

MEETING MINUTES

The Santa Rosa City Schools Board Meeting of April 24, 2024, starting at 6:00 pm, is in a hybrid format. The public can attend and **comment in person** by presenting a blue card to the Executive Assistant at the Santa Rosa City Hall Council Chambers (100 Santa Rosa Ave, Santa Rosa, CA 95404) or view/listen to the meeting in a virtual format via Zoom. **No public comments will be taken via the virtual format.** For more information on viewing/listening to the meeting virtually via Zoom or by phone, please click [HERE](#).

La reunión de la mesa directiva del distrito escolar Santa Rosa City Schools del 24 de abril de 2024, a partir de las 6:00 p. m., se llevará a cabo en un formato híbrido. El público puede asistir y **hacer comentarios en persona** presentando una tarjeta azul a la Asistente Ejecutiva en la Cámara del Ayuntamiento de Santa Rosa (100 Santa Rosa Ave, Santa Rosa, CA 95404) o ver/escuchar la reunión en formato virtual a través de Zoom. **No se aceptarán comentarios públicos a través del formato virtual.** Para obtener más información sobre cómo ver/escuchar la reunión virtualmente a través de Zoom o por teléfono, haga clic [AQUÍ](#).

Individual speakers shall be allowed up to three minutes to address the Board on each agenda or non-agenda item. The Board may limit the total time for public input on each item to 20 minutes. With Board consent, the presiding officer may increase or decrease the time allowed for public presentation, depending on the topic and the number of persons wishing to be heard. The presiding officer may take a poll of speakers for or against a particular issue and may ask that additional persons speak only if they have something new to add (BP 9323).

Se les permitirán a los oradores hablar de manera individual por tres minutos ante la mesa directiva sobre cada tema incluido o no en la agenda. La mesa directiva puede limitar el tiempo total para la participación del público a 20 minutos por cada tema. Con el consentimiento de la mesa directiva, la presidenta puede incrementar o disminuir el tiempo asignado para los comentarios del público, dependiendo del tema y la cantidad de personas que deseen ser escuchadas. La presidenta puede llevar a cabo una encuesta para determinar cuántos oradores están a favor o en contra de un tema en particular, y puede pedir que otras personas hablen solo si tienen algo nuevo que agregar (BP 9323).

For questions or comments, please contact the Superintendent's Office at (707) 890-3800 ext. 80101 or mmartin@srcs.k12.ca.us.

To view future board meeting dates, click [HERE](#).

To view agendas and minutes from July 2016 - August 12, 2020, click [HERE](#).

To view agendas and minutes prior to July 27, 2016, please contact the Superintendent's Office at (707) 890-3800 ext. 80101, mmartin@srcs.k12.ca.us.

To view recordings of past board meetings, click [HERE](#).

MISSION: SRCS ensures equitable access to a transformative educational experience grounded in the assets of our students, staff, and community. We nurture the whole student in an engaging, challenging, and safe environment. We recognize and value each student's individuality and our community's cultural wealth.

VISION: SRCS will send students into the world empowered to find purpose, think critically, embrace diversity, work together, and adapt to our changing planet, and live healthy and fulfilling lives.

Attendees

Voting Members

Ever Flores, Board of Education Vice President

Stephanie Manieri, Board of Education Director

Omar Medina, Board of Education President

Roxanne McNally, Board of Education Clerk

Jeremy De La Torre, Board of Education Director

A. CALL TO ORDER (4:00 p.m.)

President Medina called the meeting to order at 4:05 p.m.

1. Public Comment on Closed Session Agenda

There was no public comment on the Closed Session agenda.

B. RECESS TO CLOSED SESSION

President Medina stated the following items will be discussed during the Closed Session:

- Public Employee Appointment/Employment (Position to be filled: Superintendent)
- Public Employee Performance Evaluation (Title of employee being reviewed: Superintendent, Associate Superintendent, Assistant Superintendent, Principals, Vice Principals, Assistant Principals, Directors, Coordinators)
- Public Employee Discipline/Dismissal/Release
- Conference With Labor Negotiator (Name of designated rep attending: Dr. Vicki Zands; name of organization: SRTA/CSEA)
- Conference With Legal Counsel - Existing Litigation (Case name: SPSV - Parker/Phillips; 24CV-00520; 23CV-00397)
- Student Expulsions (Case Nos: 2023/24-14, 2023/24-20)

The meeting recessed to Closed Session at 4:06 pm.

- 1. Public Employee Appointment/Employment (Position to be filled: Superintendent) [Gov. Code § 54957]**
- 2. Public Employee Performance Evaluation (Title of employee being reviewed: Superintendent, Associate Superintendent, Assistant Superintendent, Principals, Vice Principals, Assistant Principals, Directors, Coordinators) [Gov. Code § 54957]**
- 3. Public Employee Discipline/Dismissal/Release [Gov. Code § 54957]**
- 4. Conference With Labor Negotiator (Name of designated rep attending: Dr. Vicki Zands; name of organization: SRTA/CSEA) [Gov. Code § 54957.6]**
- 5. Conference With Legal Counsel - Existing Litigation (Case name: SPSV - Parker/Phillips; 24CV-00520; 23CV-00397) [Gov. Code § 54956.9]**
- 6. Student Expulsions (Case Nos: 2023/24-14, 2023/24-20) [Ed. Code § 48918]**

C. RECONVENE TO OPEN SESSION (6:00 p.m.)

President Medina reconvened the meeting to the Open Session at 6:05 pm.

Trustee Sheffield and Trustee De La Cruz were absent.
Student Board Member Audrey Rauh was present.

1. Pledge of Allegiance

President Medina led the Pledge of Allegiance.

2. Territorial Land Acknowledgment

Erandi Hernandez Aguilar and Laura Escutia led the Territorial Land Acknowledgment.

3. Report of Actions Taken in Closed Session

There was no report of action during the Closed Session.

4. Items Considered In Closed Session for Action In Open Session

The following items were considered in the Closed Session for action in the Open Session:

- Student Expulsion Case No.: 2023/24-14
- Student Expulsion Case No.: 2023/24-20

Motion Passed: Student Expulsion Case No.: 2023/24-14

Motion made by: Ever Flores

Motion seconded by: Jeremy De La Torre

Voting:

Ever Flores - Yes

Jeremy De La Torre - Yes
Omar Medina - Yes
Stephanie Manieri - Yes
Roxanne McNally - Yes

Motion Passed: Student Expulsion Case No.: 2023/24-20

Motion made by: Ever Flores

Motion seconded by: Roxanne McNally

Voting:

Ever Flores - Yes
Roxanne McNally - Yes
Jeremy De La Torre - Yes
Omar Medina - Yes
Stephanie Manieri - Yes

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5. Statements of Abstention

There were no statements of abstention.

6. Adjustments to Agenda

The following adjustments to the agenda were made:

Superintendent Trunnell asked to move items F.6 (Public Hearing to Establish/Increase SRCS Developer Fees Rates) and F.7 (Approval of Resolution No. 2023/24-35 Elementary District and Resolution No. 2023/24-36 High School District to Establish/Increase SRCS Developer Fee Rates to right after item F. 1 Resolution for May as Asian American and Pacific Islander Heritage Month.

President Medina pulled item G.11 (Approval of Hyatt Regency Contract for Piner High School Prom) for discussion.

The Board was in favor; there was no objection.

7. Special Presentations for Student of the Month and Certificated/Classified Employees of the Month (Santa Rosa Middle School and Hilliard Comstock Middle School)

The following individuals were recognized during the Special Presentation:

Santa Rosa Middle School

- Evelyn Ortiz Dominguez, Student of the Month

- Roya Moslem, Classified Employee of the Month
- Katie-Lauren Dunbar, Certificated Employee of the Month

Hilliard Comstock Middle School

- Karen Flores, Student of the Month
- Cristina Arteaga Gutierrez, Classified Employee of the Month
- Kwici Khamthee, Certificated Employee of the Month

8. School Site Parent Organization Updates (Santa Rosa Middle School and Hilliard Comstock Middle School)

The following individuals gave a School Site Parent Organization update:

Santa Rosa Middle School

- Maria Martinez, ELAC Representative
- Will Lyon, PFSO President

Hilliard Comstock Middle School

- Mireya De La Cruz, ELAC and PFSO Representative

D. REPORTS

1. California School Employee Association (CSEA) Santa Rosa 75 Report

There was no California School Employee Association (CSEA) Santa Rosa 75 report.

2. Santa Rosa Teachers Association (SRTA) Report

President Howell gave a Santa Rosa Teachers Association (SRTA) report.

3. Superintendent Report

Superintendent Trunnell Report:

- Today marks Day 151 for elementary schools and 150 for secondary schools. Only 29 more days of opportunity to positively support our students this school year!
- My heart is so full. Reflecting on the incredible journey of the past four years, I am filled with immense gratitude for this remarkable community, a community where I have chosen to live and be a resident. Through some tremendously challenging times, I have worked hard to serve in a calm, even, open, and caring way, always leading with dignity and respect, even when this was not reciprocated.
- I want to express my gratitude to the Santa Rosa City Schools Board of Education for entrusting me with the role of Superintendent. It has been an honor to serve alongside such a dedicated governance team,

and I extend my deepest respect to each board member for their unwavering dedication to serving our community.

- Our district employees are among the best, and I could not be more thankful for all of them. They consistently go above and beyond to ensure that our students receive the care and support they deserve. I feel so fortunate to have a strong team who works day and night to meet the needs of students, staff, and families.
- Our parents are our strongest allies in supporting our youth. I am very appreciative for the many opportunities that I have had over the years to engage with and get to know so many.
- I want to also acknowledge our community partners and community based organizations who help to uplift and support our youth and families every day. They provide much needed support in addition to the services we provide, and their hard work and dedication is a prime example of what it means to take a village.
- Most importantly, I continue to be inspired by our students, who deserve our best efforts in helping them to achieve their dreams. They certainly are our future, but we must continue to help them feel and be successful today. Our students are why we are here, and they deserve to have our full attention.

4. Board President Report

President Medina gave a report.

5. Board Member Reports

The following Board Members gave a report:

- Trustee De La Torre
- Trustee McNally
- Trustee Flores
- Trustee Manieri

6. Safety Report

There was no safety report.

7. CSBA Report

There was no CSBA report.

E. PUBLIC COMMENT ON NON AGENDA ITEMS

The following individuals addressed the Board during public comment on non-agenda items:

- Xandri Bautista - School Resource Officers
- Evandi Hernandez Aguilar - School Resource Officers
- Alexandra Mendoza Ayala - School Resource Officers
- Bri Perkins - School Resource Officers
- Adina Flores - Non-profits
- Kelsey Vero - Sexual Assault Awareness / School Resource Officers
- Attila Nagy - School Resource Officers

- Susan Lamont - School Resource Officers
- Bailee Russell - Willis - Police Free Schools
- Dallas Womack - Police on School Campus
- In Hui Lee - Police Free School
- Jason Sweeny - School Resource Officers
- Alyn Wolves - School Resource Officers
- Ursula Senghas - Poles - School Resource Officers
- Ceci Sifranco - Coalition for Safety & Belonging
- Ruby Nunn Curtis - Police Free School
- Dianne Monroe - Police in Schools
- Maria Pozzi - Non profits
- Diana Kingsbury - School Resource Officers
- Noa Lewin - Staff trauma training
- Deanna Oliverez - Parent involvement
- Jimmy Wu - School Resource Officers
- Jason Farnham - School Safety

F. DISCUSSION / ACTION ITEMS

1. (Action) Resolution for May as Asian American and Pacific Islander Heritage Month

The following individuals presented the Resolution for May as Asian American and Pacific Islander Heritage Month to the Board:

- Dr. Roderick Castro, Assistant Superintendent of Educational Services
- Stephanie Hue, Teacher
- Samantha Kim, Teacher
- Grace Cheung, AAPI Representative

The presentation lasted 13 minutes.

The Board's questions and comments lasted 2 minutes.

Motion Passed: Resolution for May as Asian American and Pacific Islander Heritage Month

Student Board Member Rauh preferential vote: Aye

Motion made by: Jeremy De La Torre

Motion seconded by: Stephanie Manieri

Voting:

Ever Flores - Yes

Stephanie Manieri - Yes

Omar Medina - Yes

Roxanne McNally - Yes

Jeremy De La Torre - Yes

2. (Action) Resolution for Teacher Appreciation Week May 6-10, 2024

The following individuals presented the Resolution for Teacher Appreciation Week May 6-10, 2024:

- Dr. Vicki Zands, Assistant Superintendent of Human Resources
- Sydney Smith, Director of Human Resources
- Jesse Olson, Director of Human Resources

The presentation lasted 2 minutes.

Motion Passed: Resolution for Teacher Appreciation Week May 6-10, 2024

Student Board Member Rauh preferential vote: Aye

Motion made by: Jeremy De La Torre

Motion seconded by: Stephanie Manieri

Voting:

Ever Flores - Yes

Stephanie Manieri - Yes

Omar Medina - Yes

Roxanne McNally - Yes

Jeremy De La Torre - Yes

3. (Action) Resolution for Classified School Employee Week May 19-25, 2024

The following individuals presented the Resolution for Classified School Employee Week May 19-25, 2024 to the Board:

- Dr. Vicki Zands, Assistant Superintendent of Human Resources
- Sydney Smith, Director of Human Resources
- Jesse Olson, Director of Human Resources

The presentation lasted 1 minute.

The Board comments lasted 2 minutes.

Motion Passed: Resolution for Classified School Employee Week May 19-25, 2024

Student Board Member Rauy preferential vote: Aye

Motion made by: Stephanie Manieri

Motion seconded by: Ever Flores

Voting:

Ever Flores - Yes

Stephanie Manieri - Yes

Omar Medina - Yes

Roxanne McNally - Yes

Jeremy De La Torre - Yes

4. (Action) Resolution Recognizing Guest Teacher Appreciation in May 2024

The following individuals presented the Resolution Recognizing Guest Teacher Appreciation in May 2024 to the Board:

- Dr. Vicki Zands, Assistant Superintendent of Human Resources
- Sydney Smith, Director of Human Resources
- Jesse Olson, Director of Human Resources

The presentation lasted 1 minute.

The Board's comments lasted 2 minutes.

Motion Passed: Resolution Recognizing Guest Teacher Appreciation in May 2024

Student Board Member Rauh preferential vote: Aye

Motion made by: Roxanne McNally

Motion seconded by: Ever Flores

Voting:

Ever Flores - Yes

Stephanie Manieri - Yes

Omar Medina - Yes

Roxanne McNally - Yes

Jeremy De La Torre - Yes

5. (Discussion) Panorama Survey/YouthTruth Survey/Attendance/Discipline

The following individuals presented the Panorama Survey/YouthTruth Survey/Attendance/Discipline report to the Board:

- Stacy Desideri, Executive Director of Wellness and Engagement
- Dr. Emanuele Bardelli, Executive Director of Information and Evaluation
- Eric Lofchie, Director of Mental Health & Community Schools Development

The presentation lasted 21 minutes.

At 9:40 pm, President Medina requested a motion to extend the meeting. Trustee Flores made a motion to extend the meeting to 10:30 pm, Trustee Manieri seconded it; all were in favor.

The following individual addressed the Board during public comment:

- Deanna Olivarez

The Board's questions and comments lasted 32 minutes.

The updated presentation is attached to the meeting minutes supporting documents.

6. Public Hearing to Establish/Increase SRCS Developer Fee Rates

President Medina opened the Public Hearing to Establish/Increase SRCS Developer Fee Rates at 8:07 pm.

There was no public comment during the Public Hearing.

President Medina closed the Public Hearing at 8:07 pm.

7. (Action) Approval of Resolution No. 2023/24-35 Elementary District and No. 2023/24-36 High District to Establish/Increase SRCS Developer Fee Rates

The following individuals presented the Approval of Resolution No. 2023/24-35 Elementary District and No. 2023/24-36 High District to Establish/Increase SRCS Developer Fee Rates to the Board:

- Lisa August, Associate Superintendent of Business Services
- Joel Dontos, Executive Director of Fiscal Services

The presentation lasted 3 minutes.

The Board's questions and comments lasted 23 minutes.

Motion Passed: Approval of Resolution No. 2023/24-35 Elementary District and No. 2023/24-36 High District to Establish/Increase SRCS Developer Fee Rates

Student Board Member Rauh preferential vote: Aye

Motion made by: Jeremy De La Torre

Motion seconded by: Ever Flores

Voting:

Ever Flores - Yes

Stephanie Manieri - Yes

Omar Medina - Yes

Roxanne McNally - Yes

Jeremy De La Torre - Yes

G. CONSENT ITEMS

Motion Passed: Consent Items G.1 - G.10, G.12

Student Board Member Rauh preferential vote: Aye

Motion made by: Jeremy De La Torre

Motion seconded by: Ever Flores

Voting:

Ever Flores - Yes

Stephanie Manieri - Yes

Omar Medina - Yes

Roxanne McNally - Yes

Jeremy De La Torre - Yes

1. Approval of Absent Board Members

2. Approval of Personnel Transactions

3. **Approval of Vendor Warrants**
4. **Approval of Donations and Gifts**
5. **Approval of Contracts**
6. **Approval of Contracts - Bond**
7. **Approval of the Santa Rosa Golf and Country Contract for Elsie Allen Prom**
8. **Approval of the Blue Ridge Kitchen Contract for Montgomery High School Prom**
9. **Approval of the Events To The 'T' Inc. Contract for Maria Carrillo High School Prom**
10. **Approval of The Backdrop Contract for Santa Rosa High School Prom**
11. **Approval of Hyatt Regency Contract for Piner High School Prom**

President Medina requested to pull item G.11, Approval of Hyatt Regency Contract for Piner High School Prom. Associate Superintendent Lisa August provided clarification to President Medina's question regarding the cost of the contract.

Motion Passed: Approval of Hyatt Regency Contract for Piner High School Prom

Student Board Member Rauh preferential vote: Aye

Motion made by: Stephanie Manieri

Motion seconded by: Ever Flores

Voting:

Ever Flores - Yes

Stephanie Manieri - Yes

Omar Medina - Yes

Roxanne McNally - Yes

Jeremy De La Torre - Yes

12. **Approval of Resolution No. 2023/24-59, Lease-Leaseback Agreements for District Office & Education Center Central Receiving Warehouse**

H. APPROVAL OF MINUTES

1. **Approval of Minutes of the Regular Board Meeting Held On April 10, 2024**

Motion Passed: Approval of Minutes of the Regular Board Meeting Held On April 10, 2024

Student Board Member Rauh preferential vote: Aye

Motion made by: Jeremy De La Torre

Motion seconded by: Ever Flores

Voting:

Ever Flores - Yes

Stephanie Manieri - Yes
Omar Medina - Yes
Roxanne McNally - Yes
Jeremy De La Torre - Yes

2. Approval of Minutes of the Special Board Meeting Held On April 17, 2024

Motion Passed: Approval of Minutes of the Special Board Meeting Held On April 17, 2024

Student Board Member Rauh preferential vote: Aye

Motion made by: Stephanie Manieri

Motion seconded by: Jeremy De La Torre

Voting:

Ever Flores - Yes
Stephanie Manieri - Yes
Omar Medina - Yes
Roxanne McNally - Yes
Jeremy De La Torre - Yes

I. BOARD MEMBER REQUESTS FOR INFORMATION

J. INFORMATION ITEMS

- 1. Future Board Discussion Items**
- 2. Board Conduct and Code of Ethics**
- 3. Educational Acronyms and Abbreviations**
- 4. Facilities Projects Update**
- 5. School Site Reports**
 - a. Santa Rosa Middle School**
 - b. Hilliard Comstock Middle School**
- 6. Sonoma County Office of Education (SCOE) Approval Letter: 2023-24 Second Intermin**
- 7. Waiver Presentation Addendum**

K. ADJOURNMENT

The meeting adjourned at 9:52 pm.

Clerk of Board

Date

Resolution for May as Asian American and Pacific Islander Heritage Month

WHEREAS, May marks the celebration of Asian American and Pacific Islanders in the US, and we take this time to honor our rich history, cultural diversity, achievements, and contributions; and

WHEREAS, Asian Americans and Pacific Islanders play a significant role in the creation of a dynamic and pluralistic American society with 32 Asian ethnic groups and 77 Asian languages in California who contribute to the development and richness of this country; and

WHEREAS, Asian American and Pacific Islanders are one of the fastest growing racial/ethnic minority groups in the US, with California being home to the largest Asian American population and second largest Native Hawaiian and Pacific Islander population; and

WHEREAS, in Santa Rosa, the AAPI community makes up 5.2% of Santa Rosa's population today and 5.3% of SRCS students; and

WHEREAS, AAPI activists persevered throughout the historically challenging times, including Lee Yick, who won a Supreme Court case that ensured that all people, citizens and noncitizens, had equal protection under the law in 1898; Mabel Ping-Hua Lee, who campaigned for women's suffrage in 1912; Larry Itliong and Phillip Vera Cruz who led the lengthy Filipino labor movement; Fred Korematsu, who refused to comply with Executive Order 9066 during WWII; Kiyoshi Kuromiya lifelong activist who was born in the Heart Mountain Wyoming internment camp in 1943; civil right figures Yuri Kochiyama and Grace Lee Boggs; instrumental AAPI architects, authors tech founders, politicians, athletes, and scientists as well as today's front line essential workers; and the historic milestone of the inauguration of the first U.S. South Asian-African American woman, Vice-President Harris; and

WHEREAS, the continued resiliency and determination of AAPIs prevails today in the face of systemic barriers to economic justice, health equity, and surging rates of anti-Asian harassment, scapegoating, exclusion, and violence that reflect centuries of anti-Asian xenophobia; and

WHEREAS, education is key to teaching how AAPIs experience life and race in America and to honor the diversity of the cultures, history, and richness that enhance the fabric of this country, including the young activists across the Pacific today who are using traditional ecological practices to combat threats to the ocean resources their communities have protected and thrived on for thousands of years; and

WHEREAS, we are accountable for creating inclusive and adept educational environments so AAPI students are safe from bias-based assumptions that deny their diverse and unique expression of self;

NOW, THEREFORE, BE IT RESOLVED that the Santa Rosa City Schools District Board of Trustees proclaims the month of May 2024 as Asian American and Pacific Islander Heritage Month and encourages all District schools to observe this occasion with appropriate instructional activities.

PASSED AND ADOPTED by the Board of Education of Santa Rosa City Schools on this 24th day of April 2024 by the following vote:

AYES: 5 NOES: 0 ABSENT: 2 ABSTAIN: 0



Roxanne McNally, Clerk of the Board

April 24, 2024

Date



Level I Developer Fee Study
for
Santa Rosa Elementary School District

January 30, 2024

Anna Trunnell, Superintendent

Board of Directors

Omar Medina, President
Ever Flores, Vice President
Roxanne McNally, Clerk
Alegria De La Cruz, Director
Stephanie Manieri, Director
Ed Sheffield, Director
Jeremy De La Torre, Director

Prepared by:

Jack Schreder & Associates, Inc.



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EXECUTIVE SUMMARY

- Education Code Section 17620 authorizes school districts to levy a fee, charge, dedication or other form of requirement against any development project for the construction or modernization of school facilities, provided the District can show justification for levying of fees.
- In January of 2024, the State Allocation Board's biennial inflation adjustment changed the fee to \$5.17 per square foot for residential construction and \$0.84 per square foot for commercial/industrial construction.
- The Santa Rosa Elementary School District currently shares developer fees with the Santa Rosa High School District. The developer fee sharing arrangement between the school districts is currently 30 percent for the high school district and 70 percent for the Santa Rosa Elementary School District.
- The Santa Rosa Elementary School District's portion of the current Level I residential statutory fee is \$3.62 (70% of \$5.17) per square foot of construction. However, the Level I fee calculations justify a residential fee of \$2.74. Therefore, the District is justified to collect \$2.74 per square foot of residential construction.
- The Santa Rosa Elementary School District's portion of the current Level I commercial/industrial statutory fee is \$0.59 (70% of \$0.84) per square foot of construction. The Level I fee calculations justify a commercial/industrial fee ranging from \$0.02 and \$2.05 per square foot of construction, dependent on the category of construction. Therefore, the District is justified to collect from \$0.02 to \$0.59 (70% of \$0.84) per square foot of residential construction, depending on the category of construction.
- In general, it is fiscally more prudent to extend the useful life of an existing facility than to construct new facilities when possible. The cost to modernize facilities is approximately 41.1 percent of the cost to construct new facilities.
- The residential justification is based on the Santa Rosa Elementary School District's projected modernization need of \$18,813,356 for students generated

from residential development over the next 25 years and the projected residential square footage of 6,876,600.

