



# COOPERATIVE STRATEGIES

COMPLETE FINANCIAL & DEMOGRAPHIC PLANNING FOR EDUCATION

## LONG BEACH UNIFIED SCHOOL DISTRICT

### SCHOOL FACILITIES NEEDS ANALYSIS

FEBRUARY 15, 2018

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School District**

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## EXECUTIVE SUMMARY

This School Facilities Needs Analysis ("Analysis") has been prepared in accordance with applicable laws to provide the factual basis for the Long Beach Unified School District ("School District") to consider and, if desired, adopt alternative school facility fees ("Alternative Fees") that may be collected from residential development in the School District consistent with Section 17620 of the Education Code and Sections 65995.5, 65995.6, and 65995.7 of the Government Code (future code section references are to the Government Code unless otherwise specified). Please note that future residential development is inclusive of accessory dwelling units as identified in the City of Long Beach's Ordinance No. 17-0031, which are described as "additional living quarters on single-family lots that are independent of the primary dwelling unit" that may be attached or detached from the primary dwelling unit and "provide complete independent living facilities". Accessory dwelling units are not exempt from alternative school facility fees under Section 65995(b)(1) as they are complete dwelling units and not detached accessory structures which compliment the main dwelling unit. The Analysis provides factual information as to the following three (3) elements:

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

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

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

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

**B. Compliance with Statutory Requirements**

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

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

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

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

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

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

<b>Fee</b>	<b>Amount per Square Foot</b>
Alternative No. 2 Fee	\$4.14
Alternative No. 3 Fee	\$8.29

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

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

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

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

## I. GENERAL

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

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

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

## **Eligibility to Collect Alternative Fees**

### Eligibility to Receive State Funds

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

### Statutory Requirements

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

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

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

### Total Projected Student Enrollment

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

### Excess Capacity

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

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

#### Projected Unhoused Students

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

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

#### Surplus Property

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

#### Existing Surplus Local Funds

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

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

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

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

### Site Acquisition and Site Development Costs

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

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

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

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

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

### Alternative No. 2 Fee

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

## **Alternative No. 3 Fee**

### Alternative No. 3 Fee

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

## II. ELIGIBILITY TO COLLECT ALTERNATIVE FEES

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

### A. Eligibility to Receive State Funds

The School District has taken action electing to participate in the SFP established by Section 17070.10 of the Education Code. Additionally, the School District authorized a designated representative to (i) approve, certify, and submit the SAB Forms 50-01, 50-02, and 50-03 to the SAB and (ii) request an Eligibility Determination for new construction funding as required by the SFP. The School District filed SAB Forms 50-01, 50-02, and 50-03 and requested an Eligibility Determination for new construction funding as required by the SFP on February 10, 2000. On March 22, 2000, the Eligibility Determination of the School District was approved by the SAB. Subsequently, the School District submitted updated SAB Forms 50-01, 50-02, and 50-03 as part of its ongoing facilities planning and financing program. The most current SAB Forms 50-01, 50-02, and 50-03 are incorporated herein as Exhibits A, B, and C, respectively, and the School District was deemed by the State to be eligible for new construction funding under the SFP.

### B. Statutory Requirements

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

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

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

- a. *Unified School Districts and Elementary School Districts.* At least 30 percent of the school district's students in grades kindergarten through 6 are on a multi-track year-round schedule in the high school attendance area in which all or some of the new residential units identified in the Analysis are planned for construction.

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

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

**2. General Obligation Bond Measure**

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

**The School District has determined that this Statutory Requirement has been satisfied. This determination is based on the fact that Measure E was placed before the voters of the School District on the November 8, 2016, ballot and the measure received an approval rate of 74.86 percent. Voters approved \$1,500,000,000 for the modernization of existing school facilities and replacement of old portables throughout the School District. Please see Exhibit E for more information on Measure E.**

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

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

**The School District has determined that this Statutory Requirement has been satisfied. The School District currently has \$1,125,670,702 in outstanding GO Bond debt. This debt represents 72.03 percent of the School District's bonding capacity (see Exhibit F for a calculation of the School District's bonding capacity).**

4. **Relocatable Classrooms**

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

**The School District has determined that this Statutory Requirement has been satisfied. The School District currently has a total of 2,119 permanent classrooms and 1,088 relocatable classrooms. This equates to a 33.93 percent relocatable classroom utilization rate.**

C. **Eligibility to Collect Alternative Fees**

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

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

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

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

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

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

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

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

A total of 149 SFD units in the School District were identified as meeting the criteria stated above. Cooperative Strategies then obtained a database of all students within the School District at the beginning of school year 2017/2018. Upon comparison of the two (2) databases, 58 students were matched to the 149 SFD units, resulting in the following SGRs for SFD units shown in Table 1.

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

School Level	Number of Students Matched	Number of SFD Units	Student Generation Rates
Elementary School (Grades K-5)	24	149	0.1611
Middle School (Grades 6-8)	17	149	0.1141
High School (Grades 9-12)	17	149	0.1141
<b>Total</b>	<b>58</b>	<b>N/A</b>	<b>0.3893</b>

A process identical to the one described above for SFD units was used to determine SGRs for SFA units. Cooperative Strategies examined SFA units constructed over the previous five (5) years and determined that a total of 101 units meet the criteria stated above. A comparison of these units to the student database revealed a total match of 14 students. Table 2 shows a summary of the calculation of the SGRs for SFA units.

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

School Level	Number of Students Matched	Number of SFA Units	Student Generation Rates
Elementary School	8	101	0.0792
Middle School	3	101	0.0297
High School	3	101	0.0297
<b>Total</b>	<b>14</b>	<b>N/A</b>	<b>0.1386</b>

The process identical to the one described above for SFD and SFA units was used to determine SGRs for MF units. Cooperative Strategies examined MF units constructed over the previous five (5) years and determined that a total of 137 units meet the criteria stated above. A comparison of these units to the student database revealed a total match of 24 students. Table 3 shows a summary of the calculation of the SGRs for MF units.

**Table 3  
Student Generation Rates for Multifamily Units**

<b>School Level</b>	<b>Number of Students Matched</b>	<b>Number of MF Units</b>	<b>Student Generation Rates</b>
Elementary School	7	137	0.0511
Middle School	3	137	0.0219
High School	14	137	0.1022
<b>Total</b>	<b>24</b>	<b>N/A</b>	<b>0.1752</b>

**2. Future Units**

In order to obtain information regarding future residential units, the planning departments of the cities of Avalon, Lakewood, Long Beach, and Signal Hill (collectively, "Cities") and were contacted (please refer to the map on the following page for a geographic profile of the School District). Based on correspondence from the Cities (see Exhibit G), Cooperative Strategies has determined that the School District could experience the construction of 4,778 Future Units over the next five (5) years. Please note that future residential development is inclusive of accessory dwelling units as identified in the City of Long Beach’s Ordinance No. 17-0031, which are described as “additional living quarters on single-family lots that are independent of the primary dwelling unit” that may be attached or detached from the primary dwelling unit and “provide complete independent living facilities”. Table 4 distinguishes between Future Units by unit type.

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

**Table 4  
Future Units by Unit Type**

<b>Unit Type</b>	<b>Total Future Units</b>
Single Family Detached	528
Single Family Attached	411
Multifamily	3,839
<b>Total Units</b>	<b>4,778</b>



The projected number of future residential units in Table 4 includes units that may result from existing structures that are voluntarily demolished in order to be replaced by new residential development ("Reconstruction"). For additional information regarding the imposition of the Alternative No. 2 Fee and Alternative No. 3 Fee on Reconstruction please refer to Exhibit H.

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

**3. Projected Student Enrollment**

To calculate the Projected Student Enrollment, the number of Future SFD units, Future SFA units, and Future MF units listed in Table 4 were multiplied by the SGRs shown in Tables 1, 2, and 3. The results of this operation are shown in Table 5.

