



## **STAFF REPORT**

**TO:** Board President and Trustees

**FROM:** Martin Rodriguez, Chief Business Official

**DATE:** November 5, 2018

**SUBJECT:** Public Hearing – School Facilities Needs Analysis (D)

**Recommendation:**

Cooperative Strategies has completed a study for the District regarding future growth and facility cost related to growth. The report shows that the District should adjust the Level 2 Developer Fees from \$6.40 to \$6.35 per square foot. Open Hearing at:\_\_\_\_\_p.m. Close Hearing at:\_\_\_\_\_p.m.

**Discussion:**

Annual Adoption of Level 2 Developer Fees collected from Residential Development in school district boundaries.

**Fiscal Impact:**

No fiscal (expense) impact to district.

**Follow-up for Staff:**

No follow up action for this item.

**Attachments:**

School Facilities Needs Analysis Report November 2018.



**COOPERATIVE**  
**STRATEGIES**

COMPLETE FINANCIAL & DEMOGRAPHIC PLANNING FOR EDUCATION

**RICHLAND SCHOOL DISTRICT**

**SCHOOL FACILITIES NEEDS ANALYSIS**

**MAY 22, 2018**

**PREPARED FOR:**

**Richland**

**School District**

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## EXHIBITS

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

## EXECUTIVE SUMMARY

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

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

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

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

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

### B. Compliance with Statutory Requirements

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

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

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

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

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

**Table ES-2**  
**Alternative Fees (2018\$)**

<b>Fee</b>	<b>Amount per Square Foot</b>
Alternative No. 2 Fee	\$6.35
Alternative No. 3 Fee	\$12.70

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

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

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

Should the Governing Board of the School District approve the resolution that adopts the Analysis and the accompanying Alternative No. 2 Fee and Alternative No. 3 Fee, those amounts would be effective immediately for a period not to exceed 12 months. By approving the Analysis and the accompanying Alternative Fees, the Governing Board is authorizing the imposition of the Alternative No. 2 Fee for those periods when the State has new construction bond funds available and the Alternative No. 3 Fee for those periods when the SAB is no longer approving apportionments for new construction due to a lack of funds available and the conditions in Section 65995.7 have been met.

## I. GENERAL

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

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

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

## **Eligibility to Collect Alternative Fees**

### Eligibility to Receive State Funds

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

### Statutory Requirements

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

1. A school district has a substantial enrollment, as defined in Section 65995.5(b)(3)(A) ("Substantial Enrollment") of its students on a multi-track year-round calendar;
2. A school district has placed at least one (1) GO bond measure on the ballot in the last four (4) years, and the measure received at least 50 percent plus one (1) of the votes cast;
3. A school district has issued debt or incurred obligations for capital outlay in an amount equivalent to a certain percentage of its bonding capacity; and/or
4. At least 20 percent of the teaching stations within a school district are relocatable classrooms.

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

### Total Projected Student Enrollment

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

### Excess Capacity

A school district must identify and consider the number of excess seats, if any, which are available at each school level (i.e., elementary school and middle school). If surplus seats exist at one (1) or more school levels, the school district must



determine what portion of the excess seats, if any, should be made available to accommodate the Projected Student Enrollment. The determination may include such considerations as matriculation of existing students, advance funding from mitigated future residential units, long term needs of the school district, as well as other relevant factors. Excess seats shall be determined by comparing capacity as calculated pursuant to Section 17071.25 of the Education Code to student enrollment.

#### Projected Unhoused Students

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

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

#### Surplus Property

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

#### Existing Surplus Local Funds

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

### **Alternative No. 2 Fee**

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

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

### Site Acquisition and Site Development Costs

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

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

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

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

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

### Alternative No. 2 Fee

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

## **Alternative No. 3 Fee**

### Alternative No. 3 Fee

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

## **II. ELIGIBILITY TO COLLECT ALTERNATIVE FEES**

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

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

The School District has taken action electing to participate in the SFP established by Section 17070.10 of the Education Code. Additionally, the School District authorized a designated representative to (i) approve, certify, and submit the SAB Forms 50-01, 50-02, and 50-03 to the SAB and (ii) request an Eligibility Determination for new construction funding as required by the SFP. The School District filed SAB Forms 50-01, 50-02, and 50-03 and requested an Eligibility Determination for new construction funding as required by the SFP on December 31, 2001. On January 22, 2003, the Eligibility Determination of the School District was approved by the SAB. Subsequently, the School District submitted updated SAB Forms 50-01, 50-02, and 50-03 as part of its ongoing facilities planning and financing program. The most current SAB Forms 50-01, 50-02, and 50-03 are incorporated herein as Exhibits A, B, and C, respectively. As shown in the School District's most current Eligibility Determination from the SAB (attached and incorporated as Exhibit D), the School District is eligible for new construction funding under the SFP for zero (0) students in grades kindergarten through 6, 173 students in grades 7 and 8, 28 non-severe special day class students, and zero (0) severe special day class students.

### **B. Statutory Requirements**

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

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

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

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

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

**2. General Obligation Bond Measure**

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

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

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

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



**The School District has determined that this Statutory Requirement has been satisfied. The School District currently has \$14,420,895 in outstanding debt. This debt represents 70.40 percent of the School District's bonding capacity (see Exhibit F for a calculation of the School District's bonding capacity).**

**4. Relocatable Classrooms**

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

**The School District has determined that this Statutory Requirement has been satisfied. The School District currently has a total of 112 permanent classrooms and 59 relocatable classrooms. This equates to a 34.50 percent relocatable classroom utilization rate.**

**C. Eligibility to Collect Alternative Fees**

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

### **III. PROJECTED UNHOUSED STUDENTS FROM RESIDENTIAL DEVELOPMENT OVER THE NEXT FIVE YEARS**

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

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

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

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

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

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

A total of 205 SFD units in the School District were identified as meeting the criteria stated above. Cooperative Strategies then obtained a database of all students within the School District at the beginning of school year 2017/2018. Upon comparison of the two (2) databases, 176 students were matched to the 205 SFD units, resulting in the following SGRs for SFD units shown in Table 1.

**Table 1**  
**Student Generation Rates for Single Family Detached Units**

<b>School Level</b>	<b>Number of Students Matched</b>	<b>Number of SFD Units</b>	<b>Student Generation Rates</b>
Elementary School (Grades K-6)	135	205	0.6585
Middle School (Grades 7-8)	41	205	0.2000
<b>Total</b>	<b>176</b>	<b>N/A</b>	<b>0.8585</b>

