

RESIDENTIAL DEVELOPMENT RESEARCH REPORT

FALL 2020

PREPARED FOR:
SAN BRUNO PARK SCHOOL DISTRICT

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SUBMITTED: AUGUST 15, 2019

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SAN BRUNO PARK SCHOOL DISTRICT

EXECUTIVE SUMMARY

NEW RESIDENTIAL DEVELOPMENT – FALL 2020

DecisionInsite is pleased to present this report of findings to the San Bruno Park School District. Based on information collected from the local planning department(s) and developer(s) as of August 2019, it is anticipated that the district could potentially experience the construction and occupation of 395 new dwelling units over the next five (5) years. This total unit count includes 69 Single Family Detached units, 30 Single Family Attached units, and 296 Multifamily units.

STUDENT GENERATION RATE ASSUMPTIONS

The student generation rates applied to this projection are DecisionInsite's default rates, which have been prepared based on a comprehensive review of recently-constructed dwelling units with similar characteristics. The total across all grade ranges for the district (K-8), is 0.38 for Single Family Detached units, 0.28 for Single Family Attached units, and 0.20 for Multifamily units.

ANTICIPATED IMPACT OF NEW RESIDENTIAL DEVELOPMENT

A Conservative Dwelling Unit ("DU") Scenario has been generated for the district. The five-year projection of K-8 students generated by proposed new residential development for the Conservative DU Scenario is shown in the table below. The "Annual" row projects the number of students new to the district from these units, in a given year. The "Aggregate" row projects the accumulated increase in students served by the district through the year indicated.

	2020	2021	2022	2023	2024
Aggregate		20	45	72	87
Annual	6	15	27	30	20

MORE INFORMATION

A richer and more comprehensive review is contained in the Residential Development Research Report accompanying this Executive Summary. A wealth of more detailed information and analysis is also quickly and easily accessible online.

Respectfully Prepared and Submitted by:

The **DecisionInsite** Team

August 15, 2019

SAN BRUNO PARK SCHOOL DISTRICT

RESIDENTIAL DEVELOPMENT RESEARCH METHODOLOGY AND DATA

RESEARCH METHODOLOGY

The DecisionInsite residential research team works with the school district's local planning department(s) to compile a list of all active residential development projects within the district. When putting together this list of projects, we include only active, non-senior residential projects larger than 10 units. We believe this to be the most efficient way to build a picture of the district's future residential changes, since smaller projects would generally have a negligible impact on the district. These active projects would include developments either currently under construction, those with active entitlements, or any proposed future projects.

We then follow up with developers to gather as much information as possible on the project's unit type(s), planned build-out unit counts, construction schedules, etc. From these data, we create two scenarios. The Moderate DU Scenario is directly based on information provided by the planning departments and developers regarding anticipated construction schedules and unit occupancies. The Conservative DU Scenario is derived from the Moderate's by assuming occupancies will occur over a longer period. Because of this, the unit totals in the Conservative DU Scenario may be less than those of the Moderate DU Scenario if they are pushed out beyond the next five years. Similarly, because of these adjustments, in any given year it may also be possible for the annual number totals of the Conservative DU Scenario to exceed those of the Moderate DU Scenario.

**Note that as a Small District client receiving a single Conservative enrollment projection, this report will focus on the corresponding Conservative DU Scenario only.*

DWELLING UNIT TYPES

New dwelling units are categorized into the following three (3) housing types:

- **Single Family Detached ("SFD")** – Units are stand-alone structures on their own lot with a unique Assessor's parcel number.
- **Single Family Attached ("SFA")** – Units share common walls, usually on both sides of the property, where each is assigned a unique Assessor's parcel number (e.g., townhomes, condominiums, duplexes).
- **Multifamily ("MF")** – Units share common walls in a building or structure designed to house several families in separate housing units. All units are on the same lot with one Assessor's parcel number (e.g., apartments).

ACTIVE RESIDENTIAL DEVELOPMENT PROJECTS WITHIN THE DISTRICT

Based on information collected from the local planning department(s) and developer(s) as of August 2019, it is anticipated that the district could potentially experience the construction and occupation of 395 new dwelling units over the next five years. The total unit count included in the Conservative DU Scenario is broken out as shown in the table below.

New Dwelling Units by Unit Type	
Unit Type	# of Units
Single Family Detached	69
Single Family Attached	30
Multifamily	296
Totals:	395

FIGURE 1

The table below provides the project name, unit type, and anticipated occupancy data for all active, non-senior residential development projects greater than 10 units planned to be occupied over the next five years.

