

School Facilities Needs Analysis

San Bernardino City Unified School District

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Exhibits

| | |
|-------------------|---|
| Exhibit A: | Current SAB Form 50-01 |
| Exhibit B: | Current SAB Form 50-02 |
| Exhibit C: | Current SAB Form 50-03 |
| Exhibit D: | Eligibility Determination from the SAB |
| Exhibit E: | Summary of School Facility Planning Policies and Estimates of Actual School Facility Costs |
| Exhibit F: | Verification of Multi-track Year-Round Education |
| Exhibit G: | Bonding Capacity Calculation |
| Exhibit H: | Correspondence with the Cities and County |
| Exhibit I: | Facilities Cost Impacts of Reconstruction |
| Exhibit J: | School Facilities Capacity Calculation |
| Exhibit K: | Allocation of Surplus Seats |
| Exhibit L: | Surplus Site Determination |
| Exhibit M: | Identification and Consideration of Local Funding Sources per Section 65995.5(c)(2) and Section 65995.6(b)(3) |
| Exhibit N: | 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 San Bernardino City Unified 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 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 new 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**

| Statutory Requirements | Status |
|---|----------------|
| Substantial enrollment as defined in Section 65995.5(b)(3)(A) of its students on a multi-track year-round calendar | Met |
| Placed at least one (1) general obligation 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 | Not Met |
| 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) | Met |
| At least 20 percent of the teaching stations are relocatable classrooms | Met |

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 determined in accordance with the facts herein and applicable law are set forth in Table ES-2.

**Table ES-2
Alternative Fees (2011\$)**

| Fee | Amount per Square Foot |
|----------------------|-------------------------------|
| Alternative No.2 Fee | \$5.19 |
| Alternative No.3 Fee | \$12.58 |

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 in writing. 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 twelve (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.

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 the Alternative No. 2 Fee will be required as provided in Section 65995.5(a) if the SAB is approving apportionments for new construction funding, and the Alternative No. 3 Fee will be required as provided in Section 65995.7(a) if the SAB is not approving apportionments for new construction funding, and subject to the suspension of Alternative No. 3 Fees as set forth in Section 65995.7(a)(2).

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 meet all applicable requirements, including having been determined by the SAB to be eligible for new construction funding under the SFP or requesting such a determination from the SAB 120 days prior to adopting any Alternative Fees.

Statutory Requirements

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

1. A school district has a Substantial Enrollment of its students on a multi-track year-round calendar;
2. A school district has placed at least one (1) general obligation 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 ("SGRs") 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, middle or junior high school, and high school). If surplus seats exist at one (1) or more school levels, a school district must determine what portion of the excess seats, if any, are available to accommodate the Projected Student Enrollment. The determination may include such considerations as: matriculation of existing students, advanced 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 as reported each October to the California Basic Educational Data System ("CBEDS").

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, that 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 include 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 Sections 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 California Department of Education ("CDE") 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 estimate 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 report(s), 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 such amount may exclude reductions for available local resources and funds identified and dedicated in accordance with Section 65995.7(a).

II. Eligibility to Adopt Alternative Fees

Section 65995.5 requires that the School District (i) be deemed 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. below provides an evaluation of the eligibility of the School District for new construction funding under the SFP and Section II.B. below documents the satisfaction of at least two (2) of the Statutory Requirements by the School District.

A. Eligibility to Receive State Funds

Section 65995.5(b)(1) provides that the School District must make a timely application to the SAB for new construction funding and (i) be determined by the SAB to meet the eligibility requirements for new construction funding or (ii) be deemed eligible if the SAB fails to notify the School District of its eligibility within 120 days of receipt of the application. The School District filed SAB Forms 50-01, 50-02, and 50-03 and requested an Eligibility Determination as required by the SFP on June 3, 1999. On December 8, 1999, the Eligibility Determination of the School District was approved by the SAB. Subsequently, the School District updated SAB Forms 50-01, 50-02, and 50-03 to reflect receipt of State funds, as well as changes to its enrollment and to SAB regulations. The current SAB Forms 50-01, 50-02, and 50-03 are incorporated herein as Exhibits A, B, and C, respectively. As shown on the most current Eligibility Determination from the SAB (Exhibit D), the School District is eligible for zero (0) students in grades kindergarten through 6, zero (0) students in grades 7 and 8, zero (0) students in grades 9 through 12, 84 non-severe special day class students, and zero (0) severe special day class students of new construction funding under the SFP.

B. Statutory Requirements

The School District must satisfy two (2) of the Statutory Requirements in order to levy Alternative Fees. The following data establishes that at least two (2) of the Statutory Requirements are met by the School District in school year 2010/2011.

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 been satisfied. This determination is based on the School District reporting a total of 28,173 students in grades kindergarten through 6. Of these 28,173 students, the School District identified 14,351 students in grades kindergarten through 6 currently on multi-track year-round education. This equates to 50.9 percent of its students in grades kindergarten through 6 that are currently on a multi-track year-round schedule. (See Exhibit F for the Verification of Multi-track Year-Round Education).

2. General Obligation Bond Measure

This Statutory Requirement is met if the School District has placed at least one (1) general obligation 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.

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 general fund of the School District may be included.

The School District has determined that this Statutory Requirement has been satisfied. To date, the School District has \$163,690,281 in outstanding general obligation bond debt, which represents 57.3 percent of its bonding capacity (see Exhibit G for a calculation of the bonding capacity of the School District).

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. This determination is based on the School District currently having a total of 1,406 permanent classrooms and 1,002 relocatable classrooms. This equates to a 41.61 percent relocatable classroom utilization rate.

C. Eligibility to Adopt 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 impose Alternative Fees as provided by applicable law as of the date the Analysis is adopted.

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 SGRs of residential units constructed in the School District during the previous five (5) years of a type similar to that of the Future Units. Section III.A. below calculates the Projected Student Enrollment. Section III.B. sets forth the relevant facts as to 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. Using residential data obtained from the County of San Bernardino ("County") Office of the Assessor ("Assessor"), Dolinka Group, LLC ("Dolinka Group") compiled a database containing the addresses of the units that meet 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.

Based on year built information provided by the County Assessor, a total of 1,503 SFD units in the School District were identified as meeting the criteria stated above. Dolinka Group then obtained a database of all students within the School District in school year 2010/2011. Upon comparison of the two (2) databases, 1,034 students matched to the 1,503 SFD units, resulting in the following SGRs for SFD units.

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

| School Level | Number of Students Matched | Number of SFD Units | Student Generation Rates |
|--------------------------------|-----------------------------------|----------------------------|---------------------------------|
| Elementary School (Grades K-5) | 460 | 1,503 | 0.3061 |
| Middle School (Grades 6-8) | 272 | 1,503 | 0.1810 |
| High School (Grades 9-12) | 302 | 1,503 | 0.2009 |
| Total | 1,034 | N/A | 0.6880 |

Note: While the School District operates a number of elementary schools that serve grades K-6, the School District has chosen to configure future elementary and middle schools as shown above for future planning purposes.

SGRs for SFA and MF units could not be calculated by Dolinka Group due to the lack of units of these types constructed in the School District over the last five (5) years. However, the construction of SFA and MF units is expected to occur in the next five (5) years in the School District. Therefore, the Analysis has employed the portion of Section 65995.6(a) that permits a school district to use SGRs of new residential units of a similar type constructed over the previous five (5) years in the city or county in which the school district is located. Consistent with the methodology utilized in the past, the Analysis has determined that the SGRs recently experienced by Rialto Unified School District ("RUSD"), a school district located in the County, are best representative of the SGRs expected in the School District for SFA and MF units to be constructed in the next five (5) years. This is due to a similar demographic and urban profile that RUSD and the School District share in terms of the major urban centers they serve and the large urban populations contained within. In the future, as SFA and MF units are constructed, the School District will calculate SGRs for these unit types. Table 2 shows the SGRs used for SFA and MF units.

**Table 2
Student Generation Rates for
Single Family Attached Units and Multifamily Units**

| School Level | Student Generation Rates for SFA Units^[1] | Student Generation Rates for MF Units^[1] |
|---------------------|---|--|
| Elementary School | 0.4300 | 0.4300 |
| Middle School | 0.2400 | 0.2400 |
| High School | 0.2100 | 0.2100 |
| Total | 0.8800 | 0.8800 |

[1] Source: SFNA, Rialto Unified School District, adopted June 9, 2010.

2. Future Units

In order to estimate the amount of Future Units that could be constructed within the School District over the next five (5) years, Dolinka Group contacted the Planning Departments of the Cities and County (see Exhibit H for Dolinka Group's correspondence with the Cities and County). Based on these sources, Dolinka Group has estimated that the School District could experience the construction of 747 additional residential units over the next five (5) years (please refer to the map on the following page for a geographic profile of the School District). Of these 747 additional residential units, 426 are expected to be SFD units, 100 are expected to be SFA units and 221 are expected to be MF units. It should be noted that these projections represent the best available information at this time provided by the Planning Departments of the Cities and the County as to what will actually be constructed based on documents submitted to these municipalities. For this reason and because of different requirements created by statute and regulations, these projections are independent of the projected residential development reported to the State in the SAB Form 50-01. Table 3 below shows Future Units by unit type.

