



## ORANGE COUNTY DEPARTMENT OF EDUCATION

### Orange County Committee on School District Organization (County Committee)

#### **Request for Information Criteria Questionnaire Capistrano Unified School District**

#### **Lomas Laguna Homeowners Association Petition for Transfer of Territory from the Saddleback Valley Unified School District to the Capistrano Unified School District**

This request for information has been prepared for the purpose of gathering information related to the Lomas Laguna HOA Petition proposing to transfer certain territory from the Saddleback Valley Unified School District to the Capistrano Unified School District. Responses submitted may be used by the County Committee to evaluate whether to recommend approval or disapproval of the petition.

**It is requested that the responses be returned as soon as possible, but no later than Wednesday, July 3, 2024:**

#### **Signed Original to:**

Orange County Department of Education  
Dean West, Secretary to the County Committee  
200 Kalmus Drive  
Costa Mesa, CA 92626

#### **Electronic (Word Doc) version:**

Melanie Inskeep, Manager, Business Services Email: [minskeep@ocde.us](mailto:minskeep@ocde.us)

**The County Committee may approve the petition, if the County Committee finds that the conditions enumerated in Education Code section 35753(a)(1)-(10) and California Code of Regulations (CCR) Title 5 § 18573. Criteria for Reorganization of School Districts are substantially met.** Each School District is requested to respond as comprehensively as possible with information relevant to each criterion. The questions listed below each criterion are designed to solicit pertinent information but may not be applicable in every case. The questions are not intended to limit the School District's response.

**CRITERION #1**

**Education Code section 35753(a)(1): The reorganized districts will be adequate in terms of number of pupils enrolled.**

**5 CCR 18573(a)(1):** It is the intent of the State Board that direct service districts not be created which will become more dependent upon county offices of education and state support unless unusual circumstances exist. Therefore, each district affected must be adequate in terms of numbers of pupils, in that:

(A) Each such district should have the following projected enrollment on the date that the proposal becomes effective or any new district becomes effective for all purposes: Elementary District: 901; High School District: 301; Unified District: 1,501

(B) The analysis shall state whether the projected enrollment of each affected district will increase or decline and the extent thereof.

1. Based on Certified Fall 1 data from the California Longitudinal Pupil Achievement Data System (CALPADS), please provide historical enrollment trends for the school district: **REVISED**

**2023-2024: 40,836**

**2022-2023: 41,855**

**2021-2022: 42,754**

**2020-2021: 43,719**

2. Is the projected enrollment of the school district anticipated to increase or decline over the next five years and to what extent?

**Enrollment is projected to have a mild decline over the next five years with some leveling off in some of the years.**

3. How many students reside from the proposed area? **Capistrano Unified does not know the total number of students.** How many students are enrolled in the school district from the proposed area? **The proposed area currently enrolls eight (8) students in Capistrano Unified School District on interdistrict transfer from Saddleback Unified School District. The students are each in grades TK,3,5,6,8,9,11 and 12.**

4. What are the projections for future residential development and/or changes in demographic trends (e.g., new facilities moving in) in the proposed transfer area? **As this area is part of Saddleback Unified School District, Capistrano Unified School District does not follow development in that area. However, this approximately 35 acre area appears to be fully built out as part of a planned community.**

5. What schools are assigned to or would be assigned to the proposed area if the Petition is approved? For each school identified, please provide the enrollment capacity for each school.

- a. Elementary School(s):  
Wood Canyon ES. capacity 819 (with portable classrooms)
- b. Middle School(s):  
Don Juan Avila MS capacity 1,311 (with portable classrooms)
- c. High School(s):  
Aliso Niguel High School capacity 3,167 (with portable classrooms)

6. Other information relevant to this criterion:  
None

**CRITERION #2**

**Education Code section 35753(a)(2): The school districts are each organized on the basis of a substantial community identity.**

**5 CCR 18573(a)(2):** To determine whether the new district is organized on the basis of substantial community identity, the following criteria should be considered: (A) Isolation, (B) Geography, (C) Distance between social centers, (D) Distance between school centers, (E) Topography, (F) Weather, (G) Community, school, and social ties and other circumstances peculiar to the area.

- 1. Are there any unique circumstances or characteristics peculiar to the proposed transfer area that significantly define its community identity?  
None, however the area is in a different City.
- 2. How does the proposed area in comparison to the adjacent areas contribute to community identity (e.g. architecture, size, and/or style of homes)?  
Area and surrounding areas are very similar.
- 3. What is the approximate distance between major social centers (e.g., community centers, parks, recreational facilities) and the proposed transfer area?  
The development appears to be a planned community and is close to parks and other recreational areas.
- 4. What are traffic patterns and public transportation systems and routes that may have an impact on community identity?  
Capistrano Unified School District would not have this detailed information. The area is served by OCTA for public transportation.
- 5. What are the geographical or topography features (e.g., hills, valleys, plains) of

the proposed transfer area that may impact community identity?

