



## ORANGE COUNTY DEPARTMENT OF EDUCATION

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

#### **Request for Information Criteria Questionnaire Saddleback Valley 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:

2023-2024: 23,221

2022-2023: 23,706

2021-2022: 24,390

2020-2021: 24,924

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

SVUSD enrollment is expected to decrease over the next 5 years to 21,330.

3. How many students reside from the proposed area? How many students are enrolled in the school district from the proposed area?

There are currently 36 students from the proposed area enrolled in SVUSD schools. An additional 8 students are enrolled in CUSD, for a total of 44 students residing in the area. We are unaware of students enrolled in private schools or homeschooling.

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?

To our knowledge there is no future residential development proposed for this area as it is a fully built out 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): Linda Vista International Baccalaureate Elementary School, 732 capacity

- b. Middle School(s): La Paz Intermediate School, 955 capacity

c. High School(s): Laguna Hills High School, 1689 capacity

6. Other information relevant to this criterion:

## **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?

There are no unique circumstances or characteristics to the proposed area. The Lomas Laguna HOA area of Laguna Hills is similar to areas throughout the city with rolling hills.

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)?

The area is similar to all others in the adjoining vicinity; this is one of the few areas with single family homes in the immediate vicinity, as other communities are condos and townhomes.

3. What is the approximate distance between major social centers (e.g., community centers, parks, recreational facilities) and the proposed transfer areas?

It is close to recreation, parks, and community shopping centers in the Laguna Hills area. The nearest shopping center is across the street in Laguna Hills.

4. What are traffic patterns and public transportation systems and routes that may have an impact on community identity?

The area is served by OTCA for public transportation. There are numerous multi-lane roads serving the area, HOA, and SVUSD schools. The high school is located 1.4 miles from the HOA center.

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 similar to the surrounding area and neighborhoods with hills.

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

The Lomas Laguna housing area is located within the city of Laguna Hills, while the proposed adjacent area is in the Aliso Viejo community.

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

The zip code is 92656, the same as other surrounding areas of Laguna Hills.

8. Other information relevant to this criterion:

### **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.
  - A. Yes, the Measure B Bond balance is currently \$74,370,000 outstanding; the obligation is set to be paid off in 2030. The district is working to determine how the petitioned area proportionate share would be allocated throughout the district.

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.

There are no other forms of long term debt.

3. What is the district's long-term strategic plan for managing and developing school facilities in the area proposed for transfer?

There are no plans for new school facilities in the area. The District Facility Master Plan guides facility management and upgrades. Upgrades are ongoing at facilities throughout the district.

4. Are there any existing or upcoming plans for implementing Mello-Roos taxes in the proposed transfer area or in the school district?

No

5. Other information relevant to this criterion:

#### **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	10460	3624	10407
Elementary School	224	116	223
Middle School	295	54	295
High School	805	291	804

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:

	Asian	Hispanic/Latino	White	Other*

District	2159	9108	8652	3279
Elementary School	8	198	50	22
Middle School	47	227	314	119
High School	81	732	438	150

\*The “Other” category includes “African American,” “American Indian or Alaska Native,” “Filipino,” “Pacific Islander,” and “Two or More.”

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.

With 30-40 students from the petition area spread across the 14 grade levels, the overall district impact is minimal. The impact on the intermediate and high schools is minimal due to their larger populations.

At the elementary school the impact is greater. There are 15 students from the petition area attending district elementary schools, with 7 students attending Linda Vista elementary; the race/ethnicity of those students include 6 identified as “Other”, 1 Asian, 4 White (non-hispanic), and 4 Hispanic/Latino. If the petition was granted, the White and “Other” subgroups percentages at the elementary school would decrease while the Hispanic/Latino subgroup percentage would increase as shown below.