This table shows the Conservative DU Scenario which is derived from the Moderate's by assuming occupancies will occur over a longer period.

Project Name	Unit Type	Unit				
		2020	2021	2022	2023	2024
111 San Bruno	MF	0	0	43	19	0
271 El Camino Real	MF	0	0	17	7	0
Glenview Terrace	SFD	0	0	11	10	8
Mills Park Plaza	MF	0	0	0	55	42
Plaza Apartments	MF	30	13	0	0	0
Skyline College	SFA	0	21	9	0	0
Skyline College	SFD	0	14	14	12	0
Totals:		30	48	94	103	50

FIGURE 2

The graph below shows the anticipated occupancy data accumulated by year for all active, non-senior residential development projects greater than 10 units planned to be occupied over the next five years.

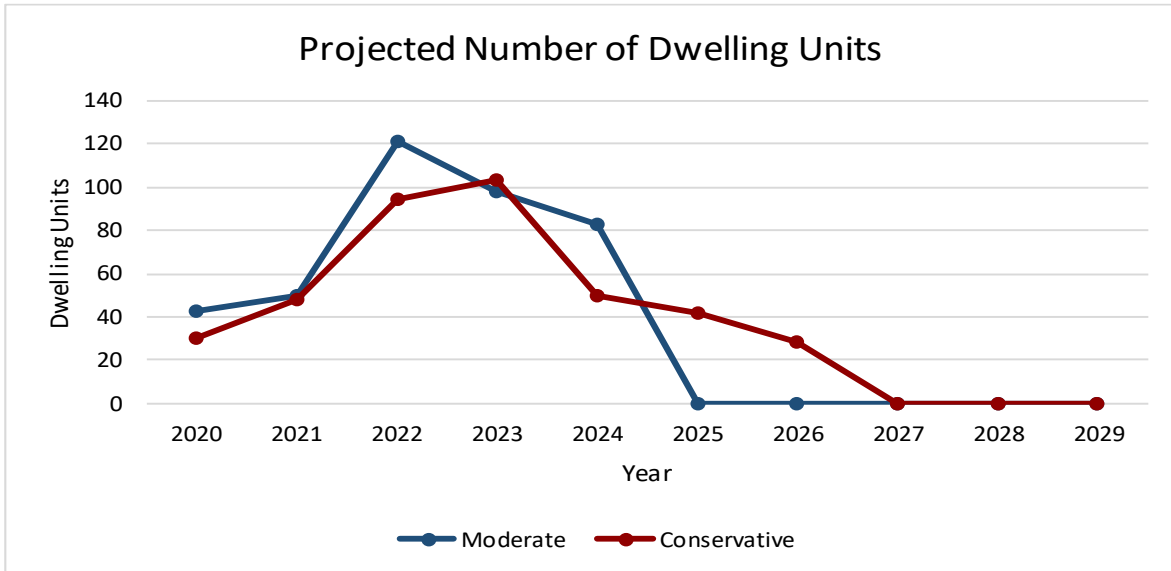


FIGURE 3

The locations of each of these future residential development projects is shown in the map below. Please note that the exact location of these new development projects may be refined as additional information is made available.

