The California State University Enrollment Demand, Capacity Assessment, and Cost Analysis for Campus Sites

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1.0 Executive Summary

SCOPE OF THE REPORT

The California Budget Act of 2019 tasked the California State University (CSU) Office of the Chancellor, in consultation with the California Department of Finance, to assess the future growth of the CSU by studying the following:

- statewide enrollment demand and physical capacity of the CSU;
- statewide workforce needs and alignment of the CSU's programs with workforce demand;
- the potential for a new CSU campus in the City of Chula Vista, City of Concord, City of Palm Desert, San Joaquin County (Stockton), and San Mateo County; and
- the impacts a new campus would have on the identified regions, the existing CSU system, and related institutions.

This Report was prepared by an independent team of consultants and provides research and analysis to address the issues outlined by the legislation. The information in the Report is intended to be useful to the CSU, and to the Executive and Legislative branches of the State of California, as they consider access to higher education throughout the state to accommodate current and future student enrollment.

SAN JOAQUIN COUNTY SCOPE

This Report applies the same categories of analysis across the regions being considered, with additional focus on San Joaquin County, consistent with the budget allocation. Accordingly, in each of the content sections, additional detail on San Joaquin County is provided. Furthermore, three sites for a new campus in San Joaquin County (Stockton) are considered, with a more detailed outline of options at Stockton University Park in particular.

STAKEHOLDER ENGAGEMENT

In addition to the analysis of available data, the consultant team conducted a series of targeted meetings with stakeholders and with the CSU to collect factual information relevant to the work. Engagement with each of the five identified California regions consisted of full-day meetings with attendees selected by the cities and counties, consisting of city and county leaders, community interest groups, and local stakeholders. Consistent with the appropriation's emphasis on San Joaquin County, the consultant team conducted additional outreach meetings with the City of Stockton and the city-identified stakeholders.

BACKGROUND: THE CALIFORNIA STATE UNIVERSITY

The CSU system is a cornerstone of California's Master Plan for Higher Education. Today, the CSU has 23 campuses with over 481,000 students, who are among the most racially, ethnically, and economically diverse student bodies in the nation. As the nation's largest four-year public university system, the CSU plays a key role in developing the workforce that drives the state economy. Importantly, the CSU also creates economic opportunity by providing broad and affordable access to higher education for underrepresented students who may have few other financially or geographically accessible educational options. Reflecting the broad reach of the CSU system, in 2017–2018, CSU students earned 48 percent of the bachelor's degrees conferred in California and 5 percent of the bachelor's degrees conferred nationally.[1]

State projections indicate that California's workforce will grow over the next decade, although more slowly than in the past, and will shift further toward a knowledge-based economy. In order to support this growth and evolution of the workforce, future jobs in California will require higher levels of educational attainment, including bachelor's and master's degrees. The CSU's ability to serve a wide range of eligible students across the state is essential in providing the higher education preparation required to meet California's projected workforce needs.

1. CSU Office of the Chancellor Institutional Research and Analyses data extraction from NCES IPEDS Data Center, March 2020.

Figure 1.1 Map of Clusters and Evaluated Locations

CLUSTERS

1. North California
2. Chico
3. Sacramento
4. Bay Area
5. Upper Central Valley
6. Central Valley
7. Central Coast
8. Los Angeles
9. Inland Empire
10. San Diego

FIVE EVALUATED LOCATIONS

- A City of Chula Vista
- B City of Concord
- C City of Palm Desert
- D San Joaquin County (Stockton)
- E San Mateo County

THIS REPORT'S USE OF GEOGRAPHIC REGIONS

A variety of regional frameworks have been utilized in the past to administer and evaluate the CSU system. This Report applies a regional approach by using a system of 10 geographic "Clusters" of California counties and their respective CSU campuses. The Clusters are defined by characteristics that inform CSU enrollment, such as driving or transit commute sheds, physical barriers, and state-defined labor market areas. These Clusters set the parameters of assessment. As shown in Figure 1.1, the Clusters are: North California, Chico, Sacramento, Bay Area, Upper Central Valley, Central Valley, Central Coast, Los Angeles, Inland Empire, and San Diego.

Through the Clusters framework, this Report evaluates sociodemographics, enrollment, campus physical capacity, workforce demand, and alignment of academic programs with labor force needs. The Five Evaluated Locations—City of Chula Vista, City of Concord, City of Palm Desert, San Joaquin County (Stockton), San Mateo County—are also analyzed in the context of the Clusters in which they are located, namely Bay Area, Upper Central Valley, Inland Empire, and San Diego. These are referred to as the "Studied Clusters" in the Report.

EVALUATION CRITERIA

This Report uses 17 evaluation criteria to analyze seven separate sites at the Five Evaluated Locations, namely Chula Vista University and Innovation District (San Diego Cluster); Concord Reuse Project Campus District (Bay Area Cluster); CSUSB Palm Desert Campus (Inland Empire Cluster); Stockton University Park (Upper Central Valley Cluster); San Joaquin County Fairground (Upper Central Valley Cluster); Stockton Education and Enterprise Zone (Upper Central Valley Cluster); and San Mateo County CCD – Cañada College (Bay Area Cluster).

The 17 evaluation criteria listed below are organized into four categories:

- Socioeconomic/Industry: Regional Enrollment Demand, Ability to Serve First-Generation Students, Ability to Serve Underrepresented Minorities, Ability to Serve Lower-Income Populations, Regional Workforce/Industry Need.
- Academic: Partnerships with and Impacts on Interrelated Institutions, Alignment with Local Industry.
- Physical/Community: Land Availability, Physical Infrastructure Availability, Campus Accessibility and Surrounding Area Density, Housing Availability, Access to Community Services and Amenities, Environmental Sustainability, Regulatory and Environmental Carrying Capacity Barriers.
- Implementation: Capital Funding Needs, Operational Funding Needs, Timeline of Implementation.

REPORT FINDINGS

KEY OVERALL REPORT FINDING

Projected 2035 enrollment demand alone does not justify the development of a new 7,500 FTES (Full-Time Equivalent Student) CSU campus at any of the Five Evaluated Locations, assuming construction of the physical capacity identified in the approved Master Plans at all 23 campuses is funded. However, funding for the Master Plans is not secured. The Legislature may elect to support investment for expansion in these regions, considering factors in addition to enrollment demand such as equitable access for underrepresented students and alignment between academic programs and workforce demand.

ENROLLMENT DEMAND AND CAPACITY ASSESSMENT

Over the next 15 years, CSU enrollment is projected to increase moderately. This Report projects a systemwide increase of approximately 43,800 FTES (see Table 1.1), after accounting for growth in A-G-qualified high school graduates, community college transfers, and students enrolling from out of state. This projected growth, coupled with new and emerging state workforce demand, underscores the need for expanded forward-looking curricular offerings and increased investment in effective and equitable access to education.

Table 1.1 Enrollment Growth Projections by Cluster (Undergraduate and Graduate/Post-Baccalaureate FTES)

Cluster		Actual 2019	Projected 2035	Change
1	North California	6,500	8,800	2,300
2	Chico	14,800	20,100	5,300
3	Sacramento	25,100	30,200	5,100
4	Bay Area	74,300	79,000	4,700
5	Upper Central Valley	8,400	10,500	2,100
6	Central Valley	29,500	39,900	10,400
7	Central Coast	33,600	39,700	6,100
8	Los Angeles	159,800	156,400	(3,400)
9	Inland Empire	18,100	23,600	5,500
10	San Diego	45,200	50,900	5,700
TOTAL		**415,300**	**459,100**	**43,800**

Source: HR&A Advisors, Inc. (2020).

Today, systemwide CSU enrollment exceeds its legislatively defined physical capacity. Physical capacity, or "Current Capacity" as it is referred to in this Report, is measured based on available classroom and laboratory seats in terms of FTES. When looking solely at these components, there may appear to be some available physical capacity. However, while it varies by campus, systemwide enrollment actually exceeds physical capacity by an average of 17 percent, or 57,300 FTES. Campuses are exceeding capacity shortfall through various means, including alternative instructional modes and use of space types that are not included in the legislated definition of capacity.

Substantial funding is required to increase Current Capacity to meet enrollment demand. The CSU system will need to increase its Current Capacity by approximately 120,500 FTES in order to meet 2035 projected enrollment demand. All Clusters require significant capital and operational investment to increase capacity in order to accommodate projected enrollment demand.

The aggregate Planned Capacity for the existing 23 campuses is sufficient to accommodate the 2035 enrollment demand projection. "Planned Capacity" quantifies the approved Master Plan potential to accommodate enrollment of a given campus measured in FTES. This Report finds that if the CSU is funded to construct all planned facilities identified in its campus Master Plans, the total 2035 enrollment can be accommodated across the system as a whole. However, three Clusters are projected to have enrollment demand exceeding Planned Capacity: Chico (by 27 percent), Sacramento (by 21 percent), and Los Angeles (by a negligible amount). The Chico, Sacramento, and one or more Los Angeles-area CSU campuses require updates to their Master Plans and associated Planned Capacities in order to align capacity with projected enrollment demand. Additionally, Master Plan updates that collectively increase capacity by 10,500 FTES are already in progress at the Chico, Fullerton, and Monterey Bay CSU campuses.

The effectiveness of redirection, a strategy to address enrollment demand by redirecting eligible students to another campus when they cannot be accommodated at their first-choice CSU campus, is lessened by the place-bound nature of many students, the cost of attendance, and the availability of student support services. Unique disciplines offered by selective campuses further complicate redirection. Since it was first made available in Fall of 2019, only 4.5 percent of those eligible accepted offers of redirection. For redirection to become a viable strategy, further investment will be required across the system.

Because the majority of systemwide Planned Capacity is not currently funded, future enrollment demand could be accommodated either at existing campuses or at one or more new campuses. The additional costs associated with building and operating a new campus as compared to expanding an existing campus are noted in Capital and Operating Costs (see below).

WORKFORCE DEMAND AND ACADEMIC PROGRAM

Based on current trends, CSU degree conferral both statewide and in the individual Clusters is generally growing fast enough for the CSU to maintain or improve its share of the degrees needed to meet California's occupational demand for jobs that require at least a bachelor's degree. By 2026, 64 percent of projected CSU graduates will be qualified for the most highly demanded occupations that require a bachelor's degree or higher. The CSU has historically accounted for more than one-third of graduates from California higher education institutions in all of the highest-demand, bachelor's degree-requiring occupations across California, demonstrating the critical value the CSU system provides in training students to meet California's workforce needs. However, two of the Studied Clusters, Bay Area and Inland Empire, are not projected to maintain their campuses' share of graduates in health care-related fields.

Collectively, California's higher education institutions are not producing enough graduates to fully meet California's occupational demand. After accounting for degrees conferred by the CSU and other California institutions, this Report identifies large statewide gaps in supplying graduates for the following four fields:

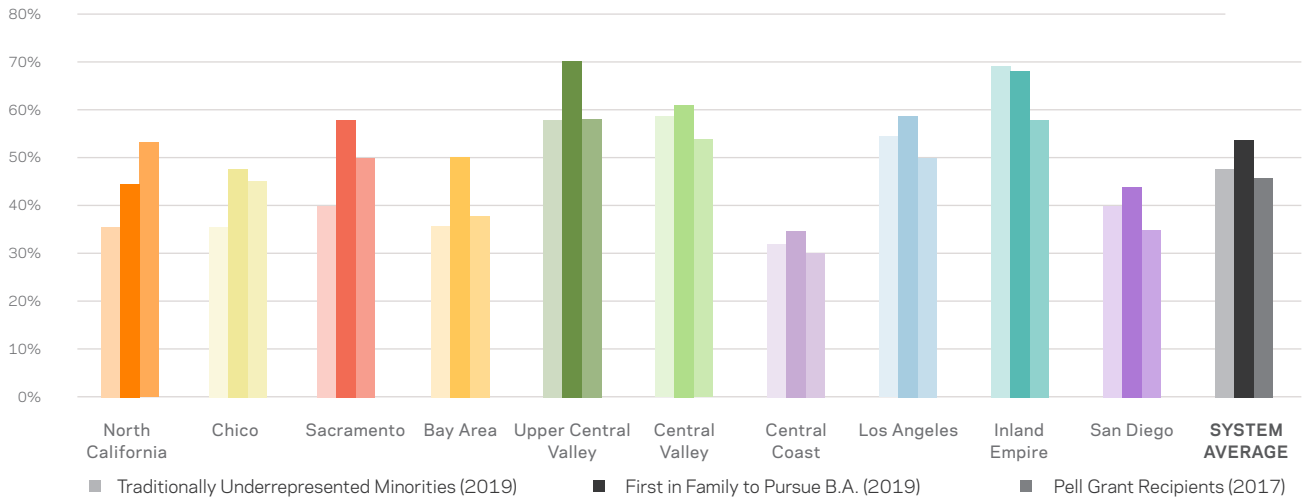
- finance, accounting, human resources, and operations managers (35,900, or 41 percent of positions);
- computer science and math workers (22,400, or 61 percent of positions);
- preK-12 school teachers (15,000, or 51 percent of positions); and
- health care workers (12,300, or 52 percent of positions).

The CSU can help to bridge some of the statewide degree conferral gaps through an increase of available capacity in specific degree programs. While the issues contributing to the degree conferral gaps are complex, ranging from cost to deliver certain degrees, to housing costs, to transportation and regional migration, additional state funding allocations could enable the CSU system to help support California's ability to fill these unmet, higher-skilled positions.

SOCIODEMOGRAPHIC CONDITIONS AND STUDENT ACCESS

CSU campuses have historically served a highly diverse (47 percent traditionally underrepresented minority) and regionally proximate (65 percent from high schools in the same region) population. Enrollment by traditionally underrepresented minorities is highest in the Central Valley, Los Angeles, Inland Empire, and Upper Central Valley Clusters (see Figure 1.2), where these students account for 50 to 70 percent of total enrollment. Systemwide, over half of CSU students are the first in their family to pursue a bachelor's degree, with the highest shares of first-generation students in the Upper Central Valley and Inland Empire Clusters.

Figure 1.2 Traditionally Underrepresented Minorities, First-Generation Students, and Pell Grant Recipients by Cluster



Source: The CSU Institutional Research and Analyses' Enrollment Dashboard. (2020). Student enrollment characteristics.

Impaction, the use of elevated eligibility requirements to manage capacity in the face of capital and operational funding limitations, lessens the CSU's ability to fulfill its equity mission. Impaction limits the acceptance of otherwise-qualified students to high-demand degree programs. As a result, some students are not afforded the same educational opportunities as their peers to earn a degree of their choice closer to home and must pursue their education at other institutions and at higher personal and family cost. Impaction results in fewer available seats, disproportionately and negatively affecting lower-income students.

Equitable access to higher education is affected by campus location and provision of on-campus services. California has seen disparate educational outcomes for first-generation, traditionally underrepresented minority, and lower-income students. Qualified students from these groups are often unable to enroll at a CSU due to lack of transportation, cost of attendance, cost of living, and familial responsibilities.

More dense communities with large-scale transportation networks are best positioned to ensure equal access to a larger region. While the Five Evaluated Locations have relatively low densities and therefore limited public transit accessibility, some are more accessible by transit than others. The Concord Reuse Project Campus District and Stockton University Park sites are currently served by some regional rail transit, and additional transit that will serve the Stockton area is under construction.

All Five Evaluated Locations have the potential to serve first-generation, underrepresented minority, and lower-income populations. Among the Studied Clusters, the Inland Empire and Upper Central Valley Clusters have the highest ability to serve lower-income and first-generation students, and both fall below the state average share of population with higher education degrees. Of all of the Evaluated Locations, the CSUSB Palm Desert Campus has the highest share of historically underrepresented minorities living in close proximity (38 percent, or 215,000 people). San Joaquin County (Stockton) includes the next highest share of underrepresented minorities (34 percent, or 485,000 people).

However, because some existing CSU campuses are located in areas with larger populations, higher densities, and more established transit networks, they may be able to serve larger numbers of lower-income, historically underrepresented minority, and first-generation students than would any of the Evaluated Locations. This will require a determination as to whether the CSU's objective should be to serve the highest total number of lower-income, underrepresented minority, and first-generation students across the state or to create an opportunity in regions with high percentages of these populations that are geographically isolated from public higher education.

Summer enrollment remains largely unattainable for low- to middle-income students who do not have discretionary funds to pay for self-supported courses. Increased summer enrollment could not only further student attainment goals but also allow the CSU to better leverage its existing capacity. However, the state would need to make a long-term funding commitment as a reliable strategy to enable a greater number of students and faculty to participate in the summer term, particularly at campuses with impacted degree programs systemwide.

CAMPUS TYPOLOGIES, LAND AVAILABILITY, AND DEVELOPMENT SCENARIOS

Different campus typologies may be appropriate at different sites. Considerations include physical proximity of nearby CSU campuses, academic program alignment with workforce needs, interrelated institutions, availability of land, and stakeholder preferences. Accordingly, this Report evaluates 1) a Traditional Campus and a Branch Campus (see below) at the Chula Vista University and Innovation District; 2) a Branch Campus and a University Center at the Concord Reuse Project Campus District; 3) a Traditional Campus and a Branch Campus at the CSUSB Palm Desert Campus; 4) a Branch Campus at Stockton University Park; 5) a Traditional Campus at the Stockton Education and Enterprise Zone; 6) a Traditional Campus at the San Joaquin County Fairground; and 7) a University Center at San Mateo County CCD – Cañada College.

This Report determines that in certain cases, a Branch Campus model, one not currently employed at the CSU, may be a more successful campus development scenario than a traditional CSU campus, an Off-Campus Center, or a University Center. A Branch Campus is organizationally linked with a larger, main campus but geographically separate and defined by the following four criteria: 1) It is permanent in nature and located on state-owned land; 2) It offers a complete curriculum resulting in a degree, certificate, or other recognized educational credential; 3) It has its own faculty and an administrative or supervisory leadership entity; and 4) It has its own budgetary hiring authority.

All Five Evaluated Locations have available land suitable for construction of educational facilities at either heavily discounted or no cost. All identified sites have various resilience and sustainability strengths and challenges and can meet or exceed the CSU Sustainability Guidelines established for campus development, albeit at varying cost profiles. A new CSU at any of the Evaluated Locations would be feasible to serve as a catalyst for sustainable development.

Minimum implementation timeline to the first day of classes for the various development scenarios ranges from two to nine years, presuming funding is allocated accordingly. The shortest timelines are at University Centers, where facilities are pre-existing. The next fastest timeline applies at the CSUSB Palm Desert Campus and Stockton University Park sites, where the CSU already has land and existing programs on site, which can be expanded into Branch Campuses.

CAPITAL AND OPERATING COSTS

Planned Capacity cannot be achieved without significant funding for capital construction. The majority of the construction required to realize campus Master Plans is unfunded. This Report estimates that this capital funding would be in excess of $10 billion, excluding costs for deferred maintenance, which would, according to the CSU, exceed $3.7 billion for buildings and infrastructure, excluding costs to upgrade facilities to comply with mechanical and fire/life safety code standards and the Americans with Disabilities Act.

Because there is not sufficient projected enrollment demand to support new 7,500 FTES campuses in the four Studied Clusters beyond what the approved Master Plans accommodate, future enrollment would need to be reallocated from other existing campuses to support the operating costs of a new campus. Capital funding would follow suit, distributed across more campuses. Total state capital funding would need to increase to address 1) land and infrastructure costs and 2) basic instructional support functions required on a new campus.

Capital costs, inclusive of state-support and self-support construction, range from $1.9 to $2.6 billion, depending on the campus typology and location. Debt service for a new 7,500 FTES campus would require substantial allocation of additional funding by the State Legislature to avoid a negative impact on the operating budgets of other CSU campuses. However, all development scenarios have capital costs that are within the CSU General Fund debt limit, as roughly $277 million (6.9 percent of a 12 percent cap) is technically available for annual debt service.

Correspondingly, annual operating costs range from $14,500 to $17,000 per FTES. Adding FTES capacity through investment in a new CSU campus requires a significantly higher share of state funding as compared to increasing FTES capacity at an existing campus. The initial years of new campus operations require high amounts (as much as 300 percent higher per FTES) of state support to fund administration, hire faculty to develop academic programs, and initiate campus operations. At stabilization, a new small campus (7,500 FTES) would require additional budget allocation exceeding $90.0 million annually to avoid a negative impact on the operating budgets of other CSU campuses, a figure that is roughly $24.4 million more (or 35 percent higher) than growing existing campuses by 7,500 FTES.

Per-student funding increases are required to provide workforce-responsive degree programs. Both capital and operating costs needed to provide specialized programs related to computer science, health sciences, and engineering are higher on a per-student basis than most liberal arts programs.

IMPACTS ON IDENTIFIED REGIONS, THE CSU SYSTEM, AND RELATED INSTITUTIONS

CSU campuses, through their payroll, operational, and capital spending, have a significant economic impact on their communities, which is magnified by the impact of CSU alumni who remain in place. Impacts by campus vary based on academic program and overall scale of student enrollment. Redistribution of capacity away from an existing campus in a given Cluster to a new campus in that same Cluster is unlikely to meaningfully change the ongoing economic impact of the CSU in a given region, beyond impacts associated with campus construction.

Local economies vary in composition and size across the Five Evaluated Locations, and differences in the composition of regional economies result in differences in total economic impacts associated with every dollar spent by CSU campuses. Setting aside the redistribution of capacity within a given Cluster, the ongoing annual economic impact of a 7,500 FTES campus could exceed $400 million and include the creation of roughly 2,900 jobs.

However, it is unlikely that a new CSU campus would cause a catalytic change to a local economy, except in a more isolated place than any of the Five Evaluated Locations. The economy of California is highly reliant on CSU graduates, and the CSU system produces qualified graduates exceeding one-third of the occupational demand for many jobs requiring a bachelor's degree. However, CSU campuses generally do not attract new co-located corporate headquarters to the same degree that is typical for research universities or institutions.

Existing CSU campuses with established programs that have a direct workforce/vocational pathway are unlikely to be affected by the creation of a new campus in terms of enrollment demand. However, increases in operational funding to address a new campus are critical to mitigate negatively impacting existing campuses.

The impact of a new CSU campus would be felt most profoundly by potential students. In addition to increasing access to underrepresented populations, proximity to a public institution of higher education creates a pathway to academic success and increased economic opportunity.

It is hoped that the research and analysis contained in this Report provide useful guidance to the CSU, the Governor, and the State Legislature in considering how best to provide facilities needed for the CSU to accommodate current and future student demand in the fulfillment of its critical mission to improve the future of higher education in California.

2.0 Introduction

The California Budget Act of 2019 tasked the California State University (CSU) Office of the Chancellor, in consultation with the California Department of Finance, to assess the future growth of the CSU by studying the following:

- statewide enrollment demand and physical capacity of the CSU;
- statewide workforce needs and alignment of the CSU's programs with workforce demand;
- the potential for a new CSU campus in the City of Chula Vista, City of Concord, City of Palm Desert, San Joaquin County (Stockton), and San Mateo County; and
- the impacts a new campus would have on the identified regions, the existing CSU system, and related institutions.

Accordingly, Volume 1 of this Report consists of the following four content sections:

Enrollment Demand and Capacity Assessment (Section 3) provides sociodemographic context for the state regions where CSU campuses are located, and presents a projection of enrollment demand through 2035, both statewide and by region. The Report analyzes the current and planned physical capacity needed to accommodate current and future enrollment for all CSU campuses.

Workforce Demand, Academic Program, and Campus Typologies (Section 4) assesses statewide and regional workforce demand, projects near-term degree conferral, and evaluates academic program alignment with workforce needs. This section also includes campus typologies and illustrative academic program models, and a discussion of the impact that changes to academic and instructional trends have on physical space allocations.

Evaluated Locations (Section 5) uses 17 evaluation criteria to assess the need for a potential new campus or for growth at existing campuses at each of the Five Evaluated Locations specified in the Budget Act of 2019. Summary charts illustrate the relative alignment of each site to individual criteria.

Implementation at Evaluated Locations (Section 6) provides development scenarios of various alternative campus typologies at seven identified sites, including implementation schedules, capital outlays, operating costs, and funding tools for potential campuses at each of the Five Evaluated Locations. This section also addresses the impacts a new campus would have on the identified regions, the existing CSU system, and related institutions.

Appendix A and **Appendix B** in Volume 2 include additional information and methodological details supporting these sections.

In accordance with the appropriation allocations in the Budget Act of 2019, this Report provides additional detail in the evaluation of San Joaquin County (Stockton) in all four content sections and in the Appendices.

This Report is based on an analysis of data and information available between November 2019 and March 2020. Impacts associated with new or pending legislation or initiatives to increase A-G-qualified students are identified but not quantitatively measured. Similarly, a discussion of potential impacts related to the COVID-19 pandemic is provided in Section 2.4 below, but specific data on long-term impacts to higher education are not available and therefore not incorporated.

2.1 Background

With over 481,000 students, the CSU is the largest four-year public university in the United States, and together with the University of California and the California Community Colleges, creates the backbone of public higher education in the State of California.

The CSU is led primarily by a Governor-appointed Board of Trustees. The Board of Trustees appoints a Chancellor, who acts as Chief Executive Officer (CEO) for the system, and Presidents, each of whom serves as a CEO for one of the 23 individual CSU institutions. Most campuses are comprehensive, two are polytechnic universities, and one is a specialized campus (Maritime Academy). Each of the 23 institutions has, at a minimum, a main campus. In addition to traditional main campus models, the CSU has two models of "satellite" campuses—University Center and Off-Campus Center—that serve to augment its capacity or to offer programs aligned with regional workforce.

The CSU's mission is "to advance and extend knowledge, learning, and culture, especially throughout California," and in particular to provide access to all potential students who are prepared for higher education, promoting opportunities for intellectual and professional growth.[1] The system is also one of the most ethnically and racially diverse higher education institutions in the U.S. In pursuit of its mission, the CSU "seeks out individuals with collegiate promise who face cultural, geographical, physical, educational, financial, or personal barriers." The CSU system has been recognized for the close ties between its campuses and the surrounding regions. This emphasis on regionalism allows CSU campuses to serve the economic and cultural needs of their students, 65 percent of whom attend a campus near their homes. However, due to systemwide constraints associated with state funding, there are limited seats made available to applicants. All but one campus within the CSU system has some degree of "impaction"—the use of elevated eligibility requirements to manage capacity in the face of capital and operational funding limitations. Admission criteria for impacted

1. The California State University. *The Mission of the California State University.* https://www2.calstate.edu/csu-system/about-the-csu/Pages/mission.aspx

programs (or campuses) become increasingly competitive as the number of applicants increases.

Proximity to a CSU campus is widely desirable among community members in regions across the state. Higher education is key to economic mobility and career advancement, and a university campus can make a significant contribution to a community through its economic benefits and educational opportunities. The CSU, with its regional ties and mission to assist those who face barriers, is perceived as a welcome community anchor. However, the CSU has historically struggled to successfully financially support new campuses in regions with minimal enrollment demand. While it has been possible to generate the initial support needed to construct and open new facilities, support for stable operational funding, which is provided directly from the state, can be harder to secure on a reliable basis. In the initial years of a campus's operations, the cost per FTES is higher, due primarily to its limited enrollment. Given the limited annual allocation of funds for the entire CSU system, those campuses operating at higher costs per FTES are under substantial pressure to reduce costs to align with budget availability. This phenomenon is referred to within the system as start and starve, and refers to both new campuses and off-campus centers. In light of the above considerations, the Consultant Team developed a system by which to analyze enrollment demand, workforce demand, and physical campus capacity by geographical Clusters, as explained below.

2.2 Use of Geographic Regions

As noted previously, a variety of regional frameworks have been utilized in the past to administer and evaluate the CSU system. This Report applies a regional approach by using a system of 10 geographic "Clusters" of California counties and their respective CSU campuses, as shown previously in Figure 1.1. The Clusters are: North California, Chico, Sacramento, Bay Area, Upper Central Valley, Central Valley, Central Coast, Los Angeles, Inland Empire, and San Diego. This approach offers a new perspective to regional analysis of the CSU system. Utilizing the Clusters framework, this Report evaluates enrollment demand, campus physical capacity, workforce demand, and alignment of academic programs with labor force needs. The Five Evaluated Locations—the City of Chula Vista, City of Concord, City of Palm Desert, San Joaquin County (Stockton), and San Mateo County—are analyzed in the context of the Clusters in which they are located.

As noted by the California Legislative Analyst's Office, the state does not have established regions for the CSU system, and differing geographies have been used for previous projections of future enrollment demand. For the purposes of this Report, Clusters are defined using criteria that reflect student ability to access a regional/local CSU campus and the boundaries of regional economies that are served by CSU campuses. Factors considered in defining the Clusters include past enrollment by county of high school graduates, drive times to and from campuses, established labor market area boundaries, transportation infrastructure, and physical barriers, including mountain ranges. Some students choose to attend CSU campuses outside their region, particularly students in the Los Angeles, San Diego, and San Francisco metropolitan areas. Central Coast and North California Cluster campuses draw students from across the state for various reasons, including impacted academic programs or campuses. The Clusters reflect the CSU's objective of serving California students with collegiate promise who face barriers to enrollment and may be best served by a regional campus, while also addressing the important role CSU campuses play in meeting regional workforce needs.

2.3 Process

REPORT PREPARATION PROTOCOL

In November 2019, the CSU commissioned a team of professionals, with HOK as the lead consultant in partnership with HR&A Advisors, mode associates, Mercury, MGAC, and Kimley-Horn (Consultant Team) to conduct the analysis required to respond to the State Legislature's direction and produce this Report. In addition to the analysis of available data, the Consultant Team conducted a series of targeted meetings with stakeholders at each of the Five Evaluated Locations and with the CSU to collect factual information relevant to the work.

For these meetings, and for all communication related to this Report, the Consultant Team, together with the CSU and the California Department of Finance, established guiding principles for the Report.

Guiding Principles

- Independence: The study was to be independent and data driven, free of influence by the CSU or by outside parties.
- Constraints and Boundaries: The engagement meetings were defined by basic constraints, including the length of in-person engagements in each location.
- Consistency: Categories of stakeholder groups and discussion topics were determined based on the information needed for the Report and remained consistent across the Five Evaluated Locations.
- Standardization: All outreach followed a standardized process and organization.

Communication with External Parties

To ensure that the Consultant Team remained independent from external influence, communication protocols were established at the beginning of the project. These protocols included the formation of a CSU Leadership Group at the Office of the Chancellor to serve as the key point of contact for the various CSU departments and campuses providing information to the study. The Consultant Team identified Mercury (the Consultant Team's community engagement lead) as the sole point of contact for all external communication with the involved municipalities, community stakeholders, and media.

The Consultant Team maintained a website informing the general public of basic project information, including scope and schedule. The website included a place for the public to ask questions and post comments.

Meetings

The project included a series of meetings between the Consultant Team and various parties to obtain information relevant to the study and to report on project status.

Engagement with Stakeholders:

- The scope of work for the project included significant meetings with the five California cities and counties identified in the Budget Act of 2019,[2] including the City of Chula Vista, City of Concord, City of Palm Desert, San Joaquin County (Stockton), and San Mateo County. Mercury organized each of these site visits and stakeholder meetings in partnership with the lead representatives from each city and county. The visits consisted of full-day meetings with attendees, who were identified and organized by the cities and counties, consisting of city and county leaders, community interest groups, and local stakeholders.
- Consistent with the Budget Act of 2019 appropriations, the Consultant Team conducted several additional meetings with the City of Stockton and city-identified stakeholders.

Engagement with the CSU:

- Monthly Leadership Group to receive information related to CSU processes, academic programming, operational modeling, planning, and construction and to provide project status briefings. A representative from the California Department of Finance was included in these meetings.
- One-hour informational discussions with 11 CSU Presidents to gain insight into their campuses' current enrollment landscape, opportunities for enrollment growth, barriers to student access, and vision for the future.

A list of briefings is included in the Appendix.

DATA COLLECTION AND ANALYSIS

The Consultant Team collected and verified data from many sources in the creation of this Report. The data were then used to establish baselines and benchmarks for CSU enrollment, California workforce demand, and existing CSU physical and operational characteristics from which to compare future trends. The first key outcome from this work was the establishment of the regional Clusters to geospatially organize enrollment, workforce, and CSU capacity summaries and 15-year trends.

Methodology

Based upon the findings from the data collection and baseline tasks, the Consultant Team began development of state workforce and enrollment demand projections for each of the regional Clusters. The work entailed a detailed analysis of multiple data sets and statistical modeling to inform projections that were then framed in terms of sensitivities outlined within this Report to account for site-specific and local considerations. In parallel to this work, the Consultant Team conducted analysis of the physical and operational capacity of the existing CSU system to use as a benchmark for comparison to any projected enrollment growth. This physical capacity analysis was conducted across the entire CSU system as well as within the regional Clusters.

Once the workforce and enrollment demand projections were completed, the Consultant Team compared the existing CSU campuses' physical and operational capacities to the projected enrollment growth to determine any need for added physical campus capacity within the regional Clusters. This summary of projected enrollment growth, in comparison to the existing CSU campuses' capacities by regional Cluster, answers one of the most important questions outlined in the California Budget Act of 2019 and forms the basis for the strategies for CSU growth outlined in this Report.

2.4 Impact of COVID-19 Pandemic

The majority of the data for this Report was collected and analyzed by the Consultant Team during the period from November 2019 through March 2020. In December 2019, the first novel coronavirus (COVID-19) outbreak was identified, and it quickly spread across the world and became a declared pandemic. On January 26, 2020, the first case of COVID-19 was confirmed in the State of California, and in March 2020, California Governor Newsom issued statewide stay-at-home orders to slow the spread of COVID-19 across the state. COVID-19 has transformed almost every aspect of life in the United States and across the world, including higher education. Upon the Governor's emergency declaration, the CSU transitioned to a majority of instruction, operations, and services being delivered remotely for the balance of the academic year. On May 12, 2020, the CSU was the first large university in the nation to announce plans to continue to deliver the majority of instruction remotely in the Fall of 2020. Universities across the country quickly followed suit.

This Report relies on information related to population, workforce demand, statewide and regional economies, socioeconomic equity, and the physical capacity to deliver higher education within the CSU system. It is too soon to identify whether short-term changes in operational responses to the health crisis will result in permanent changes in CSU operations, and if so, in what ways and how any such changes could alter the information used as the basis for this Report. While some believe the pandemic will create long-lasting and disruptive changes, others believe it is merely an accelerant for change that is already underway. Some of the ways COVID-19 could impact topics at the root of this Report include the following:

2. The California Legislature Act that made appropriations for the support of state government for the 2019–2020 fiscal year. The Budget Act of 2019 (as amended), Chapter 363 of the Statutes of 2019 (Senate Bill 109), Section 75, Item 6610-001-0001, Provision Articles 1.5 (.c) and (1.5.d) are the sections that apply to the CSU, enumerating appropriated funds to increase CSU enrollment and to provide a review of the Five Evaluated Locations.

Enrollment Demand

Although still evolving and largely unprecedented, COVID-19 is likely to impact enrollment across the CSU system and this Report's forecast of enrollment demand. The most similar and recent precedent that has occurred is the Great Recession in 2008. Enrollment in the CSU system leading up to the Great Recession grew roughly 2 percent on average year over year, largely in alignment with growth in state funding. Between 2008 and 2009, enrollment dropped by 1 percent and then by 5 percent between 2009 and 2010, due to reductions in funding and because of impaction—increased eligibility requirements and reduction in freshmen seats in certain degree programs. The tax revenue and associated funding impacts of COVID-19 have the potential to be more significant than those of the Great Recession, but their long-term impact on educational and societal practices have no recent precedent. For community colleges, evidence shows that there was a spike in enrollment during the economic turmoil from the Great Recession, as students used the time to expand their skillsets by accessing less costly higher education opportunities. Any similar swelling of community college enrollment resulting from COVID-19 could eventually lead to a higher than average number of CSU-eligible students.

Workforce Demand

There is no modern precedent for the current impact of COVID-19 on California's economy, although the continued closure of non-essential businesses to suppress the pandemic has already resulted in significant unemployment and economic disruption in California and across the United States. The California job market's ability to recover from the losses it is facing is contingent upon the reopening of non-essential businesses, but the timeline for complete reopening and economic recovery is unclear, as public health continues to be a priority. The California Economic Development Department data used in this Report for workforce analysis do not integrate the potential impacts of a global health pandemic in the forecast of occupational demand in California through 2026. The California Budget and Policy Center projects that the types of occupations most likely to be impacted by closure of businesses due to COVID-19 include large shares of lower-skilled and low-wage positions that do not require a bachelor's degree. This may limit changes to the projections utilized in this Report, and therefore the correspondence between future workforce demand and CSU degree conferral. However, there is also potential for increased demand for occupations associated with essential businesses, such as health care workers, for which CSU degrees are aligned.

Instructional Delivery and Physical Capacity

The nationwide shift to remote instruction resulting from the COVID-19 pandemic has increased discourse regarding its effectiveness. Historically, online course delivery represented approximately 4 percent of total enrollment. In Spring 2020, the CSU pivoted systemwide to 100 percent of its instruction being delivered remotely. Synchronous, asynchronous, and hybrid models are options for providing curricular offerings for all enrolled students, with participants spread across the globe. Some have suggested that remote instruction or distance learning could be a cost-effective strategy to increase access for those who are not in close proximity to an existing physical campus. A data-driven study, specific to the course types and offerings that would be provided online, to address the accessibility, efficacy, costs, and socioeconomic outcomes of distance learning, may be appropriate in advance of any systemwide implementation of distance learning as a long-term solution for remote populations. Impacts on the critical relationship addressed in this Report between enrollment and physical capacity also need to be studied. The first true data set will be available at the end of Fall 2020. The CSU tracks equity gaps for every course and will be able to begin to conduct an appropriate analysis at that time.

3.0 Enrollment Demand and Capacity Assessment

This section of the Report begins with a summary of sociodemographic characteristics of regional populations and the characteristics of current CSU students, as context for a 15-year enrollment projection. Next, the section presents analysis of Current Enrollment, Current Capacity, and Planned Capacity at CSU campuses. It also includes an assessment of the suitability of existing capacity metrics and opportunities for and barriers to achieving greater space utilization at existing campuses. The third part of this section (3.3) presents the conclusions of a detailed projection of future CSU enrollment through 2035 within the 10 defined regional Clusters. The section concludes with comparisons between projected enrollment and Planned Capacity by Cluster and land assessments for the campuses in the Chico, Sacramento, and Los Angeles Clusters.

3.1 Sociodemographic Context

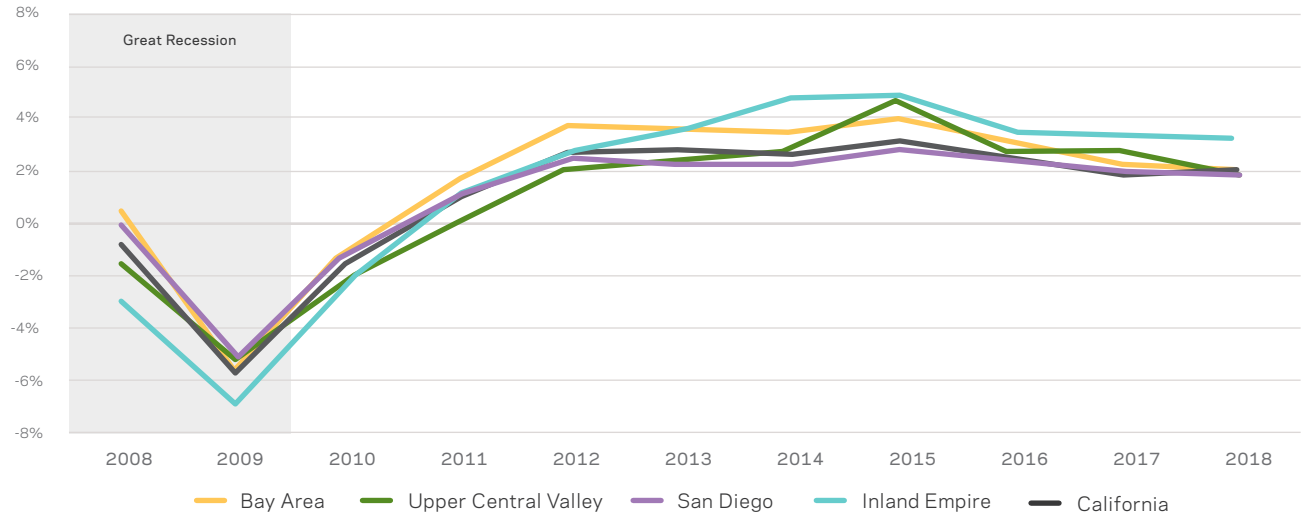
This section provides general population growth and sociodemographic context for the state, individual Clusters, the four geographic Clusters that contain the Five Evaluated Locations ("Studied Clusters"—Bay Area, Upper Central Valley, Inland Empire, San Diego), and San Joaquin County, as background for the projection of future CSU enrollment. The sociodemographic context of potential CSU students and their families is critical to understanding student ability to access higher education opportunities, and therefore future enrollment. The CSU's mission to prepare "significant numbers of educated" graduates requires serving a broad range of California's population. This Report analyzes where the state is growing over time, and income and economic mobility characteristics that affect student ability to afford, migrate, or otherwise aspire to attend a CSU campus. These and racial/ethnic characteristics vary widely by Cluster and within Clusters, and may inform decisions about future investments that achieve the CSU's priority to close the "equity gap."[1]

3.1.1 STATEWIDE SOCIODEMOGRAPHIC CONTEXT BY CLUSTER

POPULATION CHARACTERISTICS

Following the depth of the 2007–2009 Great Recession, statewide population grew by approximately 11.4 percent over the subsequent decade. Among the Studied Clusters, the largest population growth between 2008 and 2018 occurred in the Inland Empire Cluster (18.3 percent), which added approximately 230,000 residents (see Figure 3.1), indicating potential growth in the number of future CSU students. The Bay Area Cluster also grew faster (17.8 percent) than the state average, adding 612,000 residents between 2008 and 2018, the latest year for which uniform Cluster-level data are available. Between 2008 and 2018, the San Diego and Upper Central Valley Clusters grew 10.9 percent and 11.9 percent, respectively, more slowly than the Bay Area and Inland Empire Clusters and closer to the statewide average (11.4 percent). San Diego and Bay Area Cluster stakeholders noted increasing traffic and housing costs as a result of this growth.

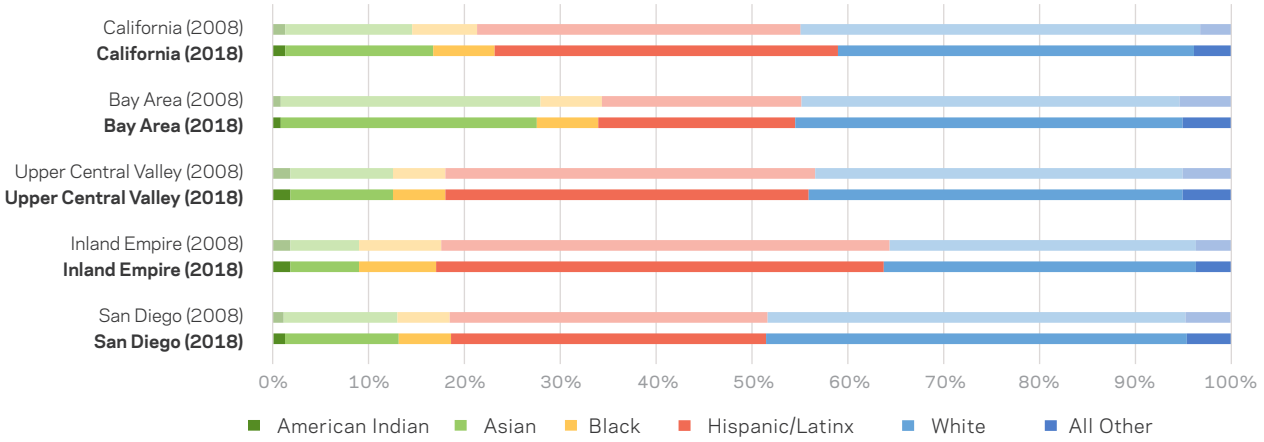
Figure 3.1 Population Growth by Studied Cluster (2008–2018)



Source: U.S. Census Bureau. (2019). American Community Survey 5-Year Estimates (2013–2018).

1. The California State University. (n.d.). *Redefining Historically Underserved Students in the CSU: Moving Beyond Race and Economic Status to Close Equity Gaps.* http://www.dashboard.csuprojects.org/rethinkingthegap/Historically-Underserved-Student-Factor-Model.pdf

Figure 3.2 Race/Ethnicity by Studied Cluster (2008 and 2018)



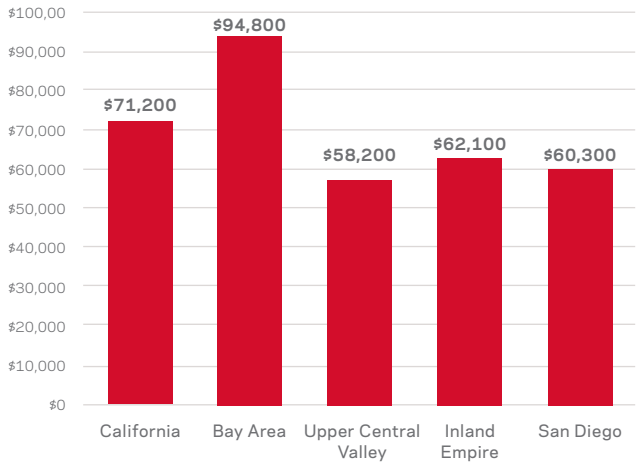
Source: Emsi. (2020). Population demographics data.

The four Studied Clusters have not mirrored California's racial/ethnic demographic shift toward increased shares of Asian and Hispanic/Latinx residents (see Figure 3.2). The Bay Area Cluster has the highest share of Asian residents of the Studied Clusters, accounting for 26 percent of its total population, as compared to 15 percent statewide. The Inland Empire Cluster has a notably high share of Hispanic/Latinx residents, comprising nearly half of its population (46 percent compared to the statewide average of 35 percent). The demographics of the Upper Central Valley and San Diego Clusters more closely mirror the state.

INCOME CHARACTERISTICS

Household median income, which affects student ability to afford tuition and associated higher education costs, varies significantly among the 10 Clusters, ranging from a low of $46,400 in the North California Cluster to a high of $94,800 in the Bay Area Cluster (see Figure 3.3). The Bay Area Cluster is an outlier among the Studied Clusters, which have median household incomes of roughly $60,000. Even within Clusters, county median household income can vary widely. For example, within the Bay Area Cluster, median household income by county ranges between $76,000 (Sonoma County) and $116,000 (Santa Clara County). San Mateo County, one of the Five Evaluated Locations, has a significantly higher median household income ($113,800) than the Bay Area Cluster as a whole ($94,800), whereas Contra Costa County (containing another Evaluated Location) has a median household income of approximately $93,700, slightly below the Bay Area Cluster median. Within the San Diego Cluster, the relative variation is even greater: The median household income is nearly $75,000 in San Diego County, but only $45,800 in Imperial County, compared to a Cluster-wide median of $60,300. Of the campuses within Clusters where future enrollment is expected to exceed Master Plan capacity by 2035 (see Table 3.10 Section 3.5), the Chico Cluster serves the second lowest income community of existing campuses ($49,600 median household income), and the Los Angeles and Sacramento Clusters fall below the statewide average ($61,200 in the Los Angeles Cluster, $70,000 in the Sacramento Cluster, $71,200 statewide).

Figure 3.3 Median Household Income in Studied Clusters (in 2018 Inflation-Adjusted Dollars)

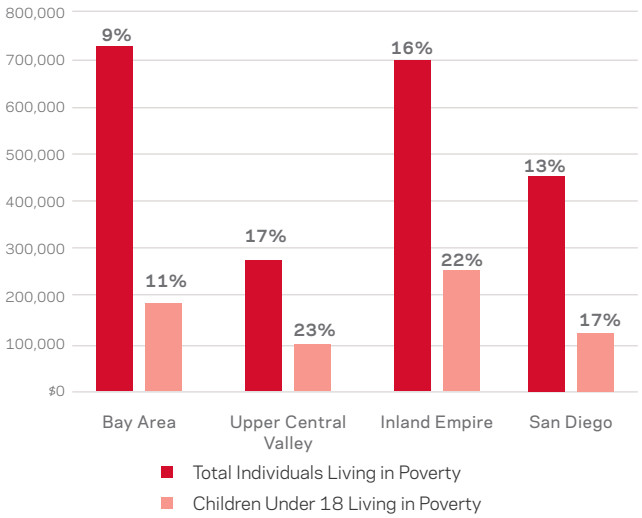


Source: U.S. Census Bureau. (2019). American Community Survey 5-Year Estimates (2013-2018).