Elementary Enrollment	Enrollment	Asian	Hispanic/Latino	White	Other
With petition area	278	8 (2.8%)	198 (71%)	50 (17.9%)	22 (8%)
Without petition area	271	8 (2.8%)	196 (72.3%)	48 (17.7%)	19 (7%)

4. Please describe the school district’s policy on interdistrict attendance permits?

While students traditionally attend a school assigned within their District of Residency, there is a process for applying to attend a school in an outside district through Inter-District Transfer requests. These requests are annual and must be approved by both the resident and receiving districts. The process begins with the District of Residency, and the approved transfer is valid for one year only, requiring annual renewal. An approved Inter-District Transfer must be in place between both districts before a student can attend the desired school.

When a student's residence changes, the parent or guardian must notify the school of the new address. Transportation and childcare responsibilities fall to the parent or guardian. Students admitted to SVUSD through an Inter-District Transfer are assigned to schools with available space at the discretion of the SVUSD administration. All students and schools must adhere to California Interscholastic Federation (CIF) athletic eligibility rules and regulations, and approved transfers do not imply any waiver of CIF rules.

If a false address or other pertinent information is provided for enrollment, the transfer will be immediately revoked, and notice will be given to the student and parent or guardian. If an Inter-District Transfer request is denied, the decision can be appealed to OCDE within 30 calendar days. The transfer committee will consider requests based on the submission date and reasons provided. Denial letters will be issued by Student Services if a transfer is denied.

Transfers are granted based on space availability, with priority given to students requesting programs not available at their resident school and those in good academic and conduct standing. SVUSD reserves the right to deny transfer requests or release students due to adverse impact on ethnic balance, insufficient state aid, lack of employment documentation, insufficient facilities, lack of suitable special education programs, or unsatisfactory attendance or scholarship history.

Inter-District attendance agreements are non-tuition unless Federal Impact Aid is involved, with financial apportionment for regular education students credited to the district of attendance. For special education students, funding agreements between districts follow the AB 602 funding model, and transfers do not authorize the release of special education funds from SVUSD to the receiving district.

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

For the 2023/24 school year, there were 1,451 students enrolled in the Saddleback Valley Unified School District on an interdistrict permit.

- 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?

There are 8 students from the proposed area currently attending CUSD schools on a interdistrict transfer.

5. Other information relevant to this criterion:



**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:

The district is within a few years of entering basic aid status, but the petition area impact upon this would be negligible.

- b. School facilities:

With the decreased enrollment from the transfer territory, there would be a potential impact upon the services provided at Linda Vista Elementary or another elementary school. Given decreased enrollment there may be a need to consolidate elementary schools to decrease costs at schools with lower enrollment.

- c. Special or categorical aid programs:  
Minimal impact.
  - d. Home-to-school and/or special educational transportation costs and state reimbursements:

Minimal costs.

2. Other information relevant to this criterion:

**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.

As students are spread across a number of district schools the impact on educational performance would be minimal. The greatest impact would be at the elementary school level, where the decreased enrollment at our elementary school would possibly lead to consolidation of schools. As Linda Vista is the only International Baccalaureate elementary school in the district and a small school, losing enrollment at that school is impactful. If the petition were approved, lower elementary enrollment could lead to program consolidation.

2. Other information relevant to this criterion:

**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.

Negligible

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.

The decreased enrollment would impact Linda Vista elementary school. This could increase the likelihood that enrollment in the school would need to be consolidated with another elementary school.

3. Are there adequate existing school facilities to accommodate future students in this area? Please explain.

Yes, the district is able to accommodate all current and projected students from this area and within the district, for at least the next decade.

4. Please explain the impact, if any, of developer fees for this area.

Minimal as the area is already a fully built out community.

5. Other information relevant to this criterion:

#### **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?

Home prices are similar in both areas.

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?

No.

3. Other information relevant to this criterion:

**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?

Minimal impact.

2. Other information relevant to this criterion:

Date Completed: \_\_\_\_\_

Signature: \_\_\_\_\_

Title: \_\_\_\_\_