**Table 5  
Projected Student Enrollment**

<b>School Level</b>	<b>Total Projected Students from Future Units</b>
Elementary School	314
Middle School	156
High School	464
<b>Total</b>	<b>934</b>

**B. Current Capacity**

Collectively, the School District's school facilities in school year 2017/2018 have a capacity of 82,305 seats per Section 17071.25 of the Education Code. Of these 82,305 seats, 44,779 are at the elementary school level, 13,776 are at the middle school level, and 23,750 are at the high school level (the School District's school level configuration in this comparison has been altered to be consistent with SAB Form 50-02). These capacities include seats from all new school facility construction projects funded by the State. Based on student enrollment data for school year 2017/2018, the enrollment of the School District is 74,576 students. As shown in Table 6, facilities capacity exceeds student enrollment at all school levels in school year 2017/2018.

**Table 6  
Existing School Facilities Capacity and Student Enrollment**

<b>School Level <sup>[1]</sup></b>	<b>2017/2018 Facilities Capacity <sup>[2]</sup></b>	<b>2017/2018 Student Enrollment <sup>[3]</sup></b>	<b>Excess/ (Shortage) Capacity</b>
Elementary School (Grades K-6)	44,779	40,139	4,640
Middle School (Grades 7-8)	13,776	11,273	2,503
High School (Grades 9-12)	23,750	23,164	586
<b>Total</b>	<b>82,305</b>	<b>74,576</b>	<b>7,729</b>

*[1] The School District operates elementary schools that serve grades K-5 and middle schools that serve grades 6-8. To compare capacity and enrollment consistent with SAB Form 50-02, the School District's school level configuration has been altered in this section.*

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

*[3] Student enrollment from October 2017.*

### **C. Projected Unhoused Students**

As shown in Table 6, the existing facilities capacity of the School District determined in accordance with Section 65995.6(a) exceeds student enrollment currently being generated from existing residential units by 4,640 seats at the elementary school level, 2,503 seats at the middle school level, and 586 seats at the high school level. These surplus seats exist at facilities which will house (i) students generated from Future Units and (ii) students generated from units developed beyond the five-year period of the Analysis.

The School District will experience growth beyond the next five (5) years. Therefore, the surplus seats identified in Table 6 must be allocated between the Future Units shown in Table 4 and residential units to be constructed beyond the next five (5) years. According to information obtained from the Southern California Association of Governments ("SCAG"), the School District can expect an additional 16,620 residential units through calendar year 2035. This number includes Future Units and residential units to be constructed beyond the next five (5) years. Allocating the surplus seats identified in Table 6 between Future Units and residential units to be constructed beyond the next five (5) years based on the number of students each group of units is expected to generate results in 902 surplus seats at the elementary school level, 400 surplus seats at the middle school level, and 166 surplus seats at the high school level to be allocated over the next five (5) years. Table 7 shows the Projected Unhoused Students from Future Units at each school level, while Exhibit J provides more information regarding the allocation of surplus seats.

**Table 7**  
**Projected Unhoused Students from Future Units**

<b>School Level</b>	<b>Projected Student Enrollment</b>	<b>Surplus Seat Determination</b>	<b>Projected Unhoused Students</b>
Elementary School	314	902	0
Middle School	156	400	0
High School	464	166	298
<b>Total</b>	<b>934</b>	<b>1468</b>	<b>298</b>

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

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

As for identifying and considering existing excess capacity that could accommodate the Projected Student Enrollment generated from Future Units, Table 8 in Section III.C. of this Analysis illustrates that the School District has considered and determined that 902 excess seats exist at the elementary school level, 400 excess seats exist at the middle school level, and 166 excess seats exist at the high school level and has reduced the Projected Student Enrollment generated from Future Units accordingly.

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

## V. ALTERNATIVE NO. 2 FEE

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

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

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

#### 1. Per-Pupil Grant Amounts

The per-pupil grant amounts identified in Section 17072.10(a) of the Education Code were adjusted by the SAB on January 24, 2018, pursuant to Section 17072.10(b) of the Education Code. The per-pupil grant amounts specified in Section 17072.10 are adjusted annually by the SAB to reflect construction cost changes as set forth in the statewide cost index for class B construction. Further, pursuant to SAB Regulation 1859.71.2 and Section 17074.56 of the Education Code, the per-pupil grants have been increased to account for automatic fire alarm detection systems and fire sprinkler systems. Table 8 shows the base per-pupil grant amounts.

**Table 9**  
**Base Per-Pupil Grant Amounts (2018\$)**

School Level	Per-Pupil Grant Amount	Additional Grants for Auto Alarm and Fire Sprinkler System	Base Per-Pupil Grant Amount
Elementary School	\$11,567	\$208	\$11,775
Middle School	\$12,234	\$249	\$12,483
High School	\$15,567	\$271	\$15,838

In addition to the base per-pupil grant amounts shown in Table 8, SAB Regulation 1859.76 provides additional grants for general site development on new school construction projects. Currently, these additional grants are calculated as (i) 6 percent of the base per-pupil grants for elementary and middle school projects, (ii) 3.75 percent of the base per-pupil grants for high school projects and (iii) a grant of \$18,827 per new useable acre acquired for new school construction. To determine the general site development grant for each school level, Cooperative Strategies first applied the percentages mentioned above to the base per-pupil grant amounts shown in Table 8.

Second, Cooperative Strategies applied the grant per new useable acre mentioned above to the student capacity of future school facilities and corresponding site size requirements for the School District listed in Table 11 to derive a grant amount per student (see Exhibit M for more information on the calculation of the additional grants for general site development). Table 9 shows these additional grants as well as the total per-pupil grant amount.

**Table 9**  
**Total Per-Pupil Grant Amount (2018\$)**

School Level	Base Per-Pupil Grant Amount	Additional Grants for General Site Development	Total Per-Pupil Grant Amount
Elementary School	\$11,775	\$956	\$12,731
Middle School	\$12,483	\$1,112	\$13,595
High School	\$15,838	\$1,199	\$17,037

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

**2. Total New School Construction Grants**

To determine the total new school construction grants under Section 65995.5, the number of Projected Unhoused Students to be generated from Future Units, as shown in Table 7, is multiplied by the total per-pupil grant amounts set forth in Section 17072.10(a) and (b) of the Education Code, as shown in Table 9. Table 10 shows the total new school construction grants of the School District pursuant to Section 65995.5(c)(1).

**Table 10**  
**Total New School Construction Grants for Projected**  
**Unhoused Students from Future Units (2018\$)**  
**(In Accordance with Section 65995.5(c)(1) of the Government Code)**

School Level	Projected Unhoused Students	Total Per-Pupil Grant Amount	Total New Construction Grants
Elementary School	0	\$12,731	\$0
Middle School	0	\$13,595	\$0
High School	298	\$17,037	\$5,077,026
<b>Total</b>	<b>298</b>	<b>N/A</b>	<b>\$5,077,026</b>

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

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

**a. Site Size Requirement**

To calculate the amount of site acquisition and site development costs that may be included in the Alternative No. 2 Fee, a school district must determine the student capacity of future school facilities that will be needed to accommodate the Projected Unhoused Students, as well as students to be generated from residential development anticipated to occur over the next 20 years. Based on the educational programs of the School District, the School District has determined that future elementary school facilities will be designed to accommodate 800 students, future middle school facilities will be designed to accommodate 850 students, and future high school facilities will be designed to accommodate 800 students. Based on these capacities, the guidelines included in the "School Site Analysis and Development Handbook" published by the State Department of Education as that handbook read as of January 1, 1998, identify the following site sizes for the School District.

**Table 11**  
**Student Capacities and Site Sizes of Future School Facilities**

School Level	Student Capacity	Site Size (Acres)
Elementary School	800	10.60
Middle School	850	16.40
High School	800	25.70

It should be emphasized that the site sizes shown in Table 11 are based on site sizes recommended by the State Department of Education as of January 1, 1998. Since that time, the State Department of Education has prepared a revised Handbook that contains site size recommendations more consistent with School District policy. Please refer to Exhibit D for the site sizes more consistent with the revised Handbook.