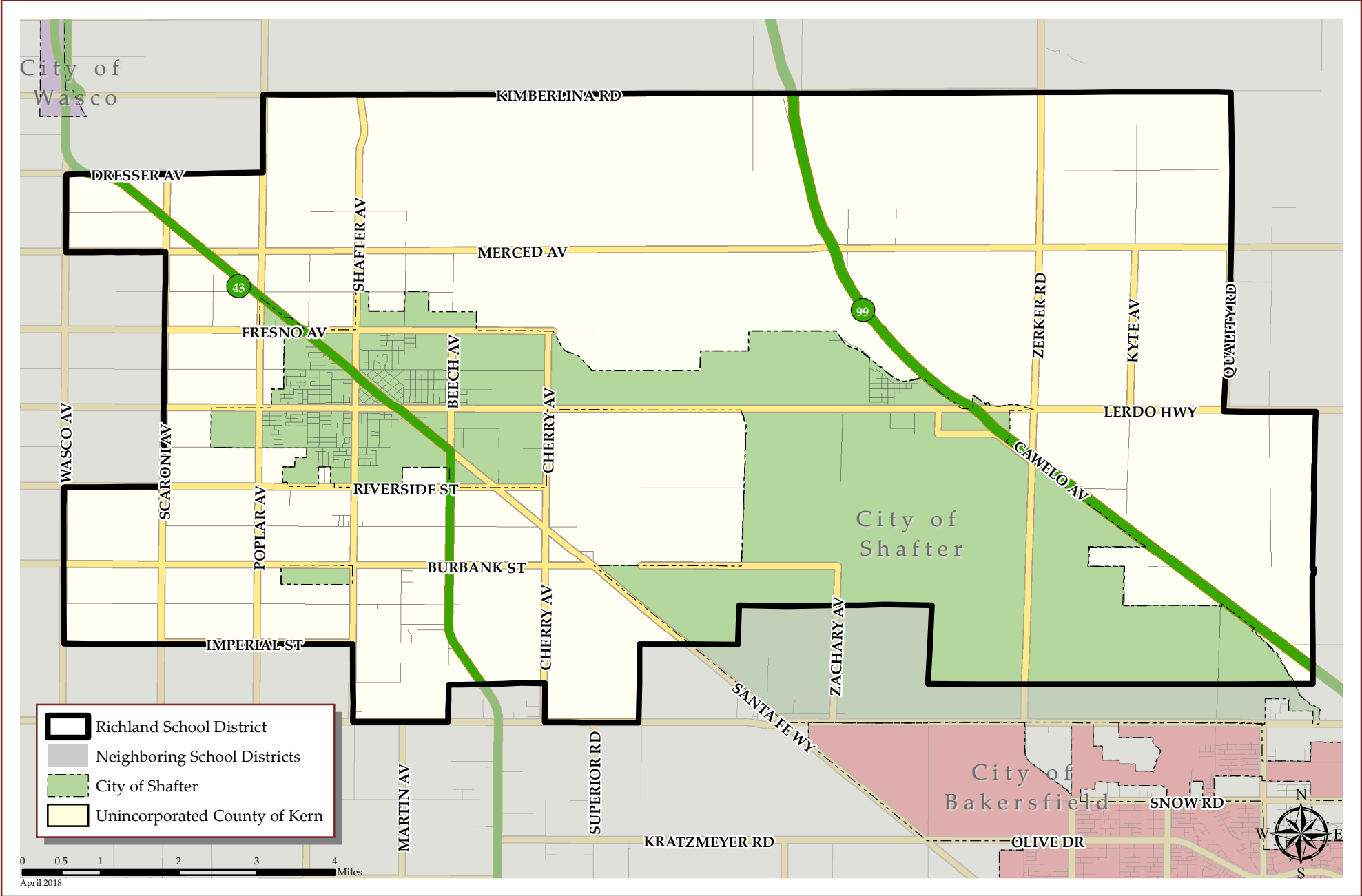
Since no SFA and MF units are expected to be constructed in the School District over the next five (5) years, SGRs for SFA and MF units were not identified. The School District, however, is required to adopt the Analysis on an annual basis, and if SFA and MF units are projected in the future the School District will update the Analysis accordingly.

## **2. Future Units**

In order to obtain information regarding future residential units, the planning departments of the City of Shafter ("City") and the County were contacted (please refer to the map on the following page for a geographic profile of the School District). Based on correspondence from the Cities and County (see Exhibit G), Cooperative Strategies has determined that the School District could experience the construction of 180 Future Units over the next five (5) years. Of these 180 Future Units, 73 units have already mitigated their impact on the School District through participation in one of the CFDs located throughout the School District. Table 2 distinguishes between Future Units by unit type.

# RICHLAND SCHOOL DISTRICT

# GEOGRAPHIC PROFILE





**Table 2**  
**Future Units by Unit Type**

<b>Unit Type</b>	<b>Mitigated Future Units</b>	<b>Non-Mitigated Future Units</b>	<b>Total Future Units</b>
Single Family Detached	73	107	180

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

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

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

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

**Table 3**  
**Projected Student Enrollment**

<b>School Level</b>	<b>Students Generated from Mitigated Future Units</b>	<b>Students Generated from Non-Mitigated Future Units</b>	<b>Total Projected Students from Future Units</b>
Elementary School	48	70	118
Middle School	15	21	36
<b>Total</b>	<b>63</b>	<b>91</b>	<b>154</b>

## B. Current Capacity

Collectively, the School District's school facilities in school year 2017/2018 have a capacity of 3,086 seats per Section 17071.25 of the Education Code. Of these 3,086 seats, 2,522 are at the elementary school level and 564 are at the middle school level (the School District's school level configuration in this comparison has been altered to be consistent with SAB Form 50-02). These capacities include seats from all new school facility construction projects funded by the State. Based on student enrollment data for school year 2017/2018, the enrollment of the School District is 3,031 students. As shown in Table 4, student enrollment exceeds facilities capacity at the middle school level and facilities capacity exceeds student enrollment at the elementary school level in school year 2017/2018.

**Table 4**  
**Existing School Facilities Capacity and Student Enrollment**

<b>School Level</b>	<b>2017/2018 Facilities Capacity <sup>[1]</sup></b>	<b>2017/2018 Student Enrollment <sup>[2]</sup></b>	<b>Excess/ (Shortage) Capacity</b>
Elementary School (Grades K-6)	2,522	2,314	208
Middle School (Grades 7-8)	564	717	(153)
<b>Total</b>	<b>3,086</b>	<b>3,031</b>	<b>55</b>
<i>[1] See Exhibit B for SAB Form 50-02, and Exhibit I for the Updated School Facilities Capacity Calculation.</i>			
<i>[2] Student enrollment provided by the School District.</i>			

## C. Projected Unhoused Students

As shown in Table 4, the existing facilities capacity of the School District determined in accordance with Section 65995.6(a) exceeds student enrollment currently being generated from existing residential units by 208 seats at the elementary school level. These surplus seats exist at facilities which will house (i) students generated from non-mitigated Future Units, (ii) students generated from mitigated Future Units, and (iii) students generated from units developed beyond the five-year period of the Analysis.

Due to a trend of increasing enrollment at all grade levels, Cooperative Strategies matriculated existing students forward five (5) years to determine whether any of the existing surplus elementary school will be needed to house future students generated from existing residential units. This resulted in a reduction of surplus seats at the elementary school level to 36. (Exhibit J contains a more detailed explanation of the matriculation process.)

The School District will experience growth beyond the next five (5) years. Therefore, the surplus seats identified in Table 4 must be allocated between the Future Units shown in Table 2 and residential units to be constructed beyond the next five (5) years. According to information obtained from the City and County, the School District can expect an additional 1,389 residential units through calendar year 2040. This number includes Future Units and residential units to be constructed beyond the next five (5) years. Allocating the surplus seats identified in Table 4 between Future Units and residential units to be constructed beyond the next five (5) years based on the number of students each group of units is expected to generate results in three (3) surplus seats at the elementary school level to be allocated over the next five (5) years.

Additionally, the surplus seats to be allocated over the next five (5) years must be apportioned between students generated from mitigated and non-mitigated Future Units (Table 5). Of the allocated surplus seats identified above, it was determined that two (2) surplus seats at the elementary school level are available to house students generated from non-mitigated Future Units. Tables 5 and 6 show the Projected Unhoused Students from mitigated and non-mitigated Future Units at each school level, while Exhibit J provides more information regarding the allocation of surplus seats.

