



COOPERATIVE
STRATEGIES

COMPLETE FINANCIAL & DEMOGRAPHIC PLANNING FOR EDUCATION

WILLAM S. HART UNION HIGH SCHOOL DISTRICT

SCHOOL FACILITIES NEEDS ANALYSIS

APRIL 12, 2018

PREPARED FOR:

**William S. Hart Union
High School District**

21380 Centre Pointe Parkway
Santa Clarita, CA 91350
T 661.259.0033

PREPARED BY:

Cooperative Strategies

8955 Research Drive
Irvine, CA 92618
T 844.654.2421

TOC

SECTION	PAGE
EXECUTIVE SUMMARY -----	ES-1
I. GENERAL -----	1
II. ELIGIBILITY TO COLLECT ALTERNATIVE FEES -----	5
A. Eligibility to Receive State Funds -----	5
B. Statutory Requirements -----	5
C. Eligibility to Collect Alternative Fees -----	7
III. PROJECTED UNHOUSED STUDENTS FROM RESIDENTIAL DEVELOPMENT OVER THE NEXT FIVE YEARS -----	8
A. Projected Student Enrollment -----	8
B. Current Capacity -----	12
C. Projected Unhoused Students -----	12
IV. SURPLUS SCHOOL SITES AND EXISTING SURPLUS LOCAL FUNDS -----	13
V. ALTERNATIVE NO. 2 FEE -----	14
A. Alternative No. 2 Fee School Facility Costs -----	14
B. Credit for Local Funds -----	20
C. Alternative No. 2 Fee Calculation -----	21
VI. ALTERNATIVE NO. 3 FEE -----	24
A. Alternative No. 3 Fee School Facility Costs -----	24
B. Alternative No. 3 Fee Calculation -----	25
VII. SECTION 66000 OF THE GOVERNMENT CODE -----	26

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:	Bonding Capacity Calculation
EXHIBIT G:	Student Generation Rate Calculation
EXHIBIT H:	Correspondence with the City and County
EXHIBIT I:	Reconstruction
EXHIBIT J:	Updated School Facilities Capacity Calculation
EXHIBIT K:	Surplus Site Determination
EXHIBIT L:	Identification and Consideration of Local Funding Sources per Section 65995.5(c)(2) and Section 65995.6(b)(3)
EXHIBIT M:	Calculation of Additional Grants for General Site Development
EXHIBIT N:	Allocation of GO Bond Authorization

EXECUTIVE SUMMARY

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

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

A. Eligibility for New Construction Funding from the State

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

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

B. Compliance with Statutory Requirements

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

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

Statutory Requirements	Status
Substantial enrollment as defined in Section 65995.5(b)(3)(A) of its students on a multi-track year-round calendar	Not Met
Placed at least one (1) general obligation ("GO") bond measure on the ballot in the last four (4) years, and the measure received at least 50 percent plus one (1) of the votes cast	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. Because Newhall School District ("NSD"), Saugus Union School District ("SUSD"), and Sulphur Springs Union School District ("SSUSD") serve elementary school students (i.e., grades kindergarten through 6), and Castaic Union School District ("CUSD") serves elementary and junior high school students (i.e., grades kindergarten through 8), the Analysis identifies Alternative Fees by location. The Alternative No. 2 Fee and Alternative No. 3 Fee for the School District are listed in Table ES-2.

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

Fee	Units Located Within the CUSD Area of the School District	Units Located Within NSD, SUSD, & SSUSD
Alternative No. 2 Fee	\$1.81	\$2.72
Alternative No. 3 Fee	\$3.61	\$5.43

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

Therefore, the Alternative No. 2 Fees and the Alternative No. 3 Fees are reasonably related and roughly proportional to the cost of school facilities for the future development identified in the Analysis in accordance with applicable laws.

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

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

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

I. GENERAL

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

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

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

Eligibility to Collect Alternative Fees

Eligibility to Receive State Funds

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

Statutory Requirements

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

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

Projected Unhoused Students from Future Residential Development

Total Projected Student Enrollment

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

Excess Capacity

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

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

Projected Unhoused Students

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

Surplus Property and Existing Surplus Local Funds

Surplus Property

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

Existing Surplus Local Funds

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

Alternative No. 2 Fee

Student Capacity and Site Size of Future School Facilities

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

Site Acquisition and Site Development Costs

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

Total School Facility Costs per Student and Total School Facility Costs

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

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

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

Alternative No. 2 Fee

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

Alternative No. 3 Fee

Alternative No. 3 Fee

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

II. ELIGIBILITY TO COLLECT ALTERNATIVE FEES

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

A. Eligibility to Receive State Funds

The School District has taken action electing to participate in the SFP established by Section 17070.10 of the Education Code. Additionally, the School District authorized a designated representative to (i) approve, certify, and submit the SAB Forms 50-01, 50-02, and 50-03 to the SAB and (ii) request an Eligibility Determination for new construction funding as required by the SFP. The School District filed SAB Forms 50-01, 50-02, and 50-03 and requested an Eligibility Determination for new construction funding as required by the SFP on March 5, 1999. On May 26, 1999, the Eligibility Determination of the School District was approved by the SAB. Subsequently, the School District submitted updated SAB Forms 50-01, 50-02, and 50-03 as part of its ongoing facilities planning and financing program. The most current SAB Forms 50-01, 50-02, and 50-03 are incorporated herein as Exhibits A, B, and C, respectively. As shown in the School District's most current Eligibility Determination from the SAB (attached and incorporated as Exhibit D), the School District is eligible for new construction funding under the SFP for 3,646 students in grades 7 and 8; 5,146 students in grades 9 through 12; 772 non-severe special day class students; and 298 severe special day class students.

B. Statutory Requirements

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

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

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

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

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

2. General Obligation Bond Measure

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

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

3. Debt or Obligations for Capital Outlay

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

The School District has determined that this Statutory Requirement has been satisfied. The School District currently has \$422,449,487.40 in outstanding debt. This outstanding debt consists of \$352,349,487.40 from GO bonds and \$70,150,000.00 in special tax bonds. This debt represents 80.86 percent of the School District's bonding capacity (see Exhibit F for a calculation of the School District's bonding capacity).

4. **Relocatable Classrooms**

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

The School District has determined that this Statutory Requirement has been satisfied. The School District currently has a total of 664 permanent classrooms and 287 relocatable classrooms. This equates to a 30.18 percent relocatable classroom utilization rate.

C. **Eligibility to Collect Alternative Fees**

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

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

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

A. Projected Student Enrollment

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

1. Student Generation Rates

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

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

Based on residential data provided by the County, Cooperative Strategies was able to identify units that (i) were built in the last five (5) years and (ii) are representative of Future Units. Cooperative Strategies then obtained a database of all students within the School District in school year 2017/2018. The student database was then matched to parcels in the residential database and the number of students was queried based on the parcels to which they matched and whether or not the matching parcel was located within the CUSD boundary. Upon completion of such queries, Cooperative Strategies calculated SGRs for the three (3) unit types for the junior high school and high school levels. Table 1 below lists the SGRs by school level and land use, while Exhibit G contains specific numbers and counts used in calculating the SGRs.

Table 1
Student Generation Rates

School Level	SFD SGR	SFA SGR	MF SGR
Junior High School (Grades 7 & 8) ^[1]	0.0962	0.0941	0.0892
High School (Grades 9 - 12) ^[2]	0.1941	0.1568	0.2102
Total	0.2903	0.2509	0.2994
<i>[1] Excludes CUSD.</i>			
<i>[2] District-wide, including CUSD.</i>			

2. Future Units

Based on residential development projections prepared by Davis Demographics and Planning, Inc. ("DDP") and information provided by the Planning Departments of the City of Santa Clarita ("City") and the County, Cooperative Strategies estimates that the School District could experience the construction of 9,255 additional residential units over the next five (5) years (see Exhibit H for Cooperative Strategies' correspondence with the City and County). Of the 9,255 Future Units 8,162 are located within NSD, SUSD, and SSUSD (please refer to the map on the following page for a geographic profile of the School District). Table 2 distinguishes between mitigated and non-mitigated Future Units by unit type for the area within NSD, SUSD, and SSUSD, and Table 3 classifies mitigated and non-mitigated Future Units by unit type in the entire School District.