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

It has been determined that \$2,356,106 per acre is a reasonable estimate for site acquisition at all school levels. This estimate is based on appraisal information by R.P. Laurain and Associates, Inc. dated January 24, 2014 for a potential school site in the Jordan High School Attendance Area. As for site development, the School District estimates the cost to be approximately \$444,296 per acre at all school levels (the site development cost was taken from the School Facilities Needs Analysis prepared in 2017 and adjusted by the annual change in the construction cost index as published by Marshall & Swift). Table 12 lists the total estimated site acquisition costs and site development costs of the School District in accordance with Section 65995.5(h).

**Table 12**  
**Site Acquisition and Site Development Costs of Future School Facilities (2018\$)**

School Level	Site Acquisition Cost <sup>[1]</sup>	Site Development Cost <sup>[1]</sup>	Total Site Cost
Elementary School	\$24,974,724	\$4,846,119	\$29,820,843
Middle School	\$38,640,138	\$7,497,768	\$46,137,906
High School	\$60,551,924	\$11,749,552	\$72,301,476

*[1] The site acquisition and site development costs are equal to the per acre costs listed above multiplied by the number of acres, as listed in Table 11.*

**c. School Facilities Needed**

To ensure that Future Units are being charged an Alternative No. 2 Fee that is reasonably related to the school facilities that are required to house the Projected Unhoused Students to be generated from Future Units, the School District must identify the number of future school facilities that will be needed to house the Projected Unhoused Students to be generated from Future Units, as well as students to be generated from mitigated Future Units and residential development anticipated to occur over the next 20 years. To calculate the number of school facilities that the School District will need to adequately house the Projected Unhoused Students, the number of Projected Unhoused Students for each school level, as listed in Table 7, was divided by the applicable student capacity, as listed in Table 11. The number of school sites expected to be needed to house the Projected Unhoused Students generated from Future Units is shown in Table 13.

**Table 13  
School Facilities Needed**

<b>School Level</b>	<b>Projected Students from Future Units</b>	<b>Facilities Capacity</b>	<b>Total Facilities Needed</b>
Elementary School	0	800	0.000
Middle School	0	850	0.000
High School	298	800	0.373

It is important to realize that while the number of Projected Unhoused Students equates only to approximately 37.3 percent of a high school, the School District will need to construct at least one (1) high school in the future to accommodate (i) students generated from Future Units and (ii) students generated from future residential units beyond the next five (5) years.

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

The calculation of the total school site acquisition and site development cost impacts under Section 65995.5(h) is a two-step process. The first step involves calculating the total school site acquisition and site development costs related to the Projected Unhoused Students generated from Future Units. The calculation of this first step is shown in Table 14.

**Table 14**  
**Total School Site Acquisition and Site Development**  
**Costs for Students from Future Units (2018\$)**

School Level	Facilities Needed for Students Generated from Non-Mitigated Future Units	Site Cost	Total Site Costs <sup>[1]</sup>
Elementary School	0.000	\$29,820,843	\$0
Middle School	0.000	\$46,137,906	\$0
High School	0.373	\$72,301,476	\$26,968,451

*[1] Numbers may not sum due to rounding.*

Only a portion of the total site costs may be included in the calculation of the Alternative No. 2 Fee. Accordingly, the total school site acquisition and site development costs under Section 65995.5(h) must be reduced by half to arrive at the Alternative Fee No. 2 Site Costs. The calculation of this step is shown in Table 16.

**Table 16**  
**Alternative No. 2 Fee Site Costs (2018\$)**  
**(In Accordance with Section 65995.5(h) of the Government Code)**

School Level	Total Site Costs	Multiplier	Alternative No. 2 Fee Site Cost
Elementary School	\$0	50.00%	\$0
Middle School	\$0	50.00%	\$0
High School	\$26,968,451	50.00%	\$13,484,226

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

As stated previously, the initial step in calculating the maximum Alternative No. 2 Fee is to identify (i) the total new school construction grant, and (ii) the site acquisition and development costs pursuant to Section 65995.5(h). The sum of these amounts, which is the Alternative No. 2 Fee School Facility Costs, is the maximum amount of school facility costs that may be included in the Alternative No. 2 Fee before any local fund credits are applied. For the School District, the total new school construction grant is \$5,077,026 and the total site acquisition and site development cost pursuant to Section 65995.5(h) is \$13,484,226. These costs and the Alternative No. 2 Fee School Facility Costs are shown by school level in Table 16.

**Table 16**  
**Alternative No.2 Fee School Facility Costs (2018\$)**  
**(In Accordance with Section 65995.5(c)(1) of the Government Code)**

School Level	Total New Construction Grants	Alternative No. 2 Fee Site Costs	Alternative No. 2 Fee School Facility Costs
Elementary School	\$0	\$0	\$0
Middle School	\$0	\$0	\$0
High School	\$5,077,026	\$13,484,226	\$18,561,252
<b>Total</b>	<b>\$5,077,026</b>	<b>\$13,484,226</b>	<b>\$18,561,252</b>

**B. Credit for Local Funds**

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

**Table 17**  
**Net Alternative No.2 Fee School Facility Costs (2018\$)**  
**(In Accordance with Section 65995.5(c)(2) of the Government Code)**

Item	Amounts
Alternative No. 2 Fee School Facility Costs	\$18,561,252
Credit for Existing Surplus Local Funds	\$0
<b>Net Alternative No. 2 Fee School Facility Costs</b>	<b>\$18,561,252</b>

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

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

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

In order to project the total square footage of assessable space of the Future Units, the Analysis must estimate the average square footage of Future SFD Units, Future SFA Units, and Future MF Units to be constructed in the School District. Based on information provided by the Cities, Cooperative Strategies calculated the weighted average square footage for each unit type. Based on that calculation, the average Future SFD Unit to be constructed within the School District is estimated to contain 1,166 square feet, the average Future SFA Unit is estimated to contain 1,016 square feet, and the average Future MF Unit estimated to contain 898 square feet (see Exhibit G).

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

To calculate the total square footage of assessable space for Future Units, the average square footage of Future SFD Units, Future SFA Units, and Future MF Units listed above was multiplied by the number of Future Units listed in Table 4. The results of this operation are shown in Table 18.

**Table 18**  
**Estimated Total Residential Square Footage**

<b>Land Use</b>	<b>Future Units</b>	<b>Average Square Footage</b>	<b>Total Square Footage</b>
Single Family Detached	528	1,166	615,648
Single Family Attached	411	1,016	417,576
Multifamily	3,839	898	3,447,422
<b>Total</b>	<b>4,778</b>	<b>N/A</b>	<b>4,480,646</b>

The projected total square footage of future residential units identified in Table 18 includes units that may result from Reconstruction. For additional information regarding the imposition of the Alternative No. 2 Fee and Alternative No. 3 Fee on Reconstruction please refer to Exhibit H.

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

To calculate the Alternative No. 2 Fee, the Net Alternative No. 2 Fee School Facility Costs, as listed in Table 17, were divided by the total square footage of assessable space of the Future Units, as listed in Table 18. Table 19 provides the Alternative No. 2 Fee that can be adopted by the School District.