**Table 5**  
**Projected Unhoused Students from Mitigated Future Units**

<b>School Level</b>	<b>Projected Student Enrollment</b>	<b>Surplus Seat Determination</b>	<b>Projected Unhoused Students</b>
Elementary School	48	1	47
Middle School	15	0	15
<b>Total</b>	<b>63</b>	<b>1</b>	<b>62</b>

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

<b>School Level</b>	<b>Projected Student Enrollment</b>	<b>Surplus Seat Determination</b>	<b>Projected Unhoused Students</b>
Elementary School	70	2	68
Middle School	21	0	21
<b>Total</b>	<b>91</b>	<b>2</b>	<b>89</b>

#### **IV. SURPLUS SCHOOL SITES AND EXISTING SURPLUS LOCAL FUNDS**

Section 65995.6(b) states that the School District must identify and consider (i) surplus property, if any, owned by the School District that can be used as a school site or that is available for sale to finance school facilities, (ii) the extent to which projected enrollment growth can be accommodated at existing school facilities, and (iii) local sources that are available to finance the construction or reconstruction of school facilities needed to accommodate any growth in enrollment attributable to the construction of new residential units. Additionally, Section 65995.5(c)(2) requires the School District to subtract from the school facilities cost impact created by Future Units the amount of Local Funds that the governing board has dedicated to facilities necessitated by new residential units. To comply with Section 65995.6(b), the School District has identified and considered property it owns and has determined that it does possess one (1) site that could be considered surplus (see Exhibit K for information on these sites). The Governing Board will review and re-adopt this Analysis annually, including a review of this determination and any need to consider property that may then be surplus to fund school facilities required to accommodate students being generated from existing residential units, or other students.

As for identifying and considering existing excess capacity that could accommodate the Projected Student Enrollment generated from non-mitigated Future Units, Table 6 in Section III.C. of this Analysis illustrates that the School District has considered and determined that two (2) excess seats exist at the elementary school level and has reduced the Projected Student Enrollment generated from non-mitigated Future Units accordingly.

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



## V. ALTERNATIVE NO. 2 FEE

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

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

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

#### 1. Per-Pupil Grant Amounts

The per-pupil grant amounts identified in Section 17072.10(a) of the Education Code were adjusted by the SAB on January 24, 2018, pursuant to Section 17072.10(b) of the Education Code. The per-pupil grant amounts specified in Section 17072.10 are adjusted annually by the SAB to reflect construction cost changes as set forth in the statewide cost index for class B construction. Further, pursuant to SAB Regulation 1859.71.2 and Section 17074.56 of the Education Code, the per-pupil grants have been increased to account for automatic fire alarm detection systems and fire sprinkler systems. Table 7 shows the base per-pupil grant amounts.

**Table 7**  
**Base Per-Pupil Grant Amounts (2018\$)**

<b>School Level</b>	<b>Per-Pupil Grant Amount</b>	<b>Additional Grants for Auto Alarm and Fire Sprinkler System</b>	<b>Base Per-Pupil Grant Amount</b>
Elementary School	\$11,567	\$208	\$11,775
Middle School	\$12,234	\$249	\$12,483

In addition to the base per-pupil grant amounts shown in Table 7, SAB Regulation 1859.76 provides additional grants for general site development on new school construction projects. Currently, these additional grants are calculated as (i) 6 percent of the base per-pupil grants for elementary and middle school projects, and (ii) a grant of \$18,827 per new useable acre acquired for new school construction. To determine the general site development grant for each school level, Cooperative Strategies first applied the percentages mentioned above to the base per-pupil grant amounts shown in Table 8.

Second, Cooperative Strategies applied the grant per new useable acre mentioned above to the student capacity of future school facilities and corresponding site size requirements for the School District listed in Table 10 to derive a grant amount per student (see Exhibit M for more information on the calculation of the additional grants for general site development). Table 8 shows these additional grants as well as the total per-pupil grant amount.

**Table 8**  
**Total Per-Pupil Grant Amount (2018\$)**

<b>School Level</b>	<b>Base Per-Pupil Grant Amount</b>	<b>Additional Grants for General Site Development</b>	<b>Total Per-Pupil Grant Amount</b>
Elementary School	\$11,775	\$973	\$12,748
Middle School	\$12,483	\$1,211	\$13,694

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

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

To determine the total new school construction grants under Section 65995.5, the number of Projected Unhoused Students to be generated from non-mitigated Future Units, as shown in Table 6, is multiplied by the total per-pupil grant amounts set forth in Section 17072.10(a) and (b) of the Education Code, as shown in Table 8. Table 9 shows the total new school construction grants of the School District pursuant to Section 65995.5(c)(1).

**Table 9**  
**Total New School Construction Grants for Projected**  
**Unhoused Students from Non-Mitigated Future Units (2018\$)**  
**(In Accordance with Section 65995.5(c)(1) of the Government Code)**

<b>School Level</b>	<b>Projected Unhoused Students</b>	<b>Total Per-Pupil Grant Amount</b>	<b>Total New Construction Grants</b>
Elementary School	68	\$12,748	\$866,864
Middle School	21	\$13,694	\$287,574
<b>Total</b>	<b>89</b>	<b>N/A</b>	<b>\$1,154,438</b>

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

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

**a. Site Size Requirement**

To calculate the amount of site acquisition and site development costs that may be included in the Alternative No. 2 Fee, a school district must determine the student capacity of future school facilities that will be needed to accommodate the Projected Unhoused Students, as well as students to be generated from residential development anticipated to occur over the next 20 years. Based on the educational programs of the School District, the School District has determined that future elementary school facilities will be designed to accommodate 650 students and future middle school facilities will be designed to accommodate 750 students. Based on these capacities, the guidelines included in the "School Site Analysis and Development Handbook" published by the State Department of Education as that handbook read as of January 1, 1998, identify the following site sizes for the School District.

**Table 10**  
**Student Capacities and Site Sizes of Future School Facilities**

<b>School Level</b>	<b>Student Capacity</b>	<b>Site Size (Acres)</b>
Elementary School	650	9.20
Middle School	750	18.40

It should be emphasized that the site sizes shown in Table 10 are based on site sizes recommended by the State Department of Education as of January 1, 1998. Since that time, the State Department of Education has prepared a revised Handbook that contains site size recommendations more consistent with School District policy. Please refer to Exhibit E for the site sizes more consistent with the revised Handbook.

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

Based on information regarding property sales within the County, the School District believes that \$89,291 per acre for site acquisition at all school levels is a reasonable estimate. As for site development, the School District estimates the cost to be approximately \$192,863 per acre at all school levels (the site development cost was taken from the School Facilities Needs Analysis prepared in 2017 and adjusted by the annual change in the construction cost index as published by Marshall & Swift). Table 11 lists the total estimated site acquisition costs and site development costs of the School District in accordance with Section 65995.5(h).

**Table 11**  
**Site Acquisition and Site Development Costs of Future School Facilities (2018\$)**

<b>School Level</b>	<b>Site Acquisition Cost <sup>[1]</sup></b>	<b>Site Development Cost <sup>[1]</sup></b>	<b>Total Site Cost</b>
Elementary School	\$766,277	\$1,774,340	\$2,540,617
Middle School	\$1,532,554	\$3,548,679	\$5,081,233
<i>[1] The site acquisition and site development costs are equal to the per acre costs listed above multiplied by the number of acres, as listed in Table 10.</i>			



c. **School Facilities Needed**

To ensure that non-mitigated Future Units are being charged an Alternative No. 2 Fee that is reasonably related to the school facilities that are required to house the Projected Unhoused Students to be generated from non-mitigated Future Units, the School District must identify the number of future school facilities that will be needed to house the Projected Unhoused Students to be generated from non-mitigated Future Units, as well as students to be generated from mitigated Future Units and residential development anticipated to occur over the next 20 years. To calculate the number of school facilities that the School District will need to adequately house the Projected Unhoused Students, the number of Projected Unhoused Students for each school level, as listed in Table 6, was divided by the applicable student capacity, as listed in Table 10. The number of school sites expected to be needed to house the Projected Unhoused Students generated from non-mitigated Future Units is shown in Table 12.

**Table 12**  
**School Facilities Needed**

<b>School Level</b>	<b>Total Facilities Needed</b>	<b>Facilities Needed for Students Generated from Mitigated Future Units</b>	<b>Facilities Needed for Students Generated from Non-Mitigated Future Units</b>
Elementary School	0.177	0.072	0.105
Middle School	0.048	0.020	0.028

It is important to realize that while the number of Projected Unhoused Students equates only to approximately 10.5 percent of an elementary school and 2.8 percent of a middle school, the School District will need to construct at least one (1) elementary school and one (1) middle school to accommodate (i) existing unhoused students, (ii) students generated from mitigated Future Units, (iii) students generated from non-mitigated Future Units, and (iv) students generated from future residential units beyond the next five (5) years.