WILLIAM S. HART UNION HIGH SCHOOL DISTRICT

GEOGRAPHIC PROFILE

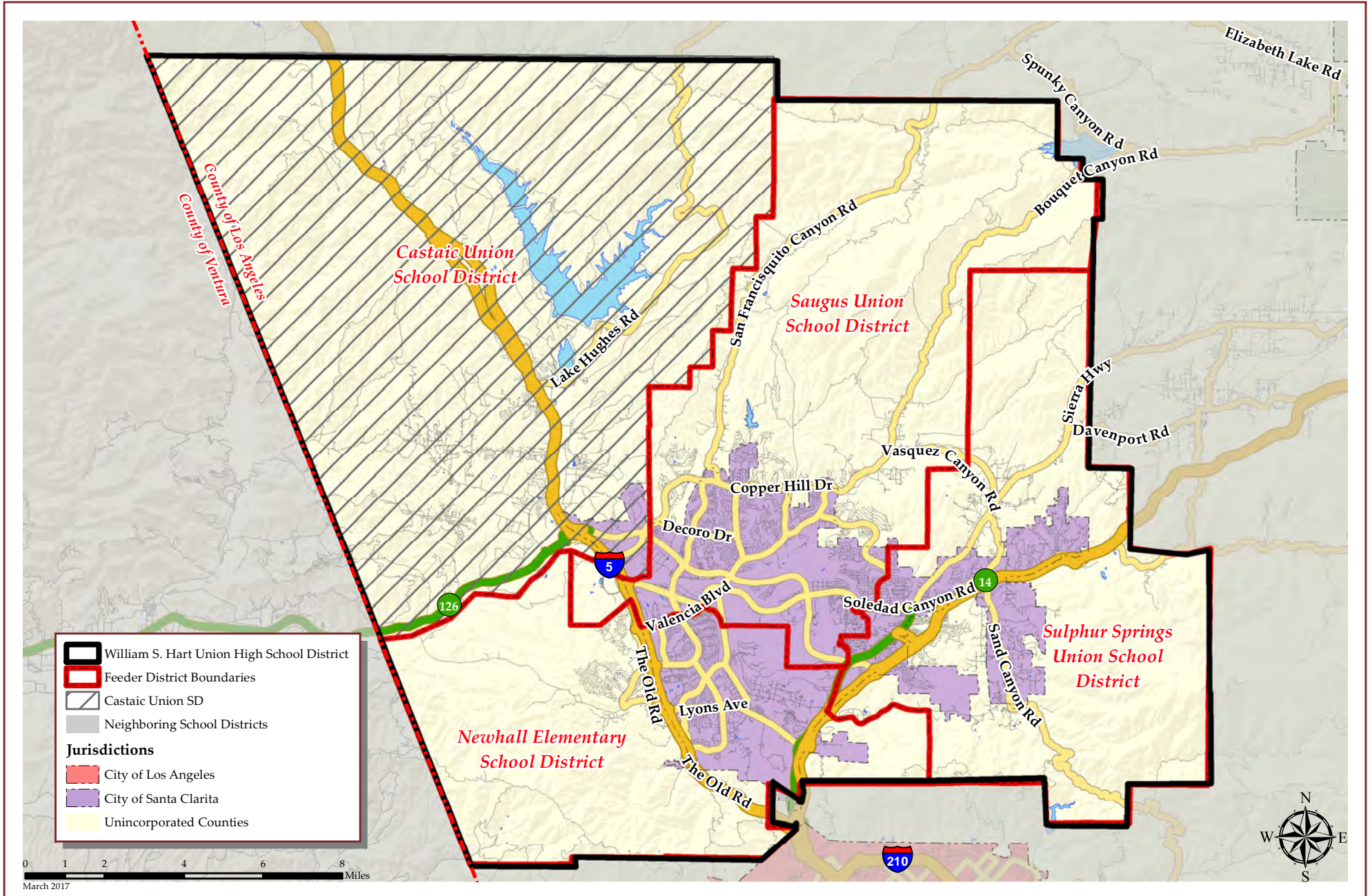


Table 2
Mitigated and Non-Mitigated Future Units by
Unit Type within NSD, SUSD, & SSUSD

Unit Type	Mitigated Future Units	Non-Mitigated Future Units	Total Future Units
Single Family Detached	2,125	1,269	3,394
Single Family Attached	2,066	299	2,365
Multifamily	2,091	312	2,403
Total Units	6,282	1,880	8,162

Table 3
Mitigated and Non-Mitigated Future Units by
Unit Type in the Entire School District

Unit Type	Mitigated Future Units	Non-Mitigated Future Units	Total Future Units
Single Family Detached	2,772	1,374	4,146
Single Family Attached	2,407	299	2,706
Multifamily	2,091	312	2,403
Total Units	7,270	1,985	9,255

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

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

3. Projected Student Enrollment

To calculate the Junior High School Projected Student Enrollment, the number of Future Units listed in Table 2 was multiplied by the Junior High School SGRs in Table 1. To calculate the High School Projected Student Enrollment, the number of Future Units listed in Table 3 was multiplied by the High School SGRs in Table 1. The results of these operations, according to school level, are shown in Table 4.

Table 4
Projected Student Enrollment

School Level	Students Generated from Mitigated Future Units	Students Generated from Non-Mitigated Future Units	Total Projected Students from Future Units
Junior High School	585	178	763
High School	1,355	380	1,735
Total	1,940	558	2,498

B. Current Capacity

Collectively, the School District's school facilities in school year 2017/2018 have a capacity of 21,014 seats per Section 17071.25 of the Education Code. Of these 21,014 seats, 6,428 are at the junior high school level and 14,586 are at the high school level. These capacities include seats from all new school facility construction projects funded by the State. Based on student enrollment data for school year 2017/2018, the enrollment of the School District is 22,246 students. As shown in Table 5, student enrollment exceeds facilities capacity at both the junior high school and high school levels in school year 2017/2018.

Table 5
Existing School Facilities Capacity and Student Enrollment

School Level	2017/2018 Facilities Capacity ^[1]	2017/2018 Student Enrollment ^[2]	Excess/ (Shortage) Capacity
Junior High (Grades 7-8)	6,428	6,985	(557)
High School (Grades 9-12)	14,586	15,261	(675)
Total	21,014	22,246	(1,232)

[1] See Exhibit B for SAB Form 50-02, and Exhibit J for the Updated School Facilities Capacity Calculation.

[2] Student enrollment from March 2018.

C. Projected Unhoused Students

As shown in Table 5, the School District's existing school facilities capacity is not adequate to house all the students currently being generated from existing residential units. Accordingly, the School District has no excess facilities capacity to house the Projected Student Enrollment. Therefore, the Projected Unhoused Students and the Projected Student Enrollment are identical.

IV. SURPLUS SCHOOL SITES AND EXISTING SURPLUS LOCAL FUNDS

Section 65995.6(b) states that the School District must identify and consider (i) surplus property, if any, owned by the School District that can be used as a school site or that is available for sale to finance school facilities, (ii) the extent to which projected enrollment growth can be accommodated at existing school facilities, and (iii) local sources that are available to finance the construction or reconstruction of school facilities needed to accommodate any growth in enrollment attributable to the construction of new residential units. Additionally, Section 65995.5(c)(2) requires the School District to subtract from the school facilities cost impact created by Future Units the amount of Local Funds that the governing board has dedicated to facilities necessitated by new residential units. To comply with Section 65995.6(b), the School District has identified and considered property it owns and has determined that it does possess six (6) sites that could be considered surplus (see Exhibit K for information on these sites). The Governing Board will review and re-adopt this Analysis annually, including a review of this determination and any need to consider property that may then be surplus to fund school facilities required to accommodate students being generated from existing residential units, or other students.

As for identifying and considering existing excess capacity that could accommodate the Projected Student Enrollment generated from non-mitigated Future Units, Table 5 in Section III.B. of this Analysis illustrates that the School District does not have adequate seats to house all of the students currently being generated from existing residential units.

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

V. ALTERNATIVE NO. 2 FEE

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

A. Alternative No. 2 Fee School Facility Costs

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

1. Per-Pupil Grant Amounts

The per-pupil grant amounts identified in Section 17072.10(a) of the Education Code were adjusted by the SAB on January 24, 2018, pursuant to Section 17072.10(b) of the Education Code. The per-pupil grant amounts specified in Section 17072.10 are adjusted annually by the SAB to reflect construction cost changes as set forth in the statewide cost index for class B construction. Further, pursuant to SAB Regulation 1859.71.2 and Section 17074.56 of the Education Code, the per-pupil grants have been increased to account for automatic fire alarm detection systems and fire sprinkler systems. Table 6 shows the base per-pupil grant amounts.

Table 6
Base Per-Pupil Grant Amounts (2018\$)

School Level	Per-Pupil Grant Amount	Additional Grants for Auto Alarm and Fire Sprinkler System	Base Per-Pupil Grant Amount
Junior High School	\$12,234	\$249	\$12,483
High School	\$15,567	\$271	\$15,838

In addition to the base per-pupil grant amounts shown in Table 6, 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 junior high school projects, (ii) 3.75 percent of the base per-pupil grants for high school projects and (iii) a grant of \$18,827 per new useable acre acquired for new school construction. To determine the general site development grant for each school level, Cooperative Strategies first applied the percentages mentioned above to the base per-pupil grant amounts shown in Table 6.