**Table 19  
Alternative No. 2 Fee (2018\$)**

<b>Item</b>	<b>Amount/Square Footage</b>
Net Alternative No. 2 Fee School Facility Costs	\$18,561,252
Total Residential Square Footage	4,480,646
<b>Alternative No. 2 Fee</b>	<b>\$4.14</b>

## VI. ALTERNATIVE NO. 3 FEE

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

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

Pursuant to Section 65995.7, the Alternative No. 3 Fee School Facility Cost, which is the maximum amount of school facility costs that may be included in the Alternative No. 3 Fee, is calculated by increasing the Net Alternative No. 2 Fee School Facility Costs by an amount not to exceed the Alternative No. 2 Fee School Facility Costs. As required by Section 65995.7, this amount has been reduced by the amount of local funds (\$0 in the case of the School District) identified pursuant to Section 65995.5(c)(2). Accordingly, Table 20 shows the Net Alternative No. 2 Fee School Facility Costs previously shown in Table 17 and adds to that amount the Alternative No. 2 Fee School Facility Costs previously shown in Table 167. The result, shown in Table 20, is the Alternative No. 3 Fee School Facility Costs.

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

<b>Item</b>	<b>Amounts</b>
Net Alternative No. 2 Fee School Facility Costs	\$18,561,252
Alternative No. 2 Fee School Facility Costs	\$18,561,252
<b>Alternative No. 3 Fee School Facility Costs</b>	<b>\$37,122,504</b>

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

To calculate the Alternative No. 3 Fee, the Alternative No. 3 Fee School Facility Costs were divided by the total square footage of assessable space of the Future Units listed in Table 18. This calculation is required by Section 65995.5(c)(3) and outlined in Section V.C. of the Analysis. Table 21 provides the Alternative No. 3 Fee that can be levied by the School District on new residential development where permitted by applicable law.

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

<b>Item</b>	<b>Amount/Square Footage</b>
Alternative No. 3 Fee School Facility Costs	\$37,122,504
Total Residential Square Footage	4,480,646
<b>Alternative No. 3 Fee</b>	<b>\$8.29</b>

## VII. SECTION 66000 OF THE GOVERNMENT CODE

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

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

New residential development in the School District, as shown in the Analysis, will generate additional students who will require the School District to provide additional school facilities. The amount to be included in the Alternative Fees is specified by statute. The Alternative No. 2 Fee of \$4.14 per square foot and the Alternative No. 3 Fee of \$8.29 per square foot are justified in the Analysis. The estimated average school facilities cost impacts on the School District per square foot of residential development as estimated in Exhibit D is \$25.48. As the actual school facilities cost impacts per square foot of residential construction is greater than the Alternative Fees, it is reasonable for the School District to determine that the Alternative No. 2 Fee of \$4.14 per square foot and the Alternative No. 3 Fee of \$8.29 per square foot are roughly proportional and reasonably related to the actual impacts caused by residential development on the School District.

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

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

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**EXHIBIT A**

**Updated SAB Form 50-01**

SCHOOL DISTRICT Long Beach Unified School District	FIVE DIGIT DISTRICT CODE NUMBER (see California Public School Directory) 64725
COUNTY Los Angeles	HIGH SCHOOL ATTENDANCE AREA (HSAA) OR SUPER HSAA (if applicable)

Check one:  Fifth-Year Enrollment Projection  Tenth-Year Enrollment Projection  
 HSAA Districts Only - Check one:  Attendance  Residency  
 Residency - COS Districts Only - (Fifth Year Projection Only)

<input type="checkbox"/> Modified Weighting (Fifth-Year Projection Only)	3rd Prev. to 2nd Prev.	2nd Prev. to Prev.	Previous to Current
<input type="checkbox"/> Alternate Weighting - (Fill in boxes to the right):			

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

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

Part A. K-12 Pupil Data

Grade	7th Prev.	6th Prev.	5th Prev.	4th Prev.	3rd Prev.	2nd Prev.	Previous	Current
	2005 / 2006	2006 / 2007	2007 / 2008	2008 / 2009	2009 / 2010	2010 / 2011	2011 / 2012	2012 / 2013
K	6461	6066	6117	5934	6353	6191	6234	6366
1	6887	6561	6161	6244	6237	6199	6252	6062
2	6825	6503	6303	6109	6159	6163	6174	6003
3	7118	6720	6455	6351	6126	6154	6037	6089
4	6987	6723	6404	6335	6233	6034	5995	5846
5	7203	6751	6647	6391	6235	6064	5891	5784
6	7144	6980	6487	6501	6145	6041	5923	5785
7	7386	6958	6717	6484	6399	6124	5971	5829
8	7252	7081	6753	6703	6538	6292	6049	5922
9	7444	7336	7197	7073	6865	6696	6545	6233
10	7311	7049	6970	7028	6794	6637	6509	6322
11	6384	6600	6453	6567	6561	6342	6199	6192
12	6200	5774	6261	6242	6450	6333	6273	6372
<b>TOTAL</b>	<b>90602</b>	<b>87102</b>	<b>84925</b>	<b>83962</b>	<b>83095</b>	<b>81270</b>	<b>80052</b>	<b>78805</b>

Part I. Projected Enrollment  
 1. Fifth-Year Projection  
 Enrollment/Residency - (except Special Day Class pupils)

K-6	7-8	9-12	TOTAL

Special Day Class pupils only - Enrollment/Residency

	Elementary	Secondary	TOTAL
Non-Severe			
Severe			
<b>TOTAL</b>			

2. Tenth-Year Projection  
 Enrollment/Residency - (except Special Day Class pupils)

K-6	7-8	9-12	TOTAL
44928	11420	21211	<b>77559</b>

Special Day Class pupils only - Enrollment/Residency

	Elementary	Secondary	TOTAL
Non-Severe	684	933	<b>1617</b>
Severe	1035	1070	<b>2105</b>
<b>TOTAL</b>	<b>1719</b>	<b>2003</b>	

Part B. Pupils Attending Schools Chartered By Another District

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

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

Grade	7th Prev.	6th Prev.	5th Prev.	4th Prev.	3rd Prev.	2nd Prev.	Previous	Current
9	18	0	0	0	0	170	0	0
10	19	0	1	0	0	113	0	0
11	54	199	122	115	112	115	131	93
12	76	135	152	220	231	103	198	246
<b>TOTAL</b>	<b>167</b>	<b>334</b>	<b>275</b>	<b>335</b>	<b>343</b>	<b>501</b>	<b>329</b>	<b>339</b>

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

	Elementary	Secondary	TOTAL
Non-Severe	638	1064	<b>1702</b>
Severe	966	1220	<b>2186</b>
<b>TOTAL</b>	<b>1604</b>	<b>2284</b>	

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

7th Prev.	6th Prev.	5th Prev.	4th Prev.	3rd Prev.	2nd Prev.	Previous	Current
2005 / 2006	2006 / 2007	2007 / 2008	2008 / 2009	2009 / 2010	2010 / 2011	2011 / 2012	2012 / 2013

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

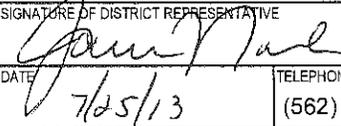
County Birth Data  Birth Data by District ZIP Codes  Estimate  Estimate  Estimate

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

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

- I am designated as an authorized district representative by the governing board of the district.
- If the district is requesting an augmentation in the enrollment projection pursuant to Regulation Section 1659.42.1 (a), the local planning commission or approval authority has approved the tentative subdivision map used for augmentation of the enrollment and the district has identified dwelling units in that map to be contracted. All subdivision maps used for augmentation of enrollment are available at the district for review by the Office of Public School Construction (OPSC).
- This form is an exact duplicate (verbatim) of the form provided by the Office of Public School Construction. In the event a conflict should exist, then the language in the OPSC form will prevail.

