category.

TABLE 18
School Facilities Costs per 1,000 Square Feet of Commercial/Industrial Development

Commercial/Industrial Category	Elementary School Cost Impact	Junior High School Cost Impact	High School Cost Impact	Total School Facilities Cost Impact
Banks	$3,943	$940	$1,135	$6,017
Community Shopping Center	$2,141	$511	$617	$3,269
Neighborhood Shopping Center	$3,908	$929	$1,124	$5,961
Industrial Business Parks	$4,906	$1,169	$1,411	$7,487
Industrial Parks/ Warehousing/Manufacturing	$1,880	$449	$542	$2,871
Rental Self-Storage	$90	$21	$26	$136
Research & Development	$4,243	$1,012	$1,221	$6,476
Hospitality (Lodging)	$1,580	$377	$455	$2,412
Commercial Offices (Standard)	$6,685	$1,591	$1,923	$10,199
Commercial Offices (Large High Rise)	$6,342	$1,509	$1,825	$9,676
Corporate Offices	$3,748	$892	$1,078	$5,717
Medical Offices	$5,955	$1,416	$1,713	$9,085

2. Residential Fee Offsets

The total cost impacts determined in Table 18 represent the amounts required to fully mitigate the impact on school facilities, as a result of new commercial/industrial development within the School District. Many employees as a result of new commercial/industrial development will commute from areas outside of the School District boundaries or will reside in existing homes, from which no mitigation will be received from the housing in which they reside. However, new commercial/industrial development, and thereby new employee generation, will also increase the need for new residential development to house those employees living in the School District. Applicable Residential School Fees adopted by the School District under applicable law will also be imposed by the School District on such new residential development. To prevent new commercial/industrial development from paying the portion of impact that is mitigated by the Applicable Residential School Fees, this amount has been calculated

[12] The Facilities Cost Impacts Per Seat/Student are blended based on the proportionate Preserve Area Projected Enrollment and Adjusted Projected Unhoused Students.

and deducted from the school facilities impact costs calculated in Table 18.

The residential fee offsets are first calculated by using the Applicable Residential School Fee of $5.17 per square foot and multiplying that amount by the weighted average square footage of a residential unit in the School District, which is 1,716 square feet. This calculation provides the average residential revenues from a residential unit of $8,872 ($5.17 x 1,716). The average residential revenues from a residential unit multiplied by the Household Impacts per 1,000 square feet of commercial/industrial development, as shown in Table 14, results in the residential school fee revenues per 1,000 square feet of commercial/industrial development ("Residential Fee Offset"). This computation is shown in Table 19.

TABLE 19
Residential Fee Offsets

Commercial/Industrial Category	School District Households per 1,000 Square Feet Com./Ind.	Residential Fee per Unit	Residential Fee Offset per 1,000 Square Feet Com./Ind.
Banks	0.4502	$8,872	$3,994
Community Shopping Center	0.2446	$8,872	$2,170
Neighborhood Shopping Center	0.4460	$8,872	$3,957
Industrial Business Parks	0.5602	$8,872	$4,970
Industrial Parks/ Warehousing/Manufacturing	0.2147	$8,872	$1,905
Rental Self-Storage	0.0103	$8,872	$91
Research & Development	0.4846	$8,872	$4,299
Hospitality (Lodging)	0.1805	$8,872	$1,601
Commercial Offices (Standard)	0.7633	$8,872	$6,772
Commercial Offices (Large High Rise)	0.7241	$8,872	$6,424
Corporate Offices	0.4278	$8,872	$3,795
Medical Offices	0.6797	$8,872	$6,030

3. Net School Facilities Costs

Subtracting the Residential Fee Offset determined in Table 19 from the total school facilities costs listed in Table 18 results in the net school facilities costs per 1,000 square feet of commercial/industrial development ("Net School Facilities Costs"). The Net School Facilities Costs are listed in Table 20.

