

JANUARY 2024



# 2024 DEVELOPER FEE JUSTIFICATION STUDY FOR PIONEER UNION ELEMENTARY SCHOOL DISTRICT

MR. PAUL VAN LOON,  
*SUPERINTENDENT*

*PREPARED BY*

SCHOOLWORKS, INC.  
8700 Auburn Folsom Rd., #200  
Granite Bay, CA 95746

PHONE: (916) 733-0402  
[WWW.SCHOOLWORKSGIS.COM](http://WWW.SCHOOLWORKSGIS.COM)

## TABLE OF CONTENTS

<b>Executive Summary</b> .....	<b>1</b>
<b>Background</b> .....	<b>2</b>
<b>Purpose and Intent</b> .....	<b>3</b>
Burden Nexus .....	3
Cost Nexus .....	3
Benefit Nexus .....	3
<b>Enrollment and Impacts</b> .....	<b>4</b>
Student Generation Factor .....	5
New Residential Development Impacts .....	6
<b>Existing Facility Capacity</b> .....	<b>7</b>
Classroom Loading Standards.....	7
Existing Facility Capacity.....	8
Unhoused Students by State Housing Standards .....	9
<b>Calculation of Development's Fiscal Impact on Schools</b> .....	<b>10</b>
Reconstruction/Modernization Costs.....	10
Impact of Residential Development .....	11
Impact of Other Residential Development.....	12
Impact of Commercial/Industrial Development.....	12
Employees per Square Foot of Commercial Development .....	13
Students per Employee .....	13
School Facilities Cost per Student .....	14
Residential Offset .....	14
Net Cost per Square Foot .....	15
Verifying the Sufficiency of the Development Impact.....	15
<b>District Map</b> .....	<b>16</b>
<b>Conclusion</b> .....	<b>17</b>
Burden Nexus .....	17
Cost Nexus .....	17
Benefit Nexus .....	17

## Appendices

- **SAB 50-01 - Enrollment Certification/Projection**
- **Census Data**
- **Use of Developer Fees**
- **Site Development Costs**
- **Index Adjustment on the Assessment for Development – State Allocation Board Meeting of January 24, 2024**
- **Annual Adjustment to School Facility Program Grants**

## Executive Summary

This Developer Fee Justification Study demonstrates that the Pioneer Union Elementary School District requires its share of the full statutory impact fee to accommodate impacts from development activity.

A fee of \$4.79 per square foot for residential construction and a fee of \$0.78 per square foot for commercial/industrial construction is currently assessed on applicable permits pulled in the District. The new fee amounts are **\$5.17** per square foot for residential construction and **\$0.84\*** per square foot for commercial/industrial construction. This proposed increase represents \$0.38 per square foot and \$0.06 per square foot for residential and commercial/ industrial construction, respectively. The Districts share of the developer fees is 60%.

The following table shows the impacts of the new fee amounts:

**Table 1**  
**Pioneer Union Elementary SD**  
**Developer Fee Collection Rates**

<b>Totals</b>	<u>Previous</u>	<u>New</u>	<u>Change</u>
Residential	\$4.79	\$5.17	\$0.38
Commercial/Ind.	\$0.78	\$0.84	\$0.06
District Share:	60.00%		
<b>Net Impact</b>	<u>Previous</u>	<u>New</u>	<u>Change</u>
Residential	\$2.87	\$3.10	\$0.23
Commercial/Ind.	\$0.47	\$0.50	\$0.03

\*except for Rental Self Storage facilities in which a fee of \$0.10 per square foot is justified.

The total projected number of housing units to be built over the next five years is 485. The average area per unit is 1,934 square feet. This Study demonstrates a need of \$6.20 per square foot for residential construction.

## Background

Education Code Section 17620 allows school districts to assess fees on new residential and commercial construction within their respective boundaries. These fees can be collected without special city or county approval, to fund the construction of new school facilities necessitated by the impact of residential and commercial development activity. In addition, these fees can also be used to fund the reconstruction of school facilities to accommodate students generated from new development projects. Fees are collected immediately prior to the time of the issuance of a building permit by the City or the County.

As new development generates students, additional school facilities or modernization of existing facilities will be needed to house the new students. Because of the high cost associated with constructing school facilities and the District's limited budget, outside funding sources are required for future school construction. State and local funding sources for the construction and/or reconstruction of school facilities are limited.

The authority cited in Education Code Section 17620 states in part "... the governing board of any school district is authorized to levy a fee, charge, dedication or other form of requirement against any development project for the construction or reconstruction of school facilities." The legislation originally established the maximum fee rates at \$1.50 per square foot for residential construction and \$0.25 per square foot for commercial/industrial construction. Government Code Section 65995 provides for an inflationary increase in the fees every two years based on the changes in the Class B construction index. As a result of these adjustments, the fees authorized by Education Code 17620 are currently **\$5.17** per square foot of residential construction and **\$0.84** per square foot of commercial or industrial construction.

## **Purpose and Intent**

Prior to levying developer fees, a district must demonstrate and document that a reasonable relationship exists between the need for new or reconstructed school facilities and residential, commercial and industrial development. The justification for levying fees is required to address three basic links between the need for facilities and new development. These links or nexus are:

**Burden Nexus:** A district must identify the number of students anticipated to be generated by residential, commercial and industrial development. In addition, the district shall identify the school facility and cost impact of these students.

**Cost Nexus:** A district must demonstrate that the fees to be collected from residential, commercial and industrial development will not exceed the cost of providing school facilities for the students to be generated from the development.

**Benefit Nexus:** A district must show that the construction or reconstruction of school facilities to be funded by the collection of developer fees will benefit the students generated by residential, commercial and industrial development.

The purpose of this Study is to document if a reasonable relationship exists between residential, commercial and industrial development and the need for new and/or modernized facilities in the Pioneer Union Elementary School District.

Following in this Study will be figures indicating the current enrollment and the projected development occurring within the attendance boundaries of the Pioneer Union Elementary School District. The students generated will then be loaded into existing facilities to the extent of available space. Thereafter, the needed facilities will be determined and an estimated cost will be assigned. The cost of the facilities will then be compared to the area of residential, commercial and industrial development to determine the amount of developer fees justified.