- Based on the modernization need for students generated from projected residential development and the projected residential square footage, each square foot of residential construction will create a school facilities cost of \$2.74 ($\$18,813,356 / 6,876,600$).
- Each square foot of commercial/industrial construction will create a school facilities cost ranging from \$0.02 to \$2.05 per square foot of new commercial/industrial construction.
- For both residential and commercial/industrial development, the fees authorized by Government Code section 65995 are justified.

INTRODUCTION

In September 1986, the Governor signed into law Assembly Bill 2926 (Chapter 887/Statutes 1986) which granted school district governing boards the authority to impose developer fees. This authority is codified in Education Code Section 17620 which states in part "...the governing board of any school district is authorized to levy a fee, charge, dedication or other form of requirement against any development project for the construction or modernization of school facilities."

The Level I fee that can be levied is adjusted every two years according to the inflation rate, as listed by the state-wide index for Class B construction set by the State Allocation Board. In January 1992, the State Allocation Board increased the Level I fee to \$1.65 per square foot for residential construction and \$0.27 per square foot for commercial/industrial construction.

Senate Bill 1287 (Chapter 1354/Statutes of 1992) effective January 1, 1993, affected the facility mitigation requirements a school district could impose on developers. Senate Bill 1287 allowed school districts to levy an additional \$1.00 per square foot of residential construction (Government Code Section 65995.3). The authority to levy the additional \$1.00 was rescinded by the failure of Proposition 170 on the November 1993 ballot.

In January 1994, the State Allocation Board's biennial inflation adjustment changed the fee to \$1.72 per square foot for residential construction and \$0.28 per square foot for commercial/industrial construction.

In January 1996, the State Allocation Board's biennial inflation adjustment changed the fee to \$1.84 per square foot for residential construction and \$0.30 per square foot for commercial/industrial construction.

In January 1998, the State Allocation Board's biennial inflation adjustment changed the fee to \$1.93 per square foot for residential construction and \$0.31 per square foot for commercial/industrial construction.

In January 2000, the State Allocation Board's biennial inflation adjustment changed the fee to \$2.05 per square foot for residential construction and \$0.33 per square foot for commercial/industrial construction.

In January 2002, the State Allocation Board's biennial inflation adjustment changed the fee to \$2.14 per square foot for residential construction and \$0.36 per square foot for commercial/industrial construction.

In January 2004, the State Allocation Board's biennial inflation adjustment changed the fee to \$2.24 per square foot for residential construction and \$0.41 per square foot for commercial/industrial construction.

In January 2006, the State Allocation Board's biennial inflation adjustment changed the fee to \$2.63 per square foot for residential construction and \$0.42 per square foot for commercial/industrial construction.

In January 2008, the State Allocation Board's biennial inflation adjustment changed the fee to \$2.97 per square foot for residential construction and \$0.47 per square foot for commercial/industrial construction.

In January 2010, the State Allocation Board's biennial inflation adjustment maintained the fee at \$2.97 per square foot for residential construction and \$0.47 per square foot for commercial/industrial construction.

In January 2012, the State Allocation Board's biennial inflation adjustment changed the fee to \$3.20 per square foot for residential construction and \$0.51 per square foot for commercial/industrial construction.

In January 2014, the State Allocation Board's biennial inflation adjustment changed the fee to \$3.36 per square foot for residential construction and \$0.54 per square foot for commercial/industrial construction.

In February 2016, the State Allocation Board's biennial inflation adjustment changed the fee to \$3.48 per square foot for residential construction and \$0.56 per square foot for commercial/industrial construction.

In January 2018, the State Allocation Board's biennial inflation adjustment changed the fee to \$3.79 per square foot for residential construction and \$0.61 per square foot for commercial/industrial construction.

In January 2020, the State Allocation Board's biennial inflation adjustment changed the fee to \$4.08 per square foot for residential construction and \$0.66 per square foot for commercial/industrial construction.

In February 2022, the State Allocation Board's biennial inflation adjustment changed the fee to \$4.79 per square foot for residential construction and \$0.78 per square foot for commercial/industrial construction.

In January 2024, the State Allocation Board's biennial inflation adjustment changed the fee to \$5.17 per square foot for residential construction and \$0.84 per square foot for commercial/industrial construction.

The next adjustment to the fee will occur at the January 2026 State Allocation Board meeting.

In order to levy a fee, a district must make a finding that the fee to be paid bears a reasonable relationship and be limited to the needs of the community for elementary or high school facilities and be reasonably related to the need for schools caused by the development. Fees are different from taxes and do not require a vote of the electorate. Fees may be used only for specific purposes and there must be a reasonable relationship between the levying of fees and the impact created by development.

In accordance with the recent decision in the Cresta Bella LP v. Poway Unified School District, 218 Cal. App.4th 438(2013) court case, school districts are now required to demonstrate that reconstruction projects will generate an increase in the student population thereby creating an impact on the school district's facilities. School districts must establish a reasonable relationship between an increase in student facilities needs and the reconstruction project in order to levy developer fees.

Purpose of Study

This study will demonstrate the relationship between residential and commercial/industrial growth and the need for the modernization of school facilities in the Santa Rosa Elementary School District.

SECTION I: DEVELOPER FEE JUSTIFICATION

Developer fee law requires that before fees can be levied a district must find that justification exists for the fee. Government Code Section 66001 (g) states that a fee shall not include the costs attributable to existing deficiencies in public facilities but may include the costs attributable to the increased demand for public facilities reasonably related to the development project in order to refurbish existing facilities to maintain the existing level of service or achieve an adopted level of service that is consistent with a general plan. This section of the study will show that justification does exist for levying developer fees in the Santa Rosa Elementary School District.

Facilities Capacity

The District's capacity is adequate to house the District's current student population. Facility needs exist regardless of the availability of capacity to house student enrollments, inclusive of student enrollment generated from new development. New students generated from future development will create a burden on existing school facilities. Capital improvements, including upgrades or the replacement of existing facilities with new facilities for their continued long-term use, are necessary to adequately house future enrollment growth at all school levels.

The District's current total student capacity will diminish over time if the District does not modernize its facilities. Without modernization of aging buildings, some facilities will become unavailable, which will decrease the District's total student capacity. New development in the District necessitates that modernization occur in order to continue to have available school housing for newly generated students. As part of these modernization efforts, the District plans to modernize existing schools and to replace some of its existing schools with new buildings on the same site as the existing schools become old, inadequate, and pose health and safety challenges.

Modernization and Reconstruction

Extending the useful life of a school is a cost effective and prudent way to house students generated from future development. The state of California recognizes the need to extend the life of existing schools and provides modernization funding through the State School Facility Program. For the purpose of this report, modernization and reconstruction are used interchangeably since many of the improvements are common to both programs. Developer fees may not be used for regular maintenance, routine repair of school buildings and facilities, or deferred maintenance. Projects included in the 2022 \$125 million bond exceed available bond funds. Developer fees will be used to assist with projects including, but not limited to repairing and replacing portables, repairing leaky roofs, and updating plumbing, electrical, and cooling systems. Facility upgrades are necessary to provide adequate housing to students generated from new development. The District's 2016, 2022, and 2023 Facility Master Plans provide examples of the types of projects that can be funded by the developer fees and a summary of facility needs and costs. In addition to modernization and reconstruction needs, the District may have the need in the future to increase capacity as residential units are constructed. Projects will be funded as developer fee revenue is generated. The authorization to justify modernization and reconstruction of school facilities and extend the useful life of existing schools is contained in Education Code Section 17620 and Government Code Section 66001 (g). School districts are permitted to modernize or replace existing or build new school facilities with developer fees as justified by this Study.

Modernization Need

As new students are generated by new development, the need to increase the useful life of school facilities will be necessary. In order to calculate the District's estimated modernization need generated by students from new development, it is necessary to determine the following factors: the number of units included in proposed developments, the District student yield factor, and the per pupil cost to modernize facilities.

Projected Development

The Santa Rosa Elementary School District is located within the City of Santa Rosa and County of Sonoma planning jurisdictions. Based on information extracted from the

Sonoma County Travel Model (February 7, 2022), there is the potential for 6,489 residential units to be constructed in the next 25 years. Based on historical development information provided by the City of Santa Rosa, of the 6,489 units, an estimated 1,075 are projected to be single family detached, 345 single family attached, 3,966 multi family, and 1,103 affordable units. Appendix D includes a development summary provided by the County of Sonoma and the breakdown of unit types based on information provided by the City of Santa Rosa. A total of 6,489 residential units were included to calculate Level I fees.

The School Facility Program allows districts to apply for modernization funding for classrooms over 25 (permanent) or 20 (portable) years, meaning that school facilities are presumed to be eligible for, and therefore need, modernization after that time period. It is therefore generally presumed that school facilities have a useful life span of 25 years before modernization is needed in order to maintain the same level of service as previously existed. The same would be true for modernization of buildings 25 years after their initial modernization. In some cases, these older buildings may need to be closed entirely for the health and safety of students, teachers, staff and other occupants. Aging infrastructure and building problems can profoundly impact a school's ability to safely remain in service and to continue delivering the instructional program to students at existing levels of service. Therefore, the District's modernization needs are considered over a 25 year period, and a 25 year projection has been included in the Study when considering the homes that will generate students for the facilities in question. Future development will generate additional students for the District to house. Developer fees generated from future development may be used to modernize or construct facilities to house students from planned future development.

School facilities have a limited usable lifespan, and school districts must consider the lifespan for each facility when planning and determining student housing needs in the future. Residential units will be built at different times over the coming years, and it is difficult to predict when construction on these projects will be complete. Additionally, the homes in these developments may be immediately occupied with families with school-aged children, or they may not be occupied by school-aged children for another five, ten, or fifteen years as young people who move in begin starting to have families. Thus, the District must be prepared to house students from new developments for the next several decades.

Student Generation Rate

In determining the impact of new development, the District is required to show how many students will be generated from the new development. In order to ensure that new development is paying only for the impact of those students that are being generated by new homes and businesses, the student generation rate is applied to the number of new housing units to determine development-related impacts. The student generation rate identifies the number of students per housing unit and provides a link between new residential construction projects and projected enrollment.

To identify the number of students anticipated to be generated by new residential development, a student yield factor of .047 for single family detached units, .054 for single family attached units, .026 for multi family units and .323 for affordable units have been utilized for the Santa Rosa Elementary School District. The yield factors are based on Student Generation rates calculated for the District's May 2023 *Demographic Analysis and Enrollment Projections Study*.

Construction Cost

The construction cost per TK-6 pupil is \$86,531. Construction costs are based on square footage information provided by California Department of Education and construction costs provided by Quattrocchi Kwok Architects (QKA). Appendix A includes the cost per student calculations. Table 1 shows the estimated cost to construct facilities per TK-6 pupil.

Grade Level	Construction Costs
TK-6	\$86,531

Source: California Department of Education, Quattrocchi Kwok Architects.

Modernization Cost

The cost to modernize facilities is 41.1 percent of new construction costs. The percentage is based on the comparison of the State per pupil modernization grant (including 3% for Americans with Disabilities and Fire, Life Safety improvements) and the State per pupil new construction grant. For example, the State provides \$15,770 per TK-6 pupil to construct new facilities and \$6,005 to modernize facilities, which is 38.1 percent ($\$6,005 / \$15,770$) of the new construction grant amount. In addition, the State provides a minimum of three percent for ADA/FLS improvements which are required by the Department of State Architect's (DSA) office. Based on the per pupil grant amounts and the ADA/FLS costs, the estimated cost to modernize facilities is 41.1 percent of the cost to construct facilities. The School Facility Program per pupil grant amounts are included in Appendix B.

The construction cost per TK-6 pupil is \$86,531 and is outlined in Table 1. Therefore, the per pupil cost to modernize facilities per TK-6 pupil is \$35,564 ($\$86,531 \times .411$).

25 year Modernization Need

Based on the student generation rate and the projected number of residential units, 529 TK-6 students are projected from proposed new development. The calculation is included in Table 2.

Table 2:
Projected Students from Proposed Development

Unit Type	Projected Units	Student Generation Rate	Projected Students
Single Family Detached	1,075	.047	51
Single Family Attached	345	.054	19
Multi Family	3,966	.026	103
Affordable	1,103	.323	356
Total	6,489		529

Source: Santa Rosa Elementary School District, Sonoma County's Travel Model (February 7, 2022) Jack Schreder & Associates, Santa Rosa Elementary School District Draft Demographic Analysis & Enrollment Projections.

The District's estimated modernization need generated by students from new residential development is \$18,813,356. The calculation is included in Table 3.

Table 3: <u>25 year Modernization Need</u>	
Per Pupil Modernization Cost	\$35,564
Students Generated	<u>x 529</u>
Modernization Need	\$18,813,356

Source: Santa Rosa Elementary School District, Office of Public School Construction, Jack Schreder & Associates, Sonoma County Travel Model (February 7, 2022), QKA Architects.

Residential Development and Fee Projections

To show a reasonable relationship exists between the construction of new housing units and the need for modernized school facilities, it will be shown that residential construction will create a school facility cost impact on the Santa Rosa Elementary School District by students generated from new development. A total of 6,489 residential units

with a total of 6,876,600 square feet were included to calculate Level I fees. Table 4 includes a square footage summary by unit type. Estimated square footages were provided by the City of Santa Rosa.

Table 4:
Summary of Projected Residential Square Footage

Unit Type	Projected Units	Average Square Footage	Total Square Footage
Single Family	1,075	1,800	1,935,000
Single Family Attached	345	1100	379,500
Multi Family	3,966	900	3,569,400
Affordable	1,103	900	992,700
Total	6,489		6,876,600

Source: Santa Rosa Elementary School District, Sonoma County's Travel Model (February 2, 2022), City of Santa Rosa Planning Department, Jack Schreder & Associates.

Based on the District's modernization need of \$18,813,356 generated by students from residential construction and the total projected residential square footage of 6,876,600, residential construction will create a facilities cost of \$2.74 per square foot.

Table 5:
Facilities Cost per SF from Proposed Residential Construction

Modernization Need	Total Square Footage	Facilities Cost
\$18,813,356	/6,876,600	= \$2.74

Source: Santa Rosa Elementary School District, Jack Schreder & Associates, Office of Public School Construction, City of Santa Rosa Planning Department, QKA Architects

Extent of Mitigation of School Facility Costs Provided by Level I Residential Fees

Based on development projections, the District is projected to collect \$18,813,356 in residential developer fees. The \$18,813,356 in total residential Level I fee revenue will be attributable to new residential development over the next 25 years.

The District's current total student capacity will diminish over time if the District does not modernize its facilities. Without modernization of aging buildings, some facilities will become unavailable, which will decrease the District's total student capacity. New development in the District necessitates that modernization occur in order to continue to have available school housing for newly generated students. As part of these modernization efforts, the District plans to modernize existing schools and to replace some of its existing schools with new buildings on the same site as the existing schools become old, inadequate, and pose health and safety challenges.

Commercial / Industrial Development and Fee Projections

In order to levy developer fees on commercial/industrial development, a district must conduct a study to determine the impact of the increased number of employees anticipated to result from commercial/industrial development upon the cost of providing school facilities within the district. For the purposes of making this determination, the developer fee justification study shall utilize employee generation estimates that are calculated on either an individual project or categorical basis. Those employee generation estimates shall be based upon commercial and industrial factors within the district or upon, in whole or part, the applicable employee generation estimates as set forth in the January 1990 edition of "San Diego Traffic Generators," a report of the San Diego Association of Governments (Education Code Section 17621). The initial study that was completed in January 1990 (updated annually) identifies the number of employees generated for every 1,000 square feet of floor area for several development categories. These generation factors are shown in Table 6.

Table 6 indicates the number of employees generated for every 1,000 square feet of new commercial/industrial development and the number of District households generated for every employee in 12 categories of commercial/industrial development. The number of District households is calculated by adjusting the number of employees for the percentage of employees that live in the District and are heads of households.

School facility costs for development projects not included on the list may be estimated by using the closest employee per 1,000 square feet ratio available for the proposed development.

In addition, an adjustment in the formula is necessary so that students moving into new residential units that have paid residential fees are not counted in the commercial/industrial fee calculation. Based on 2020 US Census data, 55.3 percent of all employees in the District live in existing housing units. The 55.3 percent adjustment eliminates double counting the impact. This adjustment is shown in the worksheets in Appendix C and in Table 6.

When these figures are compared to the cost to house students, it can be shown that each square foot of commercial/industrial development creates a cost impact ranging from \$0.02 to \$2.05. The data in Table 7 is based on the per student costs shown in Table 1. These figures are multiplied by the student yield factor to determine the number of students generated per square foot of commercial/industrial development. To determine the school facilities square foot impact of commercial/industrial development shown in Table 7, the students per square foot are multiplied by the cost of providing school facilities.

Table 6:
Commercial and Industrial Generation Factors

Type of Development	*Employees per 1,000 sf	**Dist HH Per Emp.	***% Emp in Exist HH	Adj.%Emp Dist HH/Emp
Medical Offices	4.27	.2	.553	.1106
Corporate Offices	2.68	.2	.553	.1106
Commercial Offices	4.78	.2	.553	.1106
Lodging	1.55	.3	.553	.1659
Scientific R&D	3.04	.2	.553	.1106
Industrial Parks	1.68	.2	.553	.1106
Industrial/Business Parks	2.21	.2	.553	.1106
Neighborhood Shopping Centers	3.62	.3	.553	.1659
Community Shopping Centers	1.09	.3	.553	.1659
Banks	2.82	.3	.553	.1659
Mini-Storage	.06	.2	.553	.1106
Agriculture	.31	.5	.553	.28

* Source: San Diego Association of Governments.

** Source: Jack Schreder and Associates. Original Research

*** Source: US Census Data, 2020

Table 7:
Commercial and Industrial Facilities Cost Impact

Type of Development	Cost Impact Per Sq. Ft.
Medical Offices	\$1.61
Corporate Offices	\$1.01
Commercial Offices	\$1.80
Lodging	\$0.88
Scientific R&D	\$1.15
Industrial/Business Parks	\$0.63
Industrial/Com Park	\$0.83
Commercial Shopping Centers	\$2.05
Community Shopping Centers	\$0.62
Banks	\$1.60
Mini-Storage	\$0.02
Agriculture	\$0.29

*Sources: San Diego Association of Governments and Jack Schreder and Associates, Original Research.

Table 7 shows that all types of commercial/industrial development will create a square foot cost justifying a commercial/industrial fee. Thus, a reasonable relationship between commercial/industrial development and the impact on the District is shown. Based on this relationship, the levying of commercial/industrial developer fees is justified in the District.

Extent of Mitigation of School Facility Costs Provided by Level I Commercial/Industrial Fees

Each square foot of commercial/industrial development creates a school facility cost ranging from \$0.02 to \$2.05 per square foot. Therefore, the District is justified to collect from \$0.02 to \$0.59 (70% of \$0.84) per square foot of commercial/industrial construction based on each commercial/industrial category.

Summary

The cost impact on the District imposed by new students to be generated from new or expanded residential development is \$2.74 per square foot and from \$0.02 to \$0.59 (70% of \$0.84) per square foot of commercial/industrial development. The Santa Rosa Elementary School District is justified to collect \$2.74 per square foot of residential construction and from \$0.02 to \$0.59 (70% of \$0.84) per square foot of commercial/industrial construction dependent on the commercial/ industrial category.

SECTION II: BACKGROUND OF DEVELOPER FEE LEGISLATION

Initially, the allowable developer fee was limited by Government Code Section 65995 to \$1.50 per square foot of covered or enclosed space for residential development and \$0.25 per square foot of covered or enclosed space of commercial or industrial development. The Level I fee that can be levied is adjusted every two years according to the inflation rate as listed by the state-wide index for Class B construction set by the State Allocation Board. In January 2024, the State Allocation Board changed the Level I fee to \$5.17 per square foot of residential construction and \$0.84 per square foot of commercial and industrial construction.

The fees collected are to be used by the school district for the construction or modernization of school facilities and may be used by the district to pay bonds, notes, loans, leases, or other installment agreements for temporary as well as permanent facilities.

Assembly Bill 3980 (Chapter 418/Statutes of 1988) added Government Code Section 66006 to require segregation of school facilities fees into a separate capital facilities account or fund and specifies that those fees and the interest earned on those fees can only be expended for the purposes for which they were collected.

Senate Bill 519 (Chapter 1346/Statutes of 1987) added Section 17625 to the Education Code. It provides that a school district can charge a fee on manufactured or mobile homes only in compliance with all of the following:

1. The fee, charge, dedication, or other form of requirement is applied to the initial location, installation, or occupancy of the manufactured home or mobile home within the school district.
2. The manufactured home or mobile home is to be located, installed, or occupied on a space or site on which no other manufactured home or mobile home was previously located, installed, or occupied.
3. The manufactured home or mobile home is to be located, installed, or occupied on a space in a mobile home park, on which the construction of the pad or foundation system commenced after September 1, 1986.

Senate Bill 1151 (Chapter 1037/Statutes of 1987) concerns agricultural buildings and adds Section 17622 to the Education Code. It provides that no school fee may be imposed and collected on a greenhouse or other space covered or enclosed for agricultural purposes unless the school district has made findings supported by substantial evidence as follows:

1. The amount of the fees bears a reasonable relationship and is limited to the needs for school facilities created by the greenhouse or other space covered or enclosed for agricultural purposes.

2. The amount of the fee does not exceed the estimated reasonable costs of the school facilities necessitated by the structures as to which the fees are to be collected.
3. In determining the amount of the fees, the school district shall consider the relationship between the proposed increase in the number of employees, if any, the size and specific use of the structure, as well as the cost of construction.

In order to levy developer fees, a study is required to assess the impact of new growth and the ability of the local school district to accommodate that growth. The need for new school construction and modernization must be determined along with the costs involved. The sources of revenue need to be evaluated to determine if the district can fund the new construction and modernization. Finally, a relationship between needs and funding raised by the fee must be quantified.

Assembly Bill 181 (Chapter 1109/Statutes of 1989), which became effective October 2, 1989, was enacted to clarify several areas of developer fee law. Assembly Bill 181 provisions include the following:

1. Exempts residential remodels of less than 500 square feet from fees.
2. Prohibits the use of developer fee revenue for routine maintenance and repair, most asbestos work, and deferred maintenance.
3. Allows the fees to be used to pay for the cost of performing developer fee justification studies.
4. States that fees are to be collected at the time of occupancy, unless the district can justify earlier collection. The fees can be collected at the time the building permit is issued if the district has established a developer fee account and funds have been appropriated for which the district has adopted a proposed construction schedule or plan prior to the issuance of the certificate of occupancy.

5. Clarifies that the establishment or increase of fees is not subject to the California Environmental Quality Act.
6. Clarifies that the impact of commercial/industrial development may be analyzed by categories of development as well as an individual project-by-project basis. An appeal process for individual projects would be required if analysis was done by categories.
7. Changes the frequency of the annual inflation adjustment on the Level I fee to every two years.
8. Exempts from fees - development used exclusively for religious purposes, private schools, and government-owned development.
9. Expands the definition of senior housing, which is limited to the commercial/industrial fee and requires the conversion from senior housing to be approved by the city/county after notification of the school district.
10. Extends the commercial/industrial fee to mobile home parks limited to older persons.

SECTION III: REQUIREMENTS OF AB 1600

Assembly Bill 1600 (Chapter 927/Statutes of 1987) adds Section 66000 through 66003 to the Government Code:

Section 66000 defines various terms used in AB 1600:

"Fee" is defined as monetary exaction (except a tax or a special assessment) which is charged by a local agency to the applicant in connection with the approval of a development project for the purpose of defraying all or a portion of the costs of public facilities related to the development project.

"Development project" is defined broadly to mean any project undertaken for purposes of development. This would include residential, commercial, or industrial projects.

