INFORMATION SHEET

NO. G-11

DATE : July 6, 2016

CATEGORY : General

SUBJECT : School Impaction Fee Administration

PURPOSE : To establish a Department of Building Inspection procedure for:

1. Identifying those projects subject to the fee.
2. Determining the square foot area to be assessed a fee.
3. Communicating assessable area information to the San Francisco Unified School District (SFUSD).
4. Issuing a permit for the project upon verification of fee payment.

REFERENCE : California Government Code Section 65996-65998, 53080 (AB 2926, Chapter 887 1986 Statutes)
California Education Code Section 17620-17626

Procedure

I. Certification of payment of School Facility Fees form:

1. New Construction, additions, conversions and alteration projects - This Certification of Payment of School Facility Fee Form 100 is always required, without exceptions.

2. Statutory Exemptions [Section III(2)- Residential Additions of 500 Square Feet or Less] – For projects that conform, school fee payment is not required. However, this Form 100 is required to document the exemption status of conforming projects. On the front of Form 100, Plan Checker shall state the total area square feet, initial, and write NO SCHOOL FEE under the SFUSD Fee column. Developer/Owner/Authorized Agent shall complete Sections I and II, but does not need to sign Section IV. The form submittal process follows steps outlined in accordance with Item 1 or Item 2 below, whichever is applicable. However, there is no fee payment to be collected.
3. Other Statutory Exemptions listed on Form 100A - For projects that conform, school fee payment is not required. However, both this Form 100 and SFUSD Certification of Statutory Exemption Form 100A are required to document exempt status of conforming projects. The Developer/Owner and Plan Checker shall both complete Form 100. Property Owner shall complete and sign Form 100A. Both Forms 100 & 100A shall then be submitted to SFUSD for review and approval, following the applicable submittal process of Step 1 or Step 2 below.

II. When School Facility Fee payment is required:

1. Submitted Plan Review - Applicant completes Sections I & II of Form 100 and submits to Central Permit Bureau (CPB) Clerk in addition to the submittal documents and plans. Unce plan review, Plan Checker completes Part III, staples a copy with the application and places the completed form in the Plan Review Section’s (PRS) 2nd Floor SFUSD collection box. The forms will be delivered to 1st Floor CPB for emailing to SFUSD for fee calculation and approval.

2. Over-the-Counter Plan Review (OTC) - Applicant completes Sections I & II of Form 100 and submits to the OTC Plan Checker. During plan review, Plan Checker completes Section III, staples a copy with the application and places completed copy in the OTC 6th Floor SFUSD collection box. The forms will be delivered to 1st Floor CPB for emailing to SFUSD for fee calculation and approval. (Note: To speed up the process, applicant for over-the-counter permit may drop off complete School Facility Fee form, including contact’s name and either cellular phone number or email address at the School Fee Counter of CPB on the 1st Floor. Applicant may call CPB after the 6th day regarding status). The applicant retains the submittal documents and completes the review process with the appropriate review stations and agencies. Even if all agency approvals are secured, applicant cannot pay for the permit until the form has been processed and approved by SFUSD.

3. Turnaround time at SFUSD is six (6) business days – [Note: SFUSD has five (5) business days to return the fee calculation sheet to DBI from the date CPB submitted to SFUSD Office. Allow at least one (1) additional day for CPB processing.]

4. Approval of SFUSD Form – SFUSD calculates the Fee, approves the form and email it back to CPB. CPB will then update the Permit Tracking System (PTS) School Fee payment status under the Permit Application No. (PA#). The building permit cannot be issued until DBI receives the Fee approved by SFUSD.

5. Status Check for School Fee Calculation - Applicant may call CPB at (415) 558-6070 to verify the School Facility Fee has been approved by SFUSD.