NAME OF DISTRICT REPRESENTATIVE (PRINT OR TYPE)  
 James Novak

SIGNATURE OF DISTRICT REPRESENTATIVE  


DATE  
 7/25/13

TELEPHONE NUMBER  
 (562) 997-8189

E-MAIL ADDRESS  
 janovak@lbschools.net

**EXHIBIT B**

**Updated SAB Form 50-02**

STATE OF CALIFORNIA  
**EXISTING SCHOOL BUILDING CAPACITY**  
 SAB 50-02 (Rev. 07/01) Excl (Rev. 08/15/2000)

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

SCHOOL DISTRICT: **LONG BEACH UNIFIED**  
 CITY: **LOS ANGELES**  
 PUBLIC DIGIT DISTRICT CODE NUMBER (see California Public School Directory): **64725**  
 HIGH SCHOOL ATTENDANCE AREA (if applicable):

**PART I - Classroom Inventory**     NEW     ADJUSTED

	K-5	6-8	9-12	Non-Severe	Severe	Total
Line 1. Leased State Relocatable Classrooms	79	1	50			130
Line 2. Portable Classrooms leased less than 5 years	453	83	58			594
Line 3. Interim Housing Portables leased less than 5 years						
Line 4. Interim Housing Portables leased at least 5 years						
Line 5. Portable Classrooms leased at least 5 years	54	9	35			98
Line 6. Portable Classrooms owned by district	322	63	55			440
Line 7. Permanent Classrooms	1,284	371	599	100	92	2,446
Line 8. Total (Lines 1 through 7)	2,192	527	797	100	92	3,708

**PART II - Available Classrooms**

**Option A:**

	K-5	6-8	9-12	Non-Severe	Severe	Total
a. Part I, line 4						
b. Part I, line 5	54	9	35			98
c. Part I, line 6	322	63	55			440
d. Part I, line 7	1,284	371	599	100	92	2,446
e. Total (a, b, c, & d)	1,660	443	689	100	92	2,984

**Option B:**

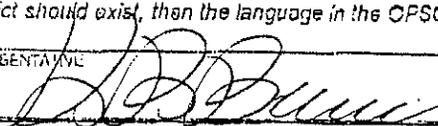
	K-5	6-8	9-12	Non-Severe	Severe	Total
a. Part I, line 8	2,192	527	797	100	92	3,708
b. Part I, lines 1, 2, 5 and 6 (total only)						1,262
c. 25 percent of Part I, line 7 (total only)						612
d. Subtract c from b (enter 0 if negative)	468	80	102			650
e. Total (a minus d)	1,724	447	695	100	92	3,058

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

	K-5	6-8	9-12	Non-Severe	Severe
Line 1. Classroom capacity	41,500	11,961	18,503	1,300	828
Line 2. SER adjustment					
Line 3. Operational Grants					
Line 4. Greater of line 2 or 3					
Line 5. Total of lines 1 and 4	41,500	11,961	18,503	1,300	828

I certify, as the District Representative, that the information reported on this form is true and correct and that I am designated as an authorized district representative by the governing board of the district; and, This form is an exact duplicate (verbatim) of the form provided by the Office of Public School Construction (OPSC). In the event a conflict should exist, then the language in the OPSC form will prevail.

SIGNATURE OF DISTRICT REPRESENTATIVE



DATE

12/28/00

**EXHIBIT C**

**Updated SAB Form 50-03**

STATE OF CALIFORNIA  
**ELIGIBILITY DETERMINATION**

STATE ALLOCATION BOARD

OFFICE OF PUBLIC SCHOOL CONSTRUCTION

Page 4 of 4

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

SCHOOL DISTRICT <b>LONG BEACH UNIFIED</b>	FIVE DIGIT DISTRICT CODE NUMBER (see California Public School Directory) <b>64725</b>
PHYSICAL ADDRESS <b>2425 Webster Ave.</b>	HIGH SCHOOL ATTENDANCE AREA (if applicable)
CITY <b>Long Beach, CA 90810</b>	COUNTY <b>LOS ANGELES</b>

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

DISTRICT REPRESENTATIVE	TELEPHONE NUMBER	E-MAIL ADDRESS
Kevin Barre	562-595-9574	
DISTRICT REPRESENTATIVE	TELEPHONE NUMBER	E-MAIL ADDRESS
Lisa Dutra	562-595-9574	

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

	K-6	7-8	9-12	Non-Severe	Severe
1. Projected Enrollment (Part G, Form SAB 50-01)	53,229	16,199	30,322	1,300	1,035
2. Existing School Building Capacity (Part III, line 5 of Form SAB 50-02)	41,500	11,961	18,603	1,300	828
3. New Construction Baseline Eligibility (line 1 minus line 2)	11,729	4,238	11,719		207

**Part III - Modernization Eligibility**  NEW  ADJUSTED

1. SCHOOL NAME:

Option A

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

Option B

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

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

I certify, as the District Representative, that the information reported on this form is true and correct and that:  
 I am designated as an authorized district representative by the governing board of the district; and  
 A resolution or other appropriate documentation supporting this application under Chapter 12.5, Part 10, Division 1,  
 commencing with Section 17070.10, et seq., of the Education Code was adopted by the School District's Governing Board  
 on May 18, 1999; and

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

SIGNATURE OF DISTRICT REPRESENTATIVE: [Signature] DATE: 12/28/00

**EXHIBIT D**

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

**LONG BEACH UNIFIED SCHOOL DISTRICT**

**School Facility Cost Impacts per Residential Square Foot**

February 2018

**School Facility Costs**

School Level	Site Acquisition Cost	Facility Construction	Total Cost
Elementary School	\$28,273,272	\$37,781,309	\$66,054,581
Middle School	\$38,640,138	\$50,604,653	\$89,244,791
High School	\$66,206,579	\$57,699,030	\$123,905,609

**Costs per Student**

School Level	Total Cost	Students Housed	Cost per Student
Elementary School	\$66,054,581	800	\$82,568
Middle School	\$89,244,791	850	\$104,994
High School	\$123,905,609	800	\$154,882

**School Facility Cost Impacts per Residential Unit**

School Level	Cost per Student	Weighted Average SGR	Cost per Unit
Elementary School	\$82,568	0.0657	\$5,426
Middle School	\$104,994	0.0326	\$3,428
High School	\$154,882	0.0971	\$15,041
<b>Total School Facility Cost Impact</b>			<b>\$23,895</b>
Average Square Footage <sup>[1]</sup>			938
<b>School Facility Cost Impact per Square Foot</b>			<b>\$25.48</b>

[1] See Table 18 of the Analysis.

**LONG BEACH UNIFIED SCHOOL DISTRICT**

**Summary of Estimated Costs**

**Elementary School**

February 2018

<b>A. Site</b>			<b>\$28,313,272</b>
	Purchase Price of Property		\$28,273,272
	Acres <sup>[1]</sup> :	12	
	Cost/Acre:	\$2,356,106	
	EIR		\$20,000
	Appraisals		\$10,000
	Surveys		\$5,000
	Escrow/Title		\$5,000
	<i>[1] Assumes Net Usable Acres.</i>		
<b>B. Plans</b>			<b>\$1,989,500</b>
	Architect's Fee		\$1,787,500
	Preliminary Tests		\$20,000
	DSA/SDE Plan Check		\$162,000
	Energy Fee Analysis		\$15,000
	Other		\$5,000
<b>C. Construction</b>			<b>\$32,000,000</b>
	(Includes Construction, Site Development, General Site Development, and Technology)		
	Square Feet / Student	100	
	Cost / Square Feet	\$400	
<b>D. Tests</b>			<b>\$50,000</b>
<b>E. Inspection</b>			<b>\$144,000</b>
	(\$12,000 per month for 12 months)		
<b>F. Furniture and Equipment</b>			<b>\$664,000</b>
	(\$5 per Square Foot, includes Cost Index Adjustment of 66%)		
<b>G. Contingency</b>			<b>\$949,412</b>
	(\$2,000 + 1.5% of items A-F)		
<b>H. Items Not Funded by the State</b>			<b>\$1,944,397</b>
	Technology (5% of Construction)		\$1,600,000
	Library Books (8 books/student @ \$15)		\$96,000
	Landscaping (\$0.44/sq. ft x 12 acres)		\$229,997
	Landscape Architect Fees (8% of Landscaping)		\$18,400
<b>I. Total Estimated Cost</b>			<b>\$66,054,581</b>