### **Enrollment and Impacts**

In 2023/2024 the District's total enrollment (CBEDS) was 1,636 students. The enrollment by grade level is shown here in Table 2.

**Table 2**

**Pioneer Union Elementary SD**  
**CURRENT ENROLLMENT**

<b>Grade</b>	<b>2023/2024</b>
TK/K	237
1	143
2	162
3	174
4	196
5	166
6	160
TK-6 Total	1,238
7	198
8	200
7-8 Total	398
TK-8 Total	1,636

This data will be the basis for the enrollment impacts which will be presented later after a review of the development projections and the student generation factors.

#### Student Generation Factor

In determining the impact of new development, the District is required to show how many students will be generated from the new developments. In order to ensure that new development is paying only for the impact of those students that are being generated by new homes and businesses, the student generation factor is applied to the number of new housing units to determine development-related impacts.

The student generation factor identifies the number of students per housing unit and provides a link between residential construction projects and projections of enrollment. The State-wide factor used by the Office of Public School Construction is 0.50 for grades TK-8. For the purposes of this Study we will use the local factors to determine the students generated from new housing developments. This was done by comparing the number of housing units in the school district to the number of students in the school district as of the 2020 Census. Table 3 shows the student generation factors for the various grade groupings.

**Table 3**

#### **Pioneer Union Elementary SD STUDENT GENERATION FACTORS**

<u>Grades</u>	<u>Students per Household</u>
TK-6	0.28814
7-8	0.08857
<b>Total</b>	<b>0.3767</b>

When using the Census data to determine the average district student yield rate, it is not possible to determine which students were living in multi-family units versus single family units. Therefore, only the total average yield rate is shown. The Census data does indicate that 85.1% of the total housing units within the district boundaries are single family units. It is reasonable to assume that the construction of new housing units would be similar to the current housing stock, which was confirmed by the various planning departments within the school district boundaries, and therefore the overall student generation rate will be used to determine student yields from the projected developments.

#### New Residential Development Impacts

The Pioneer Union Elementary School District has experienced an average new residential construction rate of approximately 241 units per year over the past four years. This was determined by reviewing the residential permits pulled and school development impact fees paid to the District. After contacting the city planning department within the school district boundaries, it was determined that the residential construction rate over the next five years will average 97 units per year. Projecting the average rate forward, we would expect that 485 units of residential housing will be built within the District boundaries over the next five years.

To determine the impact of residential development, a student projection is done. Applying the student generation factor of 0.3767 to the projected 485 units of residential housing, we expect that 183 students will be generated from the new residential construction over the next five years. This includes 140 elementary school students and 43 middle school students.

The following table shows the projected impact of new development. The students generated by development will be utilized to determine the facility cost impacts to the school district.

**Table 4**

#### **Pioneer Union Elementary SD DEVELOPMENT IMPACT ANALYSIS**

<u>Grades</u>	Generation <u>Rate</u>	Students <u>Generated</u>
TK to 6	0.2881	140
7 to 8	0.0886	43
<b>Totals</b>	<b>0.3767</b>	<b>183</b>

### **Existing Facility Capacity**

To determine the need for additional school facilities, the capacity of the existing facilities must be identified and compared to current and anticipated enrollments. The District's existing building capacity will be calculated using the State classroom loading standards shown in Table 6. The following types of "support-spaces" necessary for the conduct of the District's comprehensive educational program, are not included as "teaching stations," commonly known as "classrooms" to the public:

**Table 5**  
**List of Core and Support Facilities**

Library	Resource Specialist
Multipurpose Room	Gymnasium
Office Area	Lunch Room
Staff Workroom	P.E. Facilities

Because the District requires these types of support facilities as part of its existing facility and curriculum standards at its schools, new development's impact must not materially or adversely affect the continuance of these standards. Therefore, new development cannot require that the District house students in these integral support spaces.

#### **Classroom Loading Standards**

The following maximum classroom loading-factors are used to determine teaching-station "capacity," in accordance with the State legislation and the State School Building Program. These capacity calculations are also used in preparing and filing the baseline school capacity statement with the Office of Public School Construction.

**Table 6**  
**State Classroom Loading Standards**

TK/Kindergarten	25 Students/Classroom
1 <sup>st</sup> -3 <sup>rd</sup> Grades	25 Students/Classroom
4 <sup>th</sup> -6 <sup>th</sup> Grades	25 Students/Classroom
7 <sup>th</sup> -8 <sup>th</sup> Grades	27 Students/Classroom
Non Severe Special Ed	13 Students/Classroom

Existing Facility Capacity

The State determines the baseline capacity by either loading all permanent teaching stations plus a maximum number of portables equal to 25% of the number of permanent classrooms or by loading all permanent classrooms and only portables that are owned or have been leased for over 5 years. As allowed by law and required by the State, facility capacities are calculated by identifying the number of teaching stations at each campus. All qualified teaching stations were included in the calculation of the capacities at the time the initial inventory was calculated. To account for activity and changes since the baseline was established in 1998/99, the student grants (which represent the seats added either by new schools or additions to existing schools) for new construction projects funded by OPSC have been added. Using these guidelines the District's current State calculated capacity is shown in Table 7.

**Table 7**

<b>Pioneer Union Elementary SD</b> <b>Summary of Existing Facility Capacity</b>							
<u>School Facility</u>	<u>Permanent Classrooms</u>	<u>Portable Classrooms</u>	<u>Chargeable Portables</u>	<u>Total Chargeable Classrooms</u>	<u>State Loading Factor</u>	<u>State Funded Projects</u>	<u>Total State Capacity</u>
Grades TK-6	9	37	10	19	25	754	1,229
Grades 7-8	28	0	0	28	27	56	812
<b>Totals</b>	<b>37</b>	<b>37</b>	<b>10</b>	<b>47</b>		<b>832</b>	<b>2,063</b>

OPSC Funded Projects

<u>Name</u>	<u>Project #</u>	<u>TK-6 Grants</u>	<u>7-8 Grants</u>	<u>Special Ed</u>
Frontier Elem	2	579	45	13
Pioneer Elem	3	175	11	9
<b>Totals</b>		<b>754</b>	<b>56</b>	<b>22</b>

This table shows a basic summary of the form and procedures used by OPSC (Office of Public School Construction) to determine the capacity of a school district. There were a total of 37 permanent classrooms in the District when the baseline was established. In addition there were 37 portable classrooms. However, OPSC regulations state that if the number of portables exceeds 25% of the permanent classrooms, then the maximum number of portables to be counted in the baseline capacity is 25% of the permanent classrooms. Therefore the chart shows the chargeable portables as 10 which is 25% of the permanent classroom count. This results in a total classroom count of 47 and is referred to as the chargeable classrooms since it accounts for the fact that some of the portable were not

included in the total. This is done to account for the fact that portables are typically considered to be temporary, especially when the total number exceeds 25% of the permanent classrooms.