Stakeholders in each Studied Cluster noted disparities in the distribution of wealth among their communities, which are described in further detail in Appendix B.1. Lower-income students attending CSUs in wealthier Clusters, such as those in coastal regions, face additional barriers related to substantially higher fees and other costs, such as housing.

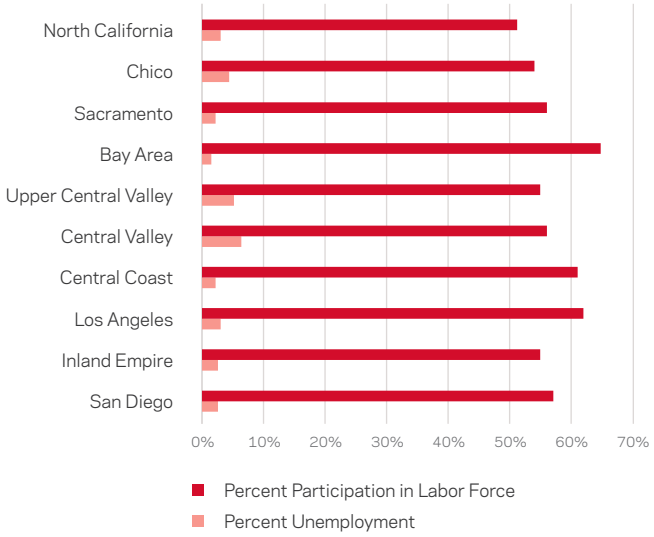
This Report uses an assumed commute shed of 45 minutes by both drive and public transit use for each of the campus locations. This is not intended as a commentary of the available time in a given day or vehicle availability across sociodemographic circumstances, but rather as a mechanism to analyze an Evaluated Location's ability to provide access to various underserved populations within that geographic boundary. Throughout the CSU system, over half of all campuses serve communities in which household income and educational achievement are below statewide medians ($74,000 median income and 42 percent with an associate's degree or

Figure 3.4 Population in Poverty and Children Under 18 in Poverty (2018) in Studied Clusters



Source: U.S. Census Bureau. American Community Survey 5-Year Estimates (2013-2018)

Figure 3.5 Participation in the Labor Force (2018) in All Clusters



Source: Emsi. (2020). Labor force data.

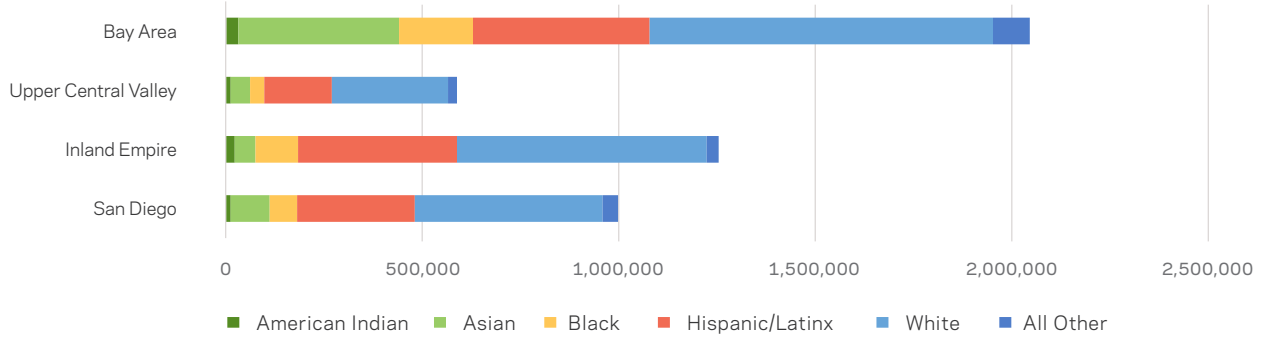
higher).[2] The Bakersfield campus currently serves a population with the lowest educational attainment within a 45-minute drive time (24 percent with an associate's degree or higher) compared to the state average (42 percent), followed closely by the Stanislaus (25 percent), San Bernardino (30 percent), and Fresno (30 percent) campuses. In contrast, all five Bay Area CSU campuses serve communities that are well above the statewide average for household income and educational attainment.

POVERTY RATES

The U.S. Census-defined poverty rate across the state was approximately 14 percent in 2018, with high variation (9 percent in the Bay Area Cluster and 17 percent in the Upper Central Valley Cluster) among Clusters containing the Five Evaluated Locations (see Figure 3.4). The Census poverty rate threshold for a family of four is roughly $26,000; families living in poverty are highly unlikely to be able to support potential students' ability to move away from home for higher education. The rate of poverty in the Upper Central Valley and Inland Empire Clusters is highest, at 17 percent and 16 percent, respectively. The San Diego Cluster most closely resembles the statewide poverty rate at 13 percent, while the Bay Area Cluster has the lowest poverty rate among Studied Clusters, at 9 percent. Despite the Bay Area Cluster's low share of residents living in poverty, it has the highest number of individuals living in poverty, nearly three-quarters of a million residents (see Figure 3.4).

Among children under age 18 across the state, 19.5 percent lived in poverty in 2018. Youth poverty rates in the Upper Central Valley (23 percent) and Inland Empire (22 percent) Clusters are similar to the state average youth poverty rate (19.5 percent). The Bay Area Cluster has the lowest youth poverty rate (11 percent) of the Studied Clusters, followed by the San Diego Cluster (17 percent). In gross terms, the Bay Area Cluster has the second largest number of children under 18 living in poverty (nearly 175,000), only exceeded by the Inland Empire Cluster (260,000).

Figure 3.6 High School Graduates without Higher Education Degrees by Race/Ethnicity for Studied Clusters (2018)



Source: Emsi. (2020). Educational attainment data.

2. Esri ArcGIS Business Analyst (Version 8.1). (2019). *American Community Survey 5-Year Estimates*. 45-minute drive towards the site on a typical Monday at 8:30 a.m.

ACCESS TO OPPORTUNITY

Among Studied Clusters, the Bay Area is a high outlier in terms of participation in the labor force—the working population between ages 16 and 64 who are employed or actively seeking employment—which is an important metric to measure overall participation in the economy (see Figure 3.5). Over 65 percent of the Bay Area Cluster population participates in the labor force and unemployment is 2.4 percent, as compared to the Upper Central Valley Cluster, which has the second highest unemployment rate in the state (4.9 percent in 2018) and a much smaller share of the population participating in the labor force, demonstrating potential for the CSU to support economic mobility and growth in that region.

Across the state, there are approximately 11 million high school graduates who do not have a college degree. The number of high school graduates without a college degree is highest within the Los Angeles Cluster (over 3.6 million). The Bay Area Cluster represents the second largest concentration statewide, with 2.1 million high school graduates without a college degree, followed by the Inland Empire Cluster with over 1.2 million (see Figure 3.6). Across the state, nearly half of all high school graduates without higher education degrees are white and a third are Hispanic/Latinx. This distribution is largely mirrored in the Studied Clusters, although the Bay Area Cluster has a much larger proportion of Asian high school graduates than the statewide average (see Figure 3.6). In both the Upper Central Valley and Inland Empire Clusters, the proportion of white high school graduates without higher education degrees is higher than the statewide average, at 51 percent.

EDUCATIONAL ATTAINMENT

The educational attainment rate, or the share of residents with an associate's degree or higher, affects economic mobility. Of the Studied Clusters, the percentage of the adult population with a higher education degree was highest in the Bay Area Cluster (52 percent) in 2018.[3] The San Diego Cluster also has slightly higher educational attainment (44 percent) than the state average (40 percent). The Inland Empire and Upper Central Valley Clusters fall below the state average, with 28 and 25 percent of the population with a higher education degree, respectively.

Of the Clusters where projected enrollment exceeds Planned Capacity (see Table 3.10 in Section 3.5.), the Chico and Los Angeles Clusters have low rates of educational attainment (26 percent in Chico and 30 percent in Los Angeles) compared to other Clusters, while the Sacramento Cluster (34 percent) falls slightly closer to the statewide average (40 percent) but does not exceed it.

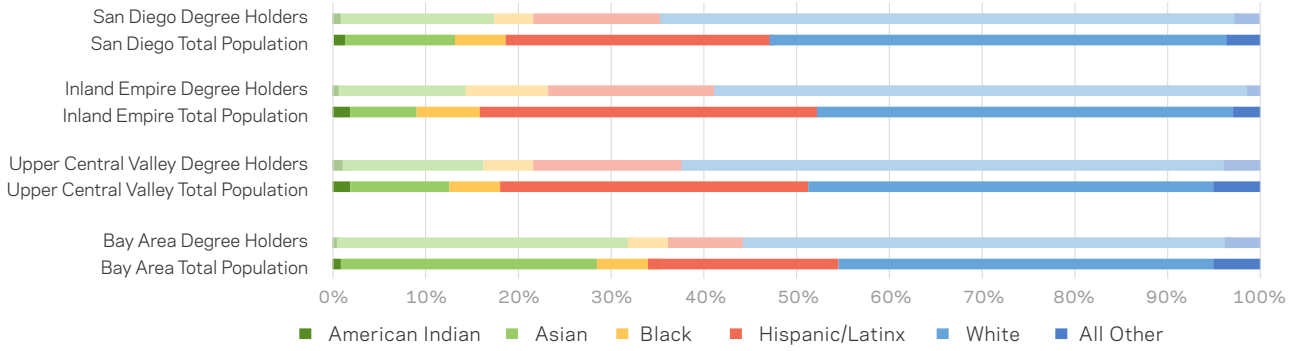
Across the state, white residents are generally overrepresented among college degree holders, and there are disparate educational outcomes for traditionally underrepresented racial/ethnic groups. In 2018, white residents held 54 percent of all degrees statewide, despite making up only 43 percent of the population. Statewide, Asian residents are also overrepresented among college degree holders, holding 24 percent of degrees while representing 17 percent of the population. These trends are consistent within the Studied Clusters (see Figure 3.7). Hispanic/Latinx residents are underrepresented among college degree holders, with only 13 percent of total degrees but 30 percent of the population. In each Studied Cluster, Hispanic/Latinx residents are underrepresented by at least a two to one margin. Black residents are most acutely underrepresented in the Bay Area Cluster, where they make up 6 percent of the population but hold only 4 percent of the degrees (see Figure 3.7).

3.1.2 SAN JOAQUIN COUNTY SOCIODEMOGRAPHIC CONTEXT

In accordance with the appropriation allocations in the Budget Act of 2019, this Report provides additional detail in the evaluation of San Joaquin County (Stockton) in all of the content chapters, including an analysis of the San Joaquin County sociodemographic context in this section.

The total population in San Joaquin County, one of the Upper Central Valley Cluster counties, has grown steadily over the last 10 years (approximately 12.1 percent) to approximately 718,000 people in 2018, slightly faster than the state average (11.4 percent), adding approximately 90,000 residents. Stakeholders in Stockton noted that, although the County's population is growing steadily, Stockton struggles to retain college graduates due to a lack of high-paying jobs.

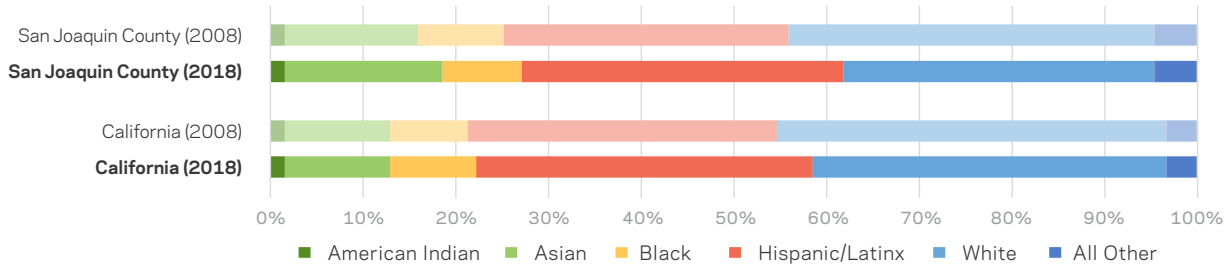
Figure 3.7 Educational Attainment by Race/Ethnicity in Studied Clusters (2018)



Source: Emsi. (2020). Educational attainment data.

3. Emsi. (2020). Educational attainment data.

Figure 3.8 San Joaquin County Race/Ethnicity (2008 and 2018)



Source: Emsi. (2020). Educational attainment data.

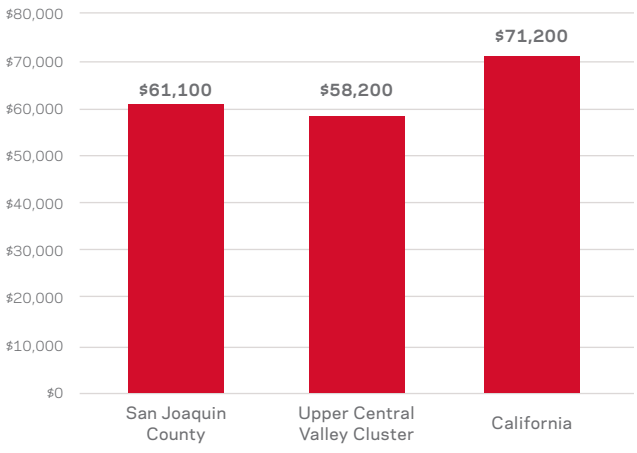
San Joaquin County has mirrored California's increase in share of Asian and Hispanic/Latinx population over the last 10 years (see Figure 3.8). Only the white population has seen a decline in share of total population over the last 10 years (37 percent in 2008 and 31 percent in 2018, a total decrease of approximately 17,000 people). All other racial/ethnic groups have grown in terms of total population and share of the population in San Joaquin County. The demographics of San Joaquin County mirror the Upper Central Valley Cluster and the State of California in that all have seen an increased share of Asian residents and a decreased share of white residents.

Household median income in San Joaquin County is similar to median income in the Upper Central Valley Cluster as a whole, and significantly lower than median household income in California (see Figure 3.9). Stakeholders linked lower household incomes with a need for higher paying, higher skill-level jobs in Stockton. Stakeholders also noted that Stockton's top industries are generally lower paying, with large concentrations of jobs in health care, construction, and agriculture. The San Joaquin County poverty rate (16 percent) is similar to that of the Upper Central Valley Cluster (17 percent), and slightly higher than the statewide poverty rate (14 percent, see Figure 3.10). The share of San Joaquin County children living in poverty follows the same trend: the share of children living in poverty is similar to other counties in the Upper Central Valley Cluster, and slightly higher than the statewide average. As across the state, lower household incomes limit potential students' ability to move or commute to access higher education opportunities.

San Joaquin County participation in the labor force and unemployment rates are also very similar to the Upper Central Valley Cluster overall (see Figure 3.11). In 2018, San Joaquin County and the Upper Central Valley Cluster had the highest unemployment rate of all the Studied Clusters. San Joaquin County and the Upper Central Valley Cluster both have labor force participation rates of 56 percent, notably lower than the statewide average (60 percent). The unemployment rate in San Joaquin County (6 percent) is slightly higher than the unemployment rate in the Upper Central Valley Cluster overall (5 percent) and across the state (4 percent).

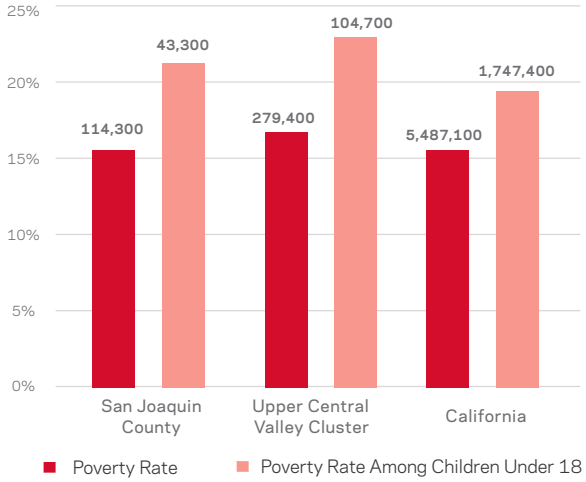
In San Joaquin County, only 26 percent of the population, or 125,000 people, have higher education degrees (compared to 40 percent statewide).[4] White residents in San Joaquin County, similarly to the State of California, are overrepresented among

Figure 3.9 San Joaquin County Median Household Income (in 2018 Inflation-Adjusted Dollars)



Source: U.S. Census Bureau. (2019). American Community Survey 5-Year Estimates (2013-2018).

Figure 3.10 San Joaquin County Population in Poverty and Children Under 18 in Poverty (2018)

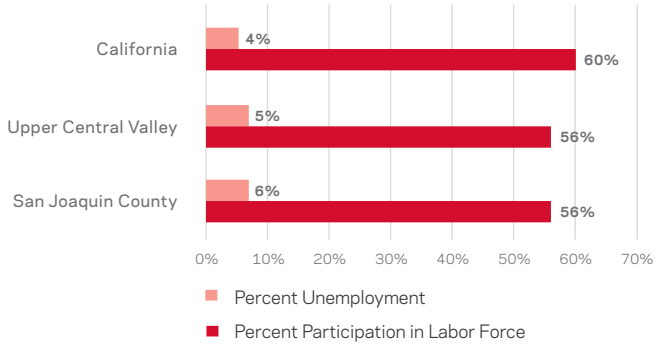


Source: U.S. Census Bureau. (2019). American Community Survey 5-Year Estimates (2013-2018).

4. Emsi. (2020). Educational attainment data.

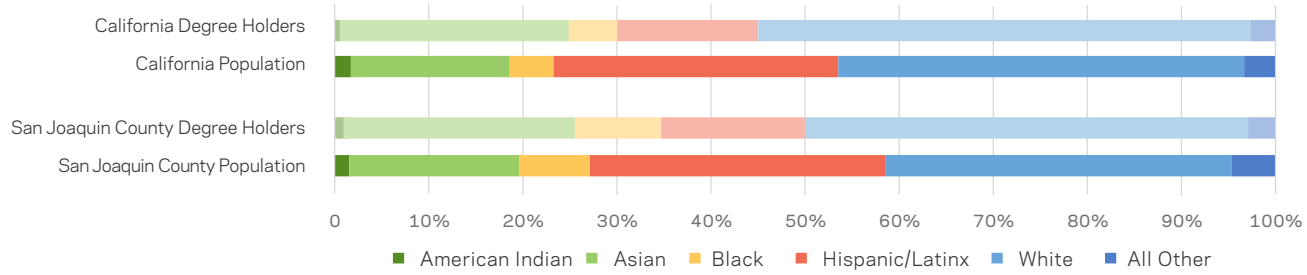
college degree holders, although San Joaquin County has the lowest share of white degree holders (47 percent, see Figure 3.12) compared to all other Studied Clusters (second to the Bay Area Cluster with 51 percent). In San Joaquin County, the share of high school graduates without higher education degrees (51 percent) generally follows a trend similar to the overall demographics of the Upper Central Valley Cluster (52 percent) and is notably higher than the State of California (42 percent).[5] The Upper Central Valley Cluster has the lowest total number of high school graduates (582,000) of the Studied Clusters, with 42 percent of those graduates (242,000) in San Joaquin County. White residents comprise the highest share of high school graduates without higher education degrees, similar to the California and Upper Central Valley Cluster shares.

Figure 3.11 San Joaquin County Participation in the Labor Force (2018)



Source: Emsi. (2020). Labor force data.

Figure 3.12 San Joaquin County Educational Attainment by Race/Ethnicity (2008 and 2018)



Source: Emsi. (2020). Educational attainment data.

5. Other factors such as A-G course requirement, grade point average, and standardized test scores are also factors that determine CSU eligibility, but they are not considered in this section of the Report.

3.2 Current Enrollment and Characteristics

This section of the Report summarizes the enrollment trends and characteristics for the Full-Time Equivalent Students (FTES) at the undergraduate and graduate levels who are currently enrolled in the CSU system. The section presents an analysis of the number of students who have historically enrolled at a CSU within their Cluster, the enrollment levels of traditionally underrepresented students, and the number of students receiving state support. Individual campus enrollment is aggregated and presented at the Cluster level for main campuses and Off-Campus Centers. The Los Angeles, Bay Area, and San Diego Clusters account for two-thirds of systemwide Current Enrollment (see Table 3.1). Thirty-seven percent of the CSU's Current Enrollment is in the Los Angeles Cluster, followed distantly by the Bay Area and San Diego Clusters, where campuses account for 18 and 11 percent of systemwide Current Enrollment, respectively. The CSU's main campuses account for 99 percent of systemwide Current Enrollment.

Current CSU Enrollment

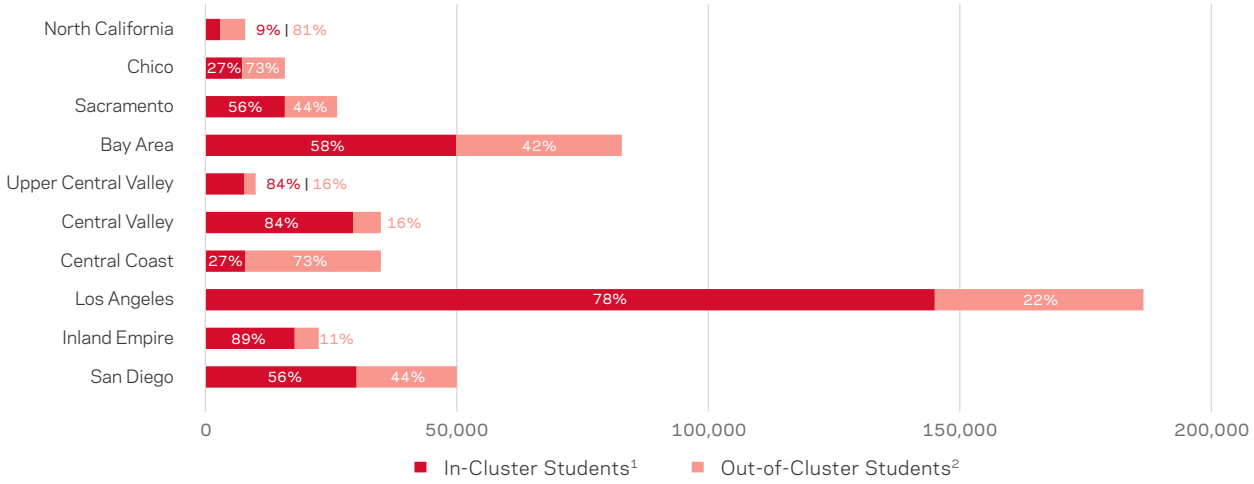
CSU students generally enroll at CSU campuses within the Cluster where they graduated from high school. Seventeen of 23 campuses enrolled more than 55 percent of their students from within their Cluster, and approximately 65 percent of students, systemwide, enroll at a CSU campus within the Cluster where they graduated from high school (see Figure 3.13). Within the CSU system, the largest number by far of students currently enrolled come from the Bay Area and Los Angeles Clusters, followed by the San Diego Cluster, reflecting the overall scale of the state's coastal urban regions (see Figure 3.13). The Central Coast, Chico, and North California Clusters have relatively smaller populations and enroll a relatively small share of CSU students systemwide; seats at these CSU campuses are filled in large part by students from other Clusters.

Table 3.1 Current Enrollment by Main Campus and Off-Campus Center (Fall 2018)

Cluster	Total Current Enrollment (FTES)	Main Campus Enrollment (FTES)	Off-Campus Center Enrollment (FTES)
1. North California	7,357	7,357	-
2. Chico	16,437	16,437	-
3. Sacramento	26,717	26,717	-
4. Bay Area	74,492	74,004	488
5. Upper Central Valley	8,759	8,540	219
6. Central Valley	31,439	30,915	524
7. Central Coast	34,140	34,140	-
8. Los Angeles	155,849	154,584	1,265
9. Inland Empire	17,747	16,907	840
10. San Diego	44,260	43,494	766
Total FTES	**417,198**	**413,096**	**4,102**
Distribution	**100%**	**99%**	**1%**

Source: Office of the Chancellor, The California State University. (2018). *Course Section Report*.

Figure 3.13 Percent Enrollment from In-Cluster Students



1. In-Cluster Students are students who attend a CSU campus located within the Cluster where they graduated from high school.
2. Out-of-Cluster Students are students who attend a CSU campus located outside of the Cluster where they graduated from high school.

Source: The CSU Institutional Research and Analyses' Enrollment Dashboard. (2019). Origin of enrollment data.

CSU Student Characteristics

Throughout the CSU system, campuses average 47 percent enrollment by traditionally underrepresented minorities, including African Americans, American Indians/Alaska Natives, and Hispanic/Latinx, who have historically comprised a minority of the U.S. population. This is even more pronounced in the Inland Empire and Upper Central Valley Clusters, with 69 and 58 percent traditionally underrepresented minorities. The Central Valley and Inland Empire Clusters also have at least 50 percent enrollment from underrepresented groups. The Bay Area, Central Coast, Chico, and North California Clusters have relatively lower proportions of underrepresented minorities, compared to the state average. At the CSU campus level, Dominguez Hills, Los Angeles, San Bernardino, and Bakersfield serve the highest number of traditionally underrepresented minorities (between 63 and 75 percent).

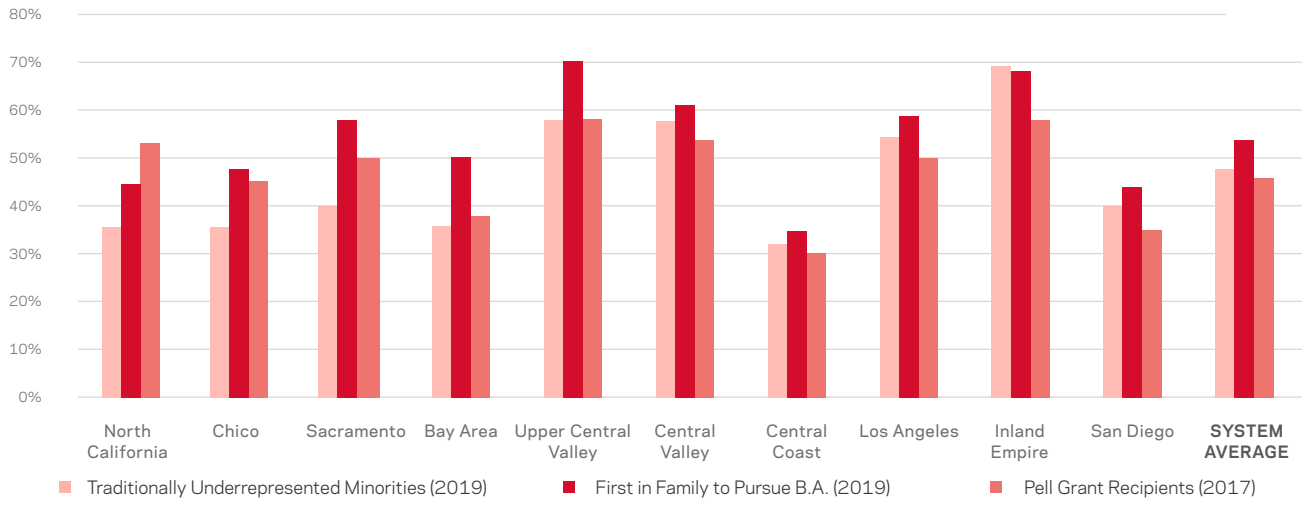
Systemwide, over half of CSU students are the first in their family to pursue a bachelor's degree. The trends for this characteristic among Clusters are similar to trends for traditionally underrepresented minorities, with the highest shares of first-generation students in the Upper Central Valley (70 percent) and Inland Empire (69 percent) Clusters, and shares of first-generation students above the systemwide average (54 percent) in the Central Valley (62 percent), Los Angeles (59 percent), and Sacramento (58 percent) Clusters (see Figure 3.14). The Bay Area, Chico, North California, and San Diego Clusters each enroll fewer than 50 percent of first-generation students, and the Central Coast is a low outlier, with 35 percent of students the first in their family to pursue a bachelor's degree.

Among Pell Grant recipients, who are generally lower income, there is more uniformity among Clusters and throughout the CSU system as a whole (see Figure 3.14). Six of 10 Clusters serve 50 percent or more Pell Grant recipients, although the systemwide average is modestly lower (45 percent). The Inland Empire and Upper Central Valley Clusters have notably higher shares of Pell Grant recipients, where the share of traditionally underrepresented minorities and first-generation students is also high. The Central Coast is a notably low outlier with only 30 percent Pell Grant recipients.

These key characteristics are among many that the CSU considers in terms of achieving its priorities to close the equity gap. The three Clusters where enrollment demand is expected to exceed Planned Capacity by 2035—Chico, Los Angeles, and Sacramento (see Section 3.3.2 for more detail)—vary dramatically in terms of current CSU student sociodemographics (see Figure 3.14). The Los Angeles Cluster is well above the systemwide average in terms of diversity, share of first-generation students, and share of students with Pell Grants, the three metrics discussed above, whereas the Chico Cluster is below the systemwide average in all three. The Sacramento Cluster serves a smaller proportion of traditionally underrepresented minorities, but compared to the systemwide average, has a higher proportion of students first in their family to pursue a bachelor's degree and Pell Grant recipients. Traditionally underrepresented minorities, first in family to pursue a bachelor's degree, and Pell Grant recipient data are shown by campus in Figure 3.15.

Los Angeles and Bay Area Cluster campuses serve the largest populations within a 45-minute drive time (see Figure 3.16). Los Angeles campuses each serve more then 2.0 million people under age 25, with median household incomes ranging between $61,100 and $75,600, around the state median of $71,200 (excluding Northridge, which serves only 1.3 million people under age 25 and has a median household income of $77,000).[1] Los Angeles Cluster campuses also serve populations with historically lower educational attainment (between 35 and 39 percent of the population with higher education degrees, excluding the Northridge campus, which has 50 percent educational attainment) compared to other CSU campuses across the state and the state average (40

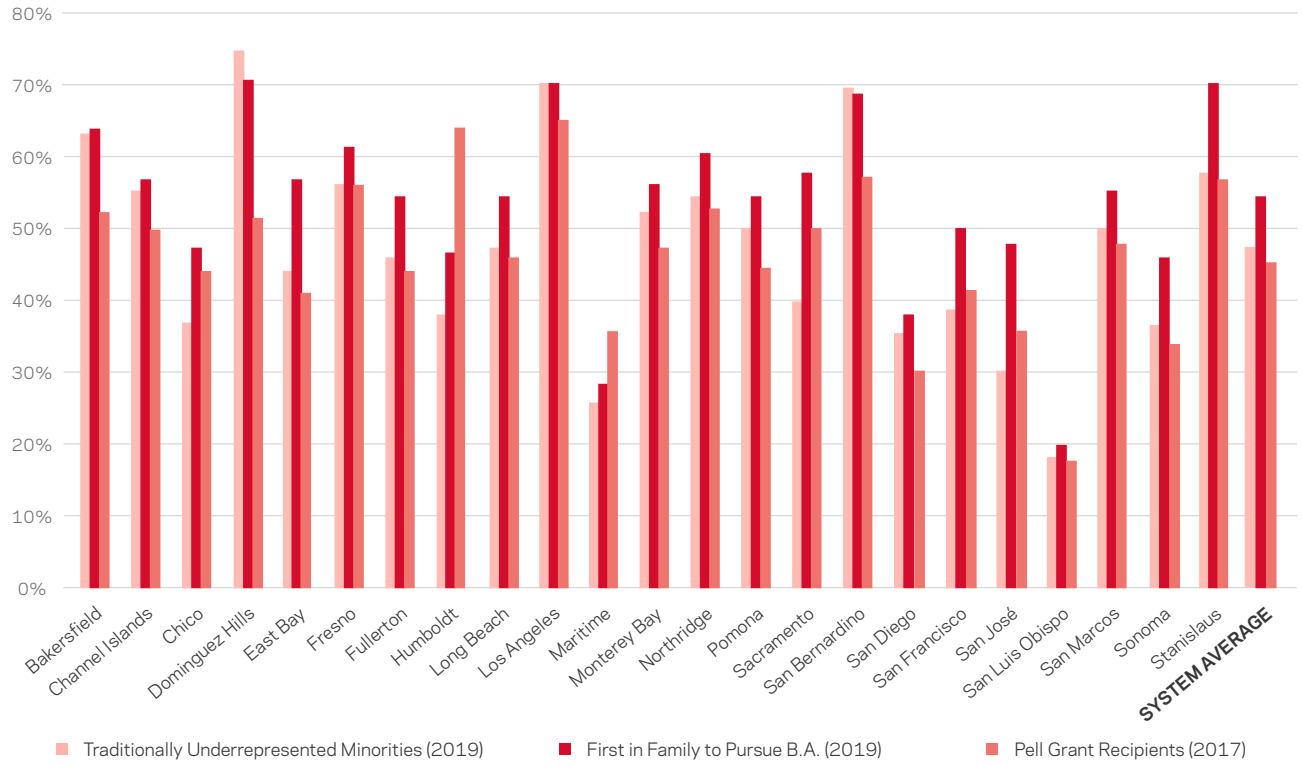
Figure 3.14 Traditionally Underrepresented Minorities, First-Generation Students, and Pell Grant Recipients by Cluster



Source: The CSU Institutional Research and Analyses' Enrollment Dashboard. (2020). Student enrollment characteristics.

1. Esri ArcGIS Business Analyst (Version 8.1). (2019). *American Community Survey 5-Year Estimates.* 45-minute drive towards the site on a typical Monday at 8:30 a.m.

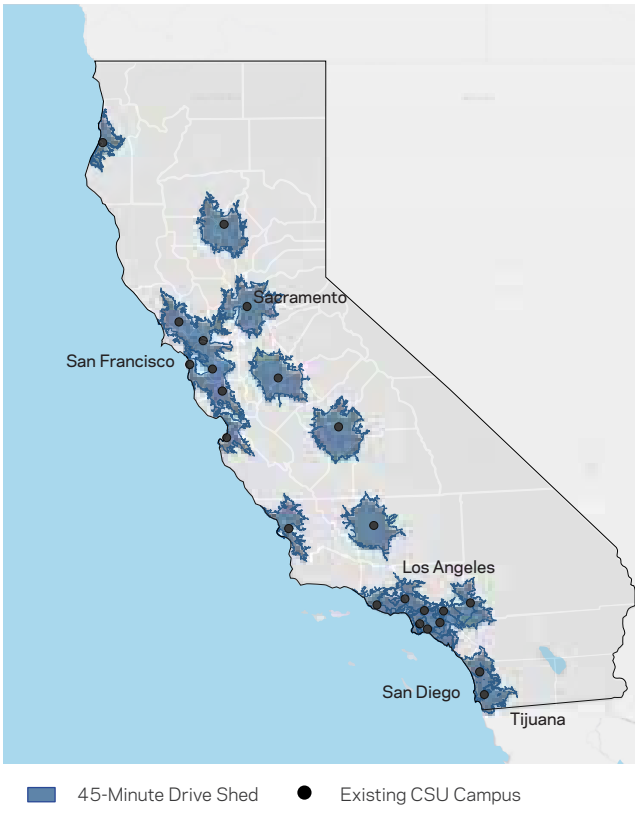
Figure 3.15 Traditionally Underrepresented Minorities, First-Generation Students, and Pell Grant Recipients by Campus



Source: The CSU Institutional Research and Analyses' Enrollment Dashboard. (2020). Student enrollment characteristics.

percent).[2] Most Bay Area Cluster campuses (East Bay, Maritime, San Francisco, San José), as well as the Sacramento and San Bernardino campuses, also serve large populations under age 25 within a 45-minute drive (between 500,000 and 1.1 million people). Bay Area Cluster campuses generally serve populations within a 45-minute drive with higher median incomes (between $83,000 and $122,000) and educational attainment (between 51 and 62 percent of the population with higher education degrees, compared to the state average of 40 percent).

Figure 3.16 Systemwide 45-Minute Drive Shed Map



Source: Esri ArcGIS Business Analyst (Version 8.1). (2019). 45-minute drive toward the site on a typical Monday at 8:30am.

2. Esri ArcGIS Business Analyst (Version 8.1). (2019). American Community Survey 5-Year Estimates. 45-minute drive towards the site on a typical Monday at 8:30 a.m.

3.3 Projected Enrollment Demand

3.3.1 ENROLLMENT DEMAND CONTEXT

CSU enrollment is largely driven by high school graduation trends across the state and transfers from California Community Colleges (CCC). High school graduates enter the CSU as First-Time Freshmen (FTF), whereas CCC students transfer as upper-division students. As a whole, the population of high school graduates is shrinking across the state as population declines, as shown in Table 3.2. It is important to note that this Report's projections extend only to 2035 and therefore do not account for more substantial population decreases expected to continue through 2060 across the state. This is due in part because this Report's analysis focuses on high school graduates and there is a lag in change in high school graduation rates compared to overall population declines, as it takes roughly 14 years for a pre-school-aged child to matriculate through the high school system. The other major driver of enrollment at the CSU is CCC enrollment, which has also declined since its peak in 2010. CCC enrollment tends to vary inversely with business/economic cycles, whereby during a strong business cycle, more prospective CCC students choose full-time employment over CCC enrollment. Conversely, during a period of economic downturn, including the Great Recession of 2007–2009, a higher proportion of students enroll full time in public two-year institutions.[1]

3.3.2 PROJECTED ENROLLMENT DEMAND

ENROLLMENT DEMAND METHODOLOGY

Enrollment has continued to grow across the system beyond the level funded by the state, which is why some campuses have become "impacted" (i.e., campuses have adjusted admissions criteria as a whole or for specific majors to account for the fact that all campuses in the CSU system have more applicants than their capacity to serve students). Between 2004 and 2018, full-time undergraduate enrollment grew by 107,000 students, or approximately 2 percent on average annually.[2] During this period, the greatest increase in enrollment demand was in the Los Angeles Cluster (albeit at a slower rate of growth than statewide due to its existing base of students), followed distantly by the Bay Area, San Diego, and Central Coast Clusters. The Great Recession of 2007–2009 initially slowed annual enrollment growth due to reduced funding, but enrollment subsequently increased substantially, at an annualized rate of 4 percent between 2010 and 2013. Annual growth slowed modestly to roughly 2 percent between 2013 and 2018, resulting in approximately 39,000 additional full-time undergraduate students across the system.

The geographical basis for this Report is the 10 geographic Clusters previously described. Whenever this Report uses third-party forecasts or historical data that are more granular than the Clusters (e.g., high school graduation rates and community college enrollment), the data are aggregated to the Cluster level to facilitate the analysis. This Report defines new enrollment at the CSU as consisting of resident and non-resident First-Time Freshmen (FTF) as well as undergraduate transfers from other institutions. For each of the 10 Clusters, this Report uses "enrollment coefficients" for the student populations of interest. These coefficients represent the historical ratio of enrollment at a CSU campus compared to the total pool of available students within the geographic Cluster. This Report uses the California Department of Finance (DOF) forecasts of high school graduates through 2029 from the DOF 2019 high school graduate projection series. This Report furthermore bases projections of new transfer undergraduate enrollment on historical enrollment trends among community college students taking 12 or more credits in a semester. Historical data on community college enrollment are from the California Community Colleges Chancellor's Office Management Information Systems "Data Mart."[3] This Report specifically uses data for students enrolling in 12 or more units in the fall term, as they are largely representative of the students most likely to transfer to a CSU.

Table 3.2 High School Graduates by Cluster (2012–2035)

Cluster		Actual 2012	Actual 2017	Projected 2020	Projected 2035
1	North California	6,200	5,900	5,700	5,500
2	Chico	7,600	7,600	7,700	8,200
3	Sacramento	25,500	26,100	26,300	27,500
4	Bay Area	67,900	70,900	73,700	66,000
5	Upper Central Valley	21,200	23,700	23,800	23,900
6	Central Valley	32,000	35,300	36,500	36,200
7	Central Coast	21,700	22,300	22,600	19,200
8	Los Angeles	142,800	141,500	137,300	108,800
9	Inland Empire	57,100	58,400	57,200	53,300
10	San Diego	36,500	37,800	38,100	35,600
TOTAL		418,500	429,500	428,900	384,200

Sources: California Department of Finance (2012–2028); HR&A Advisors, Inc. (2029–2035).

1. A. Dundar, D. Hossler, D. Shapiro, J. Chen, S. Martin, V. Torres, D. Zerquera, and M. Ziskin. (July 2011). *National Postsecondary Enrollment Trends: Before, During, and After the Great Recession (Signature Report No. 1).* National Student Clearinghouse Research Center.
2. Office of the Chancellor, The California State University. *(2019). Fall 2018 Enrollment Demographics.* https://www2.calstate.edu/csu-system/about-the-csu/facts-about-the-csu/enrollment
3. Sources: California Community Colleges Chancellor's Office Data Mart (2019); HR&A Advisors, Inc. (2020).

To forecast total campus enrollment each year, this Report estimates continuation for all students according to their year of study, classification (FTF/Transfer), and campus. To construct a "cohort survival" model reflective of students' tenure at a CSU, this Report uses the most recent continuation data reported by the CSU Graduation and Success Dashboard.[4] Dashboard data provide different continuation rates for FTF and transfer students, allowing this Report to evaluate populations differently. By using continuation rates, this Report accounts for students who either graduated or left individual CSUs without graduating. A schematic representation of this Report's CSU enrollment projection model is shown in Figure 3.17.

Given that the enrollment projections are based on historical enrollment figures, including enrollment at impacted campuses, these initial forecasts represent a "constrained" 2019–2020 baseline (i.e., eligible candidates denied admission had no opportunity to enroll). However, the baseline forecasts for new enrollment are not constrained, as this Report assumes that enrollment coefficients would remain static, regardless of trends in high school graduate populations and responding investments in campus capacity and state budget allocations, which have historically caused enrollment coefficients to decline.

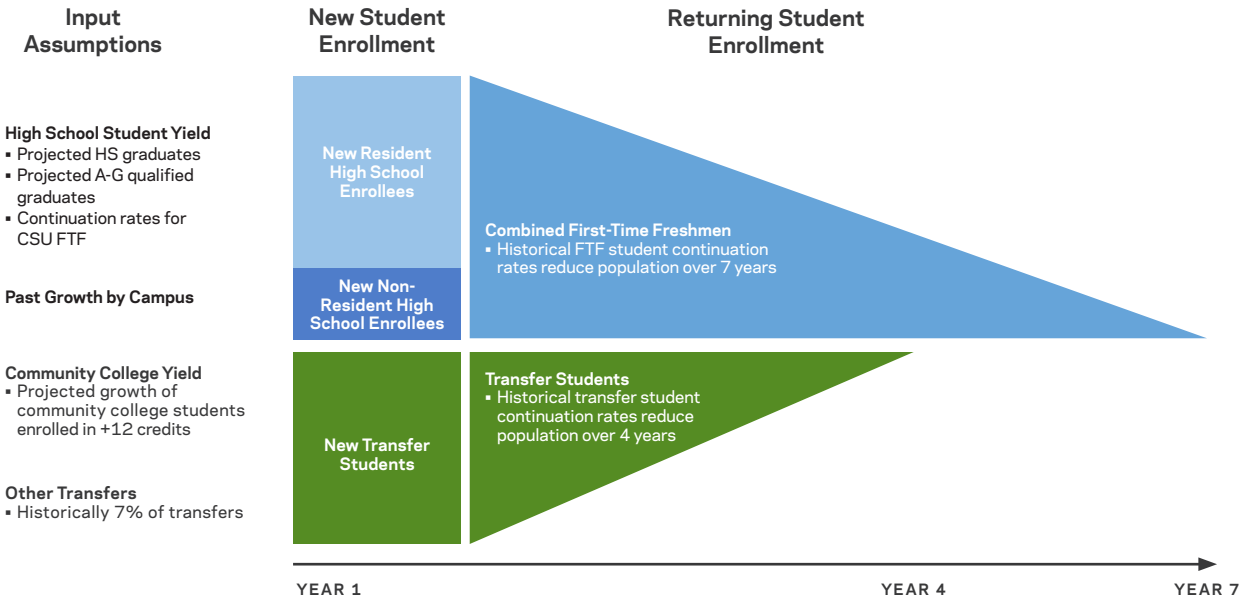
To estimate the impact of an increasing share of California high school graduates completing the coursework necessary to apply to the CSU, this Report utilizes data from the California Department of Education on graduates meeting the UC/CSU requirements, which are commonly known as "A-G" requirements.[5] To account for this trend, the Report assumes that the share of A-G-qualified students would continue to increase at the same rate as in the last 10 years, with a ceiling based on the current performance achieved in the highest-performing counties in the state. This share of A-G completion is then applied to the total base of high school graduates through 2035 to reach a gross estimate of total A-G-completing high school graduates across every county, with results subsequently aggregated into their respective Clusters for analysis. More detail about the projection methodology and projection results for two other plausible but less likely enrollment demand scenarios is included in Appendix A.

PROJECTED ENROLLMENT DEMAND

This Report utilizes historical A-G completion growth rates during the past 10 years to project enrollment demand, assuming the pool of CSU-eligible high school students continues to increase at the average historical rate. No adjustments to community college transfers are made in this scenario beyond projecting historical trends forward. The results of this scenario are shown in Table 3.3.

The Cluster with the least growth is projected to be the Los Angeles Cluster, losing approximately 3,400 potential students between 2019 and 2035, while the Cluster with the most growth is the Central Valley Cluster, gaining approximately 10,400 potential students between 2019 and 2035. Overall, the CSU system is expected to see an increase in enrollment demand of approximately 44,000 students, in contrast to anticipated stagnant growth and modest decline in the statewide population. This scenario represents the most realistic and likely scenario by forecasting increased A-G completion and growing the overall pool of CSU-eligible high school students, reflecting past trends that are anticipated to continue for the foreseeable future. This scenario does not fully account for potential unmet demand that is masked by funding constraints and impaction across the CSU system. The growth estimated by this Report, if accommodated by the

Figure 3.17 Enrollment Model Schematic



4. A cohort survival model forecasts the completion rate at each year of study until graduation from the CSU.
5. A-G requirements are not the only qualification requirement to demonstrate preparation for enrollment at a CSU.

Table 3.3 Main Campus Enrollment Growth Projections by Cluster (Undergraduate and Graduate/Post-Baccalaureate FTES)

Cluster		Actual 2019	Projected 2020	Projected 2020	Projected 2020	Projected 2020	# Change 2019-2035	% Change 2019-2035
1	North California	6,500	6,800	8,300	8,700	8,800	2,300	35.4%
2	Chico	14,800	15,000	17,200	18,800	20,100	5,300	35.8%
3	Sacramento	25,100	25,300	27,700	29,100	30,200	5,100	20.3%
4	Bay Area	74,300	75,800	81,200	79,400	79,000	4,700	6.3%
5	Upper Central Valley	8,400	8,700	10,200	10,300	10,500	2,100	25.0%
6	Central Valley	29,500	30,900	37,400	39,700	39,900	10,400	35.3%
7	Central Coast	33,600	34,400	40,700	39,900	39,700	6,100	18.2%
8	Los Angeles	159,800	161,800	169,100	162,300	156,400	(3,400)	-2.1%
9	Inland Empire	18,100	19,000	22,600	22,900	23,600	5,500	30.4%
10	San Diego	45,200	46,300	51,100	51,500	50,900	5,700	12.6%
TOTAL		415,300	424,000	465,500	462,600	459,100	43,800	10.6%

Sources: HR&A Advisors, Inc. (2020).

