



Perris Union High School District 2024 Fee Justification Study

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EXECUTIVE SUMMARY

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

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

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

The School District provides education for grades 7-12 for students generated by the Perris Elementary School District (“PESD”) and grades 9-12 for students generated by the Menifee Union School District (“MUSD”), the Nuvew Union School District (“NUSD”) and the Romoland School District (“RSD”). Pursuant to Education Code section 17623(a), the School District, as a non-unified school district sharing common jurisdiction with other non-unified school district(s), entered into a fee sharing agreement with PESD, MUSD, NUSD and RSD. The agreement specifies the percentage of the maximum School Fees that may be levied and collected by each school district. According to the agreement, twenty eight percent (28%) of the maximum School Fees may be charged and collected by the School District for areas within the School District boundaries shared by MUSD, NUSD and RSD, or \$1.45 and \$0.2352 for residential and commercial/industrial development, respectively (“Applicable School Fees”) and forty percent (40%) of the maximum School Fees may be charged and collected by the School District for areas within the School District boundaries shared by PESD, or \$2.07 and \$0.3360 for residential and commercial/industrial development, respectively (“PESD Area Applicable School Fees”). Based on the findings presented in this Study, the School District is justified in collecting its portion of the maximum residential and commercial/industrial School Fees¹. The findings are summarized as follows.

Residential Development

New residential development in the School District is projected over the next ten (10) years and

¹ Except for the new commercial/industrial development categorized as Rental Self-storage facilities, as further described in this Study.

beyond. Based on student generation rates determined for the School District, new unmitigated² residential development could generate an estimated 3,893 new students over the next ten (10) years. An analysis of the School District’s existing permanent facilities capacity and enrollment demonstrates the projected student enrollment supports the need for the acquisition of new school sites or the construction of additional school campuses. The analysis additionally supports the expansion and/or reconstruction of existing school facilities. The school facilities cost impact per residential square foot as determined in this Study are shown in Table E-1.

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

Impact Per Square Foot		Applicable Residential School Fee Per Square Foot	
PESD	MUSD, NUSD & RSD	PESD	MUSD, NUSD & RSD
\$3.08	\$2.20	\$2.07	\$1.45

The cost impacts per square foot of residential construction/reconstruction shown in Table E-1 are greater than the School District’s share of the current maximum authorized residential School Fee, which is \$1.45 per square foot for the MUSD, NUSD & RSD Area, and \$2.07 per square foot for the PESD Area; therefore, the School District is reasonably justified in levying statutory Level I school fees in an amount up to but not exceeding \$1.45 per square foot for the MUSD, NUSD & RSD Area, and \$2.07 per square foot for the PESD Area (the “Applicable Residential School Fee”).

Commercial/Industrial Development

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

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

The maximum authorized School Fee’s per square foot of assessable space applicable to new

² The term “unmitigated” is further described in Section II.B of this Study.

commercial/industrial development for the MUSD, NUSD & RSD Area and the PESD Area are \$0.2352 per square foot and \$0.3360 per square foot, respectively. The cost impacts per square foot for each category of commercial/industrial construction are equal to or exceed (i) \$0.2352 per square foot or (ii) \$0.3360 per square foot, except for Rental Self-Storage development, which may be charged at \$0.0190 per square foot for the MUSD, NUSD & RSD Area and \$0.0250 per square foot for the PESD Area (“Applicable Com/Ind School Fees”). Therefore, the School District is fully justified in levying commercial/industrial School Fees on new commercial/industrial development in an amount up to but not exceeding the Applicable Com/Ind School Fees. The Applicable Com/Ind School Fees that may be charged by the School District are summarized in Table E-2.

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

Commercial/Industrial Category	Impact Per Square Foot		Maximum Applicable School Fees	
	PESD	MUSD, NUSD & RSD	PESD	MUSD, NUSD & RSD
Banks	\$1.14	\$0.85	\$0.3360	\$0.2352
Community Shopping Center	\$0.62	\$0.46	\$0.3360	\$0.2352
Neighborhood Shopping Center	\$1.13	\$0.85	\$0.3360	\$0.2352
Industrial Business Parks	\$1.43	\$1.06	\$0.3360	\$0.2352
Industrial Parks/ Warehousing/Manufacturing	\$0.55	\$0.41	\$0.3360	\$0.2352
Rental Self-Storage	\$0.03	\$0.02	\$0.0250	\$0.0190
Research & Development	\$1.23	\$0.92	\$0.3360	\$0.2352
Hospitality (Lodging)	\$0.46	\$0.34	\$0.3360	\$0.2352
Commercial Offices (Standard)	\$1.94	\$1.45	\$0.3360	\$0.2352
Commercial Offices (Large High Rise)	\$1.84	\$1.38	\$0.3360	\$0.2352
Corporate Offices	\$1.09	\$0.81	\$0.3360	\$0.2352
Medical Offices	\$1.73	\$1.29	\$0.3360	\$0.2352