Second, Cooperative Strategies applied the grant per new useable acre mentioned above to the student capacity of future school facilities and corresponding site size requirements for the School District listed in Table 9 to derive a grant amount per student (see Exhibit M for more information on the calculation of the additional grants for general site development). Table 7 shows these additional grants as well as the total per-pupil grant amount.

Table 7
Total Per-Pupil Grant Amount (2018\$)

School Level	Base Per-Pupil Grant Amount	Additional Grants for General Site Development	Total Per-Pupil Grant Amount
Junior High School	\$12,483	\$1,102	\$13,585
High School	\$15,838	\$949	\$16,787

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

2. Total New School Construction Grants

To determine the total new school construction grants under Section 65995.5, the number of Projected Unhoused Students to be generated from non-mitigated Future Units, as shown in Table 4, is multiplied by the total per-pupil grant amounts set forth in Section 17072.10(a) and (b) of the Education Code, as shown in 7. Table 8 shows the total new school construction grants of the School District pursuant to Section 65995.5(c)(1).

Table 8
Total New School Construction Grants for Projected
Unhoused Students from Non-Mitigated Future Units (2018\$)
(In Accordance with Section 65995.5(c)(1) of the Government Code)

School Level	Projected Unhoused Students	Total Per-Pupil Grant Amount	Total New Construction Grants
Junior High School	178	\$13,585	\$2,418,130
High School	380	\$16,787	\$6,379,060
Total	558	N/A	\$8,797,190

3. Total School Site Acquisition and Site Development Costs

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

a. Site Size Requirement

To calculate the amount of site acquisition and site development costs that may be included in the Alternative No. 2 Fee, a school district must determine the student capacity of future school facilities that will be needed to accommodate the Projected Unhoused Students, as well as students to be generated from residential development anticipated to occur over the next 20 years. Based on the educational programs of the School District, the School District has determined that future junior high school facilities will be designed to accommodate 1,200 students and future high school facilities will be designed to accommodate 2,600 students. Based on these capacities, the guidelines included in the "School Site Analysis and Development Handbook" published by the State Department of Education as that handbook read as of January 1, 1998, identify the following site sizes for the School District.

Table 9
Student Capacities and Site Sizes of Future School Facilities

School Level	Student Capacity	Site Size (Acres)
Junior High School	1,200	22.50
High School	2,600	49.00

It should be emphasized that the site sizes shown in Table 9 are based on site sizes recommended by the State Department of Education as of January 1, 1998. Since that time, the State Department of Education has prepared a revised Handbook that contains site size recommendations more consistent with School District policy. Please refer to Exhibit E for the site sizes more consistent with the revised Handbook.

b. Site Acquisition and Site Development Costs per Acre

Based on appraisals prepared by Overland, Pacific & Cutter, Inc. and Epic Land Solutions, Inc., the School District believes a reasonable estimate for site acquisition is \$1,092,317 per acre at the junior high school level and \$760,135 per acre at the high school level. These amounts are based on appraisals prepared for the Newhall Ranch Junior High School site in Valencia (November 2013), and Romero Canyon High School site in Castaic (July 2016).

In determining the appropriate site development costs for the junior high school level, Cooperative Strategies used site development costs for Rancho Pico Junior High School approved by the State Office of Public School Construction ("OPSC"). Based on this information, Cooperative Strategies estimated site development costs to be \$53,196 per acre at the junior high school level. Site development costs for the high school level is \$36,882 per acre based on additional site development costs incurred by the School District in excess of the appraised value of the Romero Canyon Site and required to bring the site to a construction-ready condition. Table 10 lists the total estimated site acquisition costs and site development costs of the School District in accordance with Section 65995.5(h).

Table 10
Site Acquisition and Site Development Costs of Future School Facilities (2018\$)

School Level	Site Acquisition Cost ^[1]	Site Development Cost ^[1]	Total Site Cost
Junior High School	\$24,577,133	\$1,196,910	\$25,774,043
High School	\$37,246,615	\$1,807,218	\$39,053,833
<i>[1] The site acquisition and site development costs are equal to the per acre costs listed above multiplied by the number of acres, as listed in Table 9.</i>			

c. School Facilities Needed

To ensure that non-mitigated Future Units are being charged an Alternative No. 2 Fee that is reasonably related to the school facilities that are required to house the Projected Unhoused Students to be generated from non-mitigated Future Units, the School District must identify the number of future school facilities that will be needed to house the Projected Unhoused Students to be generated from non-mitigated Future Units, as well as students to be generated from mitigated Future Units and residential development anticipated to occur over the next 20 years. To calculate the number of school facilities that the School District will need to adequately house the Projected Unhoused Students, the number of Projected Unhoused Students for each school level, as listed in Table 4, was divided by the applicable student capacity, as listed in Table 9. The number of school sites expected to be needed to house the Projected Unhoused Students generated from non-mitigated Future Units is shown in Table 11.

Table 11
School Facilities Needed

School Level	Total Facilities Needed	Facilities Needed for Students Generated from Mitigated Future Units	Facilities Needed for Students Generated from Non-Mitigated Future Units
Junior High School	0.636	0.488	0.148
High School	0.667	0.521	0.146

It is important to realize that while the number of Projected Unhoused Students from non-mitigated Future Units equates only to approximately 14.8 percent of a junior high school and 14.6 percent of a high school, the School District will need to construct at least one (1) junior high school and one (1) high school in the future to accommodate (i) existing unhoused students, (ii) students generated from mitigated Future Units, (iii) students generated from non-mitigated Future Units, and (iv) students generated from future residential units beyond the next five (5) years.

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

The calculation of the total school site acquisition and site development cost impacts under Section 65995.5(h) is a two-step process. The first step involves calculating the total school site acquisition and site development costs related to the Projected Unhoused Students generated from non-mitigated Future Units. The calculation of this first step is shown in Table 12.

Table 12
Total School Site Acquisition and Site Development
Costs for Students from Non-Mitigated Future Units (2018\$)

School Level	Facilities Needed for Students Generated from Non-Mitigated Future Units	Site Cost	Total Site Costs ^[1]
Junior High School	0.148	\$25,774,043	\$3,814,558
High School	0.146	\$39,053,833	\$5,701,860
<i>[1] Numbers may not sum due to rounding.</i>			

Only a portion of the total site costs may be included in the calculation of the Alternative No. 2 Fee. Accordingly, the total school site acquisition and site development costs under Section 65995.5(h) must be reduced by half to arrive at the Alternative Fee No. 2 Site Costs. The calculation of this step is shown in Table 13.

Table 13
Alternative No. 2 Fee Site Costs (2018\$)
(In Accordance with Section 65995.5(h) of the Government Code)

School Level	Total Site Costs	Multiplier	Alternative No. 2 Fee Site Cost
Junior High School	\$3,814,558	50.00%	\$1,907,279
High School	\$5,701,860	50.00%	\$2,850,930

4. Alternative No. 2 Fee School Facility Costs

As stated previously, the initial step in calculating the maximum Alternative No. 2 Fee is to identify (i) the total new school construction grant, and (ii) the site acquisition and development costs pursuant to Section 65995.5(h). The sum of these amounts, which is the Alternative No. 2 Fee School Facility Costs, is the maximum amount of school facility costs that may be included in the Alternative No. 2 Fee before any local fund credits are applied. For the School District, the total new school construction grant is \$8,797,190 and the total site acquisition and site development cost pursuant to Section 65995.5(h) is \$4,758,209. These costs and the Alternative No. 2 Fee School Facility Costs are shown by school level in Table 14.

Table 14
Alternative No. 2 Fee School Facility Costs (2018\$)
(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
Junior High School	\$2,418,130	\$1,907,279	\$4,325,409
High School	\$6,379,060	\$2,850,930	\$9,229,990
Total	\$8,797,190	\$4,758,209	\$13,555,399

B. Credit for Local Funds

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

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

Item	Junior High School Amounts	High School Amounts
Alternative No. 2 Fee School Facility Costs	\$4,325,409	\$9,229,990
Credit for Existing Surplus Local Funds	\$0	\$0
Net Alternative No. 2 Fee School Facility Costs	\$4,325,409	\$9,229,990

C. Alternative No. 2 Fee Calculation

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

1. Average Square Footage per Unit

In order to project the total square footage of assessable space of the non-mitigated Future Units, the Analysis must estimate the average square footage of Future SFD Units, Future SFA Units, and Future MF Units to be constructed in the School District. To calculate the Alternative Fees at the junior high school level, Cooperative Strategies has estimated the average square footage of Future SFD Units, Future SFA Units, and Future MF Units, excluding development within the CUSD portion of the School District. For the high school level, Cooperative Strategies has estimated the average square footage of Future SFD Units, Future SFA Units, and Future MF Units for development within the entire School District. Cooperative Strategies has estimated that Future SFD Units will contain an average of 3,131 assessable square feet at the junior high school level and 3,143 assessable square feet at the high school level, while Future SFA Units will contain 1,598 assessable square feet and Future MF Units will contain 1,000 assessable square feet at both the junior high school and high school levels (see Exhibit H).