TABLE 20
Net School Facilities Costs Per 1,000 Square Feet Commercial/Industrial Development

Commercial/Industrial Category	Total School Facilities Cost Impact	Residential Fee Offset	Net School Facilities Cost Impact
Banks	$6,017	$3,994	$2,023
Community Shopping Center	$3,269	$2,170	$1,099

Commercial/Industrial Category	Total School Facilities Cost Impact	Residential Fee Offset	Net School Facilities Cost Impact
Neighborhood Shopping Center	$5,961	$3,957	$2,004
Industrial Business Parks	$7,487	$4,970	$2,517
Industrial Parks/ Warehousing/Manufacturing	$2,871	$1,905	$966
Rental Self-Storage	$136	$91	$45
Research & Development	$6,476	$4,299	$2,177
Hospitality (Lodging)	$2,412	$1,601	$811
Commercial Offices (Standard)	$10,199	$6,772	$3,427
Commercial Offices (Large High Rise)	$9,676	$6,424	$3,252
Corporate Offices	$5,717	$3,795	$1,922
Medical Offices	$9,085	$6,030	$3,055

The Net School Facilities Cost Impacts determined in Table 20 were then divided by 1,000[13] to provide the cost impact on a square foot basis. These cost impacts are listed in Table 21.

TABLE 21
Net School Facilities Cost Impacts Per Square Foot of Commercial/Industrial Development

Commercial/Industrial Category	Net School Facilities Cost Impacts per Square Foot
Banks	**$2.02**
Community Shopping Center	**$1.10**
Neighborhood Shopping Center	**$2.00**
Industrial Business Parks	**$2.52**
Industrial Parks/ Warehousing/Manufacturing	**$0.97**
Rental Self-Storage	**$0.05**
Research & Development	**$2.18**
Hospitality (Lodging)	**$0.81**
Commercial Offices (Standard)	**$3.43**
Commercial Offices (Large High Rise)	**$3.25**
Corporate Offices	**$1.92**
Medical Offices	**$3.05**

The net school facilities cost impacts per commercial/industrial square shown in Table 21 are equal to or exceed the maximum authorized statutory school fee for commercial/industrial development of $0.84 per square foot, except for the categories of Rental Self-storage and Hospitality (Lodging). Therefore, the School District is justified in levying school fees on commercial/industrial development in an amount up to but not

[13] The Employee Generation Rates derived from the SANDAG Traffic Study are estimated per 1,000 square feet of development.

exceeding the maximum authorized statutory fee, or the net cost impacts determined for the categories of Rental Self-storage and Hospitality (Lodging).

D. COMMERCIAL/INDUSTRIAL DEVELOPMENT NOT IN PRESCRIBED CATEGORIES

In cases where new commercial/industrial development does not fit within the prescribed categories shown in Table 13, the School District shall evaluate such development on a case-by-case basis to determine if the imposition of the School Fees on the development meets the essential nexus requirements set forth under Government Code Section 66000 et seq. The School District may levy School Fees on such development in an amount up to but not exceeding the cost per square foot impact determined through such evaluation.

E. AGE-RESTRICTED (SENIOR) HOUSING

The School District must exercise discretion in determining whether a particular project qualifies as "senior citizen housing" for the purpose of imposing developer fees. (See California Ranch Homes Development Co. v. San Jacinto Unified School Dist. (1993) 17 Cal.App.4th 573, 580–581.) The School District acknowledges Section 65995.1 and will levy its share of School Fees on qualifying senior citizen housing projects at the current commercial/industrial rate of $0.84 per square foot as justified herein. The School District will require proof that such senior units are indeed restricted to seniors (i.e. a copy of the recorded CC&Rs or deed(s)) and reserves the right to revoke a Certificate of Compliance and/or require payment of difference of the amount per square foot paid to the then current amount of School Fees being levied on residential development per square foot should such Covenants, Conditions, and Restrictions ("CC&Rs") or deed(s) be modified to allow students to reside in such the housing units. If there is any uncertainty as to whether a project qualifies as senior citizen housing or will, in fact, remain senior citizen housing beyond initial approval, the School district may wish to seek cooperation from the developer as a condition of levying the commercial/industrial School Fee rate. Such cooperation could take the form of an agreement by the developer to include a restriction in the recorded CC&Rs conditioning subsequent changes in residency requirements on the owner's payment of applicable developer fees, and to notify the School District of changes in residency requirements and/or to provide current residency data upon School District's request.