SECTION I. LEGISLATION AND LEGAL REQUIREMENTS

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

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

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

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

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

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

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

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

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

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

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

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

A. SCHOOL DISTRICT CAPACITY AND STUDENT ENROLLMENT

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

The School District currently operates one (1) middle school serving grades 7 and 8, four (4) comprehensive high schools, one (1) continuation high school serving grades 10 through 12, one (1) community adult school generally serving grades 9 through 12, one (1) military institute charter facility serving grades 5 through 12 and one (1) online charter school serving grades 7 through 12. Per Education Code Section 17071.10 et seq., these facilities have a capacity to accommodate 14,985 students. Pursuant to Education Code Section 17071.30, portable classrooms were not included in the calculation to the extent they are (i) leased through the State Relocatable Classroom Program, (ii) leased for a period of less than five (5) years, (iii) leased when needed as interim housing (project basis), or (iv) represent the number of portables that exceed 25% of the School District's permanent classrooms. Appendix "B" provides a calculation of the updated facility capacity. It should be noted these capacities are driven by State loading standards and do not necessarily reflect the School District's program goals or the condition of such facilities.

Based on Student Enrollment Data as of October 2023, the student enrollment of the School District is 11,849 students. A summary of the student enrollment data is included in Appendix "C". Current available capacity is calculated by subtracting current student enrollment from existing school facilities capacity for each school level. The available capacity calculation is shown in Table 1.

TABLE 1
Facilities Capacity and Student Enrollment

School Level	Existing Facilities Capacity	Student Enrollment (October 2023)	Available/ (Deficit) Capacity
Middle School	1,377	949	428
High School	13,608	10,667	2,941
Total	14,985	11,616	3,369

B. PROJECTED UNHOUSED STUDENTS

1. Projected Residential Units

To estimate projected residential unit growth over the next ten (10) years, Koppel & Gruber Public Finance (“K&G Public Finance obtained information from the Planning Departments of the cities of Perris, Menifee, Lake Elsinore, Murrieta, San Jacinto and Wildomar (“Cities”) and the County of Riverside (“County”) Planning Department (collectively the “Planning Agencies”). Annualizing the data over the 10-year period, K&G Public Finance projects an addition of 25,411 residential units (“Projected Units”).

The School District has entered into mitigation agreements with certain property owners and/or developers, whereby the terms of the mitigation agreements require mitigation payments in lieu of paying School Fees. Many of the Projected Units are located within areas subject to mitigation agreements. Those Projected Units subject to such agreements have been identified and/or estimated and excluded from the calculation. This Study conservatively assumes for purpose of analysis that the agreements fully offset the impact of the developments governed by those agreements, regardless of whether the agreements in fact provide full mitigation.

The types of residential units³ considered include:

- (i) **Single family detached (“SFD”)** –dwelling units with no common walls and assigned an individual and separate assessor’s parcel;
- (ii) **Single family attached/Multi-family units (“SFA/MF”)** – dwelling units sharing a common wall (e.g. apartments, duplexes, townhouses, condominiums, etc.);

It should be noted that Mobile homes are not included in this analysis.⁴

³ Accessory Dwelling Units (ADUs) or Junior ADUs are independent residential dwelling units located on the same parcel as a primary residential dwelling. ADUs may be detached, attached, or located within the primary dwelling, including within garages and storage areas. ADUs are generally considered new construction because they are living areas that did not previously exist on the parcel or as a part of the primary home. Whether ADUs are called casitas, granny flats, in-law units, generational units, or converted living space, these areas are intended to provide a new area for living and sleeping – essentially a new residential unit which did not previously exist. The School District recognizes that students are projected to be generated from ADUs and will charge the appropriate fee rate for these types of new construction projects.

⁴ Education Code Section 17625 sets forth the prerequisites that must be met before school districts may levy school fees on mobile homes. Since it is often difficult to determine and make projections relating to mobile homes that meet those requirements, the mobile home category is omitted from this Study.

The estimated total Projected Units that are subject to mitigation agreements and/or CFDs (which, for purposes of this Study are deemed “mitigated”) and the remaining unmitigated Projected Units in the entire School District are summarized by residential category in Table 2.

TABLE 2
Projected Units by Residential Category

District Area	Residential Category	Mitigated Projected Units	Unmitigated Projected Units	Total Projected Units
MUSD, NUSD & RSD	SFD	4,733	10,730	15,463
	SFA/MF	1,234	3,800	5,034
PESD	SFD	0	2,553	2,553
	SFA/MF	0	2,361	2,361
Total		5,967	19,444	25,411

2. Student Generation Rates

In order to calculate student generation rates (“SGRs”), K&G Public Finance first obtained property characteristic data from the Assessor’s Office of the County of Riverside (“County”). The database contains all residential parcels within the School District and provides the year that a structure (if any) was built and land use class information (i.e. condominiums, single family dwellings, etc.). Additional research, including collection of building permit data, was used to update the database. Parcels in the database were classified by residential category (SFD or SFA/MF units). Since the property data information was missing unit counts for many of the residential parcels contained therein, K&G Public Finance relied on housing information from the U.S. Census Bureau to estimate the total number of residential units located within the School District by residential category.