6. Payment of School Fee for Submitted Plan Review - School Fees will be collected by IPR and CPB as part of the building permit payment process. At time of Fee payment, applicant signs Form 100, Section IV. After applicant paid for the building permit and School Fee, IPR and CPB will stamp "PAID" on original form and make four (4) more copies, as follows:
   a) Original form will be attached to the applicant’s form.
   b) One (1) copy will be provided to the applicant.
   c) Three (3) copies will be submitted to Finance Services with payment receipt of the building permit.
7. Payment of School Fee for OTC Plan Review - Applicant will pick up the approved School Fee form from 1st Floor CPB. Applicant takes School Fee form and the approved permit documents, which have been in applicant's possession, to the 5th Floor OTC Cashier. School Fees will be collected as part of the building permit payment process. At time of Fee payment, applicant signs School Fee form, Section IV.

8. Disagreements over Area Calculation for Submitted Plan Reviews - Disagreements and disputes shall be addressed prior to payment of the building permit fees. When plans have already been routed to CPB for permit issuance, request that the permit documents be re-routed from CPB to the Permit Processing Center (PPC) located on the 2nd Floor. Contact the Plan Checker for a re-check appointment to review the area calculations. If no resolution is reached, applicant may make an appointment with the Technical Services Division (TSD) on the 1st Floor to request a 2nd opinion. All permit documents shall remain in the possession of DBI staff. PRS will internally route plans to TSD for review.

9. Disagreements over Area Calculation for OTC Reviews - Disagreements and disputes for OTC projects shall be addressed with the Plan Checker. Applicant may request a 2nd opinion from an OTC Supervisor on the 5th Floor.

10. DBI's responsibility in disputes is only to provide area calculation. All other disputes over Fee assessments will be handled by the SFUSD.

11. Refund of School Fee – If a refund is required because the project is cancelled or the project scope and calculated area is reduced, CPB shall e-mail the revised FORM 100 to SFUSD. SFUSD will confirm that payment has been received prior to issuing a refund. Applicant may call San Francisco Unified School District, Real Estate & Permit Office at (415) 241-6090 to check the refund status.

12. Additional School Fee for Commercial/Industrial Projects– Projects that increase the calculated area after permit issuance will pay additional School Fees for the added area only. Applicant and Plan Checker shall complete a new Form 100. CPB shall email the new FORM 100 and supporting documentation to SFUSD for approval (see #3 above). CPB will collect the additional fee as part of the building permit payment process.

13. Additional School Fee for Residential Projects:

a) Exceeding 500 Sq. Ft. of Habitable Area Originally – Projects that increase the calculated habitable area after permit issuance shall pay additional School Fees for the added habitable area only. Applicant and Plan Checker shall complete a new Form 100. CPB shall email the new FORM 100 to SFUSD for approval (see #3 above). CPB will collect the additional fee as part of the building permit payment process.

b) Not Exceeding 500 Sq. Ft. of Habitable Area Originally (Statutory Exemption) - Projects that increase the calculated habitable area after permit issuance shall pay School Fees for the total habitable area (once it exceeds 500 sq. ft. and it no longer qualifies for statutory exempt status). In cases when the original plus added calculated habitable area together still does not exceed 500 sq. ft. they continue to qualify for statutory exempt status and no Fee will be collected. In all cases, a new Form 100 shall be completed by applicant and Plan Checker and processed by SFUSD. CPB will collect the School Fee only when applicable.
III. Duties and Responsibilities of Plan Reviewer:

1. Not exceeding 500 sq. ft. of habitable area originally:
   Plan Reviewer writes on top of Permit Application form: "SFUSD: XXX sq. ft. <500 sq. ft. N/A," initial and date.

2. Exceeding 500 sq. ft. of habitable area originally:
   Plan reviewer writes on top of Permit Application form: "SFUSD: XXX sq. ft.," initial and date.