2. Total Square Footage of Assessable Space

To calculate the total square footage of assessable space for non-mitigated Future Units applicable to the junior high school level, the average square footage of Future SFD Units, Future SFA Units, and Future MF Units listed above was multiplied by the number of non-mitigated Future Units listed in Table 2 . The results of this operation are shown in Table 16.

Table 16
Estimated Total Residential Square Footage of Non-Mitigated
Future Units Applicable to the Junior High School Level Alternative Fees

Land Use	Non-Mitigated Future Units	Average Square Footage	Total Square Footage
Single Family Detached	1,269	3,131	3,973,239
Single Family Attached	299	1,598	477,802
Multifamily	312	1,000	312,000
Total	1,880	N/A	4,763,041

To calculate the total square footage of assessable space for non-mitigated Future Units applicable to the high school level Alternative Fees, the average square footages of Future SFD Units listed above were multiplied by the number of non-mitigated Future Units listed in Table 3. The results of this operation are shown in Table 17.

Table 17
Estimated Total Residential Square Footage of Non-Mitigated
Future Units Applicable to the High School Level Alternative Fees

Land Use	Non-Mitigated Future Units	Average Square Footage	Total Square Footage
Single Family Detached	1,374	3,143	4,318,482
Single Family Attached	299	1,598	477,802
Multifamily	312	1,000	312,000
Total	1,985	N/A	5,108,284

The projected total square footage of non-mitigated future residential units identified in Tables 16 and 17 includes units that may result from Reconstruction. For additional information regarding the imposition of the Alternative No. 2 Fee and Alternative No. 3 Fee on Reconstruction please refer to Exhibit I.

3. Calculation of Alternative No. 2 Fee

To calculate the Alternative No. 2 Fee, the Net Alternative No. 2 Fee School Facility Costs, as listed in Table 15, were divided by the total square footage of assessable space of the non-mitigated Future Units, as listed in Tables 16 and 17. Table 18 provides the Alternative No. 2 Fee that can be adopted by the School District.

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

Item	JHS Amount/ Square Footage	HS Amount/ Square Footage
Net Alternative No. 2 Fee School Facility Costs	\$4,325,409	\$9,229,990
Total Residential Square Footage	4,763,041	5,108,284
Alternative No. 2 Fee	\$0.91	\$1.81

In conclusion, the Alternative No. 2 fee for non-mitigated Future Units constructed within the CUSD area of the School District is \$1.81 per square foot while the Alternative No. 2 Fee for non-mitigated Future Units constructed within the NSD, SUSD, and SSUSD area of the School District is \$2.72 per square foot. Table 19 lists the Alternative No. 2 Fees of the School District based on whether the non-mitigated Future Units are located within the CUSD area of the School District or within the NSD, SUSD, and SSUSD area of the School District.

Table 19
Total Alternative No. 2 Fees Based on Location (2018\$)

School Level	Units Located Within the CUSD Area of the School District	Units Located Within NSD, SUSD, & SSUSD
Junior High School	N/A	\$0.91
High School	\$1.81	\$1.81
Total	\$1.81	\$2.72

VI. ALTERNATIVE NO. 3 FEE

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

A. Alternative No. 3 Fee School Facility Costs

Pursuant to Section 65995.7, the Alternative No. 3 Fee School Facility Cost, which is the maximum amount of school facility costs that may be included in the Alternative No. 3 Fee, is calculated by increasing the Net Alternative No. 2 Fee School Facility Costs by an amount not to exceed the Alternative No. 2 Fee School Facility Costs. As required by Section 65995.7, this amount has been reduced by the amount of local funds (\$0 in the case of the School District) identified pursuant to Section 65995.5(c)(2). Accordingly, Table 20 shows the Net Alternative No. 2 Fee School Facility Costs previously shown in Table 15 and adds to that amount the Alternative No. 2 Fee School Facility Costs previously shown in Table 14. The results, shown in Table 20, are the Alternative No. 3 Fee School Facility Costs applicable to both the junior high and high school level.

Table 20
Alternative No. 3 Fee School Facility Costs (2018\$)
(In Accordance with Section 65995.7 of the Government Code)

Item	Junior High School Level	High School Level
Net Alternative No. 2 Fee School Facility Costs	\$4,325,409	\$9,229,990
Alternative No. 2 Fee School Facility Costs	\$4,325,409	\$9,229,990
Alternative No. 3 Fee School Facility Costs	\$8,650,818	\$18,459,980

B. Alternative No. 3 Fee Calculation

To calculate the Alternative No. 3 Fee, the Alternative No. 3 Fee School Facility Costs were divided by the total square footage of assessable space of the non-mitigated Future Units applicable to the junior high school and high school levels listed in Table 16 and Table 17, respectively. This calculation is required by Section 65995.5(c)(3) and outlined in Section V.C. of the Analysis. Table 21 provides the Alternative No. 3 Fee that can be levied by the School District on new residential development where permitted by applicable law.

Table 21
Alternative No. 3 Fee (2018\$)

Item	Junior High School Level	High School Level
Alternative No. 3 Fee School Facility Costs	\$8,650,818	\$18,459,980
Total Residential Square Footage	4,763,041	5,108,284
Alternative No. 3 Fee	\$1.82	\$3.61

It should be noted that Section 65995.7(b) offers a reimbursement election to the person(s) subject to Alternative No. 3 Fees for the supplemental fees paid by such person(s), to the extent State funding has been received for the construction of facilities which required the collection of such fees.

In conclusion, the Alternative No. 3 Fee for non-mitigated Future Units constructed within the CUSD are of the School District is \$3.61 per square foot while the Alternative No. 3 Fee for non-mitigated Future Units constructed within the NSD, SUSD, and SSUSD area of the School District is \$5.43 per square foot. Table 22 lists the Alternative No. 3 Fees within the School District based on whether the non-mitigated Future Units are located within the CUSD area of the School District or within the NSD, SUSD, and SSUSD area of the School District.

Table 22
Total Alternative No. 3 Fees Based on Location (2018\$)

School Level	Units Located Within the CUSD Area of the School District	Units Located Within NSD, SUSD, & SSUSD
Junior High School	N/A	\$1.82
High School	\$3.61	\$3.61
Total	\$3.61	\$5.43

VII. SECTION 66000 OF THE GOVERNMENT CODE

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

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

New residential development in the School District, as shown in the Analysis, will generate additional students who will require the School District to provide additional school facilities. The amount to be included in the Alternative Fees is specified by statute. The Alternative No. 2 Fee of \$1.81 per square foot for units located within CUSD and \$2.72 for units located within NSD, SUSD, and SSUSD, and the Alternative No. 3 Fee of \$3.61 per square foot for units located within CUSD and \$5.43 for units located within NSD, SUSD, and SSUSD are justified in the Analysis. The estimated average school facilities cost impacts on the School District per square foot of residential development as estimated in Exhibit E is \$5.92 for units located within CUSD and \$8.81 for units located within NSD, SUSD, and SSUSD. As the actual school facilities cost impacts per square foot of residential construction is greater than the Alternative Fees, it is reasonable for the School District to determine that the Alternative No. 2 Fees and the Alternative No. 3 Fees are roughly proportional and reasonably related to the actual impacts caused by residential development on the School District.

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

By way of summary, the Analysis shows that non-mitigated Future Units will produce additional junior high school and high school students and that the School District does not have the capacity or funds to accommodate all of those additional students. Alternative Fees, therefore, will be used to fund (i) new junior high school and high school facilities, (ii) expansion of existing junior high school, and high 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.