Summary	
School Facilities Capacity - Traditional Calendar	800
School Facilities Cost per Student - Traditional Calendar	\$82,568

**LONG BEACH UNIFIED SCHOOL DISTRICT**

**Summary of Estimated Costs**

**Middle School**

**February 2018**

<b>A. Site</b>			<b>\$38,695,138</b>
	Purchase Price of Property		\$38,640,138
	Acres <sup>[1]</sup> :	16.4	
	Cost/Acre:	\$2,356,106	
	EIR		\$25,000
	Appraisals		\$12,000
	Surveys		\$8,000
	Escrow/Title		\$10,000
	<i>[1] Assumes Net Usable Acres.</i>		
<b>B. Plans</b>			<b>\$2,604,500</b>
	Architect's Fee		\$2,312,500
	Preliminary Tests		\$45,000
	DSA/SDE Plan Check		\$214,500
	Energy Fee Analysis		\$25,000
	Other		\$7,500
<b>C. Construction</b>			<b>\$42,500,000</b>
	(Includes Construction, Site Development, General Site Development, and Technology)		
	Square Feet / Student	125	
	Cost / Square Feet	\$400	
<b>D. Tests</b>			<b>\$180,000</b>
<b>E. Inspection</b>			<b>\$324,000</b>
	(\$12,000 per month for 18 months x 1.5 inspectors)		
<b>F. Furniture and Equipment</b>			<b>\$1,058,250</b>
	(\$6 per Square Foot, includes Cost Index Adjustment of 66%)		
<b>G. Contingency</b>			<b>\$1,282,428</b>
	(\$2,000 + 1.5% of items A-F)		
<b>H. Items Not Funded by the State</b>			<b>\$2,600,475</b>
	Technology (5% of Construction)		\$2,125,000
	Library Books (8 books/student @ \$20)		\$136,000
	Landscaping (\$0.44/sq. ft. x 16.4 acres)		\$314,329
	Landscape Architect Fees (8% of Landscaping)		\$25,146
<b>I. Total Estimated Cost</b>			<b>\$89,244,791</b>

Summary	
School Facilities Capacity - Traditional Calendar	850
School Facilities Cost per Student - Traditional Calendar	\$104,994

**LONG BEACH UNIFIED SCHOOL DISTRICT**

**Summary of Estimated Costs**

High School

February 2018

<b>A. Site</b>			<b>\$66,283,579</b>
	Purchase Price of Property		\$66,206,579
	Acres <sup>[1]</sup> :	28.1	
	Cost/Acre :	\$2,356,106	
	EIR		\$35,000
	Appraisals		\$15,000
	Surveys		\$12,000
	Escrow/Title		\$15,000
	<i>[1] Assumes Net Usable Acres.</i>		
<b>B. Plans</b>			<b>\$2,917,500</b>
	Architect's Fee		\$2,567,500
	Preliminary Tests		\$70,000
	DSA/SDE Plan Check		\$240,000
	Energy Fee Analysis		\$30,000
	Other		\$10,000
<b>C. Construction</b>			<b>\$47,600,000</b>
	(Includes Construction, Site Development, General Site Development, and Technology)		
	Square Feet / Student	140	
	Cost / Square Feet	\$425	
<b>D. Tests</b>			<b>\$350,000</b>
<b>E. Inspection</b>			<b>\$576,000</b>
	(\$12,000/month x 24 months x 2 inspectors)		
<b>F. Furniture and Equipment</b>			<b>\$1,301,440</b>
	(\$7 per Square Foot, includes Cost Index Adjustment of 66%)		
<b>G. Contingency</b>			<b>\$1,787,428</b>
	(\$2,000 + 1.5% of items A-F)		
<b>H. Items Not Funded by the State</b>			<b>\$3,089,662</b>
	Technology (5% of Construction)		\$2,380,000
	Library Books (8 books/student @ \$20)		\$128,000
	Landscaping (\$0.44/sq. ft. x 28.1 acres)		\$538,576
	Landscape Architect Fees (8% of Landscaping)		\$43,086
<b>I. Total Estimated Cost</b>			<b>\$123,905,609</b>

Summary	
School Facilities Capacity - Traditional Calendar	800
School Facilities Cost per Student - Traditional Calendar	\$154,882

**EXHIBIT E**

**Information on Measure E**



Get the facts before you vote.

Brought to you by



en Español



## November 8, 2016 — California General Election Ballot and voting information for Los Angeles County.

This is an archive of a past election.



Candidates

Measures

Voting Info

My List (0%)

0 of 186



Long Beach Unified School District  
Measure E Bond Measure - 55% Approval Required

Share This Page



Back

Next

### Election Results

✓ Passed

129,757 votes yes (74.86%)

43,584 votes no (25.14%)

★ 100% of precincts reporting (288/288).

Add choice to my list.

✓ Yes ✗ No

On your actual ballot, you can vote 'yes' or 'no' on this measure.

To improve outdated classrooms/neighborhood schools by: improving technology/labs/career education classrooms/electrical /wiring; upgrading handicapped accessibility/earthquake safety; upgrading bathrooms, fire alarms/sprinklers/security cameras; removing lead paint/asbestos; installing air conditioning; improving student health/physical education; repairing/constructing/acquiring facilities/equipment, shall Long Beach Unified School District issue \$1,500,000,000 in bonds, at legal rates, requiring independent audits, citizens' oversight, no money for administrators' salaries/pensions; and all funds used locally?

### What is this proposal?

Here is some helpful information about this ballot measure from trusted sources.

+ Measure Details — Official information about this measure

**EXHIBIT F**

**Bonding Capacity Calculation**

## LONG BEACH UNIFIED SCHOOL DISTRICT

### Bonding Capacity Calculation

Fiscal Year 2017/2018

	Description	Value
(1)	Taxable property of the district including all unitary and operating non-unitary property for the 2017/2018 equalized roll <sup>[1]</sup> .	\$62,509,539,038
(2)	Enter applicable percentage bond debt limit Ed. Code Section 15102 (School District) 1.25% Ed. Code Section 15106 (Unified School District) 2.5%	2.50%
(3)	Bonding capacity	\$1,562,738,476
(4)	Senate Bill 50 local bonding capacity threshold 15% of District's local bonding capacity	\$234,410,771
(5)	Senate Bill 50 local bonding capacity threshold 30% of District's local bonding capacity	\$468,821,543

[1] Source: Los Angeles County Office of the Auditor-Controller

**EXHIBIT G**

**Correspondence with the Cities**



# COOPERATIVE STRATEGIES

COMPLETE FINANCIAL & DEMOGRAPHIC PLANNING FOR EDUCATION

December 21, 2017

Ms. Amanda Cook  
Planning Director  
City of Avalon  
410 Avalon Canyon Road  
Avalon, CA 90704

**Re: Residential Development Projections within Long Beach Unified School District Boundaries**

Dear Ms. Cook,

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

Projections regarding the Future Units to be constructed within the area of the City served by the School District are shown on the following page. Based on information obtained from the City and the School District, Cooperative Strategies has prepared Future Unit estimates and Future Unit square footage estimates for the School District. Cooperative Strategies would like to provide the City with the opportunity to review, and if necessary, modify these projections. Please complete the attached page ("Certificate") and return to Cooperative Strategies by **January 15, 2018.**

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

Sincerely,

Andrew Bishop  
Senior Associate Director

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

\_\_\_The City concurs with the previous residential development projections as provided below:

Unit Type	Projected Number of Units <sup>[1]</sup>	Estimated Average Square Footage per Unit
Single Family Detached <i>(i.e. single family home)</i>	10	1,500
Single Family Attached <i>(e.g. condos, duplexes, townhomes, etc.)</i>	0	N/A
Multifamily <i>(i.e. apartments)</i>	40	1,000

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

\_\_\_The residential development projected by the City is listed below:

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

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

Signed, \_\_\_\_\_, of the City of Avalon on \_\_\_\_\_.