3. For other duties and responsibilities, see Sections I and II.

Tom C. Hui, S.E., C.B.O.  
Director  
Department of Building Inspection

7/6/15

Attachments
A: SFUSD Certification of Payment of School Facility Fees – Form 100 (Effective 5/09/16)
B: SFUSD Certification of Statutory Exemption – Form 100A
C: SFUSD Schedule of Applicable School Fees
D: SFUSD Commercial/Industrial Development (CID) Land Use Categories

This Information Sheet is subject to modification at any time. For the most current version, visit our website at http://www.sfdbi.org
### I. APPLICANT (Completed by Applicant)

- Developer/Owner: __________________________ Phone: __________________________
- Or DBA: __________________________ Phone: __________________________
- Mailing Address: __________________________ Zip: __________________________
- Contact Name: __________________________ Phone: __________________________
- Email: __________________________

(Use N/A when no email is available)

### II. SITE INFORMATION (Completed by Applicant)

- Permit Application No(s): __________________________
- Project Site Address or Legal Description: __________________________

### III. AREA/SQUARE FOOTAGE (Completed by Plan Checker)

<table>
<thead>
<tr>
<th>Plan Checker’s Name (Print): __________________________</th>
<th>Tel. No: (415) __________________________</th>
</tr>
</thead>
<tbody>
<tr>
<td>Email: __________________________ @sfgov.org</td>
<td>Total Area Square Feet: __________________</td>
</tr>
<tr>
<td></td>
<td>DBI Initials: __________________</td>
</tr>
<tr>
<td></td>
<td>SFUSD Fee: __________________</td>
</tr>
</tbody>
</table>

1. **Residential Construction**
   - Total Habitable Space - New Construction, Additions and Conversions (Space in a structure used for living, sleeping, eating or cooking. Bathrooms, toilet compartments, closets, halls, storage or utility space and similar areas are not considered habitable space)
   - Initials: __________________ SFUSD Fee: __________________

2. **Exemption from fees - additions & alterations with 500 sq. ft. or less of new habitable space, taking into account any decrease in existing habitable space that results from the construction. (If the addition exceeds 500 sq. ft., fees are charged on the entire addition.)**
   - Initials: __________________

3. **New Senior Citizen Housing** (Used exclusively for the housing of senior citizens)
   - Initials: __________________ SFUSD Fee: __________________

<table>
<thead>
<tr>
<th>Commercial/Industrial Construction</th>
</tr>
</thead>
<tbody>
<tr>
<td>New Construction and Additions</td>
</tr>
<tr>
<td>1. Office (See DBI Information Sheet)</td>
</tr>
<tr>
<td>2. Hotel/Motel No.G-11 for use descriptions)</td>
</tr>
<tr>
<td>3. Retail and Services</td>
</tr>
<tr>
<td>4. Research and Development</td>
</tr>
<tr>
<td>5. Industrial/Warehouse/Manufacturing</td>
</tr>
</tbody>
</table>

- Total Fees Due (SFUSD Signature/Date): $ __________________

### IV. Signed by Developer/Owner or authorized agent at time of Fee Payment. The undersigned agrees that:

1. The above information is correct and true to the best of my knowledge and that I will file an amended certification of payment and pay the additional fee if I request an increase in the square footage after the building permit has been issued or if the initial determination of the square footage is found to be incorrect.

2. I am the Developer/Owner of the above described project(s) or I am authorized to sign on their behalf.

- Name: __________________________ Organization: __________________________
- Signature: __________________________ Title: __________________________ Date: __________________________
SCHOOL FACILITY FEE PAYMENT PROCEDURE
Process at: San Francisco Department of Building Inspection, 1660 Mission Street, S.F. CA 94103

CERTIFICATION OF PAYMENT OF SCHOOL FACILITY FEES FORM

1. New Construction, additions, conversions and alteration projects - This Certification of Payment of School Facility Fee Form 100 is always required, without exceptions.