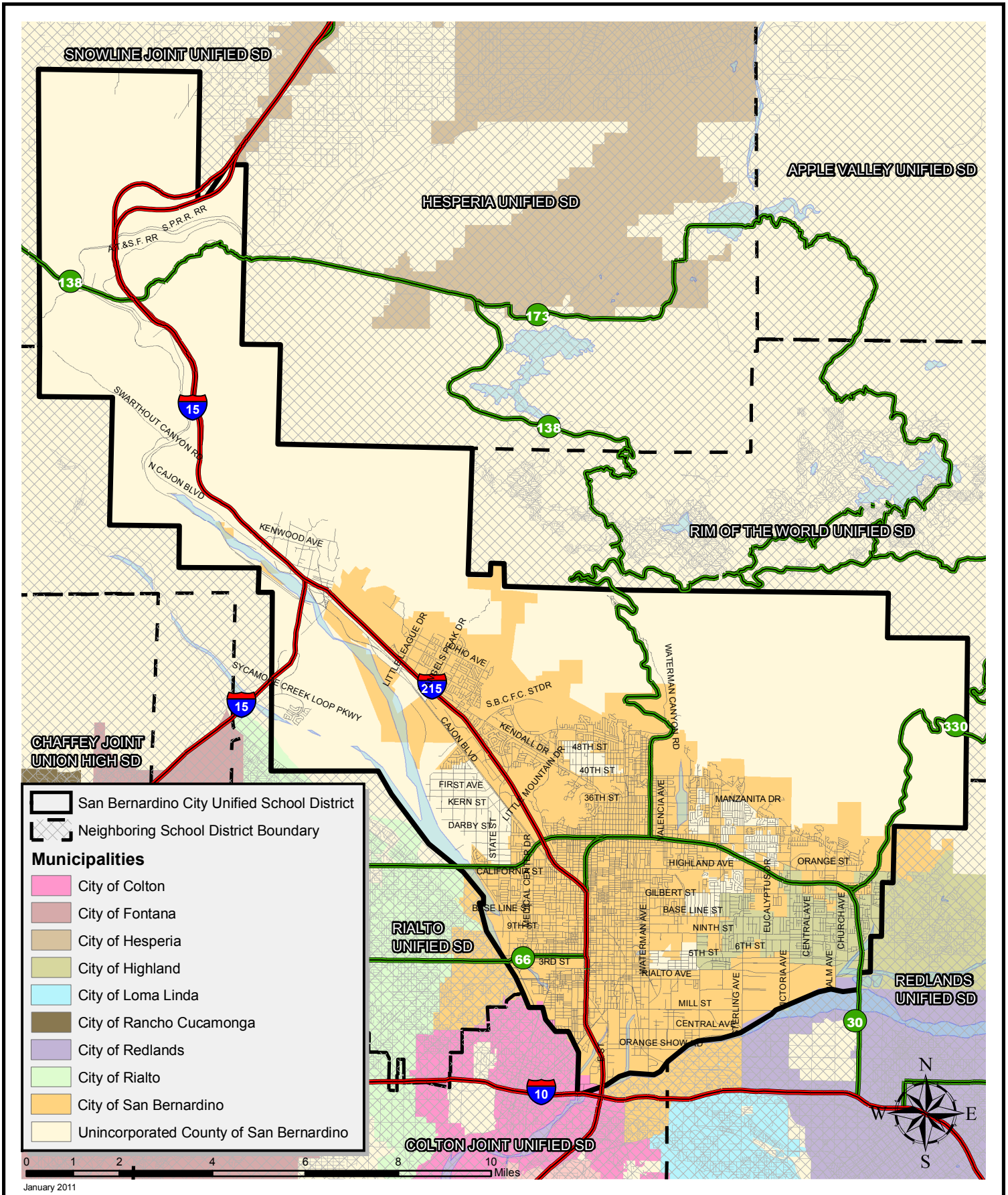
Table 3
Future Units by Unit Type

| Unit Type | Number of Units |
|------------------------|------------------------|
| Single Family Detached | 426 |
| Single Family Attached | 100 |
| Multifamily | 221 |
| Total | 747 |

In addition, Dolinka Group has identified that some existing residential units could be voluntarily demolished in order to be replaced by new residential development ("Reconstruction"). For additional information regarding the facilities cost impacts of Reconstruction, including the demolition of commercial/industrial construction and the replacement with new residential units, please refer to Exhibit I.

SAN BERNARDINO CITY UNIFIED SCHOOL DISTRICT

GEOGRAPHIC PROFILE



January 2011

3. Projected Student Enrollment

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

**Table 4
Projected Student Enrollment
Generated from Future Units**

| School Level | Projected Student Enrollment |
|-------------------|------------------------------|
| Elementary School | 268 |
| Middle School | 154 |
| High School | 153 |
| Total | 575 |

B. **Excess Capacity**

Collectively, after apportioning non-severe and severe special education seats among the three (3) school levels and adding in State-funded capacity, the educational facilities of the School District in school year 2010/2011 have a capacity of 54,480 students, according to Section 17071.10 of the Education Code. (See Exhibit J for more information regarding the capacity calculation). It should be noted that when apportioning this capacity, the school level configuration of the School District has been altered to grades K through 6 at the elementary school level and grades 7 and 8 at the middle school level in order to be consistent with the SAB Form 50-02. Therefore, of these 54,480 seats, 31,177 were at the adjusted elementary school level, 8,650 were at the adjusted middle school level, and 14,653 were at the high school level. Based on enrollment data from CBEDS, the enrollment of the School District in school year 2010/2011 is 50,070 students. As shown in Table 5, facilities capacity exceeds student enrollment of the School District by 3,004 seats at the elementary school level, 1,161 seats at the middle school level, and 245 seats at the high school level in school year 2010/2011.

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

| School Level | 2010/2011 Facilities Capacity ^[1] | 2010/2011 Student Enrollment ^[2] | Excess Capacity/ (Shortage) |
|--------------------------------|--|---|-----------------------------|
| Elementary School (Grades K-6) | 31,177 | 28,173 | 3,004 |
| Middle School (Grades 7-8) | 8,650 | 7,489 | 1,161 |
| High School (Grades 9-12) | 14,653 | 14,408 | 245 |
| Total | 54,480 | 50,070 | 4,410 |

[1] SAB Form 50-02 (Exhibit B) plus additional state funded capacity (Exhibit J).

[2] 2010 CBEDS.

Note: The School District's school level configuration has been altered in this section to be consistent with SAB Form 50-02.

C. Projected Unhoused Students

As shown in Table 5, the existing facilities capacity of the School District determined in accordance with Section 65995.6(a) exceeds the student enrollment currently being generated from existing residential units by 3,004 seats at the elementary school level, 1,161 seats at the middle school level, and 245 seats at the high school level. Dolinka Group allocated the surplus seats between students to be generated from residential units to be constructed over the next five (5) years and students to be generated from residential units constructed beyond five (5) years. This resulted in 131 surplus elementary school seats, 51 surplus middle school seats, and 10 surplus high school seats being allocated to units constructed over the next five (5) years. Table 6 shows the Projected Unhoused Students from Future Units at each school level, while Exhibit K provides more information regarding the allocation of surplus seats.

Table 6
Projected Unhoused Students from Future Units

| School Level | Projected Student Enrollment | Surplus Seat Determination | Projected Unhoused Students |
|---------------------|-------------------------------------|-----------------------------------|------------------------------------|
| Elementary School | 268 | 131 | 137 |
| Middle School | 154 | 51 | 103 |
| High School | 153 | 10 | 143 |
| Total | 575 | 192 | 383 |

IV. Surplus Property and Existing Surplus Local Funds

Section 65995.6(b) states that a 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 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 which may be considered surplus property (for more details see Exhibit L).

As for identifying and considering existing excess capacity that could accommodate the Projected Unhoused Students generated from Future Units, Section III.C. illustrates that the School District has considered and determined that 131 excess seats exist at the elementary school level, 51 excess seats exist at the middle school level, and 10 excess seats exist at the high school level. Finally, in accordance with Section 65995.5(c)(2) and 65995.6(b)(3), the School District has determined that local sources in the amount of \$2,402,328 are available to finance the construction or reconstruction of school facilities needed to accommodate any growth in enrollment attributable to Future Units (see Exhibit M 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 amount of Alternative No. 2 Fee and 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 Projected Unhoused Students generated from 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 and adjusted by the SAB on January 27, 2010, 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 (2011\$)

| School Level | Per-Pupil Grant Amount | Additional Grants for Auto Alarm and Fire Sprinkler System | Base Per-Pupil Grant Amount |
|-------------------|------------------------|--|-----------------------------|
| Elementary School | \$8,738 | \$157 | \$8,895 |
| Middle School | \$9,241 | \$189 | \$9,430 |
| High School | \$11,757 | \$204 | \$11,961 |

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 3.75 percent of the base per-pupil grant for high school projects, and (ii) a grant of \$14,200 per new useable acre acquired for new school construction. To determine the general site development grant for each school level, Dolinka Group first applied the percentages mentioned above to the base per-pupil grant amounts shown in Table 7. Second, Dolinka Group applied the grant per new useable acre mentioned above to the student capacity of future school facilities and corresponding site size requirements for the School District listed in Table 10 below to derive a grant amount per student. (See Exhibit N for more information on the calculation of additional grants for general site development). Table 8 shows these additional grants as well as the total per-pupil grant amount.