To determine the total capacity based on State standards, the capacity of the chargeable classrooms are multiplied by the State loading standards and then the capacity of the projects completed since 1998/99 (when the baseline was established) are added based on the State funded new construction projects. As Table 7 shows, the total State capacity of the District facilities is 2,063 students.

Unhoused Students by State Housing Standards

This next table compares the facility capacity with the space needed to determine if there is available space for new students from the projected developments. The space needed was determined by reviewing the historic enrollments over the past four years along with the projected enrollment in five years to determine the number of seats needed to house the students within the existing homes. The seats needed were determined individually for each grade grouping. The projected enrollment in the space needed analysis did not include the impact of any new housing units.

**Table 8**

**Pioneer Union Elementary SD**  
**Summary of Available District Capacity**

<u>School Facility</u>	<u>State Capacity</u>	<u>Space Needed</u>	<u>Available Capacity</u>
Grades TK-6	1,229	1,780	(551)
Grades 7-8	812	394	418
Special Ed	22	23	(1)
<b>Totals</b>	<b>2,063</b>	<b>2,197</b>	<b>(134)</b>

Since the enrollment space needed exceeds the District capacity there is no excess capacity available to house students from new development.

### Calculation of Development's Fiscal Impact on Schools

This section of the Study will demonstrate that a reasonable relationship exists between residential, commercial/industrial development and the need for school facilities in the Pioneer Union Elementary School District. To the extent this relationship exists, the District is justified in levying developer fees as authorized by Education Code Section 17620.

#### School Facility Construction Costs

For the purposes of estimating the cost of building school facilities we have used the State School Building Program funding allowances. These amounts are shown in Table 9. In addition to the basic construction costs, there are site acquisition costs of \$61,474 per acre and service-site, utilities, off-site and general site development costs which are also shown in Table 9.

**Table 9**

#### **NEW CONSTRUCTION COSTS**

<u>Grade</u>					<u>Per Student</u>
	<u>Base Grant</u>	<u>Fire Alarms</u>	<u>Fire Sprinklers</u>	<u>Total</u>	
TK-6	\$31,540	\$38	\$528	\$32,106	
7-8	\$33,358	\$50	\$630	\$34,038	

<b>Site Acreage Needs</b>		<u>Projected</u>	<u>Equivalent</u>	<u>Site</u>
<u>Grade</u>	<u>Typical</u>	<u>Average</u>	<u>Sites</u>	<u>Acres</u>
<u>Grade</u>	<u>Acres</u>	<u>Students</u>	<u>Students</u>	<u>Needed</u>
TK-6	10	600	140	0.23
7-8	20	800	0	0.00
			<b>TOTAL</b>	<b>2.33</b>

#### **General Site Development Allowance**

<u>Grade</u>	<u>Allowance/</u>					
	<u>Acres</u>	<u>Acre</u>	<u>Base Cost</u>	<u>% Allowance</u>	<u>Added Cost</u>	<u>Total Cost</u>
TK-6	2.33	\$51,340	\$119,622	6%	\$269,690	\$389,313
7-8	0.00	\$51,340	\$0	6%	\$0	\$0
<b>Totals</b>	<b>2.33</b>					

#### **Site Acquisition & Development Summary**

<u>Grade</u>	<u>Acres</u>	<u>Site</u>					
		<u>Needed</u>	<u>Land Cost/Acre</u>	<u>Total Land Cost</u>	<u>Development Cost/Acre</u>	<u>Site Dev. Cost</u>	<u>General Site Development</u>
TK-6	2.33	\$61,474	\$143,234	\$339,346	\$790,676	\$389,313	\$1,179,989
7-8	0.00	\$61,474	\$0	\$319,258	\$0	\$0	\$0
<b>Totals</b>	<b>2.33</b>		<b>\$143,234</b>		<b>\$790,676</b>	<b>\$389,313</b>	<b>\$1,179,989</b>

Note: The grant amounts used are twice those shown in the appendix to represent the full cost of the facility needs and not just the standard State funding share of 50%.

**Impact of New Residential Development**

This next table compares the development-related enrollment to the available district capacity for each grade level and then multiplies the unhoused students by the new school construction costs to determine the total school facility costs related to the impact of new residential housing developments.

In addition, the State provides that new construction projects can include the costs for site acquisition and development, including appraisals, surveys and title reports. The District needs to acquire 2.33 acres to meet the needs of the students projected from the new developments. Therefore, the costs for site acquisition and development of the land have been included in the total impacts due to new development.

**Table 10**

**Pioneer Union Elementary SD**  
**Summary of Residential Impact**

<u>School Facility</u>	<u>Students Generated</u>	<u>Available Space</u>	<u>Net Unhoused</u>	<u>Construction Cost Per Student</u>	<u>Total Facility Costs</u>
Elementary	140	0	140	\$32,106	\$4,494,840
Middle	43	418	0	\$34,038	\$0
Site Purchase: 2.33 acres					\$143,234
Site Development:					\$1,179,989
<b>New Construction needs due to development:</b>					<b>\$5,818,063</b>
<b>Average cost per student:</b>					<b>\$31,793</b>
<b>Total Residential Sq Ft:</b>					<b>937,990</b>
<b>Residential Fee Justified:</b>					<b>\$6.20</b>

The total need for school facilities based solely on the impact of the 485 new housing units projected over the next five years totals \$5,818,063. To determine the impact per square foot of residential development, this amount is divided by the total square feet of the projected developments. As calculated from the historic Developer Fee Permits, the average size home built has averaged 1,934

square feet. The total area for 485 new homes would therefore be 937,990 square feet. The total residential fee needed to be able to collect \$5,818,063 would be **\$6.20** per square foot.