2. Statutory Exemptions (Section III(2)-Residential Additions of 500 Square Feet or Less) – For projects that conform, school fee payment is not required. However, this Form 100 is required to document the exemption status of conforming projects. On the front of Form 100, Plan Checker shall state the Total Area Square Feet, initial, and write NO SCHOOL FEE under the SFUSD Fee column. Developer/Owner/authorized agent shall complete Sections I and II, but does not need to sign Section IV. The form submittal process follows steps outlined in accordance with item 1 or 2 below, whichever is applicable. However, there is no fee payment to be collected.

3. Other Statutory Exemptions listed on Form 100A - For projects that conform, school fee payment is not required. However, both this Form 100 and SFUSD Certification of Statutory Exemption-Form 100A are required to document exempt status of conforming projects. The Developer/Owner and Plan Checker shall both complete Form 100. Property owner shall complete and sign Form 100A. Both forms 100 & 100A shall then be submitted to SFUSD for review and approval, following the applicable submittal process of step 1 or 2 below.

WHEN SCHOOL FACILITY FEE PAYMENT IS REQUIRED

1. Submitted Plan Review - Applicant completes Sections I & II of this Form 100 and submits to Central Permit Bureau (CPB) clerk in addition to the submittal documents and plans. Under plan review, Plan Checker completes Part III, staples a copy with the application and places the completed form in the Plan Review Section’s (PRS) 2nd floor SFUSD collection box. The forms will be delivered to 1st floor CPB for emailing to SFUSD for fee calculation and approval.

2. Over-the-Counter Plan Review (OTC) - Applicant completes Sections I & II and submits to the OTC Plan Checker. During plan review, Plan Checker completes Section III, staples a copy with the application and places another copy in the OTC 5th floor SFUSD collection box. The forms will be delivered to 1st floor CPB for emailing to SFUSD. The applicant retains the submittal documents and completes the review process with the appropriate review stations and agencies. Even if all agency approvals are secured, applicant cannot pay for the permit until the form has been processed and approved by SFUSD.

3. Approval of SFUSD Form – SFUSD calculates the fee, approves the form and emails it back to CPB. CPB will then update the Permit Tracking System (PTS) school fee payment status under the Permit Application No. (PA#).

4. Status Check for School Fee Calculation - Applicant may call CPB at 415/558-6070 to verify the status of the SFUSD school fee payment approval process. Alternatively, applicant can check the status on the Permit Tracking System (PTS) at www.sfdbi.org. To conduct the web search the Building Permit Application No. will be required for input.

5. Payment of School Fee for Submitted Plan Review - School fees will be collected by CPB as part of the building permit payment process. At time of fee payment, applicant signs Form 100, Section IV.

6. Payment of School Fee for OTC Plan Review - Applicant can go to 1st floor CPB to get a copy of the SFUSD approved Form 100 after SFUSD has returned the form to CPB (see item 4 above). Applicant takes Form 100 and the approved permit documents, which have been in applicant’s possession, to the 5th floor OTC cashier. School fees will be collected as part of the building permit payment process. At time of fee payment, applicant signs Form 100, Section IV.

7. Disagreements over Area Calculation for Submitted Plan Reviews - Disagreements and disputes shall be addressed prior to payment of the building permit fees. When plans have already been routed to CPB for permit issuance, request that the permit documents be re-routed from CPB to the Permit Processing Center (PPC) located on the 2nd floor. Contact the Plan Checker for a re-check appointment to review the area calculations. If no resolution is reached, applicant may make an appointment with the Technical Services Division (TSD) on the 1st floor to request a 2nd opinion. All permit documents shall remain in the possession of DBI staff. PRS will internally route plans to TSD for review.

8. Disagreements over Area Calculation for OTC Reviews - Disagreements and disputes for OTC projects shall be addressed with the Plan Checker. Applicant may request a 2nd opinion from an OTC supervisor on the 5th floor.

9. Refund of School Fee – If a refund is required because the project is cancelled or the project scope and calculated area is reduced, CPB shall e-mail the revised FORM 100 to SFUSD. SFUSD will confirm that payment has been received prior to issuing a refund. Applicant may call San Francisco Unified School District, Real Estate & Permit office at (415) 241-6090 to check the refund status.