**Table 8
Per-Pupil Grant Amounts (2011\$)**

| School Level | Base Per-Pupil Grant Amount | Additional Grants for General Site Development | Total Per-Pupil Grant Amount |
|---------------------|------------------------------------|---|-------------------------------------|
| Elementary School | \$8,895 | \$701 | \$9,596 |
| Middle School | \$9,430 | \$802 | \$10,232 |
| High School | \$11,961 | \$724 | \$12,685 |

The understanding of the School District is that applicable law specifies that 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. The intent of the School District is to use the amount permissible by applicable law.

2. Total New School Construction Grants

To determine the total new school construction grants under Section 65995.5, the number of Projected Unhoused Students generated from Future Units, as shown in Table 6, is multiplied by the total per-pupil grant amounts set forth in Sections 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 Future Units (2011\$)
(In Accordance with Section 65995.5(c)(1) of the Government Code)**

| School Level | Projected Unhoused Students from Future Units | Total Per-Pupil Grant Amount | Total New School Construction Grants |
|---------------------|--|-------------------------------------|---|
| Elementary School | 137 | \$9,596 | \$1,314,652 |
| Middle School | 103 | \$10,232 | \$1,053,896 |
| High School | 143 | \$12,685 | \$1,813,955 |
| Total | 383 | N/A | \$4,182,503 |

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, the School District must determine the student capacity of future school facilities that will be needed to accommodate the Projected Unhoused Students generated from Future Units, as well as students to be generated from mitigated Future Units and residential development anticipated to occur beyond the next five (5) years. Based on the educational programs of the School District, future elementary schools will be designed to accommodate 900 students, future middle schools will be designed to accommodate 1,600 students, and future high schools will be designed to accommodate 2,400 students. Based on these capacities, the guidelines included in the "School Site Analysis and Development Handbook" published by the CDE 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**

| School Level | Student Capacity | Site Size |
|---------------------|-------------------------|------------------|
| Elementary School | 900 | 10.60 |
| Middle School | 1,600 | 26.60 |
| High School | 2,400 | 46.50 |

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

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

The School District believes that a reasonable estimate for site acquisition is \$902,574 per acre at all school levels. This estimate is based on the October 2009 appraised cost of land at the Alessandro II school site. Dolinka Group analyzed information from DataQuick which indicated property values for the City of San Bernardino have not changed since the date of the appraisal, therefore, the site acquisition cost is reasonable and consistent with current market conditions. As for site development, the School District believes a reasonable estimate is \$374,034 per acre at all school levels. This estimate is based on the combined service site, off-site, and utility service costs approved by OPSC for the Alessandro II school site. Table 11 lists the total estimated site acquisition costs and site development costs of the School District for each school level.

**Table 11
Site Acquisition and Site Development Costs
of Future School Facilities (2011\$)**

| School Level | Site Acquisition Cost^[1] | Site Development Cost^[1] | Total Site Cost |
|---------------------|--|--|------------------------|
| Elementary School | \$9,567,284 | \$3,964,760 | \$13,532,044 |
| Middle School | \$24,008,468 | \$9,949,304 | \$33,957,772 |
| High School | \$41,969,691 | \$17,392,581 | \$59,362,272 |
| Total | \$75,545,443 | \$31,306,645 | \$106,852,088 |

[1] The site acquisition and site development costs are equal to the per acre costs listed above multiplied by the number of acres listed in Table 10.

c. School Facilities Needed

To ensure that 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 generated from Future Units, the School District must identify the number of future school facilities that will be needed to house the Projected Unhoused Students generated from Future Units as well as students to be generated from residential development anticipated to occur beyond the next five (5) years. To calculate the number of school facilities that the District will need to adequately house the Projected Unhoused Students generated from Future Units, the number of Projected Unhoused Students generated from Future Units, as listed in Table 6, was divided by the applicable student capacity, as listed in Table 10. The number of school facilities expected to be needed to house the Projected Unhoused Students generated from Future Units is shown in Table 12.

**Table 12
School Facilities Needed**

| School Level | Projected Unhoused Students from Future Units | Facility Capacity | Total Facilities Needed |
|---------------------|--|--------------------------|--------------------------------|
| Elementary School | 137 | 900 | 0.152 |
| Middle School | 103 | 1,600 | 0.064 |
| High School | 143 | 2,400 | 0.060 |

It is important to realize that while the number of Projected Unhoused Students generated from Future Units equates to approximately 15.2 percent of an elementary school, 6.4 percent of a middle school, and 6.0 percent of a high school, the School District will need to construct at least one (1) elementary school, one (1) middle school, and one (1) high school in the future to accommodate students generated from residential units constructed 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. The calculation of this first step is shown in Table 13.

**Table 13
Total School Site Acquisition and Site
Development Costs Generated from Future Units (2011\$)**

| School Level | Facilities Needed for Students Generated from Future Units | Site Cost | Total Site Cost |
|-------------------|--|--------------|--------------------|
| Elementary School | 0.152 | \$13,532,044 | \$2,056,871 |
| Middle School | 0.064 | \$33,957,772 | \$2,173,297 |
| High School | 0.060 | \$59,362,272 | \$3,561,736 |
| Total | N/A | N/A | \$7,791,904 |

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 50 percent to arrive at the Alternative No. 2 Fee Site Costs. The calculation of this step is shown in Table 14.

**Table 14
Alternative No. 2 Fee Site Costs (2011\$)
(In Accordance with Section 65995.5(h) of the Government Code)**

| School Level | Total Site Costs | Multiplier | Alternative No. 2 Fee Site Costs |
|-------------------|------------------|------------|----------------------------------|
| Elementary School | \$2,056,871 | 50.00% | \$1,028,436 |
| Middle School | \$2,173,297 | 50.00% | \$1,086,649 |
| High School | \$3,561,736 | 50.00% | \$1,780,868 |

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

As stated above, the initial step in calculating the maximum Alternative No. 2 Fee is to identify (i) the total new school construction grants and (ii) the site acquisition and site 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 calculation of the Alternative No. 2 Fee before any local sources, including Local Funds, are applied. As shown in Table 9, the new school construction grants total \$4,182,503 and as shown in Table 14, the total site acquisition and site development costs are \$3,895,953. The Alternative No. 2 Fee School Facility Costs are shown in Table 15.

Table 15
Alternative No. 2 Fee School Facility Costs (2011\$)
(In Accordance with Section 65995.5(c)(1) of the Government Code)

| School Level | Total New Construction Grants | Alternative No. 2 Fee Site Costs | Alternative No. 2 Fee School Facility Costs |
|---------------------|--------------------------------------|---|--|
| Elementary School | \$1,314,652 | \$1,028,436 | \$2,343,088 |
| Middle School | \$1,053,896 | \$1,086,649 | \$2,140,545 |
| High School | \$1,813,955 | \$1,780,868 | \$3,594,823 |
| Total | \$4,182,503 | \$3,895,953 | \$8,078,456 |

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 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 local sources in the amount of \$2,402,328 are 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 (2011\$)
(In Accordance with Section 65995.5(c)(2) of the Government Code)

| Item | Amounts |
|--|--------------------|
| Alternative No. 2 Fee School Facilities Costs | \$8,078,456 |
| Credit for Existing Surplus Local Funds | \$2,402,328 |
| Net Alternative No. 2 Fee School Facilities Costs | \$5,676,128 |

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 of the Future Units.

1. Average Square Footage per Unit

In order to project the total square footage of assessable space of the Future Units, the Analysis must estimate the average square footage of Future SFD Units and Future SFA Units. Based on information provided by the Cities and County, Dolinka Group determined that the average square footage estimates are 1,870 for Future SFD Units, 1,200 square feet for Future SFA Units, and 800 square feet for Future MF units (see Exhibit H for Dolinka Group's correspondence with the Cities and County).

2. Total Square Footage of Assessable Space

To calculate the total square footage of assessable space of the Future Units, the average square footage amounts for Future SFD Units, Future SFA Units, and Future MF units listed above were multiplied by the number of Future Units listed in Table 3. The results of this operation are shown in Table 17.

**Table 17
Estimated Total Square Footage of Future Units**

| Unit Type | Future Units | Average Square Footage | Total Square Footage |
|------------------------|---------------------|-------------------------------|-----------------------------|
| Single Family Detached | 426 | 1,870 | 796,620 |
| Single Family Attached | 100 | 1,200 | 120,000 |
| Multifamily | 221 | 800 | 176,800 |
| Total | 747 | N/A | 1,093,420 |

It should be noted that the total assessable square footage calculated in Table 17 includes that of units which may be constructed as a result of Reconstruction. For more information on Reconstruction, please see Exhibit I.