CSU, would contribute to the CSU's ability to support the growth of California's economy; in the near term, if growth in degree conferral continues at historical rates, the CSU would keep pace with projected economic growth. Nevertheless, in certain industry sectors, the CSU and other California higher education institutions do not produce enough qualified graduates alone to meet occupational demand.[6]

3.3.3 SAN JOAQUIN COUNTY ENROLLMENT DEMAND

As discussed previously, the modeling approach used to project future CSU enrollment to 2035 relies primarily on a projection of the A-G course completion rate among high school graduates who become eligible FTF and a projection of CCC enrollment that generates CSU transfers. Certain initiatives now underway in the City of Stockton and San Joaquin County to improve K-12 and CCC education outcomes have the potential to change historical trends underlying the CSU enrollment projections presented in this Report for the Upper Central Valley. These and similar other initiatives across the state are still early in their implementation and not uniformly applied, and thus could not be accounted for in the 2035 projections. Nevertheless, it is important to acknowledge their potential to change the projections to some degree, including for the Upper Central Valley Cluster.

The Upper Central Valley Cluster population has the lowest share of residents with an associate's degree or higher when comparing among the Five Evaluated Locations. Approximately one in four residents in the Upper Central Valley Cluster has achieved a degree beyond a high school diploma or equivalent. Among the population that pursues an associate's degree or higher, white residents are overrepresented. While comprising only 31 percent of the total population in the Cluster, white residents comprise 37.3 percent of residents with an associate's degree or higher. San Joaquin County in the Upper Central Valley Cluster has taken steps toward increasing the educational attainment in the region and has been generally trending upward when looking at historical A-G course completion and CCC enrollment. There are few affordable higher education options in the region, and as such, a public institution of higher education may also support the re-engagement of adult learners outside of these high school and CCC pipelines. In 2016, the year for which A-G completion data are most recently available, San Joaquin County's total share of high school graduates who completed A-G coursework was 33 percent, as compared to 47 percent for graduates across California as a whole. However, San Joaquin County's A-G completion rate could increase in the future due to a recent initiative within the Stockton Unified School District.[7] Anecdotal evidence reported to the Consultant Team during outreach meetings in Stockton with local education leaders indicates some early successes with this initiative. If high schools across San Joaquin County were to close the gap between their current A-G completion rates and the statewide average in 2019, then the number of FTF-eligible students would increase by 40 percent, to roughly 4,500 students from 3,200, leading to a marginal increase in the 2035 enrollment projection in the Upper Central Valley Cluster.

In addition, the number and share of CCC students in San Joaquin County taking more than 12 units have increased between 2010 and 2019, at an annualized rate of 1 percent, in contrast to a decrease in CCC students taking 12 or more credits across California. If this trend continues, combined with initiatives to reduce or eliminate tuition at CCCs, it is possible that the number and share of CCC students seeking to transfer to the CSU could increase above historical trends, leading to an additional but likely modest increase above the projection in this Report to CSU enrollment in the Upper Central Valley Cluster by 2035.

This Report's analysis relies heavily upon historical trends of A-G completion and CCC enrollment to forecast enrollment demand at

6. The enrollment demand estimates demonstrated herein are drawn per data available as of January 2020.
7. Stockton Unified School District. Rigorous Graduation Requirements Implementation Timeline. Retrieved May 22, 2020, from https://www.stocktonusd.net/Page/10169

the Cluster level. Initiatives to increase accessibility and enrollment at CCCs, along with San Joaquin County's A-G completion initiatives, will impact the number of A-G-completing high school students looking to enroll at a CSU as FTF as well as the number of CCC students looking to transfer to a CSU. These initiatives would increase enrollment demand in the Upper Central Valley Cluster beyond what can be effectively estimated by this Report's analysis of historical trends, although it is difficult to predict the impact of these initiatives on enrollment.

3.3.4 PRIOR LEGISLATIVE ANALYST'S OFFICE AND COLLEGE FUTURES ANALYSES

The State of California's nonpartisan Legislative Analyst's Office (LAO) conducted a projection in 2017 of enrollment demand across the entire system of higher education in California. The College Futures Foundation ("College Futures") also recently assessed the enrollment demand in California for the CSU and UC systems, and separately assessed workforce needs in terms of the difference between future job postings and future graduation rates. The LAO and College Futures enrollment demand projections came to different conclusions. This Report conducted a separate analysis of enrollment demand for the CSU system, and acknowledges several differences in methodologies and key conclusions between this Report and the previous projections.

Each of these reports utilized different forecasting timelines when projecting enrollment demand—the LAO through 2025, and College Futures through 2030; this Report forecasts enrollment demand through 2035. The basis for this Report's approach to quantifying enrollment demand for the CSU system in California involves establishing 10 Clusters, as compared to the LAO report's approach, which employed a similar Clusters approach with 11 subregions. College Futures did not explicitly delineate their analysis by subregions, but rather described the impacts of enrollment demand within "acute impact regions," including the Central Valley, Inland Empire, and Los Angeles.

This Report considers the complete range of students eligible to enroll in the CSU. These include CSU-eligible high school graduates, community college transfer students, non-community college transfer students, and non-resident transfer students. The LAO projections were based only on California high school graduates and assumed that enrollment at the CSU would increase proportionately to total California high school graduates, with no consideration of recent improvements in students' ability to satisfy A-G course requirements. The LAO did not separately forecast transfer enrollment, but rather assumed that it would grow proportionately to total enrollment. College Futures forecasted growth in A-G-eligible high school graduates and community college students, assuming that A-G-eligible high school graduates would grow at a rate of roughly 10 percent per year until 2030, as compared to this Report, which projects a near-term annualized A-G completion growth rate of 1.4 percent.

This Report projects modest enrollment demand growth across the CSU system between 2019 and 2035 of approximately 44,000 potential FTES, with a compound annual growth rate of 0.6 percent across the projection period. The LAO report projected similar rates of modest statewide enrollment growth, with a compound annual growth rate of 0.5 percent through 2025. In contrast, College Futures projected enrollment demand for the CSU and UC systems to increase substantially across the State of California, in aggregate by 144,000 FTES by 2030.[8]

8. College Futures did not present disaggregated projections for the CSU independent of the UC system.

3.4 Current Enrollment and Capacity Assessment

3.4.1 PHYSICAL CAPACITY DEFINITIONS

The CSU tracks the inventory of spaces across its campuses and associated Off-Campus Centers via the systemwide Space and Facilities Database (SFDB), which is updated annually. Although all space types are defined and quantified, classrooms and teaching labs receive special attention, as they directly support campus instruction. This Report evaluates Physical Capacity, as defined and discussed below.

Current Capacity: Current Capacity is the existing Physical Capacity of a given campus measured in terms of Full-Time Equivalent Students (FTES). Physical Capacity is based on two metrics: 1) the actual number of seats (or stations) in a given classroom or teaching lab; and 2) a legislated standard that combines target scheduled hours per week for each space type and target seat occupancy rates by space type to define a target utilization. When combined, the two metrics quantify the potential capacity of a given classroom or teaching lab, expressed in FTES. Capacity by individual space is summed to define the overall capacity of a given campus in total FTES.

This Report uses data from Fall 2018 as the representative year because during the timeframe of the study, it represented the most current data available across all areas of the analysis. Current Capacity represents existing Physical Capacity as of Fall 2018. An additional 7,969 FTES of capacity space is funded and in the process of being constructed, adding a modest 2 percent overall capacity, as detailed further in Appendix A.5.

Planned Capacity: Planned Capacity is the potential on-campus Physical Capacity of a given campus approved by the Board of Trustees, also measured in FTES. Adjustments to Planned Capacity can be revised during the Campus Master Plan update process.

A Campus Master Plan is a document that illustrates existing and anticipated facilities necessary to accommodate a specified enrollment level at an estimated target date or planning horizon. It is the physical representation of how a campus will implement its Academic and Strategic Plans. Revisions to the Master Plan take place periodically, not less than every 10 years. Although a planning horizon is identified in a Campus Master Plan and subsequent revisions, implementation of all projects specified within the plan is subject to enrollment and capital funding availability, which is revisited annually as part of the budgeting process.

3.4.2 ENROLLMENT AND CAPACITY

Table 3.4 shows systemwide Current Enrollment and Current Capacity data for the CSU's 23 main campuses and eight Off-Campus Centers included by Cluster. The Off-Campus Centers are:

- Bay Area: Cal State East Bay Concord Campus and San Francisco State Downtown Campus
- Upper Central Valley: Stanislaus State Stockton Campus
- Central Valley: CSU Bakersfield Antelope Valley Campus
- Los Angeles: Cal State Fullerton Irvine Center
- Inland Empire: Cal State San Bernardino Palm Desert Campus
- San Diego: San Diego State Imperial Valley Brawley Campus and Calexico Campus

The Los Angeles, Bay Area, and San Diego Clusters account for 66 percent of systemwide Current Capacity and Current Enrollment. As expected, capacity and enrollment are largely centralized within the main campuses, which account for 97 percent of systemwide Current Capacity and 99 percent of Current Enrollment. The main campuses also account for 99 percent of systemwide face-to-face instruction, following the same distribution pattern across the three larger Clusters (see Table 3.4).

Given that Off-Campus Centers represent a small percentage of systemwide enrollment and capacity figures and enrollment fluctuates from year to year, the following assessment—with the exception of Table 3.4—focuses on main campus figures only (see Appendix A.5 for a detailed breakdown).

Table 3.4 Systemwide Current Enrollment and Capacity for Main Campuses and Off-Campus Centers as of Fall 2018

Cluster	Total Current Enrollment (FTES)	Current Face-to-Face Enrollment (FTES)	Total Current Capacity (FTES)
1. North California	7,357	6,943	7,204
2. Chico	16,437	15,588	14,732
3. Sacramento	26,717	25,553	21,311
4. Bay Area	74,492	70,995	62,318
5. Upper Central Valley	8,759	8,335	8,043
6. Central Valley	31,438	29,857	24,803
7. Central Coast	34,140	33,093	27,331
8. Los Angeles	155,849	150,014	128,027
9. Inland Empire	17,748	17,049	15,891
10. San Diego	44,260	42,558	33,959
Total	**417,198**	**399,985**	**343,619**

Sources: The California State University Office of the Chancellor. (2018). Course Section Report; System Level Space Database File.

Current face-to-face instruction exceeds Current Capacity in all Clusters except North California. Across the system, the CSU instructed roughly 17 percent more students in a face-to-face modality than the implied Current Capacity of its campuses in 2018, or 57,296 FTES (see Table 3.5). The largest differences between Current Enrollment and Current Capacity are in the larger Clusters: Los Angeles (20,769 FTES), Bay Area (9,196 FTES), and San Diego (8,780 FTES). In percentage terms, the San Diego Cluster enrolled 27 percent more students than its implied campus Current Capacity, followed by the Central Coast (21 percent), Sacramento (20 percent), and Central Valley (18 percent) Clusters.

Current face-to-face instruction is 83 percent of the combined Planned Capacity for all CSU campuses (see Table 3.6). It is important to note that the Planned Capacity only represents a potential capacity number to be reached sometime in the future once a given campus has completed all additional construction projects represented in the Master Plan Map. The Sacramento Cluster is already exceeding its Planned Capacity with face-to-face instruction levels today. The Chico Cluster is at the capacity threshold, with current face-to-face instruction representing 99 percent of Planned Capacity. The Los Angeles Cluster, which has the largest enrollment in the CSU system, follows closely at 95 percent, while all other Clusters show a wider gap, with current face-to-face instruction levels ranging from 58 to 88 percent of their Planned Capacity.

Three campuses are currently preparing revisions to their existing Master Plans—Chico, Fullerton, and Monterey Bay. As part of these Master Plan revisions, each of the three campuses is exploring increased Planned Capacity to accommodate additional growth. With the proposed increase, the Chico Cluster would add 2,800 FTES to its Planned Capacity. The relationship between Current Capacity and Planned Capacity shows a similar pattern across Clusters (see Table 3.7). The Chico, Sacramento, and Los Angeles Clusters are the closest to achieving their Planned Capacity, with Current Capacity ranging between 82 and 93 percent of Planned Capacity. The Bay Area Cluster follows closely at 76 percent, while the rest of the Clusters range between 55 and 60 percent. The

Table 3.5 Current Face-to-Face Instruction to Current Capacity as of Fall 2018 (Main Campus Only)

Cluster	Current Capacity (FTES)	Current Face-to-Face Instruction (FTES)	Available Capacity (FTES)
1. North California	7,204	6,943	261
2. Chico	14,732	15,588	- 856
3. Sacramento	21,311	25,553	- 4,242
4. Bay Area	61,313	70,509	- 9,196
5. Upper Central Valley	6,974	8,116	- 1,142
6. Central Valley	24,803	29,370	- 4,567
7. Central Coast	27,331	33,093	- 5,762
8. Los Angeles	128,027	148,796	- 20,769
9. Inland Empire	13,987	16,229	- 2,242
10. San Diego	33,064	41,844	- 8,780
Total	**338,746**	**396,042**	**- 57,296**

Sources: The California State University Office of the Chancellor. (2018). Target Year Comparison of Physical Capacity vs. Annual Full-Time Equivalent Students; Course Section Report, Main Campus Only.

Table 3.6 Current Face-to-Face Instruction to Planned Capacity as of Fall 2018 (Main Campus only)

Cluster	Planned Capacity (FTES)	Current Face-To-Face Instruction (FTES)	Available Capacity (FTES)
1. North California	12,000	6,943	5,057
2. Chico	15,800	15,588	212
3. Sacramento	25,000	25,553	-553
4. Bay Area	80,200	70,509	9,691
5. Upper Central Valley	12,000	8,116	3,884
6. Central Valley	43,000	29,370	13,630
7. Central Coast	49,500	33,093	16,407
8. Los Angeles	156,000	148,796	7,204
9. Inland Empire	25,000	16,229	8,771
10. San Diego	60,000	41,844	18,156
Total	**478,500**	**396,042**	**82,458**

Source: The California State University Office of the Chancellor. (2018). Course Section Report, Main Campus Only.

Table 3.7 Current Capacity to Planned Capacity as of Fall 2018 (Main Campus only)

Cluster	Planned Capacity (FTES)	Current Capacity (FTES)	Capacity Growth Remaining (FTES)
1. North California	12,000	7,204	4,796
2. Chico	15,800	14,732	1,068
3. Sacramento	25,000	21,311	3,689
4. Bay Area	80,200	61,313	18,887
5. Upper Central Valley	12,000	6,974	5,026
6. Central Valley	43,000	24,803	18,197
7. Central Coast	49,500	27,331	22,169
8. Los Angeles	156,000	128,027	27,973
9. Inland Empire	25,000	13,987	11,013
10. San Diego	60,000	33,064	26,936
Total	**478,500**	**338,746**	**139,754**

Source: The California State University Office of the Chancellor. (2018). *Target Year Comparison of Physical Capacity vs. Annual Full-Time Equivalent Students (Fall 2018).*

total Current Capacity is equal to 71 percent of the overall Planned Capacity.

3.4.3 SAN JOAQUIN COUNTY CAPACITY (UNIVERSITY PARK)

The Stanislaus State Stockton Off-Campus Center is located at the Stockton University Park site, one of the seven identified sites within the Five Evaluated Locations. The Off-Campus Center has a current face-to-face enrollment of 219 FTES[1] and a Current Capacity of 1,069 FTES, allowing the campus enrollment to grow without further capital investment.[2] There is a myriad of existing structures on site that could potentially be repurposed in support of future campus growth, but significant investment would be required to improve them to better support contemporary educational needs.

3.4.4 CURRENT FACILITY UTILIZATION

Utilization standards for classrooms and teaching labs in California's public higher education are set by the State Legislature. Although institutional focus and use of space have evolved significantly since the 1960s when they were created, the standards have not been revisited to the same degree. While the standards are generally considered to be achievable, they are some of the highest in the country (see Appendix A.5).

Table 3.8 shows a systemwide overview of classroom and teaching lab utilization as of Fall 2018. Classroom utilization figures show that most campuses are below 100 percent space utilization, with a systemwide average of 89 percent. The exceptions are San Luis Obispo and San Marcos, which exceed 100 percent utilization in these space types. Teaching lab utilization figures show that 12 of the 23 campuses are exceeding the utilization standard set for teaching lab stations. San Marcos shows the highest utilization of teaching lab stations at 150 percent, while East Bay shows the

Table 3.8 CSU Classroom and Lab Utilization by Campus, Fall 2018, Against the 100% Target Utilization

Campus	Classroom Utilization	Teaching Lab Utilization
Bakersfield	79.6%	98.1%
Channel Islands	83.9%	119.8%
Chico	73.0%	88.0%
Dominguez Hills	94.4%	94.2%
East Bay	74.3%	72.4%
Fresno	96.2%	92.1%
Fullerton	92.3%	139.2%
Humboldt	74.3%	91.9%
Long Beach	81.5%	121.2%
Los Angeles	99.8%	88.0%
Maritime Academy	99.3%	88.0%
Monterey Bay	86.4%	105.7%
Northridge	79.6%	121.0%
Pomona	88.4%	122.6%
Sacramento	94.3%	117.8%
San Bernardino	96.2%	112.4%
San Diego	83.5%	96.3%
San Francisco	78.6%	87.7%
San José	84.4%	133.8%
San Luis Obispo	107.3%	113.6%
San Marcos	116.5%	150.1%
Sonoma	90.1%	109.5%
Stanislaus	93.7%	96.3%
STATEWIDE	**89.0%**	**106.9%**

Source: The California State University Office of the Chancellor. (2018). *Campus Utilization Report.*

1. The California State University Office of the Chancellor. (2018). *Course Section Report.*
2. The California State University Office of the Chancellor. (2018). *System Level Space and Facilities Database File.*

lowest at 72 percent, with a systemwide average for teaching lab utilization at 107 percent.

3.4.5 CAPACITY VS. NON-CAPACITY SPACES

Classroom teaching lab utilization does not represent the full picture of course delivery on a campus. By comparing total Current Enrollment to total Current Capacity on a campus level, a different picture emerges. Campuses are using a myriad of strategies, including alternative modes of delivery and teaching throughout the campus (including teaching in non-capacity spaces) to provide instruction beyond what their Current Capacity might imply. In fact, systemwide, campuses have enrolled 17 percent more students than they have capacity space for.

Capacity spaces refer strictly to classrooms and teaching labs. Non-capacity spaces refer to other space types that are in service to campus needs (offices, conference rooms, shop space, etc.) but that historically have not primarily been used for instruction. Figure 3.18 breaks down Main Campus Current Enrollment by type of instructional space. Enrollment is also compared against Current Capacity.

The total 396,042 FTES shown corresponding to face-to-face instruction account for 96 percent of systemwide enrollment for Fall 2018 on main campuses.[3] Roughly 80 percent of face-to-face instruction occurs within capacity spaces, namely classrooms and teaching labs. The remaining 20 percent of face-to-face instruction occurs in non-capacity spaces that vary in description and comprise a wide variety of settings such as computer labs, studios, faculty offices, administrative space, physical education facilities, conference rooms, lounges, libraries, and research or residential spaces. While some nontraditional teaching environments may suit a given course, others such as office, residential, or temporary settings could be considered less than ideal for instruction.

3.4.6 SUMMER ENROLLMENT

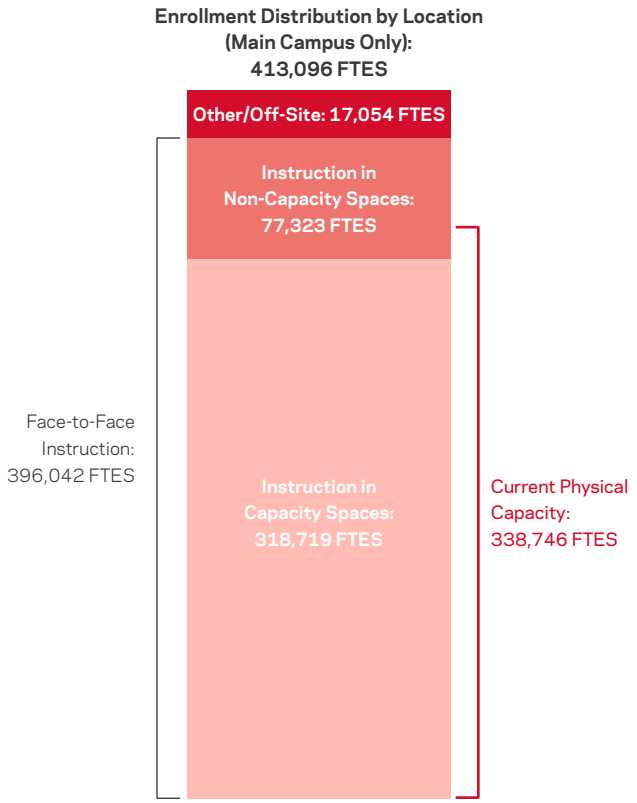
As outlined in the California State University Summer Enrollment report, Graduation Initiative 2025 is the CSU's initiative to increase graduation rates for all CSU students and eliminate achievement and opportunity gaps. As part of the initiative, individual campuses are incentivizing summer term enrollment to help students shorten the time needed to obtain their degree.[4]

Enrolling in summer session provides students with opportunities to accelerate their graduation date by allowing them to increase the number of units they complete each year. Instruction during the summer term is offered through both state-funded courses and self-support courses. Each year the Chancellor's Office applies legislated goals in their planning process; on recent years, state support has increased and summer financial aid programs have expanded. Since 2017, the U.S. Department of Education has offered year-round Pell Grants that allow eligible students to receive financial aid for the summer term. Additionally, the 2019–2020 State Budget provided the CSU with $6,000,000 for two years to provide additional financial support for the summer term. The funding is designated to provide financial aid to eligible undergraduate students to supplement and/or expand existing summer financial assistance for state-supported enrollment in Summer 2020 and Summer 2021.

Despite these improvements, Table 3.9 shows that only 24 percent of Summer 2019 student enrollment received state funding (8,839 FTES). Seventy-six percent of Summer 2019 student enrollment was in self-supported courses (28,390 FTES). Given that summer term financial aid is limited, these recent figures indicate that summer enrollment remains largely unattainable for low- to middle-income students who do not have discretionary funds to pay for self-supported courses.

By comparing summer enrollment to Current Capacity, Table 3.9 also shows that capacity is underutilized in the summer term. Seventy-two percent of statewide Summer 2019 student enrollment is concentrated within the Los Angeles, Bay Area, and San Diego Clusters (26,861 FTES). However, this enrollment figure represents only about 12 percent of their combined Current Capacity. Summer enrollment in the Inland Empire Cluster shows the highest utilization of its campuses' instructional capacity at 20 percent, followed by San Diego at 15 percent, Bay Area at 13 percent, Upper Central Valley at 12 percent, and Los Angeles at 11 percent. Summer enrollment for the remaining Clusters falls below 10 percent of their Current Capacity. Systemwide 2019 summer enrollment (37,229 FTES) represents 11 percent of total Current Capacity across the CSU.

Figure 3.18 Fall 2018 Enrollment Distribution by Space Type (Main Campus only)



3. The California State University Office of the Chancellor. (2020). *Course Section Report*.
4. The California State University Office of the Chancellor. (2020). *CSU Legislative Reports: California State University Summer Enrollment*.

Table 3.9 2019 Summer Enrollment vs. Current Capacity

Cluster	Current Capacity (FTES)	State-Funded 2019 Summer FTES	Self-Support 2019 Summer FTES	Combined 2019 Summer FTES
1. North California	7,204	16	299	315
2. Chico	14,732	65	688	753
3. Sacramento	21,311	76	1,940	2,016
4. Bay Area	61,313	3,461	4,296	7,757
5. Upper Central Valley	6,974	12	844	856
6. Central Valley	24,803	342	1,290	1,632
7. Central Coast	27,331	61	1,988	2,049
8. Los Angeles	128,027	1,399	12,665	14,064
9. Inland Empire	13,987	35	2,712	2,748
10. San Diego	33,064	3,372	1,669	5,041
Statewide	**338,746**	**8,839**	**28,390**	**37,229**

Source: The California State University Office of the Chancellor. (2020). CSU Legislative Reports: California State University Summer Enrollment.

Increased summer enrollment could not only further student attainment goals but also allow the CSU to better leverage its existing facilities. However, the state will need to make a long-term funding commitment as a reliable strategy to enable a greater number of students and faculty to participate in the summer term systemwide, in particular students and faculty in impacted degree programs. For reference, it is estimated that the operational fund cost of a 15,000 FTES campus is approximately $13,750 per FTES, with $7,500 being state funded. For illustrative purposes, based on an estimate that operation funds of $12,000 per FTES are required (as described in the Traditional Campus at 7,500 FTES budget allocation estimate found in Section 6.3 of this Report), increasing summer enrollment by 1,000 FTES would require about $12 million in additional state funding.

3.5 Planned Capacity Assessment

3.5.1 PLANNED CAPACITY

LONG-RANGE ENROLLMENT DEMAND VS. PLANNED CAPACITY ANALYSIS

A systemwide overview of long-range enrollment demand shows that in 2035, projected enrollment will exceed the collective Planned Capacity in three Clusters: Chico, Sacramento, and Los Angeles. The Bay Area Cluster will be at its capacity limit, while all other Clusters show sufficient Planned Capacity to accommodate the projected enrollment demand.

All Clusters will require significant build-out of approximately 120,000 FTES beyond their respective Fall 2018 Current Capacity in order to meet the 2035 projected enrollment demand (see Figure 3.19).

Enrollment projections will exceed Planned Capacity by 27 percent in the Chico Cluster and 21 percent in the Sacramento Cluster. In the Los Angeles Cluster, projections indicate a 1 percent overage (see Figure 3.20). The Bay Area Cluster, with its enrollment projection of 79,000 FTES, will be at the threshold of surpassing its Planned Capacity, reaching 99 percent. The Inland Empire and Central Valley Clusters also come within a close margin to their Planned Capacities, at 94 and 93 percent, respectively. The projected enrollment for the remaining Clusters falls more comfortably within their Planned Capacities; these are the Central Coast, Upper Central Valley, and San Diego Clusters—ranging between 80 and 88 percent—and North California, at 73 percent (see Table 3.10).

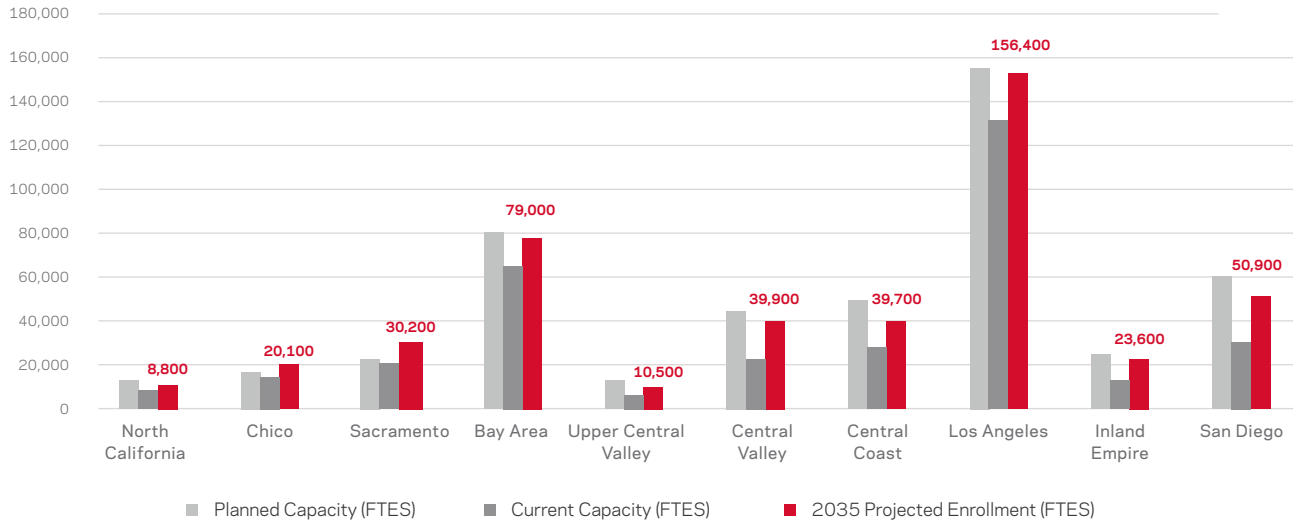
As mentioned in Section 3.4, three CSU campuses are currently preparing revisions to their existing Master Plans—Chico, Fullerton, and Monterey Bay. As part of these Master Plan revisions, each

Table 3.10 2035 Projected Enrollment to Planned Capacity by Cluster

Cluster	Planned Capacity (FTES)	Projected 2035 Enrollment (FTES)	Available Capacity (FTES)
1. North California	12,000	8,800	3,200
2. Chico	15,800	20,100	-4,300
3. Sacramento	25,000	30,200	-5,200
4. Bay Area	80,200	79,000	1,200
5. Upper Central Valley	12,000	10,500	1,500
6. Central Valley	43,000	39,900	3,100
7. Central Coast	49,500	39,700	9,800
8. Los Angeles	156,000	156,400	-400
9. Inland Empire	25,000	23,600	1,400
10. San Diego	60,000	50,900	9,100
Total	**478,500**	**459,100**	**19,400**

Sources: The California State University Office of the Chancellor. (2018). Target Year Comparison of Physical Capacity vs. Annual Full-Time Equivalent Students. HR&A Advisors, Inc. (2020).

Figure 3.19 Projected Enrollment to Current and Planned Capacity by Cluster



Sources: The California State University Office of the Chancellor. (2018). Target Year Comparison of Physical Capacity vs. Annual Full-Time Equivalent Students. HR&A Advisors, Inc. (2020).

Table 3.11 2035 Projected Enrollment to Current Capacity by Cluster

Cluster	Current Capacity (FTES)	2035 Projected Enrollment (FTES)	Unmet Need (FTES)
1. North California	7,204	8,800	-1,596
2. Chico	14,732	20,100	-5,368
3. Sacramento	21,311	30,200	-8,889
4. Bay Area	61,313	79,000	-17,687
5. Upper Central Valley	6,974	10,500	-3,526
6. Central Valley	24,803	39,900	-15,097
7. Central Coast	27,331	39,700	-12,369
8. Los Angeles	128,027	156,400	-28,373
9. Inland Empire	13,987	23,600	-9,613
10. San Diego	33,064	50,900	-17,836
Total	**338,746**	**459,100**	**-120,354**

Source: The California State University Office of the Chancellor. (2018). System Level Space Database File.

of the three campuses is exploring increased Planned Capacity to accommodate additional growth. If the new Fullerton Master Plan is approved, 2035 enrollment demand would not exceed Planned Capacity for the Los Angeles Cluster, with enrollment projections falling to 96 percent of its Planned Capacity. For Chico, the proposed enrollment projections would exceed Planned Capacity by 8 percent, rather than 27 percent.

Table 3.11 shows that, based on Fall 2018 Current Capacity, the CSU system will be required to increase its Physical Capacity by approximately 120,000 FTES in order to meet 2035 projected enrollment demand. More than three-quarters of the required growth (91,000 FTES) occurs in five Clusters: Los Angeles, San Diego, Bay Area, Central Valley, and Central Coast.

The Inland Empire, Central Valley, San Diego, and Upper Central Valley Clusters require the greatest percentage capacity increases to meet projected enrollment demand, ranging between 51 and 69 percent FTES growth from their current Physical Capacity. North California will potentially have the least pressure to increase its capacity, with 1,600 FTES projected additional capacity required.

3.5.2 CAMPUS LAND ASSESSMENT

METHODOLOGY FOR CAMPUS LAND AVAILABILITY

As the three Clusters with unmet demand, this Report further analyzes the Chico, Sacramento, and Los Angeles Clusters to evaluate whether the existing CSU campuses within these Clusters could increase their Master Plan Ceilings based on available land. Both land within the campus site boundaries and land immediately adjacent to campuses were studied, and later refinements found no need for additional land beyond the current campus properties. Campus land areas were evaluated and tabulated into the following categories:

Existing Campus Density: Campuses were categorized as either low-density or moderate-density campuses as described by the criteria below and as shown in publicly available shapefiles (from city, county, or federal sources), EIR studies, and Google Earth aerial imagery:

- **Low Density:** if the campus has been built out to a 0.29 FAR or below.
- **Moderate Density:** if the campus has been built out to a 0.30 FAR or above.

Main Campus Acreage: as pulled from the approved CSU campus Master Plan maps,[1] which identify the existing and currently planned future building footprints.

Master Plan Utilized Area: the campus land area currently in active use by the CSU, after subtracting the elements below:

- **Potentially Significant Site Conditions:** Land area that has adverse physical site conditions for development, such as those noted below, was eliminated from consideration for future CSU expansion.
  - **Easements:** with likely prohibitions against vertical construction were eliminated from further consideration.
  - **Streams:** A development buffer was established around open stream beds, eliminating them from future redevelopment. Underground streams or streams in culverts were not buffered, but were not indicated for future redevelopment.
  - **Topography:** Slopes steeper than 20 percent were eliminated from the potentially developable site land area due to higher construction costs.
  - **Agricultural Research Fields:** Land areas used as agricultural laboratories or student instructional facilities were eliminated.
  - **Large Tree Stands, Arboretums, or Orchards:** Natural areas that form an integral part of a campus's identity, academic program, or site landscape were not considered for redevelopment.

1. Master Plan maps approved as of May 2020.

Figure 3.20 Enrollment Demand vs. Planned Capacity

1. North California	73%
Planned Capacity (FTES)	12,000
Projected 2035 Enrollment (FTES)	8,800
Planned Capacity FTES Available	3,200
% Planned Capacity Utilized	**73%**

2. Chico	127%
Planned Capacity (FTES)	15,800
Projected 2035 Enrollment (FTES)	20,100
Planned Capacity FTES Available	-4,300
% Planned Capacity Utilized	**127%**

3. Sacramento	121%
Planned Capacity (FTES)	25,000
Projected 2035 Enrollment (FTES)	30,200
Planned Capacity FTES Available	-5,200
% Planned Capacity Utilized	**121%**

4. Bay Area	99%
Planned Capacity (FTES)	80,200
Projected 2035 Enrollment (FTES)	79,000
Planned Capacity FTES Available	1,200
% Planned Capacity Utilized	**99%**

5. Upper Central Valley	88%
Planned Capacity (FTES)	12,000
Projected 2035 Enrollment (FTES)	10,500
Planned Capacity FTES Available	1,500
% Planned Capacity Utilized	**88%**

6. Central Valley	93%
Planned Capacity (FTES)	43,000
Projected 2035 Enrollment (FTES)	39,900
Planned Capacity FTES Available	3,100
% Planned Capacity Utilized	**93%**

7. Central Coast	80%
Planned Capacity (FTES)	49,500
Projected 2035 Enrollment (FTES)	39,700
Planned Capacity FTES Available	9,800
% Planned Capacity Utilized	**80%**

8. Los Angeles	101%
Planned Capacity (FTES)	156,000
Projected 2035 Enrollment (FTES)	156,400
Planned Capacity FTES Available	-400
% Planned Capacity Utilized	**101%**

9. Inland Empire	94%
Planned Capacity (FTES)	25,000
Projected 2035 Enrollment (FTES)	23,600
Planned Capacity FTES Available	1,400
% Planned Capacity Utilized	**94%**

10. San Diego	85%
Planned Capacity (FTES)	60,000
Projected 2035 Enrollment (FTES)	50,900
Planned Capacity FTES Available	9,100
% Planned Capacity Utilized	**85%**

- **Fault Lines:** CSU seismic requirements follow the same criteria as the statewide Alquist-Priolo Earthquake Fault Zone Act, which sets significant fault lines as designated Holocene-active faults of <11,000 years that could potentially cause surface rupture. Other "Class A" faults may not cause rupture but are conservatively included as potentially significant as they also require further seismic study.
- **Earthquake or Landslide Risk Areas:** If liquefaction zones of high or very high susceptibility were present on site, that land area was eliminated from further consideration.
- **Designated Agricultural Lands:** If Prime Farmland or Farmland of Statewide Importance was mapped on site, it was eliminated from further consideration.
- **FEMA Flood Zones:** If areas of high flood zone risk were mapped on site, they were eliminated from further consideration.
- **Fire Threat Risks:** If areas of elevated or extreme fire risk were mapped on site, they were flagged for further study.

- **Potentially Underutilized Campus Areas:** Land area that contained the considerations noted below was considered for future CSU expansion.
  - Existing and/or Master Plan-proposed surface parking lots.
  - Large undeveloped areas and residual open spaces with unspecified use on the CSU Master Plan maps.

Existing site conditions affecting physical resiliency (liquefaction, landslides, farmable soils, floodplains, fault lines, and high-tension powerlines) are addressed within the Sustainability Analysis and Appendix Sections B.2 and B.3 of this Report and require further analysis regarding appropriateness for development.

LAND REQUIREMENTS FOR CAMPUS GROWTH METHODOLOGY

As a basis for determining land capacity for campus expansion, this Report analyzes density at four existing CSU campuses, selected based on their current campus Floor Area Ratio (FAR) (campuses over 0.30 FAR were considered moderate density and campuses under 0.29 FAR were considered low density) and regional location within the State of California (two from northern California and two from southern California). The selected campuses of Sacramento and Bakersfield were analyzed as low-density existing CSU campuses and the selected campuses of San Francisco and Los Angeles were analyzed as moderate-density existing CSU campuses. A detailed description of this study can be found in the Appendix Section A.7 of this Report.

This analysis informed average FARs, campus land utilization, and coverage ratios across different categories for low-density and moderate-density campuses. This Report uses moderate-density campus average ratios (see Table 3.12) as a standard to determine likely land area needs and the associated land acreage to meet unmet enrollment demand.

CAMPUS DENSIFICATION LAND ASSESSMENT

This Report evaluates land development strategies to accommodate an increase in FTES by Cluster which could be achieved through campus densification. Densification can take place by redeveloping underutilized land areas on campus or by the demolition of existing structures and addition of new construction in their place. Demolition may be considered if a structure is past its useful service life, needs modernization, or needs an increase in density through greater building mass or height. If sufficient underutilized land area or structures to demolish are not identified within the campus property, then the increased FTES could be accommodated through the CSU acquiring additional adjacent land.

Table 3.12 Moderate Density Campus Average Ratios

Land Utilization Category	Selected Moderate Density CSU Campuses, Average	Considered as Part of Campus Densification and Redevelopment Strategy?
Floor Area Ratio (FAR)	0.55	-
Occupied Facilities	**19%**	-
Building Footprints	19%	Yes
Non-Occupied Facilities	**81%**	-
Infrastructure	25%	-
Roads	11%	Yes
Surface Parking Footprints	9%	Yes
Structured Parking Footprints	5%	No
Open Space	56%	-
Recreational Fields	10%	No
Athletic Fields	1%	No
Campus Green Areas (including Plazas, Courtyards and Quadrangles)	11%	Yes
Residual Open Space	34%	No

Note: Refer to Appendix Section A.7 Campus Development Scenarios for definitions of Occupied and Non-Occupied Facilities.

Table 3.13 Chico Cluster Land Area and Campus Densification Strategy

CSU Campus Location	Campus Land Areas	Main Campus Acreage	Land Area to Meet Unmet Enrollment Demand (4,300 FTES)	Strategy to Support Unmet Cluster Enrollment Demand
Chico*	129 acres	Master Plan Utilized Area: 126 acres Potentially Underutilized Campus Area: 3 acres Potentially Significant Site Conditions: 0 acres	Roughly 8 acres of land area needed for approx. 166,000 GSF of new academic buildings and around 157,000 GSF of residential construction, with approximately 310 new beds.	Densify existing campus.

** Campus is currently undergoing a Master Plan update.*

Table 3.14 Sacramento Cluster Land Area and Campus Densification Strategy

CSU Campus Location	Campus Land Areas	Main Campus Acreage	Land Area to Meet Unmet Enrollment Demand (5,200 FTES)	Strategy to Support Unmet Cluster Enrollment Demand
Sacramento*	282 acres	Master Plan Utilized Area: 271 acres Potentially Underutilized Campus Area: 11 acres Potentially Significant Site Conditions: 0 acres	Roughly 20 acres of land area needed for approx. 560,000 GSF of new academic buildings and around 529,000 GSF of residential construction, with approximately 1,040 new beds	Densify existing main campus or build new at the Off-Campus Center of CSU Placer Ranch.

** Campus Off-Campus Center is currently undergoing a Master Plan.*

The program needs for the unmet capacity were projected by utilizing the CSU's ASF per FTE model. These program projections assume 65 ASF per FTES at a 60 percent ASF to GSF ratio for academic uses; residential program projections for 20 percent of student enrollment assume 333 ASF per FTES (including amenities), at a 65 percent ASF to GSF ratio. This program is massed with a generic building footprint of 30,000 SF, at a maximum of 4 stories for academic use and 5 stories for residential use. To project land area needed for non-occupied facilities, the non-occupied use ratios for infrastructure (roads and surface parking) and open space (recreation fields, campus green areas) were calculated.

Chico Cluster

The Chico State campus has 129 acres of existing campus area. Of these, 126 acres are currently master planned, leaving three acres underutilized by the Master Plan (see Tables 3.13, 3.16, and Figure 3.21). The Chico Cluster has 4,300 FTES of unmet enrollment demand, based on the current Planned Capacity of 15,800 FTES. Chico State is currently undergoing a Master Plan update, which intends to accommodate up to 18,600 FTES, an expansion of 2,800 FTES. In order to meet the remaining 4,300 FTES of unmet enrollment demand, Chico State can densify its latest campus Master Plan. Densification could occur either through the redevelopment of underutilized campus areas or the demolition of aging structures that are not performing to the highest and best university use or at the end of their useful service life; they would be replaced by higher-density, new construction to accommodate the increase in FTES.

Sacramento Cluster

The Sacramento State campus has 282 acres of existing campus area. Of these, 271 acres are currently master planned, leaving 11 acres underutilized by the Master Plan (see Tables 3.14, 3.18 and Figure 3.22). The Sacramento Cluster has 5,200 FTES of unmet enrollment demand. Sacramento State is currently developing a Master Plan for the Placer Ranch Off-Campus Center. In order to meet the remaining 5,200 FTES of unmet enrollment demand, Sacramento State can densify its main campus. Densification could occur either through the redevelopment of underutilized campus areas or the demolition of aging structures that are not performing to the highest and best university use or at the end of their useful service life; they would be replaced by higher-density, new construction to accommodate the increase in FTES.

Los Angeles Cluster

The Los Angeles Cluster includes six campuses. This Cluster has 431 FTES of unmet enrollment demand (see Tables 3.15, 3.20–3.30 and Figures 3.23–3.29), which would require approximately three acres of land, for around 47,000 GSF of new academic buildings and around 44,000 GSF of residential construction, with approximately 90 new beds. In order to meet this unmet enrollment demand, any of the Los Angeles Cluster campuses could construct the square footage needed to accommodate the 400 FTES. Fullerton is currently undergoing a Master Plan update, which intends to accommodate up to 32,000 FTES, an expansion of 7,000 FTES from its 2003 approved Master Plan. This update could accommodate all of the previously unmet enrollment demand for the Los Angeles Cluster.

Table 3.15 Los Angeles Cluster Land Area and Campus Densification Strategy

CSU Campus Location	Campus Land Area	Master Planned Campus Area	Land Area to Meet Unmet Enrollment Demand (400 FTES)	Strategy to Support Unmet Clusterl Enrollment Demand
Dominguez Hills	344 acres	Master Plan Utilized Area: 326 acres Potentially Underutilized Campus Area: 18 acres Potentially Significant Site Conditions: 0 acres	Approx. 3 acres	Build on underutilized land areas
Fullerton*	240 acres	Master Plan Utilized Area: 215 acres Potentially Underutilized Campus Area: 25 acres Potentially Significant Site Conditions: 0 acres	Approx. 3 acres	Build on underutilized land areas
Long Beach*	322 acres	Master Plan Utilized Area: 263 acres Potentially Underutilized Campus Area: 37 acres Potentially Significant Site Conditions: 22 acres	Approx. 3 acres	Build on underutilized land areas
Los Angeles	174 acres	Master Plan Utilized Area: 165 acres Potentially Underutilized Campus Area: 9 acres Potentially Significant Site Conditions: 0 acres	Approx. 3 acres	Build on underutilized land areas
Northridge	356 acres	Master Plan Utilized Area: 352 acres Potentially Underutilized Campus Area: 4 acres Potentially Significant Site Conditions: 0 acres	Approx. 3 acres	Build on underutilized land areas
Pomona*	866 acres	Master Plan Utilized Area: 509 acres (Main Campus) Potentially Underutilized Campus Area: 31 acres (Main Campus) Potentially Significant Site Conditions, Agricultural Research Fields: 326 acres (Main Campus)	Approx. 3 acres	Build on underutilized land areas

** Campus currently undergoing a Master Plan update.*

PHYSICAL INFRASTRUCTURE AVAILABILITY

Chico Cluster

Chico State's soil condition and soils and geology impacts are undetermined.[2] The Chico campus will require power, water, recycled water, and wastewater infrastructure augmentation and expansions of existing systems to support further development of the site. Significant conditions related to the utilities and service systems are unknown and will require further detailed analysis. In addition to civil infrastructure requirements, the existing central utility plant with thermal energy storage and associated hydronic distribution network will require augmentation and expansion to serve further development of the site. Chico generated 546MWh of electricity through on-site solar systems in 2013–2014 to support campus energy goals,[3] while the Pacific Gas & Electric Utility delivered 39 percent of its energy from renewable sources in 2018, according to the California Energy Commission.[4]

Sacramento Cluster

Sacramento State's soils and geology impacts are found to be less than significant.[5] The Sacramento campus will require power, water, recycled water, and wastewater infrastructure augmentation and expansions of existing systems to support further development of the site. Significant conditions related to the utilities and service systems are unknown and will require further detailed analysis. In addition to civil infrastructure requirements, the existing central utility plant with thermal energy storage and associated hydronic distribution network will require augmentation and expansion to serve further development of the site. Sacramento State generated 762Mwh of electricity through on-site solar systems in 2013–2014 to support campus energy goals,[6] while the Sacramento Municipal Utility District delivered 20 percent of its energy from renewable sources in 2018, according to the California Energy Commission.[7]

Los Angeles Cluster

For the six campuses within this Cluster, this Report provides some information regarding the soils and geology conditions; additional analysis may be required for future campus development. At the Dominguez Hills campus, there are no soils or geology impacts.[8] Less than significant soils and geology impacts were found at the

2. The Board of Trustees of the California State University and California State University, Chico. (19 April 2019). *Notice of Preparation of Environmental Impact Report for the California State University, Chico Proposed Master Plan, 6.*
3. Division of Business and Finance CSU, Chico. (2014). Going Green Sustainability Report 2014.
4. California Energy Commission Retail Electricity Supplier Annual Power Content Labels for 2018.
5. Parsons Brinckerhoff. (April 2015). *Final Environmental Impact Report Campus Master Plan 2015 California State University, Sacramento.*
6. AASHE STARS CSU, Sacramento Report. (May 2016). *OP-9: Clean and Renewable Energy.*
7. California Energy Commission Retail Electricity Supplier Annual Power Content Labels for 2018.
8. WSP US. (September 2019). *Cal State University, Dominguez Hills Environmental Impact Report,* 4.0-9.

Fullerton campus.[9] The Long Beach, Los Angeles, and Pomona campuses' soil condition and soils and geology impacts are undetermined. The Northridge campus has significant soils and geology impacts.[10]

The six campuses in the Los Angeles Cluster will each require power, water, recycled water, and wastewater infrastructure augmentation and expansions of existing systems to support further development of the sites. Significant conditions related to the utilities and service systems are unknown and will require further detailed analysis. In addition to civil infrastructure requirements, each existing central utility plant with or without thermal energy storage and associated hydronic distribution network will require augmentation and expansion to serve further development of each site. The Dominguez Hills campus's renewable energy generation is unknown. The Fullerton campus currently generates 13 percent of electricity through on-site solar systems.[11] The Long Beach campus's on-site solar system capacity was 350KW in 2014.[12] The Los Angeles campus generates 12MWh of electricity through on-site solar systems.[13] The Northridge campus generated 14 percent of its electricity through on-site fuel cell systems and 4 percent through on-site solar systems in 2014–2015.[14] The Pomona campus generated 1.9MWh of electricity through on-site solar systems in 2016–2017.[15]

For the Los Angeles Cluster overall, the Los Angeles Department of Water and Power delivered 32 percent and Southern California Edison delivered 36 percent of its energy from renewable sources in 2018, according to the California Energy Commission.[16]

ENVIRONMENTAL SUSTAINABILITY

Chico Cluster

In the Chico Cluster, California State University, Chico lies in a challenging climate zone in terms of minimizing energy infrastructure and providing a comfortable academic environment. It has moderate resilience factors, which are planned for in its Climate Action Plan (CAP). Chico State has established zero net energy (ZNE) and carbon neutrality goals for 2030. The campus has made investment into central water management systems with historical water use reduction targets, water efficient technologies, and efficient landscape maintenance practices. Green building protocols are within compliance or above CSU Sustainability Policy and California Energy Code requirements. Additionally, the campus has extensive resources for sustainable food availability and initiatives to regulate waste management. The full evaluation of the multi-criteria analysis weighs each of these environmental sub-criteria to create an aggregate score of 7.85, which indicates the campus is well aligned with sustainability attributes. Full sustainable analysis for the Chico Cluster is provided in Appendix B.2.