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

TABLE 3
Student Generation Rates

School Level	SFD Units	SFA/MF Units
Middle School	0.0980	0.0582
High School	0.1614	0.0807
Total	0.2594	0.1389

3. Projected Student Enrollment

Projected student enrollment was determined by multiplying the SGRs in Table 3 by the number of unmitigated Projected Units as shown in Table 2. A total of 2,039 new students are estimated to be generated from unmitigated Projected Units for the MUSD, NUSD & RSD Area and 990 new students are estimated to be generated from unmitigated Projected Units for the PESD Area. The projected student enrollment is summarized by school level and area of the School District in Table 4.

TABLE 4
Projected Student Enrollment

School Level/District Area	Projected Student Enrollment ¹
Middle School (PESD)	387
High School (PESD)	603
<i>Subtotal PESD</i>	990
High School (MUSD, NUSD & RSD)	2,039
<i>Subtotal MUSD, NUSD & RSD</i>	2,039
Total Projected Student Enrollment	3,029

¹Includes projected student enrollment generated by unmitigated Projected Units only.

4. Projected Unhoused Students

As shown in Table 1, there is an available seat capacity at both the middle school and high school level. While these findings indicate the School District’s collective capacity is available at all school levels to accommodate projected students from new development over the course of the planning period, the analysis does not consider (i) the seats that must first be reserved for students from mitigated housing (ii) the condition and adequacy of existing capacity, (iii) the availability of capacity within areas of the School District where a greater and disproportionate amount of new development is expected; and/or (iv) the service and educational goals of the School District.

As further described in this Study, capacity improvements are necessary for the long-term use to adequately house the existing student population and future enrollment from new housing at all school levels. The School District’s facility needs are discussed in more detail in Section II.C.1. The facility needs exist regardless of the availability of capacity to house student enrollment, inclusive of student enrollment generated from

new development. Therefore, for the purpose of this analysis, Projected Student Enrollment is not adjusted by available capacity and is equal to Projected Student Enrollment (“Projected Unhoused Students”). Table 5 shows the determination of Projected Unhoused Students by school level.

**TABLE 5
Projected Unhoused Students**

School Level	Projected Student Enrollment	Available Seat Adjustment	Projected Unhoused Students
Middle School (PESD)	387	0	387
High School (PESD)	603	0	603
High School (MUSD, NUSD & RSD)	2,039	0	2,039
Total	3,029	0	3,029

C. FACILITY NEEDS AND ESTIMATED PER SEAT/STUDENT COST

1. Facilities Needs

In 2023 the School District finalized a Long-Range Facilities Master Plan (the “2023 FMP”), which among other items, identifies both the short-range and long-range facility needs of the School District, including the need for additional schools to be constructed at both the middle school and high school levels. The total project costs were estimated at \$468,787,000 in 2023 dollars, without accounting for projected construction cost escalation over the project timeline. Revenues from the imposition of the applicable school fees are intended to fund, in part, estimated costs for the construction of new classroom facilities and capital improvement projects required to accommodate Projected Student Enrollment.

**TABLE 6
Estimated Facilities Costs Per School Level**

School Level	Total Estimated Facilities Costs
Middle School	\$16,190,000
High School	\$452,597,000

2. Estimated Cost Per Seat/Student

The estimated cost per student to provide adequate school facilities to house Projected Unhoused Students for each school level was determined based on the costs to construct new facilities.

**TABLE 7
Total Facilities Cost Impact Per Seat/Student**

School Level	Total Estimated Facilities Costs	School District Facilities Capacity	Facilities Cost Impact per Seat/Student
Middle School	\$16,190,000	1,377	\$11,757
High School	\$452,597,000	13,608	\$33,260

SECTION III. PROJECTED IMPACT OF RESIDENTIAL DEVELOPMENT

The following sections present the school facility impact analysis for new residential development and provide step-by-step calculations of the estimated per residential square foot cost impact for the MUSD, NUSD & RSD Area and the PESD Area (collectively the “District Areas” or each a “District Area”).

To determine the school facilities cost impact per square foot of residential development, first the Facilities Cost Impact per Seat/Student determined in Table 7 is multiplied by the Projected Unhoused Students as shown in Table 5 for each school level and by District Area . The result of this computation is shown in Table 8 and reflects the estimated school facilities cost impact to house Projected Unhoused Students.

**TABLE 8
Total Facilities Cost Impact by District Area**

District Area/School Level	Facilities Cost Impact per Seat/Student	Projected Unhoused Students	Facilities Cost Impact Attributable to Unmitigated Projected Units
PESD Area			
Middle School (PESD)	\$40,000	23	\$920,000
High School (PESD)	\$90,385	340	\$30,730,900
Total PESD			\$24,605,739
MUSD,NUSD, &RSD Area			
High School (MUSD, NUSD & RSD)	\$33,260	2,039	\$67,817,140
Total MUSD, NUSD & RSD			\$67,817,140

The total school facilities impact shown in Table 8 above was then divided by the number of unmitigated Projected Units within each District Area shown in Table 2 to determine the school facilities cost per residential unit. The cost per residential unit for each District Area is shown in Table 9.