"Public facilities" is defined to include public improvements, public services, and community amenities.

Section 66001 (a) sets forth the requirements for establishing, increasing, or imposing fees. Local agencies are required to do the following:

1. Identify the purpose of the fee.
2. Identify the use to which the fee is to be put.
3. Determine how there is a reasonable relationship between the fee's use and the type of development project on which the fee is imposed.
4. Determine how there is a reasonable relationship between the need for the public facility and the type of development project on which the fee is imposed.

Section 66001 (c) requires that any fee subject to AB 1600 be deposited in an account established pursuant to Government Code Section 66006. Section 66006 requires that development fees be deposited in a capital facilities account or fund. To avoid any commingling of the fees with other revenues and funds of the local agency, the fees can only be expended for the purpose for which they were collected. Any income earned on the fees should be deposited in the account and expended only for the purposes for which the fee was collected.

Section 66001 (d) as amended by Senate Bill 1693 (Monteith/Statutes of 1996, Chapter 569), requires that for the fifth year following the first deposit into a developer fee fund, and for every five years thereafter, a school district must make certain findings as to such funds. These findings are required regardless of whether the funds are committed or uncommitted. Formerly, only remaining unexpended or uncommitted fees were subject to the mandatory findings and potential refund process. Under this section

as amended, relating to unexpended fee revenue, two specific findings must be made as a part of the public information required to be formulated and made available to the public. These findings are:

1. Identification of all sources and amounts of funding anticipated to provide adequate revenue to complete any incomplete improvements identified pursuant to the requirements of Section 66001 (a)(2).
2. A designation of the approximate date upon which the anticipated funding will be received by the school district to complete the identified but as yet, incomplete improvements.

If the two findings are not made, a school district must refund the developer fee revenue on account in the manner provided in Section 66001 (e).

Section 66001 (e) provides that the local agency shall refund to the current record owners of the development project or projects on a prorated basis the unexpended or uncommitted portion of the fees and any accrued interest for which the local agency is unable to make the findings required by Section 66001 (d) that it still needs the fees.

Section 66002 provides that any local agency which levies a development fee subject to Section 66001 may adopt a capital improvement plan which shall be updated annually, and which shall indicate the approximate location, size, time of availability and estimates of cost for all facilities or improvements to be financed by the fees.

Assembly Bill 1600 and the Justification for Levying Developer Fees

Effective January 1, 1989, Assembly Bill 1600 requires that any school district which establishes, increases, or imposes a fee as a condition of approval of development shall make specific findings as follows:

1. A cost nexus must be established. A cost nexus means that the amount of the fee cannot exceed the cost of providing adequate school facilities for students generated by development. Essentially, it prohibits a school district from charging a fee greater than their cost to construct or modernize facilities for use by students generated by development.

2. A benefit nexus must be established. A benefit nexus is established if the fee is used to construct or modernize school facilities benefiting students to be generated from development projects.
3. A burden nexus must be established. A burden nexus is established if a project, by the generation of students, creates a need for additional facilities or a need to modernize existing facilities.

SECTION IV: REVENUE SOURCES FOR FUNDING FACILITIES

Two general sources exist for funding facility construction and modernization - state sources and local sources. The District has considered the following available sources:

State Sources

State School Facility Program

Senate Bill 50 reformed the State School Building Lease-Purchase Program in August of 1998. The new program, entitled the School Facility Program, provides funding under a “grant” program once a school district establishes eligibility. Funding required from districts will be a 50/50 match for construction projects and 60/40 (District/State) match for modernization projects. Districts may levy the current statutory developer fee as long as a district can justify collecting that fee. If a district desires to collect more than the statutory fee (Level 2 or Level 3), that district must meet certain requirements outlined in the law, as well as conduct a needs assessment to enable a higher fee to be calculated.

The District is in the process of pursuing State facility funds.

Local Sources

Mello-Roos Community Facilities Act

The Mello-Roos Community Facilities Act of 1982 allows school districts to establish a community facilities district in order to impose a special tax to raise funds to finance the construction of school facilities.

1. The voter approved tax levy requires a two-thirds vote by the voters of the proposed Mello-Roos district.
2. If a Mello-Roos district is established in an area in which fewer than twelve registered voters reside, the property owners may elect to establish a Mello-Roos district.

General Obligation Bonds

General Obligation (GO) bonds may be issued by any school district for the purposes of purchasing real property or constructing or purchasing buildings or equipment "of a permanent nature." Because GO bonds are secured by an ad valorem tax levied on all taxable property in the district, their issuance is subject to two-thirds voter approval or 55% majority vote under Proposition 39 in an election. School districts are obligated, in the event of delinquent payments on the part of the property owners, to raise the amount of tax levied against the non-delinquent properties to a level sufficient to pay the principal and interest coming due on the bonds.

The District passed three bonds in the amounts of \$80 million in June and November of 2014 and in 2016 for a total of \$240 million. Bond funds have been expended or are encumbered for the District's current facility needs.

Developer Fees

The District's developer fees are dedicated to the current needs related directly to modernization and replacement of school facilities.

School District General Funds

The District's general funds are needed by the District to provide for the operation of its instructional program.

Expenditure of Lottery Funds

Government Code Section 8880.5 states: "It is the intent of this chapter that all funds allocated from the California State Lottery Education Fund shall be used

exclusively for the education of pupils and students, and no funds shall be spent for acquisition of real property, construction of facilities, financing research, or any other non-instructional purpose."

SECTION V: ESTABLISHING THE COST, BENEFIT AND BURDEN NEXUS

In accordance with Government Code Section 66001, the District has established a cost nexus and identified the purpose of the fee, established a benefit nexus, and a burden nexus:

Establishment of a Cost Nexus & Identify Purpose of the Fee

The Santa Rosa Elementary School District chooses to replace and/or modernize facilities for the additional students created by development in the district and the cost to replace and/or modernize facilities exceeds the amount of developer fees to be collected.

The cost impact on the District imposed by new students to be generated from new or expanded residential development is \$2.74 per square foot and from \$0.02 to \$0.59 (70% of \$0.84) per square foot of commercial/industrial development. The Santa Rosa Elementary School District is justified to collect \$2.74 per square foot of residential construction and from \$0.02 to \$0.59 (70% of \$0.84) per square foot of commercial/industrial construction dependent on the commercial/ industrial category.

Establishment of a Benefit Nexus

Students generated by new residential, commercial, and industrial development will be attending District schools. Housing District students in replaced and/or modernized facilities will directly benefit those students from the new development projects upon which the fee is imposed, therefore, a benefit nexus is established.

Establishment of a Burden Nexus

Future residential and commercial/industrial development will cause new families to move into the District and, consequently, will generate additional students in the District. While facilities are currently designed to meet the projected student enrollment, the existing facilities will need to remain in sufficient condition to maintain existing levels of service for the newly generated students. Future residential and commercial/industrial development, therefore, creates a need for the reconstruction and/or modernization of existing school facilities. The fee's use for school facility reconstruction and/or modernization efforts is, therefore, reasonably related to the future residential and commercial/industrial development upon which it is imposed.

The need for reconstructing and/or modernizing facilities will be, in part, satisfied by the levying of developer fees on new residential and commercial/industrial developments, therefore, a burden nexus is established.

SECTION VI: FACILITY FUNDING ALTERNATIVES

The District does not currently have funds to provide for the shortfall in modernization costs. We suggest the District continue to consider and pursue all State funding sources for the modernization of facilities.

STATEMENT TO IDENTIFY PURPOSE OF FEE

It is a requirement of AB 1600 that the District identify the purpose of the fee. The purpose of fees being levied shall be used for the replacement and/or modernization of school facilities. The District will provide for the replacement and/or modernization of school facilities, in part, with developer fees. Projects included in the 2022 \$125 million bond exceed available bond funds. Developer fees will be used to assist with projects including, but not limited to repairing and replacing portables, repairing leaky roofs, and updating plumbing, electrical, and cooling systems. Facility upgrades are necessary to provide adequate housing to students generated from new development. The District's 2016, 2022, and 2023 Facility Master Plans provide examples of the types of projects that can be funded by the developer fees and a summary of facility needs and costs. In

addition to modernization and reconstruction needs, the District may have the need in the future to increase capacity as residential units are constructed. Projects will be funded as developer fee revenue is generated.

ESTABLISHMENT OF A SPECIAL ACCOUNT

Pursuant to Government Code section 66006, the District has established a special account in which fees for capital facilities are deposited. The fees collected in this account will be expended only for the purpose for which they were collected. Any interest income earned on the fees that are deposited in such an account must remain with the principal. The school district must make specific information available to the public within 180 days of the end of each fiscal year pertaining to each developer fee fund. The information required to be made available to the public by Section 66006 (b) (1) was amended by SB 1693 and includes specific information on fees expended and refunds made during the year.

RECOMMENDATION

Based on the fee justification provided in this report, it is recommended that the Santa Rosa Elementary School District levy residential development fees and commercial/industrial fees up to the statutory fee for which justification has been determined.

SOURCES

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APPENDIX A
CONSTRUCTION COSTS

Santa Rosa Elementary School District
Per Pupil Construction Costs

Grade Level	Square Feet Per Pupil*	Cost Per Square Foot**	Construction Cost	Soft Costs (25%)	Total
K-6	71	\$ 975	\$ 69,225	\$ 17,306	\$ 86,531

**source: California Department of Education*

***source: Quattrocchi Kwok Architects*

APPENDIX B
PER PUPIL GRANT AMOUNTS

ATTACHMENT B

ANNUAL ADJUSTMENT TO SCHOOL FACILITY PROGRAM GRANTS

State Allocation Board Meeting, January 24, 2024

Grant Amount Adjustments

New Construction	SFP Regulation Section	Adjusted Grant Per Pupil Effective 1-1-23	Adjusted Grant Per Pupil Effective 1-1-24
Elementary	1859.71	\$15,983	\$15,770
Middle	1859.71	\$16,904	\$16,679
High	1859.71	\$21,509	\$21,223
Special Day Class – Severe	1859.71.1	\$44,911	\$44,314
Special Day Class – Non-Severe	1859.71.1	\$30,036	\$29,637
Automatic Fire Detection/Alarm System – Elementary	1859.71.2	\$19	\$19
Automatic Fire Detection/Alarm System – Middle	1859.71.2	\$25	\$25
Automatic Fire Detection/Alarm System – High	1859.71.2	\$43	\$42
Automatic Fire Detection/Alarm System – Special Day Class – Severe	1859.71.2	\$80	\$79
Automatic Fire Detection/Alarm System – Special Day Class – Non-Severe	1859.71.2	\$57	\$56
Automatic Sprinkler System – Elementary	1859.71.2	\$268	\$264
Automatic Sprinkler System – Middle	1859.71.2	\$319	\$315
Automatic Sprinkler System – High	1859.71.2	\$331	\$327
Automatic Sprinkler System – Special Day Class – Severe	1859.71.2	\$846	\$835
Automatic Sprinkler System – Special Day Class – Non-Severe	1859.71.2	\$567	\$559

ATTACHMENT B

ANNUAL ADJUSTMENT TO SCHOOL FACILITY PROGRAM GRANTS

State Allocation Board Meeting, January 24, 2024

Grant Amount Adjustments

Modernization	SFP Regulation Section	Adjusted Grant Per Pupil Effective 1-1-23	Adjusted Grant Per Pupil Effective 1-1-24
Elementary	1859.78	\$6,086	\$6,005
Middle	1859.78	\$6,436	\$6,350
High	1859.78	\$8,427	\$8,315
Special Day Class - Severe	1859.78.3	\$19,396	\$19,138
Special Day Class – Non-Severe	1859.78.3	\$12,977	\$12,804
State Special School – Severe	1859.78	\$32,330	\$31,900
Automatic Fire Detection/Alarm System – Elementary	1859.78.4	\$198	\$195
Automatic Fire Detection/Alarm System – Middle	1859.78.4	\$198	\$195
Automatic Fire Detection/Alarm System – High	1859.78.4	\$198	\$195
Automatic Fire Detection/Alarm System – Special Day Class – Severe	1859.78.4	\$544	\$537
Automatic Fire Detection/Alarm System – Special Day Class – Non-Severe	1859.78.4	\$365	\$360
Over 50 Years Old – Elementary	1859.78.6	\$8,454	\$8,342
Over 50 Years Old – Middle	1859.78.6	\$8,942	\$8,823
Over 50 Years Old – High	1859.78.6	\$11,705	\$11,549
Over 50 Years Old – Special Day Class – Severe	1859.78.6	\$26,948	\$26,590
Over 50 Years Old – Special Day Class – Non-Severe	1859.78.6	\$18,019	\$17,779
Over 50 Years Old – State Special Day School – Severe	1859.78.6	\$44,910	\$44,313

APPENDIX C

**COMMERCIAL/INDUSTRIAL
CALCULATIONS**

Santa Rosa Elementary School District						
Commercial/Industrial Calculations						
	EMP/ 1000 SQ.FT	DIST.HH/ EMP	HH/SF	% EMP IN EXIST HH	ADJUSTED HH/SF	ADJ % DIST HH/EMP
MEDICAL	4.27	0.2	0.000854	0.553	0.000472262	0.1106
CORP. OFFICE	2.68	0.2	0.000536	0.553	0.000296408	0.1106
COM. OFFICE	4.78	0.2	0.000956	0.553	0.000528668	0.1106
LODGING	1.55	0.3	0.000465	0.553	0.0002571	0.1659
R&D	3.04	0.2	0.000608	0.553	0.000336224	0.1106
IN. PARK	1.68	0.2	0.000336	0.553	0.000185808	0.1106
IN/COM PARK	2.21	0.2	0.000442	0.553	0.000244426	0.1106
NBHD COMM SC	3.62	0.3	0.001086	0.553	0.000600558	0.1659
COMMUNITY SC	1.09	0.3	0.000327	0.553	0.000180831	0.1659
BANKS	2.82	0.3	0.000846	0.553	0.000467838	0.1659
MINI-STORAGE	0.06	0.2	0.000012	0.553	0.000006636	0.1106
AGRICULTURE	0.31	0.5	0.000155	0.553	0.0000857	0.28
STUDENT GENERATION RATE			MODERNIZATION COST PER STUDENT			
(weighted Student Generation Calculations attached)						
TK-6	0.0960		TK-6	\$35,564		
STUDENTS PER SQUARE FOOT						
(YIELD FACTORS X ADJ HH/SQ. FT IN COLUMN F)						
	TK-6					
MEDICAL	0.000045					
CORP. OFFICE	0.000028					
COM. OFFICE	0.000051					
LODGING	0.000025					
R&D	0.000032					
IN. PARK	0.000018					
IN/COM PARK	0.000023					
COM. SC.	0.000058					
COMMUNITY SC	0.000017					
BANKS	0.000045					
MINI STORAGE	0.000001					
AGRICULTURE	0.000008					
COSTS PER SQUARE FOOT						
(STUDENTS/ SQ. FOOT X STUDENT COST/SQ. FOOT IN EACH CATEGORY)						
	TK-6					
MEDICAL	\$1.61					
CORP. OFFICE	\$1.01					
COM. OFFICE	\$1.80					
LODGING	\$0.88					
R&D	\$1.15					
IN. PARK	\$0.63					
IN/COM PARK	\$0.83					
COM. SC.	\$2.05					
COMMUNITY SC	\$0.62					
BANKS	\$1.60					
MINI STORAGE	\$0.02					
AGRICULTURE	\$0.29					

Weighted Student Generation Rate

K-6 Projected Students

Housing Type	Projected Units	SGR	Projected Students
SF	1103	0.047	52
SFA	3966	0.054	214
MF	345	0.026	9
AFF	1075	0.323	347
Total	6489		622

Weighted Student Generation Rate

Total Units	Projected Students	Weighted SGR
6489	622	0.096

APPENDIX D

DEVELOPMENT SUMMARY

Projected Development

School District	TOTAL HU			TOTAL HU			*Delta HU		
	SF19	MF19	SH19	2019	SF40	MF40	SH40	2040	2019 - 2040
Santa Rosa Elementary	16,804	9,984	2,326	29,114	18,099	15,178	2,507	35,784	6,670

Source: County of Sonoma--Extracted from the Sonoma County Travel Model 2-7-2022 (4 Traffic Analysis Zones)

Key:

- SF Single Family Housing Units
- MF Multifamily Housing Units
- SH Senior/Group Housing Units

Projected Unit Types

Unit Type	Projected Units*
Single Family Detached	1,075
Single Family Attached	345
Multi Family	3,966
Affordable	1,103
Total	6,489

* Source: Projected unit types based on City of Santa Rosa recent construction data.



Level I Developer Fee Study
for
Santa Rosa High School District

Anna Trunnell, Superintendent

January 30, 2024

Board of Directors

Omar Medina, President
Ever Flores, Vice President
Roxanne McNally, Clerk
Alegria De La Cruz, Director
Stephanie Manieri, Director
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EXECUTIVE SUMMARY

- Education Code Section 17620 authorizes school districts to levy a fee, charge, dedication, or other form of requirement against any development project for the construction or modernization of school facilities, provided the District can show justification for levying of fees.
- In January 2024, the State Allocation Board's biennial inflation adjustment changed the fee to \$5.17 per square foot for residential construction and \$0.84 per square foot for commercial/industrial construction.
- The Santa Rosa High School District currently shares developer fees with its feeder districts. The developer fee sharing arrangement between the school districts is currently 30 percent for the high school district and 70 percent for the feeder districts.
- The Santa Rosa High School District's portion of the current Level I residential statutory fee is \$1.55 (30% of \$5.17) per square foot of construction. Therefore, the District is justified to collect \$1.55 per square foot of residential construction.
- The Santa Rosa High School District's portion of the current Level I commercial/industrial statutory fee is \$0.25 (30% of \$0.84) per square foot of construction. The Level I fee calculations justify a commercial/industrial fee of \$0.25 for commercial/industrial construction with the exception of mini storage. The mini storage category of construction should be collected at \$0.03 per square foot.
- In general, it is fiscally more prudent to extend the useful life of an existing facility than to construct new facilities when possible. The cost to modernize facilities is approximately 41.1 percent of the cost to construct new facilities.
- The residential justification is based on the Santa Rosa High School District's projected modernization need of \$95,692,775 for students generated from residential development over the next 25 years and the projected residential square footage of 22,715,600.

- Based on the modernization need for students generated from projected residential development and the projected residential square footage, each square foot of residential construction will create a school facilities cost of \$4.21 (\$95,692,775/22,715,600).
- Each square foot of commercial/industrial construction will create a school facilities cost ranging from \$0.03 to \$2.99 per square foot of new commercial/industrial construction.
- For both residential and commercial/industrial development, the fees authorized by Government Code section 65995 are justified.

INTRODUCTION

In September 1986, the Governor signed into law Assembly Bill 2926 (Chapter 887/Statutes 1986) which granted school district governing boards the authority to impose developer fees. This authority is codified in Education Code Section 17620 which states in part "...the governing board of any school district is authorized to levy a fee, charge, dedication or other form of requirement against any development project for the construction or modernization of school facilities."

The Level I fee that can be levied is adjusted every two years according to the inflation rate, as listed by the state-wide index for Class B construction set by the State Allocation Board. In January 1992, the State Allocation Board increased the Level I fee to \$1.65 per square foot for residential construction and \$0.27 per square foot for commercial/industrial construction.

Senate Bill 1287 (Chapter 1354/Statutes of 1992) effective January 1, 1993, affected the facility mitigation requirements a school district could impose on developers. Senate Bill 1287 allowed school districts to levy an additional \$1.00 per square foot of residential construction (Government Code Section 65995.3). The authority to levy the additional \$1.00 was rescinded by the failure of Proposition 170 on the November 1993 ballot.

In January 1994, the State Allocation Board's biennial inflation adjustment changed the fee to \$1.72 per square foot for residential construction and \$0.28 per square foot for commercial/industrial construction.

In January 1996, the State Allocation Board's biennial inflation adjustment changed the fee to \$1.84 per square foot for residential construction and \$0.30 per square foot for commercial/industrial construction.

In January 1998, the State Allocation Board's biennial inflation adjustment changed the fee to \$1.93 per square foot for residential construction and \$0.31 per square foot for commercial/industrial construction.

In January 2000, the State Allocation Board's biennial inflation adjustment changed the fee to \$2.05 per square foot for residential construction and \$0.33 per square foot for commercial/industrial construction.

In January 2002, the State Allocation Board's biennial inflation adjustment changed the fee to \$2.14 per square foot for residential construction and \$0.36 per square foot for commercial/industrial construction.

In January 2004, the State Allocation Board's biennial inflation adjustment changed the fee to \$2.24 per square foot for residential construction and \$0.41 per square foot for commercial/industrial construction.

In January 2006, the State Allocation Board's biennial inflation adjustment changed the fee to \$2.63 per square foot for residential construction and \$0.42 per square foot for commercial/industrial construction.

In January 2008, the State Allocation Board's biennial inflation adjustment changed the fee to \$2.97 per square foot for residential construction and \$0.47 per square foot for commercial/industrial construction.

In January 2010, the State Allocation Board's biennial inflation adjustment maintained the fee at \$2.97 per square foot for residential construction and \$0.47 per square foot for commercial/industrial construction.

In January 2012, the State Allocation Board's biennial inflation adjustment changed the fee to \$3.20 per square foot for residential construction and \$0.51 per square foot for commercial/industrial construction.

In January 2014, the State Allocation Board's biennial inflation adjustment changed the fee to \$3.36 per square foot for residential construction and \$0.54 per square foot for commercial/industrial construction.

In February 2016, the State Allocation Board's biennial inflation adjustment changed the fee to \$3.48 per square foot for residential construction and \$0.56 per square foot for commercial/industrial construction.

In January 2018, the State Allocation Board's biennial inflation adjustment changed the fee to \$3.79 per square foot for residential construction and \$0.61 per square foot for commercial/industrial construction.

In January 2020, the State Allocation Board's biennial inflation adjustment changed the fee to \$4.08 per square foot for residential construction and \$0.66 per square foot for commercial/industrial construction.

In February 2022, the State Allocation Board's biennial inflation adjustment changed the fee to \$4.79 per square foot for residential construction and \$0.78 per square foot for commercial/industrial construction.

In January 2024, the State Allocation Board's biennial inflation adjustment changed the fee to \$5.17 per square foot for residential construction and \$0.84 per square foot for commercial/industrial construction.

The next adjustment to the fee will occur at the January 2026 State Allocation Board meeting.

In order to levy a fee, a district must make a finding that the fee to be paid bears a reasonable relationship and be limited to the needs of the community for elementary or high school facilities and be reasonably related to the need for schools caused by the development. Fees are different from taxes and do not require a vote of the electorate. Fees may be used only for specific purposes and there must be a reasonable relationship between the levying of fees and the impact created by development.

In accordance with the recent decision in the Cresta Bella LP v. Poway Unified School District, 218 Cal. App.4th 438(2013) court case, school districts are now required to demonstrate that reconstruction projects will generate an increase in the student population thereby creating an impact on the school district's facilities. School districts must establish a reasonable relationship between an increase in student facilities needs and the reconstruction project in order to levy developer fees.

Purpose of Study

This study will demonstrate the relationship between residential and commercial/industrial growth and the need for the modernization of school facilities in the Santa Rosa High School District.

SECTION I: DEVELOPER FEE JUSTIFICATION

Developer fee law requires that before fees can be levied a district must find that justification exists for the fee. Government Code Section 66001 (g) states that a fee shall not include the costs attributable to existing deficiencies in public facilities but may include the costs attributable to the increased demand for public facilities reasonably related to the development project in order to refurbish existing facilities to maintain the existing level of service or achieve an adopted level of service that is consistent with a general plan. This section of the study will show that justification does exist for levying developer fees in the Santa Rosa High School District.

Facilities Capacity

The District's capacity is adequate to house the District's current student population. Facility needs exist regardless of the availability of capacity to house student enrollments, inclusive of student enrollment generated from new development. New students generated from future development will create a burden on existing school facilities. Capital improvements, including upgrades or the replacement of existing facilities with new facilities for their continued long-term use, are necessary to adequately house future enrollment growth at all school levels.