Sacramento Cluster

In the Sacramento Cluster, California State University, Sacramento lies within a moderate climate zone in terms of minimizing energy infrastructure and providing a comfortable academic environment with minimal resilience factors, which are planned for in the Climate Action Plan (CAP). Sacramento State does not have an established zero net energy (ZNE) or carbon neutrality goal. Campus potable water efficiency use is compliant with LEED criteria and supplemented by biofiltration systems to treat storm water. Green building protocols are within compliance or beyond CSU Sustainability Policy and California Energy Code requirements. Sacramento State reports a high waste diversion rate, and there are initiatives to supplement the campus with healthier options of fruits grown on campus. The multi-criteria analysis weighs each of these environmental sub-criteria to create an aggregate score of 6.74. Full sustainability analysis for the Sacramento Cluster is provided in Appendix B.2.

Los Angeles Cluster

The Los Angeles Cluster includes the CSU campuses of Dominguez Hills, Fullerton, Long Beach, Los Angeles, Northridge, and Pomona, all of which lie within an ideal climate zone in terms of minimizing energy infrastructure and providing a comfortable academic environment. For the purposes of this Report, Los Angeles was viewed as a Cluster of campuses that incorporate both CSU's established sustainability policy and initiatives within the City of Los Angeles' Green New Deal. The Los Angeles Cluster demonstrates leadership in energy and green building with policies that mandate zero net energy targets for all new buildings by 2030 and 100 percent zero carbon for buildings by 2050. The multi-criteria analysis weighs each of these environmental sub-criteria to create an aggregate score of 6.12. Full sustainability analysis for the Sacramento Cluster is provided in Appendix B.2.

3.5.3 CAMPUS MAPS AND TABLES

The following campus Master Plan maps were evaluated to determine whether any land areas on the CSU's main campuses were underutilized within their Master Plans (such as surface parking lots or large, undeveloped, or residual open spaces with unspecified use) and could potentially be utilized for further campus densification. Potential for building demolition and redevelopment as an additional densification strategy was not evaluated in this Report and would require further study. The data behind these maps are presented in two summary tables, one for site conditions and one for the CSU program. The methodology behind these maps, data, and tables are contained in Appendix A.4 and B.4.

9. Cotton/Bridges/Associates. (August 2003). *Final Environmental Impact Report CSU Fullerton 2003 Master Development Plan,* ES-5.
10. Impact Sciences, Inc. (February 2006). *Final Environmental Impact Report 2005 Master Plan Update California State University Northridge,* 2.0-6, 7.0-4.
11. California State University, Fullerton Capital Programs and Facilities Management Sustainability-Renewable Energy webpage.
12. California State University, Long Beach. (December 2014). *CSULB Climate Action Plan.*
13. California State University, Los Angeles. (2019). *Cal State LA Climate Action Plan.*
14. Digital Energy, Inc. (December 2015). CSUN Strategic Energy Management Plan.
15. AASHE STARS Cal Poly Pomona Report. (May 2017). OP-6: Clean and Renewable Energy.
16. California Energy Commission Retail Electricity Supplier Annual Power Content Labels for 2018.

California State University, Chico

CHICO CLUSTER

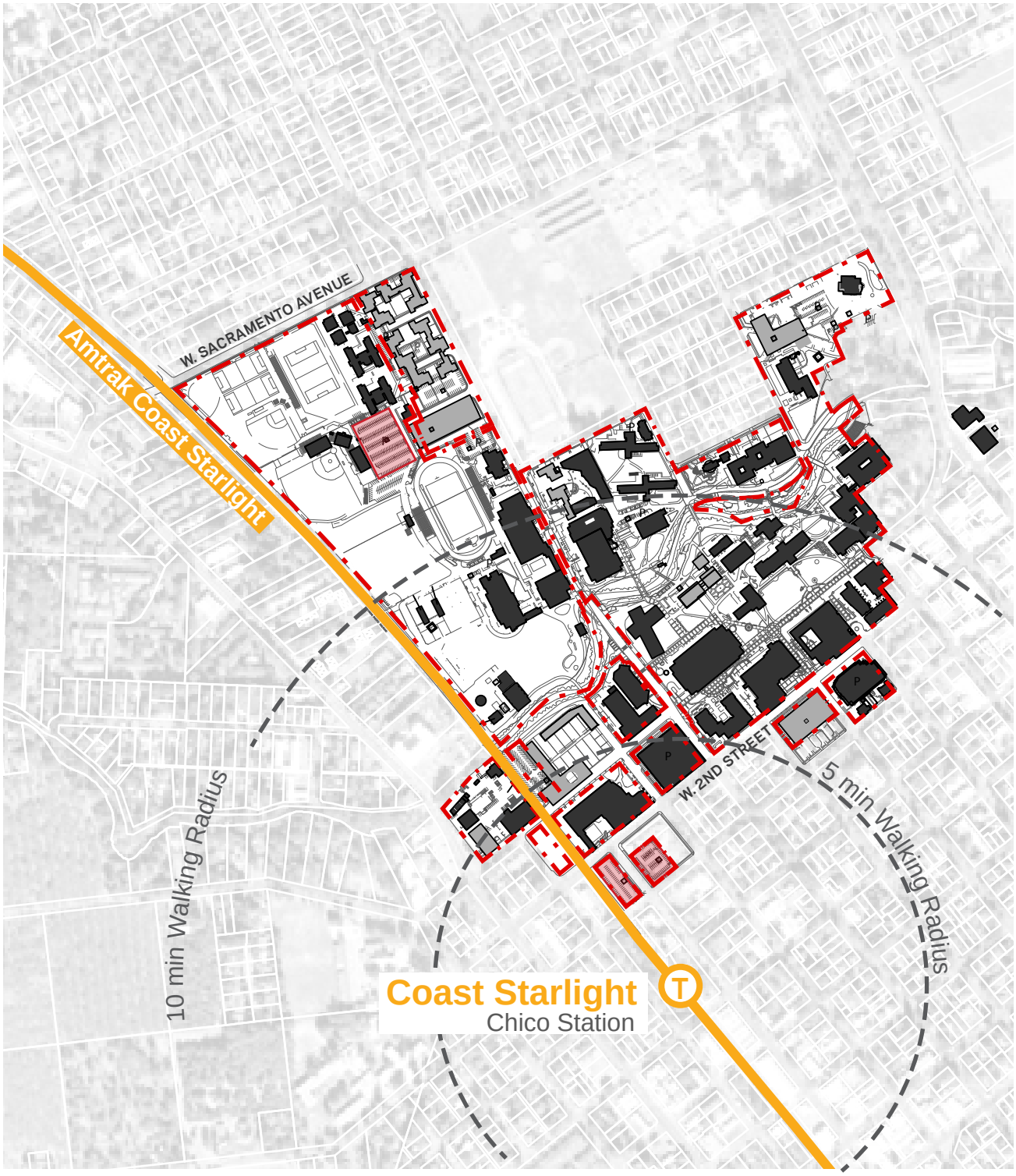


Figure 3.21 California State University, Chico - Potential Land Area for Expansion

Table 3.16 California State University, Chico Campus Summary

Site Summary Table	
Cluster	Chico
Existing Campus Density	Moderate Density
Main Campus Acreage	**129 acres**
Master Plan Utilized Area	126 acres
Potentially Underutilized Campus Area	3 acres
Potentially Significant Land Capacity Elements:	Streams, High-tension Power Lines
Potentially Significant Physical Resiliency Elements:	Fire Risk Zones
Physical Capacity	
Current Capacity	14,732 FTES
Planned Capacity	15,800 FTES
Density Metrics	
Current Density	381 SF/FTES
Planned Density	356 SF/FTES
Current Facilities FAR	0.50

Source: California State University, Chico, Campus Master Plan. (Revised July 2005).

Table 3.17 California State University, Chico Program Summary

Categories	Current Facilities	Approved Master Plan Growth
Academic / Instructional Space	1,450,000 GSF	290,000 GSF
General Administration	240,000 GSF	120,000 GSF
Commons (Library + Union)	410,000 GSF	- GSF
Auditoria / Performance with Exhibition	- GSF	- GSF
Central Plan and Facilities Support	60,000 GSF	- GSF
Student Recreation and Wellness	130,000 GSF	160,000 GSF
Residential Life / Housing	540,000 GSF	660,000 GSF
Recreational Open Space	90,000 SF	- SF
Structured Garages	310,000 GSF	1,080,000 GSF
Surface Lots	1,830,000 SF	- SF
Total	**5,060,000 GSF**	**2,310,000 GSF**

Sources: AC Martin Partners, Inc. (27 June 2005). *California State University, Chico Master Plan 2005*, 4.2. The California State University Office of the Chancellor. (2018). Campus Facility Report.

California State University, Sacramento

SACRAMENTO CLUSTER

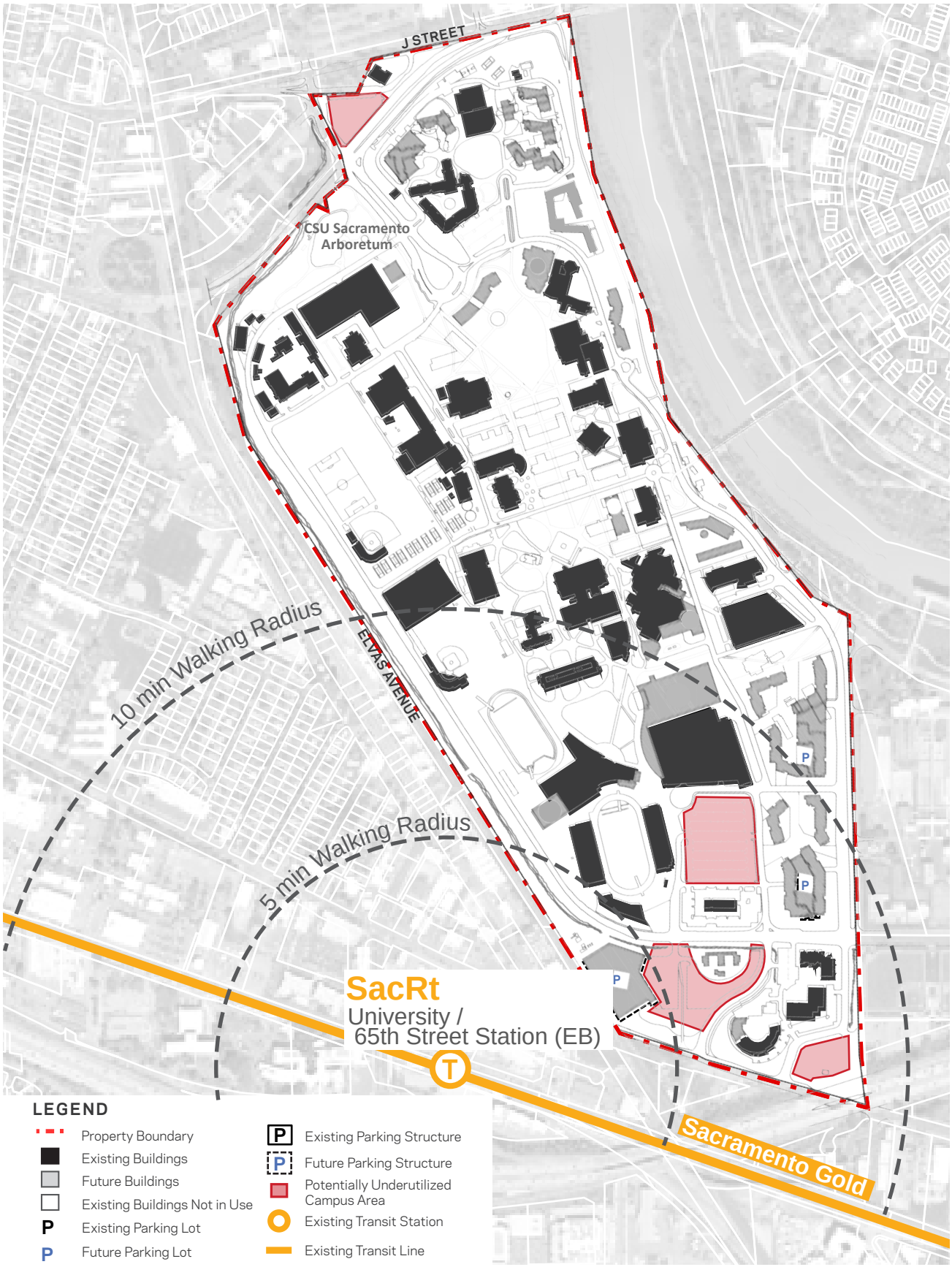


Figure 3.22 California State University, Sacramento - Potential Land Area for Expansion

Table 3.18 California State University, Sacramento Campus Summary

Site Summary Table	
Cluster	Sacramento
Existing Campus Density	Low Density
Main Campus Acreage	**282 acres**
Master Plan Utilized Area	271 acres
Potentially Underutilized Campus Area	11 acres
Potentially Significant Land Capacity Elements:	Arboretum, Large Tree Stands
Potentially Significant Physical Resiliency Elements:	Local Access to Agriculture Resources
Physical Capacity	
Current Capacity	21,311 FTES
Planned Capacity	25,000 FTES
Density Metrics	
Current Density	576 SF/FTES
Planned Density	491 SF/FTES
Current Facilities FAR	0.29

Source: California State University, Sacramento, Campus Master Plan. (Revised July 2015).

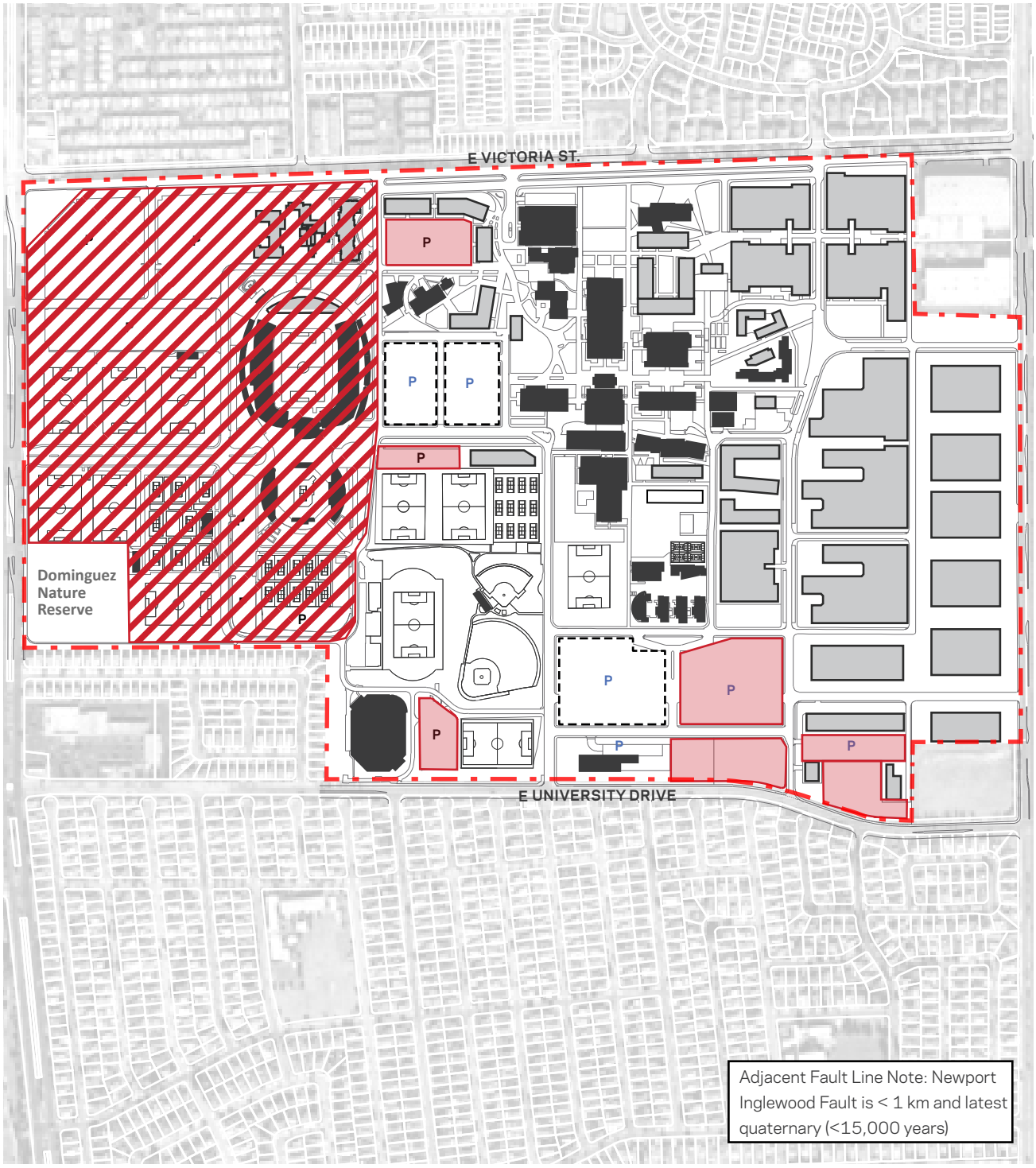
Table 3.19 California State University, Sacramento Program Summary

Categories	Current Facilities	Approved Master Plan Growth
Academic / Instructional Space	1,770,000 GSF	820,000 GSF
General Administration	290,000 GSF	- GSF
Commons (Library + Union)	750,000 GSF	- GSF
Auditoria / Performance with Exhibition	- GSF	- GSF
Central Plan and Facilities Support	70,000 GSF	- GSF
Student Recreation and Wellness	170,000 GSF	- GSF
Residential Life / Housing	550,000 GSF	- GSF
Recreational Open Space	- SF	- SF
Structured Garages	2,310,000 GSF	- GSF
Surface Lots	3,220,000 SF	- SF
Total	**9,130,000 GSF**	**820,000 GSF**

Sources: Parsons Brinckerhoff. (April 2015). *Final Environmental Impact Report Campus Master Plan 2015 California State University, Sacramento*, 2-3, 33-34. The California State University Office of the Chancellor. (2018). Campus Facility Report.

California State University, Dominguez Hills

LOS ANGELES CLUSTER



LEGEND

- Property Boundary
- Existing Buildings
- Future Buildings
- Existing Buildings Not in Use
- P — Existing Parking Lot
- P — Future Parking Lot
- P — Existing Parking Structure
- P — Future Parking Structure
- Leased Area
- Potentially Underutilized Campus Area

N 0 400 800 1600FT

Figure 3.23 California State University, Dominguez Hills - Potential Land Area for Expansion

Table 3.20 California State University, Dominguez Hills Campus Summary

Site Summary Table	
Cluster	Los Angeles
Existing Campus Density	Low Density
Main Campus Acreage	**344 acres**
Master Plan Utilized Area	326 acres
Potentially Underutilized Campus Area	18 acres
Potentially Significant Land Capacity Elements:	Dominguez Nature Reserve
Potentially Significant Physical Resiliency Elements:	Newport Inglewood fault is within 1 km - Latest Quaternary < 15,000 years, M3.7 Earthquake in April 2020, M6.4 Earthquake in March 1933, M6.0 - 7.5+ Probable, Probabilistic Ground Shaking, Local Access to Agriculture Resources
Physical Capacity	
Current Capacity	9,903 FTES
Planned Capacity	20,000 FTES
Density Metrics	
Current Density	1,513 SF/FTES
Planned Density	749 SF/FTES
Current Facilities FAR	0.09

Source: California State University, Dominguez Hills, Campus Master Plan. (Revised May 2010).

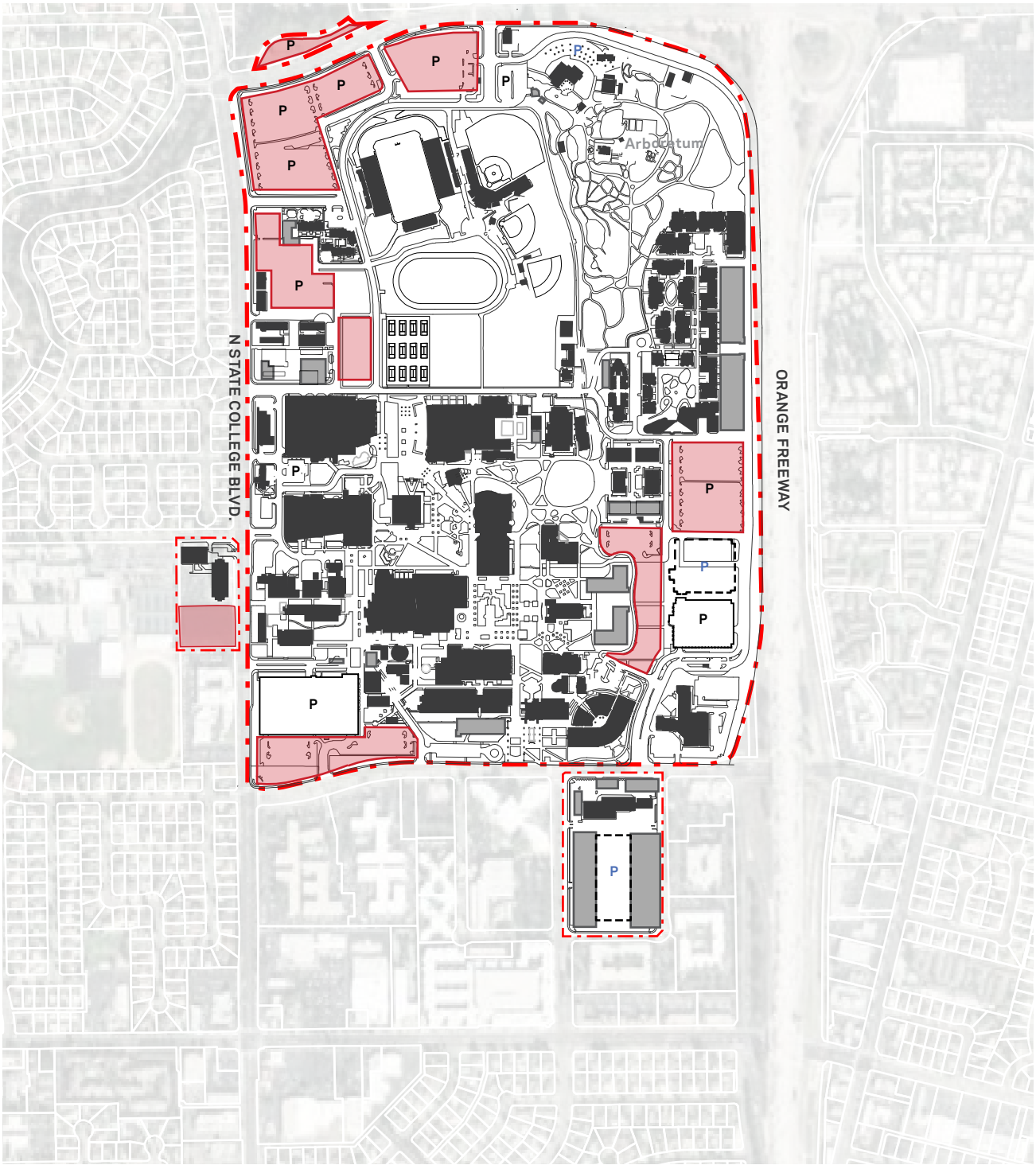
Table 3.21 California State University, Dominguez Hills Program Summary

Categories	Current Facilities		Approved Master Plan Growth	
Academic / Instructional Space	560,000	GSF	2,010,000	GSF
General Administration	230,000	GSF	40,000	GSF
Commons (Library + Union)	410,000	GSF	470,000	GSF
Auditoria / Performance with Exhibition	-	GSF	-	GSF
Central Plan and Facilities Support	30,000	GSF	20,000	GSF
Student Recreation and Wellness	20,000	GSF	110,000	GSF
Residential Life / Housing	170,000	GSF	1,800,000	GSF
Recreational Open Space	10,000	SF	1,610,000	SF
Structured Garages	-	GSF	2,160,000	GSF
Surface Lots	3,180,000	SF	670,000	SF
Total	**4,610,000**	**GSF**	**8,890,000**	**GSF**

Sources: AC Martin Partners, Inc. (2009). *Master Plan 2009 California State University Dominguez Hills*, 4.15. The California State University Office of the Chancellor. (2018). Campus Facility Report.

California State University, Fullerton

LOS ANGELES CLUSTER



LEGEND

- Property Boundary
- Future Property Boundary
- Existing Buildings
- Existing Buildings Not in Use
- Future Buildings
- P Existing Parking Lot
- P Future Parking Lot
- P Existing Parking Structure
- P Future Parking Structure
- Potentially Underutilized Campus Area

N 0 400 800 1600FT

Figure 3.24 California State University, Fullerton - Potential Land Area for Expansion

Table 3.22 California State University, Fullerton Campus Summary

Site Summary Table	
Cluster	Los Angeles
Existing Campus Density	Moderate Density
Main Campus Acreage	**240 acres**
Master Plan Utilized Area	215 acres
Potentially Underutilized Campus Area	25 acres
Potentially Significant Land Capacity Elements:	Fullerton Arboretum
Potentially Significant Physical Resiliency Elements:	Earthquake, Landslide or Liquefaction Risk, Probabilistic Ground Shaking, Fire Risk Zones, Local Access to Agriculture Resources
Physical Capacity	
Current Capacity	24,359 FTES
Planned Capacity	25,000 FTES
Density Metrics	
Current Density	429 SF/FTES
Planned Density	418 SF/FTES
Current Facilities FAR	0.35

Source: California State University, Fullerton, Campus Master Plan. (Revised November 2003).

Table 3.23 California State University, Fullerton Program Summary

Categories	Current Facilities	Approved Master Plan Growth
Academic / Instructional Space	1,480,000 GSF	490,000 GSF
General Administration	430,000 GSF	20,000 GSF
Commons (Library + Union)	660,000 GSF	50,000 GSF
Auditoria / Performance with Exhibition	260,000 GSF	- GSF
Central Plan and Facilities Support	90,000 GSF	- GSF
Student Recreation and Wellness	140,000 GSF	90,000 GSF
Residential Life / Housing	570,000 GSF	1,040,000 GSF
Recreational Open Space	- SF	- SF
Structured Garages	1,830,000 GSF	700,000 GSF
Surface Lots	3,690,000 SF	- SF
Total	**9,150,000 GSF**	**2,390,000 GSF**

Sources: Cotton/Bridges/Associates. (August 2003). *Final Environmental Impact Report CSU Fullerton 2003 Master Development Plan*, 10–11. The California State University Office of the Chancellor. (2018). Campus Facility Report.

California State University, Long Beach

LOS ANGELES CLUSTER

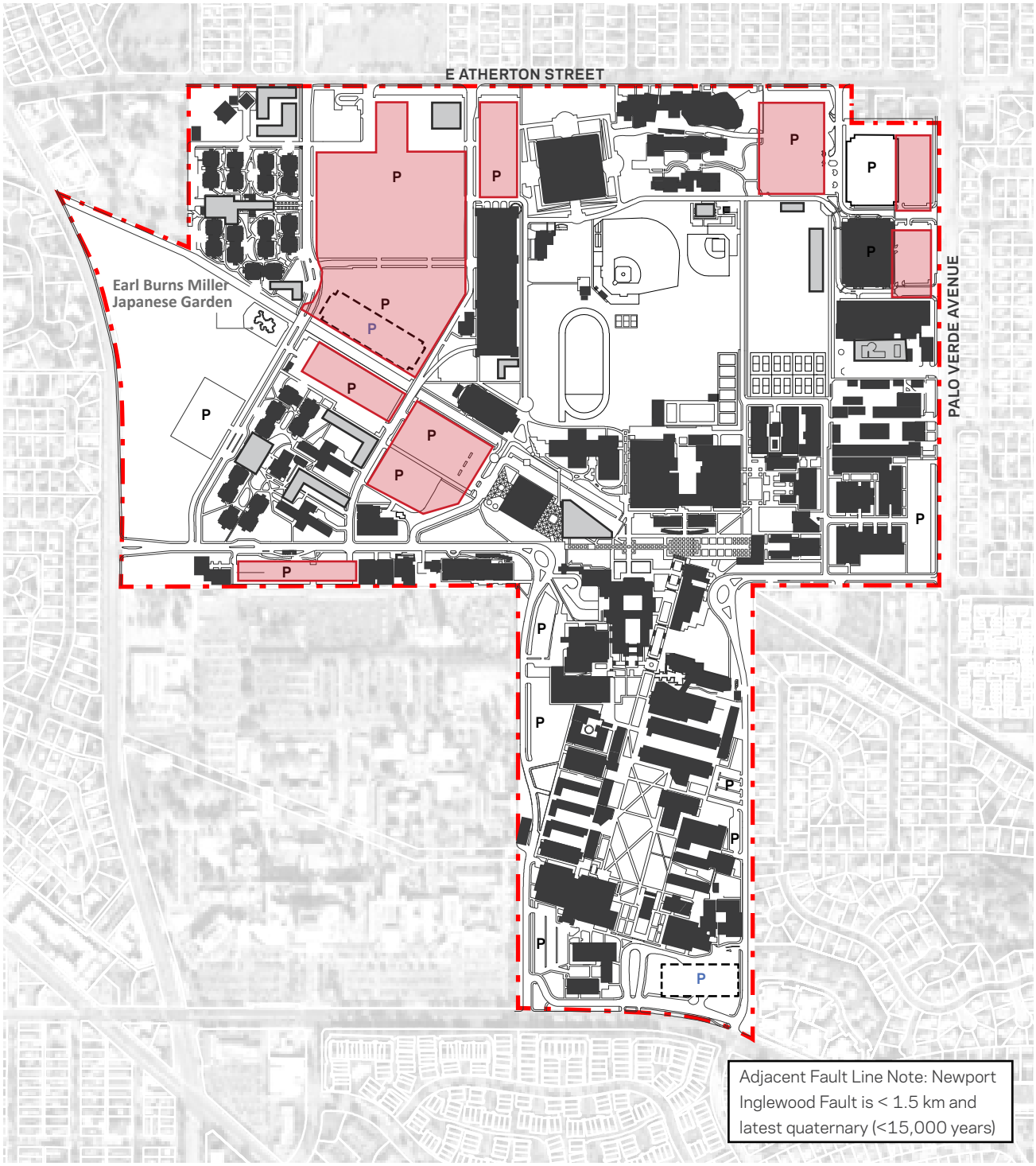


Figure 3.25 California State University, Long Beach - Potential Land Area for Expansion

Table 3.24 California State University, Long Beach Campus Summary

Site Summary Table	
Cluster	Los Angeles
Existing Campus Density	Low Density
Main Campus Acreage	**322 acres**
Master Plan Utilized Area	263 acres
Potentially Underutilized Campus Area	37 acres
Potentially Significant Land Capacity Elements: Easements	(10 acres)
Potentially Significant Land Capacity Elements: Cultural Sensitivity	22 acres
Potentially Significant Land Capacity Elements:	Streams, Easements, Earl Burns Miller Japanese Garden
Potentially Significant Physical Resiliency Elements:	Newport Inglewood fault is within 1.5 km - Latest Quaternary < 15,000 years, M6.4 Earthquake in March 1933, M6.0 - 7.5+ Probable, Earthquake, Landslide or Liquefaction Risk, Probabilistic Ground Shaking, Local Access to Agriculture Resources
Physical Capacity	
Current Capacity	26,599 FTES
Planned Capacity	31,000 FTES
Density Metrics	
Current Density	527 SF/FTES
Planned Density	453 SF/FTES
Current Facilities FAR	0.27

Source: California State University, Long Beach, Campus Master Plan. (Revised May 2008).

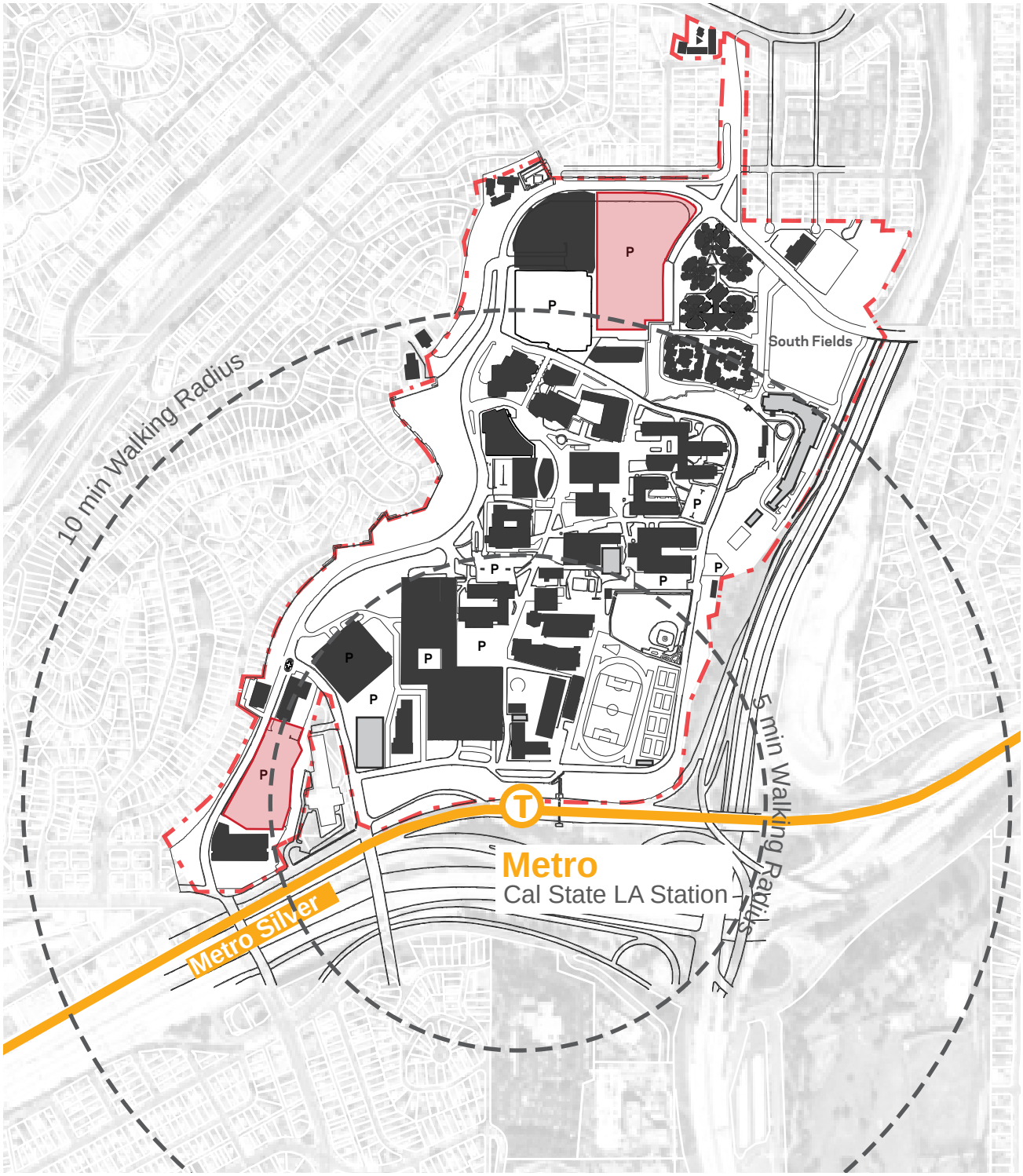
Table 3.25 California State University, Long Beach Program Summary

Categories	Current Facilities		Approved Master Plan Growth	
Academic / Instructional Space	2,140,000	GSF	260,000	GSF
General Administration	190,000	GSF	60,000	GSF
Commons (Library + Union)	680,000	GSF	10,000	GSF
Auditoria / Performance with Exhibition	-	GSF	-	GSF
Central Plan and Facilities Support	120,000	GSF	-	GSF
Student Recreation and Wellness	160,000	GSF	10,000	GSF
Residential Life / Housing	450,000	GSF	1,250,000	GSF
Recreational Open Space	-	SF	-	SF
Structured Garages	1,680,000	GSF	220,000	GSF
Surface Lots	4,140,000	SF		SF
Total	**9,560,000**	**GSF**	**1,810,000**	**GSF**

Sources: California State University, Long Beach and Rossetti/Jorgensen. (May 2008). *California State University, Long Beach Campus Master Plan Revision*, D.5. The California State University Office of the Chancellor. (2018). Campus Facility Report.

California State University, Los Angeles

LOS ANGELES CLUSTER



LEGEND

- Property Boundary
- Existing Buildings
- Existing Buildings Not in Use
- Future Buildings
- P Existing Parking Lot
- P Future Parking Lot
- P Existing Parking Structure
- P Future Parking Structure
- Potentially Underutilized Campus Area
- Existing Transit Station
- Existing Transit Line

N 0 400 800 1600FT

Figure 3.26 California State University, Los Angeles - Potential Land Area for Expansion

Table 3.26 California State University, Los Angeles Campus Summary

Site Summary Table	
Cluster	Los Angeles
Existing Campus Density	Moderate Density
Main Campus Acreage	**174 acres**
Master Plan Utilized Area	165 acres
Potentially Underutilized Campus Area	9 acres
Potentially Significant Land Capacity Elements:	None
Potentially Significant Physical Resiliency Elements:	Earthquake, Landslide or Liquefaction Risk, Probabilistic Ground Shaking, Fire Risk Zones, Local Access to Agriculture Resources
Physical Capacity	
Current Capacity	22,198 FTES
Planned Capacity	25,000 FTES
Density Metrics	
Current Density	342 SF/FTES
Planned Density	304 SF/FTES
Current Facilities FAR	0.40

Source: California State University, Los Angeles, Campus Master Plan. (Revised May 2017).

Table 3.27 California State University, Los Angeles Program Summary

Categories	Current Facilities	Approved Master Plan Growth
Academic / Instructional Space	1,950,000 GSF	- GSF
General Administration	130,000 GSF	- GSF
Commons (Library + Union)	560,000 GSF	- GSF
Auditoria / Performance with Exhibition	10,000 GSF	- GSF
Central Plan and Facilities Support	80,000 GSF	- GSF
Student Recreation and Wellness	40,000 GSF	- GSF
Residential Life / Housing	230,000 GSF	- GSF
Recreational Open Space	10,000 SF	- SF
Structured Garages	1,190,000 GSF	- GSF
Surface Lots	2,180,000 SF	- SF
Total	**6,380,000 GSF**	**- GSF**

Source: The California State University Office of the Chancellor. (2018). Campus Facility Report.

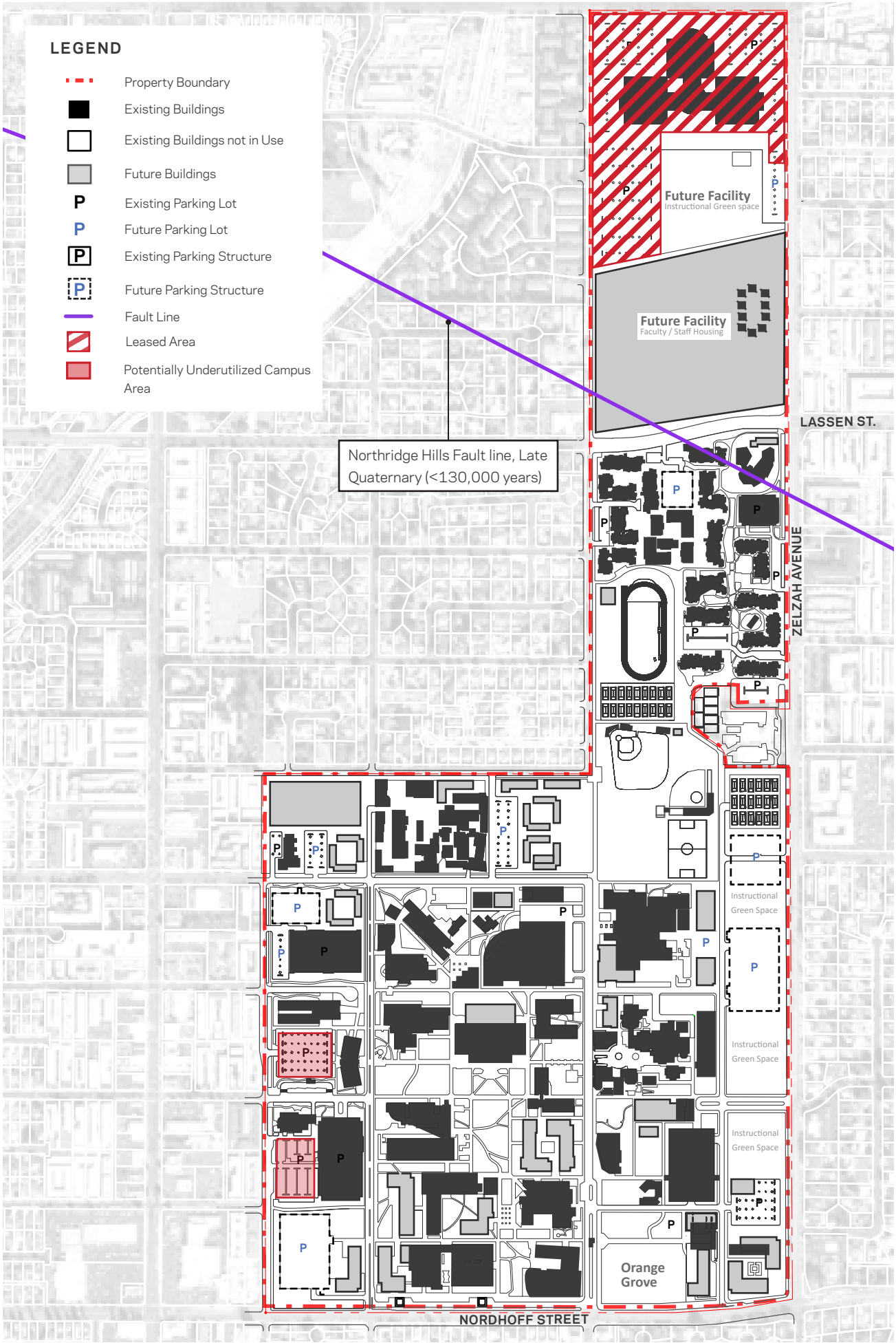


Figure 3.27 California State University, Northridge - Potential Land Area for Expansion

California State University, Northridge

LOS ANGELES CLUSTER

Table 3.28 California State University, Northridge Campus Summary

Site Summary Table	
Cluster	Los Angeles
Existing Campus Density	Low Density
Main Campus Acreage	**356 acres**
Master Plan Utilized Area	352 acres
Potentially Underutilized Campus Area	4 acres
Potentially Significant Land Capacity Elements:	Large Tree Stands, Orange Grove
Potentially Significant Physical Resiliency Elements:	Northridge Hills Fault Line - Late Quaternary < 130,000 years, M6.7 Earthquake in 1994, Falls in Alquist-Priolo (AP) Regulated Earthquake Fault Zone, Probabilistic Ground Shaking, Fire Risk Zones, Local Access to Agriculture Resources
Physical Capacity	
Current Capacity	26,667 FTES
Planned Capacity	35,000 FTES
Density Metrics	
Current Density	582 SF/FTES
Planned Density	443 SF/FTES
Current Facilities FAR	0.29

Source: California State University, Northridge, Campus Master Plan. (Revised July 2018).

Table 3.29 California State University, Northridge Program Summary

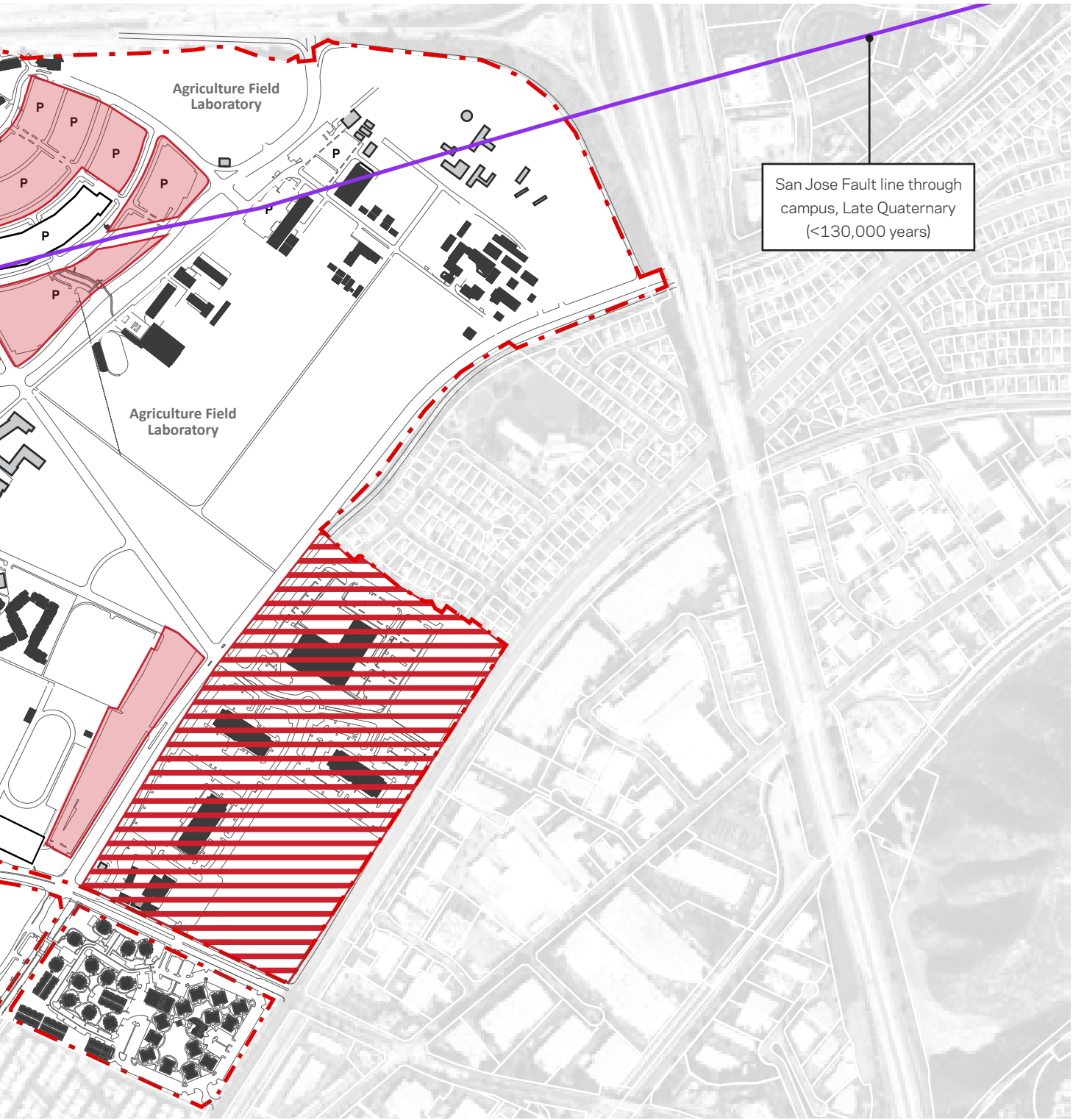
Categories	Current Facilities		Approved Master Plan Growth	
Academic / Instructional Space	1,940,000	GSF	1,500,000	GSF
General Administration	280,000	GSF	30,000	GSF
Commons (Library + Union)	680,000	GSF	160,000	GSF
Auditoria / Performance with Exhibition	170,000	GSF	160,000	GSF
Central Plan and Facilities Support	120,000	GSF	-	GSF
Student Recreation and Wellness	160,000	GSF	130,000	GSF
Residential Life / Housing	1,130,000	GSF	530,000	GSF
Recreational Open Space	1,030,000	SF	2,330,000	SF
Structured Garages	1,700,000	GSF	3,590,000	GSF
Surface Lots	3,120,000	SF	38,740,000	SF
Total	**10,330,000**	**GSF**	**47,170,000**	**GSF**

Sources: AC Martin Partners, Inc. (2005). *California State University Northridge 2005 Master Plan Update*, 83-86. The California State University Office of the Chancellor. (2018). Campus Facility Report.