#### Impact of Other Residential Development

In addition to new residential development projects that typically include new single family homes and new multi-family units, the District can also be impacted by additional types of new development projects. These include but are not limited to redevelopment projects, additions to existing housing units, and replacement of existing housing units with new housing units.

These development projects are still residential projects and therefore it is reasonable to assume they would have the same monetary impacts per square foot as the new residential development projects. However, the net impact is reduced due to the fact that there was a previous residential building in its place. Therefore, the development impact fees should only be charged for other residential developments if the new building(s) exceed the square footage area of the previous building(s). If the new building is larger than the existing building, then it is reasonable to assume that additional students could be generated by the project. The project would only pay for the development impact fees for the net increase in assessable space generated by the development project. Education Code allows for an exemption from development impacts fees for any additions to existing residential structures that are 500 square feet or less.

#### Impact of Commercial/Industrial Development

There is a correlation between the growth of commercial/industrial firms/facilities within a community and the generation of school students within most business service areas. Fees for commercial/industrial can only be imposed if the residential fees will not fully mitigate the cost of providing school facilities to students from new development.

The approach utilized in this section is to apply statutory standards, U.S. Census employment statistics, and local statistics to determine the impact of future commercial/industrial development projects on the District. Many of the factors used in this analysis were taken from the U.S. Census, which remains the most complete and authoritative source of information on the community in addition to the “1990 SanDAG Traffic Generators Report”.

Employees per Square Foot of Commercial Development

Results from a survey published by the San Diego Association of Governments “1990 San DAG Traffic Generators” are used to establish numbers of employees per square foot of building area to be anticipated in new commercial or industrial development projects. The average number of workers per 1,000 square feet of area ranges from 0.06 for Rental Self Storage to 4.79 for Standard Commercial Offices. The generation factors from that report are shown in the following table.

Table 11

Commercial/Industrial Category	Average Square Foot Per Employee	Employees Per Average Square Foot
Banks	354	0.00283
Community Shopping Centers	652	0.00153
Neighborhood Shopping Centers	369	0.00271
Industrial Business Parks	284	0.00352
Industrial Parks	742	0.00135
Rental Self Storage	15541	0.00006
Scientific Research & Development	329	0.00304
Lodging	882	0.00113
Standard Commercial Office	209	0.00479
Large High Rise Commercial Office	232	0.00431
Corporate Offices	372	0.00269
Medical Offices	234	0.00427

*Source: 1990 SanDAG Traffic Generators report*

Students per Employee

The number of students per employee is determined by using the S0802: Means of Transportation to Work by Selected Characteristics 2018-2022 American Community Survey 5-Year Estimates and DP1: Profile of General Population and Housing Characteristics 2020: DEC Demographic Profile for the District. There were 5,420 employees and 4,189 homes in the District. This represents a ratio of 1.2939 employees per home.

There were 1,578 school age children attending the District in 2020. This is a ratio of 0.2911 students per employee. This ratio, however, must be reduced by including only the percentage of employees that worked in their community of residence (28%), because only those employees living in the District will impact the District's school facilities with their children. The net ratio of students per employee in the District is 0.0815.

#### School Facilities Cost per Student

Facility costs for housing commercially generated students are the same as those used for residential construction. The cost factors used to assess the impact from commercial development projects are contained in Table 10.

#### Residential Offset

When additional employees are generated in the District as a result of new commercial/industrial development, fees will also be charged on the residential units necessary to provide housing for the employees living in the District. To prevent a commercial or industrial development from paying for the portion of the impact that will be covered by the residential fee, this amount has been calculated and deducted from each category. The residential offset amount is calculated by multiplying the following factors together and dividing by 1,000 (to convert from cost per 1,000 square feet to cost per square foot).

- Employees per 1,000 square feet (varies from a low of 0.06 for rental self storage to a high of 4.79 for office building).
- Percentage of employees that worked in their community of residence (28 percent).
- Housing units per employee (0.7729). This was derived from the 2018-2022 ACS 5 Year Estimates and DP1 data for the District, which indicates there were 4,189 housing units and 5,420 employees.
- Percentage of employees that will occupy new housing units (75 percent).
- Average square feet per dwelling unit (1,934).
- Residential fee charged by the District (\$3.10 (60% of \$5.17 per square foot)).
- Average cost per student was determined in Table 10.

The following table shows the calculation of the school facility costs generated by a square foot of new commercial/industrial development for each category of development.

**Table 12**

**Pioneer Union Elementary SD**  
**Summary of Commercial and Industrial Uses**

Type	Employees per 1,000 Sq. Ft.	Students per Employee	Students per 1,000 Sq. Ft.	Average Cost per Student	Cost per Sq. Ft.	Residential offset per Sq. Ft.	Net Cost per Sq. Ft.
Banks	2.83	0.0815	0.231	\$31,793	\$7.33	\$2.75	\$4.58
Community Shopping Centers	1.53	0.0815	0.125	\$31,793	\$3.97	\$1.49	\$2.48
Neighborhood Shopping Centers	2.71	0.0815	0.221	\$31,793	\$7.02	\$2.64	\$4.38
Industrial Business Parks	3.52	0.0815	0.287	\$31,793	\$9.12	\$3.43	\$5.69
Industrial Parks	1.35	0.0815	0.110	\$31,793	\$3.50	\$1.31	\$2.19
Rental Self Storage	0.06	0.0815	0.005	\$31,793	\$0.16	\$0.06	\$0.10
Scientific Research & Development	3.04	0.0815	0.248	\$31,793	\$7.88	\$2.96	\$4.92
Lodging	1.13	0.0815	0.092	\$31,793	\$2.93	\$1.10	\$1.83
Standard Commercial Office	4.79	0.0815	0.390	\$31,793	\$12.41	\$4.66	\$7.75
Large High Rise Commercial Office	4.31	0.0815	0.351	\$31,793	\$11.17	\$4.19	\$6.98
Corporate Offices	2.69	0.0815	0.219	\$31,793	\$6.97	\$2.62	\$4.35
Medical Offices	4.27	0.0815	0.348	\$31,793	\$11.07	\$4.16	\$6.91

\*Based on 1990 SanDAG Traffic Generator Report

**Net Cost per Square Foot**

Since the Districts share of the State Maximum Fee is now \$.50 (60% of \$0.84) for commercial/industrial construction, the District is justified in collecting the maximum fee for all categories with the exception of Rental Self Storage. The District can only justify collection of \$0.10 per square foot of Rental Self Storage construction.