10. Additional School Fee for Commercial/Industrial Projects – Projects that increase the calculated area after permit issuance will pay additional School Fees for the added area only. Applicant and Plan Checker shall complete a new Form 100. CPB shall e-mail the new FORM 100 and supporting documentation to SFUSD for approval (see #3 above). CPB will collect the additional fee as part of the building permit payment process.

11. Additional School Fee for Residential Projects:
   a. Exceeding 500 Sq. Ft. of habitable area originally – Projects that increase the calculated habitable area after permit issuance shall pay additional School Fees for the added habitable area only. Applicant and Plan Checker shall complete a new Form 100. CPB shall e-mail the new FORM 100 to SFUSD for approval (see #3 above). CPB will collect the additional fee as part of the building permit payment process.
   b. Not Exceeding 500 Sq. Ft. of habitable area originally (statutory exemption) – Projects that increase the calculated habitable area after permit issuance shall pay School Fees for the total habitable area (once it exceeds 500 Sq. Ft. & it no longer qualifies for statutory exempt status). In cases when the original plus added calculated habitable area together still does not exceed 500 Sq. Ft. they continue to qualify for statutory exempt status and no fee will be collected. In all cases, a new Form 100 shall be completed by applicant and Plan Checker and processed by SFUSD. CPB will collect the School Fee only when applicable.
SAN FRANCISCO UNIFIED SCHOOL DISTRICT
CERTIFICATION OF STATUTORY EXEMPTION - FORM 100A

SECTION A - (The property owner(s) must complete and sign this section.)

Property Owner’s Name: ___________________________ Phone: __________
Email: __________________________________________
Mailing Address: __________________ City: __________ State: ______ Zip: _______
Permit Application No(s): __________________________
Project Site Address or Legal Description: ________________

Residential Additions Not Exceeding 500 Sq. Ft. of Habitable Area Originally – The calculation of the size of the addition must take into account any decrease in existing space that results from the construction. If the addition exceeds 500 square feet, fees are charged on the entire addition. (Ed. Code 17620, subd. (a)(1)(C)(i).) DBI Plan Checker will be required to certify the square footage and the exemption on Form 100. Property owner and SFUSD will not be required to complete and sign this Form 100A. Please refer to Form 100 for instructions.

Both Form 100 and Form 100A must be submitted to SFUSD for the following statutory exemptions from fees. By initialing the applicable exemption, the property owner(s) declare that the above project meets the following requirements:

______ 1) The purpose of the modification or expansion of the existing residential housing is to increase access for a severely and permanently disabled person. (Ed. Code 17620, subd.(a)(1)(C)(ii).)

______ 2) Reconstruction of a structure damaged or destroyed by fire, earthquake, landslide, mudslide, flood, tidal wave, etc., where the replacement structure is equivalent to the original structure. District will charge fees for any net increase in square footage that arises from the new construction. (Ed. Code 17626.)

______ 3) Facilities used exclusively for religious purposes and which are thereby exempt from property taxes. (Gov. Code 65995, subd. (d).)

______ 4) Facilities used exclusively as a private full-time day school (including only grades between Kindergarten to 12th grade). (Gov. Code 65995, subd. (d).)

______ 5) Facilities owned and occupied by any federal, state, or local government agency. (Gov. Code 65995, subd. (d).)

______ 6) State-owned housing for migrant farm workers which is subject to a contract ensuring compliance with Section 50710, et seq. of the Health and Safety Code.

The undersigned agrees that: I declare that the above information is correct and true.