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

The calculation of the total school site acquisition and site development cost impacts under Section 65995.5(h) is a two-step process. The first step involves calculating the total school site acquisition and site development costs related to the Projected Unhoused Students generated from non-mitigated Future Units. The calculation of this first step is shown in Table 13.

**Table 13**  
**Total School Site Acquisition and Site Development**  
**Costs for Students from Non-Mitigated Future Units (2018\$)**

<b>School Level</b>	<b>Facilities Needed for Students Generated from Non-Mitigated Future Units</b>	<b>Site Cost</b>	<b>Total Site Costs</b>
Elementary School	0.105	\$2,540,617	\$266,765
Middle School	0.028	\$5,081,233	\$142,275

Only a portion of the total site costs may be included in the calculation of the Alternative No. 2 Fee. Accordingly, the total school site acquisition and site development costs under Section 65995.5(h) must be reduced by half to arrive at the Alternative Fee No. 2 Site Costs. The calculation of this step is shown in Table 14.

**Table 14**  
**Alternative No. 2 Fee Site Costs (2018\$)**  
**(In Accordance with Section 65995.5(h) of the Government Code)**

<b>School Level</b>	<b>Total Site Costs</b>	<b>Multiplier</b>	<b>Alternative No. 2 Fee Site Cost</b>
Elementary School	\$266,765	50.00%	\$133,383
Middle School	\$142,275	50.00%	\$71,138

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

As stated previously, the initial step in calculating the maximum Alternative No. 2 Fee is to identify (i) the total new school construction grant, and (ii) the site acquisition and development costs pursuant to Section 65995.5(h).

The sum of these amounts, which is the Alternative No. 2 Fee School Facility Costs, is the maximum amount of school facility costs that may be included in the Alternative No. 2 Fee before any local fund credits are applied. For the School District, the total new school construction grant is \$1,154,438 and the total site acquisition and site development cost pursuant to Section 65995.5(h) is \$204,521. These costs and the Alternative No. 2 Fee School Facility Costs are shown by school level in Table 15.

**Table 15**  
**Alternative No.2 Fee School Facility Costs (2018\$)**  
**(In Accordance with Section 65995.5(c)(1) of the Government Code)**

<b>School Level</b>	<b>Total New Construction Grants</b>	<b>Alternative No. 2 Fee Site Costs</b>	<b>Alternative No. 2 Fee School Facility Costs</b>
Elementary School	\$866,864	\$133,383	\$1,000,247
Middle School	\$287,574	\$71,138	\$358,712
<b>Total</b>	<b>\$1,154,438</b>	<b>\$204,521</b>	<b>\$1,358,959</b>

**B. Credit for Local Funds**

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

**Table 16**  
**Net Alternative No.2 Fee School Facility Costs (2018\$)**  
**(In Accordance with Section 65995.5(c)(2) of the Government Code)**

<b>Item</b>	<b>Amounts</b>
Alternative No. 2 Fee School Facility Costs	\$1,358,959
Credit for Existing Surplus Local Funds	\$0
<b>Net Alternative No. 2 Fee School Facility Costs</b>	<b>\$1,358,959</b>

## C. **Alternative No. 2 Fee Calculation**

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

### 1. **Average Square Footage per Unit**

In order to project the total square footage of assessable space of the non-mitigated Future Units, the Analysis must estimate the average square footage of Future SFD Units to be constructed in the School District. To estimate the average square footage of Future Units to be constructed in the School District, Cooperative Strategies analyzed square footage information of residential units constructed over the last five (5) years and confirmed those estimates with the Planning Departments of the City and County. Based on this information, the average Future SFD Unit to be constructed within the School District is estimated to be 2,000 square feet (see Exhibit G).

### 2. **Total Square Footage of Assessable Space**

To calculate the total square footage of assessable space for non-mitigated Future Units, the average square footage of Future SFD Units listed above was multiplied by the number of non-mitigated Future Units listed in Table 2. The results of this operation are shown in Table 17.

**Table 17**  
**Estimated Total Residential Square Footage**

<b>Land Use</b>	<b>Non-Mitigated Future Units</b>	<b>Average Square Footage</b>	<b>Total Square Footage</b>
Single Family Detached	107	2,000	214,000

The projected total square footage of non-mitigated future residential units identified in Table 17 includes units that may result from Reconstruction. For additional information regarding the imposition of the Alternative No. 2 Fee and Alternative No. 3 Fee on Reconstruction please refer to Exhibit H.

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

To calculate the Alternative No. 2 Fee, the Net Alternative No. 2 Fee School Facility Costs, as listed in Table 16, were divided by the total square footage of assessable space of the non-mitigated Future Units, as listed in Table 17. Table 18 provides the Alternative No. 2 Fee that can be adopted by the School District.

**Table 18**  
**Alternative No. 2 Fee (2018\$)**

<b>Item</b>	<b>Amount/Square Footage</b>
Net Alternative No. 2 Fee School Facility Costs	\$1,358,959
Total Residential Square Footage	214,000
<b>Alternative No. 2 Fee</b>	<b>\$6.35</b>

## **VI. ALTERNATIVE NO. 3 FEE**

The Alternative No. 2 Fee, which is the maximum Alternative Fee that may be imposed during periods when State funds for new construction are available, was calculated in Section V in accordance with Section 65995.5. During periods when the SAB is no longer approving apportionments for new construction due to a lack of funds available, the Alternative No. 3 Fee may be imposed by a school district. Additionally, in accordance with Section 1859.81 of the SAB regulations, a school district requesting financial hardship assistance funding is required to impose the maximum developer fee justified by law (the Alternative No. 2 Fee, or the Alternative No. 3 Fee when the State declares that such fees can be imposed), or an alternative source greater than or equal to the amount of such fees. Similar to the methodology of the calculations performed in Section V, this Section VI provides a calculation of the Alternative No. 3 Fee in accordance with Section 65995.7.

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

Pursuant to Section 65995.7, the Alternative No. 3 Fee School Facility Cost, which is the maximum amount of school facility costs that may be included in the Alternative No. 3 Fee, is calculated by increasing the Net Alternative No. 2 Fee School Facility Costs by an amount not to exceed the Alternative No. 2 Fee School Facility Costs. As required by Section 65995.7, this amount has been reduced by the amount of local funds (\$0 in the case of the School District) identified pursuant to Section 65995.5(c)(2). Accordingly, Table 19 shows the Net Alternative No. 2 Fee School Facility Costs previously shown in Table 16 and adds to that amount the Alternative No. 2 Fee School Facility Costs previously shown in Table 15. The result, shown in Table 19, is the Alternative No. 3 Fee School Facility Costs.

**Table 19**  
**Alternative No. 3 Fee School Facility Costs (2018\$)**  
**(In Accordance with Section 65995.7 of the Government Code)**

<b>Item</b>	<b>Amounts</b>
Net Alternative No. 2 Fee School Facility Costs	\$1,358,959
Alternative No. 2 Fee School Facility Costs	\$1,358,959
<b>Alternative No. 3 Fee School Facility Costs</b>	<b>\$2,717,918</b>



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

To calculate the Alternative No. 3 Fee, the Alternative No. 3 Fee School Facility Costs were divided by the total square footage of assessable space of the non-mitigated Future Units listed in Table 17. This calculation is required by Section 65995.5(c)(3) and outlined in Section V.C. of the Analysis. Table 18 provides the Alternative No. 3 Fee that can be levied by the School District on new residential development where permitted by applicable law.