Printed Name: \_\_\_\_\_  
Title: \_\_\_\_\_



# COOPERATIVE STRATEGIES

COMPLETE FINANCIAL & DEMOGRAPHIC PLANNING FOR EDUCATION

December 21, 2017

Mr. Didier Murillo  
Planning Technician  
City of Lakewood  
5050 Clark Avenue  
Lakewood, CA 90712

**Re: Residential Development Projections within Long Beach Unified School District Boundaries**

Dear Mr. Murillo,

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

Projections regarding the Future Units to be constructed within the area of the City served by the School District are shown on the following page. Based on information obtained from the City and the School District, Cooperative Strategies has prepared Future Unit estimates and Future Unit square footage estimates for the School District. Cooperative Strategies would like to provide the City with the opportunity to review, and if necessary, modify these projections. Please complete the attached page ("Certificate") and return to Cooperative Strategies by **January 15, 2018.**

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

Sincerely,

Andrew Bishop  
Senior Associate Director

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

\_\_\_The City concurs with the previous residential development projections as provided below:

Unit Type	Projected Number of Units <sup>[1]</sup>	Estimated Average Square Footage per Unit
Single Family Detached <i>(i.e. single family home)</i>	3	2,360
Single Family Attached <i>(e.g. condos, duplexes, townhomes, etc.)</i>	0	N/A
Multifamily <i>(i.e. apartments)</i>	0	N/A

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

\_\_\_The residential development projected by the City is listed below:

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

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

Signed, \_\_\_\_\_, of the City of Lakewood on \_\_\_\_\_.

Printed Name: \_\_\_\_\_  
 Title: \_\_\_\_\_



# COOPERATIVE STRATEGIES

COMPLETE FINANCIAL & DEMOGRAPHIC PLANNING FOR EDUCATION

December 21, 2017

Ms. Linda Tatum  
AICP Planning Bureau Manager  
City of Long Beach  
333 W. Ocean Boulevard 3<sup>rd</sup> Floor  
Long Beach, CA 90802

**Re: Residential Development Projections within Long Beach Unified School District Boundaries**

Dear Ms. Tatum,

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

Projections regarding the Future Units to be constructed within the area of the City served by the School District are shown on the following page. Based on information obtained from the City and the School District, Cooperative Strategies has prepared Future Unit estimates and Future Unit square footage estimates for the School District. Cooperative Strategies would like to provide the City with the opportunity to review, and if necessary, modify these projections. Please complete the attached page ("Certificate") and return to Cooperative Strategies by **January 15, 2018.**

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

Sincerely,

Andrew Bishop  
Senior Associate Director

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

\_\_\_The City concurs with the previous residential development projections as provided below:

Unit Type	Projected Number of Units <sup>[1]</sup>	Estimated Average Square Footage per Unit
Single Family Detached (i.e. single family home)	70	2,500
Single Family Attached (e.g. condos, duplexes, townhomes, etc.)	380	1,500
Multifamily (i.e. apartments)	675	1,000

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

The residential development projected by the City is listed below: (5 years)

Unit Type	Projected Number of Units <sup>[1]</sup>	Estimated Average Square Footage per Unit
Single Family Detached (i.e. single family home)	500	1,100
Single Family Attached (e.g. condos, duplexes, townhomes, etc.)	400	1,000
Multifamily (i.e. apartments)	3,600	900

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

Signed, Christopher Koontz, of the City of Long Beach on 1/17/18.

Printed Name: Christopher Koontz  
 Title: Advance Planning Officer



# COOPERATIVE STRATEGIES

COMPLETE FINANCIAL & DEMOGRAPHIC PLANNING FOR EDUCATION

December 21, 2017

Mr. Scott Charney  
Director of Community Development  
City of Signal Hill  
2175 Cherry Ave  
Signal Hill, CA 90755

**Re: Residential Development Projections within Long Beach Unified School District Boundaries**

Dear Mr. Charney,

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

Projections regarding the Future Units to be constructed within the area of the City served by the School District are shown on the following page. Based on information obtained from the City and the School District, Cooperative Strategies has prepared Future Unit estimates and Future Unit square footage estimates for the School District. Cooperative Strategies would like to provide the City with the opportunity to review, and if necessary, modify these projections. Please complete the attached page ("Certificate") and return to Cooperative Strategies by **January 15, 2018.**

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

Sincerely,

Andrew Bishop  
Senior Associate Director

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

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

Unit Type	Projected Number of Units <sup>[1]</sup>	Estimated Average Square Footage per Unit
Single Family Detached <i>(i.e. single family home)</i>	45	<del>2,000</del> 2,012
Single Family Attached <i>(e.g. condos, duplexes, townhomes, etc.)</i>	<del>10</del> 4	<del>1,725</del> 1,732
Multifamily <i>(i.e. apartments)</i>	0	N/A

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

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

Unit Type	Projected Number of Units <sup>[1]</sup>	Estimated Average Square Footage per Unit
Single Family Detached <i>(i.e. single family home)</i>	15	2,890 ✕
Single Family Attached <i>(e.g. condos, duplexes, townhomes, etc.)</i>	11	1,600 ✕
Multifamily <i>(i.e. apartments)</i>	199	840 ✕

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

Signed,  of the City of Signal Hill on 1/12/18.

Printed Name: SCOTT CHARNEY  
Title: DIRECTOR

2018 RESIDENTIAL PROJECTIONS

Unit Type	Projected Number of Units	Estimated Average Square Footage per Unit
Single Family Detached <i>(i.e. single family home)</i>	15	2,890 sq. ft.
Single Family Attached <i>(e.g. condos, duplexes, townhomes, etc.)</i>	11	1,600 sq. ft.
Multifamily <i>(i.e. apartments)</i>	199	840 sq. ft.

CALCULATIONS

Single Family Detached	
Name	Quantity
Courtyard	5
PCH Molino	3
Walnut Ave Infill Vacant Lot	1
1900 Temple SFD	1
Heritage Square	4
MISC.	1
<b>TOTAL</b>	<b>15</b>

Single Family Attached	
Name	Quantity
Courtyard	4
PCH Molino	4
Bekele Duplex Conversion (2179 Temple Ave.)	1
2250 Ohio Ave.	2
<b>TOTAL</b>	<b>11</b>

Multifamily	
Name	Quantity
Heritage Square	199
<b>TOTAL</b>	<b>199</b>

**\*\*NOTE:** For these projections, the unit of measure is permits EXPECTED to be issued. (NOT Certificate of Occupancy)

**EXHIBIT H**

**Reconstruction**

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

**A. Residential Reconstruction**

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

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

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

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

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

**EXHIBIT I**

**Updated School Facilities Capacity Calculation**

**LONG BEACH UNIFIED SCHOOL DISTRICT****School Facilities Capacity Calculation**

<b>Application</b>	<b>Item</b>	<b>Elementary School</b>	<b>Middle School</b>	<b>High School</b>
N/A	SAB Form 50-02	41,500	11,961	18,603
N/A	Non-Severe/Severe Capacity	1,146	327	655
50/64725-00-001	California Academy of Mathematics	0	0	368
50/64725-00-002	Jordan Senior High Annex	0	0	710
53/64725-00-002	GTE Middle School	0	810	0
50/64725-00-003	Edison Elementary	387	0	0
50/64725-00-004	Lee Elementary	345	0	0
50/64725-00-005	Monroe Elementary	0	258	0
50/64725-00-006	Wilson Senior High	0	0	107
50/64725-00-007	Tincher Elementary	0	86	0
50/64725-00-008	Cabrillo (Juan Rodriguez) High	0	0	702
50/64725-00-009	New Elementary School (Dooley Site )	0	0	1,375
50/64725-00-010	Franklin Junior High	0	178	0
50/64725-00-011	Broadway-Golden Elementary (Chavez)	1,087	0	0
50/64725-00-012	Sutter Elementary (Perry MS)	314	0	0
50/64725-00-013	Colin Powell Academy for Success	0	156	162
50/64725-00-014	Cabrillo High	0	0	25
50/64725-00-015	California Academy of Mathematics	0	0	243
	Browning High School			800
<b>Total Capacity</b>	<b>N/A</b>	<b>44,779</b>	<b>13,776</b>	<b>23,750</b>