**Verifying the Sufficiency of the Development Impact**

Education Code Section 17620 requires districts to find that fee revenues will not exceed the cost of providing school facilities to the students generated by the development paying the fees. This section shows that the fee revenues do not exceed the impact of the new development.

The total need for school facilities resulting from new development totals \$5,818,063. The amount the District would collect over the five year period at the maximum rate of \$3.10 (60% of \$5.17) for residential and \$0.50 (60% of \$0.84) for commercial/industrial development would be as follows:

\$3.10 x 485 homes x 1,934 sq ft per home = \$2,907,769 for Residential

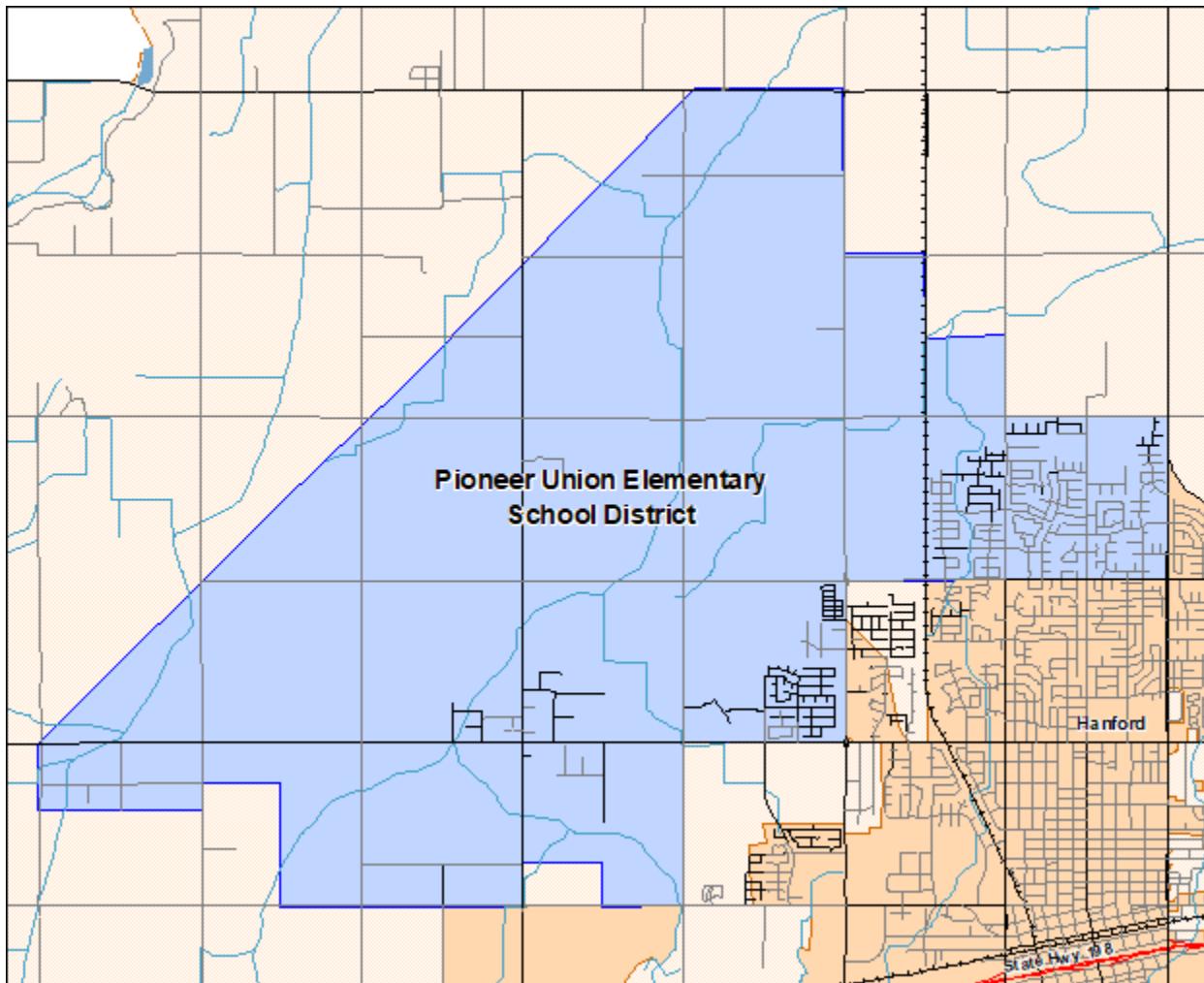
\$0.50 x 8,074 sq ft per year x 5 years = \$20,185 for Commercial/Industrial

Total projected 5 year income: \$2,927,954

The estimated income is less than the projected facility needs due to the impact of new development projects.

### District Map

The following map shows the extent of the areas for which development fees are applicable to the Pioneer Union Elementary School District.



## Conclusion

Based on the data contained in this Study, it is found that a reasonable relationship exists between residential, commercial/industrial development and the need for school facilities in the Pioneer Union Elementary School District. The following three nexus tests required to show justification for levying fees have been met:

**Burden Nexus:** New residential development will generate an average of 0.3767 TK-8 grade students per unit. Because the District does not have adequate facilities for all the students generated by new developments, the District will need to build additional facilities and/or modernize/reconstruct the existing facilities in order to maintain existing level of services in which the new students will be housed.

**Cost Nexus:** The cost to provide new and reconstructed facilities is an average of \$6.20 per square foot of residential development. Each square foot of residential development will generate \$3.10 (60% of \$5.17) in developer fees resulting in a shortfall of \$3.10 per square foot.

**Benefit Nexus:** The developer fees to be collected by the Pioneer Union Elementary School District will be used for the provision of additional and reconstructed or modernized school facilities. This will benefit the students to be generated by new development by providing them with adequate educational school facilities.

The District's planned use of the fees received from development impacts will include the following types of projects, each of which will benefit students from new developments.

- 1) **New Schools:** When there is enough development activity occurring in a single area, the District will build a new school to house the students from new developments.
  