The District's current total student capacity will diminish over time if the District does not modernize its facilities. Without modernization of aging buildings, some facilities will become unavailable which will decrease the District's total student capacity. New development in the District necessitates that modernization occur in order to continue to have available school housing for newly generated students. As part of these modernization efforts, the District plans to modernize existing schools and to replace some of its existing schools with new buildings on the same site as the existing schools become old, inadequate, and pose health and safety challenges.

Modernization and Reconstruction

Extending the useful life of a school is a cost effective and prudent way to house students generated from future development. The state of California recognizes the need to extend the life of existing schools and provides modernization funding through the State School Facility Program. For the purpose of this report, modernization and reconstruction are used interchangeably since many of the improvements are common to both programs. Developer fees may not be used for regular maintenance, routine repair of school buildings and facilities, or deferred maintenance. Projects included in the 2022 \$125 million bond exceed available bond funds. Developer fees will be used to assist with projects including, but not limited to roofing, plumbing, heating, cooling, dry rot repair, and infrastructure improvements. Facility upgrades are necessary to provide adequate housing to students generated from new development. The District's 2016, 2022, and 2023 Facility Master Plans provide examples of the types of projects that can be funded by the developer fees and a summary of facility needs and costs. In addition to modernization and reconstruction needs, the District may have the need in the future to increase capacity as residential units are constructed. Projects will be funded as developer fee revenue is generated. The authorization to justify modernization and reconstruction of school facilities and extend the useful life of existing schools is contained in Education Code Section 17620 and Government Code Section 66001 (g). School districts are permitted to modernize or replace existing or build new school facilities with developer fees as justified by this Study.

Modernization Need

As new students are generated by new development, the need to increase the useful life of school facilities will be necessary. In order to calculate the District's estimated modernization need generated by students from new development, it is necessary to determine the following factors: the number of units included in proposed developments, the District student yield factor, and the per pupil cost to modernize facilities.

Projected Development

The Santa Rosa High School District is located within the City of Santa Rosa, City of Rohnert Park, City of Windsor, and the County of Sonoma planning jurisdictions.

Based on information extracted from the Sonoma County Travel Model (February 7, 2022), there is the potential for 19,212 residential units to be constructed in the next 25 years. Based on historical development information provided by the City of Santa Rosa, of the 19,212 units, an estimated 5,848 are projected to be single family detached, 808 single family attached, 9,290 multi family, and 3,266 affordable units. Appendix D includes a development summary provided by the County of Sonoma and the breakdown of unit types based on information provided by the City of Santa Rosa. A total of 19,212 residential units were included to calculate Level I fees.

The School Facility Program allows districts to apply for modernization funding for classrooms over 25 (permanent) or 20 (portable) years, meaning that school facilities are presumed to be eligible for, and therefore need, modernization after that time period. It is therefore generally presumed that school facilities have a useful life span of 25 years before modernization is needed in order to maintain the same level of service as previously existed. The same would be true for modernization of buildings 25 years after their initial modernization. In some cases, these older buildings may need to be closed entirely for the health and safety of students, teachers, staff, and other occupants. Aging infrastructure and building problems can profoundly impact a school's ability to safely remain in service and to continue delivering the instructional program to students at existing levels of service. Therefore, the District's modernization needs are considered over a 25 year period, and a 25 year projection has been included in the Study when considering the homes that will generate students for the facilities in question. Future development will generate additional students for the District to house. Developer fees generated from future development may be used to modernize or construct facilities to house students from planned future development.

School facilities have a limited usable lifespan, and school districts must consider the lifespan for each facility when planning and determining student housing needs in the future. Residential units will be built at different times over the coming years, and it is difficult to predict when construction on these projects will be complete. Additionally, the homes in these developments may be immediately occupied with families with school-aged children, or they may not be occupied by school-aged children for another five, ten, or fifteen years as young people who move in begin starting to have families. Thus, the District must be prepared to house students from new developments for the next several decades.

Student Generation Rate

In determining the impact of new development, the District is required to show how many students will be generated from the new development. In order to ensure that new development is paying only for the impact of those students that are being generated by new homes and businesses, the student generation rate is applied to the number of new housing units to determine development-related impacts. The student generation rate identifies the number of students per housing unit and provides a link between new residential construction projects and projected enrollment.

To identify the number of students anticipated to be generated by new residential development, a student yield factor of .066 for single family detached units, .076 for single family attached units, .035 for multi family units and .399 for affordable units have been utilized for the Santa Rosa High School District. The yield factors are based on Student Generation rates calculated for the District's May 2023 *Demographic Analysis and Enrollment Projections Study*.

Construction Cost

The construction cost per 7-12 pupil is \$109,281. Construction costs are based on square footage information provided by the California Department of Education and construction costs provided by Quattrocchi Kwok Architects (QKA). Appendix A includes the cost per student calculations. Table 1 shows the estimated weighted cost to construct facilities per 7-12 pupil.

Table 1:
Construction Costs

Grade Level				Construction Costs	
7-8				\$103,594	
9-12				\$112,125	
Weighted Average Calculation					
	\$103,594	x	2	=	\$207,188
	\$112,125	x	4	=	\$448,500
	Total				\$655,688
Weighted Average	\$655,688	/	6	=	\$109,281

Source: California Department of Education, Quattrocchi Kwok Architects.

Modernization Cost

The cost to modernize facilities is 42.2 percent of new construction costs. The percentage is based on the comparison of the State per pupil modernization grant (including 3% for Americans with Disabilities and Fire, Life Safety improvements) and the State per pupil new construction grant. For example, the State provides \$21,223 per 9-12 pupil to construct new facilities and \$8,315 to modernize facilities, which is 39.2 percent ($\$8,315 / \$21,223$) of the new construction grant amount. In addition, the State provides a minimum of three percent for ADA/FLS improvements which are required by the Department of State Architect’s (DSA) office. Based on the per pupil grant amounts and the ADA/FLS costs, the estimated cost to modernize facilities is 42.2 percent of the cost to construct facilities. The School Facility Program per pupil grant amounts are included in Appendix B.

The construction cost per 7-12 pupil is \$109,281 and is outlined in Table 1. Therefore, the per pupil cost to modernize facilities per 7-12 pupil is \$46,117 ($\$109,281 \times .422$).

25 year Modernization Need

Based on the student generation rate and the projected number of residential units, 2,075 7-12 students are projected from proposed new development. The calculation is included in Table 2.

Table 2:
Projected Students from Proposed Development

Unit Type	Projected Units	Student Generation Rate	Projected Students
Single Family Detached	5,848	.066	386
Single Family Attached	808	.076	61
Multi Family	9,290	.035	325
Affordable	3,266	.399	1,303
Total	19,212		2,075

Source: Santa Rosa High School District, Sonoma County's Travel Model (February 7, 2022), Jack Schreder & Associates, Santa Rosa High School District Draft Demographic Analysis & Enrollment Projections.

The District's estimated modernization need generated by students from new residential development is \$95,692,775. The calculation is included in Table 3.

Table 3: <u>25 year Modernization Need</u>	
Per Pupil Modernization Cost	\$46,117
Students Generated	x 2,075
Modernization Need	\$95,692,775

Source: Santa Rosa High School District, Office of Public School Construction, Jack Schreder & Associates, Sonoma County Travel Model (February 7, 2022), QKA Architects.

Residential Development and Fee Projections

To show a reasonable relationship exists between the construction of new housing units and the need for modernized school facilities, it will be shown that residential construction will create a school facility cost impact on the Santa Rosa High School District by students generated from new development. A total of 19,212 residential units with a total of 22,715,600 square feet were included to calculate Level I fees. Table 4 includes a square footage summary by unit type. Estimated square footages were provided by the City of Santa Rosa.

Table 4:
Summary of Projected Residential Square Footage

Unit Type	Projected Units	Average Square Footage	Total Square Footage
Single Family	5,848	1,800	10,526,400
Single Family Attached	808	1100	888,800
Multi Family	9,290	900	8,361,000
Affordable	3,266	900	2,939,400
Total	19,212		22,715,600

Source: Santa Rosa High School District, Sonoma County's Travel Model (February 2, 2022), City of Santa Rosa Planning Department, Jack Schreder & Associates.

Based on the District's modernization need of \$95,692,775 generated by students from residential construction and the total projected residential square footage of 22,715,600, residential construction will create a facilities cost of \$4.21 per square foot.

Table 5:
Facilities Cost per SF from Proposed Residential Construction

Modernization Need	Total Square Footage	Facilities Cost
\$95,692,775	/22,715,600	= \$4.21

Source: Santa Rosa High School District, Jack Schreder & Associates, Office of Public School Construction, City of Santa Rosa Planning Department, Sonoma County's Travel Model (February 7, 2022), QKA Architects

Extent of Mitigation of School Facility Costs Provided by Level I Residential Fees

Based on development projections, an estimated 22,715,600 residential square feet may be constructed in the next 25 years. Based on the District's share of the level statutory Level I fee of \$1.55 (30% of \$5.17) per square foot, the District is projected to collect \$35,209,180 (\$1.55 x 22,715,600) in residential developer fees. The \$35,209,180 in total residential Level I fee revenue will cover only 37 percent of the \$95,692,775 in total school facility modernization costs attributable to new residential development over the next 25 years.

The District's current total student capacity will diminish over time if the District does not modernize its facilities. Without modernization of aging buildings, some facilities will become unavailable which will decrease the District's total student capacity. New development in the District necessitates that modernization occur in order to continue to have available school housing for newly generated students. As part of these modernization efforts, the District plans to modernize existing schools and to replace some of its existing schools with new buildings on the same site as the existing schools become old, inadequate, and pose health and safety challenges.

Commercial / Industrial Development and Fee Projections

In order to levy developer fees on commercial/industrial development, a district must conduct a study to determine the impact of the increased number of employees anticipated to result from commercial/industrial development upon the cost of providing school facilities within the district. For the purposes of making this determination, the developer fee justification study shall utilize employee generation estimates that are calculated on either an individual project or categorical basis. Those

employee generation estimates shall be based upon commercial and industrial factors within the district or upon, in whole or part, the applicable employee generation estimates as set forth in the January 1990 edition of "San Diego Traffic Generators," a report of the San Diego Association of Governments (Education Code Section 17621). The initial study that was completed in January of 1990 (updated annually) identifies the number of employees generated for every 1,000 square feet of floor area for several development categories. These generation factors are shown in Table 6.

Table 6 indicates the number of employees generated for every 1,000 square feet of new commercial/industrial development and the number of District households generated for every employee in 12 categories of commercial/industrial development. The number of District households is calculated by adjusting the number of employees for the percentage of employees that live in the District and are heads of households. School facility costs for development projects not included on the list may be estimated by using the closest employee per 1,000 square feet ratio available for the proposed development.

In addition, an adjustment in the formula is necessary so that students moving into new residential units that have paid residential fees are not counted in the commercial/industrial fee calculation. Based on 2020 US Census data, 55.3 percent of all employees in the District live in existing housing units. The 55.3 percent adjustment eliminates double counting the impact. This adjustment is shown in the worksheets in Appendix C and in Table 6.

When these figures are compared to the cost to house students, it can be shown that each square foot of commercial/industrial development creates a cost impact ranging from \$0.03 to \$2.99. The data in Table 7 is based on the per student costs shown in Table 1. These figures are multiplied by the student yield factor to determine the number of students generated per square foot of commercial/industrial development. To determine the school facilities square foot impact of commercial/industrial development shown in Table 7, the students per square foot are multiplied by the cost of providing school facilities.

Table 6:
Commercial and Industrial Generation Factors

Type of Development	*Employees per 1,000 sf	**Dist HH Per Emp.	***% Emp in Exist HH	Adj.%Emp Dist HH/Emp
Medical Offices	4.27	.2	.553	.1106
Corporate Offices	2.68	.2	.553	.1106
Commercial Offices	4.78	.2	.553	.1106
Lodging	1.55	.3	.553	.1659
Scientific R&D	3.04	.2	.553	.1106
Industrial Parks	1.68	.2	.553	.1106
Industrial/Business Parks	2.21	.2	.553	.1106
Neighborhood Shopping Centers	3.62	.3	.553	.1659
Community Shopping Centers	1.09	.3	.553	.1659
Banks	2.82	.3	.553	.1659
Mini-Storage	.06	.2	.553	.1106
Agriculture	.31	.5	.553	.28

* Source: San Diego Association of Governments.

** Source: Jack Schreder and Associates. Original Research

*** Source: US Census Data, 2020

Table 7:
Commercial and Industrial Facilities Cost Impact

Type of Development	Cost Impact Per Sq. Ft.
Medical Offices	\$2.35
Corporate Offices	\$1.48
Commercial Offices	\$2.63
Lodging	\$1.28
Scientific R&D	\$1.67
Industrial/Business Parks	\$0.93
Industrial/Com Park	\$1.22
Commercial Shopping Centers	\$2.99
Community Shopping Centers	\$0.90
Banks	\$2.33
Mini-Storage	\$0.03
Agriculture	\$0.43

*Sources: San Diego Association of Governments and Jack Schreder and Associates, Original Research.

Table 7 shows that all types of commercial/industrial development will create a square foot cost justifying a commercial/industrial fee. Thus, a reasonable relationship between commercial/industrial development and the impact on the District is shown. Based on this relationship, the levying of commercial/industrial developer fees is justified in the District.

Extent of Mitigation of School Facility Costs Provided by Level I Commercial/Industrial Fees

Each square foot of commercial/industrial development creates a school facility cost ranging from \$0.03 to \$2.99 per square foot. The cost per square foot of commercial/industrial construction exceeds the District's 30 percent of the Level I commercial fee of \$0.25 (30 percent of \$0.84) in all categories of construction, with the exception of mini storage. Mini storage should be collected at \$0.03 per square foot of construction.

Summary

The cost impact on the District imposed by new students to be generated from new or expanded residential and commercial/industrial development is greater than the District's share of developer fees. Each square foot of residential development creates a school facility cost of \$4.21 per square foot. Each square foot of commercial/industrial development creates a school facility cost ranging from \$0.03 to \$2.99 per square foot. The cost to provide additional school facilities exceeds the amount of residential and commercial/industrial fees to be generated directly and indirectly by residential construction. However, the District currently has a Level I Fee Sharing Agreement with its feeder elementary districts. The High School District collects 30 percent of the Level I fee and the feeders collect 70 percent of the fee. Therefore, the Santa Rosa High School District is justified to collect \$1.55 (30 percent of \$5.17) per square foot of residential construction and \$0.25 (30 percent of \$0.84) per square foot of commercial/industrial construction with the exception of mini storage. The mini storage category of construction should be collected at the rate of \$0.03 per square foot.

SECTION II: BACKGROUND OF DEVELOPER FEE LEGISLATION

Initially, the allowable developer fee was limited by Government Code Section 65995 to \$1.50 per square foot of covered or enclosed space for residential development and \$0.25 per square foot of covered or enclosed space of commercial or industrial development. The Level I fee that can be levied is adjusted every two years according to the inflation rate as listed by the state-wide index for Class B construction set by the State Allocation Board. In January 2024, the State Allocation Board changed the Level I fee to \$5.17 per square foot of residential construction and \$0.84 per square foot of commercial/industrial construction.

The fees collected are to be used by the school district for the construction or modernization of school facilities and may be used by the district to pay bonds, notes, loans, leases, or other installment agreements for temporary as well as permanent facilities.

Assembly Bill 3980 (Chapter 418/Statutes of 1988) added Government Code Section 66006 to require segregation of school facilities fees into a separate capital facilities account or fund and specifies that those fees and the interest earned on those fees can only be expended for the purposes for which they were collected.

Senate Bill 519 (Chapter 1346/Statutes of 1987) added Section 17625 to the Education Code. It provides that a school district can charge a fee on manufactured or mobile homes only in compliance with all of the following:

1. The fee, charge, dedication, or other form of requirement is applied to the initial location, installation, or occupancy of the manufactured home or mobile home within the school district.
2. The manufactured home or mobile home is to be located, installed, or occupied on a space or site on which no other manufactured home or mobile home was previously located, installed, or occupied.

3. The manufactured home or mobile home is to be located, installed, or occupied on a space in a mobile home park, on which the construction of the pad or foundation system commenced after September 1, 1986.

Senate Bill 1151 (Chapter 1037/Statutes of 1987) concerns agricultural buildings and adds Section 17622 to the Education Code. It provides that no school fee may be imposed and collected on a greenhouse or other space covered or enclosed for agricultural purposes unless the school district has made findings supported by substantial evidence as follows:

1. The amount of the fees bears a reasonable relationship and is limited to the needs for school facilities created by the greenhouse or other space covered or enclosed for agricultural purposes.
2. The amount of the fee does not exceed the estimated reasonable costs of the school facilities necessitated by the structures as to which the fees are to be collected.
3. In determining the amount of the fees, the school district shall consider the relationship between the proposed increase in the number of employees, if any, the size and specific use of the structure, as well as the cost of construction.

In order to levy developer fees, a study is required to assess the impact of new growth and the ability of the local school district to accommodate that growth. The need for new school construction and modernization must be determined along with the costs involved. The sources of revenue need to be evaluated to determine if the district can fund the new construction and modernization. Finally, a relationship between needs and funding raised by the fee must be quantified.

Assembly Bill 181 (Chapter 1109/Statutes of 1989), which became effective October 2, 1989, was enacted to clarify several areas of developer fee law. Assembly Bill 181 provisions include the following:

1. Exempts residential remodels of less than 500 square feet from fees.
2. Prohibits the use of developer fee revenue for routine maintenance and repair, most asbestos work, and deferred maintenance.
3. Allows the fees to be used to pay for the cost of performing developer fee justification studies.
4. States that fees are to be collected at the time of occupancy unless the district can justify earlier collection. The fees can be collected at the time the building permit is issued if the district has established a developer fee account and funds have been appropriated for which the district has adopted a proposed construction schedule or plan prior to the issuance of the certificate of occupancy.
5. Clarifies that the establishment or increase of fees is not subject to the California Environmental Quality Act.
6. Clarifies that the impact of commercial/industrial development may be analyzed by categories of development as well as an individual project-by-project basis. An appeal process for individual projects would be required if analysis was done by categories.
7. Changes the frequency of the annual inflation adjustment on the Level I fee to every two years.
8. Exempts from fees - development used exclusively for religious purposes, private schools, and government-owned development.
9. Expands the definition of senior housing, which is limited to the commercial/industrial fee and requires the conversion from senior housing to be approved by the city/county after notification of the school district.

10. Extends the commercial/industrial fee to mobile home parks limited to older persons.

SECTION III: REQUIREMENTS OF AB 1600

Assembly Bill 1600 (Chapter 927/Statutes of 1987) adds Section 66000 through 66003 to the Government Code:

Section 66000 defines various terms used in AB 1600:

"Fee" is defined as monetary exaction (except a tax or a special assessment) which is charged by a local agency to the applicant in connection with the approval of a development project for the purpose of defraying all or a portion of the costs of public facilities related to the development project.

"Development project" is defined broadly to mean any project undertaken for purposes of development. This would include residential and commercial/industrial projects.

"Public facilities" is defined to include public improvements, public services, and community amenities.

Section 66001 (a) sets forth the requirements for establishing, increasing, or imposing fees. Local agencies are required to do the following:

1. Identify the purpose of the fee.
2. Identify the use to which the fee is to be put.
3. Determine how there is a reasonable relationship between the fee's use and the type of development project on which the fee is imposed.
4. Determine how there is a reasonable relationship between the need for the public facility and the type of development project on which the fee is imposed.

Section 66001 (c) requires that any fee subject to AB 1600 be deposited in an account established pursuant to Government Code Section 66006. Section 66006 requires that development fees be deposited in a capital facilities account or fund. To avoid any commingling of the fees with other revenues and funds of the local agency, the fees can only be expended for the purpose for which they were collected. Any income earned on the fees should be deposited in the account and expended only for the purposes for which the fee was collected.

Section 66001 (d) as amended by Senate Bill 1693 (Monteith/Statutes of 1996, Chapter 569), requires that for the fifth year following the first deposit into a developer fee fund, and for every five years thereafter, a school district must make certain findings as to such funds. These findings are required regardless of whether the funds are committed or uncommitted. Formerly, only remaining unexpended or uncommitted fees were subject to the mandatory findings and potential refund process. Under this section as amended, relating to unexpended fee revenue, two specific findings must be made as a part of the public information required to be formulated and made available to the public. These findings are:

1. Identification of all sources and amounts of funding anticipated to provide adequate revenue to complete any incomplete improvements identified pursuant to the requirements of Section 66001 (a)(2).
2. A designation of the approximate date upon which the anticipated funding will be received by the school district to complete the identified but as yet, incomplete improvements.

If the two findings are not made, a school district must refund the developer fee revenue on account in the manner provided in Section 66001 (e).

Section 66001 (e) provides that the local agency shall refund to the current record owners of the development project or projects on a prorated basis the unexpended or uncommitted portion of the fees and any accrued interest for which the local agency is unable to make the findings required by Section 66001 (d) that it still needs the fees.

Section 66002 provides that any local agency which levies a development fee subject to Section 66001 may adopt a capital improvement plan which shall be updated annually, and which shall indicate the approximate location, size, time of availability and estimates of cost for all facilities or improvements to be financed by the fees.

Assembly Bill 1600 and the Justification for Levying Developer Fees

Effective January 1, 1989, Assembly Bill 1600 requires that any school district which establishes, increases, or imposes a fee as a condition of approval of development shall make specific findings as follows:

1. A cost nexus must be established. A cost nexus means that the amount of the fee cannot exceed the cost of providing adequate school facilities for students generated by development. Essentially, it prohibits a school district from charging a fee greater than their cost to construct or modernize facilities for use by students generated by development.
2. A benefit nexus must be established. A benefit nexus is established if the fee is used to construct or modernize school facilities benefiting students to be generated from development projects.
3. A burden nexus must be established. A burden nexus is established if a project, by the generation of students, creates a need for additional facilities or a need to modernize existing facilities.

SECTION IV: REVENUE SOURCES FOR FUNDING FACILITIES

Two general sources exist for funding facility construction and modernization - state sources and local sources. The District has considered the following available sources:

State Sources

State School Facility Program

Senate Bill 50 reformed the State School Building Lease-Purchase Program in August of 1998. The new program, entitled the School Facility Program, provides funding under a “grant” program once a school district establishes eligibility. Funding required

from districts will be a 50/50 match for construction projects and 60/40 (District/State) match for modernization projects. Districts may levy the current statutory developer fee as long as a district can justify collecting that fee. If a district desires to collect more than the statutory fee (Level 2 or Level 3), that district must meet certain requirements outlined in the law, as well as conduct a needs assessment to enable a higher fee to be calculated.

The District is in the process of pursuing State facility funds.

Local Sources

Mello-Roos Community Facilities Act

The Mello-Roos Community Facilities Act of 1982 allows school districts to establish a community facilities district in order to impose a special tax to raise funds to finance the construction of school facilities.

1. The voter approved tax levy requires a two-thirds vote by the voters of the proposed Mello-Roos district.
2. If a Mello-Roos district is established in an area in which fewer than twelve registered voters reside, the property owners may elect to establish a Mello-Roos district.

General Obligation Bonds

General Obligation (GO) bonds may be issued by any school district for the purposes of purchasing real property or constructing or purchasing buildings or equipment "of a permanent nature." Because GO bonds are secured by an ad valorem tax levied on all taxable property in the district, their issuance is subject to two-thirds voter approval or 55% majority vote under Proposition 39 in an election. School districts are obligated, in the event of delinquent payments on the part of the property owners, to raise the amount of tax levied against the non-delinquent properties to a level sufficient to pay the principal and interest coming due on the bonds.

The District passed a bond in 2014 in the amount of \$175 million and one in 2022 in the amount of \$398 million. Bond funds have been expended or are encumbered for

the District's current facility needs. In addition, district needs exceed available bond funds as referenced in the 2022 Facility Master Plan Update.

Developer Fees

The District's developer fees are dedicated to the current needs related directly to modernization and replacement of school facilities.

School District General Funds

The District's general funds are needed by the District to provide for the operation of its instructional program.

Expenditure of Lottery Funds

Government Code Section 8880.5 states: "It is the intent of this chapter that all funds allocated from the California State Lottery Education Fund shall be used exclusively for the education of pupils and students, and no funds shall be spent for acquisition of real property, construction of facilities, financing research, or any other non-instructional purpose."