**TABLE 9
School Facilities Cost per Residential Unit by District Area**

District Area	Facilities Cost Allocation	Unmitigated Projected Units	Facilities Cost Impact per Residential Unit
PESD	\$24,605,739	4,914	\$5,007
MUSD, NUSD & RSD	\$67,817,140	14,530	\$4,667

The school facilities cost impact per residential square foot is calculated by dividing the school facilities cost per residential unit determined in Table 9 by the weighted average square footage of each residential unit type within the respective District Area. This calculation is shown in Table 10. The weighted average square footage square footage of the unmitigated Projected Units is estimated based on square footage information from residential development projects constructed within the School District in the past 5 years.

TABLE 10
School Facilities Cost per Residential Square Foot by District Area

District Area	Facilities Cost Impact per Residential Unit	Weighted Average Square Footage	Facilities Cost per Residential Square Foot
PESD	\$5,007	1,628	\$3.08
MUSD, NUSD & RSD	\$4,667	2,126	\$2.20

The school facilities impact per residential square foot determined in Table 10 is greater than the School District’s share of the current maximum authorized residential School Fees for the MUSD, NUSD & RSD Area and PESD Area of \$1.45 and \$2.07 per square foot, respectively. Therefore, the School District is justified in levying up to but not exceeding the maximum authorized amount for residential construction and reconstruction.

SECTION IV. COMMERCIAL/INDUSTRIAL SCHOOL IMPACT ANALYSIS

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

A. EMPLOYEE GENERATION

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

The employee generation estimates per 1,000 square feet of development derived from the Traffic Study are listed by commercial/industrial land use category in Table 11. The land use categories listed are based on those categories described in the Traffic Study and include all land uses recommended by the provisions of Education Code Section 17621(e)(1)(B).

**TABLE 11
Employee Generation per 1,000 Square Feet of Commercial/Industrial Development**

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

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

B. RESIDENTIAL IMPACT

1. Households

To evaluate the impact of commercial/industrial development on School District facilities, the employee generation estimates listed in Table 11 were first used to determine the impact of commercial/industrial development on a per household basis. Based on information derived from U.S. Census Bureau data⁵, there are approximately 1.32 employed persons per household on average for households located within the School District. Dividing the employee generation estimates listed in Table 11 by 1.32 results in the estimated number of households per 1,000 square feet of commercial/industrial development (“Total Household Impact”).

The Total Household Impact determined in the preceding paragraph takes into consideration all employees generated from commercial/industrial development. Since some of those employees will live outside the School District and will therefore have no impact on the School District, the figures are adjusted to reflect only those households within the School District occupied by employees generated from commercial/industrial development built within the School District. Based on information derived from U.S. Census Bureau data⁶, it is estimated that approximately twenty-one percent (20.82%) of employees both live and work within the School District. Multiplying the Total Household Impact by twenty-one percent (20.82%) results in the households within the School District impacted per 1,000 square feet commercial/industrial development. The results of these computations are shown in Table 12.

TABLE 12

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

Commercial/Industrial Category	School District Households per 1,000 Square Feet Com./Ind.
Banks	0.4458
Community Shopping Center	0.2422
Neighborhood Shopping Center	0.4415
Industrial Business Parks	0.5547
Industrial Parks/Warehousing/Manufacturing	0.2126
Rental Self-Storage	0.0102
Research & Development	0.4798
Hospitality(Lodging)	0.1787
Commercial Offices (Standard)	0.7557
Commercial Offices (Large High Rise)	0.7170
Corporate Offices	0.4236
Medical Offices	0.6730

⁵ 2022 American Community Survey 5-Year Estimates; DP04-Selected Housing; DP03-Economic Characteristics (Civilian Employed).

⁶ 2022 American Community Survey 5-Year Estimates; S0801-Commuting Characteristics (Work in place of residence).

2. Household Student Generation

The student generation impacts per 1,000 square feet of commercial/industrial development were calculated by multiplying the household impacts shown in Table 12 by blended student generation rates determined for each school level. The result of this calculation is shown in Table 13. The determination of student generation rates are shown and described in Appendix “D” of this Study.