SECTION V. REDEVELOPMENT

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

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

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

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

SECTION VI. GOVERNMENT CODE SECTION 66000

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

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

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

Purpose of the School Fee

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

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

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

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

Identify the Use of the School Fee

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

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

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

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

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

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

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

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

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

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

The imposition of the Applicable Residential School Fee of $5.17 per square foot of residential development is justified as the fee is equal to or below the per square foot cost impacts to provide adequate school facilities required as a result of such new residential development.

Similarly, the imposition of the Applicable Com/Ind. School Fees of $0.84 per square foot of commercial/industrial development is justified as the fee is equal to or below the estimated per square foot net cost impact to provide adequate school facilities required as a result of such new commercial/industrial development, except for of Rental Self-Storage where School Fees of $0.05 per square foot are justified, and Hospitality (Lodging) where School Fees of $0.81 per square foot are justified.

Accounting Procedures for the Fees

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

APPENDIX A
COMMERCIAL/INDUSTRIAL DEVELOPMENT DESCRIPTIONS

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

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

APPENDIX B
FACILITIES CAPACITY UPDATE

TABLE B-1
Classroom Inventory

Site Name	Portable Classrooms	Permanent Classrooms	Total Classrooms	Special Use Classrooms	General Education Classrooms
Elementary School (TK-6) Totals	274	566	840	153	687
Junior High School (7-8) Totals	64	194	258	35	223
High School (9-12) Totals	103	387	490	54	436
Total (tK-12)	**441**	**1,147**	**1,588**	**242**	**1,346**

TABLE B-2
Building Capacity
(In accordance with California Code of Regulation, Title II, Section 1859.35)

	General Education			Special Use		
Description	TK-6	7-8	9-12	Non Severe	Severe	Total
I. Total Classroom Inventory	687	223	436	239	3	1,588
II. Permanent Classrooms						1,147
III. Portable Classrooms						441
IV. 25% of Permanent Classrooms						287
V. Adjustment (III. Minus IV.)	79	19	32	24	0	154
IV. Total (I. minus V.)	608	204	404	215	3	1,434
Building Capacity[1]	**15,200**	**5,508**	**10,908**	**2,795**	**27**	**34,438**

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

TABLE B-3
Building Capacity by School Levels

Description	TK-6	7-8	9-12	Total
General Education	15,200	5,508	10,908	31,616
Proration of Non Severe Capacity	1,344	487	964	2,795
Proration of Severe Capacity	13	5	9	27
Total	**16,557**	**6,000**	**11,881**	**34,438**