**Table 18**  
**Alternative No. 3 Fee (2018\$)**

<b>Item</b>	<b>Amount/Square Footage</b>
Alternative No. 3 Fee School Facility Costs	\$2,717,918
Total Residential Square Footage	214,000
<b>Alternative No. 3 Fee</b>	<b>\$12.70</b>

## VII. SECTION 66000 OF THE GOVERNMENT CODE

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

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

New residential development in the School District, as shown in the Analysis, will generate additional students who will require the School District to provide additional school facilities. The amount to be included in the Alternative Fees is specified by statute. The Alternative No. 2 Fee of \$6.35 per square foot and the Alternative No. 3 Fee of \$12.70 per square foot are justified in the Analysis. The estimated average school facilities cost impacts on the School District per square foot of residential development as estimated in Exhibit E is \$16.90. As the actual school facilities cost impacts per square foot of residential construction is greater than the Alternative Fees, it is reasonable for the School District to determine that the Alternative No. 2 Fee of \$6.35 per square foot and the Alternative No. 3 Fee of \$12.70 per square foot are roughly proportional and reasonably related to the actual impacts caused by residential development on the School District.

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

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

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**EXHIBIT A**

**Updated SAB Form 50-01**

## ENROLLMENT CERTIFICATION/PROJECTION

SAB 50-01 (Rev. 01/03) Excel (Rev. 2/27/2003)

SCHOOL DISTRICT

RICHLAND-LERDO ELEMENTARY

COUNTY

KERN

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

63578

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

## Part A. Enrollment Data - (districts or county superintendent of schools)

	3rd Previous	2nd Previous	Previous	Current
Grade	2001/02	2002/03	2003/04	2004/05
K	297	294	317	312
1	299	308	314	335
2	322	294	320	324
3	310	325	313	320
4	317	336	341	327
5	315	305	343	348
6	310	315	325	347
7	272	306	317	330
8	222	284	314	315
9				
10				
11				
12				
TOTAL	2,664	2,747	2,904	2,958

## Part B. Pupils Attending Schools Chartered By Another District

3rd Previous	2nd Previous	Previous	Current

## Part C. Continuation High School - (district only)

Grade	3rd Previous	2nd Previous	Previous	Current
9				
10				
11				
12				

## Part D. Special Day Class Pupils - (district or county superintendent of schools)

Elementary	Non-Severe	Severe	Secondary	Non-Severe	Severe
MR	19		MR		
HH	2		HH		
DEAF			DEAF		
HI			HI		
SLI	6		SLI		
VI	2		VI		
SED			SED		
OI	2		OI		
OHI	6		OHI		
SLD	12		SLD		
DB			DB		
MH			MH		
AUT	1		AUT		
TBI			TBI		
TOTAL	50		TOTAL		

## Part E. Special Day Class Enrollment - (county superintendent of schools only)

3rd Previous	2nd Previous	Previous	Current

## Part F. Number of New Dwelling Units

305

## Part G. District Student Yield Factor

0.500

## Part H. Five Year Projected Enrollment - School Facility Program Projections - (except special day class pupils only)

K-8	7-8	9-12	TOTAL
2,508	737		3,245

## Projections - special day class pupils only

Elementary	Non-Severe	Severe	Secondary	Non-Severe	Severe
MR	21		MR		
HH	2		HH		
DEAF			DEAF		
HI			HI		
SLI	7		SLI		
VI	2		VI		
SED			SED		
OI	2		OI		
OHI	7		OHI		
SLD	13		SLD		
DB			DB		
MH			MH		
AUT	1		AUT		
TBI			TBI		
TOTAL	55		TOTAL		

## Part I.

## One Year Projected Enrollment - State Relocatable Program Projections - (except special day class pupils only)

K-6	7-8	9-12	TOTAL
2,348	680		3,028

## Projections - (special day class pupils only) (Includes Severe &amp; Non-Severe)

Elementary	Secondary	Elementary	Secondary
MR	19	OI	2
HH	2	OHI	6
DEAF		SLD	12
HI		DB	
SLI	6	MH	
VI	2	AUT	1
SED		TBI	
TOTAL	50	TOTAL	50

I certify, as the District Representative, that the information reported on this form is true and correct and that I am designated as an authorized district representative by the governing board of the district.

If the district is requesting an augmentation in the enrollment projection pursuant to Regulation Section 1859.42 (b), 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.

SIGNATURE OF DISTRICT REPRESENTATIVE

DATE

4/11/05

**EXHIBIT B**

**Updated SAB Form 50-02**



**EXISTING SCHOOL BUILDING CAPACITY**

OFFICE OF PUBLIC SCHOOL CONSTRUCTION

SAB 50-02 (Rev. 09/02) Excel (Rev. 11/21/2002)

Page 4 of 4

SCHOOL DISTRICT <b>RICHLAND-LERDO ELEMENTARY</b>	FIVE DIGIT DISTRICT CODE NUMBER (see California Public School Directory) <b>63578</b>
COUNTY <b>KERN</b>	HIGH SCHOOL ATTENDANCE AREA (HSAA) OR SUPER HSAA (if applicable)

**PART I - Classroom Inventory**    ☐ NEW    ☐ ADJUSTED

	K-6	7-8	9-12	Non-Severe	Severe	Total
Line 1. Leased State Relocatable Classrooms						
Line 2. Portable Classrooms leased less than 5 years						
Line 3. Interim Housing Portables leased less than 5 years						
Line 4. Interim Housing Portables leased at least 5 years						
Line 5. Portable Classrooms leased at least 5 years						
Line 6. Portable Classrooms owned by district	46					46
Line 7. Permanent Classrooms	56	17		1		74
Line 8. Total (Lines 1 through 7)	102	17		1		120

**PART II - Available Classrooms****Option A.**

	K-6	7-8	9-12	Non-Severe	Severe	Total
a. Part I, line 4						
b. Part I, line 5						
c. Part I, line 6	46					46
d. Part I, line 7	56	17		1		74
e. Total (a, b, c, & d)	102	17		1		120

**Option B.**

	K-6	7-8	9-12	Non-Severe	Severe	Total
a. Part I, line 8	102	17		1		120
b. Part I, lines 1,2,5 and 6 (total only)						46
c. 25 percent of Part I, line 7 (total only)						19
d. Subtract c from b (enter 0 if negative)	27					27
e. Total (a minus d)	75	17		1		93

**PART III - Determination of Existing School Building Capacity**

	K-6	7-8	9-12	Non-Severe	Severe
Line 1. Classroom capacity	1,875	459		13	
Line 2. SER adjustment	91	22		1	
Line 3. Operational Grants					
Line 4. Greater of line 2 or 3	91	22		1	
Line 5. Total of lines 1 and 4	1,966	481		14	

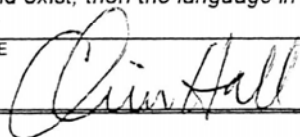
I certify, as the District Representative, that the information reported on this form is true and correct and that:

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

This form is an exact duplicate (verbatim) of the form provided by the Office of Public School Construction (OPSC).

In the event a conflict should exist, then the language in the OPSC form will prevail.