California State Polytechnic University, Pomona

LOS ANGELES CLUSTER

Figure 3.28 California State Polytechnic University, Pomona - Potential Land Area for Expansion


Agriculture Field Laboratory
Agriculture Field Laboratory
P
San Jose Fault line through campus, Late Quaternary (<130,000 years)
N
0
400
800
1600FT

California State Polytechnic University, Pomona

LOS ANGELES CLUSTER

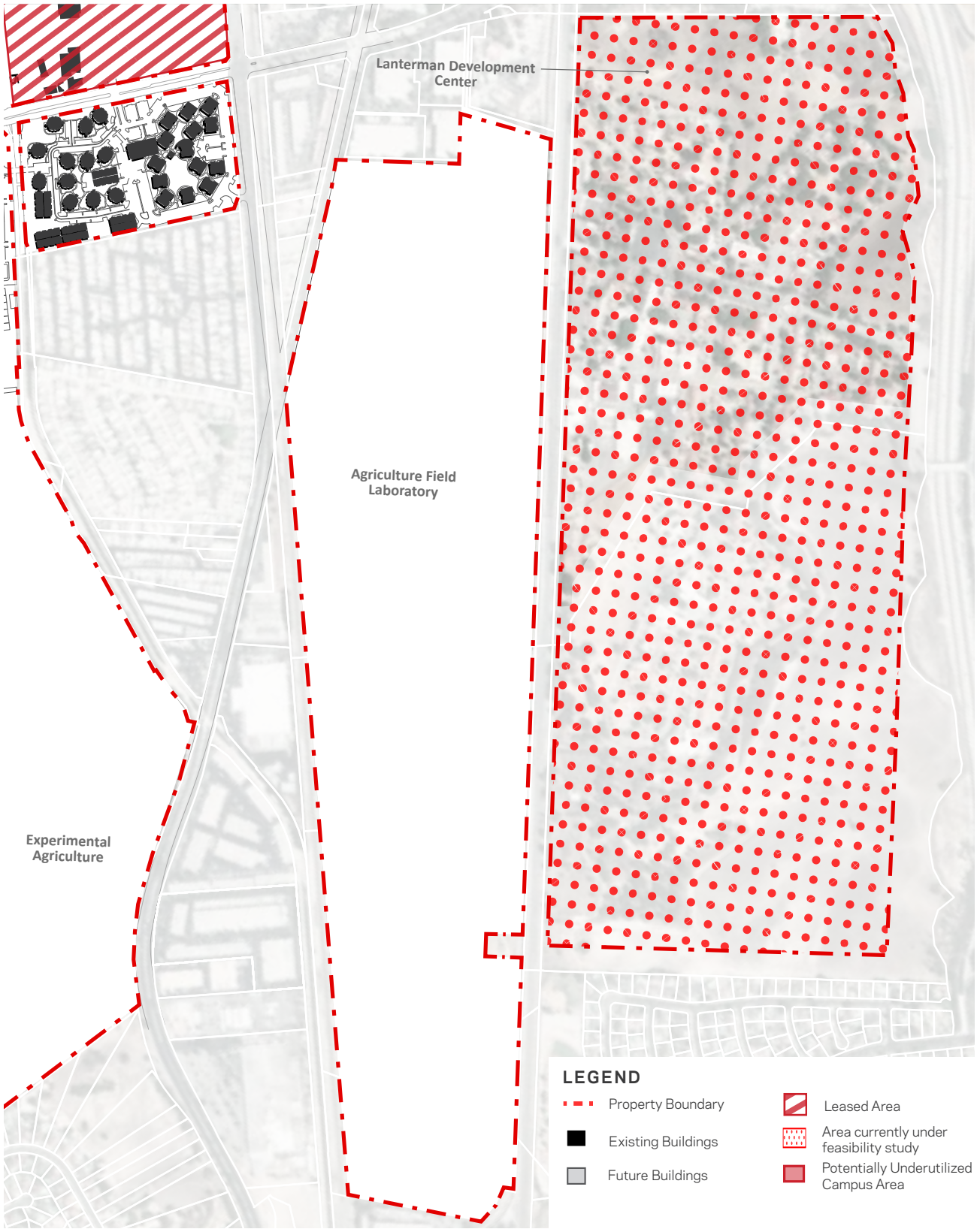


Figure 3.29 California State Polytechnic University, Pomona - Potential Land Area for Expansion

Table 3.30 California State Polytechnic University, Pomona Campus Summary

Site Summary Table	
Cluster	Los Angeles
Existing Campus Density	Low Density
Main Campus Acreage	**866 acres**
Potentially Significant Land Capacity Elements: Agricultural Research Fields	326 acres
Master Plan Utilized Area	509 acres
Potentially Underutilized Campus Areas	31 acres
Potentially Significant Land Capacity Elements:	Large Tree Stands, Voorhis Park, Agriculture Field Laboratory
Potentially Significant Physical Resiliency Elements:	San Jose fault line through Campus - Late Quaternary < 130,000 years, 5.4 Magnitude Earthquake in 1990, Earthquake, Landslide or Liquefaction Risk, Probabilistic Ground Shaking, Fire Risk Zones, Local Access to Agriculture Resources
Agricultural Research Fields (off-campus)	456 acres
Lanterman Development Center (off-campus)	263 acres
Physical Capacity	
Current Capacity	18,301 FTES
Planned Capacity	20,000 FTES
Density Metrics	
Current Density	2,061 SF/FTES
Planned Density	1,886 SF/FTES
Current Facilities FAR	0.10

Source: California State Polytechnic University, Pomona, Campus Master Plan. (Revised November 2016).

Table 3.31 California State Polytechnic University, Pomona Program Summary

Categories	Current Facilities	Approved Master Plan Growth
Academic / Instructional Space	1,870,000 GSF	950,000 GSF
General Administration	210,000 GSF	200,000 GSF
Commons (Library + Union)	580,000 GSF	50,000 GSF
Auditoria / Performance with Exhibition	- GSF	- GSF
Central Plan and Facilities Support	80,000 GSF	- GSF
Student Recreation and Wellness	150,000 GSF	- GSF
Residential Life / Housing	930,000 GSF	460,000 GSF
Recreational Open Space	10,000 SF	- SF
Structured Garages	750,000 GSF	1,290,000 GSF
Surface Lots	2,310,000 SF	- SF
Total	**6,890,000 GSF**	**2,950,000 GSF**

Sources: California State Polytechnic University, Pomona, Facilities Planning and Robbins Jorgensen Christopher. (July 2000). The California State University Office of the Chancellor. (2018). Campus Facility Report.

3.6 Enrollment Demand and Capacity Assessment Conclusions

SOCIODEMOGRAPHIC CONTEXT

Among the Studied Clusters, the Inland Empire and Upper Central Valley Clusters have the highest ability to serve low-income and first-generation students, as youth poverty rates are above the statewide average (19.5 percent) in the Upper Central Valley (23 percent) and Inland Empire (22 percent) Clusters; other Clusters are closer to or below the state average. Similarly, these two Clusters fall below the state average share of population with higher education degrees (34 percent), at 28 percent for the Inland Empire and 25 percent for the Upper Central Valley. The population in the Inland Empire and Bay Area Clusters grew substantially faster than the statewide average (11.4 percent) between 2008 and 2018, while San Joaquin County, the Upper Central Valley Cluster, and the San Diego Cluster grew at a pace closer to the statewide average. San Joaquin County has a notably higher unemployment rate (6 percent) than all the Studied Clusters and the state average (4 percent).

CURRENT ENROLLMENT AND STUDENT CHARACTERISTICS

The Los Angeles, Bay Area, and San Diego Clusters account for two-thirds of systemwide Current Enrollment. Thirty-seven percent of the CSU's Current Enrollment is in the Los Angeles Cluster, followed distantly by the Bay Area and San Diego Clusters, where campuses account for 18 and 11 percent of systemwide Current Enrollment, respectively. CSU students generally enroll at campuses within the Cluster where they graduated from high school, with the exception of certain campuses in the Central Coast, Chico, and North California Clusters. The CSU system averages 47 percent enrollment by traditionally underrepresented minorities and over 50 percent first-generation students, with highest shares in the Upper Central Valley and Inland Empire Clusters. Los Angeles and Bay Area Cluster campuses serve the largest total populations within a 45-minute drive. Los Angeles campuses generally serve populations with lower educational attainment, while Bay Area campuses generally serve populations with higher educational attainment and higher median incomes than the statewide average.

PROJECTED ENROLLMENT DEMAND

Overall, the CSU system is expected to see an increase in enrollment demand of approximately 44,000 students, in contrast to anticipated stagnant growth and modest decline in statewide population. The Cluster with the least growth is projected to be the Los Angeles Cluster, losing approximately 3,400 potential students between 2019 and 2035, while the Cluster with the most growth is the Central Valley Cluster, gaining approximately 10,400 potential students between 2019 and 2035. Certain initiatives now underway to improve K-12 and CCC education outcomes in San Joaquin County, located in the Upper Central Valley Cluster, have the potential to change historical trends underlying the CSU enrollment projections presented in this Report. Although the enrollment demand projection that is analyzed in this Report reflects the most likely scenario, it does not fully account for potential unmet demand that is masked by funding constraints and impaction across the CSU system.

CURRENT CAPACITY ASSSESSMENT

Current face-to-face instruction exceeds Current Capacity in all Clusters except North California. Across the system, the CSU instructed roughly 17 percent more students than the implied Current Capacity of its campuses. Current face-to-face instruction is 83 percent of Planned Capacity across all campuses. The Sacramento Cluster already exceeds its Planned Capacity by 553 FTES (2 percent) at current enrollment levels. The Chico Cluster is currently at 99 percent of its Planned Capacity at current enrollment levels. Current Capacity is 71 percent of the combined Planned Capacity across all campuses.

Eighty percent of systemwide face-to-face instruction occurs within classrooms and teaching labs. The remaining 20 percent occurs within a wide variety of non-capacity instructional spaces that are in service to campus needs but that have not historically been primarily used for instruction. Hence, while many campuses might not appear to reach the target utilization of their capacity instructional spaces, they might well be achieving an efficient use of their space when considering the entirety of instructional modes and spaces. While some nontraditional teaching environments like offices or flexible non-classroom spaces are suitable for some courses or modalities of instruction, several nontraditional settings could be considered less than ideal for instruction.

Twenty-four percent of 2019 summer student enrollment benefited from state-funded courses (8,839 FTES). Statewide 2019 summer enrollment represents 11 percent of Current Capacity across all CSU campuses. Increased summer enrollment could not only further student attainment goals, it could also allow the CSU to better leverage its existing capacity. However, the state will need to make a long-term funding commitment as a reliable strategy to enable a greater number of students and faculty to participate in summer term, particularly students and faculty in impacted degree programs.

PLANNED CAPACITY ASSESSMENT

The 2035 projected enrollment will exceed the Planned Capacity in three Clusters: Sacramento by 21 percent (approximately 5,200 FTES); Chico by 27 percent (approximately 4,300 FTES); and Los Angeles by 1 percent (approximately 400 FTES). The Bay Area Cluster will be at its capacity limit, while all other Clusters show sufficient Planned Capacity to accommodate the projected enrollment demand. However, in order to meet the projected enrollment demand, the CSU system will be required to increase its Current Capacity by 120,000 FTES across all Clusters. This includes and accounts for the Planned Capacity increases needed in the Sacramento, Chico, and Los Angeles Clusters. None of the Evaluated Locations are located within the three Clusters that exceed their Planned Capacity.

4.0 Workforce Demand, Academic Program, and Campus Typologies

This section of the Report begins with a summary of the key industries and occupations within the State of California and the four Clusters containing the Five Evaluated Locations ("Studied Clusters")—the Bay Area, Upper Central Valley, Inland Empire, and San Diego Clusters. Next, the section presents projections of future CSU degree conferral as related to occupational demand, including academic program considerations and an identification of supply gaps between total occupational demand and projected degree conferral statewide and in detail for each of the Studied Clusters. The findings of the first parts of this section (4.1 and 4.2) are drawn from a detailed projection of future CSU degree conferral through 2026 for the State of California, as compared to the occupational demand relevant to specific types of CSU-offered bachelor's and master's degrees. The subsequent three sections (4.3, 4.4, and 4.5) shift focus to the interrelated subjects of academic program, campus typologies, and generational learning styles. These three connected subjects are informed by detailed spatial and curricular analysis of the existing 23 main campuses as well as national trends in higher education.

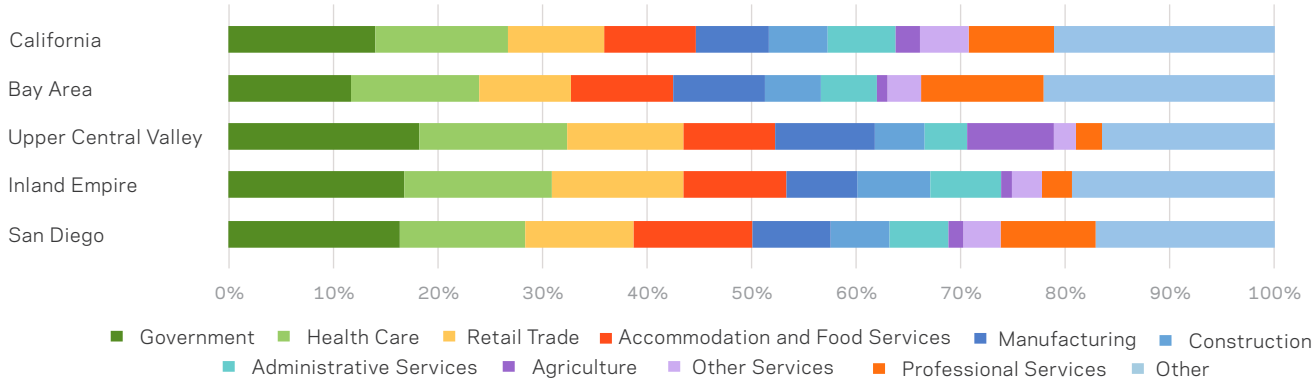
4.1 Workforce Demand Assessment

4.1.1 INDUSTRY AND OCCUPATIONAL CONTEXT

This section describes industry composition and historical trends that drive occupational demand and variation in the mix of occupations across individual Clusters. Employment in California is largely concentrated within five major industries. Over half of all California workers are employed in government (14 percent), health care (13 percent), retail trade (9 percent), accommodation and food services (9 percent), and manufacturing (7 percent). Among these top industries, only government and health care include meaningful concentrations of occupations that require bachelor's degrees or higher, although all industries include various forms of management-related and technical occupations. The employment composition of the Studied Clusters is similar to that of California as a whole, although the Bay Area and San Diego Clusters have larger concentrations of professional services jobs than the Upper Central Valley and Inland Empire Clusters (see Figure 4.1). This reflects the dramatic growth of high-wage jobs requiring bachelor's degrees or higher in the Bay Area and San Diego Clusters, as technology and related industries contained in the professional services category have driven wage growth over the past decade. In contrast, the high proportion of low- to medium-wage jobs in the Upper Central Valley and Inland Empire Clusters, such as agriculture and construction, have contributed to a relatively slow growth of wages over time (see Figure 4.2). Travel, hospitality, and leisure employees are represented within the accommodation and food services industry, and are slightly more concentrated in the San Diego and Inland Empire Clusters (11 percent and 10 percent, respectively) than the statewide average (9 percent).

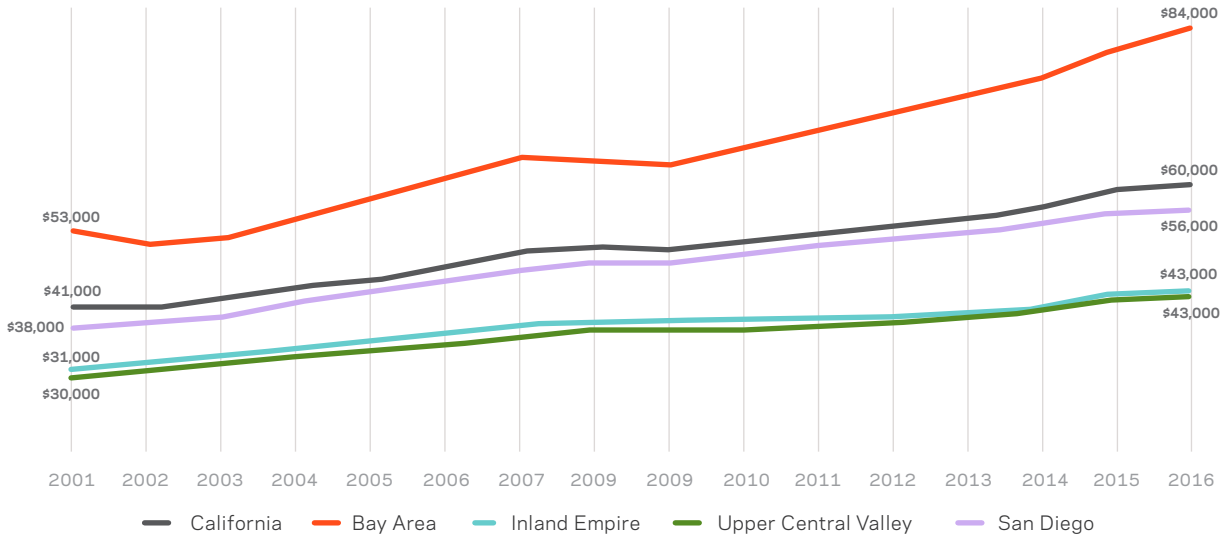
In California as a whole, wages have grown 48 percent, not adjusted for inflation, since 2001, a trend that the San Diego Cluster has largely followed (see Figure 4.2). The Bay Area is a notable exception to this growth among the Studied Clusters and statewide, as average wages have grown 60 percent since 2001, due to wage growth over 150 percent since 2001 in highly skilled information technology and related industries. In contrast, the Inland Empire and Upper Central Valley Clusters have grown more slowly than the state average, due in large part to their different industry makeup and composition of lower-wage occupations. As shown in Table 4.1, highly skilled industry sectors, particularly those requiring technical expertise, pay as much as five times the salary of some industry sectors that require lesser skills and employ fewer full-time employees (the average annual wage is $122,000 in professional, scientific, and technical services as compared to $25,000 in accommodation and food services). Regional industry concentrations reinforce the wage growth disparity, as highly

Figure 4.1 Top Ten Industries by Employment for Studied Clusters (2018)



Source: Emsi. (2019). Industry characteristics data.

Figure 4.2 Average Wage Growth from 2001 to 2016 for Studied Clusters (in Nominal Dollars)



Source: Emsi. (2017). Earnings data.

skilled and higher-wage industries co-locate with employee talent and economic growth opportunities. Stakeholders in the City of Stockton specifically expressed concern that the slow growth of regional wages has caused "brain drain" within the community, as students leave the area for higher education and find higher-skilled and higher-wage jobs requiring bachelor's degrees elsewhere, and rarely return.

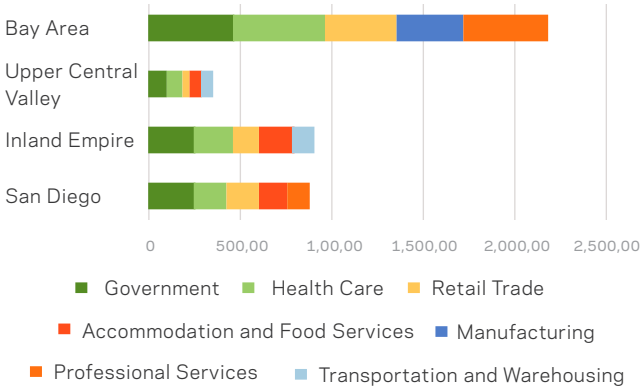
Within each Cluster, jobs are concentrated in the government, health care, and accommodation and food services industries, similar to the statewide patterns. Industry diversity is an indicator of overall economic strength and resilience, and the industry composition of individual Clusters and major employers drives occupational demand. In particular, concentrations of jobs in professional services and health care drive demand for qualified college graduates, while fewer jobs related to accommodation and food services, logistical (transportation and warehousing), manufacturing, and retail trade generate occupational demand requiring a bachelor's degree or higher. The economy of the Bay Area Cluster is moderately more diverse, as the top five industries are more equally weighted and make up 54 percent of all jobs (see Figure 4.3). In contrast, the top five industries in the Upper Central Valley Cluster are heavily weighted toward government and health care, and the top five industries collectively make up 62 percent of all jobs. The Upper Central Valley Cluster has major anchor employers in health care, logistics and retail, and education industries, with 3,800 combined jobs at Kaiser Permanente and Sutter Health, 3,900 combined jobs at Amazon and Walmart, and 2,900 combined jobs at the University of California and University

Table 4.1 Top 10 Industries in California by Total Jobs (2018)

Industry	Total Jobs	Jobs as a Percent of Total Employment	Average Annual Wage
Government	2,804,000	16%	$66,000
Health Care and Social Assistance	2,353,000	13%	$52,000
Retail Trade	1,684,000	9%	$37,000
Accommodation and Food Services	1,673,000	9%	$25,000
Manufacturing	1,320,000	7%	$96,000
Professional, Scientific, and Technical Services	1,304,000	7%	$122,000
Administrative and Support, Waste Management and Remediation Services	1,129,000	6%	$45,000
Construction	886,000	5%	$71,000
Wholesale Trade	701,000	4%	$78,000
Other	4,195,000	23%	$84,000

Source: Emsi. (2019). Industry characteristics data.

Figure 4.3 Top 5 Industries by Total Jobs for Studied Clusters (2018)



Source: Emsi. (2019). Industry characteristics data.

of the Pacific. Within the Inland Empire Cluster, major anchor employers dominate the same industries, with 5,400 jobs at Kaiser Permanente, 9,800 combined jobs at Amazon and Walmart, and 8,800 combined jobs at the University of California and Loma Linda University. Stakeholders in the City of Palm Desert noted that hospitality and agriculture are among the top industries, both of which typically support low-wage positions that generally do not require bachelor's degrees and pay less than $15 per hour.

In all four Clusters, the largest share of numerical job growth is anticipated in the health care industry, where, on average, wages range from $45,000 in the Inland Empire Cluster to $65,000 in the Bay Area Cluster. In the Bay Area Cluster, the most rapid growth (in percentage terms) is anticipated in high-paying industries, including information and professional services (see Table 4.2). As noted by stakeholders in the City of Concord and San Mateo County, these industries frequently require a bachelor's degree or higher, and with a limited local talent pool, companies continue to import new workers to the area. In contrast, job growth in the Upper Central Valley and Inland Empire Clusters is projected largely in low- and middle-wage industries, including transportation and warehousing, accommodation and food services, and construction, which do not require a bachelor's degree or higher, generating less demand for CSU graduates.

Across all four Clusters, stakeholders voiced concern that the local workforce is unable to keep up with the growth in occupations that require a bachelor's degree or higher. This includes an overall undersupply of workers in health care, ranging from physicians to nurse practitioners, which indicates the regions will struggle to fulfill anticipated employment demand. Stakeholders in the City of Stockton noted a significant undersupply of teachers, and stated that local school districts currently depend on substitute teachers to operate the K-12 education system.

4.1.2 SAN JOAQUIN COUNTY (STOCKTON) WORKFORCE ANALYSIS

As shown in Figure 4.4, the San Joaquin County industry distribution is similar to the state-level industry distribution in that over half of all workers in San Joaquin County are employed

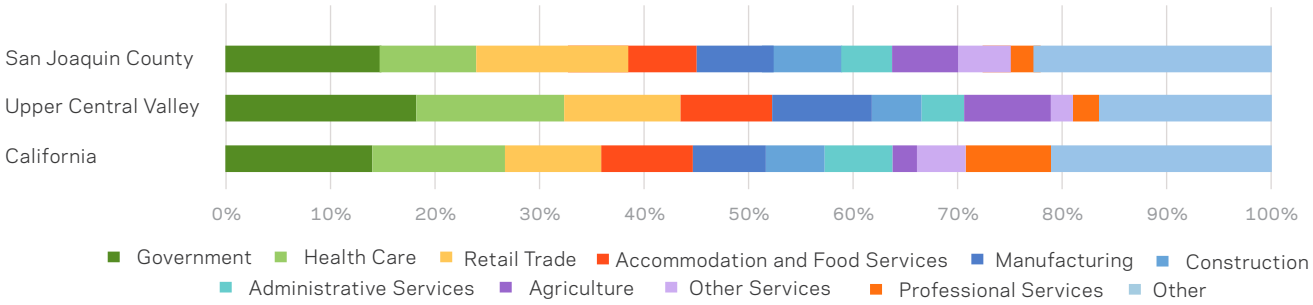
Table 4.2 Projections for Growth Among Top 5 Industries in California and Four Studied Clusters (2016-2026)

State/Cluster	2016-2026 Projected Job Growth in Top 5 Industries	Average Wages Among Top 5 Industries	Annual Job Growth Rate of Top 5 Industries
California	1,798,000	$74,100	2.3%
Bay Area	483,300	$136,700	2.4%
Upper Central Valley	69,800	$58,800	2.1%
Inland Empire	246,500	$57,500	2.6%
San Diego	153,300	$74,300	1.5%

Source: State of California Employment Development Department. (2017). Long-Term Industry Employment Projections.

Note: All data projections were prepared by CalEDD in 2016 and do not anticipate the impacts of the COVID-19 pandemic.

Figure 4.4 San Joaquin County Top 10 Industries (2018)



Source: Emsi. (2019). Industry characteristics data.

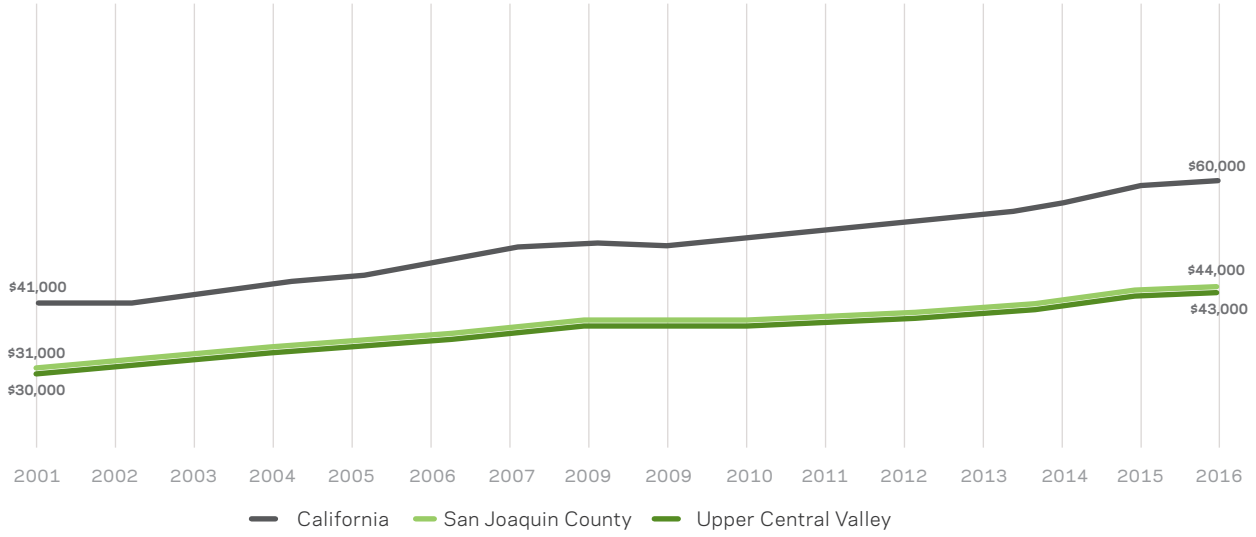
in government (16 percent), health care (12 percent), retail trade (10 percent), accommodation and food services (7 percent), and manufacturing (7 percent). The largest employers in the county are in health care, education, and government, including Kaiser Permanente (1,626 employees), University of the Pacific (1,210 employees), and Stockton Unified School District (1,105 employees). San Joaquin County has a large share of employees in transportation and warehousing, and companies such as Amazon and Walmart are among the top employers in the county. Another noteworthy deviation from statewide averages is a significantly lower share of jobs in the professional service industry requiring bachelor's degrees or higher (2 percent in San Joaquin County versus 8 percent in California).

Wage growth in San Joaquin County is similar to growth in the Upper Central Valley Cluster (see Figure 4.5), both of which grew more slowly than the statewide average and are lower overall.

Average wages in San Joaquin County grew roughly 40 percent between 2001 and 2016, whereas wages in California grew nearly 48 percent. This growth rate is only slightly greater than the rate of inflation over the same period (36 percent), indicating relatively minimal growth in purchasing power. Compounded annually, the growth rate in San Joaquin County from 2001 to 2016 and the inflation rate were nearly equal (2.24 percent compounded annual growth rate [CAGR] in San Joaquin County as compared to 2.22 percent annual inflation), while wages in California grew at roughly 2.8 percent, meaningfully higher than inflation.

As shown in Table 4.3, the top industries by total employment are heavily weighted towards the top four industries, which account for almost 50 percent of all jobs, indicating a relatively non-diversified economic base similar to that of the Upper Central Valley Cluster. The top 10 industries in San Joaquin County have relatively lower wages than professional service, information, and management

Figure 4.5 San Joaquin County Average Wage Growth (2001-2016)



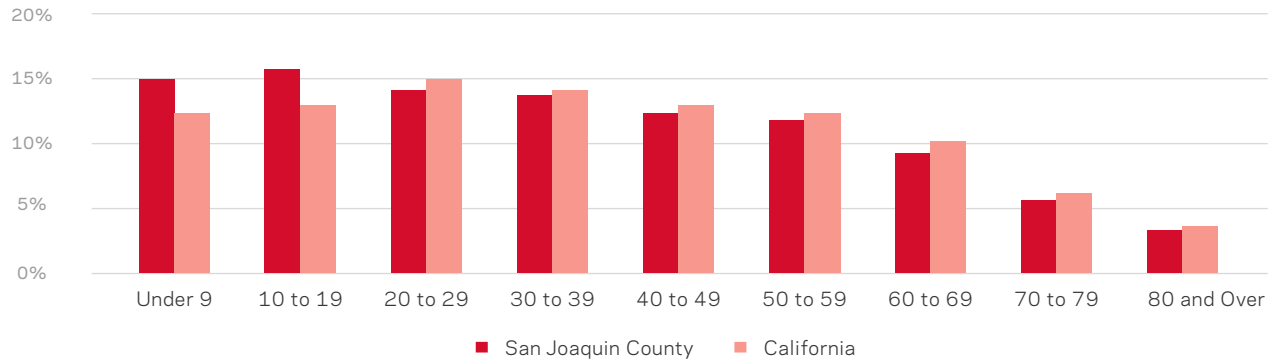
Source: Emsi. (2019). Earnings data.

Table 4.3 San Joaquin County Top 10 Industries Ranked by Total Jobs (2018)

Industry	Total Jobs	Jobs as a Percent of Total Employment	Average Annual Wage
Government	44,300	16%	$59,200
Health Care and Social Assistance	34,900	12%	$49,600
Transportation and Warehousing	29,000	10%	$47,200
Retail Trade	28,000	10%	$31,700
Accommodation and Food Services	20,300	7%	$19,600
Manufacturing	20,100	7%	$56,000
Agriculture, Forestry, Fishing and Hunting	17,000	6%	$37,200
Construction	15,900	6%	$58,200
Administrative and Support; Waste Management and Remediation Services	15,200	5%	$33,900
Wholesale Trade	12,800	5%	$59,600
Other	42,200	15%	$49,800

Source: Emsi. (2019). Industry characteristics data.

Figure 4.6 San Joaquin County Age of Population (2018)



Source: Emsi. (2019). Population demographics data.

industries, which collectively make up only 4 percent of the San Joaquin County workforce and have large concentrations of jobs requiring a bachelor's degree or higher.

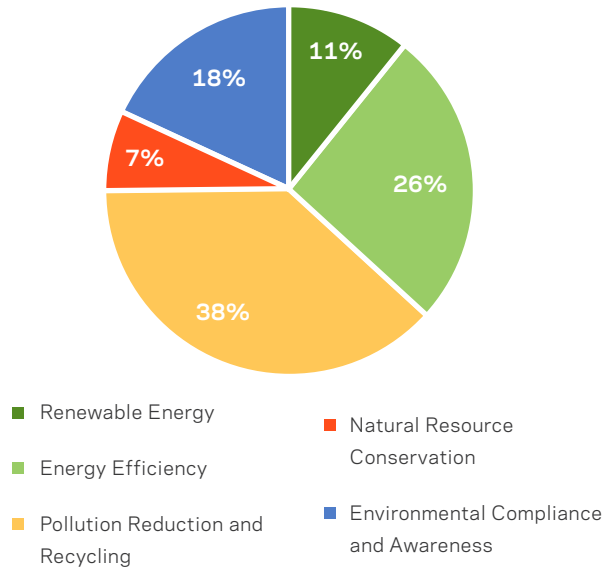
Stakeholders noted that limited high-wage opportunities drive high school graduates out of San Joaquin County and the City of Stockton, which is reflected in the overall age distribution of San Joaquin County (see Figure 4.6). As compared to California, San Joaquin County has a higher proportion of residents under age 20 and a lower proportion of all working age groups, particularly younger working-age adults between 20 and 29 years old. San Joaquin County has a slightly lower proportion of older adults than the statewide average, indicating that there may be fewer future openings in higher-skilled occupations requiring a bachelor's degree or above created by future retirements. This may include engineering degrees that qualify students for a range of occupations across sectors.

4.1.3 GREEN JOBS AND FUTURE OF WORK

California is a national leader in sustainability and associated occupations. Ambitious greenhouse gas (GHG) emissions reduction policies at the city, county, and state level have driven an unprecedented demand for innovation in "cleantech" industries, creating opportunities for job growth in industries ranging from renewable energy installation to electric vehicle charging maintenance to LEED-certified building construction. Despite the perceived growth of the "green economy," there is not currently a widely agreed upon definition for what industries and occupations constitute a "green job." Similarly, there is not a singular methodology for assessing the number of green jobs. The most comprehensive study to date is the U.S. Bureau of Labor Statistics (BLS) Green Goods and Services Survey, performed in 2010 and again in 2011, before being discontinued because of Federal Government sequestration. That assessment defined green jobs as either jobs in businesses that produce green goods or services or jobs in traditional businesses that are responsible for making their establishment's production process more environmentally friendly. After surveying 120,000 establishments throughout the U.S., the BLS determined the average percentage of green jobs within each industry.

Although a survey on this scale has yet to be repeated, estimates for the size of California's green economy in 2010 range from 2.1 percent[1] to 3.4 percent of all jobs.[2] Analysis performed by HR&A Advisors[3] determined that in 2018, green jobs comprised around 4.8 percent of all jobs in California, and predominantly include pollution reduction and recycling industries (see Figure 4.7). In some metropolitan areas, green jobs are expected to grow at least as quickly as overall job growth through 2050, exceeding the projected 1 percent compounded annual growth for all jobs.[4] In Los Angeles County, for example, green jobs are anticipated to grow at an annualized rate between 1.2 and 1.8 percent, as

Figure 4.7 Percentage of Green Jobs in California by Industry Sector



Source: HR&A Advisors' analysis of Emsi data.

1. Mark Muro, Jonathan Rothwell, and Devashree Saha. (July 2011). *Sizing the Clean Economy: A National and Regional Green Jobs Assessment.* The Brookings Institute.
2. State of California Employment Development Department. (October 2010). *California's Green Economy.*
3. HR&A Advisors, Inc. (April 2020). *Green Jobs Report.*
4. Emsi. (2019). Industry characteristics data.

compared to the countywide average of 1.1 percent for all jobs. There is anticipated growth in energy efficiency and renewable energy technology positions, which include occupations accessible without a bachelor's degree (e.g., construction and maintenance occupations) and technical positions (e.g., electrical engineering and software development occupations), which are more likely to require an advanced degree.

As the overall workforce transitions toward a knowledge-based economy, technology, automation, and industry disruption are likely to change the future of work. Some occupations can easily transition to a technology-forward economy, including office and analytical positions, in which remote work could allow workers to relocate and lessen concentrations of regional employment demand; other occupations cannot be completed remotely and are unlikely to change dramatically, including occupations in health care fields. Some low-skill positions are likely to be lost to automation, such as cashiers, telemarketing occupations, and other jobs in retail and agriculture. The loss of these jobs will shift overall workforce demand toward occupations with higher education requirements. This is likely to have cascading impacts throughout California's educational system, as more students may enter the system as adult workers requiring additional education to reenter the knowledge-based economy.

These industries will bring higher-wage opportunities to local residents and create a competitive advantage for the regional economy. Stakeholders are interested in being ahead of this transition and driving growth in emerging industries. In the City of Palm Desert, a "Tech Taskforce" has focused on aligning K-12 education with the community college system, creating a base and pathway for students interested in high-tech fields. Stakeholders in the City of Concord highlighted the regional Contra Costa County Northern Waterfront Economic Development Initiative, which aims to modernize traditional manufacturing industries to focus on clean technologies (i.e., those with minimal environmental impacts), utilizing existing infrastructure and retooling the existing workforce. The future of work will continue to demand higher educational attainment, which is discussed below in the context of the relationship between workforce projections and CSU degree conferral.

4.1.4 WORKFORCE AND DEGREE CONFERRAL PROJECTIONS

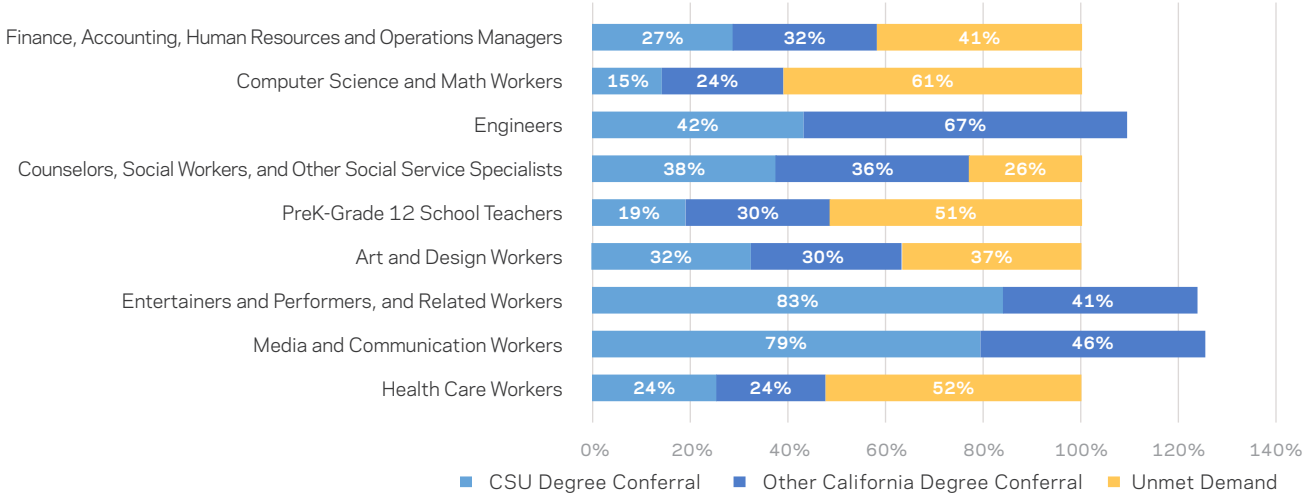
OVERVIEW OF METHODOLOGY AND DATA SOURCES

This Report's analysis of workforce demand relies on State of California Employment Development Department (CalEDD) occupational forecasts through 2026, which forecast industry demand, changes in occupational demand, and total job openings by occupation. Expected job openings in 2026 are considered a function of unmet growth and replacement needs that occur because of individuals' retirement within an occupation. This Report filters CalEDD data to create a set of occupations that the average CSU graduates are qualified to apply for, removing occupations that do not require a bachelor's degree or higher, and those occupations requiring more than five years of experience.

This Report uses CSU degree conferral data on a campus-by-campus basis. The Report's Cluster-level degree conferral projections use historical growth rates from 2014 to 2019, which are applied to historical growth rate of degree conferral by program through 2023; thereafter degree conferral is assumed to grow modestly. The CSU has historically accounted for more than one-third of graduates in all the highest-demand occupations across California, demonstrating the critical value the CSU system provides in educating students to meet key workforce needs.[5]

The top occupational categories, each with approximately 9,000 job openings in 2016, that require a bachelor's degree and fewer than five years of experience, for which most CSU graduates are qualified, are shown in Figure 4.8. In 2016, the CSU produced high

Figure 4.8 Share of Job Openings by Occupation Met by CSU and Other California Institutions of Higher Education (2016)



Source: HR&A Advisors analysis of CalEDD Long-Term Occupational Projections (2016–2026), Integrated Postsecondary Education Data System (IPEDS), Completions component 2018–19 provisional data, and CSU degree conferral data.

5. HR&A Advisors analysis of the Integrated Postsecondary Education Data System (IPEDS) Data on Degree Completion in California.

shares of entertainers and performers, sports and related workers, and media and communication workers (83 and 79 percent of total California occupational demand, see Figure 4.8). Combined with degree conferral from other institutions, graduates in these fields were oversupplied in California. Finance, accounting, human resources, and operations managers had the largest number of unmet openings in 2016 (35,900 jobs or 41 percent), occupations for which a wide range of CSU graduates are qualified. Other occupations with large gaps included computer science and math workers (22,400 jobs or 61 percent in 2016), pre-kindergarten through 12th grade school teachers (15,000 jobs or 51 percent in 2016), and health care workers (12,300 jobs or 52 percent in 2016). These workforce shortages reflect California's rapid economic expansion during the most recent business cycle and the high cost of housing across the state.

These highest-demanded occupations requiring bachelor's degrees or higher are in rapidly growing and high-wage sectors of the economy and will continue to have the highest occupational demand in 2026. Figure 4.9 shows the expected number of degrees granted by the CSU, job openings (occupational demand), and share of occupational demand met by CSU degree conferral in 2026. Finance, accounting, human resources, and operations managers have the highest occupational demand (97,200 jobs, only 30 percent of which are expected to be met by CSU degree conferral). Computer science and math jobs will also be in high demand in 2026 (44,200 jobs, only 19 percent of which are expected to be met by CSU degree conferral). Pre-kindergarten through 12th grade school teachers and health care workers follow (with 31,800 and 27,600 jobs, respectively). The CSU is expected to confer degrees to satisfy nearly all the demand (90 to 95 percent) for entertainers, performers, sports, media, and communication workers, without considering degree conferral from other institutions. California higher education institutions collectively have an opportunity to expand key programs to better meet workforce demand in sectors of the economy with large and consistent annual job openings. This may include engineering degrees that qualify students for a range of occupations across sectors.

This Report finds that projected degree conferral in 2026, based on historical trends, is growing fast enough for the CSU to maintain or improve its share of degrees conferred relative to occupational demand in 2016. Table 4.4 summarizes the projection of 2026 degree conferral and demand, showing that if degree conferral continues to grow at historical rates, then the CSU's ratio would improve for all of the highest-demanded occupations statewide. The majority, 62 percent, of degrees projected to be conferred across the CSU system in 2026 would be in degree programs that qualify students for the highest-demanded occupations.

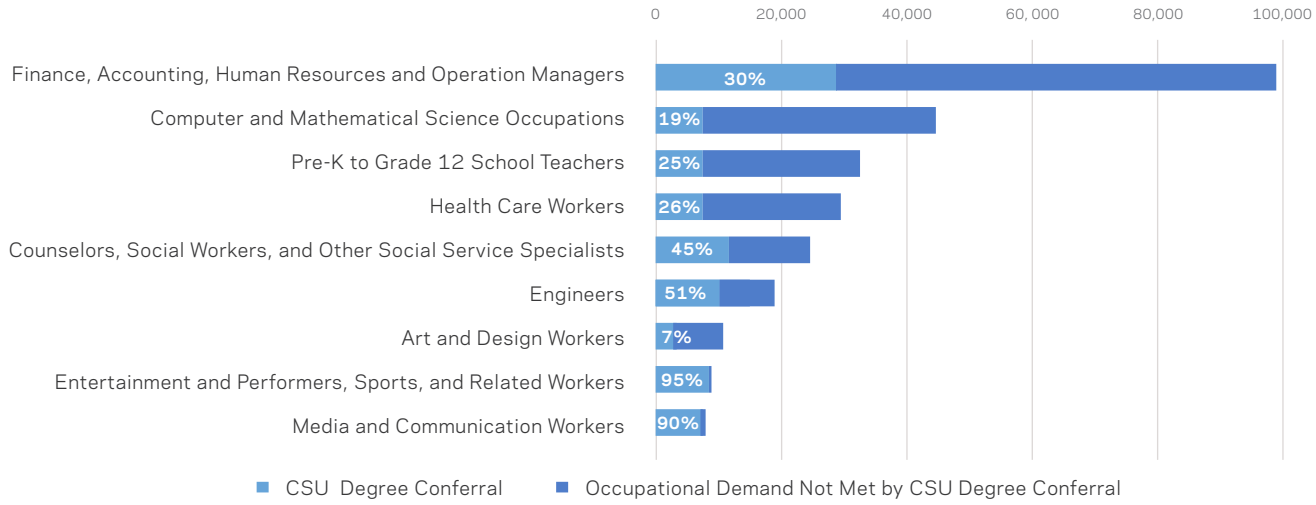
This Report also analyzes the labor market demand and degree conferral relationships in each of the Studied Clusters in Section 4.2, demonstrating meaningful regional variance in both degree conferral and occupational demand. In practice, students may move after graduation to find employment in other Clusters, but for the purposes of this analysis, the relationship between degree conferral and workforce demand is evaluated within Clusters to understand connections with local job markets. This relationship is further detailed in Appendix A.2.

CHALLENGES AND COSTS OF INCREASING DEGREE CONFERRAL

Increasing degree conferral at the CSU is challenging and costly because changing California economic trends, such as the shift towards a knowledge-based economy, require skilled workers in specialized fields for which degrees are costly to deliver. Increasing degree conferral at the CSU will need to adapt to this changing economic future, requiring costly and complex changes to existing academic programs.

The true cost of delivering education is highly variable by discipline, STEM disciplines generally being the costliest, limiting the CSU's

Figure 4.9 High Demand B.A.-Required Occupations in California by Job Openings (2026)



Source: HR&A Advisors' analysis of the State of California Employee Development Department's Long Term Employment Projections (August 2018) and CSU Dgree Conferral Data.

Table 4.4 Statewide 2026 CSU Degree Conferral and Occupational Demand Projections and Estimated Share of Degrees to Demand

Occupation	Projected CSU Degrees Conferred 2026	California Occupational Demand 2026	CSU Share of Degrees Conferred to Occupational Demand 2026	CSU Share of Degrees Conferred to Occupational Demand 2016
Finance, Accounting, Human Resources and Operations Managers	29,100	97,100	30%	27%
Computer Science and Math Workers	8,600	44,200	19%	15%
Engineers	9,200	19,600	47%	42%
Counselors, Social Workers, and Other Social Service Specialists	10,900	24,300	45%	38%
PreK-12 School Teachers	7,900	31,800	25%	19%
Art and Design Workers	4,200	11,500	37%	32%
Entertainers and Performers, Sports and Related Workers	9,400	9,900	95%	83%
Media and Communication Workers	8,600	9,600	90%	79%
Health Care Workers	7,300	28,100	26%	24%
Degrees in High-Demand Occupations	**95,200**			
Total Projected Degrees Conferred	**152,800**			
CSU Share of Degrees in Highly Demanded Occupations	**62%**			

Source: HR&A Advisors analysis of CalEDD Occupational Projections (2016–2026) and CSU degree conferral data.

ability to adapt to the workforce needs and gaps noted above. Construction costs can be high, with lab-intensive buildings costing approximately 20 percent more than a traditional academic building, primarily due to the infrastructure requirements associated with special equipment. Operational costs tend to be more significant and are associated with higher salaries for some disciplines, lower student–faculty ratios, and institutional costs associated with internships. These limit a campus's ability to offer these higher-cost programs, resulting in campuses declaring impaction for disciplines such as computer engineering and nursing, limiting the availability of seats offered and therefore degrees conferred. As an example, each of the 20 campuses offering a nursing program has declared impaction.[6] Funding allocation methodologies and campus-specific per-FTES funding allocations drive degree conferral and alignment with workforce demand due to the higher costs for campuses to provide programs that produce these highly demanded degrees.