**EXHIBIT J**

**Allocation of Surplus Seats**

**LONG BEACH UNIFIED SCHOOL DISTRICT**

**Allocation of Surplus Seats**

**Actual and Projected Surplus School Seats from Existing Units**

Item	School Year 2017/2018
Actual Elementary School Students	40,139
Existing Elementary School Facilities Capacity	44,779
<b>Excess Elementary School Seats</b>	<b>4,640</b>
Actual Middle School Students	11,273
Existing Middle School Facilities Capacity	13,776
<b>Excess Middle School Seats</b>	<b>2,503</b>
Actual High School Students	23,164
Existing High School Facilities Capacity	23,750
<b>Excess High School Seats</b>	<b>586</b>

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

Item	Number of Future Units	Number of Total Units <sup>[1]</sup>
Number of SFD Units	528	6,486
Number of SFA Units	411	1,871
Number of MF Units	3,839	8,263
[1] Source: Southern California Association of Governments ("SCAG")		

**Percent of Students Generated from Future Units**

Item	Students Generated from Future Units	Students Generated from Total Units
Elementary School Students from SFD Units	85	1,045
Elementary School Students from SFA Units	33	148
Elementary School Students from MF Units	196	422
<b>Total Elementary School Students Generated</b>	<b>314</b>	<b>1,615</b>
Middle School Students from SFD Units	60	740
Middle School Students from SFA Units	12	56
Middle School Students from MF Units	84	181
<b>Total Middle School Students Generated</b>	<b>156</b>	<b>977</b>
High School Students from SFD Units	60	740
High School Students from SFA Units	12	56
High School Students from MF Units	392	844
<b>Total High School Students Generated</b>	<b>464</b>	<b>1,640</b>
<b>Percent of Elementary School Students Generated from Future Units</b>		<b>19.44%</b>
<b>Percent of Middle School Students Generated from Future Units</b>		<b>15.97%</b>
<b>Percent of High School Students Generated from Future Units</b>		<b>28.29%</b>

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

School Level	Excess Seats	% of Students Generated from Future Units
Elementary School	4,640	19.44%
Middle School	2,503	15.97%
High School	586	28.29%
<b>Excess Elementary School Seats Allocated Students Generated from Future Units</b>		<b>902</b>
<b>Excess Middle School Seats Allocated Students Generated from Future Units</b>		<b>400</b>
<b>Excess High School Seats Allocated Students Generated from Future Units</b>		<b>166</b>

**EXHIBIT K**

**Surplus Site Determination**

Section 65995.6(b)(1) requires the School District to identify and consider any surplus property owned by the School District that may be used as a school site or that is available for sale to finance school facilities. The School District has identified two (2) sites that may fall into this category.

1. **999 Atlantic Avenue Site**

The 999 Atlantic Avenue Site is a 0.34 acre site that previously housed School District offices and other School District services. Based on information provided by the School District, the value of this site is estimated to be \$3,505,000.

2. **4310 Long Beach Boulevard Site**

The 4310 Long Beach Boulevard Site is a 0.36 acre site that previously housed various School District service programs. Based on information provided by the School District, the value of this site is estimated to be \$3,117,000.

Therefore, the value of these surplus sites could be used to offset the impact of Future Units. This potential funding will be discussed further in Exhibit L.

**EXHIBIT L**

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

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

**1. Lease Financings**

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

Over the last several years the School District, as an interim source of capital facilities funding, has issued COPs. The proceeds of these COPs have been expended on various capital improvement projects, all of which are reflected in the facilities capacity calculation. On November 29, 2001, the School District issued \$74,010,000 in COPs to defease Series A, B, and D COPs issued in 1997, 1998, and 1999 respectively. Additionally, these COPs were used to finance the acquisition, construction and modernization of school facilities and equipping capital improvements. Therefore, no funding exists from this source to affect the impact of future residential development.

**2. General Obligation Bonds**

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

On November 4, 2008, the voters of the School District approved Measure K, which authorized the issuance of \$1,200,000,000 in GO bonds. In Fiscal Year 2009/2010 the School District issued Series A in the amount of \$250,000,000, in Fiscal Year 2010/2011 the School District issued Series B in the amount of \$75,426,686, in Fiscal

Year 2012/2013 the School District issued Series C in the amount of \$50,000,000, in Fiscal Year 2014/2015 the School District issued Series D and Series D-1 in the cumulative amount of \$269,998,410.45, and in Fiscal Year 2016/2017 the School District issued Series E in the amount of \$150,000,000.

On November 8, 2016, the voters of the School District approved Measure E, which authorized the issuance of \$1,500,000,000 in GO Bonds. In Fiscal Year 2016/2017, the School District issued Series A in the amount of \$300,000,000.

Based on information provided by the School District, the remaining GO Bond proceeds from Measure K and Measure E will be utilized to repair and modernize the School District's existing School Facilities and are not available to offset the impact of Projected Unhoused Students from Future Units.

### **3. Redevelopment Pass-Throughs**

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

The School District does not currently have any pass-through agreements with any redevelopment agencies.

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

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

The School District has not formed any CFDs to date.

### **5. School Fees**

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

The School District currently collects such fees in the amount of \$0.56 per square foot. In the previous five (5) years, the School District collected approximately \$2,100,379 in School Fees from commercial/industrial development. A similar amount of commercial/industrial School Fees can be expected to be received over the following five (5) years. This potential funding will be discussed further below.

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

Over the next five (5) years, the School District will need to construct school facilities to house students to be generated from Future Units. Using per-student costs calculated in Exhibit D, providing adequate school facilities to the 298 Projected Unhoused Students identified in Section III.C will have a cost of \$46,154,836. Table L-1 shows a summary of the school facilities needs of the School District.

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

Item	Amount
Future Unhoused Student Impact	\$46,154,836

As stated above, the School District has identified the following local funds: (i) potential commercial/industrial school fees in the amount of \$2,100,379, and (ii) a potential value of surplus sites in the amount of \$6,622,000. In addition, the School District also plans to pursue State funding for the construction of school facilities to adequately house students generated from existing residential development and Future Units. Based on the current per-pupil grant amounts established by the State and the School District's site costs, the 298 Projected Unhoused Students would generate \$18,561,252 in State funding. Additionally, based on Table 16 of the Analysis, the School District can expect to receive \$18,561,252 from Alternative No. 2 Fees on new residential development. Table L-2 summarizes potential funding sources to fund the school facilities needs identified in Table L-1.

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

Item	Amount
Projected Commercial/Industrial School Fees	\$2,100,379
Potential Value of Surplus School Sites	\$6,622,000
State Funding for Projected Unhoused Students	\$18,561,252
Projected Alternative No. 2 Fees	\$18,561,252
<b>Total</b>	<b>\$45,844,883</b>

As shown in Table L-3, when considering the current and future school needs of the School District, there is currently a \$309,953 funding shortfall. Therefore, the School District does not have surplus funds available to offset the cost impact of Future Units.

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

<b>Item</b>	<b>Amount</b>
School Facilities Needs	\$46,154,836
Local Funding Sources	(\$45,844,883)
<b>Remaining Funding Shortfall</b>	<b>\$309,953</b>

**EXHIBIT M**

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

**LONG BEACH UNIFIED SCHOOL DISTRICT**

**Allocation of Surplus Seats**

**Actual and Projected Surplus School Seats from Existing Units**

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Actual Elementary School Students	40,139
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<b>Excess Elementary School Seats</b>	<b>4,640</b>
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**Allocation of Excess School Seats to Students Generated from Future Units**

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