SIGNATURE OF DISTRICT REPRESENTATIVE



DATE

11/25/2002

**EXHIBIT C**

**Updated SAB Form 50-03**

**ELIGIBILITY DETERMINATION**

OFFICE OF PUBLIC SCHOOL CONSTRUCTION

Page 4 of 4

SAB 50-03 (Rev. 09/02) Excel (Rev. 11/21/2002)

SCHOOL DISTRICT <b>RICHLAND-LERDO ELEMENTARY</b>	FIVE DIGIT DISTRICT CODE NUMBER (see California Public School Directory) <b>63578</b>
BUSINESS ADDRESS <b>331 Shafter Avenue</b>	HIGH SCHOOL ATTENDANCE AREA (HSAA) OR SUPER HSAA (# applicable)
CITY <b>Shafter, CA 93263</b>	COUNTY <b>KERN</b>

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

DISTRICT REPRESENTATIVE <b>Lyle W. Mack</b>	TELEPHONE NUMBER <b>(661) 746-8600</b>	E-MAIL ADDRESS <b>lyle@richland.k12.ca.us</b>
DISTRICT REPRESENTATIVE <b>Chris Hall</b>	TELEPHONE NUMBER <b>(661) 746-8611</b>	E-MAIL ADDRESS <b>chris@richland.k12.ca.us</b>

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

	K-6	7-8	9-12	Non-Severe	Severe
1. Projected Enrollment (Part G, Form SAB 50-01)	2,505	674		34	
2. Existing School Building Capacity (Part III, line 5 of Form SAB 50-02)	1,966	481		14	
3. New Construction Baseline Eligibility (line 1 minus line 2)	539	193		20	
4. Adjustment to the baseline eligibility.					
5. Adjusted Baseline Eligibility (line 3 plus or minus line 4)					

**Part III - Modernization Eligibility** ☐ NEW ☒ ADJUSTED

1. SCHOOL NAME:

**Richland Junior High**

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

**Option B**

2. Permanent space at least 25 years old (report by classroom or square footage)	5					
3. Portable space at least 20 years old (report by classroom or square footage)	0					
4. Total (lines 2 and 3)	5					
5. Remaining permanent and portable space (report by classroom or square footage)	27					
6. Total (lines 4 and 5)	32					
7. Percentage (divide line 4 by line 6)	16%					
		K-6	7-8	9-12	Non-Severe	Severe
8. CBEDS enrollment at school site			919			
9. Modernization eligibility (multiply line 7 by each grade group on line 8)			147			

**School Site Map on File with OPSC**

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

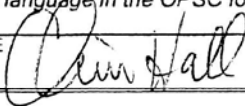
I am designated as an authorized district representative by the governing board of the district; and:

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

on **December 10, 2001**; and,

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

SIGNATURE OF DISTRICT REPRESENTATIVE



DATE

**11/26/2002**

**EXHIBIT D**

**Eligibility Determination from the SAB**



# Project Main Page

[Return to Search Results](#)

DSA eTracker:    [03-107263](#)  
Application:    50/63578-00-001  
County:    Kern  
District:    Richland Union Elementary  
Site:    SEQUOIA ELEMENTARY  
District Rep:    Mr. Martin R. Rodriguez

Details

Fund Releases

Budget Summary

Transaction Detail

Modernization Eligibility

New Construction Eligibility

District Code	Attendance Area	Original SAB Approval Date	Recent SAB Approval
63578	0	1/22/2003	1/25/2006

SAB 50-03 New Construction Eligibility Information

New Construction Baseline Eligibility

Grade Level:	K - 6	7 - 8	9 - 12	Non-Severe	Severe
Established Eligibility:	82	100	0	-11	0
SAB Approvals/Adjustments:	-82	73	0	39	0
Remaining Eligibility:	0	173	0	28	0

SAB 50-03 Eligibility Document Status/Dates

Status:	PM Complete
Date Signed:	12/28/2001
Date Received:	12/31/2001
SAB Approval Date:	1/22/2003

**EXHIBIT E**

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



**RICHLAND SCHOOL DISTRICT****School Facility Cost Impacts per Residential Square Foot****April 2018****School Facility Costs**

School Level	Site Acquisition Cost	Facility Construction	Total Cost
Elementary School	\$849,568	\$23,041,115	\$23,890,683
Middle School	\$1,532,554	\$35,747,208	\$37,279,762

**Costs per Student**

School Level	Total Cost	Students Housed	Cost per Student
Elementary School	\$23,890,683	650	\$36,755
Middle School	\$37,279,762	750	\$49,706

**School Facility Cost Impacts per Residential Unit**

School Level	Cost per Student	Weighted Average SGR	Cost per Unit
Elementary School	\$36,755	0.6542	\$24,045
Middle School	\$49,706	0.1963	\$9,755
<b>Total School Facility Cost Impact</b>			<b>\$33,800</b>
Average Square Footage <sup>[1]</sup>			2,000
<b>School Facility Cost Impact per Square Foot</b>			<b>\$16.90</b>
<i>[1] See Table 17 of the Analysis.</i>			

**RICHLAND SCHOOL DISTRICT****Summary of Estimated Costs****Elementary School****April 2018**

<b>A. Site</b>			<b>\$889,568</b>
	Purchase Price of Property	\$849,568	
	Acres <sup>[1]</sup> :	10.2	
	Cost/Acre:	\$83,291	
	EIR	\$20,000	
	Appraisals	\$10,000	
	Surveys	\$5,000	
	Escrow/Title	\$5,000	
	<i>[1] Assumes Net Usable Acres.</i>		
<b>B. Plans</b>			<b>\$1,302,000</b>
	Architect's Fee	\$1,162,500	
	Preliminary Tests	\$20,000	
	DSA/SDE Plan Check	\$99,500	
	Energy Fee Analysis	\$15,000	
	Other	\$5,000	
<b>C. Construction</b>			<b>\$19,500,000</b>
	(Includes Construction, Site Development, General Site Development, and Technology)		
	Square Feet / Student	75	
	Cost / Square Feet	\$400	
<b>D. Tests</b>			<b>\$50,000</b>
<b>E. Inspection</b>			<b>\$144,000</b>
	(\$12,000 per month for 12 months)		
<b>F. Furniture and Equipment</b>			<b>\$404,625</b>
	(\$5 per Square Foot, includes Cost Index Adjustment of 66%)		
<b>G. Contingency</b>			<b>\$336,353</b>
	(\$2,000 + 1.5% of items A-F)		
<b>H. Items Not Funded by the State</b>			<b>\$1,264,137</b>
	Technology (5% of Construction)	\$975,000	
	Library Books (8 books/student @ \$15)	\$78,000	
	Landscaping (\$0.44/sq. ft x 10.2 acres)	\$195,497	
	Landscape Architect Fees (8% of Landscaping)	\$15,640	
<b>I. Total Estimated Cost</b>			<b>\$23,890,683</b>

Summary	
School Facilities Capacity - Traditional Calendar	650
School Facilities Cost per Student - Traditional Calendar	\$36,755

**RICHLAND SCHOOL DISTRICT****Summary of Estimated Costs****Middle School****April 2018**

<b>A. Site</b>			<b>\$1,587,554</b>
	Purchase Price of Property	\$1,532,554	
	Acres <sup>[1]</sup> :	18.4	
	Cost/Acre:	\$83,291	
	EIR	\$25,000	
	Appraisals	\$12,000	
	Surveys	\$8,000	
	Escrow/Title	\$10,000	
	<i>[1] Assumes Net Usable Acres.</i>		
<b>B. Plans</b>			<b>\$1,917,000</b>
	Architect's Fee	\$1,687,500	
	Preliminary Tests	\$45,000	
	DSA/SDE Plan Check	\$152,000	
	Energy Fee Analysis	\$25,000	
	Other	\$7,500	
<b>C. Construction</b>			<b>\$30,000,000</b>
	(Includes Construction, Site Development, General Site Development, and Technology)		
	Square Feet / Student	100	
	Cost / Square Feet	\$400	
<b>D. Tests</b>			<b>\$180,000</b>
<b>E. Inspection</b>			<b>\$324,000</b>
	(\$12,000 per month for 18 months x 1.5 inspectors)		
<b>F. Furniture and Equipment</b>			<b>\$747,000</b>
	(\$6 per Square Foot, includes Cost Index Adjustment of 66%)		
<b>G. Contingency</b>			<b>\$523,333</b>
	(\$2,000 + 1.5% of items A-F)		
<b>H. Items Not Funded by the State</b>			<b>\$2,000,875</b>
	Technology (5% of Construction)	\$1,500,000	
	Library Books (8 books/student @ \$20)	\$120,000	
	Landscaping (\$0.44/sq. ft. x 18.4 acres)	\$352,662	
	Landscape Architect Fees (8% of Landscaping)	\$28,213	
<b>I. Total Estimated Cost</b>			<b>\$37,279,762</b>