SECTION V: ESTABLISHING THE COST, BENEFIT AND BURDEN NEXUS

In accordance with Government Code Section 66001, the District has established a cost nexus and identified the purpose of the fee, established a benefit nexus, and a burden nexus:

Establishment of a Cost Nexus & Identify Purpose of the Fee

The Santa Rosa High School District chooses to replace and/or modernize facilities for the additional students created by development in the district and the cost to replace and/or modernize facilities exceeds the amount of developer fees to be collected. It is clear that when educational facilities are provided for students generated by new residential, and commercial/industrial development, the cost of replacing and/or

modernizing facilities exceeds developer fee generation, thereby establishing a cost nexus.

Establishment of a Benefit Nexus

Students generated by new residential and commercial/industrial development will be attending District schools. Housing District students in replaced and/or modernized facilities will directly benefit those students from the new development projects upon which the fee is imposed, therefore, a benefit nexus is established.

Establishment of a Burden Nexus

Future residential and commercial/industrial development will cause new families to move into the District and, consequently, will generate additional students in the District. While facilities are currently designed to meet the projected student enrollment, the existing facilities will need to remain in sufficient condition to maintain existing levels of service for the newly generated students. Future residential and commercial/industrial development, therefore, creates a need for the reconstruction and/or modernization of existing school facilities. The fee's use for school facility reconstruction and/or modernization efforts is, therefore, reasonably related to the future residential and commercial/industrial development upon which it is imposed.

The need for reconstructing and/or modernizing facilities will be, in part, satisfied by the levying of developer fees on new residential and commercial/industrial developments, therefore, a burden nexus is established.

SECTION VI: FACILITY FUNDING ALTERNATIVES

The District does not currently have funds to provide for the shortfall in modernization costs. We suggest the District continue to consider and pursue all State funding sources for the modernization of facilities.

STATEMENT TO IDENTIFY PURPOSE OF FEE

It is a requirement of AB 1600 that the District identify the purpose of the fee. The purpose of fees being levied shall be used for the replacement and/or modernization of school facilities. The District will provide for the replacement and/or modernization of school facilities, in part, with developer fees. Developer fees may not be used for regular maintenance, routine repair of school buildings and facilities, or deferred maintenance. Projects included in the 2022 \$125 million bond exceed available bond funds. Developer fees will be used to assist with projects including, but not limited to roofing, plumbing, heating, cooling, dry rot repair, and infrastructure improvements. Facility upgrades are necessary to provide adequate housing to students generated from new development. The District's 2016, 2022, and 2023 Facility Master Plans provide examples of the types of projects that can be funded by the developer fees and a summary of facility needs and costs. In addition to modernization and reconstruction needs, the District may have the need in the future to increase capacity as residential units are constructed. Projects will be funded as developer fee revenue is generated.

ESTABLISHMENT OF A SPECIAL ACCOUNT

Pursuant to Government Code section 66006, the District has established a special account in which fees for capital facilities are deposited. The fees collected in this account will be expended only for the purpose for which they were collected. Any interest income earned on the fees that are deposited in such an account must remain with the principal. The school district must make specific information available to the public within 180 days of the end of each fiscal year pertaining to each developer fee fund. The information required to be made available to the public by Section 66006 (b) (1) was amended by SB 1693 and includes specific information on fees expended and refunds made during the year.

RECOMMENDATION

Based on the fee justification provided in this report, it is recommended that the Santa Rosa High School District levy residential development fees and commercial/industrial fees up to the statutory fee for which justification has been determined.

SOURCES

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APPENDIX A
CONSTRUCTION COSTS

**Santa Rosa High School District
Per Pupil Construction Costs**

Grade Level	Square Feet Per Pupil*	Cost Per Square Foot**	Construction Cost	Soft Costs (25%)	Total
7-8	85	\$ 975	\$ 82,875	\$ 20,719	\$103,594
9-12	92	\$ 975	\$ 89,700	\$ 22,425	\$112,125

**source: California Department of Education*

***source: Quattrocchi Kwok Architects*

APPENDIX B
PER PUPIL GRANT AMOUNTS

ATTACHMENT B

ANNUAL ADJUSTMENT TO SCHOOL FACILITY PROGRAM GRANTS

State Allocation Board Meeting, January 24, 2024

Grant Amount Adjustments

New Construction	SFP Regulation Section	Adjusted Grant Per Pupil Effective 1-1-23	Adjusted Grant Per Pupil Effective 1-1-24
Elementary	1859.71	\$15,983	\$15,770
Middle	1859.71	\$16,904	\$16,679
High	1859.71	\$21,509	\$21,223
Special Day Class – Severe	1859.71.1	\$44,911	\$44,314
Special Day Class – Non-Severe	1859.71.1	\$30,036	\$29,637
Automatic Fire Detection/Alarm System – Elementary	1859.71.2	\$19	\$19
Automatic Fire Detection/Alarm System – Middle	1859.71.2	\$25	\$25
Automatic Fire Detection/Alarm System – High	1859.71.2	\$43	\$42
Automatic Fire Detection/Alarm System – Special Day Class – Severe	1859.71.2	\$80	\$79
Automatic Fire Detection/Alarm System – Special Day Class – Non-Severe	1859.71.2	\$57	\$56
Automatic Sprinkler System – Elementary	1859.71.2	\$268	\$264
Automatic Sprinkler System – Middle	1859.71.2	\$319	\$315
Automatic Sprinkler System – High	1859.71.2	\$331	\$327
Automatic Sprinkler System – Special Day Class – Severe	1859.71.2	\$846	\$835
Automatic Sprinkler System – Special Day Class – Non-Severe	1859.71.2	\$567	\$559

ATTACHMENT B

ANNUAL ADJUSTMENT TO SCHOOL FACILITY PROGRAM GRANTS

State Allocation Board Meeting, January 24, 2024

Grant Amount Adjustments

Modernization	SFP Regulation Section	Adjusted Grant Per Pupil Effective 1-1-23	Adjusted Grant Per Pupil Effective 1-1-24
Elementary	1859.78	\$6,086	\$6,005
Middle	1859.78	\$6,436	\$6,350
High	1859.78	\$8,427	\$8,315
Special Day Class - Severe	1859.78.3	\$19,396	\$19,138
Special Day Class – Non-Severe	1859.78.3	\$12,977	\$12,804
State Special School – Severe	1859.78	\$32,330	\$31,900
Automatic Fire Detection/Alarm System – Elementary	1859.78.4	\$198	\$195
Automatic Fire Detection/Alarm System – Middle	1859.78.4	\$198	\$195
Automatic Fire Detection/Alarm System – High	1859.78.4	\$198	\$195
Automatic Fire Detection/Alarm System – Special Day Class – Severe	1859.78.4	\$544	\$537
Automatic Fire Detection/Alarm System – Special Day Class – Non-Severe	1859.78.4	\$365	\$360
Over 50 Years Old – Elementary	1859.78.6	\$8,454	\$8,342
Over 50 Years Old – Middle	1859.78.6	\$8,942	\$8,823
Over 50 Years Old – High	1859.78.6	\$11,705	\$11,549
Over 50 Years Old – Special Day Class – Severe	1859.78.6	\$26,948	\$26,590
Over 50 Years Old – Special Day Class – Non-Severe	1859.78.6	\$18,019	\$17,779
Over 50 Years Old – State Special Day School – Severe	1859.78.6	\$44,910	\$44,313

APPENDIX C

**COMMERCIAL/INDUSTRIAL
CALCULATIONS**

Santa Rosa High School District						
Commercial/Industrial Calculations						
	EMP/ 1000 SQ.FT	DIST.HH/ EMP	HH/SF	% EMP IN EXIST HH	ADJUSTED HH/SF	ADJ % DIST HH/EMP
MEDICAL	4.27	0.2	0.000854	0.553	0.000472262	0.1106
CORP. OFFICE	2.68	0.2	0.000536	0.553	0.000296408	0.1106
COM. OFFICE	4.78	0.2	0.000956	0.553	0.000528668	0.1106
LODGING	1.55	0.3	0.000465	0.553	0.0002571	0.1659
R&D	3.04	0.2	0.000608	0.553	0.000336224	0.1106
IN. PARK	1.68	0.2	0.000336	0.553	0.000185808	0.1106
IN/COM PARK	2.21	0.2	0.000442	0.553	0.000244426	0.1106
NBHD COMM SC	3.62	0.3	0.001086	0.553	0.000600558	0.1659
COMMUNITY SC	1.09	0.3	0.000327	0.553	0.000180831	0.1659
BANKS	2.82	0.3	0.000846	0.553	0.000467838	0.1659
MINI-STORAGE	0.06	0.2	0.000012	0.553	0.000006636	0.1106
AGRICULTURE	0.31	0.5	0.000155	0.553	0.0000857	0.28
STUDENT GENERATION RATE						
MODERNIZATION COST PER STUDENT						
(weighted Student Generation Calculations attached)						
7-12	0.1080			\$46,117		
STUDENTS PER SQUARE FOOT						
(YIELD FACTORS X ADJ HH/SQ. FT IN COLUMN F)						
	7-12					
MEDICAL	0.000051					
CORP. OFFICE	0.000032					
COM. OFFICE	0.000057					
LODGING	0.000028					
R&D	0.000036					
IN. PARK	0.000020					
IN/COM PARK	0.000026					
COM. SC.	0.000065					
COMMUNITY SC	0.000020					
BANKS	0.000051					
MINI STORAGE	0.000001					
AGRICULTURE	0.000009					
COSTS PER SQUARE FOOT						
(STUDENTS/ SQ. FOOT X STUDENT COST/SQ. FOOT IN EACH CATEGORY)						
	7-12					
MEDICAL	\$2.35					
CORP. OFFICE	\$1.48					
COM. OFFICE	\$2.63					
LODGING	\$1.28					
R&D	\$1.67					
IN. PARK	\$0.93					
IN/COM PARK	\$1.22					
COM. SC.	\$2.99					
COMMUNITY SC	\$0.90					
BANKS	\$2.33					
MINI STORAGE	\$0.03					
AGRICULTURE	\$0.43					

**Santa Rosa High School District
Weighted Student Generation Rate**

Projected 7-12 Students

Housing Type	Projected Units	SGR	Projected Students
SF	5848	0.066	386
SFA	808	0.076	61
MF	9290	0.035	325
AFF	3266	0.399	1303
Total	19212		2075

Weighted Student Generation Rate

Projected Residential Units	Projected Students	Weighted Student Generation Rate
19212	2075	0.108

APPENDIX D

DEVELOPMENT SUMMARY

Santa Rosa High School District--Projected Development

School District	TOTAL HU						Delta HU		
	SF19	MF19	SH19	2019	SF40	MF40	SH40	2019 - 2040	
Santa Rosa High	58,050	25,725	7,322	91,097	65,096	37,891	7,546	110,533	19,436

Extracted from the Sonoma County Travel Model 2-7-2022 (4 Traffic Analysis Zones)

Key:

- SF *Single Family Housing Units*
- MF *Multifamily Housing Units*
- SH *Senior/Group Housing Units*
- HU *Housing Units*
- 19 *2019*
- 40 *2040*

Unit Type	Projected Units*
Single Family Detached	5,848
Single Family Attached	808
Multi Family	9,290
Affordable	3,266
Total	19,212

** Source: Projected unit types based on City of Santa Rosa recent construction data.*

RESOLUTION NO. 2023/24-35 (April 24, 2024, Regular Meeting)
A RESOLUTION OF THE GOVERNING BOARD OF THE
SANTA ROSA ELEMENTARY SCHOOL DISTRICT
INCREASING SCHOOL FACILITIES FEES AS AUTHORIZED BY
GOVERNMENT CODE SECTION 65995 (b) 3

WHEREAS, Statute AB 2926 (Chapter 887/Statutes of 1986) authorizes the governing board of any school district to levy a fee, charge, dedication or other form of requirement against any development project for the reconstruction of school facilities; and,

WHEREAS, Government Code Section 65995 establishes a maximum amount of fee that may be charged against such development projects and authorizes the maximum amount set forth in said section to be adjusted for inflation every two years as set forth in the state-wide cost index for Class B construction as determined by the State Allocation Board at its January meeting; and,

WHEREAS, at its January 24, 2024, meeting, the State Allocation Board approved the maximum fee authorized by Education Code Section 17620 to \$5.17 per square foot of residential construction described in Government Code Section 65995(b)(1) and \$0.84 per square foot against commercial/industrial construction described in Government Code Section 65995(b)(2); and,

WHEREAS, The Santa Rosa Elementary School District shares developer fees with Santa Rosa High School District. The High School District collects 30 percent of the Level I Fee and the Santa Rosa Elementary School District collects 70 percent of the Level I Fee; and,

WHEREAS, the Santa Rosa Elementary School District's portion of the current Level I residential statutory fee is \$3.62 (70% of \$5.17) per square foot of construction. However, the Level I fee calculations justify a residential fee of \$2.74. Therefore, the District is justified to collect \$2.74 per square foot of residential construction; and,

WHEREAS, the purpose of this Resolution is to approve and adopt fees on residential projects in the amount of \$2.74 per square foot as authorized by Education Code Section 17620; and,

WHEREAS, the purpose of this Resolution is to approve and adopt fees on commercial/industrial development projects ranging from \$0.02 to \$0.59 (70 percent of \$0.84) per square foot depending on the category of construction as described in Government Code Section 65995(b)(2).

NOW, THEREFORE, BE IT HEREBY RESOLVED by the Governing Board of the Santa Rosa Elementary School District as follows:

1. Procedure. This Board hereby finds that prior to the adoption of this Resolution, the Board conducted a public hearing at which oral and written presentations were made, as part of the Board's regularly scheduled February 28, 2024, meeting. Notice of the time and place of the meeting, including a general explanation of the matter to be considered, has been published twice in a newspaper in accordance with Government Code Section 66016, and a notice, including a statement that the data required by Government Code Section 66016 was available, was mailed at least 14 days prior to the meeting to any interested party who had filed a written request with the District for mailed notice of the meeting on new fees or service charges within the period specified by law. Additionally, at least 10 days prior to the meeting, the District made available to the public, data indicating the amount of the cost, or estimated cost, required to provide the service for which the fee or service charge is to be adjusted pursuant to this Resolution, and the revenue sources anticipated to provide this service. By way of such public meeting, the Board received oral and written presentations by District staff which are summarized and contained in the District's Developer Fee Implementation Study dated January 31, 2024, (hereinafter referred to as the "Plan") and which formed the basis for the action taken pursuant to this Resolution.

2. Findings. The Board has reviewed the Plan as it relates to proposed and potential development, the resulting school facilities needs, the cost thereof, and the available sources of revenue including the fees provided by this Resolution, and based thereon and upon all other written and oral presentations to the Board, hereby makes the following findings:
 - A. Additional development projects within the District, whether new residential construction or residential reconstruction involving increases in assessable area greater than 500 square feet, or new commercial or industrial construction will increase the need for reconstruction of school facilities.
 - B. Without reconstruction of present school facilities, any further residential development projects or commercial or industrial development projects within the District will result in a significant decrease in the quality of education presently offered by the District;
 - C. The fees proposed in the Plan and the fees implemented pursuant to this Resolution are for the purposes of providing adequate school facilities to maintain the quality of education offered by the District;
 - D. The fees proposed in the Plan and implemented pursuant to this Resolution will be used for the reconstruction of school facilities as identified in the Plan;
 - E. The uses of the fees proposed in the Plan and implemented pursuant to this Resolution are reasonably related to the types of development projects on which the fees are imposed;
 - F. The fees proposed in the Plan and implemented pursuant to this Resolution bear a reasonable relationship to the need for reconstructed school facilities created by the types of development projects on which the fees are imposed;
 - G. The fees proposed in the Plan and implemented pursuant to this Resolution do not exceed the estimated amount required to provide funding for the reconstruction of school facilities for which the fees are levied; and in making this finding, the Board declares that it has considered the availability of revenue sources anticipated to provide such facilities, including general fund revenues;
 - H. The fees imposed on commercial or industrial development bear a reasonable relationship and are limited to the needs of the community for schools and are reasonably related and limited to the need for reconstructed school facilities caused by the development;
 - I. The fees will be collected for school facilities for which an account has been established and funds appropriated and for which the district has adopted a reconstruction schedule and/or to reimburse the District for expenditures previously made.
3. Fee. Based upon the foregoing findings, the Board hereby adjusts the previously levied fee to the amount of \$2.74 per square foot for assessable space for new residential construction and for residential reconstruction to the extent of the resulting increase in assessable areas; and to the amount ranging from \$0.02 to \$0.59 (70 percent of \$0.84) per square foot depending on the category of construction for new commercial/industrial construction.
4. Fee Adjustments and Limitation. The fees adjusted herewith shall be subject to the following:
 - A. The amount of the District's fees as authorized by Education Code Section 17620 shall be reviewed every two years to determine if a fee increase according to the adjustment for inflation set forth in the statewide cost index for Class B construction as determined by the State Allocation Board is justified.

- B. Any development project for which a final map was approved, and construction had commenced on or before September 1, 1986, is subject only to the fee, charge, dedication or other form of requirement in existence on that date and applicable to the project.
- C. The term "development project" as used herein is as defined by Section 65928 of the Government Code.
5. Additional Mitigation Methods. The policies set forth in this Resolution are not exclusive and the Board reserves the authority to undertake other or additional methods to finance school facilities including but not limited to the Mello-Roos Community Facilities Act of 1982 (Government Code Section 53311, et seq.) and such other funding mechanisms. This Board reserves the authority to substitute the dedication of land or other property or other form of requirement in lieu of the fees levied by way of this Resolution at its discretion, so long as the reasonable value of land to be dedicated does not exceed the maximum fee amounts contained herein or modified pursuant hereto.
 6. Implementation. For residential and commercial/industrial projects within the District, the Superintendent, or the Superintendent's designee, is authorized to issue Certificates of Compliance upon the payment of any fee levied under the authority of this Resolution.
 7. California Environmental Quality Act. The Board hereby finds that the implementation of Developer Fees is exempt from the California Environmental Quality Act (CEQA).
 8. Commencement Date. The effective date of this Resolution shall be June 24, 2024, which is 60 days following its adoption by the Board.
 9. Notification of Local Agencies. The Secretary of the Board is hereby directed to forward copies of this Resolution and a Map of the District to the Planning Commission and Board of Supervisors of Sonoma County and to the Planning Commission and City Council of the City of Santa Rosa.
 10. Severability. If any portion of this Resolution is found by a Court of competent jurisdiction to be invalid, such finding shall not affect the validity of the remaining portions of this Resolution. The Board hereby declares its intent to adopt this Resolution irrespective of the fact that one or more of its provisions may be declared invalid subsequent hereto.

APPROVED, PASSED and ADOPTED by the Governing Board of the Santa Rosa Elementary School District this 24 day of April, 2024, by the following vote:

AYES: 5

NOES: 0

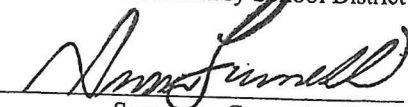
ABSENT: 2

ABSTAIN: 0

ATTEST 0



President, Governing Board
Santa Rosa Elementary School District



Secretary, Governing Board
Santa Rosa Elementary School District

RESOLUTION NO. 2023/24-36 (April 24, 2024, Regular Meeting)
A RESOLUTION OF THE GOVERNING BOARD OF THE
SANTA ROSA HIGH SCHOOL DISTRICT
INCREASING SCHOOL FACILITIES FEES AS AUTHORIZED BY
GOVERNMENT CODE SECTION 65995 (b) 3

WHEREAS, Statute AB 2926 (Chapter 887/Statutes of 1986) authorizes the governing board of any school district to levy a fee, charge, dedication or other form of requirement against any development project for the reconstruction of school facilities; and,

WHEREAS, Government Code Section 65995 establishes a maximum amount of fee that may be charged against such development projects and authorizes the maximum amount set forth in said section to be adjusted for inflation every two years as set forth in the state-wide cost index for Class B construction as determined by the State Allocation Board at its January meeting; and,

WHEREAS, at its January 24, 2024, meeting, the State Allocation Board approved the maximum fee authorized by Education Code Section 17620 to \$5.17 per square foot of residential construction described in Government Code Section 65995(b)(1) and \$0.84 per square foot against commercial/industrial construction described in Government Code Section 65995(b)(2); and,

WHEREAS, The Santa Rosa High School District shares developer fees with its feeder districts. The feeder districts collect 70 percent of the Level I Fee and the Santa Rosa High School District collects 30 percent of the Level I Fee.

WHEREAS, if the feeder districts choose to collect no fees or less than their share of \$5.17, the Santa Rosa High School District may collect their portion of the fee up to \$5.17. Fees collected between the two districts may not exceed the Level I statutory fee of \$5.17.

WHEREAS, the purpose of this Resolution is to approve and adopt fees on residential projects in the amount of \$1.55 (30 percent of \$5.17) per square foot as authorized by Education Code Section 17620; and,

WHEREAS, the purpose of this Resolution is to approve and adopt fees on commercial/industrial development projects in the amount of \$0.25 (30 percent of \$0.84) per square foot as described in Government Code Section 65995(b)(2). The mini-storage category of commercial/industrial justification has less impact than the statutory \$0.84 per square foot commercial/industrial justification and should be collected at the justified rate of \$0.03 per square foot.

NOW, THEREFORE, BE IT HEREBY RESOLVED by the Governing Board of the Santa Rosa High School District as follows:

1. Procedure. This Board hereby finds that prior to the adoption of this Resolution, the Board conducted a public hearing at which oral and written presentations were made, as part of the Board's regularly scheduled February 28, 2024, meeting. Notice of the time and place of the meeting, including a general explanation of the matter to be considered, has been published twice in a newspaper in accordance with Government Code Section 66016, and a notice, including a statement that the data required by Government Code Section 66016 was available, was mailed at least 14 days prior to the meeting to any interested party who had filed a written request with the District for mailed notice of the meeting on new fees or service charges within the period specified by law. Additionally, at least 10 days prior to the meeting, the District made available to the public, data indicating the amount of the cost, or estimated cost, required to provide the service for which the fee or service charge is to be adjusted pursuant to this Resolution, and the revenue sources anticipated to provide this service. By way of such public meeting, the Board received oral and written presentations by District staff which are summarized and contained

in the District's Developer Fee Implementation Study dated January 30, 2024, (hereinafter referred to as the "Plan") and which formed the basis for the action taken pursuant to this Resolution.

2. Findings. The Board has reviewed the Plan as it relates to proposed and potential development, the resulting school facilities needs, the cost thereof, and the available sources of revenue including the fees provided by this Resolution, and based thereon and upon all other written and oral presentations to the Board, hereby makes the following findings:
 - A. Additional development projects within the District, whether new residential construction or residential reconstruction involving increases in assessable area greater than 500 square feet, or new commercial or industrial construction will increase the need for reconstruction of school facilities.
 - B. Without reconstruction of present school facilities, any further residential development projects or commercial or industrial development projects within the District will result in a significant decrease in the quality of education presently offered by the District;
 - C. The fees proposed in the Plan and the fees implemented pursuant to this Resolution are for the purposes of providing adequate school facilities to maintain the quality of education offered by the District;
 - D. The fees proposed in the Plan and implemented pursuant to this Resolution will be used for the reconstruction of school facilities as identified in the Plan;
 - E. The uses of the fees proposed in the Plan and implemented pursuant to this Resolution are reasonably related to the types of development projects on which the fees are imposed;
 - F. The fees proposed in the Plan and implemented pursuant to this Resolution bear a reasonable relationship to the need for reconstructed school facilities created by the types of development projects on which the fees are imposed;
 - G. The fees proposed in the Plan and implemented pursuant to this Resolution do not exceed the estimated amount required to provide funding for the reconstruction of school facilities for which the fees are levied; and in making this finding, the Board declares that it has considered the availability of revenue sources anticipated to provide such facilities, including general fund revenues;
 - H. The fees imposed on commercial or industrial development bear a reasonable relationship and are limited to the needs of the community for schools and are reasonably related and limited to the need for reconstructed school facilities caused by the development;
 - I. The fees will be collected for school facilities for which an account has been established and funds appropriated and for which the district has adopted a reconstruction schedule and/or to reimburse the District for expenditures previously made.
3. Fee. Based upon the foregoing findings, the Board hereby increases the previously levied fee to the amount of \$1.55 (30 percent of \$5.17) per square foot for assessable space for new residential construction and for residential reconstruction to the extent of the resulting increase in assessable areas; and to the amount of \$0.25 (30 percent of \$0.84) per square foot for new commercial/industrial construction. The mini-storage category of commercial/industrial justification has less impact than the statutory \$0.84 per square foot commercial/industrial justification and should be collected at the justified rate of \$0.03 per square foot.
4. Fee Adjustments and Limitation. The fees adjusted herewith shall be subject to the following:
 - A. The amount of the District's fees as authorized by Education Code Section 17620 shall be reviewed every two years to determine if a fee increase according to the adjustment for inflation set forth in

the statewide cost index for Class B construction as determined by the State Allocation Board is justified.