S:\Clients\William S. Hart Union High SD\Demographics\SFNA\SY1718\Reports\Final\SFNA_WSHUHSD_1718_Fn.doc

EXHIBIT A

Updated SAB Form 50-01

STATE OF CALIFORNIA
ENROLLMENT CERTIFICATION/PROJECTION
 SAB 50-01 (REV 05/09)

STATE ALLOCATION BOARD
 OFFICE OF PUBLIC SCHOOL CONSTRUCTION
 Page 6 of 6

SCHOOL DISTRICT William S Hart Union High School District	FIVE DIGIT DISTRICT CODE NUMBER (see California Public School Directory) 65136
COUNTY Los Angeles	HIGH SCHOOL ATTENDANCE AREA (HSAA) OR SUPER HSAA (if applicable) for 9-12 projection

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

Part G. Number of New Dwelling Units

(Fifth-Year Projection Only)

10898

Part H. District Student Yield Factor

(Fifth-Year Projection Only)

0.2

Part A. K-12 Pupil Data

Grade	7th Prev.	6th Prev.	5th Prev.	4th Prev.	3rd Prev.	2nd Prev.	Previous	Current
	/	/	/	/	2013 / 2014	2014 / 2015	2015 / 2016	2016 / 2017
K					3533	3760	3877	3785
1					3433	3296	3138	3285
2					3676	3550	3290	3171
3					3684	3774	3531	3328
4					3734	3768	3755	3585
5					3764	3816	3828	3776
6					3837	3821	3821	3865
7					3752	3697	3655	3646
8					3801	3833	3696	3657
9					4093	4062	4044	3983
10					4010	4059	4005	4031
11					3822	3829	3939	3887
12					3706	3753	3693	3703
TOTAL					48845	49018	48272	47702

Part B. Pupils Attending Schools Chartered By Another District

7th Prev.	6th Prev.	5th Prev.	4th Prev.	3rd Prev.	2nd Prev.	Previous	Current
				149	200	172	181

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

Grade	7th Prev.	6th Prev.	5th Prev.	4th Prev.	3rd Prev.	2nd Prev.	Previous	Current
9					9	20	3	1
10					32	23	17	1
11					137	162	108	108
12					383	374	381	351
TOTAL					561	569	509	461

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

	Elementary	Secondary	TOTAL
Non-Severe	0	629	629
Severe	0	534	534
TOTAL	0	1163	

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
/	/	/	/	2013 / 2014	2014 / 2015	2015 / 2016	2016 / 2017

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

Part I. Projected Enrollment

1. Fifth-Year Projection

Enrollment/Residency - (except Special Day Class pupils)

K-6	7-8	9-12	TOTAL
0	7064	16612	23676

Special Day Class pupils only - Enrollment/Residency

	Elementary	Secondary	TOTAL
Non-Severe	0	590	590
Severe	0	501	501
TOTAL	0	1091	

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			

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)

Michael Otavka

SIGNATURE OF DISTRICT REPRESENTATIVE



DATE

11/8/16

TELEPHONE NUMBER

(661) 259-0033 Ext 274

E-MAIL ADDRESS

motavka@hartdistrict.org

STATE OF CALIFORNIA
ENROLLMENT CERTIFICATION/PROJECTION
 SAB 50-01 (REV 05/09)

STATE ALLOCATION BOARD
 OFFICE OF PUBLIC SCHOOL CONSTRUCTION
 Page 6 of 6

SCHOOL DISTRICT William S Hart Union High School District	FIVE DIGIT DISTRICT CODE NUMBER (see California Public School Directory) 65136
COUNTY Los Angeles	HIGH SCHOOL ATTENDANCE AREA (HSAA) OR SUPER HSAA (if applicable) for 7-8 projection

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

Part G. Number of New Dwelling Units

(Fifth-Year Projection Only)

10898

Part H. District Student Yield Factor

(Fifth-Year Projection Only)

0.2

Part I. Projected Enrollment

1. Fifth-Year Projection

Enrollment/Residency - (except Special Day Class pupils)

K-6	7-8	9-12	TOTAL
0	8183	0	8183

Special Day Class pupils only - Enrollment/Residency

	Elementary	Secondary	TOTAL
Non-Severe	0	0	0
Severe	0	0	0
TOTAL	0	0	

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 A. K-12 Pupil Data

Grade	7th Prev.	6th Prev.	5th Prev.	4th Prev.	3rd Prev.	2nd Prev.	Previous	Current
	/	/	/	/	2013 / 2014	2014 / 2015	2015 / 2016	2016 / 2017
K					3261	3491	3624	3533
1					3192	3083	2927	3075
2					3369	3308	3083	2971
3					3397	3456	3295	3135
4					3440	3481	3451	3354
5					3457	3515	3550	3477
6					3539	3511	3533	3600
7					3430	3394	3364	3355
8					3478	3508	3402	3370
9					0	0	0	0
10					0	0	0	0
11					0	0	0	0
12					0	0	0	0
TOTAL					30563	30747	30229	29870

Part B. Pupils Attending Schools Chartered By Another District

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

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

Grade	7th Prev.	6th Prev.	5th Prev.	4th Prev.	3rd Prev.	2nd Prev.	Previous	Current
9					0	0	0	0
10					0	0	0	0
11					0	0	0	0
12					0	0	0	0
TOTAL					0	0	0	0

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

	Elementary	Secondary	TOTAL
Non-Severe	0	0	0
Severe	0	0	0
TOTAL	0	0	

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
/	/	/	/	2013 / 2014	2014 / 2015	2015 / 2016	2016 / 2017

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

☐ County Birth Data ☐ Birth Data by District ZIP Codes ☐ Estimate ☐ Estimate ☐ Estimate

8th Prev.	7th Prev.	6th Prev.	5th Prev.	4th Prev.	3rd Prev.	2nd Prev.	Previous	Current

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

• I am designated as an authorized district representative by the governing board of the district.

• If the district is requesting an augmentation in the enrollment projection pursuant to Regulation Section 1859.42.1 (a), the local planning commission or approval authority has approved the tentative subdivision map used for augmentation of the enrollment and the district has identified dwelling units in that map to be contracted. All subdivision maps used for augmentation of enrollment are available at the district for review by the Office of Public School Construction (OPSC).

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

NAME OF DISTRICT REPRESENTATIVE (PRINT OR TYPE)

Michael Otavka

SIGNATURE OF DISTRICT REPRESENTATIVE



DATE

11/8/16

TELEPHONE NUMBER

(661) 259-0033 Ext 274

E-MAIL ADDRESS

motavka@hartdistrict.org

EXHIBIT B

Updated SAB Form 50-02

STATE OF CALIFORNIA
EXISTING SCHOOL BUILDING CAPACITY

SAB 92-10 (REV. 01/01) (Rev. 08/01/00)

SCHOOL DISTRICT

WILLIAM S. HART UNION HIGH

COUNTY

ANGELES

THE DISTRICT OFFICE MUST BE COMPLETED BY THE DISTRICT

85138

FROM SCHOOL OFFICE (SAB 92-10) (Rev. 08/01/00)

STATE ALLOCATION BOARD

OFFICE OF PUBLIC SCHOOL CONSTRUCTION

PAGE 4 OF 4

PART I - Classroom Inventory NEW ADJUSTED

Line 1. Leased State Relocatable Classrooms	48	108			156
Line 2. Portable Classrooms leased less than 5 years	2				2
Line 3. Interim Housing Portables leased less than 5 years					
Line 4. Interim Housing Portables leased at least 5 years					
Line 5. Portable Classrooms leased at least 5 years					
Line 6. Portable Classrooms owned by district	12	23			35
Line 7. Permanent Classrooms	71	242	42		355
Line 8. Total (Lines 1 through 7)	134	371	42		547

PART II - Available Classrooms

a. Part I, line 4					
b. Part I, line 5					
c. Part I, line 6	12	23			35
d. Part I, line 7	71	242	42		355
e. Total (a, b, c, & d)	83	265	42		390

a. Part I, line 8	134	371	42		547
b. Part I, lines 1, 2, 5 and 6 (total only)					182
c. 25 percent of Part I, line 7 (total only)					89
d. Subtract c from b (unless 0 if negative)	34	65			103
e. Total (a minus d)	100	306	42		448

PART III - Determination of Existing School Building Capacity

Line 1. Classroom capacity	2,241	7,158	645	
Line 2. SER adjustment	134	430	33	
Line 3. Operational Grants				
Line 4. Greater of line 2 or 3	134	430	33	
Line 5. Total of lines 1 and 4	2,375	7,588	678	

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

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

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

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

SIGNATURE OF DISTRICT REPRESENTATIVE

DATE

2/1/01

EXHIBIT C

Updated SAB Form 50-03

SAB 50-02 (REV. 10/1999)

SCHOOL DISTRICT

WILLIAM S. HART UNION HIGH

BUSINESS ADDRESS

21015 Rockview Drive

San Diego, CA 91350-2948

FOR DISTRICT CODE NUMBER (see District Public School Directory)

86136

HIGH SCHOOL ATTENDANCE AREA (if applicable)

COUNTY

LOS ANGELES

Part I- The following individual(s) have been designated as district representative(s) by the School Board

DISTRICT REPRESENTATIVE

TELEPHONE NUMBER

E-MAIL ADDRESS

Robert Lee

(818) 258-0033

DISTRICT REPRESENTATIVE

TELEPHONE NUMBER

E-MAIL ADDRESS

Part II ☒ District requests its eligibility determination be reviewed/approved by the Board.