APPENDIX C
ENROLLMENT SUMMARY

Enrollment															
	School Level/Grade														
	Elementary								Junior High		High				
School Name/Program	TK	K	1	2	3	4	5	6	7	8	9	10	11	12	Total
Alicia Cortez Elementary School	-	52	63	63	70	67	70	79	-	-	-	-	-	-	464
Anna Borba Fundamental School	-	64	41	35	45	52	53	43	-	-	-	-	-	-	333
Butterfield Ranch Elementary School	22	76	87	84	72	93	84	103	-	-	-	-	-	-	621
Cal Aero Preserve Academy Elementary	-	153	194	202	193	176	186	216	-	-	-	-	-	-	1,320
Chaparral Elementary School	48	73	76	69	75	106	81	95	-	-	-	-	-	-	623
Country Springs Elementary School	-	48	88	69	93	85	88	84	-	-	-	-	-	-	555
Doris Dickson Elementary	24	56	83	85	66	76	88	80	-	-	-	-	-	-	558
Eagle Canyon Elementary School	-	65	84	99	99	91	93	98	-	-	-	-	-	-	629
Edwin Rhodes Elementary School	-	91	130	127	127	121	132	114	-	-	-	-	-	-	842
EJ Marshall Elementary School	-	68	69	67	55	69	53	53	-	-	-	-	-	-	434
Gerald F Litel Elementary School	-	54	72	85	91	82	86	79	-	-	-	-	-	-	549
Glenmeade Elementary School	46	66	40	66	41	54	54	57	-	-	-	-	-	-	424
Hidden Trails Elementary School	-	90	104	68	64	71	61	63	-	-	-	-	-	-	521
Howard Cattle Elementary School	48	77	65	92	77	76	75	67	-	-	-	-	-	-	577
Levi Dickey Elementary School	-	58	59	59	64	62	57	61	-	-	-	-	-	-	420
Liberty Elementary School	46	62	76	79	77	67	80	78	-	-	-	-	-	-	565
Lyle S Briggs Fundamental Elementary	-	52	68	48	61	66	88	78	-	-	-	-	-	-	461
Newman Elementary School	-	50	65	69	63	74	78	74	-	-	-	-	-	-	473
Oak Ridge Elementary School	-	62	69	76	77	76	91	92	-	-	-	-	-	-	543
Rolling Ridge Elementary School	-	74	81	78	91	83	83	87	-	-	-	-	-	-	577
Walnut Avenue Elementary School	49	45	68	62	58	75	61	64	-	-	-	-	-	-	482
Wickman Elementary School	-	69	79	113	94	114	132	118	-	-	-	-	-	-	719
Cal Aero Preserve Academy Junior High	-	-	-	-	-	-	-	-	205	194	-	-	-	-	399
Canyon Hills Junior High School	-	-	-	-	-	-	-	-	489	518	-	-	-	-	1,007
Lyle S Briggs Fundamental Junior High	-	-	-	-	-	-	-	-	99	95	-	-	-	-	194
Magnolia Junior High School	-	-	-	-	-	-	-	-	282	295	-	-	-	-	577
Ramona Junior High School	-	-	-	-	-	-	-	-	218	235	-	-	-	-	453
Townsend Junior High School	-	-	-	-	-	-	-	-	443	433	-	-	-	-	876
Woodcrest Junior High School	-	-	-	-	-	-	-	-	175	180	-	-	-	-	355
Buena Vista High School	-	-	-	-	-	-	-	-	-	-		1	28	140	169
Chino High School	-	-	-	-	-	-	-	-	-	-	552	516	439	502	2,009
Chino Hills High School	-	-	-	-	-	-	-	-	-	-	641	720	768	638	2,767
Don Antonio Lugo High School	-	-	-	-	-	-	-	-	-	-	308	321	355	408	1,392
Ruben S Ayala High School	-	-	-	-	-	-	-	-	-	-	612	623	672	622	2,529
Grand Total	**283**	**1,505**	**1,761**	**1,795**	**1,753**	**1,836**	**1,874**	**1,883**	**1,911**	**1,950**	**2,113**	**2,181**	**2,262**	**2,310**	**25,417**
Enrollment by School Level								**12,690**		**3,861**				**8,866**	**25,417**

Source: School District

APPENDIX D
STUDENT GENERATION RATES

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

The student enrollment address information was matched to the address (situs) information from the property characteristic/GIS data. The number of students matched was then queried by school level and residential category. Students could not be matched if they were inter-district or if they did not have a valid physical address (e.g. only P.O. Box was listed). Mobile homes are not considered in the SGR determination, and therefore have been omitted. The determination of the SGRs is summarized in Tables D-1 through D-4. Some areas of the School District generate students at higher rates than others, so the below generation rates are estimates to be supplemented as needed by demographic data for facilities planning purposes.

TABLE D-1
Student Generation Rates

School Level	SFD Units	SFA Units	MF Units
Elementary School (TK-6)	0.2090	0.3603	0.1525
Junior High School (7-8)	0.0661	0.0792	0.0447
High School (9-12)	0.1523	0.1865	0.0920
Total	**0.4274**	**0.6260**	**0.2892**

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

School Level	No. of Students Matched	Total Units[1]	Student Generation Rate
Elementary School (TK-6)	9,081	43,452	0.2090
Junior High School (7-8)	2,872	43,452	0.0661
High School (9-12)	6,618	43,452	0.1523
Total	**18,571**	**NA**	**0.4274**

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

School Level	No. of Students Matched	Total Units[1]	Student Generation Rate
Elementary School (TK-6)	1,401	3,888	0.3603
Junior High School (7-8)	308	3,888	0.0792
High School (9-12)	725	3,888	0.1865
Total	**2,434**	**NA**	**0.6260**