- 2) **Additions to Existing Schools:** When infill development occurs, the District will accommodate students at existing schools by building needed classrooms and/or support facilities such as cafeterias, restrooms, gyms and libraries as needed to increase the school capacity. Schools may also need upgrades of the technology and tele-communication systems to be able to increase their capacity.

- 3) Portable Replacement Projects: Some of the District's capacity is in portables and therefore may not be included in the State's capacity calculations. These portables can be replaced with new permanent or modular classrooms to provide adequate space for students from new developments. These projects result in an increase to the facility capacity according to State standards. In addition, old portables that have reached the end of their life expectancy, will need to be replaced to maintain the existing level of service. These types of projects are considered modernization projects in the State Building Program. If development impacts did not exist, the old portables could be removed.
  
- 4) Modernization/Upgrade Projects: In many cases, students from new developments are not located in areas where new schools are planned to be built. The District plans to modernize or upgrade older schools to be equivalent to new schools so students will be housed in equitable facilities to those students housed in new schools. These projects may include updates to the building structures to meet current building standards, along with upgrades to the current fire and safety standards and any access compliance standards.

The District plans to use the developer fees to make payments on their COP's. The District is also looking to purchase land for a future school site.

Per the District's agreement with the High School District, the elementary share of the developer fees collected is 60%. The reasonable relationship identified by these findings provides the required justification for the Pioneer Union Elementary School District to levy the maximum fees of \$3.10 (60% of \$5.17) per square foot for residential construction and \$0.50 (60% of \$0.84) per square foot for commercial/industrial construction, except for Rental Self Storage facilities in which a fee of \$0.10 per square foot is justified as authorized by Education Code Section 17620.

# Appendices

## 2024 Developer Fee Justification Study

*Pioneer Union Elementary School District*

## ENROLLMENT CERTIFICATION/PROJECTION

SAB 50-01 (REV 05/09)

SCHOOL DISTRICT Pioneer Union Elementary	FIVE DIGIT DISTRICT CODE NUMBER (see California Public School Directory) 66399	
COUNTY Kings	HIGH SCHOOL ATTENDANCE AREA (HSAA) OR SUPER HSAA (if applicable)	

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

485

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

.376700

## Part A. K-12 Pupil Data

Grade	7th Prev.	6th Prev.	5th Prev.	4th Prev.	3rd Prev.	2nd Prev.	Previous	Current
	/	/	/	/	2020 / 2021	2021 / 2022	2022 / 2023	2023 / 2024
K					173	165	204	237
1					177	149	153	143
2					154	188	160	162
3					151	154	196	174
4					164	152	160	196
5					175	177	150	166
6					156	185	182	160
7					193	176	193	198
8					197	195	175	200
9					0	0	0	0
10					0	0	0	0
11					0	0	0	0
12					0	0	0	0
TOTAL					1540	1541	1573	1636

## Part B. Pupils Attending Schools Chartered By Another District

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

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

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

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

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

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

7th Prev.	6th Prev.	5th Prev.	4th Prev.	3rd Prev.	2nd Prev.	Previous	Current
/	/	/	/	2020 / 2021	2021 / 2022	2022 / 2023	2023 / 2024

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

<input type="checkbox"/> County Birth Data	<input type="checkbox"/> Birth Data by District ZIP Codes	<input type="checkbox"/> Estimate	<input type="checkbox"/> Estimate	<input type="checkbox"/> Estimate
--	---	-----------------------------------	-----------------------------------	-----------------------------------

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

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

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

NAME OF DISTRICT REPRESENTATIVE (PRINT OR TYPE)

SIGNATURE OF DISTRICT REPRESENTATIVE

DATE TELEPHONE NUMBER

E-MAIL ADDRESS

# PROFILE OF GENERAL POPULATION AND HOUSING CHARACTERISTICS



Note: This is a modified view of the original table produced by the U.S. Census Bureau. This download or printed version may have missing information from the original table.

Pioneer Union Elementary School District (Kings County), California		
Label	Count	Percent
➤ SEX AND AGE		
➤ MEDIAN AGE BY SEX		
➤ RACE		
➤ TOTAL RACES TALLIED [1]		
➤ HISPANIC OR LATINO		
➤ HISPANIC OR LATINO BY RACE		
➤ RELATIONSHIP		
➤ HOUSEHOLDS BY TYPE		
▼ HOUSING OCCUPANCY		
▼ Total housing units	4,331	100.0%
Occupied housing units	4,189	96.7%
▼ Vacant housing units	142	3.3%
For rent	62	1.4%
Rented, not occupied	3	0.1%
For sale only	26	0.6%
Sold, not occupied	13	0.3%
For seasonal, recreational, or	8	0.2%
All other vacants	30	0.7%
▼ VACANCY RATES		

# Table Notes

---

## PROFILE OF GENERAL POPULATION AND HOUSING CHARACTERISTICS

**Survey/Program:** Decennial Census

**Year:** 2020

**Table ID:** DP1

Note: For information on data collection, confidentiality protection, nonsampling error, subject definitions, and guidance on using the data, visit the 2020 Census Demographic and Housing Characteristics File (DHC) Technical Documentation webpage.

To protect respondent confidentiality, data have undergone disclosure avoidance methods which add "statistical noise" - small, random additions or subtractions - to the data so that no one can reliably link the published data to a specific person or household. The Census Bureau encourages data users to aggregate small populations and geographies to improve accuracy and diminish implausible results.

An "(X)" means not applicable.

An "—" means the statistic could not be computed because there were an insufficient number of observations.

[1] The alone or in combination categories are tallies of responses rather than respondents. That is, the alone or in combination categories are not mutually exclusive. Individuals who reported two races were counted in two separate and distinct alone or in combination race categories, while those who reported three races were counted in three categories, and so on. For example, a respondent who indicated "White

**and**

Black or African American" was counted in the White alone or in combination category as well as in the Black or African American alone or in combination category. Consequently, the sum of all alone or in combination categories equals the number of races reported (i.e., responses), which exceeds the total population.

[2] "Child" includes biological, adopted, and stepchildren of the householder.

[3] "Own children" includes biological, adopted, and stepchildren of the householder.

[4] The homeowner vacancy rate is the proportion of the homeowner inventory that is vacant "for sale." It is computed by dividing the total number of vacant units "for sale only" by the sum of owner-occupied units, vacant units that are "for sale only," and vacant units that have been sold but not yet occupied; and then multiplying by 100.