Summary	
School Facilities Capacity - Traditional Calendar	750
School Facilities Cost per Student - Traditional Calendar	\$49,706

**EXHIBIT F**

**Bonding Capacity Calculation**

**Richland School District**  
**Bonding Capacity Calculation**  
**For Fiscal Year 2017/2018**

Description		Value
(1)	Total assessed valuation of locally assessed and state assessed non-operating non-unitary tangible taxable property	\$1,639,796,561
(2)	Total assessed valuation of state assessed unitary and operating non-unitary tangible property	\$12,154,776
(3)	Total assessed valuation of tangible taxable property (Total of Items 1 and 2)	\$1,651,951,337
(4)	Enter applicable percentage bond debt limit Section 15102 (School District) 1.25% Section 15108 (Unified School District) 2.5%	1.25%
(5)	Bonding capacity (Item 3 times Item 4)	\$20,649,392
(6)	Senate Bill 50 local bonding capacity threshold 15% of District's local bonding capacity	\$3,097,409
(7)	Senate Bill 50 local bonding capacity threshold 30% of District's local bonding capacity	\$6,194,818
Source: Kern County Office of the Auditor-Controller.		

**EXHIBIT G**

**Correspondence with the City and County**





# COOPERATIVE STRATEGIES

COMPLETE FINANCIAL & DEMOGRAPHIC PLANNING FOR EDUCATION

January 2, 2018

Ms. Holly Nelson  
Supervising Planner  
County of Kern  
2700 "M" Street, Suite 100  
Bakersfield, CA 93301-2370

**Re: Residential Development Projections within Richland School District  
Boundaries**

Dear Ms. Nelson,

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

Projections regarding the Future Units to be constructed within the area of the County served by the School District are shown on the following page. Based on information obtained from the County and the School District, Cooperative Strategies has prepared Future Unit estimates and Future Unit square footage estimates for the School District. Cooperative Strategies would like to provide the County with the opportunity to review, and if necessary, modify these projections. Please complete the attached page ("Certificate") and return to [bgibbs@coopstrategies.com](mailto:bgibbs@coopstrategies.com) by January 31, 2017.

Ms. Nelson, should you have any questions regarding the projections please contact me at 949.250.8397. We sincerely appreciate your assistance in providing this information and look forward to hearing from you soon.

Sincerely,

Brooke Gibbs  
Associate

In its efforts to assist Cooperative Strategies, LLC in preparing the SFNA in accordance with the guidelines of Section 65995.5(c)(3) of the Government Code for the Richland School District, the County of Kern ("County"):

☒ The County concurs with the previous residential development projections as provided below:

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

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

☐ The residential development projected by the County is listed below:

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

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

Signed, Holly Nelson, of the County of Kern on 9 Jan, 2018.

Printed Name:

Title:

Holly Nelson  
Supervising Planner  
Current Planning Division  
Land Division Unit



# COOPERATIVE STRATEGIES

COMPLETE FINANCIAL & DEMOGRAPHIC PLANNING FOR EDUCATION

January 2, 2018

Ms. Suzanne Forrest  
Senior Planner  
City of Shafter  
336 Pacific Avenue  
Shafter, CA 93263

**Re: Residential Development Projections within Richland School District Boundaries**

Dear Ms. Forrest,

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

Projections regarding the Future Units to be constructed within the area of the City served by the School District are shown on the following page. Based on information obtained from the City and the School District, Cooperative Strategies has prepared Future Unit estimates and Future Unit square footage estimates for the School District. Cooperative Strategies would like to provide the City with the opportunity to review, and if necessary, modify these projections. Please complete the attached page ("Certificate") and return to [bgibbs@coopstrategies.com](mailto:bgibbs@coopstrategies.com) by January 31, 2018.

Ms. Forrest, should you have any questions regarding the projections please contact me at 949.250.8397. We sincerely appreciate your assistance in providing this information and look forward to hearing from you soon.

Sincerely,

Brooke Gibbs  
Associate

In its efforts to assist Cooperative Strategies, LLC in preparing the SFNA in accordance with the guidelines of Section 65995.5(c)(3) of the Government Code for the Richland School District, the City of Shafter ("City"):

☒ The City concurs with the previous residential development projections as provided below:

Unit Type	Projected Number of Units <sup>[1]</sup>	Estimated Average Square Footage per Unit
Single Family Detached (i.e. single family home)	180	2,000
Single Family Attached (e.g. condos, duplexes, townhomes, etc.)	0	N/A
Multifamily (i.e. apartments)	0	N/A

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

☐ The residential development projected by the City is listed below:

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

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

Signed, Suzanne Forrest, of the City of Shafter on 1-5-2018.

Printed Name: Suzanne Forrest  
Title: Senior Planner

**EXHIBIT H**

**Reconstruction**

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

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

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

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

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

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

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

**EXHIBIT I**

**Updated School Facilities Capacity Calculation**



## **RICHLAND SCHOOL DISTRICT**

### **School Facilities Capacity Calculation**

<b>Application</b>	<b>Item</b>	<b>Elementary School</b>	<b>Middle School</b>
N/A	SAB Form 50-02	1,966	481
N/A	Non-Severe/Severe Capacity	14	0
50/63578-00-002	Redwood Elementary	17	83
50/63578-00-001	Sequoia Elementary	525	0
<b>Total Capacity</b>	<b>N/A</b>	<b>2,522</b>	<b>564</b>

**EXHIBIT J**

**Matriculation and Allocation of Surplus Seats**

**RICHLAND SCHOOL DISTRICT****Matriculation of Surplus Seats****Actual and Projected School Students from Existing Units**

<b>Grade Level</b>	<b>School Year 2017/2018</b>	<b>School Year 2018/2019</b>	<b>School Year 2019/2020</b>	<b>School Year 2020/2021</b>	<b>School Year 2021/2022</b>	<b>School Year 2022/2023</b>
Kindergarten	364	364	364	364	364	364
Grade 1	302	364	364	364	364	364
Grade 2	291	302	364	364	364	364
Grade 3	314	291	302	364	364	364
Grade 4	349	314	291	302	364	364
Grade 5	296	349	314	291	302	364
Grade 6	398	296	349	314	291	302
Grade 7	352	398	296	349	314	291
Grade 8	365	352	398	296	349	314
<b>Elementary School Students</b>	<b>2,314</b>	<b>2,280</b>	<b>2,348</b>	<b>2,363</b>	<b>2,413</b>	<b>2,486</b>
<b>Middle School Students</b>	<b>717</b>	<b>750</b>	<b>694</b>	<b>645</b>	<b>663</b>	<b>605</b>

**RICHLAND SCHOOL DISTRICT****Allocation of Surplus Seats****Actual and Projected Surplus School Seats from Existing Units**

Item	School Year 2017/2018	School Year 2022/2023
Actual/Projected Elementary School Students from Existing Units	2,314	2,486
Existing Elementary School Facilities Capacity	2,522	2,522
<b>Excess Elementary School Seats</b>	<b>208</b>	<b>36</b>
Actual/Projected Middle School Students from Existing Units	717	605
Existing Middle School Facilities Capacity	564	564
<b>Excess Middle School Seats</b>	<b>-153</b>	<b>-41</b>

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

Item	Number of Future Units	Number of Total Units <sup>[1]</sup>
Number of SFD Units	180	2,110
Number of SFA Units	0	193
Number of MF Units	0	385
<i>[1] Source: Kern Council of Governments</i>		

**Percent of Students Generated from Future Units**

Item	Students Generated from Future Units	Students Generated from Total Units
Elementary School Students from SFD Units	119	1,389
Elementary School Students from SFA Units	0	0
Elementary School Students from MF Units	0	0
<b>Total Elementary School Students Generated</b>	<b>119</b>	<b>1,389</b>
Middle School Students from SFD Units	36	422
Middle School Students from SFA Units	0	0
Middle School Students from MF Units	0	0
<b>Total Middle School Students Generated</b>	<b>36</b>	<b>422</b>
<b>Percent of Elementary School Students Generated from Future Units</b>		<b>8.57%</b>
<b>Percent of Middle School Students Generated from Future Units</b>		<b>8.53%</b>