3. Calculation of Alternative No. 2 Fee

To calculate the Alternative No. 2 Fee, which may be established by the School District only during periods when the State does have new construction funding available, the Net Alternative No. 2 Fee School Facility Costs, listed in Table 15, were divided by the total square footage of assessable space of the Future Units, 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 (2011\$)**

| Item | Amounts |
|---|----------------|
| Net Alternative No. 2 Fee School Facilities Costs | \$5,676,128 |
| Total Residential Square Footage | 1,093,420 |
| Alternative No. 2 Fee | \$5.19 |

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, subject to the temporary suspension of Alternative No. 3 fees by Section 65995.7(a)(2). Additionally, by 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 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, 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 calculation of 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 specified by Section 65995.7, this amount has been reduced by the amount local sources, including Local Funds, (\$2,402,328 in the case of the School District) identified pursuant to Section 65995.5(c)(2) and Section 65995.6(b). 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 18. The result, shown in Table 19, is the Alternative No. 3 Fee School Facility Costs.

Table 19
Alternative No. 3 Fee School Facility Costs (2011\$)
(In Accordance with Section 65995.7 of the Government Code)

| Item | Amounts |
|--|---------------------|
| Net Alternative No. 2 Fee School Facilities Costs | \$5,676,128 |
| Alternative No. 2 Fee School Facility Costs | \$8,078,456 |
| Alternative No. 3 Fee School Facility Costs | \$13,754,584 |

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 Future Units listed in Table 17. This calculation is required by Section 65995.5(c)(3). Table 20 provides the Alternative No. 3 Fee that can be levied by the School District on new residential development where permitted by applicable law.

Table 20
Alternative No. 3 Fee (2011\$)

| Item | Amounts |
|---|----------------|
| Alternative No. 3 School Facilities Costs | \$13,754,584 |
| Total Residential Square Footage | 1,093,420 |
| Alternative No. 3 Fee | \$12.58 |

VII. Section 66000 of the Government Code

Sections 66000, et seq. were enacted by the State in 1987. 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 five (5) or more years after it was collected.

Additional 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 or direction is given by statute as to the costs permissible to include. The Alternative No. 2 Fee of \$5.19 per square foot and the Alternative No. 3 Fee of \$12.58 per square foot are justified in the Analysis. The estimated actual cost to the School District as referred to in Exhibit E is \$36.47 per square foot. As the estimated actual cost to accommodate future pupils is greater than the Alternative Fees, it is reasonable for the School District to determine that the Alternative No. 2 Fee of \$5.19 per square foot and the Alternative No. 3 Fee of \$12.58 per square foot are roughly proportional and reasonably related to the use and need therefore relative to the type of development on which the Alternative Fees are imposed.

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. Further, as determined in Exhibit I, which reviewed the potential impact of Reconstruction, it has been determined that the impact of such units is greater than the Alternative Fees identified herein. The School District, therefore, is justified in levying Alternative Fees on all new development, including Reconstruction.

By way of summary, the Alternative Fees will be used to fund (i) new school facilities, (ii) expansion of existing school facilities, and (iii) other upgrades to existing school facilities, but only to the extent that such items are needed to accommodate the Projected Unhoused Students generated from Future Units and to the extent that the use of the Alternative Fees on such items is permitted by applicable law.

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Exhibit A

Current SAB Form 50-01

ENROLLMENT CERTIFICATION/PROJECTION

SAB 50-01 (REV 06/08)

| | |
|--|---|
| SCHOOL DISTRICT San Bernardino City Unified School District | FIVE DIGIT DISTRICT CODE NUMBER (see California Public School Directory) 67876 |
| COUNTY San Bernardino | HIGH SCHOOL ATTENDANCE AREA (HSAA) OR SUPER HSAA (if applicable) |

Check one: Fifth-Year Enrollment Projection Tenth-Year Enrollment Projection

HSAA Districts Only - Check One: Attendance Residency
 Residency - COS Districts Only - (Fifth Year Projection Only)

Modified Weighting (Fifth-Year Projection Only)
 Alternate Weighting - (Fill in boxes to the right):

| | | |
|------------------------|--------------------|---------------------|
| 3rd Prev. to 2nd Prev. | 2nd Prev. to Prev. | Previous to Current |
| 1 | 14 | 16 |

Part G. Number of New Dwelling Units
(Fifth-Year Projection Only) 2,179

Part H. District Student Yield Factor
(Fifth-Year Projection Only) 0.7000

Part A. K-12 Pupil Data

| Grade | 7th Prev. 2003/04 | 6th Prev. 2004/05 | 5th Prev. 2005/06 | 4th Prev. 2006/07 | 3rd Prev. 2007/08 | 2nd Prev. 2008/09 | Previous 2009/10 | Current 2010/11 |
|--------------|-------------------|-------------------|-------------------|-------------------|-------------------|-------------------|------------------|-----------------|
| K | 4409 | 4509 | 4450 | 4411 | 4323 | 4048 | 4083 | 4170 |
| 1 | 4729 | 4893 | 4816 | 4698 | 4604 | 4366 | 4225 | 4263 |
| 2 | 4744 | 4641 | 4687 | 4523 | 4360 | 4179 | 4117 | 4105 |
| 3 | 4731 | 4735 | 4495 | 4498 | 4292 | 4126 | 4081 | 4030 |
| 4 | 4823 | 4771 | 4631 | 4291 | 4365 | 4065 | 4060 | 3975 |
| 5 | 4592 | 4874 | 4584 | 4468 | 4171 | 4158 | 3973 | 3912 |
| 6 | 4520 | 4625 | 4683 | 4356 | 4236 | 3891 | 3936 | 3767 |
| 7 | 4302 | 4568 | 4451 | 4364 | 4144 | 4024 | 3667 | 3781 |
| 8 | 4287 | 4370 | 4381 | 4282 | 4247 | 3991 | 3924 | 3617 |
| 9 | 5778 | 6205 | 6767 | 6876 | 6629 | 3993 | 3818 | 3669 |
| 10 | 3470 | 3278 | 3197 | 3308 | 3275 | 3756 | 3796 | 3538 |
| 11 | 2435 | 2435 | 2408 | 2508 | 2463 | 3350 | 3478 | 3230 |
| 12 | 1904 | 1948 | 1962 | 1945 | 2091 | 3158 | 3005 | 3083 |
| TOTAL | 54724 | 55852 | 55512 | 54528 | 53200 | 51105 | 50163 | 49140 |

Part I. Projected Enrollment

1. Fifth-Year Projection

Enrollment/Residency - (except Special Day Class pupils)

| K-6 | 7-8 | 9-12 | TOTAL |
|-------|------|-------|-------|
| 30854 | 6948 | 11929 | 49731 |

Special Day Class pupils only - Enrollment/Residency

| | Elementary | Secondary | TOTAL |
|--------------|------------|------------|-------|
| Non-Severe | 300 | 322 | 622 |
| Severe | 433 | 463 | 896 |
| TOTAL | 733 | 785 | |

2. Tenth-Year Projection

Enrollment/Residency - (except Special Day Class pupils)

| K-6 | 7-8 | 9-12 | TOTAL |
|-----|-----|------|-------|
| | | | |

Special Day Class pupils only - Enrollment/Residency

| | Elementary | Secondary | TOTAL |
|--------------|------------|-----------|-------|
| Non-Severe | | | |
| Severe | | | |
| TOTAL | | | |

Part B. Pupils Attending Schools Chartered By Another District

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

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

| Grade | 7th Prev. | 6th Prev. | 5th Prev. | 4th Prev. | 3rd Prev. | 2nd Prev. | Previous | Current |
|--------------|------------|-------------|------------|------------|------------|------------|------------|------------|
| 9 | 131 | 235 | 113 | 132 | 75 | 0 | 4 | 0 |
| 10 | 301 | 382 | 198 | 187 | 168 | 10 | 19 | 2 |
| 11 | 300 | 365 | 154 | 201 | 182 | 133 | 117 | 161 |
| 12 | 163 | 245 | 68 | 78 | 113 | 421 | 397 | 343 |
| TOTAL | 895 | 1227 | 533 | 598 | 538 | 564 | 537 | 506 |

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

| | Elementary | Secondary | TOTAL |
|--------------|------------|------------|-------|
| Non-Severs | 280 | 379 | 659 |
| Severe | 404 | 545 | 949 |
| TOTAL | 684 | 924 | |

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

| 7th Prev. | 6th Prev. | 5th Prev. | 4th Prev. | 3rd Prev. | 2nd Prev. | Previous | Current |
|-----------|-----------|-----------|-----------|-----------|-----------|----------|---------|
| 2003/04 | 2004/05 | 2005/06 | 2006/07 | 2007/08 | 2008/09 | 2009/10 | 2010/11 |
| | | | | | | | |

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

County Birth Data Birth Data by District Zip Codes Estimate Estimate Estimate

| 8th Prev. | 7th Prev. | 6th Prev. | 5th Prev. | 4th Prev. | 3rd Prev. | 2nd Prev. | Previous | Current |
|-----------|-----------|-----------|-----------|-----------|-----------|-----------|----------|---------|
| 29696 | 30824 | 31194 | 33075 | 34675 | 35193 | 33788 | N/A | N/A |