The area is very similar to surrounding neighborhoods.

6. Are there any city council, county supervisor or special district electoral districts that may impact community identity?

The transfer area is in the city of Laguna Hills that is entirely within the Saddleback Valley Unified School District whereas the adjacent area in Capistrano Unified School District is in the city of Aliso Viejo

7. What zip code(s) are used in the proposed area and surrounding areas?

The zip code 92656 serves the subject area.

8. Other information relevant to this criterion:

None

### **CRITERION #3**

**Education Code section 35753(a)(3): The proposal will result in an equitable division of property and facilities of the original district or districts**

**5 CCR 18573(a)(3):** To determine whether an equitable division of property and facilities will occur, the California Department of Education will determine which of the criteria authorized in Education Code Section 35736 shall be applied. It shall also ascertain that the affected districts and the county office of education are prepared to appoint the committee described in Education Code section 35565 to settle disputes arising from such division of property.

1. Does the school district currently have any outstanding bonded indebtedness? Please provide details, including the nature of the indebtedness, amounts, and how this indebtedness might impact the equitable division of property and facilities in the proposed transfer area.

Capistrano Unified currently has Measure A (GO bond) debt that is approximately \$6 per \$100,000 of assessed value for areas of the District that were not in a CFD at the time the bond measure was approved by voters. The bond ends in 2026.

2. Has the district incurred any other forms of long-term debt, such as Certificates of Participation (COPs)? Please specify the details of such debts and their implications for the proposed territory transfer.

The District currently has two COPs.

One for a solar project with about 20 years remaining.

One for various high school projects and the District Office.

As the area proposed was not in a CFD it would not be subject to any rebalancing of debt and would only be subject to the Measure A GO bond debt

that will end in 2026.

3. What is the district's long-term strategic plan for managing and developing school facilities in the area proposed for transfer?  
There would be no plans for any school development in that area.
4. Are there any existing or upcoming plans for implementing Mello-Roos taxes in the proposed transfer area or in the school district?  
No, not from Capistrano Unified School District. It is unknown if the development currently is subject to CFD levies from Saddleback Valley Unified or another government agency.
5. Other information relevant to this criterion:  
None

#### **CRITERION #4**

**Education Code section 35753(a)(4): The reorganization of the school districts will preserve each affected district's ability to educate pupils in an integrated environment and will not promote racial or ethnic discrimination or segregation.**

**5 CCR 18573(a)(4):** To determine whether the new districts will promote racial or ethnic discrimination or segregation, the effects of the following factors will be considered:

- (A) The current number and percentage of pupils in each racial and ethnic group in the affected districts and schools in the affected districts, compared with the number and percentage of pupils in each racial and ethnic group in the affected districts and schools in the affected districts if the proposal or petition were approved.
- (B) The trends and rates of present and possible future growth or change in the total population in the districts affected, in each racial and ethnic group within the total district, and in each school, of the affected districts.
- (C) The school board policies regarding methods of preventing racial and ethnic segregation in the affected districts and the effect of the proposal or petition on any desegregation plan or program of the affected districts, whether voluntary or court ordered, designed to prevent or to alleviate racial or ethnic discrimination or segregation.
- (D) The effect of factors such as distance between schools and attendance centers, terrain, and geographic features that may involve safety hazards to pupils, capacity of schools, and related conditions or circumstances that may have an effect on the feasibility of integration of the affected schools.
- (E) The effect of the proposal on the duty of the governing board of each of the affected districts to take steps, insofar as reasonably feasible, to alleviate segregation of minority pupils in schools regardless of its cause.

1. Based on the Certified Fall 1 2023-24 data from the California Longitudinal Pupil Achievement Data System (CALPADS), please provide the following information regarding socio-economic data for the District and for each school that would be affected by the transfer:

	Socio-Economically Disadvantaged (SED)	English Learner (EL)	Free or Reduced Price Meal (FRPM)
District	13,841	3,607	13,630
Wood Canyon ES	213	61	213
Don Juan Avila MS	260	39	257
Aliso Niguel HS	812	117	796

2. Based on the Certified Fall 1 2023-24 data from CALPADS, please provide the following information regarding race/ethnicity for the District and for each of the affected schools: **REVISED**

	Asian	Hispanic/Latino	White	Other*
District	2,776	11,041	21,267	5,752
Wood Canyon ES	27	154	154	75
Don Juan Avila MS	155	180	408	148
Aliso Niguel HS	345	575	1,311	377

\*The "Other" category includes "African American," "American Indian or Alaska Native," "Filipino," "Pacific Islander," and "Two or More" or "Not Reported."