Part III - New Construction Eligibility

	K-6	7-8	9-12
1. Projected Enrollment (Part G, Form SAB 50-01)		7,270	14,335
2. Existing School Building Capacity (Part F, line 5 of Form SAB 50-02)		6,074	7,305
3. New Construction Baseline Eligibility (line 1 minus line 2)		3,196	7,030

Part IV - Modernization Eligibility (choose only one option)

1. School Name:	Canyon High School	Grade Level	
Option A		K-6	7-8 9-12
2. Permanent classrooms at least 25 years old			
3. Portable classrooms at least 20 years old			
4. Total (lines 2 and 3)			
5. Multiply line 4 by 25 for K-6 and 27 for 7-8 and 9-12			
6. CBEDS enrollment at school			
7. Modernization Eligibility (lesser of totals of line 5 or 6)			

Option B

2. Permanent space at least 25 years old (report by classroom or square footage)	141,415
3. Portable space at least 20 years old (report by classroom or square footage)	
4. Total (lines 2 and 3)	141,415
5. Remaining permanent or portable space (report by classroom or square footage)	23,040
6. Total (lines 4 and 5)	164,455
7. Percentage (Divide line 4 by line 6)	86%
8. CBEDS enrollment at this school	2,267
9. Modernization Eligibility (Multiply line 7 by line 8)	1,967

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

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 Districts Governing Board

on February 10, 1999; and,

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

SIGNATURE OF DISTRICT REPRESENTATIVE

Robert Lee

DATE

2/11/99

201015 86136 91350 2948

PHONE NO. : 818-258-0033

FROM : OPSC

201015 86136 91350 2948

PHONE NO. : 818-258-0033

FROM : OPSC

EXHIBIT D

Eligibility Determination from the SAB



California Department of
General Services

CA.gov | DGS | OPSC | Project Tracking

PROJECT TRACKING

PTN GENERATOR

REPORTS

PTN HELP

Project Main Page

[Return to Search Results](#)

DSA eTracker: **03-102451**
 Application: 50/65136-00-001
 County: Los Angeles
 District: William S. Hart Union High
 Site: RIO NORTE JUNIOR HIGH
 District Rep: Mr. Michael Otavka

[Details](#)

[Fund Releases](#)

[Budget Summary](#)

[Transaction Detail](#)

[Modernization Eligibility](#)

[New Construction Eligibility](#)

District Code	Attendance Area	Original SAB Approval Date	Recent SAB Approval		
65136	0	5/26/1999	1/28/2009		
SAB 50-03 New Construction Eligibility Information					
New Constr uction Baseline Eligibility					
Grade Level:	K - 6	7 - 8	9 - 12	Non-Severe	Severe
Established Eligibility:	0	3196	7030	0	0
SAB Approvals/Adjustments:	0	450	-1884	772	298
Remaining Eligibility:	0	3646	5146	772	298
SAB 50-03 Eligibility Document S tatus/Dat es					
Status:	PM Complete				
Date Signed:	2/11/1999				
Date Received:	3/5/1999				
SAB Approval Date:	5/26/1999				

EXHIBIT E

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

WILLIAM S. HART UNION HIGH SCHOOL DISTRICT**School Facility Cost Impacts per Residential Square Foot**

March 2018

School Facility Costs

School Level	Site Acquisition Cost	Facility Construction	Total Cost
Junior High School	\$16,550,000	\$76,232,604	\$92,782,604
High School	\$47,183,417	\$159,816,584	\$207,000,000

Costs per Student

School Level	Total Cost	Students Housed	Cost per Student
Junior High School	\$92,782,604	1,200	\$77,319
High School	\$207,000,000	2,600	\$79,615

**Average School Facility Cost Impacts per Residential Unit
per Residential Square Foot at the Junior High School Level**

School Level	Cost per Student	Weighted Average SGR	Cost per Unit
Junior High School	\$77,319	0.0947	\$7,321
Total School Facility Cost Impact			\$7,321
Average Square Footage ^[1]			2,534
School Facility Cost Impact per Square Foot			\$2.89
<i>[1] See Table 16 of the Analysis.</i>			

**Average School Facility Cost Impacts per Residential Unit
per Residential Square Foot at the High School Level**

School Level	Cost per Student	Weighted Average SGR	Cost per Unit
High School	\$79,615	0.1914	\$15,241
Total School Facility Cost Impact			\$15,241
Average Square Footage ^[1]			2,573
School Facility Cost Impact per Square Foot			\$5.92
<i>[1] See Table 17 of the Analysis.</i>			

**Average School Facility Cost Impacts per
Residential Square Foot by Location**

School Level	Units Located within the CUSD Portion of the School District	Units Located withing NSD, SUSD, & SSUSD Portion of the School District
Junior High School	N/A	\$2.89
High School	\$5.92	\$5.92
Total	\$5.92	\$8.81

EXHIBIT F

Bonding Capacity Calculation

WILLIAM S. HART UNION HIGH SCHOOL DISTRICT
Bonding Capacity Calculation
Fiscal Year 2017/2018

Description		Value
(1)	Total assessed valuation of tangible taxable property (as provided by County Auditor-Controller)	\$41,936,305,405
(2)	Applicable percentage bond debt limit Section 15102 (Non-Unified School District) 1.25% Section 15108 (Unified School District) 2.50%	1.25%
(3)	District Bonding capacity	\$524,203,818
(4)	Senate Bill 50 local bonding capacity threshold 15% of District's local bonding capacity	\$78,630,573
(5)	Senate Bill 50 local bonding capacity threshold 30% of District's local bonding capacity	\$157,261,145

Source: Los Angeles County Auditor-Controller.

EXHIBIT G

Student Generation Rate Calculation

WILLIAM S. HART UNION HIGH SCHOOL DISTRICT

Student Generation Rate Calculation

Number of Existing Students in School Year 2016/2017

School Level	Student Enrollment^[1]
Junior High School	6,985
High School	15,261
Total	22,246
<i>[1] Student enrollment from October 2016.</i>	

Number of Students Matched to Units Built in the Last Five (5) Years by Land Use

Area	Students Matching to SFD Units	Students Matching to SFA Units	Students Matching to MF Units
Junior High School	205	57	14
High School	434	95	33

Number of Residential Units Built in the Last Five (5) Years by Land Use and Area

Area	SFD Units	SFA Units	MF Units
Outside CUSD	2,131	606	157
Within the Entire School District	2,236	606	157

Student Generation Rates

Area	SFD Units	SFA Units	MF Units
Junior High School	0.0962	0.0941	0.0892
High School	0.1941	0.1568	0.2102
Total	0.2903	0.2509	0.2994

EXHIBIT H

Correspondence with the City and County



COOPERATIVE STRATEGIES

COMPLETE FINANCIAL & DEMOGRAPHIC PLANNING FOR EDUCATION

March 22, 2018

Mr. David Peterson
City of Santa Clarita
Planning Division
23920 Valencia Blvd, Suite 302
Santa Clarita, CA 91355

Re: Residential Development Projections within William S. Hart Union High School District Boundaries

Dear Mr. Peterson,

Cooperative Strategies, LLC is in the process of revising the School Facilities Needs Analysis ("SFNA") for the William S. Hart Union High School District ("School District"). Pursuant to Section 65995.5(c)(3) of the Government Code, one component of the SFNA is an estimate of the number, type, and square footage of expected future residential units ("Future Units") to be constructed in the area of the City of Santa Clarita ("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 is based on information provided by the Newhall Land & Farm Company, as well as information prepared by Davis Demographics & Planning, Inc. The average square footage estimates were calculated by Cooperative Strategies based on an analysis of residential units recently built within the School District. Cooperative Strategies would like to provide the City with the opportunity to review, and if necessary, modify these projections. Please complete the attached page ("Certificate") and return to Cooperative Strategies at your earliest convenience.

Mr. Peterson, should you have any questions regarding the projections please contact me at 949.250.8343. We sincerely appreciate your assistance in providing this information and look forward to hearing from you soon.

Sincerely,

Andrew Bishop
Senior Associate Director

In its efforts to assist Cooperative Strategies, LLC in preparing the SFNA in accordance with the guidelines of Section 65995.5(c)(3) of the Government Code for the William S. Hart Union High School District, the City of Santa Clarita ("City"):

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

Unit Type	Projected Number of Units ^[1]	Estimated Average Square Footage per Unit
Single Family Detached (i.e. single family home)	786	2,900
Single Family Attached (e.g. condos, duplexes, townhomes, etc.)	563	1,750
Multifamily (i.e. apartments)	312	1,000

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

___The residential development projected by the City is listed below:

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

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

Signed, _____, of the City of Santa Clarita on _____.