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

Commercial/Industrial Category	Middle School Student Generation	High School Student Generation	Total Student Generation
Banks	0.0352	0.0605	0.0957
Community Shopping Center	0.0191	0.0329	0.0520
Neighborhood Shopping Center	0.0348	0.0600	0.0948
Industrial Business Parks	0.0438	0.0753	0.1191
Industrial Parks/Warehousing/ Manufacturing	0.0168	0.0289	0.0457
Rental Self-Storage	0.0008	0.0014	0.0022
Research & Development	0.0379	0.0652	0.1031
Hospitality (Lodging)	0.0141	0.0243	0.0384
Commercial Offices (Standard)	0.0596	0.1026	0.1622
Commercial Offices (Large High Rise)	0.0566	0.0974	0.1540
Corporate Offices	0.0334	0.0575	0.0909
Medical Offices	0.0531	0.0914	0.1445

3. Inter-District Student Impact

Based on information provided by the School District, 202 students were enrolled at the School District on an inter-district basis as of October 2023, including 11 students at the middle school level and 191 students at the high school level. Many of those inter-district students attend the School District as a result of their parents or guardians being employed at businesses located within the School District boundaries. To determine the inter-district impact of new commercial/industrial development, the number of inter-district students at each school level was first divided by the estimated number of employees within the School District’s area. Employment was estimated at 84,354⁷ based on data obtained from the U.S. Census Bureau. The ratio of inter-district students to estimated employment for each school level was then multiplied by the employee generation factors for each of the commercial/industrial categories as shown in Table 11. The calculation results in the Inter-District Student Impacts shown in Table 14.

⁷ 2022 American Community Survey 5-Year Estimates; DP03-Economic Characteristics (Civilian Employed).

TABLE 14
Inter-District Cost Impact per 1,000 Square Feet of Commercial/Industrial Development

Commercial/Industrial Category	Middle School Cost Impact	High School Cost Impact	Total Inter-District Cost Impact
Banks	0.0003	0.0065	0.0068
Community Shopping Center	0.0002	0.0035	0.0037
Neighborhood Shopping Center	0.0003	0.0064	0.0067
Industrial Business Parks	0.0004	0.0081	0.0085
Industrial Parks/ Warehousing/Manufacturing	0.0001	0.0031	0.0032
Rental Self-Storage	0.0000	0.0001	0.0001
Research & Development	0.0003	0.0070	0.0073
Hospitality (Lodging)	0.0001	0.0026	0.0027
Commercial Offices (Standard)	0.0005	0.0110	0.0115
Commercial Offices (Large High Rise)	0.0005	0.0105	0.0110
Corporate Offices	0.0003	0.0062	0.0065
Medical Offices	0.0004	0.0098	0.0102

4. Total Student Generation Impact

The Total Student Generation Impact is determined by adding the Student Generation Impacts shown in Table 13 to the Inter-District Impacts determined in Table 14. The Total Student Generation Impacts are listed in Table 15.

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

Commercial/Industrial Category	Middle School Cost Impact	High School Cost Impact	Total Student Generation Cost Impact
Banks	0.0355	0.0670	0.1025
Community Shopping Center	0.0193	0.0364	0.0557
Neighborhood Shopping Center	0.0351	0.0664	0.1015
Industrial Business Parks	0.0442	0.0834	0.1276
Industrial Parks/ Warehousing/Manufacturing	0.0169	0.0320	0.0489
Rental Self-Storage	0.0008	0.0015	0.0023
Research & Development	0.0382	0.0722	0.1104
Hospitality (Lodging)	0.0142	0.0269	0.0411
Commercial Offices (Standard)	0.0601	0.1136	0.1737
Commercial Offices (Large High Rise)	0.0571	0.1079	0.1650
Corporate Offices	0.0337	0.0637	0.0974
Medical Offices	0.0535	0.1012	0.1547

C. NET IMPACT PER COMMERCIAL/INDUSTRIAL SQUARE FOOT

1. Cost Impact

To estimate the school facilities costs required to house new students resulting from additional commercial/industrial development, the Facilities Cost Impact per Seat/Student determined in Table 7 is multiplied by the household impacts calculated in Table 15, resulting in the total school facilities cost impact per 1,000 square feet of commercial/industrial development. The total school facilities cost impacts are shown in Table 16 by commercial/industrial development category.

TABLE 16
School Facilities Costs per 1,000 Square Feet of Commercial/Industrial Development

Commercial/Industrial Category	Middle School Cost Impact	High School Cost Impact	Total School Facilities Cost Impact
Banks	\$417	\$2,228	\$2,645
Community Shopping Center	\$227	\$1,211	\$1,438
Neighborhood Shopping Center	\$413	\$2,208	\$2,621
Industrial Business Parks	\$520	\$2,774	\$3,294
Industrial Parks/ Warehousing/Manufacturing	\$199	\$1,064	\$1,263
Rental Self-Storage	\$9	\$50	\$59
Research & Development	\$449	\$2,401	\$2,850
Hospitality (Lodging)	\$167	\$895	\$1,062
Commercial Offices (Standard)	\$707	\$3,778	\$4,485
Commercial Offices (Large High Rise)	\$671	\$3,589	\$4,260
Corporate Offices	\$396	\$2,119	\$2,515
Medical Offices	\$629	\$3,366	\$3,995

2. Residential Fee Offsets

The total cost impacts determined in Table 16 represent the amounts required to fully mitigate the impact on school facilities, as a result of new commercial/industrial development within the School District. Many employees as a result of new commercial/industrial development will commute from areas outside of the School District boundaries or will reside in existing homes, from which no mitigation will be received from the housing in which they reside. However, new commercial/industrial development, and thereby new employee generation, will also increase the need for new residential development to house those employees living in the School District. Applicable Residential School Fees adopted by the School District under applicable law will also be imposed by the School District on such new residential development. To prevent new commercial/industrial development from paying the portion of impact that is mitigated by the Applicable Residential School Fees, this amount has been calculated and deducted from the school facilities impact costs calculated in Table 16.