3. What is the projected growth or change for each racial and ethnic group district wide and in each affected school if the petition is approved. Change in District and schools is expected to remain the same.
4. Please describe the school district's policy on interdistrict attendance permits? Capistrano Unified's policy and process for interdistrict transfer can be found at this link: <https://www.capousd.org/subsites/Safety--Student-Services/Student-Placement/Interdistrict-Transfer-Requests/index.html>

a. How many students enrolled in the School District are on an interdistrict permit?

874

b. How many students who reside in the proposed area are on an interdistrict permit? What school districts are the students on interdistrict permit enrolled? Eight (8) students in the proposed area are enrolled in Capistrano Unified School District on an interdistrict transfer.

5. Other information relevant to this criterion: None

**CRITERION #5**

**Education Code section 35753(a)(5): Any increase in costs to the state as a result of the proposed reorganization will be insignificant and otherwise incidental to the reorganization.**

**5 CCR 18573(a)(5):** The proposal or petition shall not significantly adversely affect the educational programs of districts affected by the proposal or petition. In analyzing the proposal or petition, the California Department of Education shall describe the districtwide programs, and the school site programs, in schools not a part of the proposal or petition that will be adversely affected by the proposal or petition.

1. Please describe what impact, if any, would the proposed transfer of territory have on the following factors:
  - a. Basic aid status: None
  - b. School facilities: None
  - c. Special or categorical aid programs: This impact would depend on the students that live in the proposed area and the services they may require and could be significant.
  - d. Home-to-school and/or special educational transportation costs and state reimbursements: This impact would depend on the students that live in the proposed area and the services they may require and could be significant.
2. Other information relevant to this criterion: None

**CRITERION #6**

**Education Code section 35753(a)(6): The proposed reorganization will continue to promote sound education performance and will not significantly disrupt the educational programs in the affected districts.**

1. Please describe what impact, if any, would the proposed transfer of territory have on educational performance and the continuity of education programs in the school district? For example, the number of Advance Placement courses offered, accreditation by the Western Association of Schools and Colleges, and the

California Dashboard. **There would be no impact to current programs.**

2. Other information relevant to this criterion: **None**

### **CRITERION #7**

**Education Code section 35753(a)(7): Any increase in school facilities costs as a result of the proposed reorganization will be insignificant and otherwise incidental to the reorganization.**

1. Are school facilities costs expected to change as a result of the proposed reorganization? Please provide an analysis or projection of any anticipated cost variations, and indicate whether these changes are likely to be insignificant or incidental to the reorganization. **No**
2. Would the school district find it necessary to open or close any schools as a result of the proposed reorganization? Please consider school capacity and whether affected schools operate on a traditional, single track or multi-track schedule. **No**
3. Are there adequate existing school facilities to accommodate future students in this area? Please explain. **Yes. Schools that would serve this area can accommodate the students generated by the area.**
4. Please explain the impact, if any, of developer fees for this area. **None that we know of**
5. Other information relevant to this criterion: **None**

### **CRITERION #8**

**Education Code section 35753(a)(8): The proposed reorganization is primarily designed for purposes other than to significantly increase property values.**

1. How does the proposed reorganization align with the objective of not being primarily designed to significantly increase property values? **Property values are impacted, in part, by the quality of schools serving an area. Schools that currently or would serve the area, should the transfer take place, are very similar in rankings that are made available to the public, with exception of the high school. It does not appear that there would be a significant impact on property values.**
2. **Is there any information from the County Tax Assessor's Office or local real estate firms that may provide insight on the impact on property values if the territory transfer is approved?**  
**Saddleback Valley Unified School District's scores on a realty website are: Linda Vista Elementary school 6/10**



La Paz Intermediate School 8/10  
Laguna Hills High School 7/10

Capistrano Unified School District's scores on the same realty website are:  
Wood Canyon Elementary School 6/10  
Don Juan Avila Middle School 8/10  
Aliso Viejo High School 9/10

3. Other information relevant to this criterion: **None**

**CRITERION #9**

**Education Code section 35753(a)(9): The proposed reorganization will continue to promote sound fiscal management and not cause a substantial negative effect on the fiscal status of the affected district.**

1. If the proposed transfer of territory is approved, what impact, if any, would the transfer of territory have on the school district's fiscal status for the current and succeeding years? **The fiscal impact to Capistrano Unified is unknown as it would depend on the students that live in the proposed transfer area and the services they may require.**
2. Other information relevant to this criterion: **None**

Date Completed: June 26, 2024

Signature: 

Title: Deputy Superintendent