- B. Any development project for which a final map was approved, and construction had commenced on or before September 1, 1986, is subject only to the fee, charge, dedication or other form of requirement in existence on that date and applicable to the project.
- C. The term "development project" as used herein is as defined by Section 65928 of the Government Code.
- 5. Additional Mitigation Methods. The policies set forth in this Resolution are not exclusive and the Board reserves the authority to undertake other or additional methods to finance school facilities including but not limited to the Mello-Roos Community Facilities Act of 1982 (Government Code Section 53311, et seq.) and such other funding mechanisms. This Board reserves the authority to substitute the dedication of land or other property or other form of requirement in lieu of the fees levied by way of this Resolution at its discretion, so long as the reasonable value of land to be dedicated does not exceed the maximum fee amounts contained herein or modified pursuant hereto.
- 6. Implementation. For residential and commercial/industrial projects within the District, the Superintendent, or the Superintendent's designee, is authorized to issue Certificates of Compliance upon the payment of any fee levied under the authority of this Resolution.
- 7. California Environmental Quality Act. The Board hereby finds that the implementation of Developer Fees is exempt from the California Environmental Quality Act (CEQA).
- 8. Commencement Date. The effective date of this Resolution shall be June 24, 2024 which is 60 days following its adoption by the Board.
- 9. Notification of Local Agencies. The Secretary of the Board is hereby directed to forward copies of this Resolution and a Map of the District to the Planning Commission and Board of Supervisors of Sonoma County and to the Planning Commission and City Council of the City of Santa Rosa.
- 10. Severability. If any portion of this Resolution is found by a Court of competent jurisdiction to be invalid, such finding shall not affect the validity of the remaining portions of this Resolution. The Board hereby declares its intent to adopt this Resolution irrespective of the fact that one or more of its provisions may be declared invalid subsequent hereto.

APPROVED, PASSED and ADOPTED by the Governing Board of the Santa Rosa High School District this 24 day of April, 2024, by the following vote:

AYES: 5

NOES: 0

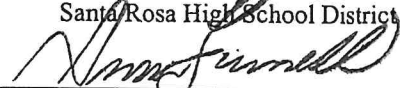
ABSENT: 2

ABSTAIN: 0

ATTEST: 0



President, Governing Board
Santa Rosa High School District



Secretary, Governing Board
Santa Rosa High School District



Resolution No. 2023/24-61
Date: April 24, 2024

Resolution Recognizing Classified School Employee Week

WHEREAS, the third full week in May has traditionally been designated as Classified School Employees' Week in California by the California School Employees Association and the California State Legislature.

WHEREAS, education is the most vital activity we as a society undertake to ensure the well-being of the nation; and

WHEREAS, Classified School Employees provide valuable services to the schools and students of the Santa Rosa City Schools; and

WHEREAS, Classified School Employees contribute to the establishment and promotion of a positive instructional environment; and

WHEREAS, Classified School Employees play a vital role in providing for the welfare and safety of students; and

WHEREAS, Classified School Employees strive for excellence in all areas relative to the educational community;

NOW THEREFORE, BE IT RESOLVED, that the Santa Rosa City Schools Board of Education expresses its gratitude and commends all classified employees for their services and joins the California State Legislature in designating the week of May 19-25, 2024 as "Classified School Employee Week."

PASSED AND ADOPTED by the Governing Board of the Santa Rosa City Schools District on the 24th day of April, 2024.

Roxanne McNally, Clerk

April 24, 2024

Date



Resolution Recognizing Teacher Appreciation Week (May 6-10, 2024)

WHEREAS, the goal of Teacher Appreciation Week is to raise national and local awareness of teaching excellence in building a better society; and

WHEREAS, education is a grand and powerful profession, worthy to be honored and respected; and

WHEREAS, excellence in education begins in the classrooms of our nation's schools. SRCS teachers are among the professional educators who are charged with the responsibility of helping to shape the destiny of our country by training and guiding our children, youth and adults; and

WHEREAS, SRCS teachers are and will continue to be a dynamic force in the educational process. They have demonstrated, through their sense of purpose and dedication to their profession, that they are a major source of inspiration to our students; and

WHEREAS, SRCS teachers have consistently documented their professional competence and commitment to students through their willingness to give of their time, energy, talents and ideas. They are to be praised for the progress our students are making; and

WHEREAS, SRCS teachers should be deeply respected and highly recognized for the contributions they have made to our county, our state, and our nation; and

WHEREAS, SRCS teachers encounter students of widely differing backgrounds and support them all equitably, with compassion; and

WHEREAS, SRCS teachers are responsible for educating and encouraging students to become the next generation of inventors, entrepreneurs, public officials, first responders, professionals, and service providers so that our community continues to grow and flourish; and

WHEREAS, SRCS teachers help build the country's future by providing quality education to all students; and

WHEREAS, SCRS teachers, counselors, nurses, librarians, psychologists and speech and language pathologists and other certificated staff continue to contribute to the well-being of our local community and the entire state; and

NOW THEREFORE, BE IT RESOLVED, that the Santa Rosa City Schools Board of Education recognizes May 6-10, 2024, as Teacher Appreciation Week and urges all schools, centers, departments, parents, businesses, governmental and community agencies and the entire community to participate in the celebration of the significant role teachers play in shaping the lives of our students and the future of our great nation.

PASSED AND ADOPTED by the Governing Board of the Santa Rosa City Schools District on the 24th day of April, 2024.



Roxanne McNally, Clerk of the Board

April 24, 2024

Date



Resolution No. 2023/24-63

Date: April 24, 2024

Resolution Recognizing Guest Teacher Appreciation in May 2024

WHEREAS, guest teachers (formerly substitute teachers) are essential to the education of our children and deserve recognition and respect from the community; and,

WHEREAS, classroom teachers will on occasion be absent, we recognize the continuity guest teachers bring to our students' learning environment and educational agenda; and,

WHEREAS, maintaining the usual level of discipline and cohesiveness in the classroom is crucial to every student, and guest teachers face unique challenges and situations each time they must replace a classroom teacher; and,

WHEREAS, every guest teacher must be very flexible in order to adapt to different teaching styles and planning, as well as command the respect of the young people they may be teaching on a given day; and,

NOW, THEREFORE BE IT RESOLVED that the Santa Rosa City Schools Board of Education hereby recognizes Guest Teacher Appreciation in May 2024 and honors the valuable and meaningful contributions that Guest teachers offer the world of education on a daily basis.

PASSED AND ADOPTED at the regular meeting of the Governing Board of the Santa Rosa City Schools on April 24, 2024, by the following vote:

AYES: 5

NOES: 0

ABSENT: 2

ABSTAIN: 0

I hereby certify that the foregoing is a true and correct copy of a Resolution of the Governing Board of the Santa Rosa City Schools of Sonoma County, California, adopted by said Governing Board at its meeting on **April 24, 2024**.

Roxanne McNally,
Clerk, Board of Education, Santa Rosa City Schools



RESOLUTION NO. 2023/24-59

Date: April 24, 2024

RESOLUTION APPROVING LEASE-LEASEBACK CONTRACTS WITH ARNTZ BUILDERS, INC. FOR THE DISTRICT OFFICE AND EDUCATION CENTER- CENTRAL RECEIVING WAREHOUSE

WHEREAS, the Santa Rosa Elementary School District ("Elementary District") is a California public school district subject to the California Education Code;

WHEREAS, the Santa Rosa High School District ("High School District") is a California public school district subject to the California Education Code;

WHEREAS, the Elementary & High School Districts are governed by a common administration collectively referred to as Santa Rosa City Schools;

WHEREAS, the Elementary & High School Districts owns real property known as Santa Rosa District Office and Education Center, located at 211 Ridgway Avenue, Santa Rosa, California 95401 ("Site");

WHEREAS, the Elementary District & High School District desires to replace the existing warehouse with a new Central Receiving Warehouse & relocation of Data Center ("Project");

WHEREAS, the Elementary & High School District developed and issued a Request for Proposals ("RFP"), which sought proposals from prequalified entities to perform the work. The RFP provided detailed information regarding the Elementary & High School District's Project, and identified the criteria and methodology the District would consider in evaluating the proposals and qualifications of the proposers to determine which would provide the best value;

WHEREAS, the Elementary & High School District received proposals from contractors in response to its RFP. Based upon the information provided by the prospective contractors, the Elementary District evaluated the proposals to determine which contractor would provide the Elementary District with the best value, taking into consideration their demonstrated competence and professional qualifications necessary for the satisfactory performance of the services required for the Project;

WHEREAS, the Elementary & High School District has reviewed responses to the RFP and determined that Arntz Builders, Inc.'s ("Arntz") proposal will provide the best value for the Elementary & High School District, considering price, experience, safety record, and the other criteria identified in the RFP;

WHEREAS, the Elementary & High School District scored the proposals and determined that Arntz had the highest score and was the best value contractor; and

WHEREAS, the Elementary & High School District's staff and legal counsel, and Arntz have developed a mutually agreeable contract embodied in the Site Lease and the Facilities Lease now being presented.

NOW, THEREFORE, the Board of Education of the Santa Rosa City Schools does hereby resolve, determine, and order as follows:

Section 1. Recitals. All of the recitals above are true and correct.

Section 2. Determination and Basis for Award. Arntz proposal provides the best value to the Elementary & High School District, taking into consideration Arntz demonstrated competence and professional qualifications necessary for the satisfactory performance of the services required for the Project. This is the basis of the award.

Section 3. Best Interest Determination. The Site Lease and the Facilities Lease are in the best interest of the Elementary & High School District.

Section 4. Contract Approval. The Site Lease and Facilities Lease presented are hereby ratified and approved subject to any necessary revisions approved by staff and legal counsel.

Section 5. Authority to Execute. The Elementary & High School District's Superintendent, or her designee, is hereby authorized to execute and deliver the Site Lease and the Facilities Lease and take any other actions necessary to affect the intent of this resolution and begin work on the Project.


Section 6. Effective Date. The Resolution shall take effect upon adoption.

PASSED AND ADOPTED, by the Board of Education of the Santa Rosa City Schools on April 24, 2024, by the following vote:

YEAS: 5
NOES: 0
ABSENT: 2
ABSTAIN: 0



President
Board of Education, Santa Rosa City Schools

Attest: 

Clerk
Board of Education, Santa Rosa City Schools

Panorama, YouthTruth, Attendance, Discipline Patterns

April 24, 2024

Wellness & Engagement

Santa Rosa City Schools - MVP's

Mission

SRCS ensures equitable access to a transformative educational experience grounded in the assets of our students, staff, and community. We nurture the whole student in an engaging, challenging, and safe environment. We recognize and value each student's individuality and our community's cultural wealth.

Vision

SRCS will send students into the world empowered to find purpose, think critically, embrace diversity, work together, and adapt to our changing planet, and live healthy and fulfilling lives.



Santa Rosa City Schools - MVP's

Priorities

- Priority 1: Life Ready Learners
- Priority 2: Whole Person Focus
- Priority 3: High Quality Staff
- Priority 4: Teaching and Learning Environment and Resources
- Priority 5: Equity and Excellence
- Priority 6: Family Engagement and Community Partnerships
- Priority 7: Sustainable Funding

Introduction of Presenters

- Anna Trunnell, Superintendent
- Dr. Emanuele Bardelli, Executive Director, Information & Evaluation
- Stacy Desideri, Executive Director, Wellness & Engagement
- Eric Lofchie, Director, Wellness & Engagement
- Gustavo Mendoza, Coordinator, Wellness & Engagement

**Social-Emotional Wellness Survey
(Panorama)
and
Culture & Climate Survey
(YouthTruth)**

Stacy Desideri & Eric Lofchie LMFT



Panorama: RESPONSE RATES



1,602 4th-6th graders (92%)

7,522 7th-12th graders (85%)

.....



2,100 teacher surveys about K-3 students (89%)

.....



372 teachers

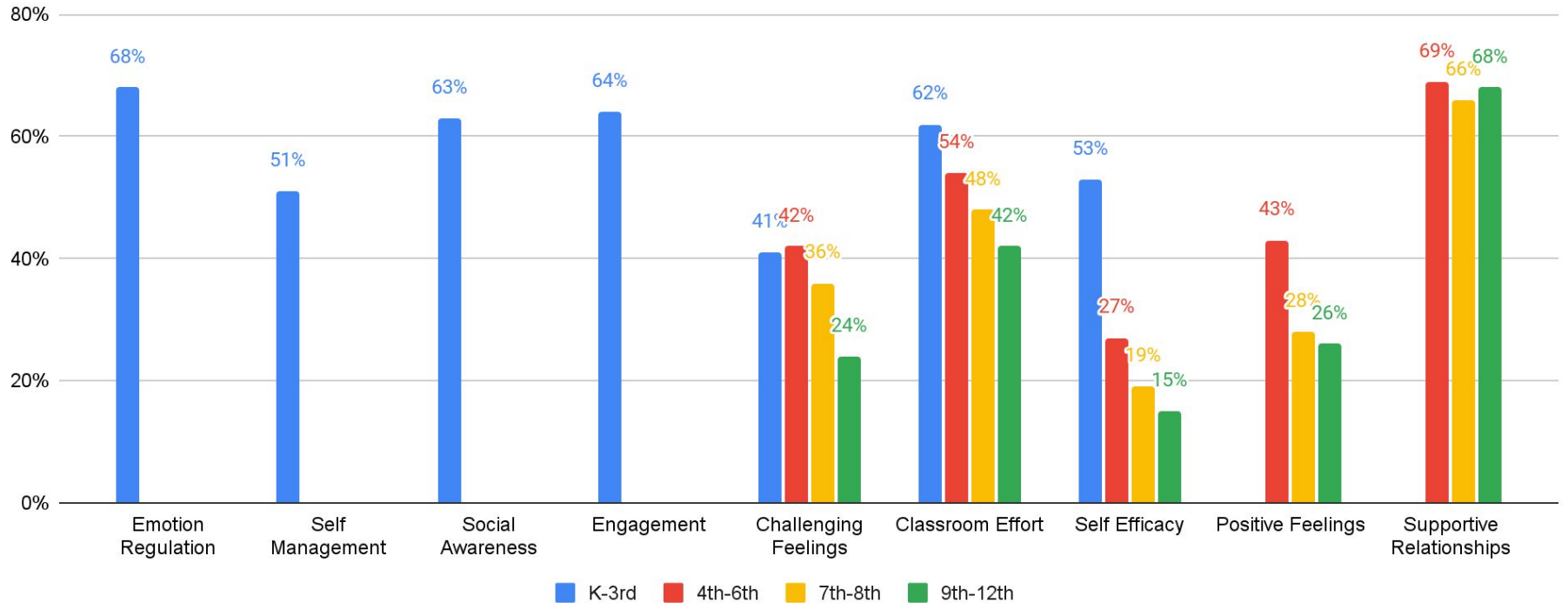
372 staff

.....



Surveys were completed online in Fall 2023

Panorama Fall 2023-2024 Survey Response



+4%

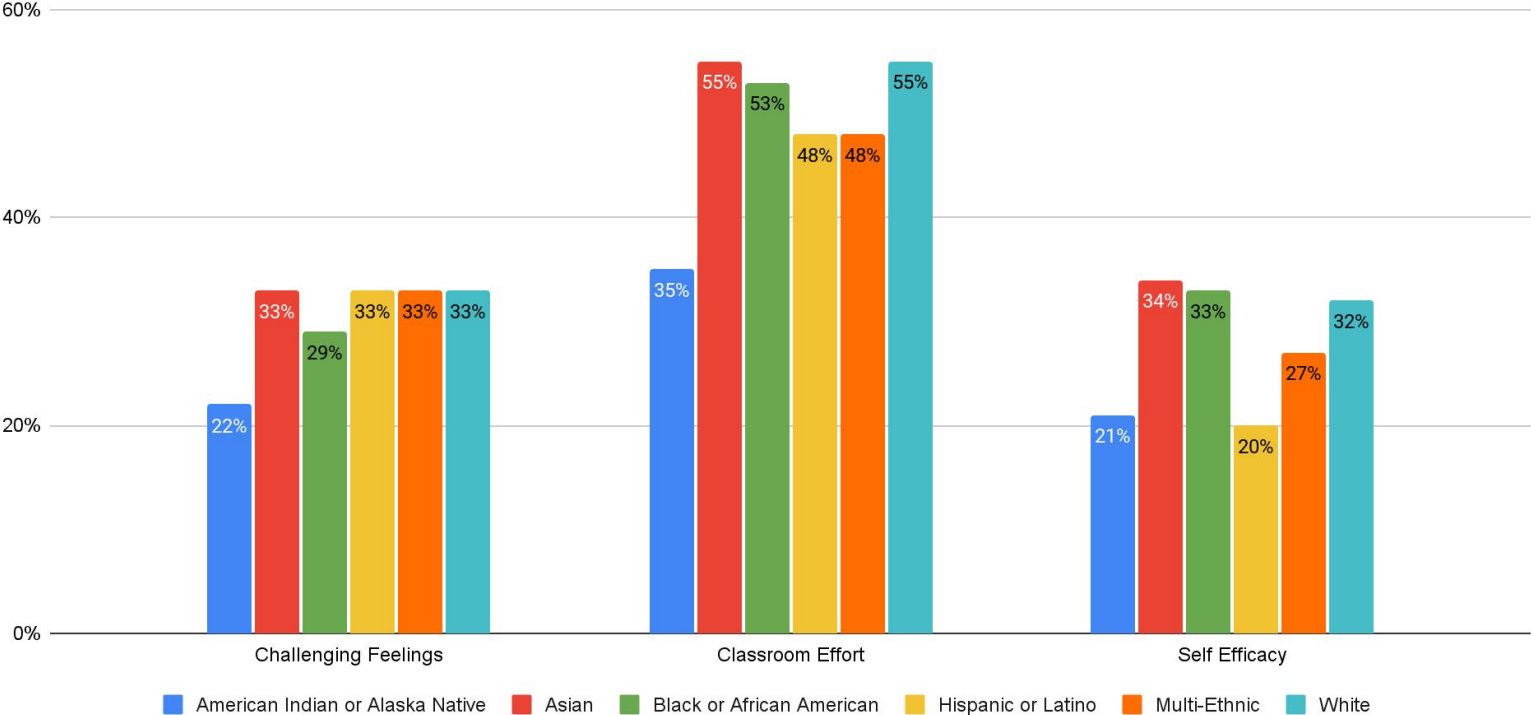
-1%

+5%

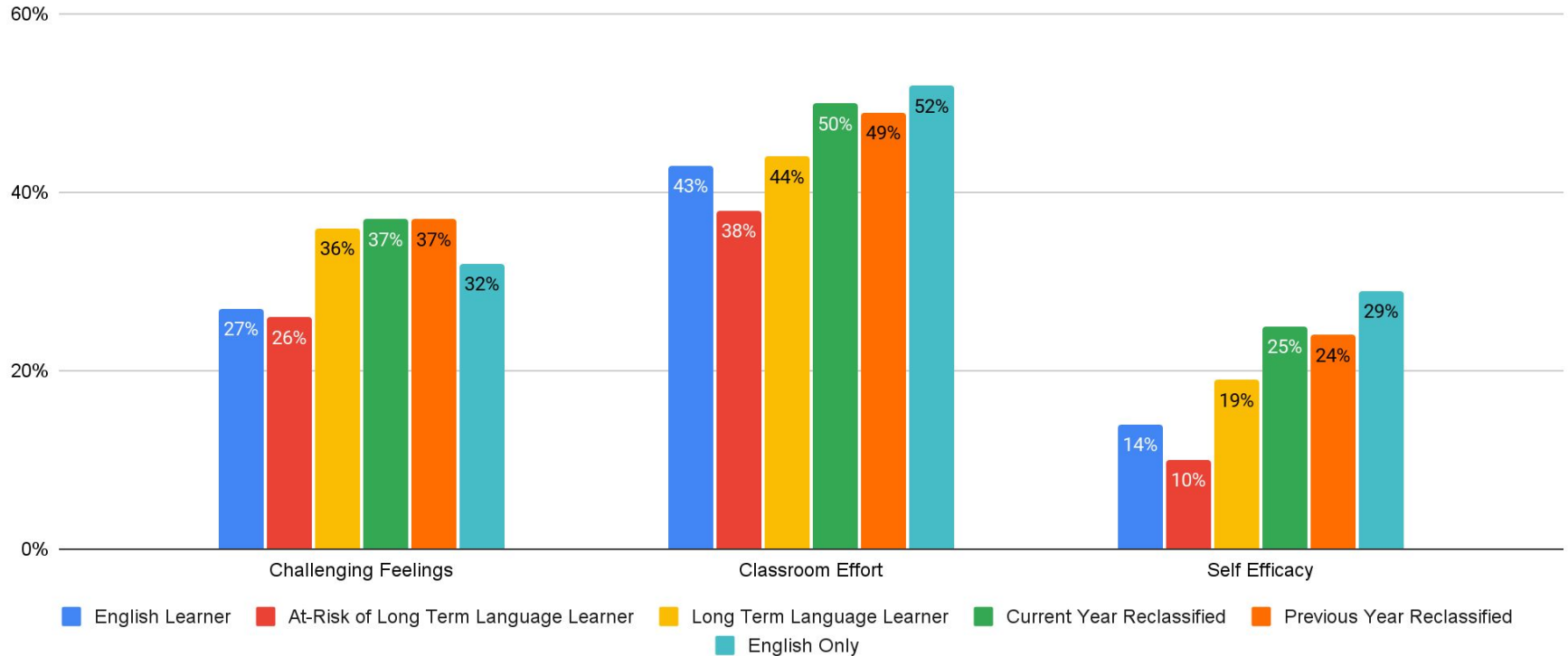
+5%

+4%

Panorama Fall 2023-2024 Survey Response



Panorama Fall 2023-2024 Survey Response



Youth Truth: **RESPONSE RATES**



9944 students responded (79%)

.....



2307 families responded (16%)

.....