The residential fee offsets are first calculated by using the Applicable Residential School Fee or the MUSD, NUSD & RSD Area of \$2.07 per square foot and multiplying that amount by the weighted average square footage of a residential unit in the MUSD, NUSD & RSD Area, which is 2,126 square feet. This calculation provides the average residential revenues from a residential unit of \$3,083 (\$1.45 x 2,126). Similarly, the residential fee offsets are first calculated by using the Applicable Residential School Fee or the PESD Area \$2.07 per square foot and multiplying that amount by the weighted average square footage of a residential unit in the PESD Area, which is 1,628 square feet. This calculation provides the average residential revenues from a residential unit of \$3,370 (\$2.07 x 1,628). The average residential revenues from a residential unit multiplied by the Household Impacts per 1,000 square feet of commercial/industrial development, as shown in Table 12, results in the residential school fee revenues per 1,000 square feet of commercial/industrial development (“Residential Fee Offset”). This computation is shown in Table 17 by District Area.

**TABLE 17
Residential Fee Offsets by District Area**

Commercial/ Industrial Category	School District Households per 1,000 Square Feet Com./Ind.	PESD Area		MUSD, NUSD & RSD Area	
		Residential Fee per Unit	Residential Fee Offset per 1,000 Square Feet Com./Ind.	Residential Fee per Unit	Residential Fee Offset per 1,000 Square Feet Com./Ind.
Banks	0.4458	\$3,370	\$1,502	\$3,083	\$1,374
Community Shopping Center	0.2422	\$3,370	\$816	\$3,083	\$747
Neighborhood Shopping Center	0.4415	\$3,370	\$1,488	\$3,083	\$1,361
Industrial Business Parks	0.5547	\$3,370	\$1,869	\$3,083	\$1,710
Industrial Parks/ Warehousing/ Manufacturing	0.2126	\$3,370	\$716	\$3,083	\$655
Rental Self-Storage	0.0102	\$3,370	\$34	\$3,083	\$31
Research & Development	0.4798	\$3,370	\$1,617	\$3,083	\$1,479
Hospitality (Lodging)	0.1787	\$3,370	\$602	\$3,083	\$551
Commercial Offices (Standard)	0.7557	\$3,370	\$2,547	\$3,083	\$2,330
Commercial Offices (Large High Rise)	0.7170	\$3,370	\$2,416	\$3,083	\$2,211
Corporate Offices	0.4236	\$3,370	\$1,428	\$3,083	\$1,306
Medical Offices	0.6730	\$3,370	\$2,268	\$3,083	\$2,075

3. Net School Facilities Costs

Subtracting the Residential Fee Offset determined in Table 17 from the total school facilities costs listed in Table 16 results in the net school facilities costs per 1,000 square feet of commercial/industrial development (“Net School Facilities Costs”). The Net School Facilities Costs are listed in Table 18.

TABLE 18
Net School Facilities Costs Per 1,000 Square Feet Commercial/Industrial Development

Commercial/Industrial Category	Total School Facilities Cost Impact	Residential Fee Offset	Net School Facilities Cost Impact
PESD Area			
Banks	\$2,645	\$1,502	\$1,143
Community Shopping Center	\$1,438	\$816	\$622
Neighborhood Shopping Center	\$2,621	\$1,488	\$1,133
Industrial Business Parks	\$3,294	\$1,869	\$1,425
Industrial Parks/ Warehousing/Manufacturing	\$1,263	\$716	\$547
Rental Self-Storage	\$59	\$34	\$25
Research & Development	\$2,850	\$1,617	\$1,233
Hospitality (Lodging)	\$1,062	\$602	\$460
Commercial Offices (Standard)	\$4,485	\$2,547	\$1,938
Commercial Offices (Large High Rise)	\$4,260	\$2,416	\$1,844
Corporate Offices	\$2,515	\$1,428	\$1,087
Medical Offices	\$3,995	\$2,268	\$1,727
MUSD, NUSD & RSD Area			
Banks	\$2,228	\$1,374	\$854
Community Shopping Center	\$1,211	\$747	\$464
Neighborhood Shopping Center	\$2,208	\$1,361	\$847
Industrial Business Parks	\$2,774	\$1,710	\$1,064
Industrial Parks/ Warehousing/Manufacturing	\$1,064	\$655	\$409
Rental Self-Storage	\$50	\$31	\$19
Research & Development	\$2,401	\$1,479	\$922
Hospitality (Lodging)	\$895	\$551	\$344
Commercial Offices (Standard)	\$3,778	\$2,330	\$1,448
Commercial Offices (Large High Rise)	\$3,589	\$2,211	\$1,378
Corporate Offices	\$2,119	\$1,306	\$813
Medical Offices	\$3,366	\$2,075	\$1,291

The Net School Facilities Cost Impacts determined in Table 18 were then divided by 1,000⁸ to provide the cost impact on a square foot basis. These cost impacts are listed in Table 19.