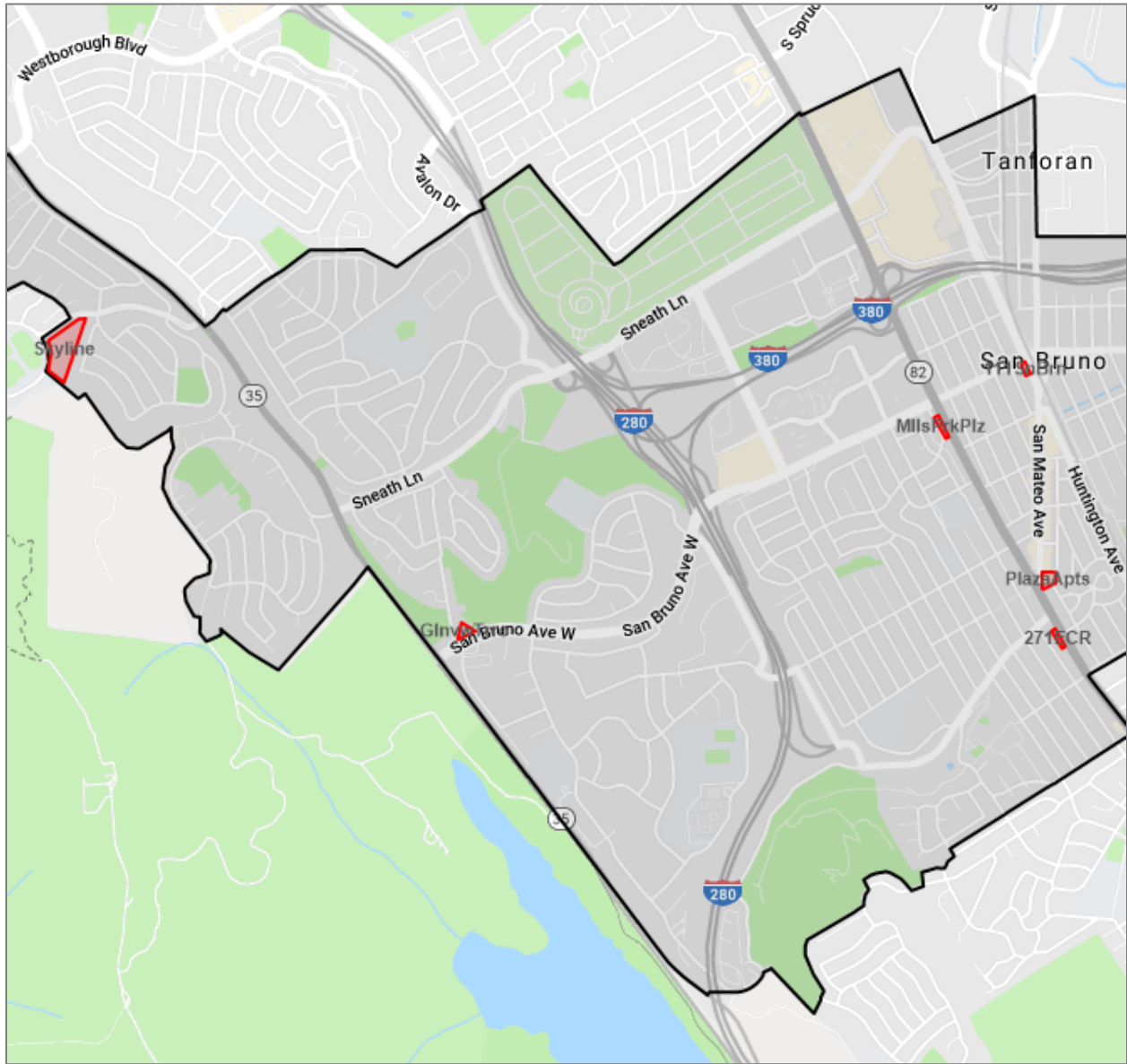


FIGURE 4

STUDENT GENERATION RATE ASSUMPTIONS

Student generation rates are determined for each dwelling unit type for each school level (elementary, middle, and high where applicable). The student generation rates applied to this projection are DecisionInside's default rates, which have been prepared based on a comprehensive review of recently-constructed dwelling units with similar characteristics. The table below shows the student generation rate assumptions by unit type. Although these student generation rates are broken out by a K-5, 6-8 grade configuration, the calculated student impact from new development within the enrollment projection studies will be aligned with each school's defined grade configurations.

Student Generation Rates by Unit Type & School Level			
School Level	SFD Units	SFA Units	MF Units
Elementary School (K-5)	0.30	0.21	0.14
Middle School (6-8)	0.08	0.07	0.06
Totals:	0.38	0.28	0.20

FIGURE 5

A full list of the student generation rates applied over the next five years within the Conservative DU Scenario is shown in Appendix A.

PROJECTED STUDENTS FROM NEW RESIDENTIAL DEVELOPMENT

To calculate the projected student enrollment from the new residential development planned within the district, the number of each unit type was multiplied by the appropriate student generation rates for each of the next five years. The geographical location of each project is utilized to calculate the student impact by studyblock, which ultimately determines which schools we would anticipate being impacted. For each school level, students generated by new residential development are distributed across grade levels. These percentages are based on historical patterns where they exist; otherwise, default percentages are used. Furthermore, student matriculation is considered to accurately model the student impact over the enrollment projections studies' five-year timeframe. The results of these operations for the Conservative DU Scenario is shown in the table below.