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

School Level	No. of Students Matched	Total Units[1]	Student Generation Rate
Elementary School (TK-6)	1,592	10,440	0.1525
Junior High School (7-8)	467	10,440	0.0447
High School (9-12)	960	10,440	0.0920
Total	**3,019**	**NA**	**0.2892**

[1] Obtained from the U.S. Census Bureau's 2020 American Community Survey 5-Year Estimates

The student generation rates for each residential category listed in Table D-1 were blended into a single student generation rate for each school level based on the percentage allocation of Projected Units. The percentage allocations are shown in Table D-5.

TABLE D-5
Allocation of Net Projected Units by Residential Category

Residential Category	Net Projected Units	Percentage Allocation
SFD	2,685	34.7%
SFA	1,955	25.3%
MF	3,101	40.1%
Total	**7,741**	**100.0%**

The Blended Student Generation Rates were determined by applying the percentage allocations, in Table D-5 by the Student Generation Rates shown in Table D-1, the results of which are shown in Table D-6.

TABLE D-6
Blended Student Generation Rates

School Level	Blended Student Generation Rate
Elementary School (TK-6)	0.2246
Junior High School (7-8)	0.0608
High School (9-12)	0.1368
Total	**0.4222**

APPENDIX E
FACILITIES COSTS ESTIMATES

TABLE E-1
Estimated Modernization Costs

School Site	Modernization Eligibility Year [1]	Site Facilities Total Square Footage [1]	Estimated Costs 2024 Dollars [2]	Classroom Counts [3]	Estimated Capacity [4]	Estimated Cost Per Seat [6]
Elementary School						
Cal Aero Academy TK-8 (Elementary Allocation) [6]	2031	81,000	$16,574,155	-	1,161	
Chaparral Elementary	2030	52,118	$22,495,692	33	825	
Edwin Rhodes Elementary	2028	52,118	$22,495,692	33	825	
Liberty Elementary	2029	66,331	$28,630,450	36	900	
Wickman Elementary	2028	54,218	$23,402,115	31	775	
Subtotal	NA	NA	**$113,598,105**	NA	**4,486**	**$25,323**
Junior High School						
Cal Aero Academy TK-8 (Jr. High Allocation) [6]	2031	81,000	$5,009,915	-	351	
Woodcrest Junior High	2030	88,343	$23,540,759	36	972	
Subtotal	NA	NA	**$28,550,674**	NA	**1,323**	**$21,580**
High School						
Chino Hills High School	2026	234,173	**$49,642,334**	114	3,078	
Subtotal	NA	NA	**$49,642,334**	NA	**3,078**	**$16,128**
Total Estimated Modernization	NA	NA	**$191,791,113**	NA	**8,887**	**$21,581**

[1] Source: draft Facilities Master Plan Update; March 2024.

[2] Estimated based on actual costs per square foot experienced by the School District for schoolwide modernization, which amount to $431.63 per square foot at the elementary school level, $266.47 at the junior high school level, and $211.99 at the high school level in 2024 dollars.

[3] Source: School District Classroom inventory.

[4] School capacities are determined based on loading factors of 25 pupils per classroom for grades TK through 6, and 27 pupils per classroom for grades 7 through 12 (California Code of Regulation, Title II, Section 1859.35.)

[5] Calculated as the Estimated Costs Adjusted to Modernization Eligibility Year divided by Estimated Capacity.

[6] Allocated based on October 2023 enrollment (grades TK-6 classified as Elementary, and grades 7-8 classified as Junior High)

APPENDIX E
FACILITIES COSTS ESTIMATES

TABLE E-2
Estimated New Construction Costs

School Site	Land Acquisition [1]	Estimated Construction[1]	Total Estimated Costs[1]	Design Capacity [1] [2]	Estimated Cost per Seat
New Preserve TK-8 (Legacy)	$39,500,000	$20,000,000	$59,500,000	1,200	**$49,583**

[1] Source: School District.
[2] Capacity is based on the school site operating on a continuous multi-track year-round schedule.