TABLE 19
Net School Facilities Cost Impacts Per Square Foot of Commercial/Industrial Development

Commercial/Industrial Category	Net School Facilities Cost Impacts per Square Foot (MUSD, NUSD & RSD)	Net School Facilities Cost Impacts per Square Foot (PESD)
Banks	\$0.85	\$1.14
Community Shopping Center	\$0.46	\$0.62
Neighborhood Shopping Center	\$0.85	\$1.13
Industrial Business Parks	\$1.06	\$1.43
Industrial Parks/ Warehousing/Manufacturing	\$0.41	\$0.55
Rental Self-Storage	\$0.02	\$0.03
Research & Development	\$0.92	\$1.23
Hospitality (Lodging)	\$0.34	\$0.46
Commercial Offices (Standard)	\$1.45	\$1.94
Commercial Offices (Large High Rise)	\$1.38	\$1.84
Corporate Offices	\$0.81	\$1.09
Medical Offices	\$1.29	\$1.73

The net school facilities cost impacts per commercial/industrial square shown in Table 19 are equal to or exceed the maximum authorized statutory school fee for commercial/industrial development in their respective areas; \$0.2352 per square foot in the MUSD, NUSD & RSD Area except for the category of Rental Self-Storage, \$0.3360 per square foot in the PESD Area except for the category of Rental Self-Storage. Therefore, the School District is justified in levying school fees on commercial/industrial development in an amount up to but not exceeding the maximum authorized statutory fee, or the net cost impacts determined for the categories Rental Self-Storage.

D. COMMERCIAL/INDUSTRIAL DEVELOPMENT NOT IN PRESCRIBED CATEGORIES

In cases where new commercial/industrial development does not fit within the prescribed categories shown in Table 11, the School District shall evaluate such development on a case-by-case basis to determine if the imposition of the School Fees on the development meets the nexus requirements set forth under Government Code Section 66000 et seq. The School District may levy School Fees on such development in an amount up to but not exceeding the cost per square foot impact determined through such evaluation.

E. AGE-RESTRICTED (SENIOR) HOUSING

The School District must exercise discretion in determining whether a particular project qualifies as “senior citizen housing” for the purpose of imposing developer fees. (See

⁸ The Employee Generation Rates derived from the SANDAG Traffic Study are estimated per 1,000 square feet of development.

California Ranch Homes Development Co. v. San Jacinto Unified School Dist. (1993) 17 Cal.App.4th 573, 580–581.) The School District acknowledges Section 65995.1 and will levy its share of School Fees on qualifying senior citizen housing projects at the current commercial/industrial rate of \$0.2352 per square foot in the MUSD, NUSD & RSD Area and \$0.3360 in the PESD area, as justified herein. The School District will require proof that such senior units are indeed restricted to seniors (i.e. a copy of the recorded CC&Rs or deed(s)) and reserves the right to revoke a Certificate of Compliance and/or require payment of difference of the amount per square foot paid to the then current amount of School Fees being levied on residential development per square foot should such Covenants, Conditions, and Restrictions (“CC&Rs”) or deed(s) be modified to allow students to reside in such the housing units. If there is any uncertainty as to whether a project qualifies as senior citizen housing or will, in fact, remain senior citizen housing beyond initial approval, the School District may wish to seek cooperation from the developer as a condition of levying the commercial/industrial School Fee rate. Such cooperation could take the form of an agreement by the developer to include a restriction in the recorded CC&Rs conditioning subsequent changes in residency requirements on the owner’s payment of applicable developer fees, and to notify the School District of changes in residency requirements and/or to provide current residency data upon School District’s request.

SECTION V. REDEVELOPMENT

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

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

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

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

SECTION VI. GOVERNMENT CODE SECTION 66000

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

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

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

Purpose of the School Fee

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

- i. Regular maintenance or routine repair of school buildings and facilities;
- ii. Inspection, sampling, analysis, encapsulation or removal of asbestos-containing material, except where incidental to school facilities construction or reconstruction for which the expenditure of fees or other consideration collected pursuant to Education Code Section 17620 is not prohibited; and,
- iii. Deferred maintenance as described in Education Code Section 17582.

Identify the Use of the School Fee

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

- i. Construction, reconstruction and/or refurbishment of school facilities required to accommodate students generated by new residential and commercial/industrial development in areas of the School District where school facilities are needed;
- ii. Construction, reconstruction and/or refurbishment of administrative and operations facilities required in response to new student growth from new development;
- iii. Acquisition or lease of property for unhoused students generated from new development;
- iv. Purchase or lease of interim and/or temporary school facilities in order to accommodate student capacity demands;
- v. Costs associated with the administration, collection, and justification for the Applicable School Fees;
- vi. Provide local funding that may be required if the School District applies for State funding through SB 50.