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

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

NAME OF DISTRICT REPRESENTATIVE (PRINT OR TYPE)
Wael Elatar

SIGNATURE OF DISTRICT REPRESENTATIVE

DATE
11/30/10

TELEPHONE NUMBER
909-388-6100

E-MAIL ADDRESS
Wael.Elatar@sbcusd.k12.ca.us

Exhibit B

Current SAB Form 50-02

STATE OF CALIFORNIA
EXISTING SCHOOL BUILDING CAPACITY

SAB 50-02 (Rev. 07/00) Excel (Rev. 08/15/2000)

STATE ALLOCATION BOARD
 OFFICE OF PUBLIC SCHOOL CONSTRUCTION

| | |
|---|--|
| SCHOOL DISTRICT SAN BERNARDINO CITY UNIFIED | FIVE DIGIT DISTRICT CODE NUMBER (see California Public School Directory) 67876 |
| SAN BERNARDINO | HIGH SCHOOL ATTENDANCE AREA (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 | 197 | 3 | 58 | | | 258 |
| 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 | -62 | 2 | 6 | | - | 70 |
| Line 6. Portable Classrooms owned by district | 290 | 35 | 83 | | | 408 |
| Line 7. Permanent Classrooms | 642 | 231 | 334 | 7 | 21 | 1,235 |
| Line 8. Total (Lines 1 through 7) | 1,191 | 271 | 481 | 7 | 21 | 1,971 |

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 | 62 | 2 | 6 | | | 70 |
| c. Part I, line 6 | 290 | 35 | 83 | | | 408 |
| d. Part I, line 7 | 642 | 231 | 334 | 7 | 21 | 1,235 |
| e. Total (a, b, c, & d) | 994 | 268 | 423 | 7 | 21 | 1,713 |

Option B.

| | K-6 | 7-8 | 9-12 | Non-Severe | Severe | Total |
|--|-------|-----|------|------------|--------|-------|
| a. Part I, line 8 | 1,191 | 271 | 481 | 7 | 21 | 1,971 |
| b. Part I, lines 1,2,5 and 6 (total only) | | | | | | 736 |
| c. 25 percent of Part I, line 7 (total only) | | | | | | 309 |
| d. Subtract c from b (enter 0 if negative) | 319 | 23 | 85 | | | 427 |
| e. Total (a minus d) | 872 | 248 | 396 | 7 | 21 | 1,544 |

PART III - Determination of Existing School Building Capacity

| | K-6 | 7-8 | 9-12 | Non-Severe | Severe |
|--------------------------------|--------|-------|--------|------------|--------|
| Line 1. Classroom capacity | 21,800 | 6,695 | 10,692 | 91 | 189 |
| Line 2. SER adjustment | | | | | |
| Line 3. Operational Grants | | | | | |
| Line 4. Greater of line 2 or 3 | | | | | |
| Line 5. Total of lines 1 and 4 | 21,800 | 6,695 | 10,692 | 91 | 189 |

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.

CONFIRMED
 CURRENT
 VERSION
 AT OPSC
 10-1-02

SIGNATURE OF DISTRICT REPRESENTATIVE

DATE

Michael R. [Signature]

1/24/06

Exhibit C

Current SAB Form 50-03

STATE OF CALIFORNIA
ELIGIBILITY DETERMINATION

SAB 50-03 (Rev. 07/00) Excel (Rev. 08/28/2000)

STATE ALLOCATION BOARD
 OFFICE OF PUBLIC SCHOOL CONSTRUCTION
 Page 4 of 4

SCHOOL DISTRICT: **SAN BERNARDINO CITY UNIFIED**
 FIVE DIGIT DISTRICT CODE NUMBER (see California Public School Directory): **67876**
 DISTRICT ADDRESS: **777 North F Street**
 HIGH SCHOOL ATTENDANCE AREA (if applicable):
 CITY: **San Bernardino, CA 92410**
 COUNTY: **SAN BERNARDINO**

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

| DISTRICT REPRESENTATIVE | TELEPHONE NUMBER | E-MAIL ADDRESS |
|-------------------------|-----------------------|----------------|
| Mike Perez | (909) 381-1238 | |
| DISTRICT REPRESENTATIVE | TELEPHONE NUMBER | E-MAIL ADDRESS |

Part II - New Construction Eligibility NEW ADJUSTED

| | K-6 | 7-8 | 9-12 | Non-Severe | Severe |
|--|--------|-------|--------|------------|--------|
| 1. Projected Enrollment (Part G, Form SAB 50-01) | 33,104 | 8,678 | 13,860 | 1,234 | 953 |
| Existing School Building Capacity (Part III, line 5 of Form SAB 50-02) | 21,800 | 6,696 | 10,692 | 91 | 189 |
| 3. New Construction Baseline Eligibility (line 1 minus line 2) | 11,304 | 1,982 | 3,168 | 1,143 | 764 |

Part III - Modernization Eligibility NEW ADJUSTED

SCHOOL NAME:

Option A

| | K-6 | 7-8 | 9-12 | Non-Severe | Severe |
|---|-----|-----|------|------------|--------|
| 1. Permanent classrooms at least 25 years old | | | | | |
| 2. Portable classrooms at least 20 years old | | | | | |
| 3. Total (lines 2 and 3) | | | | | |
| 4. Multiply line 4 by: 25 for K-6, 27 for 7-8 and 9-12; 13 for non-severe and 9 for severe | | | | | |
| 5. CBEDS enrollment at school | | | | | |
| 6. Modernization eligibility (lesser of the totals of line 5 or 6) | | | | | |

Option B

| | |
|---|----|
| 1. Permanent space at least 25 years old (report by classroom or square footage) | |
| 2. Portable space at least 20 years old (report by classroom or square footage) | |
| 3. Total (lines 2 and 3) | |
| 4. Remaining permanent and portable space (report by classroom or square footage) | |
| 5. Total (lines 4 and 5) | |
| 6. Percentage (divide line 4 by line 5) | 0% |

| | K-6 | 7-8 | 9-12 | Non-Severe | Severe |
|--|-----|-----|------|------------|--------|
| 7. CBEDS enrollment at school site | | | | | |
| 8. Modernization eligibility (multiply line 7 by each grade group on line 6) | | | | | |

I certify, as the District Representative, that the information reported on this form is true and correct and that:
 I am designated as an authorized district representative by the governing board of the district; and:
 A resolution or other appropriate documentation supporting this application under Chapter 12.5, Part 10, Division 1
 commencing with Section 17070.10, et seq., of the Education Code was adopted by the School District's Governing Board
 on _____; and,

CONFIRMED
 CURRENT
 VERSION
 AT OPSC
 10-1-03

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: *Michael P. [Signature]* DATE: **1/24/01**

Exhibit D

Eligibility Determination from the SAB



Public School Construction 

Wednesday, November 10, 2010

Project Tracking System: School Facility Program: Project Summary

District: San Bernardino City Unified **Application No:** 50/67876-00-000
District Rep: Mr. Wael Elatar **County:** San Bernardino

SAB 50-03 New Construction Eligibility Information

New Construction Baseline Eligibility

| Grade Level: | K - 6 | 7 - 8 | 9 - 12 | Non-Severe | Severe |
|----------------------------|-------|-------|--------|------------|--------|
| Established Eligibility: | 6964 | 1666 | 4368 | 0 | 0 |
| SAB Approvals/Adjustments: | -7097 | -3802 | -7287 | 84 | -175 |
| Remaining Eligibility: | -133 | -2136 | -2919 | 84 | -175 |

SAB 50-03 Eligibility Document Status/Dates

Status: PM Complete
Date Signed: 6/3/1999
Date Received: 6/3/1999
SAB Approval Date: 12/8/1999

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

OPSC Project Manager: Matthew Nakao
Telephone: (916) 375-4327
E-mail Address: matthew.nakao@dgs.ca.gov

[View Modernization Eligibility](#)

[Project Tracking Home](#)

[Back to Top of Page](#)

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The content found herein may not necessarily represent the views and opinions of the Schwarzenegger Administration.

Exhibit E

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

San Bernardino City Unified School District
School Facility Cost Impacts Per Residential Square Foot
January 2011

School Facility Costs

| School Level | Site Acquisition Cost | Construction Cost | Total Cost |
|-------------------|-----------------------|-------------------|---------------|
| Elementary School | \$25,209,578 | \$36,239,000 | \$61,448,578 |
| Middle School | \$28,863,155 | \$57,133,000 | \$85,996,155 |
| High School | \$69,531,566 | \$139,145,000 | \$208,676,566 |

Source: San Bernardino City USD, Facilities Department.

Costs Per Student

| School Level | Total Cost | Students Housed | Cost Per Student |
|-------------------|---------------|-----------------|------------------|
| Elementary School | \$61,448,578 | 900 | \$68,276 |
| Middle School | \$85,996,155 | 1,600 | \$53,748 |
| High School | \$208,676,566 | 2,400 | \$86,949 |

School Facility Cost Impacts Per Residential Unit

| School Level | Cost Per Student | Student Generation Rate | Cost Per Unit |
|--|------------------|-------------------------|-----------------|
| Elementary School | \$68,276 | 0.3588 | \$24,495 |
| Middle School | \$53,748 | 0.2062 | \$11,081 |
| High School | \$86,949 | 0.2048 | \$17,809 |
| Total School Facility Cost Impact | | | \$53,385 |
| Average Square Footage ^[1] | | | 1,464 |
| School Facility Cost Impact Per Square Foot | | | \$36.47 |

[1] See Table 17 of the Analysis.

