

**AGREEMENT TO PREPARE**  
**DEVELOPER FEE JUSTIFICATION STUDY**  
**for**  
**MOUNTAIN VIEW WHISMAN SCHOOL DISTRICT**

Prepared by:

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## PURPOSE OF PROJECT

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The objective of this project is to determine if a reasonable relationship exists between new residential, commercial, and industrial development and the need for new and/or reconstructed school facilities in the Mountain View Whisman School District. The study will be documented to provide the District with the justification necessary to levy developer fees as authorized by Education Code Section 17620. The report will comply with any new legislative requirements to date, including SB 1693 and AB 3081 requirements.

## PROJECT METHODOLOGY

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The project that Jack Schreder & Associates, Inc. is proposing will be comprised of the following separate components:

- Component A:** Projection of the residential, commercial, and industrial development.
- Component B:** Identification of student yield factors for residential, commercial, and industrial development.
- Component C:** Generation of enrollment projections based on natural growth and new residential development.
- Component D:** Identification of existing facility capacity, facility needs, and facility costs based on enrollment projections. Class size reduction implementation may affect District capacity.
- Component E:** Preparation of documentation in compliance with current developer fee law.

## **COMPONENT A**

In order to identify the projected student impact of residential, commercial, and industrial development, it is necessary to assess the impact of development. This component of the study will identify the level of future residential, commercial, and industrial development anticipated to occur in the District.

As required to justify developer fees, the specific steps in this component are:

- Identify approved and tentative development projects on file with the county and city planning departments where applicable.
- Identify development potential for vacant and under-developed land.
- Identify city building densities, current zoning, and master plan designations to establish build-out potentials.
- Provide development projections for single family residential and multiple family residential development. Provide projections of commercial and industrial development by category.
- Determine the development impact on the District when pre-existing dwelling units are demolished and replaced by reconstructed dwelling units as it occurs within the District boundaries.
- Project fee revenues for residential, commercial and industrial based on the current maximum fee.

*District responsibility: Provide information regarding current and future projected residential development known to the District.*

## **COMPONENT B**

State default student yields will be utilized or student generation rates (SGR's) will be calculated to project the student impact of future development. The commercial/industrial SGR's will address employee generation factors, as provided by the San Diego Traffic Generation documentation (17621(e)(1)(B)).

## **COMPONENT C**

Enrollment projections for the District will be provided which are based on the levels of new residential development identified in Component A and the SGR's identified in Component B. The enrollment projections will utilize a cohort survival methodology and proposed residential development where applicable.

*District responsibility: Provide demographic information, including CBEDS enrollment for the current school year. Enrollments must be provided by grade level.*

## **COMPONENT D**

Once the enrollment projections are established, the District's ability to house future enrollments will be analyzed. The capacity of the District facility will be identified and future enrollments will be "loaded" into the facilities to determine if, and when, the capacity at each grade level organization will be exceeded. The effects of class size reduction program implementation will be determined. Costs for providing new facilities will be provided on a per dwelling unit, per student, and per square foot basis.

In addition to establishing the District's future facility needs and costs, the available facility funding sources will be identified.

*District responsibility: Provide a schematic fire drill map or SP1A of each District site, including any closed or unused sites. The schematic should include current class use, District loading policy, and any limitation to housing additional students (classroom use or school site size.) Portable classrooms must be identified for each site, including use, and ownership; if they are leased, terms of lease must be provided.*

## **COMPONENT E**

The information and conclusions identified in Components A through D will be included in a report to be delivered to the District upon completion of the project. The report will comply with the requirements of Education Code Section 17620.

## **CONSULTING FEES**

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Jack Schreder & Associates, Inc. will provide a digital (PDF) draft copy of the report for district review. After the report is finalized, a digital (PDF) final report will be provided to the district. Upon request, bound hard copies will be provided to the district. Jack Schreder & Associates, Inc. will provide step-by-step instructions to implement the fees. Model resolutions and Board policies for the public hearing process and the establishment of developer fees will also be provided.

### **Mountain View Whisman SD**

### **Price**

#### **Developer Fee Justification Study**

**\$5913**

*Note: Education Code Section 17620(a)(5) provides that developer fee revenues may be used to pay for the cost of preparing developer fee justification documentation.*

As a courtesy at **no cost to the District**, Jack Schreder & Associates, Inc. will provide a template for your District's annual/5-year plan as required by Government Code Sections 66006 and 66001. This plan is updated each year and must be available for public review by December 26<sup>th</sup> (180 days after close of previous fiscal year).

Upon the District's request, Jack Schreder & Associates, Inc. will assist the District with completing the plan. The cost for such assistance is \$185/hour, not to exceed 16 hours.

### **Additional Considerations**

- The quoted price does not include attendance at the Board meeting when the report is presented; this is an additional optional cost for the District.
- Visitations to the district following the completion of the draft will be reimbursed to the Consultant in the amount of \$185 an hour including travel time.
- Reproduction costs for bound hard copies of the final report will be reimbursed to the Consultant.
- Express mail expenses will be documented and reimbursed to the Consultant.

## TIME SCHEDULE

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The draft report which will include baseline data regarding District capacity, student yield information, classroom loading policies and class size reduction will be determined within 60 days of a signed agreement and receipt of requested information. The final report will be completed 15 days after receipt of the final draft from the District.

**This agreement is between the Mountain View Whisman SD and Jack Schreder & Associates, Inc.**

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Rebecca Westover  
Chief Business Officer  
Mountain View Whisman SD

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Date



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Elona Cunningham  
Jack Schreder & Associates, Inc.

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June 19, 2023

Date