Grade	2020	2021	2022	2023	2024
K	1	3	6	9	11
1	1	3	6	9	11
2	1	3	6	9	11
3	1	3	6	9	10
4	1	2	5	8	10
5	1	2	5	8	10
6	1	2	5	7	9
7	1	2	4	7	8
8	0	1	3	6	8
Elementary:	4	15	33	52	62
Middle:	2	5	12	20	25
Total:	6	20	45	72	87

FIGURE 6

The graph below shows the projected student enrollment from the new residential development within the Conservative DU Scenario. More detailed information on the projected numbers of students generated by project and by studyblock can be accessed online.

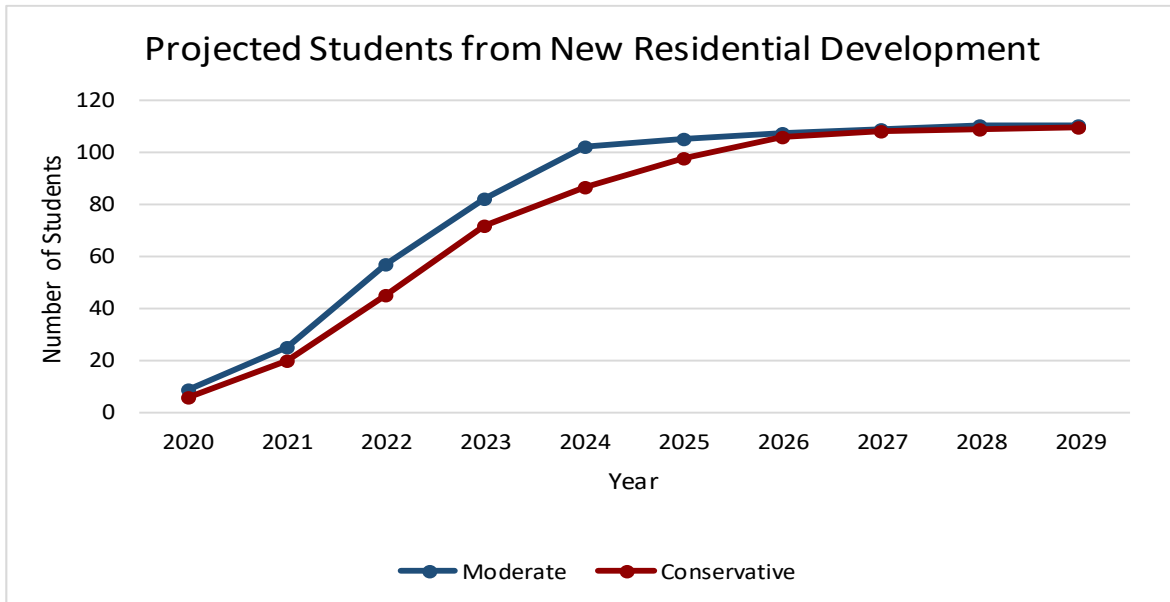


FIGURE 7

ANALYZING/STUDYING/REVIEWING THE RESIDENTIAL DEVELOPMENT RESEARCH REPORT

The projections of district and school enrollment are based on a complex mix of historical data, recent trends, and specific assumptions regarding the future, including new residential development as outlined in this report. At DecisionInsite, we strongly encourage our clients to actively engage with the data with the aim of better understanding, further refining, and using the results to inform decisions about to be made. We believe increased effectiveness for both the district and DecisionInsite comes with increased and welcome dialogue.

Graphs or tables may be copied from the PDF version of this document using the Snapshot Tool inside PDF Reader.

Please do not hesitate to contact DecisionInsite regarding any questions or suggestions that may arise regarding this report.

Respectfully Prepared and Submitted by:

The **DecisionInsite** Team

August 15, 2019

APPENDIX A

STUDENT GENERATION RATE ASSUMPTIONS

Unit Type	School Level	2020	2021	2022	2023	2024
SFD	Elementary	0.30	0.30	0.30	0.29	0.29
SFD	Middle	0.08	0.08	0.08	0.08	0.08
SFD	High	0.14	0.14	0.14	0.14	0.14
SFA	Elementary	0.21	0.21	0.21	0.21	0.21
SFA	Middle	0.07	0.07	0.07	0.07	0.07
SFA	High	0.09	0.09	0.09	0.09	0.09
MF	Elementary	0.14	0.14	0.14	0.14	0.14
MF	Middle	0.06	0.06	0.06	0.06	0.06
MF	High	0.10	0.10	0.10	0.10	0.10