Exhibit F

Verification of Multi-track Year-Round Education

**San Bernardino City Unified School District
Verification of Multi-track Year-Round Education (MTYRE)**

Student Enrollment at MTYRE Schools

| School Site | Total Enrollment |
|------------------------------|------------------|
| Bradley Elementary | 710 |
| Del Rosa Elementary | 765 |
| E. Neal Roberts Elementary | 679 |
| Hillside Elementary | 719 |
| Hunt Elementary | 674 |
| Kendall Elementary | 431 |
| Lankershim Elementary | 727 |
| Lincoln Elementary | 836 |
| Lytle Creek Elementary | 726 |
| Marshall Elementary | 528 |
| Monterey Elementary | 747 |
| Muscoy Elementary | 735 |
| Newmark Elementary | 578 |
| North Park Elementary | 693 |
| Palm Avenue Elementary | 753 |
| Ramona-Alessandro Elementary | 671 |
| Riley Elementary | 752 |
| Rio Vista Elementary | 555 |
| Roosevelt Elementary | 702 |
| Vermont Elementary | 752 |
| Wilson Elementary | 618 |
| Totals | 14,351 |

MTYRE Percentage Calculation

| Item | Figure |
|--|--------------|
| Enrollment at MTYRE Schools | 14,351 |
| Total K-6 Enrollment | 28,173 |
| Percentage of Students in Grades K-6 on MTYRE | 50.9% |

Exhibit G

Bonding Capacity Calculation

SAN BERNARDINO COUNTY SUPERINTENDENT OF SCHOOLS

BUSINESS ADVISORY SERVICES

2010-11

ESTIMATED BOND ISSUANCE CAPACITY CALCULATION

San Bernardino City Unified

School District

10/28/2010

Pursuant to Education Code Sections 15100-15111

| | |
|--|----------------|
| A. District's 1987/88 Unitary Assessed Valuation (from Co Auditor) | 289,157,440 |
| B. Countywide 1987/88 Unitary Assessed Valuation (from Co Auditor) | 3,218,349,650 |
| C. Ratio of District's 1987/88 Unitary Assessed Valuation to Countywide 1987/88 (A/B) | 0.089846496 |
| D. Countywide Current Year Unitary Assessed Valuation (from Co Auditor) | 5,175,403,682 |
| E. District's Current Year Unitary Assessed Valuation (D times C) | 464,991,888 |
| F. Current Year Assessed Valuation for Secured & Unsecured Property including Redevelopment Increment and Secured Utility | 10,969,794,701 |
| G. Total Assessed Valuation for calculating Bond Issuance Capacity (E+F) | 11,434,786,589 |

Bonding Capacity (E.C.15102, 15106):

| | |
|-----------------------|-------|
| Elementary Districts | 1.25% |
| High School Districts | 1.25% |
| Unified Districts | 2.50% |

Gross Bond Issuance Capacity for Current Year **285,869,665**

* Less outstanding principal of previously issued Debt, as of June 30, 2010

| | |
|--------------------------|---|
| General Obligation Bonds | - |
| CFDs | - |

Net Issuance Capacity for Current Year **285,869,665**

Based upon information available from the San Bernardino County Auditor Controller, including the last equalized assessment roll.

* To be completed by District.

Exhibit H

Correspondence with the Cities and County



December 6, 2010

Mr. Mark Tomich
Director of Development Services
City of Colton
659 North La Cadena Drive
Colton, CA 92324

Regarding: Residential Development Projections within San Bernardino City Unified School District Boundaries

Dear Mr. Tomich,

Dolinka Group, LLC is in the process of updating the School Facilities Needs Analysis ("SFNA") for the San Bernardino City Unified School District ("School District"). Pursuant to Section 65995.5(c)(3) of the Government Code, one component of the Analysis is an estimate of the number, type, and square footage of expected future residential units ("Future Units") to be constructed in the area of the City of Colton ("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. The projection of the number and type of Future Units, as well as the average square footage calculation, were determined based on information collected from the City last year. Dolinka Group would like to provide the City with the opportunity to review, and if necessary, modify these projections. Please complete the attached page ("Certificate") and fax the Certificate to Dolinka Group.

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

Sincerely,

A handwritten signature in black ink, appearing to read 'Hayley Hamada', written in a cursive style.

Hayley Hamada
Senior Analyst

S:\Clients\San Bernardino City Unified SD\Demographics\SFNA\SY1011\Correspondence\City of Colton.doc



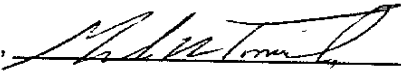
In its efforts to assist Dolinka Group, LLC in preparing a School Facilities Needs Analysis in accordance with the guidelines of Section 65995.5(c)(3) of the Government Code for the San Bernardino City Unified School District, the City of Colton ("City"):

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

| Unit Type | Projected Number of Units | 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 |

The residential development projected by the City is listed below:

| Unit Type | Projected Number of Units | 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) | | |

Signed, , of the City of Colton on December 6, 2010.

Printed Name: Mark R. Tomich

Title: Development Services Director



December 6, 2010

Mr. Larry Mainez
Planning Department
City of Highland
27215 Base Line
Highland, CA 92346

Regarding: Residential Development Projections within San Bernardino City Unified School District Boundaries

Dear Mr. Mainez,

Dolinka Group, LLC is in the process of updating the School Facilities Needs Analysis ("SFNA") for the San Bernardino City Unified School District ("School District"). Pursuant to Section 65995.5(c)(3) of the Government Code, one component of the Analysis is an estimate of the number, type, and square footage of expected future residential units ("Future Units") to be constructed in the area of the City of Highland ("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. The projection of the number and type of Future Units, as well as the average square footage calculation, were determined based on information collected from the City last year. Dolinka Group would like to provide the City with the opportunity to review, and if necessary, modify these projections. Please complete the attached page ("Certificate") and fax the Certificate to Dolinka Group.

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

Sincerely,

A handwritten signature in cursive script that reads 'Hayley Hamada'.

Hayley Hamada
Senior Analyst

S:\Clients\San Bernardino City Unified SD\Demographics\SFNA\SY1011\Correspondence\City of Highland.doc



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

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

| Unit Type | Projected Number of Units | Estimated Average Square Footage per Unit |
|--|---------------------------|---|
| Single Family Detached (i.e. single family home) | 40 | 1,800 |
| Single Family Attached (e.g. condos, duplexes, townhomes, etc.) | 0 | N/A |
| Multifamily (i.e. apartments) | 215 | 800 |

 The residential development projected by the City is listed below:

| Unit Type | Projected Number of Units | Estimated Average Square Footage per Unit |
|--|---------------------------|---|
| Single Family Detached (i.e. single family home) | 76 | 1,800 |
| Single Family Attached (e.g. condos, duplexes, townhomes, etc.) | 0 | 0 |
| Multifamily (i.e. apartments) | 121 | 800 |

Signed, Lawrence Mainez, of the City of Highland on December 9, 2010.
Printed Name: Lawrence Mainez
Title: City Planner



December 2, 2010

Ms. Terri Rahhal
City Planner
City of San Bernardino
300 North "D" Street, 3rd Floor
San Bernardino, CA 92418

Regarding: Residential Development Projections within San Bernardino City Unified School District Boundaries

Dear Ms. Terri Rahhal,

Dolinka Group, LLC is in the process of updating the School Facilities Needs Analysis ("SFNA") for the San Bernardino City Unified School District ("School District"). Pursuant to Section 65995.5(c)(3) of the Government Code, one component of the Analysis is an estimate of the number, type, and square footage of expected future residential units ("Future Units") to be constructed in the area of the City of San Bernardino ("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. The projection of the number and type of Future Units, as well as the average square footage calculation, were determined based on information collected from the City last year. Dolinka Group would like to provide the City with the opportunity to review, and if necessary, modify these projections. Please complete the attached page ("Certificate") and fax the Certificate to Dolinka Group.

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

Sincerely,

A handwritten signature in black ink that reads 'Hayley Hamada'.

Hayley Hamada
Senior Analyst

S:\Clients\San Bernardino City Unified SD\Demographics\SFNA\SY1011\Correspondence\City of SB.doc



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

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

| Unit Type | Projected Number of Units | Estimated Average Square Footage per Unit |
|---|---------------------------|---|
| Single Family Detached <i>(i.e. single family home)</i> | 600 | 2,000 |
| Single Family Attached <i>(e.g. condos, duplexes, townhomes, etc.)</i> | 200 | 1,500 |
| Multifamily <i>(i.e. apartments)</i> | 100 | 800 |

~~X~~ The residential development projected by the City is listed below:

5-yr. Projection
2011-2015

| Unit Type | Projected Number of Units | Estimated Average Square Footage per Unit |
|---|---------------------------|---|
| Single Family Detached <i>(i.e. single family home)</i> | 200 | 1,800 |
| Single Family Attached <i>(e.g. condos, duplexes, townhomes, etc.)</i> | 100 | 1,200 |
| Multifamily <i>(i.e. apartments)</i> | 100 | 800 |

Signed, T. Rahhal, of the City of San Bernardino on December 30, 2010.