Property Owner’s Signature: ___________________________ Date: __________

SECTION B - SFUSD Approval/Denial (To Be Completed by SFUSD)

______ Approved. By:

_____________________________ ____________________
Signature Name Title Date

______ Denied. Reason: ______________________________

_________________________________________________
# SCHEDULE OF APPLICABLE SCHOOL FEES WITHIN SAN FRANCISCO UNIFIED SCHOOL DISTRICT

Statutory School Fees

<table>
<thead>
<tr>
<th>Residential Construction</th>
</tr>
</thead>
<tbody>
<tr>
<td>$ 3.48 per square foot</td>
</tr>
<tr>
<td>$ 0.192 per square foot</td>
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<table>
<thead>
<tr>
<th>Commercial / Industrial Construction</th>
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<tbody>
<tr>
<td>$ 0.388 per square foot</td>
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<tr>
<td>$ 0.540 per square foot</td>
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<tr>
<td>$ 0.536 per square foot</td>
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<tr>
<td>$ 0.478 per square foot</td>
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<tr>
<td>$ 0.485 per square foot</td>
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<tr>
<td>$ 0.192 per square foot</td>
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</tbody>
</table>

Statutory School Fees amounts effective as of August 15, 2016
Commercial/Industrial Development (CID) Land Use Categories

1) Retail and Services

The retail and services category includes commercial establishments which sell general merchandise, building materials, hard goods, apparel, and other items and services to consumers. Additional establishments in the retail and services category include nurseries, discount stores, restaurants, entertainment theme parks, new/used car sales facilities, service stations, supermarkets, banks, real estate sales offices, and similar uses.

2) Office

A general office building houses one (1) or more tenants and is the location where affairs of a business, commercial or industrial organization, professional person or firm are conducted. The building or buildings may be limited to one (1) tenant, either the owner or lessee, or contain a mixture of tenants including professional services, insurance companies, investment brokers, company headquarters, and services for the tenants such as a bank or savings and loan, a restaurant or cafeteria, and service retail and services facilities. There may be large amounts of space used for file storage or data processing.

The office category may also include medical offices that provide diagnoses and outpatient care on a routine basis, but which are unable to provide prolonged in-house medical/surgical care. A medical office is generally operated by either a single private physician or a group of doctors.

3) Research and Development

Research and development facilities are those primarily associated with the application of scientific research to the development of high technology products. Areas of concentration include materials, science, computer, electronic, and telecommunications products. Facilities may also contain offices and fabrication areas. Activities performed range from pure research to product development, testing, assembly, and distribution.

4) Industrial/Warehouse/Manufacturing

Warehouses are facilities that are primarily devoted to the storage of materials. They may also include office and maintenance areas. This category also includes buildings in which a storage unit or vault is rented for the storage of goods. Manufacturing facilities are building structures where the primary activity is the conversion of raw materials or parts into finished products. Size and type of activity may vary substantially from one facility to another. In addition to actual production of goods, manufacturing facilities generally have office, warehouse, research and associated functions. This category includes light industrial facilities such as printing plants, material testing laboratories, assemblers of data processing equipment, and power stations.
5) Hospital

Hospital refers to any institution where medical or surgical care is given to non-ambulatory and ambulatory patients. The term does not however, refer to medical clinics (facilities that provide diagnoses and outpatient care only) or to nursing homes (facilities devoted to the care of persons unable to care for themselves).

6) Hotel/Motel

Hotels and motels are commercial establishments primarily engaged in providing lodging, or lodging and meals, for the general public. As defined by Government Code Section 65995(d), the hotel/motel category includes, but is not limited to, any hotel, motel, inn, tourist home, or other lodging for which the maximum term of occupancy does not exceed 30 days. It does not, however, include any residential hotel as defined by Section 50519(b)(1) of the Health and Safety Code.

Note that CID land use categories may include different industry types. For example, firms in the transportation, communications, or utilities industries may be classified in up to five (5) of the six (6) land use categories shown above.

Similarly, retail firms may also occupy office or industrial space (e.g., for corporate headquarters or warehousing) and manufacturing firms may occupy retail space (e.g., factory retail outlets). In evaluating any given project, the School District should assign the project to whichever CID category is the predominant use within the project.