[5] The rental vacancy rate is the proportion of the rental inventory that is vacant "for rent." It is computed by dividing the total number of vacant units "for rent" by the sum of the renter-occupied units, vacant units that are "for rent," and vacant units that have been rented but not yet occupied; and then multiplying by 100.

Source: U.S. Census Bureau, 2020 Census Demographic Profile

# Selected Housing Characteristics



Note: This is a modified view of the original table produced by the U.S. Census Bureau. This download or printed version may have missing information from the original table.

Pioneer Union Elementary School District (Kings County), California					
Label	Estimate	Margin of Error	Percent	Percent Margin of Err	
▼ HOUSING OCCUPANCY					
▼ Total housing units	4,169	±319	4,169	(	)
Occupied housing units	4,036	±347	96.8%	±2	
Vacant housing units	133	±98	3.2%	±2	
Homeowner vacancy rate	0.0	±1.3	(X)	(	)
Rental vacancy rate	0.0	±3.9	(X)	(	)
▼ UNITS IN STRUCTURE					
▼ Total housing units	4,169	±319	4,169	(	)
1-unit, detached	3,546	±333	85.1%	±3	
1-unit, attached	0	±21	0.0%	±1	
2 units	0	±21	0.0%	±1	
3 or 4 units	359	±157	8.6%	±3	
5 to 9 units	77	±85	1.8%	±1	
10 to 19 units	56	±59	1.3%	±1	
20 or more units	101	±79	2.4%	±1	
Mobile home	30	±36	0.7%	±1	
Boat, RV, van, etc.	0	±21	0.0%	±1	
▼ YEAR STRUCTURE BUILT					
▼ Total housing units	4,169	±319	4,169	(	)

# Table Notes

---

## Selected Housing Characteristics

**Survey/Program:** American Community Survey

**Year:** 2022

**Estimates:** 5-Year

**Table ID:** DP04

Although the American Community Survey (ACS) produces population, demographic and housing unit estimates, the decennial census is the official source of population totals for April 1st of each decennial year. In between censuses, the Census Bureau's Population Estimates Program produces and disseminates the official estimates of the population for the nation, states, counties, cities, and towns and estimates of housing units for states and counties.

Information about the American Community Survey (ACS) can be found on the ACS website. Supporting documentation including code lists, subject definitions, data accuracy, and statistical testing, and a full list of ACS tables and table shells (without estimates) can be found on the Technical Documentation section of the ACS website.

Sample size and data quality measures (including coverage rates, allocation rates, and response rates) can be found on the American Community Survey website in the [Methodology](#) section.

Source: U.S. Census Bureau, 2018-2022 American Community Survey 5-Year Estimates

Data are based on a sample and are subject to sampling variability. The degree of uncertainty for an estimate arising from sampling variability is represented through the use of a margin of error. The value shown here is the 90 percent margin of error. The margin of error can be interpreted roughly as providing a 90 percent probability that the interval defined by the estimate minus the margin of error and the estimate plus the margin of error (the lower and upper confidence bounds) contains the true value. In addition to sampling variability, the ACS estimates are subject to nonsampling error (for a discussion of nonsampling variability, see ACS Technical Documentation). The effect of nonsampling error is not represented in these tables.

Households not paying cash rent are excluded from the calculation of median gross rent.

Telephone service data are not available for certain geographic areas due to problems with data collection of this question that occurred in 2019. Both ACS 1-year and ACS 5-year files were affected and may take several years in the ACS 5-year files until the estimates are available for the geographic areas affected.

The 2018-2022 American Community Survey (ACS) data generally reflect the March 2020 Office of Management and Budget (OMB) delineations of metropolitan and micropolitan statistical areas. In certain instances, the names, codes, and boundaries of the principal cities shown in ACS tables may differ from the OMB delineation lists due to differences in the effective dates of the geographic entities.

Estimates of urban and rural populations, housing units, and characteristics reflect boundaries of urban areas defined based on 2020 Census data. As a result, data for urban and rural areas from the ACS do not necessarily reflect the results of ongoing urbanization.

Explanation of Symbols:

-

The estimate could not be computed because there were an insufficient number of sample observations. For a ratio of medians estimate, one or both of the median estimates falls in the lowest inter or highest interval of an open-ended distribution. For a 5-year median estimate, the margin of error associated with a median was larger than the median itself.

N

The estimate or margin of error cannot be displayed because there were an insufficient number of sample cases in the selected geographic area.

(X)

The estimate or margin of error is not applicable or not available.

median-

The median falls in the lowest interval of an open-ended distribution (for example "2,500-")

median+

The median falls in the highest interval of an open-ended distribution (for example "250,000+").

\*\*

The margin of error could not be computed because there were an insufficient number of sample observations.

\*\*\*

The margin of error could not be computed because the median falls in the lowest interval or highest interval of an open-ended distribution.

\*\*\*\*

A margin of error is not appropriate because the corresponding estimate is controlled to an independent population or housing estimate. Effectively, the corresponding estimate has no sampling error and the margin of error may be treated as zero.

# Means of Transportation to Work by Selected Characteristics

Note: This is a modified view of the original table produced by the U.S. Census Bureau. This download or printed version may have missing information from the original table.

Label	Pioneer Union Elementary School District (Kings County), California		
	Total	Car, truck, or van	Margin of Error
▼ Workers 16 years and over	5,420		±610
➤ AGE			
➤ SEX			
➤ RACE AND HISPANIC OR LATINO ORIGIN			
➤ NATIVITY AND CITIZENSHIP STATUS			
➤ LANGUAGE SPOKEN AT HOME AND ABILITY TO SPEAK ENGLISH			
➤ EARNINGS IN THE PAST 12 MONTHS (IN 2022 INFLATION-ADJUSTED DOLLARS) FOR WORKERS			
➤ POVERTY STATUS IN THE PAST 12 MONTHS			
➤ Workers 16 years and over	5,420		±610
▼ Workers 16 years and over who did not work from home	4,942		±549
➤ TIME OF DEPARTURE TO GO TO WORK			
▼ TRAVEL TIME TO WORK			
Less than 10 minutes	14.0%		±5.1
10 to 14 minutes	14.0%		±4.6
15 to 19 minutes	10.8%		±3.7
20 to 24 minutes	10.7%		±4.0
25 to 29 minutes	10.9%		±5.3
30 to 34 minutes	12.2%		±5.1

# Table Notes

---

## Means of Transportation to Work by Selected Characteristics

**Survey/Program:** American Community Survey

**Year:** 2022

**Estimates:** 5-Year

**Table ID:** S0802

Although the American Community Survey (ACS) produces population, demographic and housing unit estimates, the decennial census is the official source of population totals for April 1st of each decennial year. In between censuses, the Census Bureau's Population Estimates Program produces and disseminates the official estimates of the population for the nation, states, counties, cities, and towns and estimates of housing units for states and counties.