Printed Name: _____
Title: _____



COOPERATIVE STRATEGIES

COMPLETE FINANCIAL & DEMOGRAPHIC PLANNING FOR EDUCATION

March 22, 2018

Mr. Donald Kress
County of Los Angeles
Department of Regional Planning
320 West Temple Street, 13th Floor
Los Angeles, CA 90012

Re: Residential Development Projections within William S. Hart Union High School District Boundaries

Dear Mr. Kress,

Cooperative Strategies, LLC is in the process of revising the School Facilities Needs Analysis ("SFNA") for the William S. Hart Union High School District ("School District"). Pursuant to Section 65995.5(c)(3) of the Government Code, one component of the SFNA is an estimate of the number, type, and square footage of expected future residential units ("Future Units") to be constructed in the area of the County of Los Angeles ("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. Because Castaic Union School District serves grades K-8, while Newhall, Saugus Union, and Sulphur Springs School Districts only serve grades K-6, development projections must be identified based on whether the area is inside or outside Castaic Union School District. The projection of the number and type of Future Units was based on information provided by the Newhall Land & Farming Company, as well as information prepared by Davis Demographics & Planning, Inc. The average square footage estimates were calculated by Cooperative Strategies based on an analysis of residential units recently built within the School District. Cooperative Strategies would like to provide the County with the opportunity to review, and if necessary, modify these projections. Please complete the attached page ("Certificate") and return to Cooperative Strategies at your earliest convenience.

Mr. Kress, should you have any questions regarding the projections please contact me at 949.250.8389. We sincerely appreciate your assistance in providing this information and look forward to hearing from you soon.

Sincerely,

Andrew Bishop
Senior Associate Director

In its efforts to assist Cooperative Strategies, LLC in preparing the SFNA in accordance with the guidelines of Section 65995.5(c)(3) of the Government Code for the William S. Hart Union High School District, the County of Los Angeles ("County"):

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

Unit Type	All Units in WSHUHSD		Units Outside Castaic USD	
	Projected Number of Units ^[1]	Estimated Average Square Footage per Unit	Projected Number of Units ^[1]	Estimated Average Square Footage per Unit
Single Family Detached (i.e. single family home)	3,360	3,200	2,608	3,200
Single Family Attached (e.g. condos, duplexes, townhomes, etc.)	2,143	1,550	1,802	1,550
Multifamily (i.e. apartments)	2,091	1,000	2,091	1,000

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

___The residential development projected by the County is listed below:

Unit Type	All Units in WSHUHSD		Units Outside Castaic USD	
	Projected Number of Units ^[1]	Estimated Average Square Footage per Unit	Projected Number of Units ^[1]	Estimated Average Square Footage per Unit
Single Family Detached (i.e. single family home)				
Single Family Attached (e.g. condos, duplexes, townhomes, etc.)				
Multifamily (i.e. apartments)				

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

Signed, _____, of the County of Los Angeles on _____.

Printed Name: _____

Title: _____

EXHIBIT I

Reconstruction

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

A. Residential Reconstruction

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

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

B. Reconstruction of Commercial/Industrial Construction into Residential Construction

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

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

EXHIBIT J

Updated School Facilities Capacity Calculation

WILLIAM S. HART UNION HIGH SCHOOL DISTRICT**School Facilities Capacity Calculation**

Application	Item	Junior High School	High School
N/A	SAB Form 50-02	2,375	7,585
N/A	Non-Severe/Severe Capacity	193	386
N/A	Teaching Stations Added Without State Funding ^[1]	0	81
N/A	Teaching Stations Added Without State Funding 2016/2017 ^[1]	0	81
N/A	Teaching Stations Added Without State Funding 2017/2018 ^[1]	108	0
50/65136-00-001	Rio Norte Junior High School	1,701	0
50/65136-00-002	Sierra Vista Junior High School	162	0
50/65136-00-003	West Ranch High School	0	2,484
50/65136-00-004	Rancho Pico Junior High School	1,700	0
50/65136-00-005	Golden Valley High School	0	2,592
50/65136-00-006	Saugus High School	0	351
50/65136-00-007	Arroyo Seco Junior High School	189	0
50/65136-00-008	Canyon High School	0	702
50/65136-00-009	Valencia High School	0	54
50/65136-00-010	Academy of the Canyons	0	270
Total Capacity	N/A	6,428	14,586

[1] Teaching stations added without State funding are loaded at 27 students per teaching station.

EXHIBIT K

Surplus Site Determination

Section 65995.6(b)(1) requires the School District to identify and consider any surplus property owned by the School District that may be used as a school site or that is available for sale to finance school facilities. The School District has identified six (6) sites that may fall into this category.

1. **Hasley Canyon/Sloan Canyon Roads**

Hasley Canyon/Sloan Canyon Roads is a 70 acre site with an assessed value of \$2,756,000. These values are based on the most recent data available from the SAB Form 423 Certification of Unused Sites.

2. **Sierra Estates**

Sierra Estates is a 10.6 acre site with an assessed value of \$790,111. These values are based on the most recent data available from the SAB Form 423 Certification of Unused Sites.

3. **Sierra Estates II**

Sierra Estates II is a 250 acre site with an assessed value of \$13,653,090. These values are based on the most recent data available from the SAB Form 423 Certification of Unused Sites.

4. **South Summit**

South Summit is a 31.5 acre site with an assessed value of \$530,673. These values are based on the most recent data available from the SAB Form 423 Certification of Unused Sites.

5. **The Ranch**

The Ranch is a 13.4 acre site with an assessed value of \$1,137,757. These values are based on the most recent data available from the SAB Form 423 Certification of Unused Sites.

6. **Vasquez Canyon**

Vasquez Canyon is an 81 acre site with an assessed value of \$4,424,612. These values are based on the most recent data available from the SAB Form 423 Certification of Unused Sites.

These six (6) sites, therefore, have a combined assessed value of \$23,292,243 that could be used to offset the impact of Future Units. This potential funding will be discussed further in Exhibit M.

DEPARTMENT OF GENERAL SERVICES
CERTIFICATION OF UNUSED SITES
 SAB 423 (7/06)

STATE ALLOCATION BOARD
 OFFICE OF PUBLIC SCHOOL CONSTRUCTION

Date of this Report: May 23, 2016

DISTRICT					DISTRICT NO. 65136		COUNTY		F/Y
William S. Hart Union High					LOS ANGELES (19)		15-16		
Site	Grade Level E-M-H	No. Acres	Year Acquired	Purchase Price	Parcel ID Number	Assessed Value	Assessed Fee	Next Assessable Year	
HASLEY CANYON/SLOAN CANYON ROADS 9835398	H	70.0	2014		3247-043-901	2,756,000	27,560	22/23	
SIERRA ESTATES (LOH) 9834284	M	10.6	2011	625,000	2813-018-903	790,111	7,901	19/20	
SIERRA ESTATES II 9834276	H	250.0	2011	10,800,000	2813-018-900 2813-018-901 2853-002-900	13,653,090	136,531	19/20	
SOUTH SUMMIT - 2.84 ACRES 9835414	H	2.8	2014		9836-013-921	392,200	3,922	22/23	
SOUTH SUMMIT - 21 ACRES 9835406	H	21.0	2014		2836-013-919	98,349	983	22/23	
SOUTH SUMMIT - 7.67 ACRES 9835422	H	7.7	2014		2836-013-920	40,124	401	22/23	
THE RANCH 9834318	H	13.4	2011	900,000	2813-018-902	1,137,757	11,378	19/20	
VASQUEZ CANYON (CATTERALL) 9834300	M	60.0	2011	2,000,000	3231-001-901 3231-001-900	2,528,349	25,283	19/20	
VASQUEZ CANYON (COULSON) 9834292	M	21.0	2011	1,500,000	3231-001-902	1,896,264	18,963	19/20	

This report lists all of the District's previously reported unused sites, including sites that have received a waiver in previous years. **All School Districts and County Offices of Education are required to report all unused sites to the State Allocation Board, pursuant to California Education Code Sections 17219 - 17224.** An unused site is deemed to be any site owned by the District that is not being used for school purposes.

Please review and verify the information indicated above for accuracy and content and answer the questions listed below. This form must be returned to the Office of Public School Construction no later than July 1, 2016.

1. Do any of the sites listed above meet the conditions for a waiver as outlined in Section IV of the Form SAB 424? **If YES, please complete a Form SAB 424 for each eligible site.**


YES ☐ NO ☒

2. Does the District have any new Unused Sites to report? **If YES, please complete a Form SAB 424 for each new site.**

YES ☐ NO ☒

I certify that I am authorized to represent the Governing Board of the District, that the above information is true and correct and that the District has no additional sites which are unused. If any of the above information is incorrect, omitted, or an unused site is not listed, I have attached Form(s) SAB 424 indicating additional sites or changes to the above information.

Michael Otawka, Director of Facilities 612-259-0033 x 274
Authorized Agent and Title (Typed or Printed) (Area Code) Phone Number


Authorized Agent (Signature)

6/30/16
Date

EXHIBIT L

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

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

1. Certificates of Participation

Certificates of Participation ("COPs") are a means of financing facilities through a lease. The lease payments are typically secured by the School District's general fund.

The School District has issued COPs in the past but does not currently have any proceeds from COPs to offset the available impacts of non-mitigated Future Units.

2. General Obligation Bonds

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

General obligation ("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 November 6, 2001, the voters of the School District approved Measure V, which authorized the issuance of \$158,000,000 in GO bonds. Currently there are no remaining Measure V Funds allocated for new construction projects.