876 SRCS Staff responded (71%)

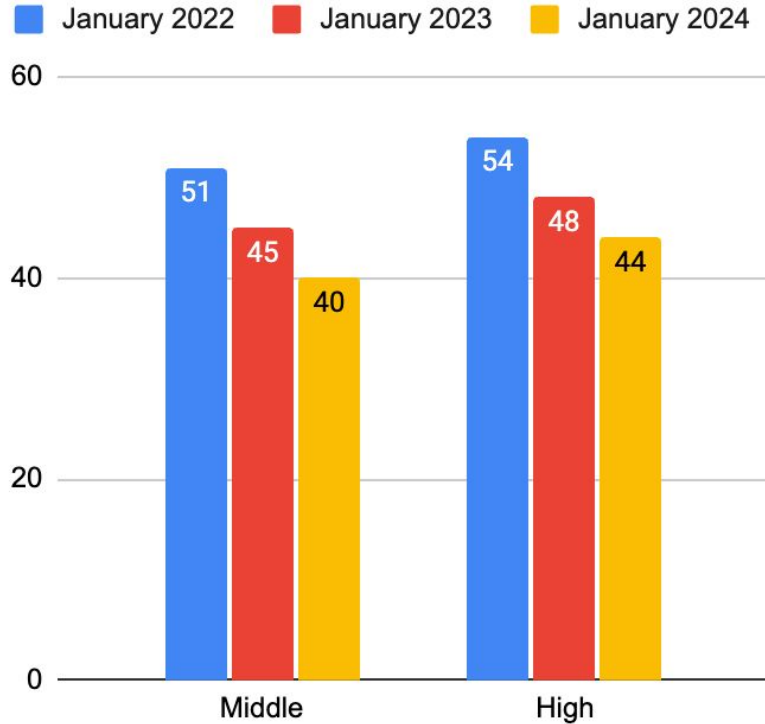
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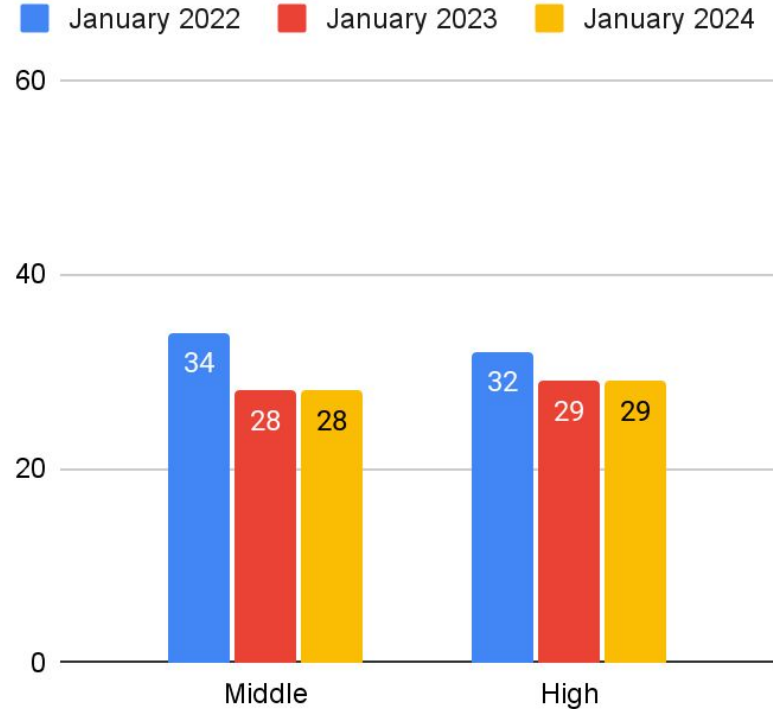
Surveys were completed online in January 2024

Youth Truth: Student Perceptions of

I Feel Safe at School

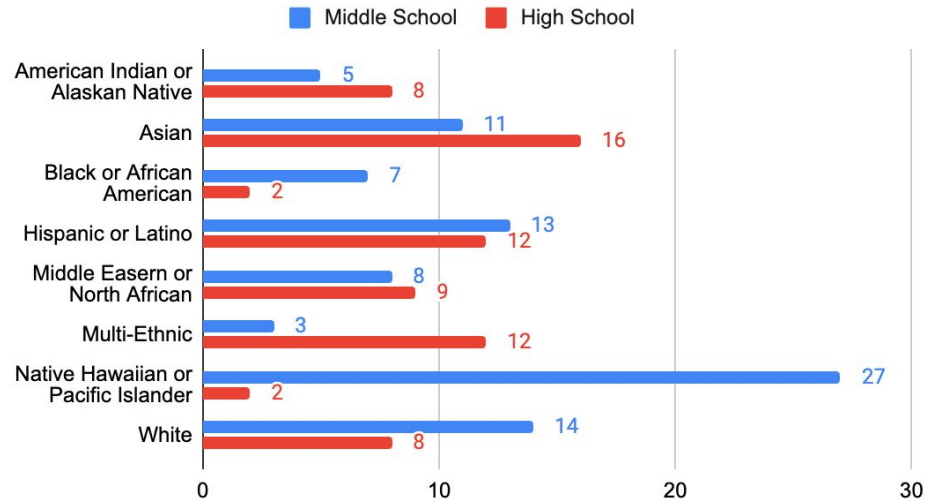


Discipline is Fair

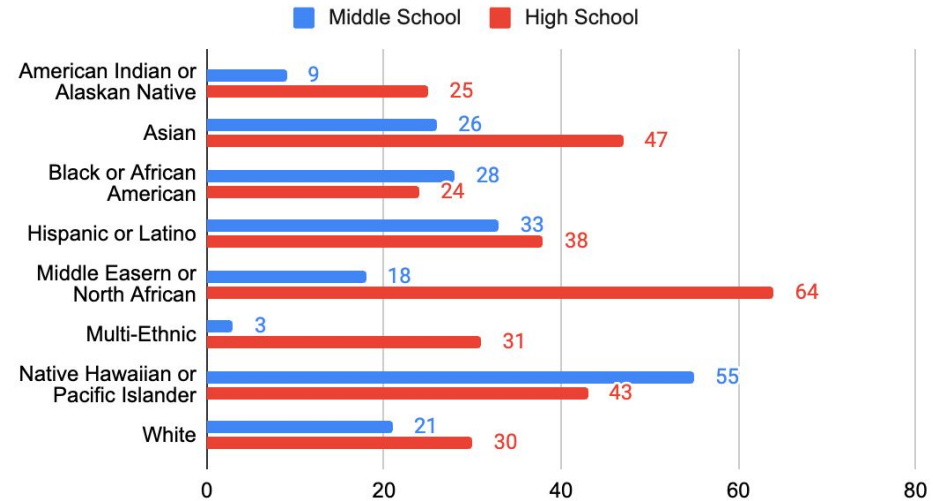


Youth Truth: Student Perceptions of

I Feel Safe at School



Discipline is Fair



Discipline Patterns

in

Santa Rosa City Schools

Dr. Emanuele Bardelli
Stacy Desideri
Ken Roberts
Linzey Ryan

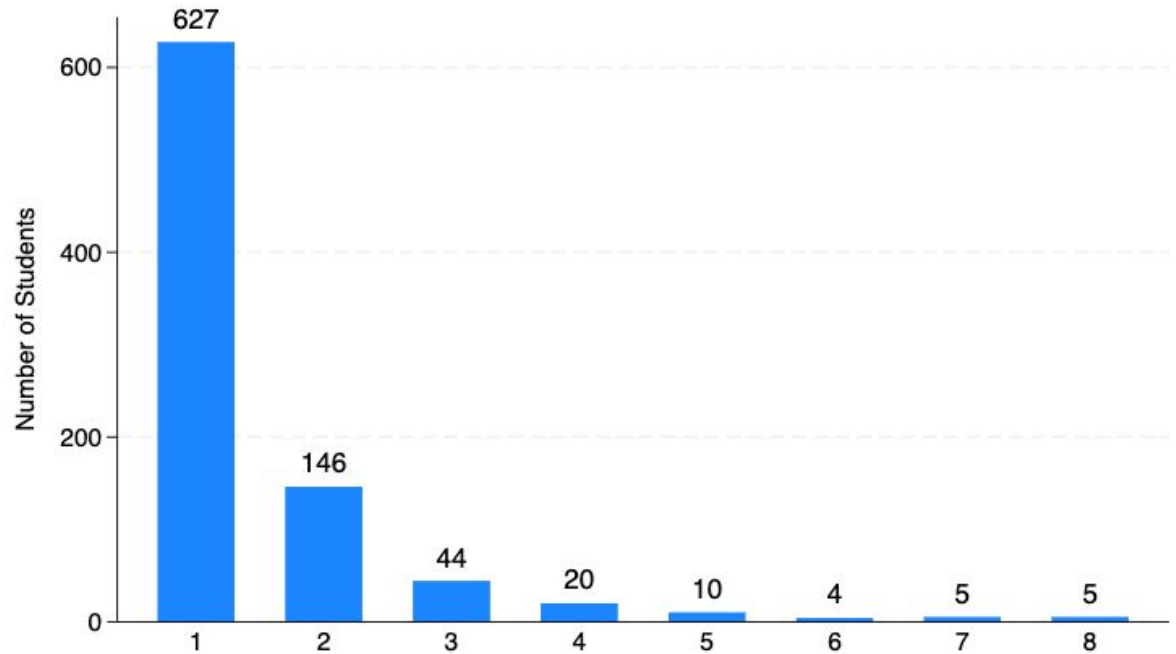


Who is suspended?

Number of Suspensions

6%

of our students
were suspended
at least once this
school year



Note: All data comes from the Student Information System. Updated 04/18/2024.

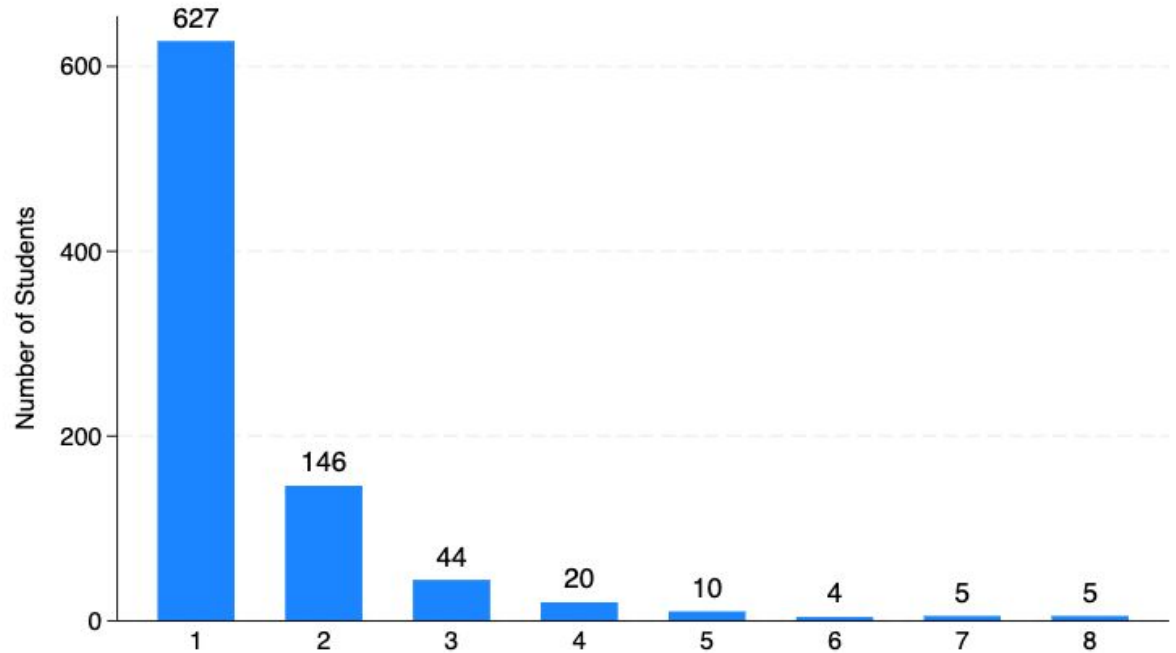
Number of Suspensions

73%

of the suspended students were suspended **once** this school year

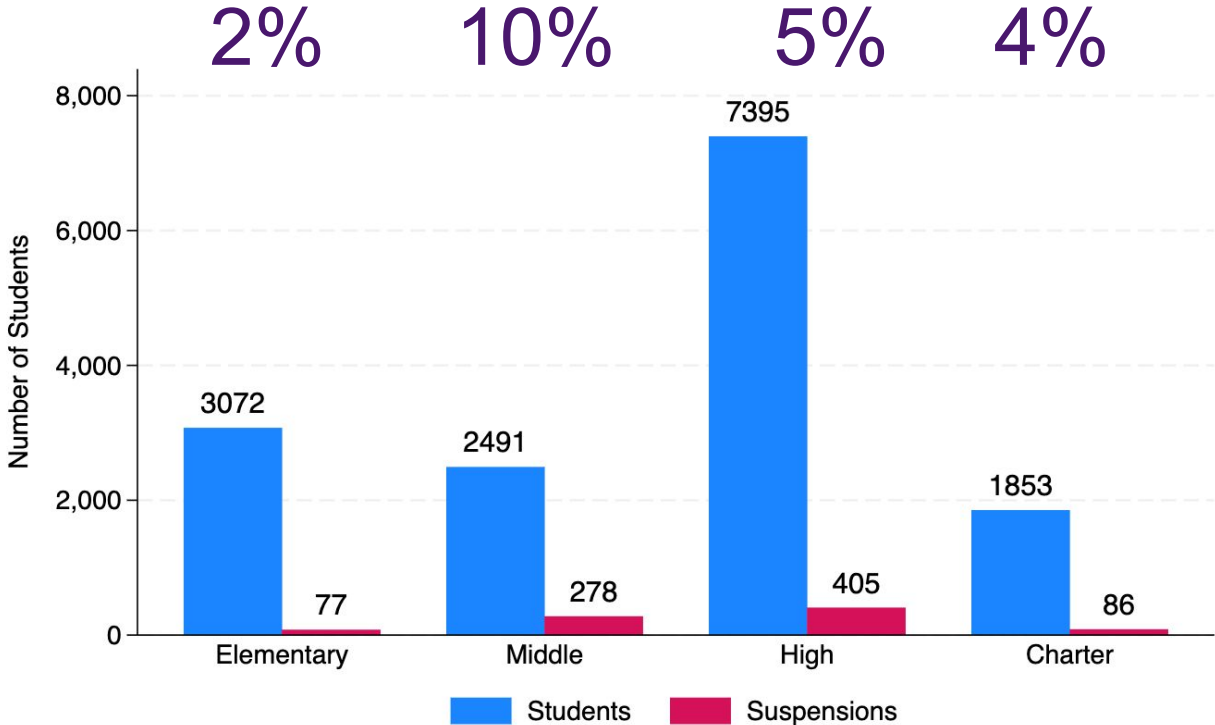
11%

Improvement year-to-year



Note: All data comes from the Student Information System. Updated 04/18/2024.

Suspensions by School Level vs. Enrollment



of our students experience a suspension

Note: All data comes from the Student Information System. Updated 04/18/2024.

This slide has been reformatted for clarity



Suspensions by School Level vs. Enrollment

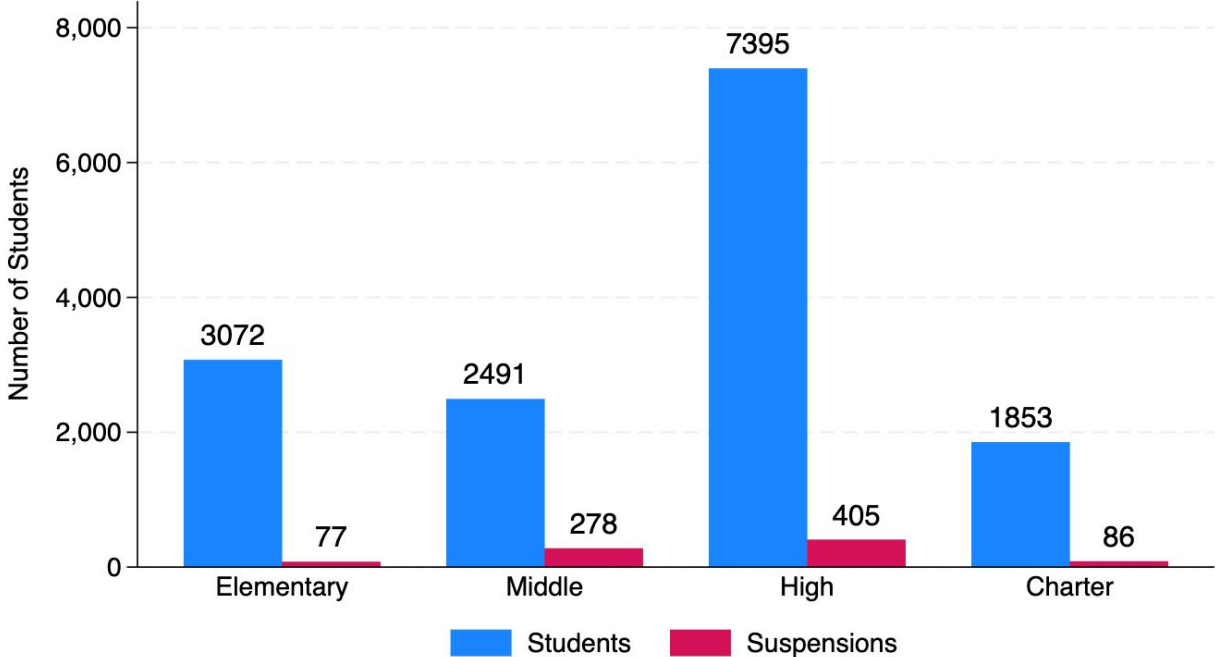
1 in 42

1 in 9

1 in 19

1 in 23

of our students experience a suspension



Note: All data comes from the Student Information System. Updated 04/18/2024.

This slide has been reformatted for clarity



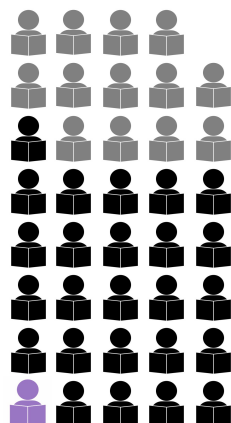
Suspensions Disproportionality by Race



1 in 7

American
Indian or
Alaska
Native

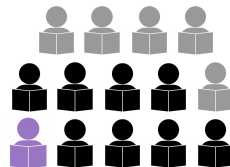
13 of 96



1 in 39

Asian
American and
Pacific
Islanders

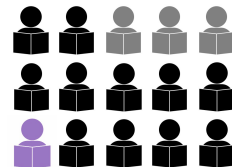
17 of 673



1 in 14

Black or
African
American

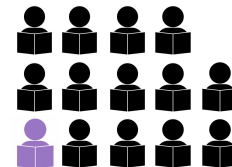
18 of 255



1 in 15

Hispanic or
Latino

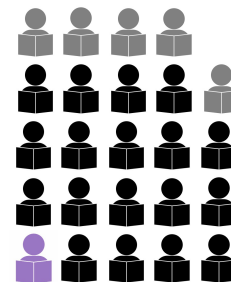
562 of 8818



1 in 14

Multi-ethnic

60 of 876



1 in 24

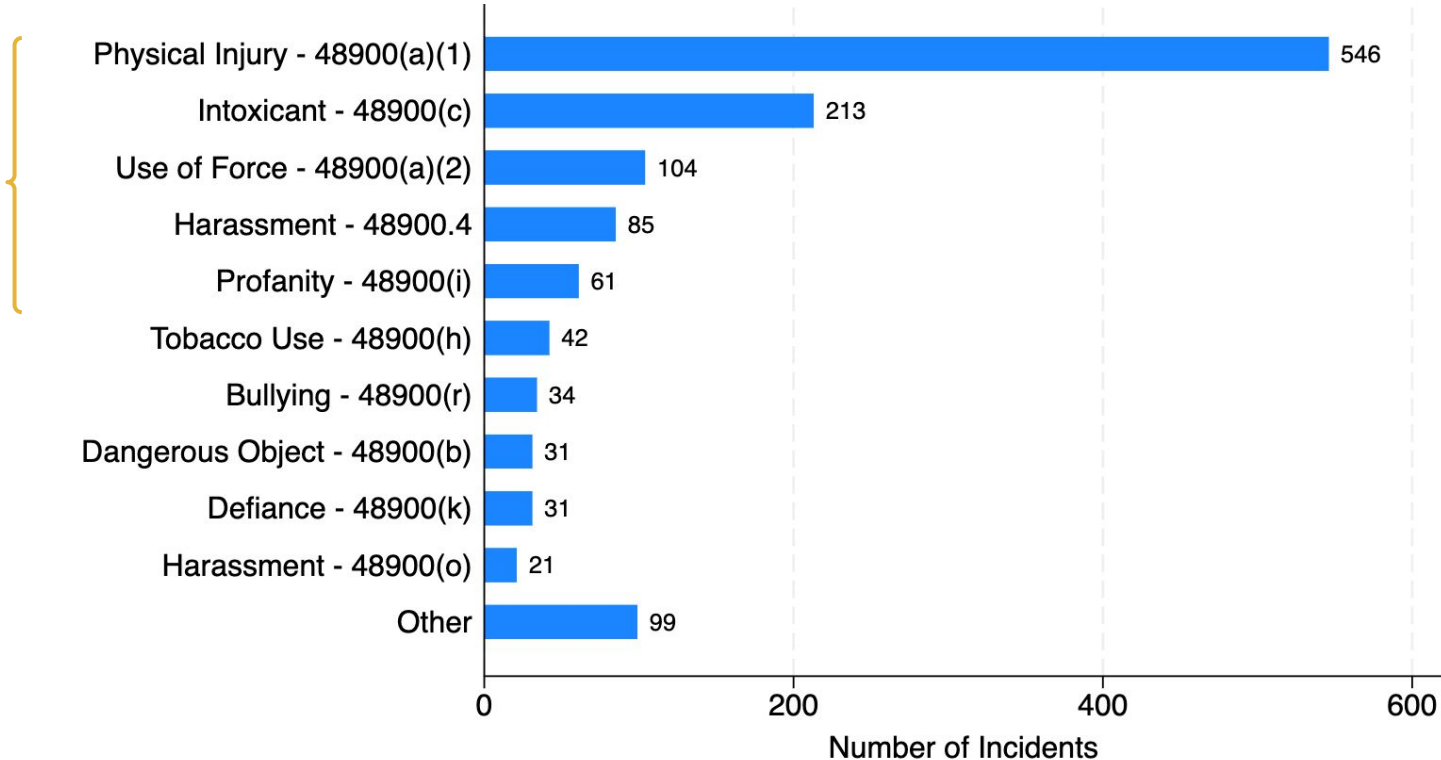
White

160 of 3959

What are students suspended for?

Suspensions by Primary Code for 2023/2024

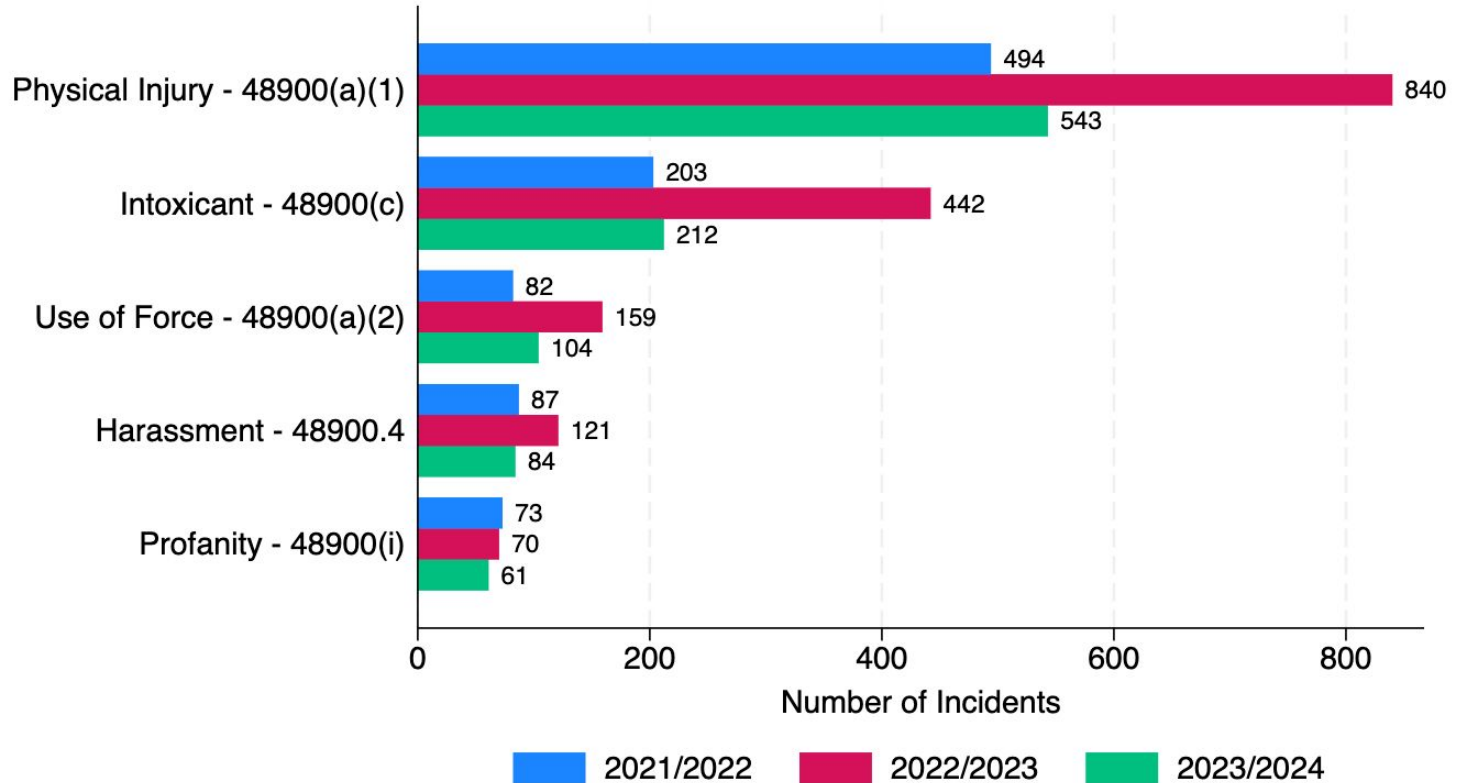
80%
of all incidents
fall in the
top five
violations



Note: All data comes from the Student Information System. Updated 04/18/2024.