As noted above, the state's workforce has shifted toward a knowledge-based economy, and adoption of new technologies and advanced automation will continue to change the future of work. This will include the emergence of new industries and occupations and macroeconomic shifts due to political, human, or other circumstances that have not yet been accounted for by CalEDD's occupational projections.

6. The California State University. (July 2019). 2020–2021 CSU Undergraduate Impacted Programs Matrix. https://www2.calstate.edu/attend/impaction-at-the-csu/Documents/ImpactedProgramsMatrix.pdf

4.2 Academic Program Alignment to Long-Range Workforce Assessment

4.2.1 WORKFORCE DEMAND IMPLICATIONS

WORKFORCE AND ACADEMIC PROGRAM ALIGNMENT WITHIN FOUR CLUSTERS CONTAINING THE FIVE EVALUATED LOCATIONS

This Report also analyzes the labor market and degree conferral relationships for each of the Studied Clusters (Bay Area, Upper Central Valley, Inland Empire, and San Diego) where each of the Five Evaluated Locations are located. Some students may find employment outside the Cluster from which they graduate; however, this analysis evaluates workforce demand within the Clusters to understand connections between the CSU campus and the local job market irrespective of where a CSU graduate was born or graduated from high school. The tables included in this section display occupations in ranked-size order by the total number of projected job openings statewide.

Bay Area Cluster

The Bay Area Cluster is home to two Evaluated Locations: San Mateo County and the City of Concord. Occupational demand within the Bay Area Cluster is exceptionally high and accounts for more than 20 percent of projected occupational demand across the state. In particular, the Bay Area accounts for more than 50 percent of statewide demand for computer and math-related jobs, due to the presence of Silicon Valley. Table 4.5 shows that despite having five CSU and other college and university campuses in the Bay Area, the relative share of projected CSU degrees to demand is still low in every occupational category, demonstrating that graduates from across the state and the United States move to the Bay Area from other regions to help satisfy this demand. The East Bay, Maritime, San Francisco, San José, and Sonoma CSU campuses are located within the Bay Area Cluster. Despite large computer science programs at San José, CSU degrees are projected to fill just 10 percent of projected computer science and math worker demand in 2026, occupations for which all California higher education institutions collectively produced over 40 percent fewer qualified graduates than job openings in 2016.

Upper Central Valley Cluster

The Upper Central Valley Cluster is home to one Evaluated Location: San Joaquin County (Stockton). Demand within the Upper Central Valley Cluster is modest for most occupations, with the exception of preK-12 school teachers, finance, accounting, human resources and operations managers, and health care workers. Table 4.6 shows that Stanislaus, the only CSU campus located within the Upper Central Valley Cluster, confers meaningful shares of degrees that meet most occupational categories, although Stanislaus is projected to produce qualified graduates amounting to less than 15 percent of demand for counselors, social workers, and other social service specialists and health care workers. Note that the data do not account for all certificates granted by Stanislaus that qualify students to be teachers. Just under half, 48 percent, of the projected 3,200 degree holders in 2026 will be qualified for the most highly demanded occupations.

Inland Empire Cluster

One Evaluated Location, the City of Palm Desert, is located within the Inland Empire Cluster. The Inland Empire Cluster is projected to see modest occupational demand in 2026, with the greatest demand for finance, accounting, human resources and operations managers, preK-12 school teachers, and health care workers. Table 4.7 shows that the single campus in the Cluster, San

Table 4.5 Bay Area Cluster Projected Occupational Demand and Degree Conferral (2026)

Occupation	Projected Bay Area Degrees 2026	Bay Area Occupational Demand 2026	Share of Degrees to Occupational Demand 2026	Share of Degrees to Occupational Demand 2016
Finance, Accounting, Human Resources and Operations Managers	5,820	25,530	23%	22%
Computer Science and Math Workers	2,290	22,260	10%	9%
Engineers	1,830	6,730	27%	26%
Counselors, Social Workers, and Other Social Service Specialists	1,640	4,990	33%	30%
PreK-12 School Teachers	1,330	6,140	22%	20%
Art and Design Workers	930	2,970	31%	29%
Entertainers and Performers, Sports and Related Workers	1,700	2,180	78%	75%
Media and Communication Workers	1,510	2,800	54%	44%
Health Care Workers	1,100	5,970	18%	20%
Total Degrees	**27,830**			
Share of Degrees in Highly Demanded Occupations	**65%**			

Sources: HR&A Advisors analysis of CalEDD Long-Term Occupational Projections (2016–2026) and CSU degree conferral data.

Table 4.6 Upper Central Valley Cluster Projected Occupational Demand and Degree Conferral (2026)

Occupation	Projected Upper Central Valley Degrees 2026	Upper Central Valley Occupational Demand 2026	Share of Degrees to Occupational Demand 2026	Share of Degrees to Occupational Demand 2016
Finance, Accounting, Human Resources and Operations Managers	630	1,060	59%	46%
Computer Science and Math Workers	80	190	42%	35%
Counselors, Social Workers, and Other Social Service Specialists	100	800	13%	13%
PreK-12 School Teachers	230	1,320	17%	13%
Art and Design Workers	40	50	80%	51%
Entertainers and Performers, Sports and Related Workers	170	140	121%	112%
Media and Communication Workers	130	80	163%	118%
Health Care Workers	170	1,040	16%	13%
Total Degrees	**3,230**			
Share of Degrees in Highly Demanded Occupations	**48%**			

Sources: HR&A Advisors analysis of CalEDD Long-Term Occupational Projections (2016-2026) and CSU degree conferral data.

Table 4.7 Inland Empire Cluster Projected Occupational Demand and Degree Conferral (2026)

Occupation	Projected Inland Empire Degrees 2026	Inland Empire Occupational Demand 2026	Share of Degrees to Occupational Demand 2026	Share of Degrees to Occupational Demand 2016
Finance, Accounting, Human Resources and Operations Managers	1,380	4,890	28%	25%
Computer Science and Math Workers	410	890	46%	26%
Engineers	-	-		
Counselors, Social Workers, and Other Social Service Specialists	550	1,830	30%	24%
PreK-12 School Teachers	200	3,450	6%	7%
Art and Design Workers	120	360	33%	31%
Entertainers and Performers, Sports and Related Workers	330	530	62%	47%
Media and Communication Workers	350	330	106%	67%
Health Care Workers	130	2,410	5%	7%
Total Degrees	**6,290**			
Share of Degrees in Highly Demanded Occupations	**55%**			

Sources: HR&A Advisors analysis of CalEDD Long-Term Occupational Projections (2016-2026) and CSU degree conferral data.

Bernardino, offers a wide range of programs that equip students for occupations with high demand, with the largest supply of students projected to be qualified for finance, accounting, human resources, and operations managers. However, San Bernardino, which is one of only a few higher education institutions in the Inland Empire Cluster, has academic programs that confer some of the smallest shares of degrees across the Clusters for preK-12 school teachers and health care workers. Expected degree conferral compared to occupational projections anticipates that roughly 5 percent of the future demand for preK-12 school teachers and health care workers would be met by San Bernardino graduates. Overall, 55 percent of degrees in 2026 qualify graduates for highly demanded jobs in the local labor market.

San Diego Cluster

The San Diego Cluster includes the City of Chula Vista, one of the Evaluated Locations. Strong projected occupational demand in the San Diego Cluster offers many opportunities for CSU graduates, with the greatest demand for finance, accounting, human resources and operations managers, computer science and math workers, preK-12 school teachers, and health care workers. Although the two campuses in the San Diego Cluster, San Marcos and San Diego, are projected to have degree conferral increases

Table 4.8 San Diego Cluster Projected Occupational Demand and Degree Conferral (2026)

Occupation	Projected San Diego Degrees 2026	San Diego Occupational Demand 2026	Share of Degrees to Occupational Demand 2026	Share of Degrees to Occupational Demand 2016
Finance, Accounting, Human Resources and Operations Managers	3,090	9,060	34%	29%
Computer Science and Math Workers	780	3,440	23%	19%
Engineers	890	2,370	38%	35%
Counselors, Social Workers, and Other Social Service Specialists	990	1,910	52%	49%
PreK-12 School Teachers	790	2,550	31%	21%
Art and Design Workers	330	780	42%	38%
Entertainers and Performers, Sports and Related Workers	970	560	173%	125%
Media and Communication Workers	950	710	134%	128%
Health Care Workers	1,420	2,250	63%	42%
Total Degrees	**16,390**			
Share of Degrees in Highly Demanded Occupations	**62%**			

Sources: HR&A Advisors analysis of CalEDD Long-Term Occupational Projections (2016–2026) and CSU degree conferral data.

that will outpace occupational demand, they confer relatively small shares of degrees for computer science and math workers and preK-12 school teachers. Table 4.8 shows not only the difference in overall enrollment between San Marcos and San Diego, but also the difference in programmatic degree conferral.

4.2.2 ACADEMIC PROGRAM ALIGNMENT

For each Cluster, the Report considers a myriad of potential mechanisms to address unmet workforce needs, including shifting the academic focus of existing institutions, expanding existing institutions, and adding an additional campus (using one of the four typologies discussed in Section 4.3). For each Evaluated Location, this Report identifies a campus development scenario that best aligns with enrollment demand, workforce need, and community outreach feedback (see Appendix B.1 for more detail). The programmatic (and curricular) mix reflects the additional space, capital, and operational costs required for a campus aligned with future workforce projections, as well as likely requirements for flexibility as workforce needs evolve.

4.3 Campus Typologies

This section includes a brief description and discussion for each of the campus typologies that currently exist or are being considered for each of the Evaluated Locations.

TRADITIONAL CAMPUS

A Traditional Campus delivers all educational instruction from a single geographic location. The campus location provides the full breadth of curricula and academic spaces to support course delivery. In addition, the full spectrum of other campus-related functions, such as (but not limited to) residential life, student recreation and wellness, general administration, library, student union, and central plant and facilities support are all offered at this location, as required to support the curricular and student focus. The physical location of the campus must be on real property owned (in this case) by the State of California.

The CSU has a long history of providing education by utilizing the Traditional Campus typology across the state (see Table 4.9). The campus that is now called San José State is the oldest campus in the system, and like other campuses of its time (Chico, San Diego, and San Francisco), was founded as a Normal School, training elementary school teachers. Since then, the system has continued to expand to 23 main campus locations in order to provide comprehensive educational offerings to satisfy regional demand statewide.

OFF-CAMPUS CENTER

Off-Campus Centers[1] have been the primary mechanism used by the CSU system to address unmet demand for academic degree programs in geographic areas not adequately served by an existing CSU main campus (see Table 4.10). An Off-Campus Center is supported by a main campus and is established when an existing CSU campus either rents or acquires a facility from which it offers academic courses and programs to support regional demand.

Off-Campus Centers are funded through the main campus's annual budget allocation, and enrollment is incorporated into the main campus's multi-year enrollment planning proposal. Any additional costs associated with additional staff, physical plant, and other institutional support expenses are additive, without any savings to the main campus (see Section 6.3). This is particularly problematic for small to medium-sized campuses, due to limited budget availability. Because of this, Off-Campus Centers are more likely to have some or all coursework run through self-support. This is especially true of high-cost programs such as nursing. By moving the programs to self-support, the cost for the student is much higher, which disproportionately and negatively impacts low-income students.

Although guidance on the establishment of an Off-Campus Center is somewhat flexible, the CSU system provides baseline criteria that the main campus must provide "compelling evidence" that the area served by the new Off-Campus Center has "substantial" demand for academic programs that cannot be met by an existing CSU campus or by another public or private institution. The ambiguity of this guidance has resulted in institutions using varying thresholds for the "substantial" metric and a wide variety of approaches to providing "compelling evidence."

Once an Off-Campus Center reaches 200 FTES, the main campus must receive CSU Office of the Chancellor approval to continue to grow in that location. The Office of the Chancellor requires that the location meet the following criteria prior to Board of Trustees review and approval to grow beyond 200 FTES:

Table 4.9 CSU Main Campus Locations

CSU Campus Locations	Year Founded
Bakersfield	1965
Channel Islands	2002
Chico	1887
Dominguez Hills	1960
East Bay	1957
Fresno	1911
Fullerton	1957
Humboldt	1913
Long Beach	1949
Los Angeles	1947
Maritime Academy	1929
Monterey Bay	1994
Northridge	1958
Pomona	1938
Sacramento	1947
San Bernardino	1965
San Diego	1897
San Francisco	1899
San José	1857
San Luis Obispo	1901
San Marcos	1989
Sonoma	1960
Stanislaus	1957

Table 4.10 CSU Off-Campus Center Locations

CSU Off-Campus Centers	Main Campus
Concord	East Bay
Downtown	San Francisco
Stockton	Stanislaus
Antelope Valley	Bakersfield
Irvine	Fullerton
Palm Desert	San Bernardino
Imperial Valley – Brawley	San Diego
Imperial Valley – Calexico	San Diego

1. The California State University Office of the Chancellor. (2000). *Procedures for Establishment of New Off-Campus Centers and Approval of Permanent Off-Campus Centers*. https://calstate.policystat.com/policy/6661902/latest/#attachments

Figure 4.10 Map of Clusters, Evaluated Locations, CSU Main Campuses, and CSU Off-Campus Centers

- Enrollment of at least 200 College Year (CY) FTES, with anticipated growth to 500 CY-FTES in the next five to 10 years.[2]
- Full upper-division programs offered in at least three academic degree programs.
- Assurance that projected center enrollment cannot be otherwise addressed through distance learning technologies or other alternative instructional delivery methods that meet pedagogical requirements.
- Assurance that increased enrollment or offerings at the Off-Campus Center will not have a significant negative impact on established higher education institutions in the region.
- Demonstration that academic resources are sufficient for continuity without negatively impacting the main campus programs.
- Staffing with CSU faculty at a Student-Faculty Ratio (SFR) similar to the main campus.

Further review processes allow the location to continue to grow and potentially become an independent Traditional Campus once other thresholds are met. Recent examples of an Off-Campus Center transitioning in this manner include the Channel Islands and San Marcos CSU campuses.

Off-Campus Centers are limited by their funding model (allocation from the overall principal campus's budget) and their limited curricular offerings. Off-Campus Centers are designed to offer upper-division coursework only. As a result, they have lower Student-Faculty Ratios (SFR) and highly specific course offerings that typically make them more expensive per FTES than the main campus. Because budget allocations per FTES do not vary based on the cost to deliver, an Off-Campus Center can be seen as an economic drain to the main campus. Several factors make these Off-Campus Centers more expensive per FTES:

2. College Year: The summer, fall, winter (if applicable), and spring terms define the college year. For campuses that do not offer a summer term, the academic year calendar and the college year calendar represent the same time interval: fall through spring.

- Upper-division focus: Lower-division courses (due to class size and contact hours associated with them) are delivered at approximately 40 percent of the cost of an upper-division course.
- Part-time students: Fixed costs are higher per FTES for part-time students versus full-time students, and given the limited offerings at Off-Campus Centers, students are more likely to attend part time.
- Size: Off-Campus Centers tend to be small (up to 1,000 FTES), and fixed costs are higher on a per-FTES basis.

The courses delivered at the Off-Campus Center are typically taught by faculty from the main campus. These assignments, due to commute times and limited on-site support services, are more labor intensive in comparison to teaching at the main campus. From a faculty perspective, it can be considered a negative trade-off to teaching assignments on the main campus, since opportunities for scholarship, such as committee assignments, research, and faculty collaboration (all of which are required for advancement), are typically limited on an Off-Campus Center. Some campuses have incentivized faculty to provide instruction at Off-Campus Centers with supplementary pay to address the issue.

These combined factors can result in tension between a main CSU campus and its Off-Campus Center(s). As a result, in times of increased fiscal constraint, the Off-Campus Centers are often either reduced in size or eliminated entirely.

UNIVERSITY CENTER

The CSU does not have a precise policy definition for University Centers, but they are generally understood to be a variation on an Off-Campus Center. A University Center tends to be co-located within another university or institutional setting, most often on a community college or K-12 campus (see Table 4.11). Through a negotiated fair share agreement, an allied main CSU campus delivers content in that location, allowing students to complete four-year degree programs in a single location. Like Off-Campus Centers, University Centers tend to focus on upper-division coursework, but they have more freedom to offer specialized lower-division coursework. However, given their dependency on both a main CSU campus (as content delivery mechanism) and a host campus (for instructional space and student services), these centers rarely have a clear brand identity, and are often temporary and tied to the leadership of both institutions.

Table 4.11 Current CSU University Center Locations

CSU University Centers	Main Campus
Redding	Chico
Garden Grove	Fullerton
Oakland	East Bay
Visalia	Fresno
Downtown Los Angeles	Los Angeles
Riverside County	San Marcos
Georgia	San Diego
Downtown	San Francisco
Rohnert Park	Sonoma

Because budgeting for a University Center is similar to an Off-Campus Center (i.e., allocated from the overall budget of the main campus with a higher attributable cost burden per FTES) and locations are often leased, University Centers are especially transient in nature and susceptible to being eliminated during fiscal downturns. Because of this, they are more likely than other campus typologies to be run through self-support. This approach, while reducing the cost burden to the main campus, disproportionately and negatively impacts low income students due to the higher cost of attendance.

Although University Centers offer potential to provide flexible instruction to meet regional workforce demand, the budgetary model puts pressure on these locations during inevitable cyclical economic downturns. With that said, some key benefits of a University Center model are:

- Limited capital investment is required, as the locations are most often tied to a community college that has either existing underutilized space or the ability to build space through local community bonds.
- They can be deployed quickly based on regional workforce demand with varying funding structures (state side courses or self-support courses).
- The locations generally have existing amenities in place to support faculty and student needs, including dining, recreation, and student success services, which limit the financial operational investment required by the associated main campus.

BRANCH CAMPUS

As with an Off-Campus Center or University Center, a Branch Campus is geographically separate from the allied main institution. Compared to those campus typologies, however, a Branch Campus is more independent, as defined by four primary criteria:

- It is permanent in nature.
- It offers a complete curriculum (including both upper- and lower-division coursework) resulting in a degree, certificate, or other recognized educational credential.
- It has its own faculty and an administrative or supervisory leadership entity.
- It has its own budgetary and hiring authority.

These policy differences can have significant impacts on campus performance and community perception as compared to an Off-Campus Center:

- The permanent nature of the location results in greater opportunity for regional partnerships and an increased likelihood of investment proximate to the Branch Campus.
- A student's ability to complete their entire coursework in a single location results in less financial burden to the student

than having to commute to and from a main campus to finish a degree/certification.

- Branch Campuses tend to have more services and support for student life, including housing, recreation, dining, and student success support services. This has a positive impact on both retention and brand identity.
- Offering both lower-division and upper-division coursework more evenly distributes costs, bringing down the cost per FTES or cost per degree to an amount more comparable to or potentially less than the cost at a principal location (depending on curricular focus).
- Faculty/administration specifically assigned to the location are more readily accessible to students and may not need to commute to or from the main campus to complete scholarship activities.
- Budgetary tracking specific to the location allows the main campus to make more informed decisions relative to both the main and Branch Campuses.

Branch Campuses are relatively common in other state systems, including (but not limited to) Oregon, Arizona, Washington, New York, and Utah, but have not been used within the CSU system. In other locations, however, they have been a primary strategy to address expanding demands, unmet regional need, and strategic investment in underserved communities.

Depending on the regional or main campus need, Branch Campuses may or may not be focused on a certain educational niche. For example, in Arizona, Branch Campuses tend to be geographically close to a main campus (within the same city or county), but with a different curricular focus. This is done to build a sense of community for students and to co-locate faculty who are likely to teach multiple courses within the same discipline. A good example of this is Arizona State University: The Downtown Campus focuses on health care professions, while the Mesa campus is branded as polytechnic. In contrast, the Oregon State model focuses on geographic distribution instead of curricular distribution. The OSU–Cascades Branch Campus benefits from the brand identity of the main campus, despite being in a different geographic location. Regardless of the primary motivation for the Branch Campus, costs of senior administrators (President, Provost, CFO, etc.) and back-of-house functions (such as admissions, registrar, human resources, etc.) are shared, bringing down the overall cost to deliver education.

4.4 Academic Program

This section includes three nuanced academic programs for use in creating development scenarios for the Five Evaluated Locations, capital and operational estimates, and timelines for implementation. The academic programs are generally based on statewide workforce demand, with nuanced versions of Traditional and Branch Campuses for 7,500 FTES and a Traditional Campus for 15,000 FTES. For locations where an Off-Campus Center or University Center were indicated as the most appropriate typology for the location, the systemwide median on an ASF per FTES basis was used to inform costs and spatial requirements in lieu of an academic program. Consistent with state appropriations, this section provides additional detail for academic program at San Joaquin County (Stockton). And finally, the section outlines strategies to develop an Off-Campus Center into a Branch Campus.

4.4.1 ACADEMIC/INSTRUCTIONAL SPACE

All the academic programs use a curricular derivation for academic space needs. This approach results in Colleges offering general education and support courses appearing to have larger enrollment than what one might expect, due to the increased proportional amount of coursework being offered through these Colleges. This is particularly impactful to the Colleges of Arts and Humanities and Science and Mathematics. The academic programs are based on existing system curricular models, system (and other) space type-related standards, and best management practices that inform academic planning, which is discussed further in subsequent paragraphs and in Appendix A.3.

A systemwide analysis was completed to compare assignable square feet (ASF) per FTES as well as a systemwide average and recommended ASF per FTES by disciplinary category. Distributed space types (instructional, faculty offices, research/instructional support) are generally based on the curricular model of the highest-ranked program in that category within the system. Exceptions were made for known anomalies where outside private funding may influence space distribution.

The following narrative includes information about degree conferral, relationship to workforce, assumed ASF per FTES by academic or other instructional support functions, as well as relevant discussion that informed the space planning models. Detailed space assumptions by category, including the summary of ASF per FTES by campus, can be found in Appendix Section A.3.

Arts and Humanities

With a focus on broad liberal arts education, Colleges of Arts and Humanities deliver many (approximately 70 percent) of the General Education requirements on a campus.[1] These are a mix of lower-division and upper-division coursework in the following areas: Area A (Area 1) – English Language Communication and Critical Thinking, Area C (Area 3) – Arts and Humanities, and Area D (Area 4) – Social Sciences (Shared with Education and Behavioral Sciences).

- Typical Degrees Conferred: Bachelor of Arts – Art, Language Studies, English, History, and Philosophy. Some campuses will include pre-credential programs for teacher education in Arts and Humanities. This model includes credential and pre-credential programs in the College of Education, Social and Behavioral Sciences.
- Related Industry/Workforce: Art and Design, Entertainment and Performers, Sports, Media, and Communications.
- ASF/FTES: 90

Business and Economics

Colleges of Business and Economics are generally focused on providing major courses in both lower and upper divisions. There is some modest participation in providing General Education courses, specifically in economics. These Colleges typically have a comparatively high Student–Faculty Ratio (SFR) due to the modality of their instruction, with an SFR of approximately 30, as compared to much lower SFRs in other Colleges, such as science and math (20) and other technical/vocationally-focused Colleges such as engineering and education.

- Typical Degrees Conferred: Bachelor of Arts or Science – Business Administration, Accountancy, Finance, Economics, Information Systems, International Business, Marketing, Real Estate, and other specialized degree programs such as Agricultural Business and Fashion Merchandising, depending on the campus.
- Related Industry/Workforce: Finance, Accounting, Human Resources and Operations Managers, Computer and Mathematical Science Occupations.
- ASF/FTES: 12

Education, Social and Behavioral Sciences

Colleges of Education, Social and Behavioral Science are a mix of highly specific degree programs and general education/breadth courses. General Education courses are primarily in Area D –

Table 4.12 Summary of Space Needs by Campus Development Scenario (Total)

Category	Branch 7,500 FTES (GSF)	Traditional 7,500 FTES (GSF)	Traditional 15,000 FTES (GSF)
Instructional Space	892,000	892,000	2,158,000
Other Campus-Related Functions	1,243,000	1,461,000	2,745,000
Total Instructional	**2,135,000**	**2,353,000**	**4,903,000**

1. The California State University. (n.d.). *General Education Policy*. https://www2.calstate.edu/csu-system/administration/academic-and-student-affairs/academic-programs-innovations-and-faculty-development/faculty-development-and-innovative-pedagogy/Pages/general-education-policy.aspx

Social Sciences, which make up approximately 25 percent of the total courses required. The primary mode of instruction in these courses is "lecture," shifting space allocation to shared instructional classroom space.

The CSU prepares more of California's teachers, pre-school through grade 12, than all other institutions combined. Nearly 8 percent of the nation's teachers graduate from the CSU.[2] The CSU system has a long history of supporting this important part of California's current and future economy.

California generally requires that teacher candidates obtain experience (25 hours) teaching in public schools to qualify for specialist, single-subject, and multi-subject credentials. This requires individual campuses to work actively with local districts to create mutually beneficial opportunities to address this requirement. As such, they often require additional staffing to support unique admissions processes and administration in support of these credentials.

- Typical Degrees Conferred: Bachelor of Arts and Bachelor of Science – Education (with and without specialty), Liberal Arts, Humanities and Social Sciences; Master of Arts – Education, and Doctor of Education (EdD and PhD).
- Related Industry/Workforce: PreK–Grade 12 School Teachers, Counselors, Social Workers, and Other Social Service Specialists.
- ASF/FTES: 10

Engineering and Computer Sciences

Colleges of Engineering and Computer Science are primarily focused on providing major courses in both lower and upper divisions. Growth in these colleges tends to disproportionately impact the College of Science and Mathematics, as it provides approximately 40 percent of the total credits in support of engineering degree programs. Degrees/courses in engineering are notably space intensive and require a lower SFR due to the lab-intensive nature of the instruction.

- Typical Degrees Conferred: Bachelor of Science – Aerospace, Biomedical, Civil, Computer Engineering and Science, Electrical, Environmental, Industrial, Manufacturing, Materials, Mechanical, Software Engineering.
- Related Industry/Workforce: Finance, Accounting, Human Resources and Operations Managers, Computer and Mathematical Science Occupations, Engineers.
- ASF/FTES: 113

Health Care Professions

Colleges of Health Care Professions are primarily focused on providing major courses in both lower and upper divisions. Disciplinary makeup (a policy versus clinical approach, as an example) varies across the systems, including differing approaches to whether degrees are offered on the state side or as self-support courses. This can create confusion for potential students, and disproportionately and negatively impact those students who may be in a region where the relevant program is offered only on the self-support side. Of particular note are the programs in Nursing that are impacted across the system. Due to limitations in operational funding, physical on-campus space, and off-campus partnerships with health care providers for internships, observation, and other practicum experience, available seats are restricted, despite robust demand and workforce need. Barriers exist in each of these categories to facilitate growth in nursing and similar/related programs that could be alleviated through increased capital and operational funding.

- Typical Degrees Conferred: Bachelor of Science – Health Science, Health Care Administration, Public Health, Counseling, Environmental and Occupational Health, Nursing; Master of Sciences – Counseling, Nursing, and Public Health; Doctoral – Nursing and Physical Therapy.
- Related Industry/Workforce: Counseling, Social Workers, and Other Social Service Specialists, and Health Care Workers.
- ASF/FTES: 45

Table 4.13 Summary of Academic and Instructional Space by Campus Development Scenario

Category	Branch 7,500 FTES (GSF)	Traditional 7,500 FTES (GSF)	Traditional 15,000 FTES (GSF)
College of Science and Mathematics	200,000	200,000	459,000
College of Health Care Professions	83,000	83,000	121,000
College of Education, Behavioral and Social Sciences	19,000	19,000	19,000
College of Business and Economics	19,000	19,000	26,000
College of Engineering and Computer Sciences	226,000	226,000	880,000
College of Arts and Humanities	253,000	253,000	486,000
Shared / Interdisciplinary Classrooms	63,000	63,000	125,000
Multimedia Instructional Support	29,000	29,000	42,000
Total Instructional	**892,000**	**892,000**	**2,158,000**

2. The California State University Office of the Chancellor. (2020). *Teacher and Educator Preparation.* https://www2.calstate.edu/impact-of-the-csu/teacher-education

Science and Mathematics

Colleges of Science and Mathematics are both service and major-focused. On campuses with a technical or vocational emphasis, the College of Science and Mathematics provides nearly all the required major support courses for these programs. Additionally, the College of Science and Mathematics provides courses in Area B (Area 2) – Scientific Inquiry and Quantitative Reasoning, which includes approximately 25 percent of all General Education units required for all degree programs offered.

- Typical Degrees Conferred: Bachelor of Sciences – Biology, Biochemistry, Chemistry, Kinesiology, Mathematics and Physics; Master of Sciences – Biology, Biochemistry, Chemistry, Mathematics, and Physics.
- Related Industry/Workforce: Computer Science and Math Workers, Health Care Workers.
- ASF/FTES: 76

4.4.2 OTHER CAMPUS-RELATED FUNCTIONS

Residential Life and Housing

Housing and residential life amenities are currently highly varied on a campus-by-campus basis. The historical focus by most campuses on providing only necessary spaces for commuting students has led to an uneven distribution of available housing across the existing system. For the purposes of future planning, the academic programs assume any future campus would provide housing for approximately 20 percent of its population, which is roughly equal to 100 percent of all freshmen (with a typical regional exemption available), backfilled by transfer students. Given the positive correlation between providing on-campus housing and the related resources that come with it, it would provide a more equitable experience regardless of location.

Student Recreation and Wellness

Student Recreation and Wellness includes functions such as pools, courts, gymnasiums, and other amenities as well as physical and mental health services. While related functionally, funding for recreation centers versus wellness or health centers typically comes from separate sources. However, for the purposes of space planning, these two functions are shown as integrated.

Auditoria and Performance with Exhibition

Auditoria and performance spaces are generally seen as both a community and campus asset. In some cases, these functions are funded by mixed sources, including philanthropy, local communities, and state funding. They are often utilized by multiple stakeholders, with assumptions around sizing being governed by state standards for the use type.

Commons (Library and Student Union)

These functional areas have undergone significant evolution in recent years as access to information has shifted from print media to digital, and expectations around shared technology and improved comprehensive services have increased. Functions that historically resided in Student Unions, such as food service and informal gathering spaces, are now located in libraries. And conversely, functions that were historically located in a library, such as research functions, study space, and other access to shared materials, are being provided in Student Unions. This merging of functions has led to the broader definition of "campus commons." Like other functional categories, it is understood that these functions are likely to be funded both operationally and from capital perspective by separate sources, but for the purposes of capital and operational planning they have been integrated.

General Administration

General Administrative space includes a variety of campus functional areas, including those services that are inward-facing, outward-facing, and back-of-house. Depending on the exact functional area (Deans of Instruction, for example), they may be co-located with those areas that they serve or govern, but they are aggregated in the academic program for cost-estimating purposes.

Central Plant and Facilities Support

This back-of-house function varies widely by campus, based on campus land holdings, on-site infrastructure demands, and curricular focus. Those campuses with a focus on agriculture or natural resource management typically have larger land holdings, requiring additional space for equipment and other uses. Similarly, those campuses that process wastewater or generate energy on site may require increased physical plant to support those needs.

4.4.3 SAN JOAQUIN COUNTY - ACADEMIC PROGRAM

The CSU has had an education presence in Stockton since 1974 at an Off-Campus Center associated with Stanislaus State, in a location approximately 40 miles away at Stockton University Park. Additional detail on the history and current physical location as well as the alignment of space

Table 4.14 Summary of Other Campus-Related Functions by Campus Development Scenario

Category	Branch 7,500 FTES (GSF)	Traditional 7,500 FTES (GSF)	Traditional 15,000 FTES (GSF)
Residential Life / Housing	768,000	768,000	1,537,000
Student Recreation and Wellness	148,000	148,000	258,000
Auditoria / Performance with Exhibition	0	137,000	137,000
Commons (Library and Union)	196,000	196,000	392,000
General Administration	71,000	92,000	181,000
Central Plant and Facilities Support	60,000	120,000	240,000
Total Instructional	**1,243,000**	**1,461,000**	**2,745,000**

Table 4.15 Summary of Degrees by Funding Source

State	Self-Support (Extended Education)
Communication Studies	Criminal Justice (Accelerated)
Criminal Justice	Social Science
History	Nursing (Accelerated)
Liberal Studies	Health Science
Psychology	Executive MBA
Business Administration (Accounting, General, Management/Human Resources)	Social Work (MSW)
Education (MA)	
Public Administration (MPA)	
Doctor of Education (limited)	
Education Credentials (Administrative Services and Multiple Subject)	

needs at University Park can be found in Section 5.5, Evaluated Locations: San Joaquin County (Stockton).

Courses available in this location (due to its typology as an Off-Campus Center) are upper division, requiring students to complete lower division elsewhere, such as at San Joaquin Delta Community College or the Stanislaus State main campus. The following degree programs are offered on the Stockton Campus:

Students are able to receive advising, student services, and faculty support on a limited basis in this physical location. There is modest full-time staff support available in this location, but faculty appointments by discipline are generally shared with the main campus.

Given the nature of funding of Off-Campus Centers (part of the budget of the main campus), the Stockton Off-Campus Center location has been negatively impacted by financial constraints at the Stanislaus State main campus. The current enrollment in this location is limited to only 219 FTES (Fall 2018). As mentioned previously and discussed in further sections (6.3), the financial pressures on a small campus are significant, and the additive costs associated with an Off-Campus Center compound these issues. The following graphic represents the share of total enrollment at the Stockton Off-Campus Center as a percentage of overall Stanislaus State enrollment.

Future

Each of the main campuses, Off-Campus Centers, and University Centers within the system are a unique mix of programmatic offerings utilizing a wide range of modalities for instruction. This can result in a similarly wide range of assumptions around space needs. In the case of Stockton University Park, with its current focus on disciplines typically associated with a College of Business or College of Education, Social and Behavioral Sciences, required ASF per FTES is much less than what would be necessary for more workforce-aligned programs such as Computer Science, Engineering, or Health Care-related.

In later sections of the Report (Section 5.5), three locations are evaluated for an expanded presence in Stockton as a Branch Campus associated with a larger main campus (15,000 FTES or larger). This is intended as a mechanism to expand course offerings and student services to increase enrollment and better align with those programs that better support statewide workforce demand. Given the regional emphasis on vocational alignment, programs more directly related to workforce demand and/or with increased wage potential may be considered more appropriate in this location. For example, the mix of degree offerings currently offered on the Stockton University Park campus have a 10-year median wage potential of approximately $65,361; reformulating the courses offered to allow for degree conferral in statewide workforce-aligned programs such as computer science, engineering, finance, accountancy, and nursing offer a 10-year wage potential of approximately $90,000 or more.4 This reformulation, however, would likely require adjustments to the allocation of space per student, faculty hiring, and student support services as well as increased funding per FTES.

4.4.4 STRATEGIES FOR DEVELOPING AN OFF-CAMPUS CENTER INTO A BRANCH CAMPUS

The following are strategies that can be applied when developing an Off-Campus Center into a Branch Campus. While these strategies can be applied to the development of a generic Off-Campus Center into a Branch Campus, this Report provides specific detail with regard to that development scenario in relation to San Joaquin County (Stockton).

Provide Comprehensive Degree Offerings

A key objective of the CSU is to provide access to education that aligns with local and regional workforce demand while being sensitive to the needs of prospective students. The sociodemographic realities of Stockton-area students make accessing an existing CSU main campus (Stanislaus State or Sacramento State) difficult due to the costs associated with either commuting or living away from home. A pragmatic near-term opportunity for a CSU Stockton Branch Campus would be to offer a more robust combination of comprehensive, in-person and tele-presence, lower- and upper-division courses to reduce or eliminate the need for Stockton-area students to commute to a CSU main campus. This approach would address the place-bound nature of students in this region through comprehensive curricular offerings in close proximity to public transit within a more affordable commute shed.

Additional Student Support Services
To set future students up for success, core student services must be provided on site, as their accessibility is a key factor in their efficacy. Student services deemed critical are Academic Advising, Academic Skills and Tutoring, Basic Needs Initiative, Honors and Scholars Programs, and Financial Aid. The best strategy to ensure student accessibility is to provide these resources, with both physical infrastructure and staff, on site. Future growth, and the corresponding increase in on-site student support requirements, should be considered when planning for these core facilities. The result of investment in these facilities will be a safety net of support services to aid students and provide them with the best opportunity for success.

Leverage Existing General Administration Investment
In order to provide cost-effective facilities for a Branch Campus, the CSU can leverage existing operational capabilities from a nearby existing main campus. Services provided by an existing main campus might include advancement, admissions and outreach, registrar and enrollment management, finance and administration, human resources, personnel, and procurement. Additionally, roles such as campus President and Provost could be provided by an existing main campus. Shared administration with an existing campus will result in both capital and operational cost savings to a potential CSU Stockton Branch Campus. These cost savings could in turn support future growth and allow the CSU to focus investment towards direct student success services tied to four-year graduation rate and career readiness. Given current budgetary schemes, the most fiscally sustainable main campus is likely to be 15,000 FTES or greater in size.

Enable Incremental Solutions for Recreation Center and Student Union Uses
Wellness centers, including both recreation and health centers, are an integral component of most higher education campuses and make considerable contributions to student life. For these reasons, the facilities should be considered part of any program for a CSU Stockton Branch Campus. One cost-effective means of providing fitness facilities is to partner with local organizations such as health care providers, the YMCA, or Delta Community College to provide CSU Stockton students access to their existing or jointly developed facilities.

Student Unions and their associated functions to allow for informal gathering will need to be integrated into future academic space. While typically funded through student fees, an incremental approach could be taken. To accommodate and promote student gathering in the near term, activities such as student collaboration areas, study rooms, and food and beverage offerings should be programmed into building renovations and new construction. These strategies enable a CSU Stockton Branch Campus to provide the students in Stockton access to recreation, fitness, and student union-related uses that are critical to student success and are often seen at other CSU campuses. Additionally, by providing these types of recreation facilities, a CSU Stockton Branch Campus offers equity with other CSU main campuses to promote student success.

Enhance and Increase CSU Prominence and Presence
An important component of any expansion of CSU facilities includes creating a clear campus identity. To achieve this, investment in CSU Stockton facilities must be aligned to provide brand identity that leverages an existing brand associated with academic rigor, permanence, and continued investment. This could be associated with the CSU as a whole and/or the main campus supporting the branch. Investments might include improvements to campus gateways, signage, campus buildings, and facilities to further integrate CSU brand standards and strategic improvements to outdoor space and to improve functionality and flexibility in support of higher education. These investments can articulate commitment on behalf of the system, augment the physical environment, and reinforce the sense of pride in both students and faculty. This sense of pride, and being part of the CSU system, will enhance the student experience at a potential CSU Stockton Branch Campus.

4.5 Future Trends and Generational Learning

The following is a general discussion of trends in postsecondary student expectations for Generation Z (those born between 1995 and 2010) and Generation Alpha (those born between 2010 and 2025). Particular attention is paid to those trends as they impact campus capacity and operational costs—the primary foci of this Report. Now that Generation Z has, in part, made its way through higher education, data are available comparing Generation Z students' learning preferences to those that preceded them (Generation Y). The information most commonly available for Generation Alpha comes from marketing preference studies. While it is difficult to generalize across entire generations, every effort has been made to provide commonalities among each to inform the planning process. Following the description of each generation, there is general discussion related to factors that influence capacity and operational costs.

GENERATION Z (1995-2010)

The world of Generation Z students has been influenced by the internet; they are often referred to as the first generation of digital natives, the Net Generation, or the iGeneration. As of 2020, they make up about one-third of the U.S. population and are the most racially diverse generation to date.[1]

This generation's personality characteristics, learning preferences, and educational motivations have been shaped by several key events and circumstances including, but not limited to, the following:

- **The War on Terror:** the events of September 11, 2001 and the aftereffects, including heightened global security concerns and an unending war on terrorism. This generation has only known a country at war.
- **The Great Recession:** The recession, which officially started at the end of 2007, resulted in an economic crash and subsequent unemployment surge, with long-lasting impacts on the earning potential of the households in which Generation Z students grew up.
- **Racial Diversity:** As with Generation Y, nearly half of the Generation Z population consists of racial and ethnic minorities. However, in the case of Generation Z, they are more likely than prior generations to be American-born.
- **Connectivity:** Whereas prior generations may have had a unique device for each activity (telephone, camera, Walkman/iPod, planner/Blackberry, etc.), Generation Z has experienced a consolidation of devices. With the advent, availability, and ready adoption of a singular digital device, this generation is extraordinarily connected. With technology came access to social media, including Facebook, Instagram, Snapchat, and other platforms competing for the attention of Generation Z. This has had an impact on this generation's attention span, approach to building connection, and demand for support services.[2]
- **Common Core Educational Standards:** Beginning in 2010, California began to replace the 1997 state standards for K-12 education with Common Core State Standards (CCSS). With an uneven rollout of the standards, depending on location, a student likely experienced a mix of delivery models. Common Core emphasizes learning through application and integrated subject matter. The California CCSS represent a substantial shift from the "teach to the test" pedagogy associated with No Child Left Behind legislation that previously dominated the K-12 curriculum. As a result of the CCSS, many students have engaged with content delivered through project-based learning, group interaction, intellectual exploration, and a shift in the role of teacher from instructor to facilitator. These standards have changed what the K-12 classroom looks like and have inspired students with different learning motivations and expectations.

GENERATION ALPHA (2010-2025)

While mapping trends for Generation Alpha is more difficult given the age of its students, a generation's behavior is typically driven by the sociocultural and economic events of the era.

- **Economic Gaps:** Generation Alpha is growing up during a time when the wealth gap continues to expand.
- **Socially Diverse:** This generation is a product of unprecedented diversity across multiple spectrums, including race, ethnicity, income level, and household types (same-sex parents, single parents, unmarried parents, etc.).
- **Technology as an Extension of Self (AI):** Whereas Generation Z was the first generation to have devices integrated into their lives, Alphas are the first to have artificial intelligence (AI) integrated into their everyday experiences. This includes virtual assistants (like Siri), home management systems that respond to use patterns (Nest), and other apps that mine data to craft the digital experience.
- **Common Core and Next-Generation Science Standards:** Whereas Generation Z began to experience Common Core State Standards that focused largely on English and mathematics, Generation Alpha has only experienced the Common Core approach to teaching and learning in all areas of instruction. Generation Alpha students are matriculating through a K-12 experience that has generally provided integrative, application-based standards across all subjects.

GENERATIONAL EXPECTATIONS DRIVING CHANGE

With each generation comes a new set of academic expectations that a university must respond to. Operational pressures, discipline-specific accreditation standards, and student expectations and needs all play a role in driving change. The following key issues are

1. Corey Seemiller and Meghan Grace. (2016). *Generation Z Goes to College.* Jossey-Bass.
2. Jean M. Twenge. (Sept. 2017). Have Smartphones Destroyed a Generation? *The Atlantic. https://www.theatlantic.com/magazine/archive/2017/09/has-the-smartphone-destroyed-a-generation/534198/*

cited as impacting capacity or operational budgets and are further analyzed within the sections below.

- Rethinking the Classroom for Flexibility: Increased Space per FTES
- Reducing Student–Faculty Ratios (SFR)
- Technology Integration
- Servicing the Whole Student
    - Residential Life
    - Student Support Services

RETHINKING THE CLASSROOM FOR FLEXIBILITY INSTEAD OF DENSITY

Similar to the utilization standards discussed in Section 3.4 of this Report, the space standards regulating capital investment are derived from California Postsecondary Education Commission (CPEC) standards[3] dating as far back as 1955.[4] These standards have a myriad of issues, including misalignment with contemporary technological and accessibility/egress standards and failure to address both general and discipline-specific curricular needs. Although the Office of the Chancellor has found ways to be responsive to discipline- or campus-specific needs by requiring analysis in the upfront stages of project funding, campuses are often pressured to maintain some alignment between these standards and what is funded.

The most extreme of these standards is the interdisciplinary classroom standard. At 15 ASF per student station, this standard is not only well below typical recommendations for flexible and active learning (25–30 SF) but also does not account for contemporary accessibility accommodations and fire/life safety standards. The result has been classrooms designed to standards that make active and project-based learning very difficult. The highest occupancy and most "efficient" of these room types, the large lecture hall, was the primary classroom format on older campuses—one that exists on all CSU campuses. The most efficient version of the large lecture hall—a tiered, fixed-seating format—is also the most difficult for integration of active and project-based learning. This classroom type creates a physical separation between the faculty and students and makes navigating and reconfiguring the space a challenge for the faculty. The classroom design also prevents students from forming groups or moving around the space. Once built, these space types are difficult to retrofit and make applying active and applied learning to courses utilizing these spaces difficult.

When hundreds of Common Core high school students were asked what they wanted from their educational experience, they generally seemed to agree: Students wanted classes that were challenging, interactive, hands-on, related to real-world experiences, and that used a "quality over quantity" approach to homework and projects.[5] Although not explicitly stated, these are the underlying principles of active and project-based learning strategies. In theory, this is exactly the type of course the CSU could provide, but in practice this is often inhibited by the physical classroom layouts of existing spaces. The system has 2,937 classroom spaces with a median ASF per station (seat) of 16.1 ASF across the portfolio. Moving towards spaces more conducive to flexible learning pedagogies would decrease the potential capacity in classroom spaces. While the net impact would vary by space and by campus, it is estimated to result in a net decrease of approximately 18,000 seats or 42,000 FTES. However, this decrease in occupancy could potentially be offset by offering online courses for those classes that may be more conducive to this type of modality.

REDUCING STUDENT-FACULTY RATIOS (SFR)

Student-Faculty Ratio (SFR) is a measurement of students enrolled (measured in FTES) per faculty member. Budgetary pressures over the last 20 years to increase SFR have resulted in both increased class sizes and a shift from activity- or lab-based delivery to a lecture delivery mode. In this context, a successful student must be able to learn independently, often without simultaneous or follow-up discussion or application. As Generation Z and Alpha students, who have spent their K-12 academic careers experiencing learning through a different modality, arrive on CSU campuses, friction is inevitable.

In 2015, the CSU launched the Graduation Initiative 2025, its plan to increase graduation rates, eliminate equity gaps in degree completion, and meet California's workforce needs through increasing rates of degree completion. The initiative created opportunities to counter pressures to increase course enrollment capacities and shifted institutional focus to outcome-based assessments, particularly in foundational courses in mathematics and English. With modest increased availability of funding and a shift in focus to graduation rates, SFRs have been reduced on the majority of campuses (see Table 4.16).

As various campuses are asked to address budget shortfalls, there is an inevitable tension between the SFR and graduation rates as the primary performance metric of a successful institution. Large undergraduate courses with high enrollments are the workhorse of many postsecondary institutions. These courses are "efficient," as they are able to provide educational opportunities for large numbers of students at one time. However, they are typically devoid of high-impact educational practices, with content delivered in a monodirectional manner with limited interaction among students and instructor. For a student accustomed to more direct classroom interaction, either with faculty or peers, a shift in instructional delivery can be particularly challenging; it is therefore imperative that campuses consider this issue, particularly as it relates to student success.

To better align with the academic motivations and expectations of Generation Alpha, the reduction of SFRs will need to continue and be more equitably distributed across disciplines and courses.