Printed Name: Terri Rahhal

Title: City Planner



December 14, 2010

Mr. Bennett
Land Use Services Department
County of San Bernardino
385 N. Arrowhead Ave.
1st Floor
San Bernardino, CA 92415

Regarding: Residential Development Projections within San Bernardino City Unified School District Boundaries

Dear Mr. Bennett,

Dolinka Group, LLC is in the process of updating the School Facilities Needs Analysis ("SFNA") for the San Bernardino City Unified School District ("School District"). Pursuant to Section 65995.5(c)(3) of the Government Code, one component of the Analysis is an estimate of the number, type, and square footage of expected future residential units ("Future Units") to be constructed in the area of the County of San Bernardino ("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. The projection of the number and type of Future Units, as well as the average square footage calculation, were determined based on information collected from the County last year. Dolinka Group would like to provide the County with the opportunity to review, and if necessary, modify these projections. Please complete the attached page ("Certificate") and fax the Certificate to Dolinka Group.

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

Sincerely,

A handwritten signature in black ink that reads 'Hayley Hamada'.

Hayley Hamada
Senior Analyst

S:\Clients\San Bernardino City Unified SD\Demographics\SFNA\SY1011\Correspondence\County of SB.doc




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

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

| Unit Type | Projected Number of Units | Estimated Average Square Footage per Unit |
|---|---------------------------|---|
| Single Family Detached <i>(i.e. single family home)</i> | 150 | 2,000 |
| Single Family Attached <i>(e.g. condos, duplexes, townhomes, etc.)</i> | 0 | N/A |
| Multifamily <i>(i.e. apartments)</i> | 0 | N/A |

The residential development projected by the County is listed below:

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

Signed, , of the County of San Bernardino on December 14, 2010.

Printed Name: GREGORY BENNETT

Title: PLANNER

Exhibit I

Facilities Cost Impacts of 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). This section examines the facilities cost impacts of two specific types of Reconstruction: (i) Residential Reconstruction and (ii) Reconstruction of Commercial/Industrial Construction into Residential Construction.

A. Residential Reconstruction

Residential Reconstruction consists of voluntarily demolishing existing residential units and replacing them with new residential development. Dolinka Group is aware that a measurable amount of Residential Reconstruction has occurred within the School District over the previous five (5) years, and that a similar amount may occur over the next five (5) years. In order to examine the potential facilities cost impacts that Residential Reconstruction could have upon the School District, Dolinka Group evaluated historical information submitted to the California Department of Finance ("DOF") regarding demolished units. Dolinka Group evaluated demolished unit data for the Cities of Colton, Highland, and San Bernardino, as well as the unincorporated County of San Bernardino. Based on a proportional analysis of the annual average number of demolished and constructed units within the Cities and County, Dolinka Group estimates that the School District may see 193 SFD units, zero (0) SFA units, and zero (0) MF units demolished over the next five (5) years and replaced with future units. Table I-1 details the projected number of demolished units for the School District over the next five (5) years by jurisdiction.

**Table I-1
Projected Demolished Units over the Next Five Years**

| Jurisdiction | SFD Units | SFA Units | MF Units | Total Units |
|--------------------------|------------------|------------------|-----------------|--------------------|
| City of Colton | 0 | 0 | 0 | 0 |
| City of Highland | 4 | 0 | 0 | 4 |
| City of San Bernardino | 120 | 0 | 0 | 120 |
| County of San Bernardino | 69 | 0 | 0 | 69 |
| Future Units | 193 | 0 | 0 | 193 |

The Future Units listed in Table 3 of Section III.A include units that could be constructed to take the place of demolished units. To determine the net student enrollment from future units, the student generation rates calculated for the School District and described in Section III.A were then applied to the projected demolished units as shown in Table I-1 to determine the potential number of students who could be displaced as a result of demolished residential units. Projected unhoused student enrollment from Future Units (Table 9) was then calculated less students displaced from Residential Reconstruction ("Net Projected Student Enrollment"). The Net Projected Student Enrollment is shown in Table I-2.

**Table I-2
Projected Student Enrollment**

| School Level | Students Projected from Future Units | Students Projected from Residential Reconstruction | Net Projected Student Enrollment |
|---------------------|---|---|---|
| Elementary School | 137 | 59 | 78 |
| Middle School | 103 | 35 | 68 |
| High School | 143 | 39 | 104 |
| Total | 383 | 133 | 250 |

Utilizing per student costs (Exhibit E), Dolinka Group calculated the total school facilities costs for Net Projected Student Enrollment by school level in order to provide a credit due to the reduced cost impacts of displaced students. The total school facilities costs for Net Projected Student Enrollment are shown in Table I-3.

**Table I-3
Net Projected Student Enrollment Total Facilities Cost Impacts**

| School Level | Net Projected Student Enrollment | Cost Per Student | Total Facilities Cost Impacts |
|---------------------|---|-------------------------|--------------------------------------|
| Elementary School | 78 | \$68,276 | \$5,325,528 |
| Middle School | 68 | \$53,748 | \$3,654,864 |
| High School | 104 | \$86,949 | \$9,042,696 |
| Total | 250 | N/A | \$18,023,088 |

These cost impacts are less than the total cost impacts as a result of crediting the potential loss of enrollment due to the demolition of existing units. In order to determine the total facilities cost impacts per square foot, Dolinka Group divided the total facilities cost impacts generated from the Net Projected Student Enrollment by the total square footage of assessable space of Future Units, including that which may be a result of Residential Reconstruction (Table 17). Table I-4 shows the total facilities cost impacts per square foot for Net Projected Student Enrollment.

**Table I-4
Total Facilities Cost Impacts per Square Foot**

| Item | Total Facilities Cost Impacts | Total Square Footage | Total Cost Impact per Square Foot |
|-----------------|--------------------------------------|-----------------------------|--|
| School District | \$18,023,088 | 1,093,420 | \$16.48 |

As shown, the total cost impact per square foot in Table I-4 is \$16.48, which is greater than the Alternative No. 2 Fee of \$5.19 per square foot calculated in the Analysis. It should be noted that the actual cost impact produced by students generated from all Future Units, without consideration of those who have been displaced by Residential Reconstruction is \$36.47 per square foot (see Exhibit E). In summary, Residential Reconstruction was considered by reducing the projected number of unhoused student from Future Units by the estimated number of students occupying units projected to be demolished over the next five (5) years. As a result, the number of projected unhoused students was reduced. The cost impact generated from this reduced number of unhoused students was then divided by the total assessable square footage, including that attributable to Residential Reconstruction. Despite reducing impacts by considering existing students living in units to be demolished, the total cost per square foot, as shown in Table I-4, exceeds the Alternative Fees justified in the Analysis. The School District is, therefore, fully justified in levying the Alternative Fees calculated in the Analysis on all Future Units, including those from Residential Reconstruction which may occur over the next five (5) years.

B. Reconstruction of Commercial/Industrial Construction into Residential Construction

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

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

Exhibit J

School Facilities Capacity Calculation

**San Bernardino City Unified School District
School Facilities Capacity Calculation**

| Application | Item | Elementary School | Middle School | High School |
|-----------------------|-------------------------------------|--------------------------|----------------------|--------------------|
| N/A | SAB Form 50-02 | 21,800 | 6,696 | 10,692 |
| N/A | Non-Severe/Severe Capacity | 863 | 431 | 575 |
| 50/67876-00-076 | Graciano Gomez Elementary | 600 | 0 | 0 |
| 50/67876-00-009 | Anton Elementary #45 | 945 | 0 | 0 |
| 50/67876-00-071 | Arroyo Valley High | 0 | 0 | 362 |
| 50/67876-00-026 | Barton Elementary | 50 | 0 | 0 |
| 50/67876-00-040 | Barton Elementary | 0 | 17 | 0 |
| 50/67876-00-018 | Belvedere Elementary | 50 | 0 | 0 |
| 50/67876-00-072 | Bing Wong Elementary | 676 | 0 | 0 |
| 50/67876-00-073 | H. Frank Dominguez Elementary | 348 | 0 | 0 |
| 50/67876-00-034 | Cajon High | 0 | 0 | 27 |
| 50/67876-00-039 | Cajon High | 0 | 15 | 0 |
| 50/67876-00-002 | Cesar E. Chavez Middle | 375 | 984 | 0 |
| 50/67876-00-004 | Colonel Joseph C. Rodriquez | 725 | 0 | 0 |
| 50/67876-00-065 | Curtis Middle | 0 | 351 | 810 |
| 50/67876-00-025 | Davidson Elementary | 50 | 0 | 0 |
| 50/67876-00-019 | Del Rosa Elementary | 50 | 0 | 0 |
| 50/67876-00-033 | Del Vallejo Middle | 0 | 135 | 0 |
| 50/67876-00-027 | Highland Pacific Elementary | 50 | 0 | 0 |
| 50/67876-00-022 | Inghram | 50 | 0 | 0 |
| 50/67876-00-005 | Juanita Blakely Jones Elementary | 945 | 0 | 0 |
| 50/67876-00-030 | Kendall Elementary | 50 | 0 | 0 |
| 50/67876-00-017 | Lankershim Elementary | 50 | 0 | 0 |
| 50/67876-00-078 | Captain Leland F. Norton Elementary | 850 | 0 | 0 |
| 50/67876-00-079 | Little Mountain Elementary | 600 | 0 | 0 |
| 50/67876-00-074 | Pakuma K-8 | 425 | 0 | 0 |
| 50/67876-00-023 | Lytle Creek Elementary | 50 | 0 | 0 |
| 50/67876-00-080 | Middle College | 0 | 0 | 405 |
| 50/67876-00-021 | Muscoy Elementary | 50 | 0 | 0 |
| 50/67876-00-003 | Indian Springs High | 0 | 0 | 1,782 |
| 50/67876-00-029 | Newmark Elementary | 50 | 0 | 0 |
| 50/67876-00-028 | Parkside Elementary | 50 | 0 | 0 |
| 50/67876-00-016 | Rio Vista Elementary | 50 | 0 | 0 |
| 50/67876-00-075 | Dr. Mildred D. Henry Elementary | 525 | 0 | 0 |
| 50/67876-00-024 | Urbita Elementary | 50 | 0 | 0 |
| 50/67876-00-041 | Urbita Elementary | 0 | 21 | 0 |
| 50/67876-00-020 | Vermont Elementary | 50 | 0 | 0 |
| 50/67876-00-077 | George Brown Jr. Elementary | 750 | 0 | 0 |
| Total Capacity | N/A | 31,177 | 8,650 | 14,653 |