Additionally, the voters of the School District authorized \$300 million in GO bonds on November 4, 2008 (see Exhibit F for more information on Measure SA). Of the \$300,000,000 to be issued, approximately \$110,000,000 is available for new construction projects that could be used to offset the impact of Future Units. Therefore, the School District has a total of \$110,000,000 in GO bond proceeds available at the time to offset the impacts of non-mitigated Future Units. However, in addition to the Future Units listed in Tables 2 and 3 of the Analysis, the School District will experience growth beyond the next five (5) years. According to the best residential development estimates available, the School District can expect an additional 37,423 units to be constructed within the School District through calendar year 2035. This number includes Future Units and residential units to be constructed beyond the next five (5) years.

Apportioning the \$110,000,000 in earmarked proceeds between students generated from Future Units and students generated from residential units constructed beyond the next five (5) years resulted in \$28,336,599 of the proceeds being available to reduce the impact of students generated from Future Units over the next five (5) years (see Exhibit N for more information on the allocation of GO bond proceeds). This potential funding will be discussed further below.

On June 30, 2016, the School District issued its 2016 GO Refunding Bonds. These bonds were issued to refund a portion of the 2008 Series A GO bonds. Therefore, no proceeds from this issuance are available to offset the impact of students generated from non-mitigated 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. The passage of AB X1 26 eliminated redevelopment agencies as of February 1, 2012 and replaced them with successor agencies. Though redevelopment agencies have been eliminated, local educational agency's pass-through entitlements remain.

The School District currently has a pass-through agreement with the City of Santa Clarita. Based on projected revenues from this pass-through agreement, the School District estimates it will receive \$280,314 for capital facilities over the next five (5) years. At this time, \$280,314 is considered to be available as potential funding for school facilities to house students generated from Future Units.

4. Community Facilities Districts

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

The School District has formed 10 CFDs to date: CFD No. 87-1, CFD No. 88-4, CFD No. 89-2, CFD No. 90-1, CFD No. 99-1, CFD No. 2002-1, CFD No. 2004-1, CFD No. 2005-1, CFD No. 2008-1, and CFD No. 2015-1. These CFDs were formed on specific residential development projects as a mechanism to finance mitigation payments. Accordingly, none of the special tax or bond proceeds from these CFDs will be available to offset the cost impacts of any residential units constructed outside the boundaries of the CFDs. In most instances, the School District will not be permitted to collect additional statutory school fees, mitigation payments or Alternative Fees from the units located within the CFDs, nor were the units from the CFDs considered in calculating the Alternative No. 2 and Alternative No. 3 Fees.

5. School Fees

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

A total of \$2,604,590 in commercial/industrial fees has been collected over the last five (5) years. A similar amount of commercial/industrial School Fees can be expected to be received over the following five (5) years. This potential funding will be discussed further below.

6. Identification of Existing Surplus Local Funds

As stated in Section III.B, the School District currently has 557 unhoused junior high school students and 675 unhoused high school students from existing residential units. Based on per-student costs calculated in Exhibit E, these existing unhoused students have a cost impact to the School District of \$43,066,683 at the junior high school level and \$53,740,125 at the high school level.

Over the next five (5) years, the School District will also need to construct school facilities to house students to be generated from Future Units. Using per-student costs calculated in Exhibit E, providing adequate school facilities to the 178 Projected Unhoused Students at the junior high school level and the 359 Projected Unhoused Students at the high school level identified in Section III.C will have a cost of \$13,762,782 and \$30,253,700 respectively. Table L-1 shows a summary of the school facilities needs of the School District.

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

Item	Junior High School Level	High School Level	Total
Current Unhoused Student Impact	\$43,066,683	\$53,740,125	\$96,806,808
Future Unhoused Student Impact	\$13,762,782	\$30,253,700	\$44,016,482
Total	\$56,829,465	\$83,993,825	\$140,823,290

As stated above, the School District has identified the following local funds: (i) \$28,336,599 in available GO Bond Proceeds, (ii) a potential for \$280,314 in funding from redevelopment pass-through agreements, (iii) potential commercial/industrial school fees in the amount of \$2,604,590 and (iv) potential surplus site revenues in the amount of \$23,292,243. 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 557 existing unhoused students at the junior high school level and the 675 existing unhoused students at the high school level would generate \$13,546,423 and \$16,408,223 in State funding respectively. Furthermore, and the 178 Projected Unhoused Students at the junior high school level and the 359 Projected Unhoused Students at the high school level would generate \$4,325,409 and \$9,229,990 in State funding respectively. Additionally, based on Table 14 of the Analysis, the School District can expect to receive \$4,325,409 from Alternative No. 2 Fees at the junior high school level and \$9,229,990 from Alternative No. 2 Fees at the high school level on new residential development. Table L-2 summarizes potential funding sources to fund the school facilities needs identified in Table L-1.

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

Item	Junior High School Level	High School Level	Total
Available GO Bond Proceeds	\$8,666,598	\$19,670,001	\$28,336,599
Projected Redevelopment Revenues	\$93,438	\$186,876	\$280,314
Projected Commercial/Industrial School Fees	\$868,197	\$1,736,393	\$2,604,590
Potential Value of Surplus School Sites	\$7,764,081	\$15,528,16	\$23,292,243
State Funding for Current Unhoused Students	\$13,546,423	\$16,408,22	\$29,954,646
State Funding for Projected Unhoused Students	\$4,325,409	\$9,229,990	\$13,555,399
Projected Alternative No. 2 Fees	\$4,325,409	\$9,229,990	\$13,555,399
Total	\$39,589,555	\$71,989,635	\$111,579,190

As shown in Table L-3, when considering the current and future school needs of the School District, there is currently a combined \$29,244,100 funding shortfall. Therefore, the School District does not have surplus funds available to offset the cost impact of Future Units.

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

Item	Junior High School Level	High School Level
School Facilities Needs	\$56,829,465	\$83,993,825
Local Funding Sources	(\$39,589,555)	(\$71,989,635)
Remaining Funding Shortfall	\$17,239,910	\$12,004,190

EXHIBIT M

Calculation of Additional Grants for General Site Development

WILLIAM S. HART UNION HIGH 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
Junior High School	\$12,483	6.00%	\$749
High School	\$15,838	3.75%	\$594
<i>[1] Includes Automatic Fire Detection/Sprinkler Grant.</i>			

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
Junior High School	\$18,827	22.5	\$423,608
High School	\$18,827	49.0	\$922,523

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

School Level	Grant per School Facility	Facility Capacity	Grant per Student
Junior High School	\$423,608	1,200	\$353
High School	\$922,523	2,600	\$355

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
Junior High School	\$749	\$353	\$1,102
High School	\$594	\$355	\$949

EXHIBIT N

Allocation of GO Bond Authorization

WILLIAM S. HART UNION HIGH SCHOOL DISTRICT**Allocation of GO Bond Proceeds****Credit for GO Bond Proceeds as of School Year 2018**

GO Bond Authorization	Available GO Bond Proceeds
Measure SA	\$110,000,000

Units Constructed in the Next Five (5) Years and Total Units Constructed

Unit Type	Residential Units within NSD, SUSD, and SSUSD over Next Five Years ^[1]	Residential Units within the Entire School District over the Next Five Years ^[2]	Number of Total Units ^[3]
Number of SFD Units	3,394	4,146	15,873
Number of SFA Units	2,365	2,706	13,087
Number of MF Units	2,403	2,403	6,027
Total	8,162	9,255	34,987

[1] Residential units projected over the next five years within the portion of the School District serving students in grades 7 & 8 (excludes CUSD).

[2] Residential units projected over the next five years within the portion of the School District serving students in grades 9 through 12 (includes CUSD).

[3] Total Residential Units = Residential Units in Next Five (5) Years + Residential Units Beyond Next Five (5) Years.

Students Generated by Units to be Developed in the Next Five (5) Years and by Total Units Constructed

	Students Generated from Future Units over the Next Five Years	Students Generated from Total Units
Junior High School Students from SFD Units	327	1,527
Junior High School Students from SFA Units	223	1,232
Junior High School Students from MF Units	214	538
Total Junior High School Students Generated	764	3,297
High School Students from SFD Units	805	3,081
High School Students from SFA Units	424	2,052
High School Students from MF Units	505	1,267
Total High School Students Generated	1,734	6,400
Total Students Generated	2,498	9,697
% of Students Generated from Future Units		25.76%

Allocation of GO Bond Authorization to Students Generated from Future Units

Item	Amount
Available GO Bond Proceeds	\$110,000,000
% of Students Generated from Future Units	25.76%
GO Bond Proceeds Available to Students Generated from Future Units	\$28,336,599
GO Bond Proceeds Available to Junior High School Students Generated from Future Units	\$8,666,598
GO Bond Proceeds Available to High School Students Generated from Future Units	\$19,670,001