3. Reference to CPEC table in Appendix A.
4. https://files.eric.ed.gov/fulltext/ED541315.pdf
5. Susan Yonezawa. (2015). Student Voice and the Common Core. *National Society for the Study of Education, 114*(1), 39-58. https://create.ucsd.edu/research/yonezawa_student-voice-and-the-common-core.pdf

Table 4.16 CSU Campus Student–Faculty Ratios

Campus	Student-Faculty Ratio - Fall 12 (SFR)	Student-Faculty Ratio - Fall 18 (SFR)	Student-Faculty Ratio - Recent Trends
Bakersfield	29.13	23.5	-24.0%
Channel Islands	20.47	20.5	-0.1%
Chico	24.43	22.8	-7.1%
Dominguez Hills	27.14	27.2	0.1%
East Bay	26.93	24.2	-11.1%
Fresno	24.38	21.5	-13.5%
Fullerton	24.87	23.5	-5.8%
Humboldt	22.75	21.0	-8.6%
Long Beach	22.44	24.2	7.2%
Los Angeles	22.92	23.1	0.6%
Maritime Academy	15.82	13.9	-13.5%
Monterey Bay	27.14	26.8	-1.2%
Northridge	23.27	24.3	4.2%
Pomona	25.32	24.6	-2.9%
Sacramento	27.13	24.4	-11.4%
San Bernardino	27.33	27.1	-1.0%
San Diego	23.64	25.1	5.7%
San Francisco	23.75	22.3	-6.6%
San José	22.05	25.7	14.2%
San Luis Obispo	20.27	20.9	2.8%
San Marcos	23.73	25.2	5.7%
Sonoma	25.31	22.8	-10.8%
Stanislaus	23.36	21.0	-11.4%

Source: The California State University Office of the Chancellor. (2012 and 2018). Annual Course Section Report by Campus. https://www2.calstate.edu/csu-system/

To ensure student success and increase engagement, the CSU system may need to reevaluate reasonable SFR targets (with budgets to match), lecture-based courses, and the role technology might play in complementing this effort. This may require a shift in hiring practices, tenure expectations, and faculty training.

At the university level, including within the CSU system, coursework is predominantly delivered in a "lecture" mode (see Table 4.17). The lecture delivery method has several specific characteristics, including:

- Lecture class duration is one contact hour per unit for lecture (compared to three for lab).
- The average lecture class size is 20 percent larger than the campus course enrollment average.
- Given limitations related to class size and room configuration, lecture classes are more likely to be traditionally content oriented and teacher centered.

In the traditional teacher-centered pedagogy, the faculty member is active at the front of the room and students are passive listeners. Students are asked to accept and memorize information the instructor curates and presents, with limited direct involvement. Often, course content is uploaded to a learning management system, such as Moodle, Blackboard, or Canvas, which further disconnects the student from direct engagement with the faculty. These factors can reinforce the perception that in-person class attendance has limited value, despite studies that show otherwise.[6] The effectiveness of this traditional lecture format has been called into question by universities, faculty, and students alike, yet it has continued due to physical classroom layouts and budgetary and other constraints.[7]

A traditional lecture course may be unfamiliar to next-generation students; they expect greater interaction with their colleagues and are unlikely to consider the content delivered by the instructor to have greater value than information available from other sources. This shift from faculty-centered to student-centered instruction is emphasized by the Common Core's focus on problem solving, group work, and collaboration. This learning modality is designed to promote self-efficacy, foster collaboration, and provide opportunities for student-directed approaches to learning. Students are also expected to create their own arguments and critique those presented by others, creating an expectation that

6. M. Credé, S. Roch, and U. Kieszczynka. (2010). Class Attendance in College: A Meta-Analytic Review of the Relationship of Class Attendance with Grades and Student Characteristics. *Review of Educational Research, 80*(2), 272-295.
7. G. D. Kuh. (1995). The Other Curriculum: Out-of-Class Experiences Associated with Student Learning and Personal Development. *The Journal of Higher Education, 66*(2), 123-155. https://doi.org/10.2307/2943909

Table 4.17 CSU Campus Lecture Format Analysis

Campus	Percentage of Coursework Delivered as Lecture	Student-Faculty Ratio – Fall 2018 Lecture Format
Bakersfield	90.6%	27.2
Channel Islands	86.6%	24.1
Chico	87.2%	27.6
Dominguez Hills	91.4%	29.9
East Bay	89.3%	28.2
Fresno	87.8%	26.9
Fullerton	89.9%	27.3
Humboldt	81.3%	26.6
Long Beach	85.4%	30.6
Los Angeles	89.1%	27.6
Maritime Academy	86.1%	19.3
Monterey Bay	91.8%	28.6
Northridge	88.3%	28.2
Pomona	90.0%	30.2
Sacramento	90.1%	29.4
San Bernardino	87.8%	32.1
San Diego	89.7%	32.9
San Francisco	90.3%	27.1
San José	86.7%	32.0
San Luis Obispo	83.7%	28.7
San Marcos	94.1%	28.9
Sonoma	90.9%	27.1
Stanislaus	89.4%	24.8

Source: The California State University Office of the Chancellor. (2018). Annual Course Section Report by Campus. https://www2.calstate.edu/csu-system/

students will play an active role in the classroom. In comparison to K-12 classrooms of the past, this type of interdependent learning changes the responsibility of the instructor and tends to equalize the student and teacher in terms of discussion and in-class content creation. The teacher is seen primarily as the connector and facilitator. A student educated in this manner develops habits of mind in which questioning, critical thinking, and analysis are essential parts of knowledge acquisition.

A focus on project-based and active learning requires a commitment to smaller classes and more flexible classroom configurations to support collaboration between faculty and student and peer to peer. Given limited capital investment in renovation of existing buildings within the CSU system, faculty are forced to implement project-based learning despite existing classroom occupancies, fixed seating, and other limiting factors. Because of these disincentives, integration of active, project-based learning is uneven across courses, departments, and campuses, and is driven primarily by individual faculty passion rather than policy directives or strategic investment at the system level.

Two potential impacts to capacity and operational costs resulting in retooling curricula for active and project-based learning would be in space utilization and SFR. While active learning can be applied in nearly all class sizes, it is considered generally more viable in classes with enrollment less than 100. Limiting enrollment or increasing the number of sections required to deliver courses will further decrease SFR and increase the cost to deliver the coursework. Additionally, if courses were moved from a "lecture" mode to discussion, activity, or lab, the associated increase in contact hours would also decrease SFR.

TECHNOLOGY INTEGRATION

Generation Alpha has grown up in a time when technology is integral to daily life. Many Generation Alpha students were handed tablets on their first day of kindergarten and are comfortable moving from one platform to another as their learning needs change. They have been encouraged to seek knowledge from digital sources and see no difference between information gathered from a physical source, a digital source, or their teachers.

Their digital experience is often a curated one, where algorithms embedded in the site or the device itself provide content of highest relevance to the viewer. While this is done to monetize the moments spent online, the result is a digital consumer who is used to having the body of knowledge curated for them, with little or no participation on their part.

The Common Core student has been trained to seek depth of knowledge through self-directed research and inquisition and then to apply the newfound information to real-world, practical applications. Online learning formats are used as a complement to in-person instruction, and class time is used for application and discussion. At the university level, using a combination of in-person and synchronous learning to complement asynchronous material can lead to an educational experience that values retention of information and skill acquisition while honoring individual learning styles. This modality split requires investment in learning management systems and content creation in advance of a course being delivered.

Additionally, students no longer use technology merely as a source of information, but also to create their own content and collaborate with others. More than a reflection of being technically savvy, this reflects a shift in values away from traditional, hierarchical learning structures. Students feel that they should be regularly queried about their preferred method of learning and that faculty should respond to that feedback dynamically.[8] This expectation of extreme reciprocity shifts faculty roles. While historically faculty were hired based on their subject matter expertise, this may no longer be of the highest priority. Although technical competency is certainly valuable, the ability to respond to evolving learning expectations

8. Ivo Arnold. (2011). John Hattie: Visible Learning: A Synthesis of Over 800 Meta-Analyses Relating to Achievement. International Review of Education, 57, 219. https://doi.org/10.1007/s11159-011-9198-8

and a focus on teaching methodology with technology integration may take precedence in future hiring decisions.

Until the Spring of 2020, only 4 percent of CSU enrollment was in online courses, and this number had held relatively steady for years. While there had been a steady drumbeat of dire predictions about online providers causing higher education disruption, ultimately that had not come to fruition. Student and faculty preferences for face-to-face instruction had limited any real investment of time, training, or money into this method of delivering coursework. While it is not uncommon for a student to take an online course to fill gaps or augment their coursework, it was not seen as a primary delivery mode. Similarly, courses were being augmented with digital content creation, but that content was generally not seen as primary. As such, the impact to capacity was limited. While some systems have continued to invest in online education—Arizona State University – ASU Online is of particular note—the CSU has focused on in-person course delivery. With the events associated with Spring 2020 and the subsequent terms to follow, the CSU will be forced to move more fully into online course delivery.

SERVICING THE WHOLE STUDENT

Whereas in the past students were expected to be college-ready before they came to campus, the student-centered approach to learning calls for campuses to be student ready. Most future CSU students will have taken courses outside of their official school to meet academic requirements for graduation and college entry. With that has come a shifted expectation of what a "school's" primary function might be. Rather than as content providers, universities are seen as content and course aggregators and as service providers with a focus on the learning experience, the whole student,[9] and the opportunity for intellectual and social engagement among students. Despite dire predictions and rumors of disruption caused by online learning, the demand for an on-campus experience to achieve an accredited bachelor's degree remains high.

While students value the college degrees they seek as a means to an end (i.e., a job), they also value their time spent enrolled for other reasons. Demand for services that typically fall within the categories of student support and student affairs has increased exponentially, with continued growth expected on the horizon. Some key examples include:

- **Residential Life:** The CSU has historically focused on acting as a system of regional universities, with the understanding that students would live at home and their campus would only be responsible for delivering coursework. As expectations have shifted, campuses are being asked to solve broader societal issues, including providing affordable on-campus housing for diverse student populations. This, along with the other benefits to retention and graduation rates, has campuses across the system revisiting assumptions around housing. This has large space and potentially budgetary impacts. At approximately 500 GSF per housed student, this is both a significant capital and land investment. Additionally, while previous models have focused on delivering market-competitive housing, a new focus on providing on-campus housing options at below market rate may impact other areas of campus budgets.
- **Mental Health and Wellbeing:** Demand for physical and mental health services is at an all-time high and continues to grow exponentially. Many reasons are cited for this, including the dependence on technology and students arriving at campuses with underdeveloped skills to manage stress and the responsibilities of adult life. Regardless of the reason, demand for on-campus services is high and growing. This has both space and operational impacts. Historically these services were funded through student fees, which were more likely to be approved by more affluent student populations. This has created an uneven distribution of services across the system.
- **Recreation:** In an attempt to compete in the marketplace, private and public institutions have been building state-of-the-art on-campus recreational amenities. In order to develop these facilities, students vote through referendum to self-tax. Those institutions serving less affluent students are less likely to vote for these additional fees, creating inequities in the campus experience, potentially impacting application rates and other efforts to redistribute enrollment.
- **Academic Support Services:** Students have an expectation that they will receive concierge academic and financial support services from their campus. First-generation students and students from less affluent origin districts may require additional services to achieve increased levels of success, such as advising, mentoring, and tutoring. Additionally, students from affluent origin districts come in with high service expectations based on the assistances they were provided growing up (subject matter tutors, academic/college counselors, career advisors, etc.). In all cases, these are space-intensive uses that are not easily folded into existing office spaces. Additionally, some students may require specialized or wraparound services unique to a particular population. For example, Pell-qualified students, underrepresented minorities, and veterans all have unique needs that are addressed in physically separate locations due to privacy concerns and the unique needs of these populations.

9. A "whole student" refers to a university's consideration for a student's intellectual capacity and achievement, emotional makeup, physical condition, social relationships, vocational aptitudes and skills, moral and religious values, economic resources, and aesthetic appreciations.

4.6 Workforce Demand, Academic Program, and Campus Typologies Conclusions

WORKFORCE DEMAND ASSESSMENT

California has seen significant wage growth over the last 20 years, but the economic strength of the Studied Clusters varies widely, with the fastest wage growth in the Bay Area Cluster and the slowest growth in the Inland Empire and Upper Central Valley Clusters of the Evaluated Locations. Other indicators of economic growth, such as industry diversity and job growth, follow similar trends. Regional industry concentrations reinforce the wage growth disparity, as highly skilled and higher-wage industries co-locate with employee talent and economic growth opportunities. Workforce trends in San Joaquin County are generally consistent with those of the Upper Central Valley Cluster, with slower wage growth than the state as a whole and a relatively non-diversified economic base and small share of workforce in occupations requiring a bachelor's degree or higher.

This Report finds that the projected number of degrees conferred by the CSU by 2026, based on historical trends, will grow fast enough for the CSU to maintain or improve its share of degrees conferred relative to occupational demand in 2016. In 2026, if Cluster-level conferral continues to grow at the historical rate, this Report projects that the CSU will confer 62 percent of all degrees in degree programs aligned with the highest-demanded occupations. Generally, the CSU is expected to confer enough degrees to satisfy nearly all statewide and regional demand (90 to 95 percent) for Entertainers, Performers, Sports, Media, and Communication Workers, without considering degree conferral from other institutions. However, the CSU will confer smaller shares of degrees associated with Finance, Accounting, Human Resources, Operations Managers, Computer Science, and Math Specialists, which have the highest total occupational demand in 2026. California higher education institutions collectively have an opportunity to expand key programs to better meet workforce demand in sectors of the economy with large and consistent annual job openings.

ACADEMIC PROGRAM ALIGNMENT TO LONG-RANGE WORKFORCE ASSESSMENT

Occupational demand in the Bay Area Cluster (including San Mateo County and the City of Concord) is exceptionally high, accounting for more than 20 percent of projected occupational demand across the state, and an even higher share of Computer and Math-Related jobs. Occupational demand in both the Upper Central Valley (including San Joaquin County) and Inland Empire (including the City of Palm Desert) Clusters is projected to be modest, with some demand for Prek-12 School Teachers, Finance, Accounting, Human Resources and Operations Managers, and Health Care Occupations. Although occupational demand is modest in the Upper Central Valley and Inland Empire Clusters, these Clusters have few higher education institutions to fulfill the demand that does exist. Whereas, occupational demand in the San Diego Cluster (including the City of Chula Vista) is strong, and degree conferral from the San Diego and San Marcos campuses is expected to outpace regional occupational demand.

CAMPUS TYPOLOGIES

This Report reviews four potential campus typologies—Traditional Campus, Off-Campus Center, University Center, Branch Campus—to support future enrollment demand in the CSU. The CSU has a long history of implementing Traditional Campuses (23), Off-Campus Centers (8), and University Centers (9), but the Branch Campus would be a new typology. For each of the Evaluated Locations, the Report offers information regarding which campus typology appears to best align with stakeholder expectations, enrollment demand, and funding availability.

ACADEMIC PROGRAM

For the purposes of reviewing land availability, capital budgeting, and operational budgets, three non-site-specific campus programs were developed. The programs, for the purposes of the Report, were developed with two versions of a 7,500 FTES campus—Traditional Campus and Branch Campus—and a single version of a 15,000 FTES Traditional Campus. In the case where a University Center was identified, the median systemwide ASF per FTES was used to calculate space needs. In all cases, the programs are non-site-specific but generated based on contemporary curricular models to support workforce-responsive degree conferral identified in other sections of the Report.

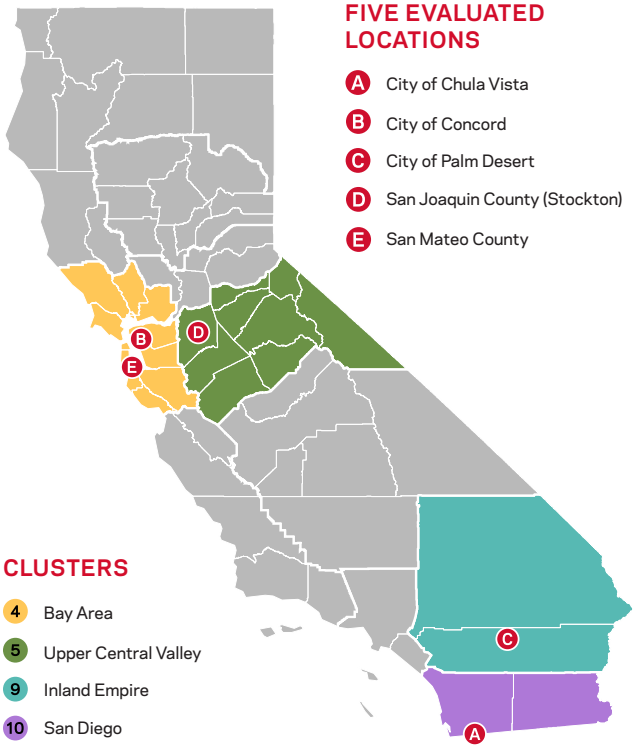
FUTURE TRENDS AND GENERATIONAL LEARNING

To date, Generation Z has increased pressure on universities to meet its needs both spatially and operationally. Early indications are that these trends will continue. Some areas of impact will include increases in ASF per FTES for improved flexibility in instructional space and reduced Student-Faculty Ratios, which will increase both capital and operational costs. Additionally, campuses that seek to improve retention and graduation rates will see additional cost pressures to increase staff in areas of advising, tutoring, financial aid, and counseling. Those services that have historically been funded through other means such as residential life may require revisiting to improve equity and availability across the system. This in turn may further tax operational budgets already stretched thin.

5.0 Evaluated Locations

This Report analyzes seven sites within the Evaluated Locations: Chula Vista University and Innovation District (San Diego Cluster), Concord Reuse Project Campus District (Bay Area Cluster), CSUSB Palm Desert Campus (Inland Empire), San Mateo County CCD – Cañada College (Bay Area Cluster), and three sites in San Joaquin County (Upper Central Valley Cluster): Stockton University Park, San Joaquin County Fairground, and Stockton Education and Enterprise Zone. These sites were identified through the outreach sessions at each location, and for both San Mateo County and San Joaquin County (Stockton), a GIS land availability study (see Appendix B.5) was additionally conducted to identify other potential sites. Section 5 outlines and evaluates criteria as described in 5.1.2 and is organized into three main categories—sociodemographic/industry, academic, and physical/community—for a potential new campus at the Evaluated Locations. First, this section presents the campus development scenarios that were evaluated for this Report and the methodology utilized for each evaluation criterion. The section then presents each location's and site's criteria evaluation. The criteria evaluation extrapolates from analysis described in Sections 3 and 4 of this Report, supplemented by additional analyses specific to individual sites, surrounding regions, and campus development scenarios. Stakeholder input was gathered at each Evaluated Location, providing information about location-specific issues and regional characteristics, informing the Report. The evaluation of implementation considerations for the new campuses is provided in Section 6.

Figure 5.1 Map of Evaluated Locations



5.1 Evaluation Approach

5.1.1 EVALUATED CAMPUS DEVELOPMENT SCENARIOS

This Report outlines five campus development scenarios based on campus typologies described in Section 4.3 (and Appendix A.7) of the Report, but only four (Traditional Campus at 7,500 and 15,000 FTES, Branch Campus at 7,500 FTES, and University Center at 500 FTES) are included as evaluated campus scenarios across the Evaluated Locations. As noted in Section 3, enrollment demand for the Clusters containing Evaluated Locations is not projected to exceed Planned Capacity by 2035 for existing CSU campuses. However, this Report evaluates potential development scenarios if the State Legislature were to allocate funding to satisfy enrollment demand (in excess of Current Capacity at existing CSU campuses) for a new or expanded campus. In the case of Traditional and Branch Campus development scenarios, the CSU must own the land, whereas University Centers and Off-Campus Centers can occupy leased space or utilize ground leases. In all cases, this Report evaluates two sizes for a Traditional Campus—at 7,500 FTES the campus would be considered a smaller campus and at 15,000 FTES the campus would be a medium-sized campus as compared to the existing 23 CSU campuses. Historically, growth for new campuses to reach 7,500 FTES is incremental over time (and may take 15+ years). These sizes are evaluated to represent the growth goal for a new campus that will allow for operational and academic efficiencies. Initial campus implementation timelines to the first day of classes (based on the evaluated campus development scenario for the sites) are outlined in Section 6, but these do not provide a further timeline of growth beyond the first day of classes for either the 7,500 FTES or 15,000 FTES sizes.

5.1.2 EVALUATION METHODOLOGY

This Report assesses each of the seven sites at the Evaluated Locations against a set of objective criteria related to sociodemographic and industry needs, academic program alignment and workforce demand opportunities, and physical and community context. These criteria are intended to inform decision making and act as a framework for prioritizing investment based on specific objectives, including ability to serve underrepresented populations, enrollment demand, workforce demand, partnerships with institutions and industry, land availability, physical infrastructure, accessibility, housing availability, nearby amenities, and environmental sustainability. This Report employs a specific methodology to determine whether the Evaluated Locations are in greater alignment, partial alignment, or lesser alignment with each criterion. Accordingly, the Report assigns graphic "Harvey balls" to indicate greater (solid), partial (half full), or lesser (empty) alignment with each criterion.

Criterion alignment is based on the analytic methodologies described below. For sociodemographic or other characteristics that can be compared to the State of California as a whole, criterion alignment is evaluated against median values for the

Table 5.1 Campus Development Scenarios at Evaluated Locations

Evaluated Locations	Sites	Campus Development Scenarios
City of Chula Vista	Chula Vista University and Innovation District	Branch Campus at 7,500 FTES
		Traditional Campus at 7,500 FTES
		Traditional Campus at 15,000 FTES
City of Concord	Concord Reuse Project Campus District	University Center at 500 FTES
		Branch Campus at 7,500 FTES
City of Palm Desert	CSUSB Palm Desert Campus	Branch Campus at 7,500 FTES
		Traditional Campus at 7,500 FTES
		Traditional Campus at 15,000 FTES
San Joaquin County (Stockton)	Stockton University Park	Branch Campus at 7,500 FTES
		Traditional Campus at 7,500 FTES
		Traditional Campus at 15,000 FTES
	San Joaquin County Fairground	Traditional Campus at 7,500 FTES
		Traditional Campus at 15,000 FTES
	Stockton Education and Enterprise Zone	Traditional Campus at 7,500 FTES
		Traditional Campus at 15,000 FTES
San Mateo County	CCD – Cañada College	University Center at 500 FTES

state. As an example, full alignment with the ability to serve first-generation students within a Cluster indicates that the percentage of the population with an associate's degree or higher is greater than 20 percent below the statewide median. Partial alignment indicates that the percentage is within 20 percent above or below the state median, and minimal alignment indicates that the percentage is greater than 20 percent above the statewide median. Other criteria for which comparative data were not available use relevant thresholds, as described below.

This Report evaluation includes feedback from Evaluated Location stakeholders, who expressed interest in varying campus development scenarios as well as analysis of the physical proximity of nearby CSU campuses, academic program alignment with workforce demand and stakeholder interests, and practical considerations related to brand identity and associated enrollment demand.

REGIONAL ENROLLMENT DEMAND

This Report evaluates enrollment demand projected through 2035 to determine whether existing CSU campuses within each Cluster have sufficient Master Plan Ceiling capacity to accommodate that demand. Greater alignment indicates growing enrollment demand within the Cluster containing the Evaluated Location, irrespective of alignment with Planned Capacity. None of the Evaluated Locations is located in a Cluster where enrollment demand exceeds Planned Capacity at existing CSU campuses.

SOCIODEMOGRAPHIC CONTEXT

To contextualize the relative sociodemographic needs of the populations that could be immediately served by the Evaluated Locations, this Report utilizes three metrics that are indicators of access to opportunity and that demonstrate where investment by the State of California in the CSU system could begin to reverse historical inequities. For each of these metrics, the Report evaluates the characteristics of the areas accessible to the potential new CSU campus within a 45-minute drive.[1] This Report recognizes that many of the populations focused on in these criteria—underrepresented minorities and those with lower incomes—may not have cars or the means to pay for fuel. And, as noted below, many areas are lacking in public transit. Therefore, access within a 45-minute drive commute may require that, absent of public transit, the CSU provide transportation to and from the Evaluated Location on a frequent basis for these students.

Ability to Serve First-Generation Students

This Report evaluates the share of potential first-generation students living within a 45-minute drive of each Evaluated Location. The percentage share of the 2019 population without an associate's degree or higher is used as a proxy for potential first-generation higher education students and is representative of young people with parents who did not attend or complete college.

Greater alignment indicates a lower percentage of higher education degree-holders and a higher number of potential first-generation students. Lesser alignment indicates a higher percentage of higher education degree-holders and a lower number of potential first-generation students.

Ability to Serve Underrepresented Minorities

This Report also evaluates the share of underrepresented minorities (defined by the CSU as African Americans, American Indians/Alaska Natives, and Hispanic/Latinx) living within a 45-minute drive of each Evaluated Location.[2]

1. Esri ArcGIS Business Analyst (Version 8.1). (2019). American Community Survey socioeconomic profiles. 45-minute drive toward the site on a typical Monday at 8:30 a.m.
2. The California State University. (October 2019). Diversity Style Guide. Underrepresented refers to racial and ethnic populations that are represented at disproportionately low levels in higher education, and who have historically comprised a minority of the U.S. population.

Greater alignment indicates a higher share of 2019 underrepresented minorities as a percentage of overall population living within a 45-minute drive. Lesser alignment indicates a lower share of 2019 underrepresented minorities as a percentage of overall population living within a 45-minute drive.

Ability to Serve Lower-Income Backgrounds
This Report evaluates median income for households living within a 45-minute drive of each Evaluated Location. Greater alignment indicates lower 2019 median income for households living within a 45-minute drive. Lesser alignment indicates higher 2019 median income for households living within a 45-minute drive.

REGIONAL WORKFORCE AND INDUSTRY NEEDS

This Report similarly evaluates workforce needs within individual Clusters in terms of future demand for occupations requiring a bachelor's degree or higher (discussed in Section 4) as compared to projected degree conferral by existing CSU campuses in order to identify workforce gaps that a new campus could serve. Because the CSU system is just one of many higher education institutions within the state, this Report does not anticipate that any individual CSU campus would meet all occupational demands within a Cluster; rather, this Report compares the proportional distribution of degree conferral to the distribution of occupational demand.

Greater criteria alignment for the Evaluated Locations indicates larger workforce needs as compared to degree conferral at existing CSU campuses.

PARTNERSHIPS WITH AND IMPACTS ON INTERRELATED INSTITUTIONS

For each of the Evaluated Locations, stakeholders were engaged to provide qualitative and quantitative feedback on the institutional ecosystem of the area. K-12 leadership, community college representatives, and private, nonprofit representatives were highly participatory and provided relevant information to describe the nuances of the community. Information gathered during the sessions included but was not limited to:

- **K-12:** initiatives impacting graduation rates, A-G completion, SAT completion, and FAFSA completion; existing barriers to higher education and cultural circumstances influencing student mobility for higher education choice; existing or planned partnerships with existing community college districts to address dual enrollment or technical career paths.
- **Community College:** initiatives associated with the community college that might substantially impact its enrollment and/or CSU/UC transfer rates; enrollment trends and their underlying causes; existing partnerships with CSU/UC campuses or private institutions; existing or projected programs associated with the local "California College Promise" that might substantially impact enrollment, matriculation, or transfer rates.
- **Private Colleges and Universities:** enrollment trends and their underlying causes; institutional challenges and strategies to address them; existing partnerships impacting local workforce needs; qualitative understanding of regional student needs and potential mobility.

Independently of the stakeholder meetings, Presidents of specific CSU campuses within a Cluster or in a proximate Cluster were interviewed to provide context for the enrollment demand analysis and for high-level opportunities and threats analysis of the region they serve.

Greater alignment indicates opportunities for partnerships with interrelated institutions and relatively modest or non-existent negative impacts to existing institutions.

PARTNERSHIPS WITH LOCAL INDUSTRY

During the development of this Report, stakeholders in all of the Evaluated Locations noted the potential for synergies that a CSU would provide with local industry, ranging from collaboration on the development of various academic programs and internship opportunities to limited amounts of direct funding for potential future academic programs and/or facilities. Specific details on these types of partnerships were not available at the time of Report production and are unlikely to be finalized until potential action by the State Legislature and recruitment of senior campus executives.

All Evaluated Locations are assumed to have partial criteria alignment, as there is the potential for partnerships with local industry across all sites.

LAND AVAILABILITY

This Report studies the developable land area within designated site boundaries utilizing a variety of sources, including publicly available ArcGIS shapefiles (from city, county, or federal sources), incoming site Master Plans and/or EIR studies, and Google Earth aerial imagery. Each of the sites within the Five Evaluated Locations has a different contextual condition, ranging from greenfield to built-up urban to brownfield site. Each will require a different level of master planning and site work related to accommodating a new CSU development scenario. The following existing site conditions eliminated land area from consideration:

- **Topography:** Slopes steeper than 20 percent were eliminated from the potentially developable site land area.
- **Streams:** A 100-foot development buffer was established around open stream beds, eliminating them from future redevelopment. Underground streams and streams in culverts were not buffered, but were not marked as developable.
- **Large tree stands, arboretums, or orchards:** Natural areas that form an integral part of a campus's identity, academic program, or site landscape were not considered for redevelopment.
- **Agricultural research fields:** Land areas used as agricultural laboratories or student instructional facilities were not considered for redevelopment.

- **Established landscape buffers:** As critical components of a site's or campus's storm water infrastructure, these land areas were eliminated from consideration for redevelopment.
- **Existing roads, paths, and sidewalks:** As part of an existing site or campus circulatory system, these public rights of way were eliminated from consideration for redevelopment.

The following site conditions were indicated on the maps in this section as potentially warranting further study, if redevelopment above the CSU-approved Master Plan is deemed necessary:

- **Existing or master planned surface parking lots:** Large areas of surface parking have tremendous value as potential redevelopment sites for academic program growth and expansion.
- **Other underutilized areas:** Large areas of residual open space were tagged as potential sites for future development opportunities.

Greater criteria alignment for an Evaluated Location indicates that the site has enough available and unencumbered land to develop the Report-selected campus development scenario (a University Center or a 7,500 FTES or 15,000 FTES Branch or Traditional Campus) per site, depending on whether a low-density or moderate-density growth development scenario was selected for the site. In all cases, stakeholders indicated that land or facilities could be made available for free, or at a heavily discounted cost.

PHYSICAL INFRASTRUCTURE AVAILABILITY

This Report evaluates the soils and seismic conditions, highway and roadway access, and power, water, waste, and energy infrastructure available or planned at each Evaluated Location. Physical infrastructure availability studies utilized information from Environmental Impact Reports, Master Plan documents, feasibility studies, state and local government agency publications, and campus Climate Action Reports or Sustainability Reports to determine alignment with the specific physical infrastructure criteria evaluated.

Minimally aligned sites have significant soil and seismic issues requiring mitigation, significant transportation infrastructure deficiencies, and no existing utilities infrastructure without a development plan. Partially aligned sites have little to no significant soil and seismic issues requiring mitigation, transportation deficiencies with planned transportation improvements, and insufficient or no existing utilities infrastructure with a development plan. Fully aligned sites have no significant soil and seismic issues requiring mitigation, sufficient transportation infrastructure, and significant existing utilities infrastructure.

CAMPUS ACCESS AND SURROUNDING DENSITY

This Report evaluates campus accessibility in terms of total population under the age of 25 served within a 45-minute drive toward each of the Evaluated Locations at peak rush hour. Although access via public transportation is crucial for many populations without access to a car, this Report finds that most Evaluated Locations were poorly served by current transit, with modest investment underway or planned.[3] As such, greater criteria alignment indicates a larger residential population under the age of 25 living within a 45-minute drive of each Evaluated Location. Where public transportation (either existing or planned) occurs, it is indicated for the sites.

HOUSING AFFORDABILITY

This Report evaluates housing affordability within individual Clusters, as lack of available and affordable housing is a barrier to accessing higher education. Roughly 11 percent of CSU students reported being homeless (i.e., without a fixed, regular, or adequate nighttime residence), with higher proportions in more expensive urban areas.[4] This Report uses the California Association of Realtors Q4 2019 Housing Affordability Index as a proxy for rental housing affordability, which considers the relationship between median household incomes and housing costs.

Greater alignment indicates greater housing affordability in the county containing the Evaluated Location.[5]

ACCESS TO COMMUNITY SERVICES AND AMENITIES

This Report uses Walk Score as a simplified metric to measure access to community services and amenities, as it measures the walking routes of any address to its nearby amenities. Points are awarded based on the distance and number of amenities in each category (restaurants, cafés, bars, groceries, parks, schools, shopping, entertainment, and errands), nearby population density, and street metrics such as block length and intersection density. Sources for this information include Google, Factual, Great Schools, Open Street Map, and the US Census. Ranked on a scale of 0 (meaning the site is very car dependent and all trips require a car) to 100 (meaning that daily activities and errands can be accomplished within a reasonable distance on foot), Walk Score data have been used by leading researchers in the fields of urban planning, real estate, and public health to quantify the benefits of a walkable built environment.

Greater alignment indicates a site with a higher Walk Score.

ENVIRONMENTAL SUSTAINABILITY

This Report uses three key indicators of long-term environmental sustainability success:

- The condition, climate, and resilience factors of a target site lend themselves to resource conservation and adaptation.

3. HR&A Advisors, Inc. Transit commute times based on existing public transit systems.
4. R. M. Crutchfield and J. Maguire. (2018). *California State University Office of the Chancellor Study of Student Basic Needs.* https://www2.calstate.edu/impact-of-the-csu/student-success/basic-needs-initiative/Documents/BasicNeedsStudy_phaseII_withAccessibilityComments.pdf
5. California Realtors Association. (Q4 2019). *Housing Affordability Index.* Housing Affordability Index is the percentage of households with incomes greater than or equal to the minimum income required to qualify for a loan on the median-priced home.

- Infrastructure in place, or planning for infrastructural development, demonstrates a proactive approach to address energy and environmental management.
- The campus's means of operation and maintenance and its engagement with the community demonstrate commitment to advancing carbon neutrality and climate resilience goals as well as preparing students to be stewards of the natural and built environment.

A Multi Criteria Analysis (MCA) was established to identify the relative importance of project criteria and objectives and to score them using quantitative and qualitative metrics. The ranking system utilizes a weighted score across the triple bottom line (TBL), denoted collectively as the triple bottom line multi-criteria analysis (TBL-MCA). The broad criteria identified by this Report are further divided into sub-criteria, with scoring methodology or definitions of compliance. See Appendix B.2 for scoring of each Evaluated Location.

Greater overall criteria alignment indicates higher scores in the TBL-MCA.

In its 2014 Sustainability Policy, the CSU set a goal to reduce its greenhouse gas (GHG) emissions to 1990 levels by 2020. While reporting that it had already met this goal in 2018, Capital Planning, Design and Construction also noted that pollution related to transportation—which remains the single largest source of GHG emissions in California[6]—was difficult to address, both because transportation sits at the "intersection of sustainability, equity, and affordability" and because individuals' choices about transit are "outside of the direct control of the campuses."[7] However, while existing campuses cannot easily change their relationship with transit infrastructure, in locating a new campus, the walkability and sustainability of transportation means and methods (measured by factors such as proximity to public transit, amenities within walking distance, connectivity of bike paths, etc.) should be a contributing evaluation factor. For each Evaluated Location, transit and traffic mitigation aspects of the potential development are included within the Physical Infrastructure Availability, Transportation criteria subheading and access (as a factor of population serviced by transit and within a commute radius) is included in the Campus Access and Surrounding Area Density criteria subheading.

REGULATORY AND ENVIRONMENTAL BARRIERS

Key regulatory and environmental barriers for entitlements and CEQA clearance were identified by analyzing each of the Evaluated Locations based on the following criteria: existing entitlements and environmental clearance, needed entitlements and environmental clearance, potential CEQA exemptions, previously identified environmental impacts, potential for mitigation, CEQA processing time, and other relevant issues.

The California Environmental Quality Act (CEQA) requires certain types of development projects within the State of California to undergo a thorough review of the project's potential environmental impact. This process may take several years in the delivery schedule for a large project. The CSU is typically the public agency that has the primary responsibility for carrying out CEQA analysis of and approving its own projects. In this arrangement, for CEQA analysis, the CSU is referred to as the "lead agency." CSU development can also occur via private-public partnerships, in which case another public agency (typically the City or County in which the development is proposed) may serve as the lead agency.

The CSU uses campus Master Planning as a strategy to streamline future projects, including streamlining of environmental review. Once CSU Master Plans are "environmentally cleared," the CSU determines whether development is consistent with the CSU Master Plan and may proceed without further environmental review. The CSU or another lead agency may choose to develop new Master Plans in order to streamline future development. A CSU campus development can also be streamlined by using compatible environmental clearances that already exist.

In the evaluation of the locations, greater alignment is achieved if the anticipated CEQA review process is likely to be easier or quicker relative to the other Evaluated Locations.

IMPLEMENTATION CONSIDERATIONS

This Report provides the analysis of the capital funding needs, operational funding needs, and timeline of implementation for all sites, which is included in Section 6 of this Report.

FORMAT OF EVALUATION

Each of the remaining subsections in Section 5 focuses on one identified site and provides a comprehensive evaluation of that site as outlined by the criteria described above. Then, additional environmental sustainability analysis is provided to highlight key considerations in the following areas: site ecosystem and climate, energy and carbon, water, green building, zero waste, sustainable food systems, and resilience and climate action planning. Each section concludes with a series of supporting exhibits that illustrate the information summarized: Site maps highlight available land area without significant documented and potentially prohibitive features for future development. Two associated summary tables are provided: one for site conditions and one to describe the existing and proposed site or campus density, land acreage, and campus development scenario. If the site already includes CSU facilities, the CSU master planned program is also included. The methodology behind these maps, data, and tables are contained in Appendix B.4 Site Criteria for Land Capacity Evaluation.

6. Tony Barboza. (12 August 2019). California's Planet-Warming Emissions Declined in 2017, Even as Its Biggest Pollution Source Keeps Rising. *Los Angeles Times*. https://www.latimes.com/california/story/2019-08-12/california-greenhouse-gas-emissions-fell
7. The California State University Capital Planning, Design and Construction. (February 2018). *Sustainability in the California State University: The First Assessment of the 2014 Sustainability Policy (2014-2017)*. https://www2.calstate.edu/impact-of-the-csu/sustainability/Documents/2014-17-Sustainability.pdf

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5.2 City of Chula Vista University and Innovation District

5.2.1 CAMPUS DEVELOPMENT SCENARIO

Stakeholders indicated a strong preference for a Traditional Campus or Branch Campus at the University and Innovation District, potentially co-located with another institution based on the Master Plan development proposal. A Traditional Campus or Branch Campus would provide both lower- and upper-division courses, whereas Off-Campus Centers are historically only upper division and a University Center typically offers a more focused curriculum. San Diego State University, the closest CSU campus to Chula Vista, is in the process of a planned expansion to create a Mission Valley Campus, which will add capacity to the San Diego Cluster. The University Center and Off-Campus Center typologies, which do not include campus housing and do not offer full lower- and upper-division course offerings, are not as well suited to meeting the goals identified during the Chula Vista engagement sessions. As such, this Report utilizes the Traditional Campus and Branch Campus development scenarios for further evaluation.

5.2.2 CRITERIA EVALUATION

SOCIOECONOMIC / INDUSTRY

Regional Enrollment Demand	◐
Ability to Serve First-Generation Students	◐
Ability to Serve Underrepresented Minorities	◐
Ability to Serve Lower-Income Populations	◐
Regional Workforce / Industry Need	●

REGIONAL ENROLLMENT DEMAND

Enrollment demand within the San Diego Cluster is expected to grow by approximately 5,700 FTES by 2035 to 51,000 FTES (see Table 3.3 in Section 3). As in other Clusters, this is largely driven by growth in A-G completion, as the number of high school graduates is projected to decline by approximately 5 percent over the projection period. Community college enrollment, with the exception of San Diego Miramar College, is projected to decline or remain stable. Nevertheless, the San Diego Cluster campuses' combined Planned Capacity of 60,000 FTES exceeds total enrollment demand (not including San Diego State's Imperial Valley campus with 766 FTES in Fall 2018), indicating that future growth can be accommodated at existing campuses.

ABILITY TO SERVE FIRST-GENERATION STUDENTS

The residential population within a 45-minute drive of the Chula Vista University and Innovation District falls above the state average in terms of educational attainment (48 percent of the population hold an associate's degree or higher, compared to the state average of 42 percent), indicating a smaller share of potential first-generation students in the City of Chula Vista than the state average.[1]

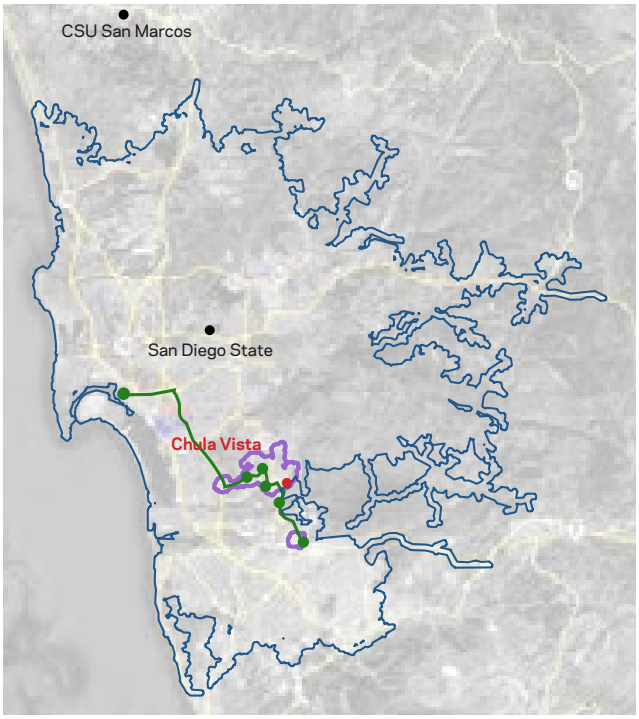
ABILITY TO SERVE UNDERREPRESENTED MINORITIES

The residential population within a 45-minute drive of the Chula Vista University and Innovation District falls slightly below the statewide average in its share of historically underrepresented minorities (31 percent, compared to the statewide share of 33 percent).[2] However, stakeholders in Chula Vista emphasized that the binational U.S.–Mexico regional economy, wherein workers regularly cross the border to or from homes and jobs in and near Tijuana, plays a large role in the racial, ethnic, and cultural composition of the San Diego region.

ABILITY TO SERVE LOWER-INCOME POPULATIONS

The residential population within a 45-minute drive of the Chula Vista University and Innovation District falls above the state median household income ($77,600, compared to the state median income of $74,500), indicating a smaller share of lower-income potential students in the City of Chula Vista compared to the state average.[3]

Figure 5.2 Chula Vista Commute Shed Map



Source: Esri ArcGIS Business Analyst (Version 8.1). (2019). 45-minute drive toward the site on a typical Monday at 8:30am. HR&A Advisors, Inc. transit shed analysis of existing public transportation systems.

1. Esri ArcGIS Business Analyst (Version 8.1). (2019). American Community Survey socioeconomic profiles. 45-minute drive toward the site on a typical Monday at 8:30 a.m.
2. Esri ArcGIS Business Analyst (Version 8.1). (2019). American Community Survey socioeconomic profiles. 45-minute drive toward the site on a typical Monday at 8:30 a.m.
3. Esri ArcGIS Business Analyst (Version 8.1). (2019). American Community Survey socioeconomic profiles. 45-minute drive toward the site on a typical Monday at 8:30 a.m.

Figure 5.3 Chula Vista University and Innovation District Site Aerial

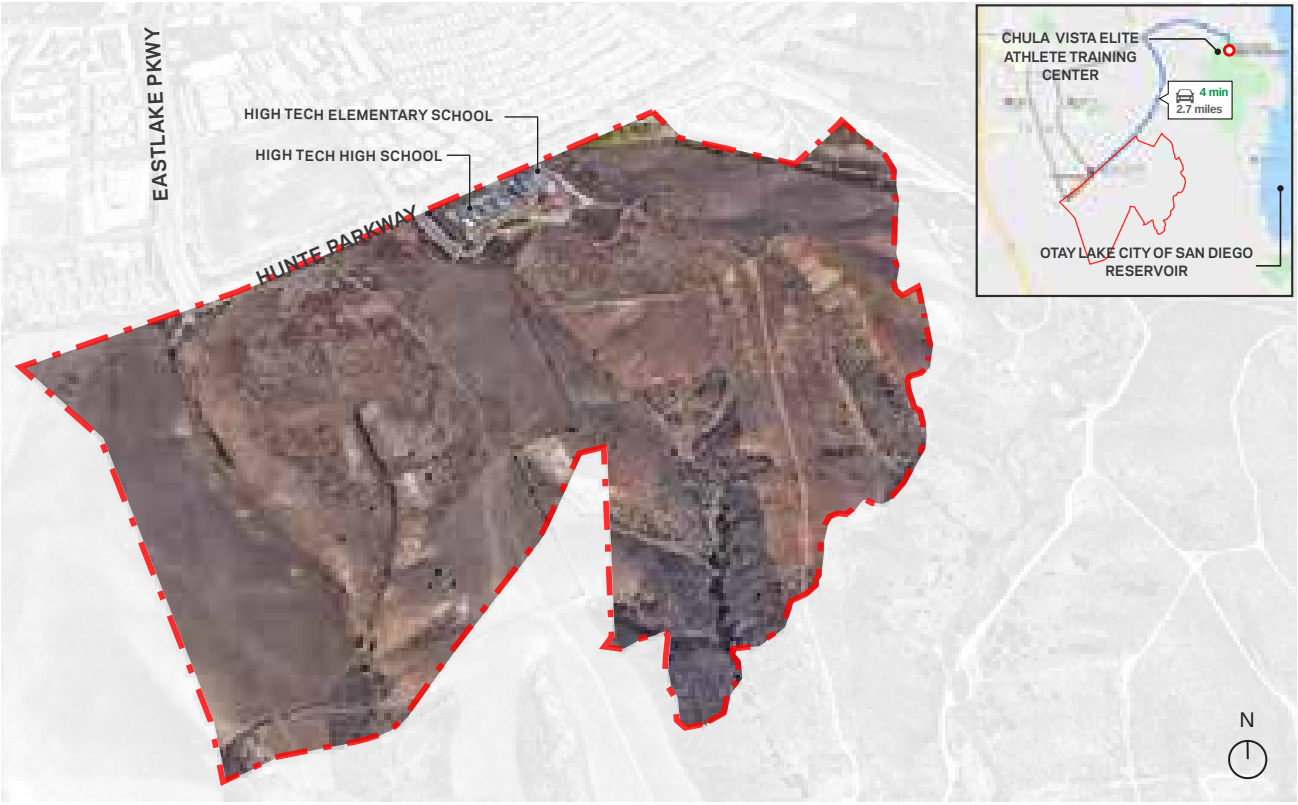


Table 5.2 Chula Vista Region – Higher Education Institutions

Institution	Location	Type	Enrollment (FTES)
San Diego State University	San Diego	CSU	31,221
California State University San Marcos	San Marcos	CSU	12,273
University of California, San Diego	San Diego	UC	32,906
Southwestern College	Chula Vista	Community College	18,716
San Diego City College	San Diego	Community College	14,323
San Diego Mesa College	San Diego	Community College	24,208
Grossmont College	El Cajon	Community College	18,159
Cuyamaca College	El Cajon	Community College	8,049
Point Loma Nazarene University	San Diego	Private	3,480

REGIONAL WORKFORCE/INDUSTRY NEED

The San Diego Cluster is expected to see strong occupational demand in 2026, with projected supply gaps for computer science, schoolteachers, engineers, and finance-related occupations. Degree conferral varies between the CSU campuses in the San Diego Cluster: In particular, San Marcos provides substantially more health care workers than San Diego, while San Diego confers degrees that meet more than 10 percent of occupational demand in the San Diego Cluster for key occupational categories (see Table 4.8 in Section 4).

ACADEMIC

Partnerships with and Impacts on Interrelated Insitutions	◐
Alignment with Local Industry	◐

PARTNERSHIPS WITH AND IMPACTS ON INTERRELATED INSTITUTIONS

Chula Vista is located in the San Diego Cluster. The Cluster is served by three public options for bachelor's degrees: San Diego State University, California State University San Marcos, and the University of California, San Diego. Table 5.2 includes a snapshot of the current higher education ecosystem of the region. Both San Diego State and UC San Diego are impacted, with acceptance rates of approximately 34 percent, and stakeholders do not consider these schools to be options for Chula Vista residents because of it. CSU San Marcos is considered more readily accessible, with an acceptance rate of 62 percent, but it is nearly 40 miles north and is not considered a viable commute alternative for Chula Vista residents. Southwestern College, a community college with five locations across San Diego, is engaged actively with local K-12 districts to improve transfer rates through career

technical pathways, adult education, English-language programs, and other dual enrollment programs.