Exhibit K

Allocation of Surplus Seats

Exhibit L

Surplus Site Determination

Section 65995.6(b)(1) requires the School District to identify and consider any surplus property that it owns that can 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.

- The School District currently owns one (1) vacant parcel of approximately 2.8 acres. Based on a recent site acquisition cost estimate of \$902,574 per acre, the School District has determined the value of the vacant parcel to be \$2,527,207. This value will be considered in the following exhibit (Exhibit M) to potentially offset the impact of Future Units.

Exhibit M

**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. Certificates of Participation

Certificates of Participation ("COPs") are a means of financing facilities through a lease, as opposed to a new revenue source. All lease payments associated with a COPs issuance must be paid by the issuing school district through its existing sources of revenue. The lease payments are typically secured by the School District's general fund.

Over the last several years the School District, as an interim source of capital facilities funding, has issued COPs. The proceeds of the COPs and lease agreements have been expended on the acquisition of property and construction of various facilities, all of which are reflected in the facilities capacity calculation. In 2003, the School District issued \$57,000,000 in Bridge Financing COPs to provide funding needed to expedite several State eligible projects and to pay off COPs issued in 2001. The School District has utilized all of the proceeds from the Bridge Financing COPs to pay for completed facilities projects, therefore, no funding exists from this source to offset the impacts of the Projected Unhoused Students generated from Future Units.

2. General Obligation Bonds

GO bonds are tax-exempt bonds secured by the "full faith and credit" (i.e., unlimited taxing power) of the issuing school district. A bond generally requires 2/3 approval of voters; however, a Proposition 39 GO bond is approved by 55 percent of the votes. In return for a lower voter approval threshold, the School District (i) has limitations on the type of expenditures, (ii) must provide additional data to the electorate, and (iii) upon approval, the expenditures are monitored by a Citizens Oversight Committee. Voter approval grants the School District the right to levy an additional ad valorem tax on all taxable property within its jurisdiction in order to pay debt service on the GO bonds.

On March 2, 2004 the voters of the School District approved Measure T, which authorized the issuance of \$140,000,000 in GO bonds. The proceeds from these GO bonds will be used (i) to enhance current facilities for the School District's existing students, (ii) to modernize existing school facilities, and (iii) to construct new schools to house the students generated from existing residential units. Based on the most current information provided by the School District, the remaining available GO bond proceeds are \$21,665,590. However, all of the remaining proceeds have been dedicated to (i) the modernization of existing facilities and (ii) new construction and expansion projects that are currently under construction and have already been included in the School District's capacity calculation. Therefore, the School District has no proceeds from GO Bonds available to reduce the facilities impacts of students generated from Future Units.

3. Redevelopment Pass-Throughs

California redevelopment law allows school districts to share in tax increment income via pass-through agreements with local redevelopment agencies. However, school districts cannot unilaterally establish redevelopment project areas and the revenues school districts may obtain from redevelopment pass-throughs are generally limited.

The School District currently has pass-through agreements with redevelopment agencies of

the Cities of San Bernardino and Highland ("Agencies"). Pursuant to these pass-through agreements, revenues from the Agencies are committed to fund school facilities necessary to benefit students generated from residential units located in the redevelopment project areas. Based on historical information it is estimated that the School District will collect approximately \$6,310,883 over the next five (5) years.

4. Community Facilities School 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 not formed any CFDs to date.

5. Commercial/Industrial School Fees

Sections 17620 *et seq.* of the Education Code gives School Districts the authority to collect statutory school fees from commercial and industrial development if a justification study is prepared and certain nexus findings are made.

The School District currently collects such fees in the amount of \$0.47 per square foot. Based on a weighted average of historical collections it is estimated that the School District will collect approximately \$4,730,889 in School Fees from commercial/industrial development over the next five (5) years.

6. Identification of Existing Surplus Local Funds

As explained in Section III.B, the School District currently has zero (0) unhoused students from existing residential units. Therefore, the School District will not incur a cost impact for providing additional facilities to existing unhoused students. Over the next five (5) years, the School District will need to construct school facilities to house students to be generated from Future Units. Using per-student costs calculated in Exhibit E, providing adequate school facilities to the 383 Projected Unhoused Students identified in Section III.A.3 will have a cost impact to the School District of \$27,323,563. Table M-1 shows a summary of the school facilities needs of the School District.

**Table M-1
Identification of School Facilities Needs (2011\$)**

| Item | Amount |
|-----------------------------------|---------------------|
| Existing Unhoused Student Impact | \$0 |
| Projected Unhoused Student Impact | \$27,323,563 |
| Total | \$27,323,563 |

As stated above, the School District has identified (i) projected Redevelopment Revenue in the amount of \$6,310,883, (ii) potential commercial/industrial School Fees in the amount of \$4,730,889, and (iii) one (1) surplus site valued at \$2,527,207. 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 383 Projected Unhoused Students would generate \$8,078,456 in State funding. Additionally, based on Table 18 of the Analysis, the School District can expect to receive \$8,078,456 from Alternative No. 2 Fees on new residential development. Table M-2 summarizes potential funding sources to fund the school facilities needs identified in Table M-1.

**Table M-2
Identification of Local Funds**

| Item | Amount |
|---|---------------------|
| Projected Redevelopment Revenue | \$6,310,883 |
| Projected Commercial/Industrial School Fees | \$4,730,889 |
| Surplus Sites | \$2,527,207 |
| State Funding for Projected Unhoused Students | \$8,078,456 |
| Projected Alternative No. 2 Fees | \$8,078,456 |
| Total | \$29,725,891 |

As shown below in Table M-3, when considering the current and future school needs of the School District, there is currently a \$2,402,328 funding credit. Therefore, the School District does have surplus funds available to offset the cost impact of Future Units. The Alternative No. 2 Fee School Facility Costs in Table 16 have been reduced accordingly.

**Table M-3
Identification of Funding Shortfall**

| Item | Amount |
|---|----------------------|
| School Facilities Needs | \$27,323,563 |
| Local Funding Sources | (\$29,725,891) |
| Remaining Funding Shortfall/(Credit) | (\$2,402,328) |

Exhibit N

Calculation of Additional Grants for General Site Development

**San Bernardino City Unified School District
General Site Development Grant Per Student Calculation**

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

| School Level | Base Per-Pupil Grant ^[1] | Percent | Additional Grant |
|-------------------|-------------------------------------|---------|------------------|
| Elementary School | \$8,895 | 6.00% | \$534 |
| Middle School | \$9,430 | 6.00% | \$566 |
| High School | \$11,961 | 3.75% | \$449 |

[1] Includes Automatic Fire Detection/Sprinkler Grant.

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

| School Level | Grant Per New Usable Acre | Site Size | Grant Per School Facility |
|-------------------|---------------------------|-----------|---------------------------|
| Elementary School | \$14,200 | 10.6 | \$150,520 |
| Middle School | \$14,200 | 26.6 | \$377,720 |
| High School | \$14,200 | 46.5 | \$660,300 |

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

| School Level | Grant Per School Facility | Facility Capacity | Grant Per Student |
|-------------------|---------------------------|-------------------|-------------------|
| Elementary School | \$150,520 | 900 | \$167 |
| Middle School | \$377,720 | 1,600 | \$236 |
| High School | \$660,300 | 2,400 | \$275 |

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

| School Level | Additional Grant as a Percentage of Base Per-Pupil Grant | Grant Per Student | Total Grant for General Site Development |
|-------------------|--|-------------------|--|
| Elementary School | \$534 | \$167 | \$701 |
| Middle School | \$566 | \$236 | \$802 |
| High School | \$449 | \$275 | \$724 |