Comparison between 2021, 2022, and 2023

45%
decrease in
incident
numbers in
the top 5
violations
year-to-year



Note: All data comes from the Student Information System. Updated 04/18/2024.

Attendance Patterns in Santa Rosa City Schools

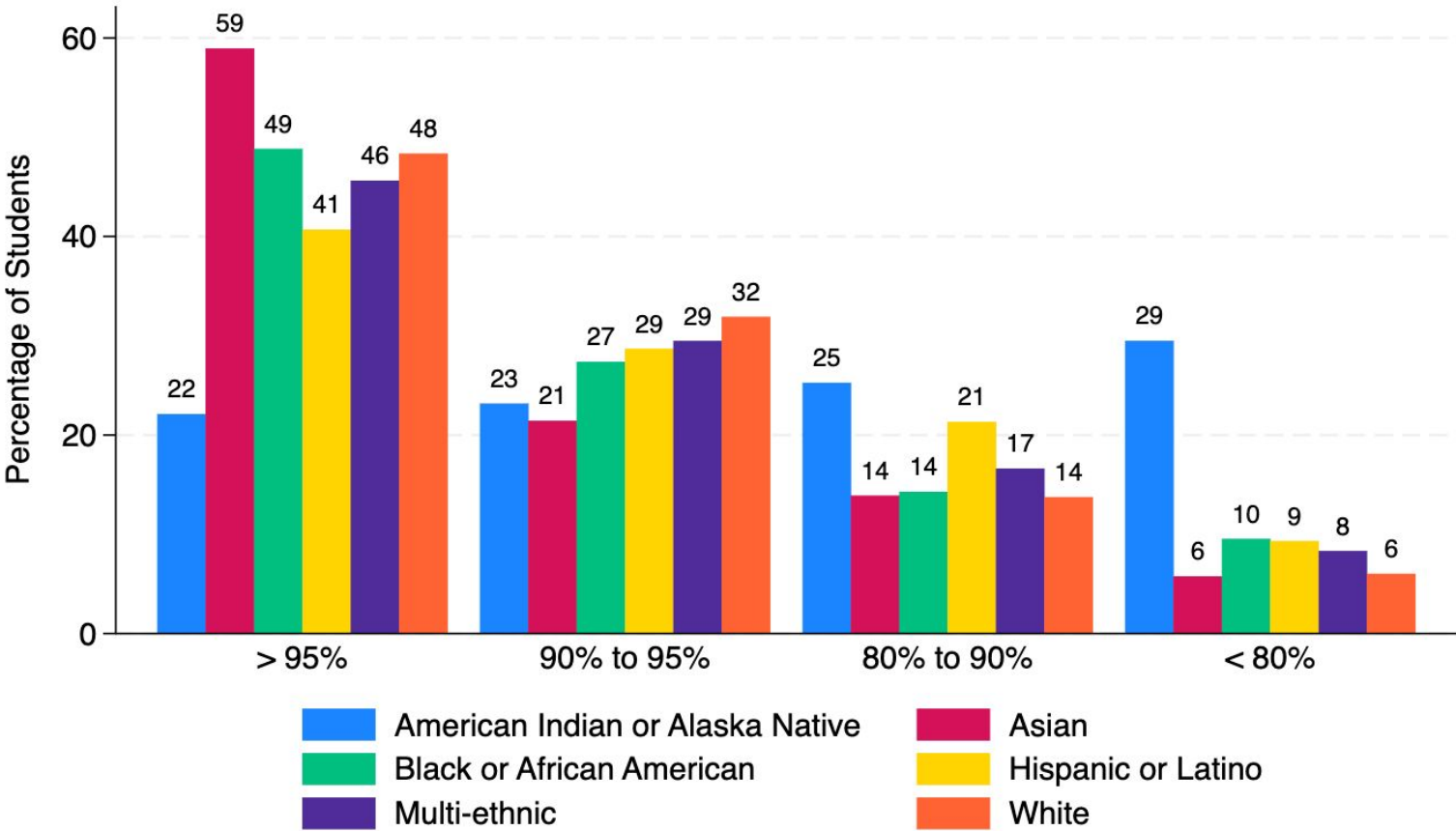
**Dr. Emanuele Bardelli
Stacy Desideri
Ken Roberts
Linzey Ryan**



Attendance

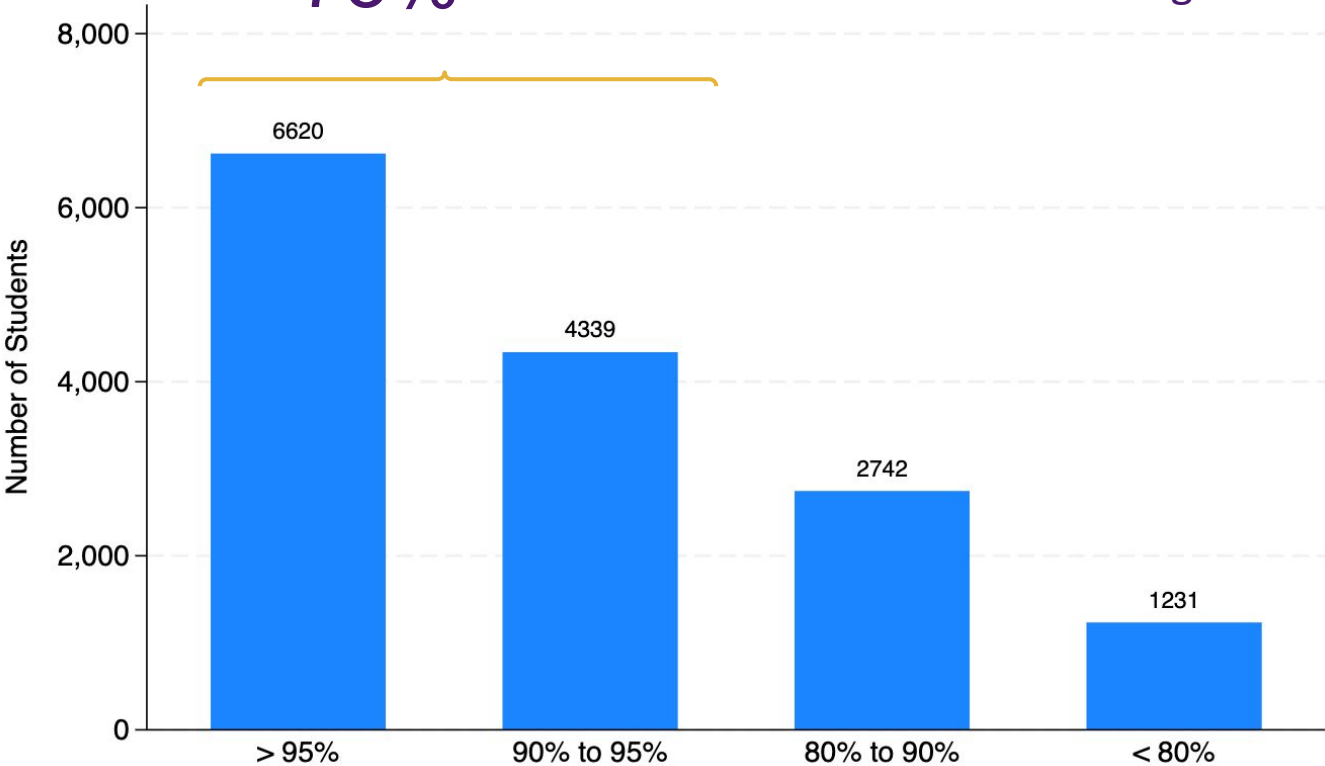
- All students are expected to attend school each day
- Ed Code allows for parents to excuse student absences under certain circumstances (e.g., illness, religious or cultural event, naturalization ceremony, civic or political event)
- Students become **chronically absent** if they are present for less than 90% of the school days
- Student become **truant** if they are absent without a valid excuse for more than 3 times during the school year

Chronic Absenteeism Rates



Chronic Absenteeism Rates

73% of all students have attendance higher than 90%


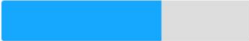
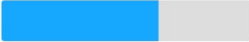






This slide has been reformatted for clarity

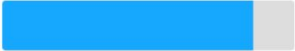

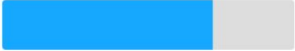







Questions?

Appendix

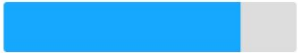









Panorama '24: STUDENT (K-3) DATA OVERVIEW (TEACHER PERCEPTION OF STUDENT)

Topic	↕ Percent Favorable [?]	Change since Fall 2022 [?]
Emotion Regulation ⁱ	68% 	0
Engagement ⁱ	64% 	▼ 1
Social Awareness ⁱ	63% 	▼ 1
Classroom Effort ⁱ	62% 	▲ 1
Self-Efficacy ⁱ	53% 	▲ 5 Greatest increase
Self-Management ⁱ	50% 	0
Challenging Feelings ⁱ	40% 	▲ 3

Panorama '24: STUDENT (GRADES 4-6) DATA OVERVIEW

Topic	Percent Favorable [?]	Compared to others nationally [?]	Change since Fall 2022 [?]
Supportive Relationships ⁱ	86% 	 20th-39th percentile	0
Classroom Effort ⁱ	72% 	 20th-39th percentile	0
Positive Feelings ⁱ	58% 	 0th-19th percentile	▼ 2
Challenging Feelings ⁱ	56% 	 60th-79th percentile	▼ 1
Self-Efficacy ⁱ	51% 	 20th-39th percentile	0

Panorama '24: STUDENT (GRADES 7-12) DATA OVERVIEW

Topic	↕ Percent Favorable [?]	Compared to others nationally [?]	Change since Fall 2022 [?]
Supportive Relationships ⁱ	81% 	 40th-59th percentile	▲ 2
Classroom Effort ⁱ	65% 	 20th-39th percentile	▼ 2
Challenging Feelings ⁱ	52% 	 40th-59th percentile	▲ 2
Positive Feelings ⁱ	46% 	 0th-19th percentile	▲ 1
Self-Efficacy ⁱ	38% 	 0th-19th percentile	▲ 1

Panorama Survey Responses - Counts

Grade Span	American Indian or Alaska Native	Asian	Black or African American	Hispanic or Latino	Multi- Ethnic	White	Total
K-3	12	58	34	1377	140	479	2100
4th-6th	9	84	22	1003	83	401	1602
7th-8th	7	134	31	1453	136	648	2409
9th-12th	32	327	90	2902	309	1453	5113
Total	60	603	177	6735	668	2981	11224

Grade Span	English Learner	At-Risk of Long Term Language Learner	Long Term Language Learner	Current Year Reclassified	Previous Year Reclassified	English Only	Total
K-3	643	206	0	37	40	1174	2100
4th-6th	72	268	158	81	230	793	1602
7th-8th	103	26	304	77	694	1205	2409
9th-12th	152	62	344	107	1813	2635	5113
Total	970	562	806	302	2777	5807	11224

Panorama '24: Students find strength in Supportive Relationships. Students report most favorably on the following relationship questions:

Q: Do you have a family member or other adult outside of school who you can count on to help you, no matter what?



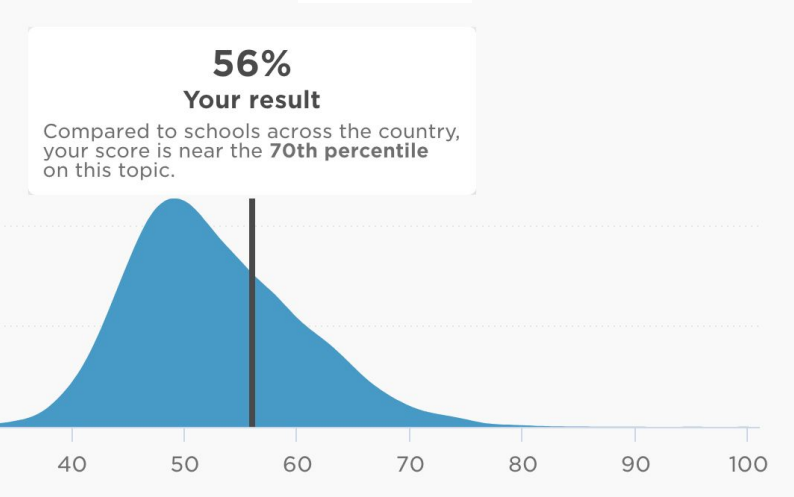
Q: Do you have a friend from school who you can count on to help you, no matter what?



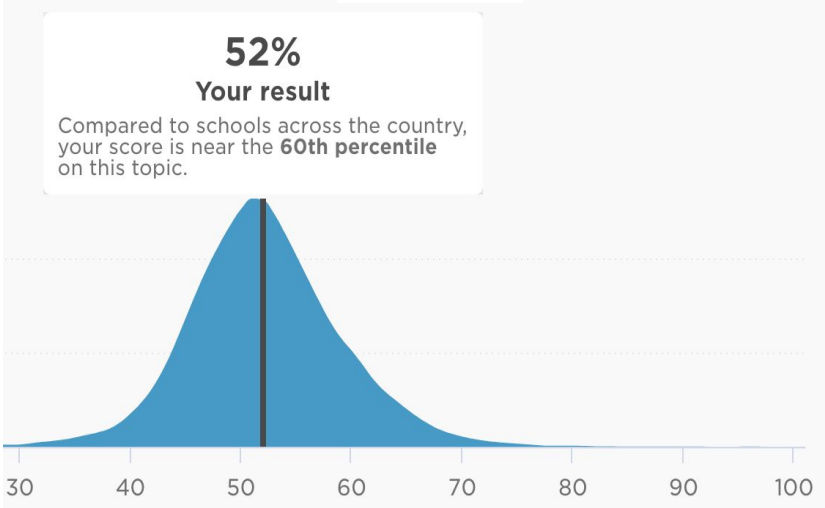
Panorama '24: Students also report strength in their ability to handle Challenging Feelings.

Compared to Panorama's national dataset, grades 4-6 report in the 70th percentile and grades 7-12 report in the 60th percentile on Challenging Feelings.

Grades 4-6

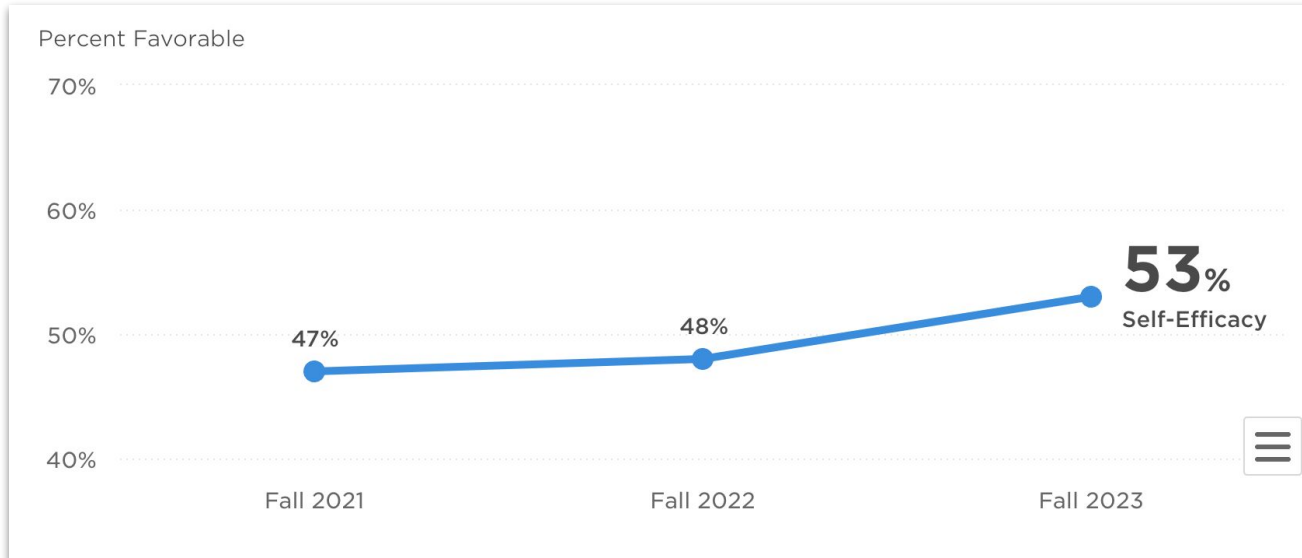


Grades 7-12



Panorama '24: One note of celebration within Self-Efficacy, however, is teacher perception of K-3 students, which increased by 5 points from Fall '22 to Fall '23.

Teacher Perception of Student Self-Efficacy (Grades K-3): Fall 2021 to Fall 2023





PANORAMA
EDUCATION

CROSSWALK

student survey

YouthTruth
STUDENT SURVEY
A NATIONAL NONPROFIT

Supportive Relationships ⓘ

Classroom Effort ⓘ

Positive Feelings ⓘ

Challenging Feelings ⓘ

Self-Efficacy ⓘ

STUDENT

Engagement
This summary measure describes the degree to which students perceive high expectations and feel engaged with their school and their education.

Academic Challenge
This summary measure describes the degree to which students feel their learning is challenging and relevant.

Instructional Methods (elementary only)
This summary measure describes the strategies and approaches students report their teachers using in class.

Culture
Varies by grade-level... elementary is orderly and respectful classroom; secondary is respectful and fair school.

Belonging and Peer Collaboration
This summary measure describes the degree to which students feel welcome at their school and have collaborative relationships with their classmates.

Relationships
This summary measure describes the degree to which students feel they receive support and personal attention from their teachers.

College & Career Readiness (high only)
This summary measure describes the degree to which students feel equipped to pursue college and careers.

Emotional & Mental Health
Students are asked to describe the degree to which they have they have external supports and intrinsic resources they can use to cope with problems.

Project-Based Learning
Students are asked a series of questions about their engagement with project- and problem-based learning.

Drugs & Alcohol (secondary only)
Students in Sonoma County Schools schools were asked whether, during the past month, they have used any of the following intoxicants or substances.

Obstacles to Learning (secondary only)
Students are asked whether, various circumstances make it hard for them to do their best.

Local Resilience Questions (secondary only)
Custom resilience questions for Sonoma County.

Youth Truth '24: I Feel Safe at School (High School)

I feel safe during school.

Custom settings have been set for this chart. This chart will not update when default settings are changed. [Use Default Settings](#)



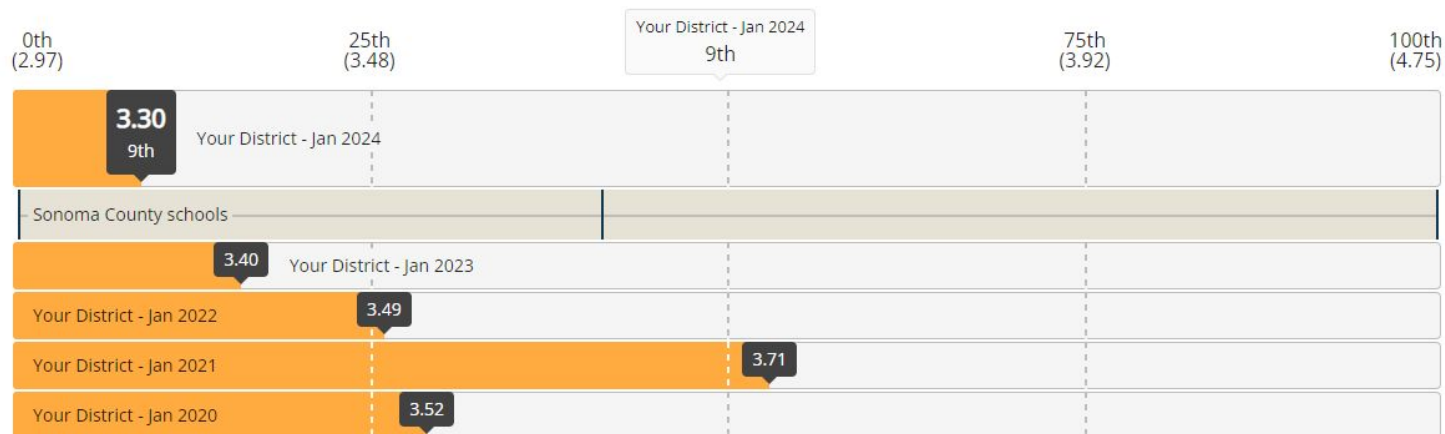
Cohort
Sonoma County schools

Subgroup
None

Show/Hide Data

Past Results

1 = Strongly disagree 3 = Neither agree nor disagree 5 = Strongly agree



Highest School (Nationally)

'Typical' School (Nationally)

Lowest School (Nationally)

Youth Truth '24: I Feel Safe at School (Middle School)

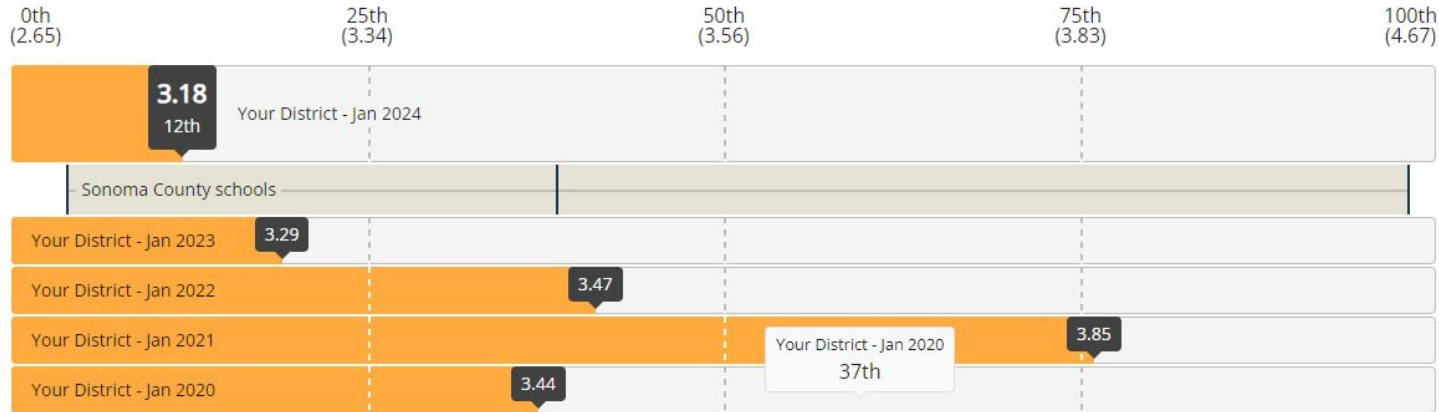
I feel safe during school.

Custom settings have been set for this chart. This chart will not update when default settings are changed. [Use Default Settings](#)



Cohort: **Sonoma County schools** Subgroup: **None** Show/Hide Data Past Results

1 = Strongly disagree 3 = Neither agree nor disagree 5 = Strongly agree



Highest School (Nationally)

'Typical' School (Nationally)

Lowest School (Nationally)

Chronic Absenteeism Rates - Counts

	> 95%	90% to 95%	80% to 90%	< 80%	Total
American Indian or Alaska Native	21	22	24	28	95
Asian	507	153	88	37	785
Black or African American	123	69	36	24	252
Hispanic or Latino	3,608	2,543	1,891	825	8,867
Multi-ethnic	401	259	146	73	879
White	1,960	1,293	557	244	4,054
Total	6,620	4,339	2,742	1,231	14,932