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

School Level	Excess Seats	% of Students Generated from Future Units
Elementary School	36	8.57%
Middle School	0	8.53%
<b>Excess Elementary School Seats Allocated Students Generated from Future Units</b>		<b>3</b>
<b>Excess Middle School Seats Allocated Students Generated from Future Units</b>		<b>0</b>

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

<b>Item</b>	<b>Non-Mitigated Future Units</b>	<b>Total Future Units</b>
Number of SFD Units	107	180
Number of SFA Units	0	0
Number of MF Units	0	0

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

<b>Item</b>	<b>Students Generated from Non-Mitigated Future Units</b>	<b>Students Generated from Total Future Units</b>
Elementary School Students from SFD Units	70	119
Elementary School Students from SFA Units	0	0
Elementary School Students from MF Units	0	0
<b>Total Elementary School Students Generated</b>	<b>70</b>	<b>119</b>
Middle School Students from SFD Units	21	36
Middle School Students from SFA Units	0	0
Middle School Students from MF Units	0	0
<b>Total Middle School Students Generated</b>	<b>21</b>	<b>36</b>
<b>Percent of Elementary School Students Generated from Non-Mitigated Future Units</b>		<b>58.82%</b>
<b>Percent of Middle School Students Generated from Non-Mitigated Future Units</b>		<b>58.33%</b>

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

<b>School Level</b>	<b>Excess Seats</b>	<b>% of Students Generated from Non-Mitigated Future Units</b>
Elementary School	3	58.82%
Middle School	0	58.33%
<b>Excess Seats Allocated to Elementary School Students</b>		<b>2</b>
<b>Excess Seats Allocated to Middle School Students</b>		<b>0</b>

**EXHIBIT K**

**Surplus Site Determination**

Section 65995.6(b)(1) requires the School District to identify and consider any surplus property owned by the School District that may be used as a school site or that is available for sale to finance school facilities. The School District has identified one (1) site that may fall into this category.

**1. Los Angeles St./Schneidt St. Property**

The School District currently owns a 12.5 acre site located near the intersection of Los Angeles Street and Schneidt Street intended for use as a fourth elementary school. Based on the per-acre site acquisition costs utilized in the Analysis, the value of this site is estimated to be \$449,738 and will be considered to offset the impact of Future Units. This potential funding will be discussed further in Exhibit L.

**EXHIBIT L**

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



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

**1. Lease Financings**

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

The School District has not issued any recent lease financings to offset the impact of Future.

**2. General Obligation Bonds**

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

The School District has not issued any recent GO bonds.

**3. Redevelopment Pass-Throughs**

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

The School District currently has pass-through agreements with the City of Shafter. Over the last five (5) years, the School District has collected approximately \$485,305 in redevelopment revenue from these pass through agreements. A similar amount of redevelopment revenue can be expected to be received over the next five (5) years. At this time, \$485,305 is considered to be available as potential funding for school facilities to house students generated from Future Units.

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

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

The School District has formed three (3) CFDs: CFD No. 2005-1, CFD No. 2008-1, and CFD No. 2008-2. These CFDs were formed on specific residential development projects as an alternative to paying mitigation payments. Accordingly, none of the special tax or bond proceeds from these CFDs will be available to offset the cost impacts of any residential units constructed outside the boundaries of the CFDs. Similarly, the School District will not be permitted to collect additional statutory school fees, mitigation payments or Alternative Fees from the units located within the CFDs, nor were the units from the CFDs considered in calculating the Alternative No. 2 and Alternative No. 3 Fees.

#### **5. School Fees**

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

The School District currently collects such fees in the amount of \$0.364 per square foot. In the previous five (5) years, the School District collected approximately \$585,438 in School Fees from commercial/industrial development. A similar amount of commercial/industrial School Fees can be expected to be received over the following five (5) years. This potential funding will be discussed further below.

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

As stated in Section III.B, the School District currently has 153 unhoused students from existing residential units. Based on per-student costs calculated in Exhibit E, these existing unhoused students have a cost impact to the School District of \$7,605,018.

Over the next five (5) years, the School District will also need to construct school facilities to house students to be generated from Future Units. Using per-student costs calculated in Exhibit E, providing adequate school facilities to the 89 Projected Unhoused Students identified in Section III.C will have a cost of \$3,543,166. Table L-1 shows a summary of the school facilities needs of the School District.

**Table L-1  
Identification of School Facilities Needs (2018\$)**

<b>Item</b>	<b>Amount</b>
Current Unhoused Student Impact	\$7,605,018
Future Unhoused Student Impact	\$3,543,166
<b>Total</b>	<b>\$11,148,184</b>

As stated above, the School District has identified the following local funds: (i) a potential for \$485,305 in funding from redevelopment pass-through agreements, (ii) potential commercial/industrial school fees in the amount of \$585,438, and (iii) a potential value of surplus sites in the amount of \$449,738. In addition, the School District also plans to pursue State funding for the construction of school facilities to adequately house students generated from existing residential development and Future Units. Based on the current per-pupil grant amounts established by the State and the School District's site costs, the 153 existing unhoused students would generate \$2,613,468 in State funding and the 89 Projected Unhoused Students would generate \$1,358,959 in State funding. Additionally, based on Table 17 of the Analysis, the School District can expect to receive \$1,358,959 from Alternative No. 2 Fees on new residential development. Table L-2 summarizes potential funding sources to fund the school facilities needs identified in Table L-1.

**Table L-2**  
**Identification of Local Funds (2018\$)**

<b>Item</b>	<b>Amount</b>
Projected Redevelopment Revenues	\$485,305
Projected Commercial/Industrial School Fees	\$585,438
Potential Value of Surplus School Sites	\$449,738
State Funding for Current Unhoused Students	\$2,613,468
State Funding for Projected Unhoused Students	\$1,358,959
Projected Alternative No. 2 Fees	\$1,358,959
<b>Total</b>	<b>\$6,851,867</b>

As shown in Table L-3, when considering the current and future school needs of the School District, there is currently a \$4,296,317 funding shortfall. Therefore, the School District does not have surplus funds available to offset the cost impact of Future Units.

**Table L-3**  
**Identification of Funding Shortfall (2018\$)**

<b>Item</b>	<b>Amount</b>
School Facilities Needs	\$11,148,184
Local Funding Sources	(\$6,851,867)
<b>Remaining Funding Shortfall</b>	<b>\$4,296,317</b>

**EXHIBIT M**

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

## **RICHLAND SCHOOL DISTRICT**

### **General Site Development Grant per Student Calculation**

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

<b>School Level</b>	<b>Base Per-Pupil Grant <sup>[1]</sup></b>	<b>Percent</b>	<b>Additional Grant</b>
Elementary School	\$11,775	6.00%	\$707
Middle School	\$12,483	6.00%	\$749
<i>[1] Includes Automatic Fire Detection/Sprinkler Grant.</i>			

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

<b>School Level</b>	<b>Grant per New Usable Acre</b>	<b>Site Size</b>	<b>Grant per School Facility</b>
Elementary School	\$18,827	9.2	\$173,208
Middle School	\$18,827	18.4	\$346,417

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

<b>School Level</b>	<b>Grant per School Facility</b>	<b>Facility Capacity</b>	<b>Grant per Student</b>
Elementary School	\$173,208	650	\$266
Middle School	\$346,417	750	\$462

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

<b>School Level</b>	<b>Additional Grant as a percentage of Base Per-Pupil Grant</b>	<b>Grant per Student</b>	<b>Total Grant for General Site Development</b>
Elementary School	\$707	\$266	\$973
Middle School	\$749	\$462	\$1,211