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

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

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

The imposition of the Applicable Residential School Fee of \$1.45 per square foot in the MUSD, NUSD & RSD Area and \$2.07 in the PESD area for residential development is justified as the fee is equal to or below the per square foot cost impacts to provide adequate school facilities required as a result of such new residential development.

Similarly, the imposition of the Applicable Com/Ind. School Fees of \$0.2352 per square foot in the MUSD, NUSD & RSD Area and \$0.3360 in the PESD area for commercial/industrial development is justified as the fee is equal to or below the estimated per square foot net cost impact to provide adequate school facilities required as a result of such new commercial/industrial development, except for Rental Self-Storage where a School Fee of \$0.0190 per square foot for the MUSD, NUSD & RSD Area and \$0.0250 per square foot for the PESD Area, is justified.

Accounting Procedures for the Fees

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

APPENDIX A

COMMERCIAL/INDUSTRIAL DEVELOPMENT DESCRIPTIONS

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

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

APPENDIX B FACILITIES CAPACITY UPDATE

Classroom Inventory

Site Name	Portable Classrooms	Permanent Classrooms	Total Classrooms
Middle School Totals	11	40	51
High School Totals	40	464	504
Total	51	504	555

Building Capacity

Description	7-8	9-12	Total
I. Total Classroom Inventory	51	504	555
II. Permanent Classrooms			504
III. Portable Classrooms			51
IV. 25% of Permanent Classrooms			126
V. Adjustment (III. Minus IV.)	1	-	1
IV. Total (I. minus V.)	50	504	554
Building Capacity¹	1,350	13,608	14,985

¹ School capacities are determined based on loading factors of 27 pupils per classroom for grades 7 through 12, as set forth in the California Code of Regulation, Title II, Section 1859.35.

APPENDIX C ENROLLMENT SUMMARY

School/Program	Middle		High				Grand Total
	7	8	9	10	11	12	
California Military Institute ¹	180	198	201	133	146	119	977
Heritage High School	-	-	621	607	677	625	2,530
Liberty High School	-	-	713	701	689	492	2,595
Independent Study	-	-	8	4	6	12	30
Paloma Valley High School	-	-	716	662	656	759	2,793
Pathways for Adult Life Skills	-	-	-	-	-	132	132
Perris High School	-	-	489	568	590	514	2,161
Perris Lake High School	-	-			41	266	307
Pinacate Middle School	484	502	-	-	-	-	986
Scholar Plus Online Learning	-	1	10	27	19	35	92
Grand Total	664	701	2,758	2,702	2,824	2,954	12,603
Eligible²		986				11,363	12,349

¹ Grades 5 and 6 omitted from the student calculations. The California Military Institute serves student through the district and operates as a High School therefore the 7th and 8th Grade students for this school are assigned to the high school level.

² Does not include Scholar Plus Online Learning school students and Pathways for Adult Life Skills

APPENDIX D STUDENT GENERATION RATES

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

The student enrollment address information was matched to the address (situs) information from the property characteristic/GIS data. The number of students matched was then queried by school level and residential category. Students could not be matched if they were inter-district or if they did not have a valid physical address (e.g. only P.O. Box was listed). Mobile homes are not considered in the SGR determination, and therefore have been omitted. The determination of the SGRs is summarized in Tables D-1 through D-4.

**TABLE D-1
Student Generation Rates**

School Level	SFD Units	SFA/MF Units
Middle School (7-8)	0.0980	0.0582
High School (9-12)	0.1614	0.0807
Total	0.2594	0.1389

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

School Level	No. of Students Matched	Total Units ¹	Student Generation Rate
Middle School (7-8)	751	7,662	0.0980
High School (9-12)	7,945	49,235	0.1614
Total	8,696	NA	0.2594

**TABLE D-3
Single Family Attached (SFA)/Multi-Family (MF) Student Generation Rates**

School Level	No. of Students Matched	Total Units ¹	Student Generation Rate
Middle School (7-8)	163	2,801	0.0582
High School (9-12)	554	6,861	0.0807
Total	717	NA	0.1389

¹ Obtained from the U.S. Census Bureau’s 2022 American Community Survey 5-Year Estimates

The student generation rates for each residential category listed in Table D-1 were blended into a single student generation rate for each school level based on the percentage allocation of Projected Units by District Area. The percentage allocations are shown in Table D-4.

TABLE D-4
Allocation of Net Projected Units by Residential Category

Residential Category	Total Projected Units (MUSD, NUSD & RSD)	Percentage Allocation	Total Projected Units (PESD)	Percentage Allocation
SFD	13,283	68.31%	2,553	51.95%
SFA/MF	6,161	31.69%	2,361	48.05%
Total	19,444	100.00%	4,914	100.00%

The Blended Student Generation Rates were determined by applying the percentage allocations, in Table D-4 by the Student Generation Rates shown in Table D-1, the results of which are shown in Table D-5.

TABLE D-5
Blended Student Generation Rates

School Level	Blended Student Generation Rate
Middle School	0.0789
High School	0.1358
Total	0.2147