Information about the American Community Survey (ACS) can be found on the ACS website. Supporting documentation including code lists, subject definitions, data accuracy, and statistical testing, and a full list of ACS tables and table shells (without estimates) can be found on the Technical Documentation section of the ACS website.

Sample size and data quality measures (including coverage rates, allocation rates, and response rates) can be found on the American Community Survey website in the [Methodology](#) section.

Source: U.S. Census Bureau, 2018-2022 American Community Survey 5-Year Estimates

Data are based on a sample and are subject to sampling variability. The degree of uncertainty for an estimate arising from sampling variability is represented through the use of a margin of error. The value shown here is the 90 percent margin of error. The margin of error can be interpreted roughly as providing a 90 percent probability that the interval defined by the estimate minus the margin of error and the estimate plus the margin of error (the lower and upper confidence bounds) contains the true value. In addition to sampling variability, the ACS estimates are subject to nonsampling error (for a discussion of nonsampling variability, see ACS Technical Documentation). The effect of nonsampling error is not represented in these tables.

Foreign born excludes people born outside the United States to a parent who is a U.S. citizen.

Workers include members of the Armed Forces and civilians who were at work last week.

Industry titles and their 4-digit codes are based on the 2017 North American Industry Classification System. The Industry categories adhere to the guidelines issued in Clarification Memorandum No. "NAICS Alternate Aggregation Structure for Use By U.S. Statistical Agencies," issued by the Office of Management and Budget.

Occupation titles and their 4-digit codes are based on the 2018 Standard Occupational Classification.

When information is missing or inconsistent, the Census Bureau logically assigns an acceptable value using the response to a related question or questions. If a logical assignment is not possible, data are filled using a statistical process called allocation, which uses a similar individual or household to provide a donor value. The "Allocated" section is the number of respondents who received an allocated value for a particular subject.

Several means of transportation to work categories were updated in 2019. For more information, see: [Change to Means of Transportation](#).

In 2019, methodological changes were made to the class of worker question. These changes involved modifications to the question wording, the category wording, and the visual format of the categories on the questionnaire. The format for the class of worker categories are now listed under the headings "Private Sector Employee," "Government Employee," and "Self-Employed or Other." Additionally, the category of Active Duty was added as one of the response categories under the "Government Employee" section for the mail questionnaire. For more detailed information about the

2019 changes, see the 2016 American Community Survey Content Test Report for Class of Worker located at [http://www.census.gov/library/working-papers/2017/acs/2017\\_Martinez\\_01.html](http://www.census.gov/library/working-papers/2017/acs/2017_Martinez_01.html).

The 2018-2022 American Community Survey (ACS) data generally reflect the March 2020 Office of Management and Budget (OMB) delineations of metropolitan and micropolitan statistical areas. In certain instances, the names, codes, and boundaries of the principal cities shown in ACS tables may differ from the OMB delineation lists due to differences in the effective dates of the geographic entities.

Estimates of urban and rural populations, housing units, and characteristics reflect boundaries of urban areas defined based on 2020 Census data. As a result, data for urban and rural areas from the ACS do not necessarily reflect the results of ongoing urbanization.

Explanation of Symbols:

-

The estimate could not be computed because there were an insufficient number of sample observations. For a ratio of medians estimate, one or both of the median estimates falls in the lowest inter or highest interval of an open-ended distribution. For a 5-year median estimate, the margin of error associated with a median was larger than the median itself.

N

The estimate or margin of error cannot be displayed because there were an insufficient number of sample cases in the selected geographic area.

(X)

The estimate or margin of error is not applicable or not available.

median-

The median falls in the lowest interval of an open-ended distribution (for example "2,500-")

median+

The median falls in the highest interval of an open-ended distribution (for example "250,000+").

\*\*

The margin of error could not be computed because there were an insufficient number of sample observations.

\*\*\*

The margin of error could not be computed because the median falls in the lowest interval or highest interval of an open-ended distribution.

\*\*\*\*

A margin of error is not appropriate because the corresponding estimate is controlled to an independent population or housing estimate. Effectively, the corresponding estimate has no sampling error and the margin of error may be treated as zero.

## Use of Developer Fees:

A School District can use the revenue collected on residential and commercial/industrial construction for the purposes listed below:

- Purchase or lease of interim school facilities to house students generated by new development pending the construction of permanent facilities.
- Purchase or lease of land for school facilities for such students.
- Acquisition of school facilities for such students, including:
  - Construction
  - Modernization/reconstruction
  - Architectural and engineering costs
  - Permits and plan checking
  - Testing and inspection
  - Furniture, Equipment and Technology for use in school facilities
- Legal and other administrative costs related to the provision of such new facilities
- Administration of the collection of, and justification for, such fees, and
- Any other purpose arising from the process of providing facilities for students generated by new development.

Following is an excerpt from the Education Code that states the valid uses of the Level 1 developer fees. It refers to construction and reconstruction. The term reconstruction was originally used in the Leroy Greene program. The term modernization is currently used in the 1998 State Building Program and represents the same scope of work used in the original reconstruction projects.

**Ed Code Section 17620.** (a) (1) The governing board of any school district is authorized to levy a fee, charge, dedication, or other requirement against any construction within the boundaries of the district, for the purpose of funding the construction or reconstruction of school facilities, subject to any limitations set forth in Chapter 4.9 (commencing with Section 65995) of Division 1 of Title 7 of the Government Code. This fee, charge, dedication, or other requirement may be applied to construction only as follows: ...

The limitations referred to in this text describe the maximum amounts that can be charged for residential and commercial/industrial projects and any projects that qualify for exemptions. They do not limit the use of the funds received.