Unique to this location is its proximity to Mexico and the Cross Border Xpress. Stakeholders often referred to themselves as being part of a super region that includes Tijuana, and some of those participating in the engagement meeting were amongst the many who commute through the Cross Border Xpress daily. Unlike other Evaluated Locations, Chula Vista also noted partnership potential with an international university, Centro de Enseñanza Técnica y Superior (CETYS).

The primary limitations cited by local stakeholders as far as mobility related to attendance at other proximate CSU campuses are socioeconomic and cultural. Stakeholders valued the brand identity of San Diego State University as well as the degree offerings as they relate to potential local workforce needs, and generally considered a Branch Campus model as an acceptable alternative. Of primary concern were the location's proximity to transit, breadth of degree offerings relative to workforce demand, and ties to the unique cultural circumstances of the location.

Like many private schools, Point Loma Nazarene University has seen declining enrollment in recent years. It has taken a unique entrepreneurial approach to addressing this decline by providing distributed degree offerings on or proximate to community college campuses and reducing costs to enrolled students. A public option similarly located or within Chula Vista would likely have a further negative impact on its enrollment. There is also some uneasiness that expanded offerings in this area would have a negative impact on enrollment at CSU San Marcos.

ALIGNMENT WITH LOCAL INDUSTRY

Stakeholders noted that the San Diego area has a history of philanthropy, and City of Chula Vista leaders discussed several nascent partnerships with industry for the University and Innovation District. The developer of the community surrounding the University and Innovation District has committed to support for infrastructure development, although stakeholders did not note any specific industry partnerships or industry funding commitments currently anticipated for a new higher education campus.

PHYSICAL / COMMUNITY

Land Availability	●
Physical Infrastructure Availability	◐
Campus Access and Surrounding Area Density	◐
Housing Availability	◐
Access to Community Services and Amenities	◐
Environmental Sustainability	◐
Regulatory and Environmental Barriers	●

LAND AVAILABILITY

The Chula Vista University and Innovation District consists of 375 acres. Twenty-nine of these acres are designated as "T3: Campus Commons," and 26 acres are designated as "T2: Campus Vistas" in the Master Plan. Of this, 10 acres of land have already been built out as the High Tech K-12 school. This brings the net total area available for potential CSU use to 45 acres. In addition, the Master Plan allows for up to 21 acres of "Flex Overlay" to be allocated for potential CSU or other higher education use, for a total of 66 acres of the site master planned for potential CSU or other higher education use. The Master Plan developer indicated during the community outreach meetings that they would be willing to reorganize the site plan to place these 66 acres adjacent to each other if the CSU desired.

The potential campus site is in the City of Chula Vista's University and Innovation District, intended for a transit-oriented and high-density university with a mix of land uses. The "T-3: Campus Commons" parcels were meant to provide a campus-like setting for a university environment, but the maximum FAR on these parcels is 1.3, which is nearly double the density of CSU's densest campuses to date (both San José and San Francisco are in the 0.68–0.69 FAR range). The maximum development allowed for a new campus within the T-3 parcels is 1,642,400 GSF.

The "T-2: Campus Vistas" parcels were meant to provide a campus-like setting for a university environment in one of the lowest intensity areas on the site, creating a transition to the open space beyond the site. The maximum FAR on these parcels is 0.5, which is similar to CSU's moderate-density campuses. The maximum development allowed for a new campus within the T-2 parcels is 575,600 GSF.

At these higher densities, the proposed university development on the site is only 135,000 GSF short of the proposed academic program for Occupied Facilities for a 7,500 FTES Traditional or Branch Campus (see Appendix A.7), two of this Report's campus development scenarios. However, this Report utilizes the HOK tool to determine campus density scenarios, as described in the methodology section Appendix A.7, and proposes development at a moderate campus density. Utilizing this tool, a moderate-density, 7,500 FTES campus development scenario requires approximately 70 acres. Therefore, the site is approximately 4 acres short of land allocated on site for higher education use. If wishing to grow further, the Master Plan would need to be amended to allocate 64 more acres of the site to potential university use, up to the 130 acres required for a moderate-density 15,000 FTES campus development scenario.

Two campus program elements are folded into this additional land acreage need—housing and recreation. For recreation, stakeholders indicated the option for the CSU to co-locate with the city-owned Chula Vista Elite Athlete Training Center, formerly the Olympic Training Center, which they have indicated could be used for campus athletics and academic programming. For housing, stakeholders indicated that HomeFed Corporation controls the property around the University and Innovation District as master developer and could potentially develop student housing and market-rate housing to support the campus. Using these potential public-private partnership strategies, there could be enough land and existing facilities available to support a new campus development on this site.

Chula Vista University and Innovation District

SAN DIEGO CLUSTER

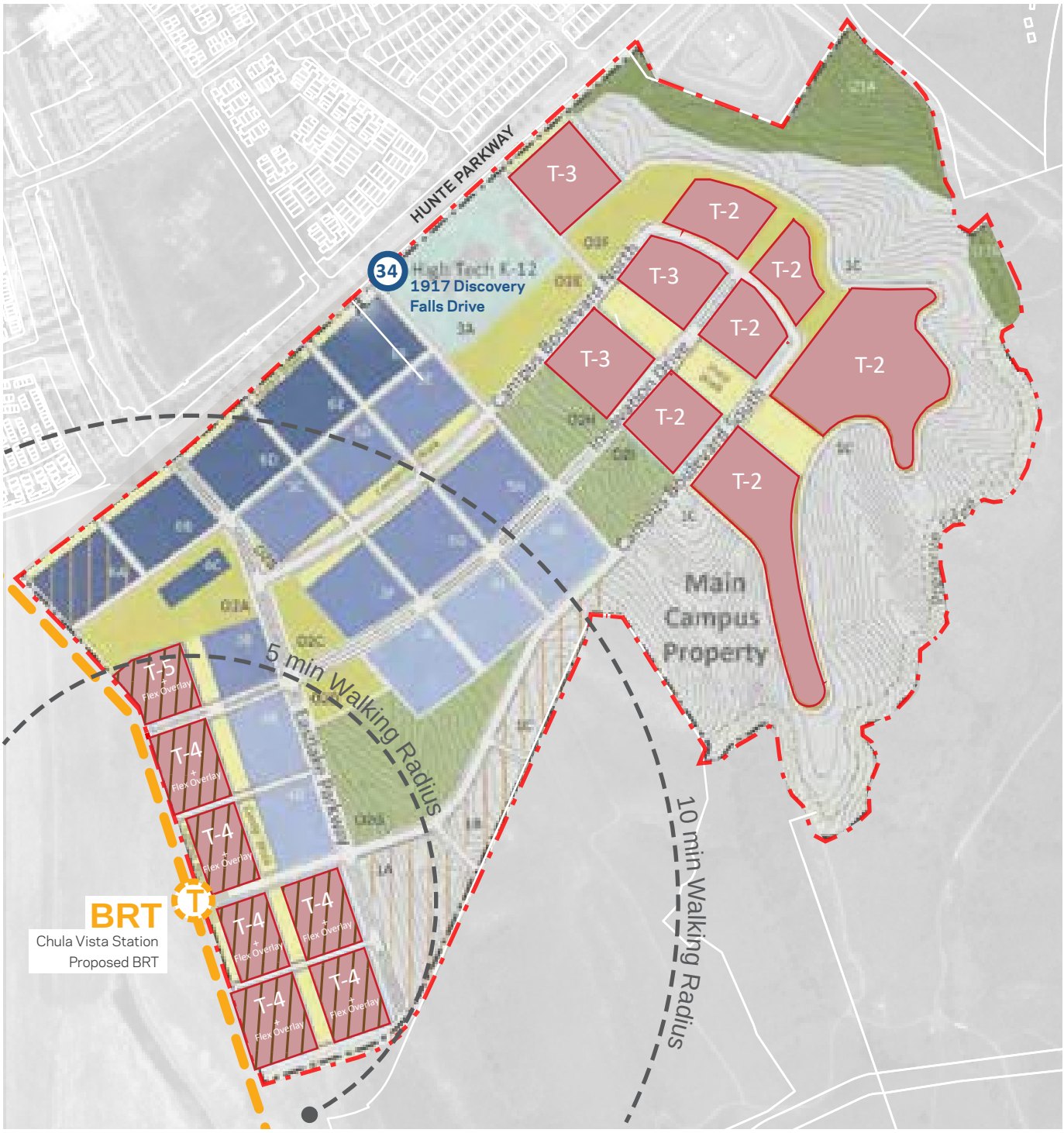


Figure 5.4 Chula Vista University and Innovation District – Site Area Evaluation Plan

Table 5.3 Chula Vista University and Innovation District Site Summary

Site Summary Table	
Land Area for Campus Development Scenarios	7,500 FTES Traditional Campus = 70 acres
	15,000 FTES Traditional Campus = 130 acres
	7,500 FTES Branch = 70 acres
Cluster	San Diego
Existing Campus Density	Low Density
Proposed Campus Density	Moderate Density
Existing Site Land Area	375 acres
Site Area for University Use	**66 acres**
Total Designated Land Area for University Use	45
Steep Slopes (over 20%) or Other Significant Conditions	0
Potential Additional Area for University Use / Flex Zone	21
Land Area Shortage for Campus Development Scenarios	7,500 FTES Traditional Campus = **4 acres**
	15,000 FTES Traditional Campus = **64 acres**
	7,500 FTES Branch = **4 acres**
Implementation / Pre-Construction Status (EIR/ no EIR)	University and Innovation District SPA Plan Project Final EIR

Source: HELIX Environmental Planning, Inc. (August 2018). University and Innovation District SPA Plan Project Final Environmental Impact Report, 3.6-3.8.

Table 5.4 Chula Vista University and Innovation District Site Elements

Site Elements	Condition	Potentially Significant	Source
Land capacity criteria			
Steep slopes > 20%	Above 20%	Yes	University and Innovation District Area Plan
Streams	None	No	CA Department of Fish & Wildlife
High-tension power lines	None	-	CA Energy Commission
Easements	Data Not Available	-	-
Large tree stands, arboretums or orchards	None	-	-
Agricultural research fields	None	-	-
Physical resiliency criteria			
Earthquake zones of required investigation			CA Department of Conservation
Landslides	-	No	
Liquefaction	-	No	
Fault lines	-	No	
Probabilistic ground shaking > 40%	Below 40%	No	CA Department of Conservation
Designated agricultural land	Grazing Land, Local Importance	No	CA Department of Conservation
Local access to agricultural resources > 2 miles	None	Yes	Local Harvest
Flood zones	Zone 'X'	No	FEMA
Fire risk zones	Elevated	Yes	California Public Utilities Commission

PHYSICAL INFRASTRUCTURE AVAILABILITY

This site is currently a greenfield, with no existing infrastructure.

Soil/Geotechnical

Site development for Chula Vista will require significant clearing, grading, and cut and fill earthwork. The Chula Vista Innovation District Sectional Planning Area Plan from November 2018 includes a grading concept and balanced cut and fill of approximately 13,537,000 cubic yards of material. Based on the EIR,[4] the potential for seismic-related ground shaking is considered a significant condition. Slope instabilities and/or landslides resulting from grading activities, soil erosion and topsoil loss associated with construction and operation, and potential soil expansion were all considered to be potentially significant conditions on the site.

Transportation

The Chula Vista site's western edge is along a recently completed bus rapid transit route that is part of the $139 million investment in South Bay Rapid, which will now provide the University and Innovation District with transit service.[5]

This new route connects the campus to Chula Vista's urban core and San Diego's downtown. There are some planned roadway improvements within the Master Plan. Transportation impacts are mitigated to less than significant in the Final EIR for the University and Innovation District; however, the City could require additional environmental review that could trigger mitigations for unforeseen project-level transportation impacts. The EIR assumes roadway improvements will be provided by other Otay Ranch developments, but if they are not provided by other projects, developments that move forward under the existing EIR would be required to complete these improvements. Overall, in comparison to other sites, it is expected that the cost, effort, and time associated with transportation mitigations to accommodate CSU expansion will be low to moderate at this site, depending on transportation improvements provided by other developments.

Infrastructure Systems

The Chula Vista University and Innovation District (UID) will require power, water, recycled water, and wastewater infrastructure to support development of the site. Based on the EIR,[6] the City will be required to secure or construct additional wastewater treatment capacity to support the UID. If it is determined that the UID project will contribute to the deficiency in the capacity of the sewer system, the project applicant will pay its fair share of fees to increase the capacity to an adequate size.

In addition to civil infrastructure requirements, the UID Plan recommends construction of a high-performance central energy facility with heat recovery systems and thermal energy storage tanks to serve the campus through a new hydronic distribution network. The UID also recommends on-site energy generation through large-scale solar, co-generation, or biomass systems to support campus zero net energy (ZNE) goals, while the San Diego Gas and Electric Utility delivered 43 percent of its energy from renewable sources in 2018, according to the California Energy Commission.[7]

CAMPUS ACCESS AND SURROUNDING AREA DENSITY

The Chula Vista University and Innovation District is accessible to 731,000 people under age 25 within a 45-minute drive, at peak commute times, and only 21,000 people under age 25 within a 45-minute commute by public transit, accounting for approximately 34 and 2 percent of the overall San Diego Cluster population, respectively.[8] Although the accessible population within a 45-minute drive is meaningful, it is also reflective of the site's location at the extreme southeastern corner of the developed areas of the San Diego region. The South Bay Rapid Bus Service recently extended service from downtown through Chula Vista and to the Otay Mesa border crossing.[9] This transit extension will likely expand access to new populations not captured in this Report.

HOUSING AVAILABILITY AND AFFORDABILITY

Average San Diego County housing costs are approximately aligned with statewide averages, although they vary dramatically by community.[10] Chula Vista, and particularly the Otay Ranch area where the University and Innovation District is located, is largely composed of single-family homes; the area immediately surrounding the University and Innovation District is planned to include some lower- to medium-density multifamily housing.

ACCESS TO COMMUNITY SERVICES AND AMENITIES

The Chula Vista University and Innovation District site has an existing Walk Score of 34, meaning that most errands require a car. Its Transit Score is 27, meaning there are few nearby public transportation options, and its Bike Score of 32 reveals that the site has minimal bicycling infrastructure today. These results are based on the currently possible 20-minute walk from the site's entry at approximately 1945 Discovery Falls Drive into the surrounding neighborhoods, which contain a moderate number of dining establishments, grocery stores, everyday errand and shopping opportunities, and a very limited number of cultural and entertainment venues and publicly accessible parks.

Based on the Master Plan, once developed, the Chula Vista University and Innovation District site will significantly improve its Walk Score through the benefits of a master planned, walkable built environment.

4. HELIX Environmental Planning, Inc. (August 2018). *University and Innovation District SPA Plan Project Final Environmental Impact Report, 1-59-1-60, 5.8*
5. Keep San Diego Moving TransNet. *South Bay Rapid*. https://www.keepsandiegomoving.com/Rapid-Group/SouthBayRapid_introduction.aspx
6. HELIX Environmental Planning, Inc. (August 2018). *University and Innovation District SPA Plan Project Final Environmental Impact Report, 1-59-1-60, 5.8.*
7. California Energy Commission Retail Electricity Supplier Annual Power Content Labels for 2018.
8. Esri ArcGIS Business analyst (Version 8.1). (2019). American Community Survey socioeconomic profiles. 45-minute drive towards the site on a typical Monday at 8:30am. HR&A Advisors, Inc. Transit commute times based on existing public transit systems.
9. Keep San Diego Moving TransNet. *South Bay Rapid*. https://www.keepsandiegomoving.com/Rapid-Group/SouthBayRapid_introduction.aspx
10. California Realtors Association. (Q4 2019). *Housing Affordability Index.*

ENVIRONMENTAL SUSTAINABILITY

The site lies within an ideal climate zone in terms of minimizing energy infrastructure and providing a comfortable academic environment and has minimal to moderate resilience factors, which are planned for in the Climate Action Plan. The City of Chula Vista has established progressive ZNE and carbon neutrality goals dating back 30 years. Approaches to water management and green building policies are recommendations rather than requirements, setting the community below CSU policy. A standard waste policy demonstrates minimum compliance with state regulations, and there is minimal documentation to provide access to sustainable food systems. The multi-criteria analysis (refer to Appendix B.2 for additional evaluation of the sustainability criteria) weighs each of these environmental sub-criteria to create an aggregate score, concluding that this site is partially aligned for campus development.

REGULATORY AND ENVIRONMENTAL BARRIERS

The Final Environmental Impact Report (EIR) was certified in 2018; it environmentally clears approximately 390 acres for 10 million square feet of development. The university land uses were assumed to include approximately 20,000 students and 6,000 faculty and staff. Innovation uses, including a mix of office, laboratory, and retail uses, were assumed to support up to 8,000 other jobs. In addition, 2,000 units of market-rate units were expected to include approximately 5,400 students and 6,000 non-students. A total of 13,500 parking spaces would be provided. At this location, impacts to agricultural lands and scenic vistas may trigger topic-related measures depending on site-specific development conditions. Loss of agricultural lands is envisioned in the adopted Otay Ranch General Development Plan.

Future entitlement actions required include that a Tentative Map (TM) and final map be submitted to and approved by the City; the City would ultimately determine whether additional environmental review is required. If required, an addendum would be expected to take approximately six months, but may be streamlined by applicable CEQA exemptions and the City's demonstrated support of the project. Overall, anticipated CEQA clearance for new entitlements in the Chula Vista University and Innovation District is expected to be quick and easy.

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5.3 City of Concord, Concord Reuse Project Campus District

5.3.1 CAMPUS DEVELOPMENT SCENARIO

The existing CSU Off-Campus Center in Concord—Cal State East Bay Concord Campus—is located at the periphery of the Concord/Walnut Creek Area. Although the CSU owns the land at this site, further capital investment beyond the existing campus is challenged due to its isolated location and lack of access to transit, creating barriers to access for students, faculty, and staff. Additionally, the site has steep terrain and the surrounding area lacks supporting amenities, including multifamily housing suitable for students. In comparison, the Concord Reuse Project Campus District is located proximate to transit near downtown Concord and is proposed to be within a mixed-use district which includes housing and commercial uses. A Blue Ribbon Committee tasked with developing a vision for the Concord Reuse Project Campus District identified a "Hybrid Model" that could co-locate multiple higher education institutions at the Campus District site. This suggests that a University Center could effectively align with stakeholder interests, offering expanded coursework targeted to industry needs, in line with the vision for the Campus District. However, a University Center development scenario would require the development of facilities by a third party for lease by the CSU, and no developer has been identified to date for the Reuse Project Campus District. As such, this Report evaluates a University Center and Branch Campus, both of which would be associated with California State University, East Bay or another CSU campus.

5.3.2 CRITERIA EVALUATION

SOCIOECONOMIC / INDUSTRY

Regional Enrollment Demand	◐
Ability to Serve First-Generation Students	○
Ability to Serve Underrepresented Minorities	◐
Ability to Serve Lower-Income Populations	○
Regional Workforce / Industry Need	●

REGIONAL ENROLLMENT DEMAND

Enrollment demand within the Bay Area Cluster is expected to grow from 75,800 FTES in 2019 by approximately 4,700 students by 2035, peaking in 2025 at approximately 81,200 FTES before declining to 79,000 FTES in 2035 (see Table 3.3 in Section 3.3). The Bay Area Cluster campuses' Planned Capacity of 74,300 FTES modestly exceeds total enrollment demand, indicating that future growth can be accommodated at existing campuses. This is largely driven by growth in A-G completion, as the number of high school graduates is projected to decline by approximately 10 percent over the projection period, and community college enrollment is projected to decline or remain stable.

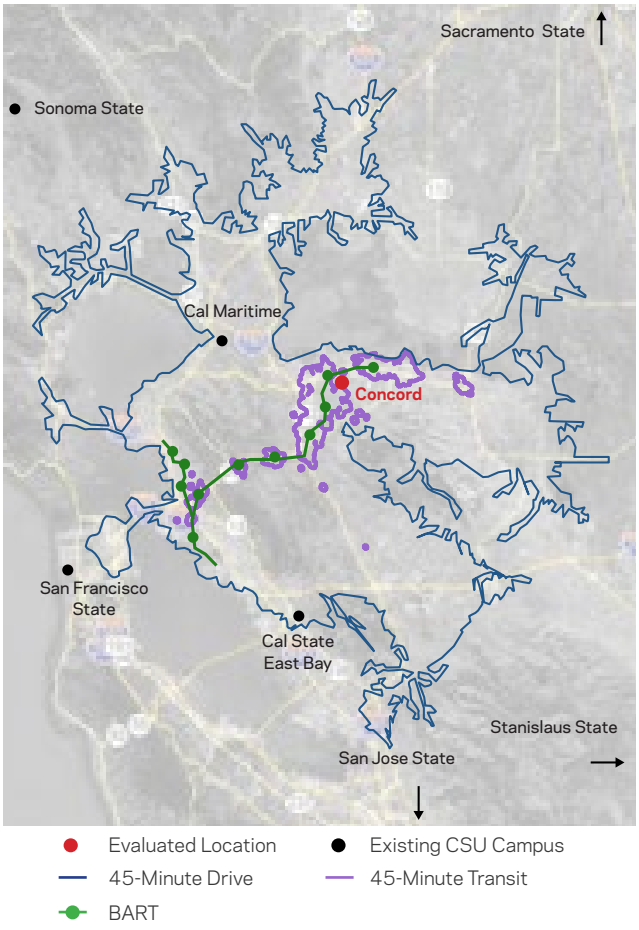
ABILITY TO SERVE FIRST-GENERATION STUDENTS

The residential population within a 45-minute drive of the Concord Reuse Project Campus District ("Campus District") falls above the state average in terms of educational attainment (53 percent of the population hold an associate's degree or higher, compared to the state average of 42 percent), indicating a smaller share of potential first-generation students in the City of Concord than the state average.[1]

ABILITY TO SERVE UNDERREPRESENTED MINORITIES

The residential population within a 45-minute drive of the Campus District falls slightly below the state average in share of historically underrepresented minorities (29 percent, compared to the statewide share of 33 percent), indicating that investment in other areas of the state could better serve underrepresented minorities.[2]

Figure 5.5 Concord Commute Shed Map



Source: Esri ArcGIS Business Analyst (Version 8.1). (2019). 45-minute drive toward the site on a typical Monday at 8:30am. HR&A Advisors, Inc. transit shed analysis of existing public transportation systems.

1. Esri ArcGIS Business Analyst (Version 8.1). (2019). American Community Survey socioeconomic profiles. 45-minute drive toward the site on a typical Monday at 8:30am.
2. Esri ArcGIS Business Analyst (Version 8.1). (2019). American Community Survey socioeconomic profiles. 45-minute drive toward the site on a typical Monday at 8:30am.

Figure 5.6 Concord Reuse Project Campus District Aerial

Table 5.5 Concord Region – Higher Education Institutions

Institution	Location	Type	Enrollment (FTES)
California State University, East Bay	Hayward	CSU	12,054
Cal State East Bay Concord Campus	Concord	CSU – OCC	297
University of California, Berkeley	Berkeley	UC	38,000
Diablo Valley College	Concord	Community College	19,600
Laney College	Oakland	Community College	13,500

ABILITY TO SERVE LOWER-INCOME POPULATIONS

The residential population within a 45-minute drive of the Campus District falls above the state median household income ($93,500, compared to the state median income of $74,500), indicating a smaller share of lower-income potential students in the City of Concord compared to the state average.[3] The Bay Area Cluster has a meaningful share of extremely high-wage positions that drive up the median household income for the area, but stakeholders noted that the statistic does not fully capture the dramatic existing wealth gap, particularly among growing East Bay communities.

Stakeholders cited regional impacts on mobility, including vehicular traffic in and out of the greater San Francisco Bay Area, limited mass transit options, and housing affordability. The issues relative to vehicular traffic and limited transit options were also the primary issues cited as having a negative impact on access and ability to serve first-generation students, underrepresented minorities, and lower-income populations on the Cal State East Bay main campus and the Cal State East Bay Concord Campus, which has limited course offerings.

REGIONAL WORKFORCE/INDUSTRY NEED

Occupational demand within the Bay Area Cluster is exceptionally high and accounts for more than 20 percent of projected occupational demand across the state, with more than 50 percent of statewide demand for computer and math-related occupations, due in large part to the presence of Silicon Valley (see Table 4.5 and Section 4). Despite five CSU campuses and numerous other colleges and universities in the Bay Area, there is still a meaningful projected supply gap in every occupational category, with the largest gap in computer science and math-related occupations.

3. Esri ArcGIS Business Analyst (Version 8.1). (2019). American Community Survey socioeconomic profiles. 45-minute drive toward the site on a typical Monday at 8:30am.

ACADEMIC

Partnerships with and Impacts on Interrelated Insitutions	◐
Alignment with Local Industry	◐

PARTNERSHIPS WITH AND IMPACTS ON INTERRELATED INSTITUTIONS

Concord is located in the Bay Area Cluster. The Cluster is served by seven public options for bachelor's degrees as well as a variety of private options (see Table 5.5). Two of the five Evaluated Locations are in the Cluster. With an acceptance rate of approximately 17 percent, UC Berkeley is generally not considered a viable alternative. Cal State East Bay has an acceptance rate of 76 percent, with nursing being the only impacted program.

While Diablo Valley College is well respected in the region, it has seen enrollment declines in recent years, causing continued budgetary crises. The robust Bay Area economy was cited as being the primary cause of the decline, as students chose to enter the workforce instead of enrolling in higher education.

Based on the Blue Ribbon Report and stakeholder engagement, a priority is around workforce match, and they specifically identified the polytechnic programs and interest in partnerships with Cal Poly San Luis Obispo and Extended Learning at CSU San Marcos.

ALIGNMENT WITH LOCAL INDUSTRY

Concord stakeholders noted potential synergies between the Blue Ribbon Committee's vision for the Campus District and the Northern Waterfront Economic Development Initiative strategy (which plans to create 18,000 new jobs by 2035 focused on advanced manufacturing, food processing, and cleantech fields). Stakeholders did not note any specific industry partnerships or industry funding commitments currently anticipated for a new higher education campus.

PHYSICAL / COMMUNITY

Land Availability	●
Physical Infrastructure Availability	◐
Campus Access and Surrounding Area Density	●
Housing Availability	◐
Access to Community Services and Amenities	◐
Environmental Sustainability	●
Regulatory and Environmental Barriers	◐

LAND AVAILABILITY

The Concord Reuse Project Campus District has 125 acres of land area designated as "Campus" within the Specific Plan.[4] Zoned as Commercial Campus, 14 acres are dedicated for public rights of way and open space and 22 acres are less developable (18 are likely encumbered with steep slopes over 20 percent grade), leaving 89 acres available for a future Branch Campus or University Center campus. The Master Plan allows for 3,100,000 GSF within the "Campus" district.

A low-density Branch Campus development scenario could accommodate 2,135,000 GSF of academic program for Occupied Facilities (see Appendix A.7) within this Report's campus development scenarios. This can be accommodated within the current framework program without any further changes. This Report utilizes an HOK proprietary digital tool to determine campus density scenarios, as described in the methodology section in Appendix A.7. Utilizing this tool, it was found that a low-density Branch Campus development scenario requires approximately 100 acres. Therefore, the site is approximately 10.9 acres short of land allocated on site as "Campus" in the Master Plan.

Development of a University Center at the Concord Reuse Project Campus District would take advantage of the planned mixed-use development, and the CSU could lease space within the Campus District. The site currently has no existing buildings. The proposed University Center would require the construction of facilities by others, likely to be associated with other uses, such as office, retail, or multifamily residential. A University Center campus model with 500 FTES would require approximately two acres of land area for 55,000 GSF of new academic space. There is ample unencumbered, available land on the site to accommodate this need.

PHYSICAL INFRASTRUCTURE AVAILABILITY

The potential campus site is located within the City of Concord's Reuse Project Campus District, which is part of the larger redevelopment of the Concord Naval Weapons Station. This site is a former Naval Weapons Base and a brownfield site, with no existing infrastructure. The Final EIR for Concord's General Plan was prepared at a programmatic level and environmentally clears approximately 8.5 million square feet of non-residential uses and 13,000 housing units.

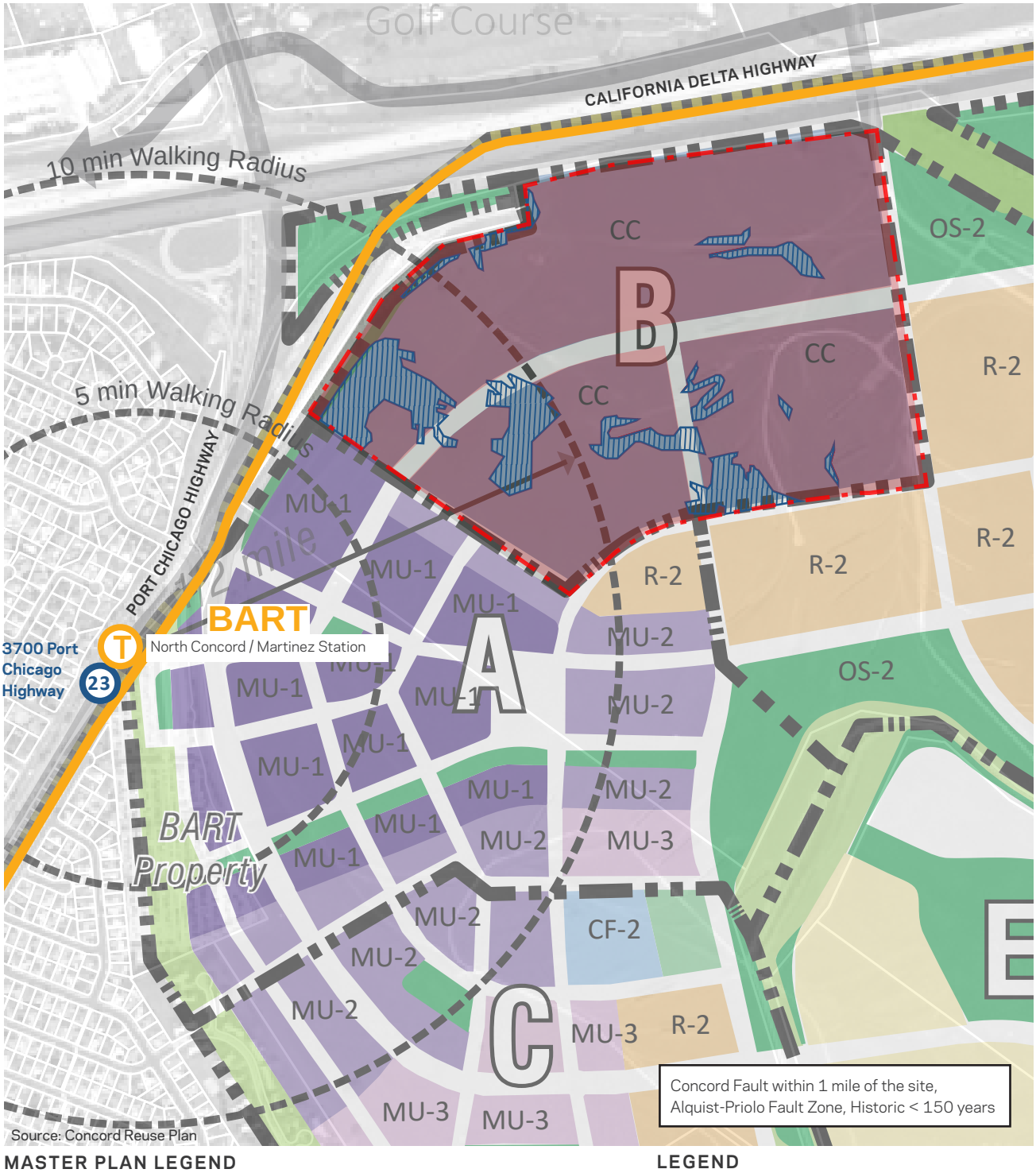
Soil/Geotechnical

A Branch Campus development will require a moderate amount of clearing, grading, and cut and fill earthwork. Based on the Draft Supplemental EIR (SEIR),[5] there are no significant soil conditions on the site related to geology or seismicity. Because the timing of a Concord Reuse Project Specific Plan EIR is uncertain and the Specific Plan does not currently include residential uses in the Campus District, a stand-alone project-level-focused EIR would likely be required for a Branch Campus development scenario to investigate the impact of housing within the Campus District. Due to past activity on the former naval base, all projects within the District that contemplate residential use will be required to comply with federal, state, and local regulatory requirements with respect to the handling and remediation of hazardous waste. Site remediation of the Campus District area for institutional use has been and will continue to be completed by others and would not be a responsibility of the CSU.

4. The City of Concord. (19 November 2018). Notice of Preparation (NOP) of a Draft Environmental Impact Report Concord Reuse Project Specific Plan, 7: Table 2, 8: Table 3.
5. Michael Brandman Associates. (11 April 2012). DRAFT Supplemental Environmental Impact Report to the 2030 Concord General Plan EIR, 1–5.

Concord Reuse Project Campus District

BAY AREA CLUSTER



MASTER PLAN LEGEND

- MU-1: Mixed Use
- MU-2: Mixed Use
- MU-3: Mixed Use
- C-2: Commercial Flex
- R-2: Medium density Residential
- CF-2: Schools
- CC: Campus
- OS-1: Creek Corridor
- OS-2: District & Citywide Parks
- OS-3: Greenway, Canal Park etc.
- OS-4: Joint Use School Fields

LEGEND

- Property Boundary
- Resulting Site Area for Campus Use
- Walk Score
- Steep Slopes (over 20%)
- Existing Transit Station
- Existing Transit Line

N 0 400 800 1600FT

Figure 5.7 Concord Reuse Project Campus District – Site Area Evaluation Plan

Table 5.6 Concord Reuse Project Campus District Site Summary

Site Summary Table	
Land Area for Campus Development Scenarios	7,500 FTES Branch = 100 acres
	500 FTES University Center = 2 acres
Cluster	Bay Area
Existing Campus Density	Low Density
Proposed Campus Density	Low Density
Existing Site Land Area	2,250 acres
Total Designated Land Area for University Use	**125 acres**
Area Dedicated to Unoccupied Facilities	14
Steep Slopes (over 20%) or Other Significant Conditions	22
Resulting Site Area for University Occupied Facilities	89
Implementation / Pre-Construction Status (EIR/ no EIR)	Final Environmental Impact Report

Source: (28 May 2019). *Concord Campus District Vision Framework*, 5.

Table 5.7 Concord Reuse Project Campus District Site Elements

Site Elements	Condition	Potentially Significant	Source
Land capacity criteria			
Steep slopes > 20%	Above 20%	Yes	United States Geological Survey
Streams	-	No	CA Department of Fish & Wildlife
High tension power lines	-	-	CA Energy Commission
Easements	Data Not Available	-	-
Large tree stands, arboretums or orchards	-	-	-
Agricultural research fields	-	-	-
Physical resiliency criteria			
Earthquake zones of required investigation			CA Department of Conservation
Landslides	-	Yes	
Liquefaction	Possible	Yes	
Fault Lines	Concord Fault within 1 mile of the site, Alquist-Priolo Fault Zone, Historic < 150 years	Yes	
Probabilistic ground shaking > 40%	Above 40%	Yes	CA Department of Conservation
Designated agricultural land	Grazing Land	No	CA Department of Conservation
Local access to agricultural resources > 2 miles	-	Yes	Local Harvest
Flood zones	Zone 'X'	No	FEMA
Fire risk zones	Elevated	Yes	California Public Utilities Commission
Hazardous materials	-	No	Concord 2030 Urban Area General Plan

Transportation

The Concord Reuse Project Campus District is currently served by the Bay Area Rapid Transit (BART) via the North Concord/Martinez BART station, which is located within a quarter-mile walk of the site. The Concord Reuse Plan identified specific roadway and transit network improvements needed to accommodate specific locations where traffic is expected to exceed capacity when the plan is fully built.

The EIR for the City's General Plan includes a Statement of Overriding Considerations for significant and unavoidable impacts to transportation. The General Plan's EIR also states that transportation impacts will not typically be mitigated by adding additional lanes or expanding intersections; instead, transportation impacts will typically be mitigated with transportation demand management and fees to expand local bus service and improve the freeway system. It is expected that similar significant transportation impacts will also be identified by the EIR for the new Specific Plan being developed for the area, and that these impacts will be mitigated with similar measures. Overall, it is expected that the cost, effort, and time associated with transportation mitigations to accommodate CSU expansion at this site will be moderate in comparison to other sites.

Infrastructure Systems

The Concord Reuse Project Campus District will require power, water, recycled water, and wastewater infrastructure to support development of a University Center or Branch Campus. Based on the SEIR,[6] there are no significant conditions related to the utilities and service systems.

The Concord Reuse Project Area Plan does not make any recommendation regarding a central utility plant and related distribution network. A campus approach towards central or distributed energy systems should be identified as part of the site evaluation. The Concord Reuse Project Area Plan recommends on-site energy generation through 35–75 percent utilization of available rooftop area for solar systems to support campus ZNE goals, while the Pacific Gas & Electric Utility delivered 39 percent of its energy from renewable sources in 2018, according to the California Energy Commission.[7]

CAMPUS ACCESS AND SURROUNDING AREA DENSITY

The Concord Reuse Project Campus District is accessible to 889,000 people under age 25 within a 45-minute drive at peak commute times and 53,000 people under age 25 within a 45-minute transit commute, accounting for approximately 38 and 2 percent of the overall Bay Area Cluster population, respectively.[8] The site is transit accessible via the adjacent North Concord/ Martinez BART Station. Although sizeable populations live within a 45-minute drive, extended commutes can be challenging for students, especially those without access to a car.

HOUSING AVAILABILITY

The Concord Reuse Project anticipates the build-out of a diverse mix of over 12,000 low- to high-density residential units, of which many higher-density units will be built in initial phases of the project in close proximity to the Campus District. City Council policy calls for 20 percent of the units in the Concord Reuse Project to be affordable, low-income and moderate-income housing. Historically, Contra Costa County housing costs have exceeded state averages, although they are far below average housing costs in the expensive Bay Area.[9]

ACCESS TO COMMUNITY SERVICES AND AMENITIES

The Concord Reuse Project Campus District site has an existing Walk Score of 23, meaning that the site is currently car dependent and almost all errands require a car. Its Transit Score is 45, meaning there are some nearby public transportation options, and its Bike Score of 22 reveals that the site has minimal bicycling infrastructure today. These results are based on the currently possible 20-minute walk from the site's entry at approximately 3700 Port Chicago Highway into the surrounding neighborhoods, which contain a moderate number of dining establishments, schools, and cultural and entertainment venues, a very limited number of everyday errands shopping opportunities and publicly accessible parks, and no grocery stores.

Based on the Master Plan, once developed, the Concord Reuse Project Campus District site will significantly improve its Walk Score through the benefits of a master planned, walkable built environment.

ENVIRONMENTAL SUSTAINABILITY

The Concord Reuse Project Campus District lies within a moderate climate to minimize energy infrastructure and provide for a comfortable academic environment. Its minimal resilience challenges are actively addressed in the Climate Action Plan. The city has established progressive zero net energy (ZNE) and carbon neutrality goals, with active tracking. Approaches to water management and green building policies exceed that of CSU policy. A standard waste policy demonstrates minimum compliance with state regulations. There is minimal documentation to assess availability of sustainable food systems. The multi-criteria analysis (see Appendix B.2 for additional evaluation of the sustainability criteria) weighs each of these environmental sub-criteria to create an aggregate score concluding that this site is well aligned for campus development.

REGULATORY AND ENVIRONMENTAL BARRIERS

As the evaluated campus site is located within the City of Concord's Reuse Project Campus District, the City's General Plan programmatic-level EIR, certified in 2012, environmentally clears approximately 8.5 million square feet of non-residential uses and 13,000 housing units. A Notice of Preparation (NOP) for an Environmental Impact Report (EIR) for an updated Specific Plan

6. Michael Brandman Associates. (11 April 2012). DRAFT Supplemental Environmental Impact Report to the 2030 Concord General Plan EIR, 1-5.
7. California Energy Commission Retail Electricity Supplier Annual Power Content Labels for 2018.
8. Esri ArcGIS Business Analyst (Version 8.1). (2019). American Community Survey socioeconomic profiles. 45-minute drive towards the site on a typical Monday at 8:30am. HR&A Advisors, Inc. Transit commute times based on existing public transit systems.
9. California Realtors Association. (Q4 2019). Housing Affordability Index.

for the Reuse District, identified as the Concord Reuse Project Specific Plan, was circulated in November 2018. The NOP states that a broad and comprehensive range of potential impacts are expected to be evaluated under CEQA, but the evaluation has not yet been released.

Because the timing of the Concord Reuse Project Specific Plan EIR is uncertain and the Specific Plan does not currently include residential uses in the Campus District, an EIR for a CSU campus Master Plan would likely be required. The expected CEQA processing time is approximately 12 to 18 months, but may be streamlined by applicable CEQA exemptions. Uncertainty of the timing of the Specific Plan EIR is compounded by the fact that the City has not yet procured a master developer for the project after negotiations broke down in early 2020. It is recommended that the CSU continue (and perhaps increase) participation in Specific Plan preparation efforts to support the desired outcomes and a more streamlined, cost-effective approach to full entitlement.

Since being listed as a Superfund site, the Navy has been following a clean-up process in accordance with Department of Defense (DOD) programs. Among the hazardous materials that have been addressed are: storage tanks, transformers, electrical equipment, and pre-1979 fluorescent light ballasts, which sometimes contain small amounts of polychlorinated biphenyls (also known as PCBs); building materials such as lead-based paint and asbestos (which remain in existing buildings, though not in the Campus District area); and X-ray facilities and materials testing. The Navy completed a radiological assessment of the site in 2009, which concluded that there was low potential for residual radioactive contamination. The site has been cleaned up to conditions that are compatible with the planned uses and activities of the Area Plan adopted by the Concord City Council on January 24, 2012, and the Final EIR listed "Hazards and Hazardous Materials" as Environmental Issues Determined Not To Be Significant.

As a note, even though the Campus District planned for residential uses (which are more sensitive than commercial, academic, or other institutional uses), and they were covered in the EIR, any subsequent development project within the Campus District that contemplates residential uses will be required to comply with the latest regulatory requirements for hazardous waste. Even with this myriad of complex environmental constraints associated with the disposition of the former naval base, general local support for redevelopment of the Campus District has been again demonstrated by the 2019 Concord Campus District Vision. Overall, anticipated CEQA clearance for new entitlements in the Concord Reuse Project Campus District are expected to be moderate in terms of difficulty and processing time, relative to other potential project sites.

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5.4 City of Palm Desert, CSUSB Palm Desert Campus

5.4.1 CAMPUS DEVELOPMENT SCENARIO

In 2018, the CSU Board of Trustees approved a Master Plan for the growth of the existing CSUSB Palm Desert Campus to 8,000 FTES (the campus has a Current Capacity of 1,904 FTES, with an enrollment of 840 FTES in Fall 2018). This Master Plan anticipates a continued relationship with California State University, San Bernardino, with a long-term vision for expanding the Off-Campus Center to include both housing and lower-division coursework, which would be in alignment with the Branch Campus development scenario as discussed in Section 4.3. The relatively limited population density of the Coachella Valley would require the campus to attract students from across the state, and an independent Traditional Campus or Branch Campus with a strong brand identity would be more suitable for this purpose. As such, this Report analyzes Traditional Campus and Branch Campus development scenarios in Palm Desert.

5.4.2 CRITERIA EVALUATION

SOCIOECONOMIC / INDUSTRY

Regional Enrollment Demand	◐
Ability to Serve First-Generation Students	●
Ability to Serve Underrepresented Minorities	◐
Ability to Serve Lower-Income Populations	●
Regional Workforce / Industry Need	◐

REGIONAL ENROLLMENT DEMAND

Enrollment demand within the Inland Empire Cluster is expected to grow by approximately 5,500 students by 2035 to 23,600 FTES (see Table 3.3 in Section 3.3). Growth is driven by a combination of increase in A-G completion rates and near-term growth anticipated in community college transfers. Nevertheless, Cal State San Bernardino's Planned Capacity of 25,000 FTES modestly exceeds total enrollment demand (not including the CSUSB Palm Desert Campus, with 840 FTES enrolled in Fall 2018), indicating that future growth can be accommodated at the existing San Bernardino campus and CSUSB Palm Desert Campus in alignment with growth in demand from the regional population, which is mostly concentrated closer to the existing San Bernardino campus.

ABILITY TO SERVE FIRST-GENERATION COLLEGE STUDENTS

The residential population within a 45-minute drive of the CSUSB Palm Desert Campus has the second lowest share of population with an associate's degree or higher (32 percent, compared to the state average of 42 percent), indicating potential for the site to serve a large population of first-generation college students, compared to the other Evaluated Locations.[1]

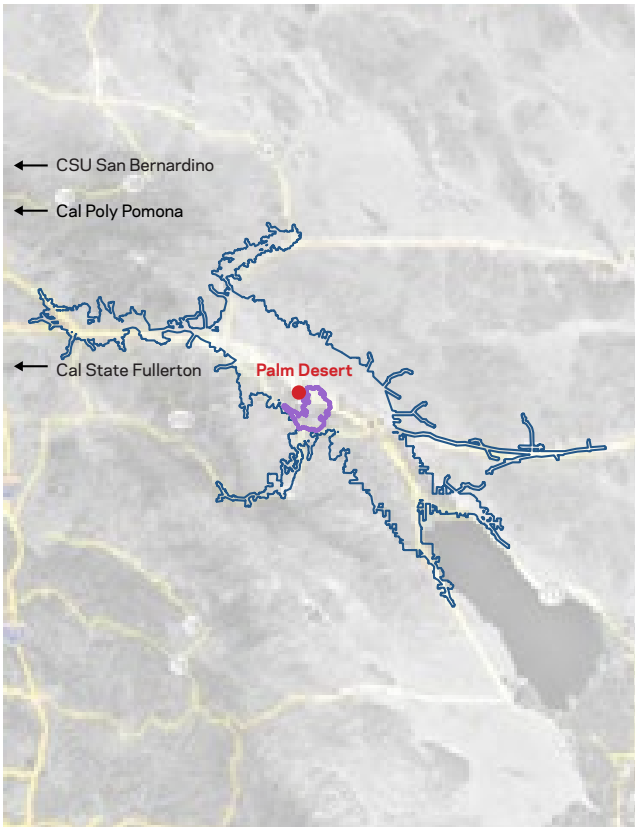
ABILITY TO SERVE UNDERREPRESENTED POPULATIONS

The residential population within a 45-minute drive of the CSUSB Palm Desert Campus has the highest share of historically underrepresented minorities (38 percent, compared to the statewide share of 33 percent) and is the only site to rank significantly higher than, but still within 20 percent of, the statewide average.[2]

ABILITY TO SERVE LOWER-INCOME POPULATIONS

The residential population within a 45-minute drive of the CSUSB Palm Desert Campus has the lowest median household income of the identified sites of the Evaluated Locations ($54,000, compared to the state median income of $74,500).[3] Similar to the San Joaquin County (Stockton) location, the economy of the Coachella Valley is composed of a large number of lower-wage jobs, as compared to the more urban Evaluated Locations, driving down median household income.

Figure 5.8 Palm Desert Commute Shed Map



Source: Esri ArcGIS Business Analyst (Version 8.1). (2019). 45-minute drive toward the site on a typical Monday at 8:30am. HR&A Advisors, Inc. transit shed analysis of existing public transportation systems.

1. Esri ArcGIS Business Analyst (Version 8.1). (2019). American Community Survey socioeconomic profiles. 45-minute drive toward the site on a typical Monday at 8:30 a.m.
2. Esri ArcGIS Business Analyst (Version 8.1). (2019). American Community Survey socioeconomic profiles. 45-minute drive toward the site on a typical Monday at 8:30 a.m.
3. Esri ArcGIS Business Analyst (Version 8.1). (2019). American Community Survey socioeconomic profiles. 45-minute drive toward the site on a typical Monday at 8:30 a.m.

Figure 5.9 CSUSB Palm Desert Aerial

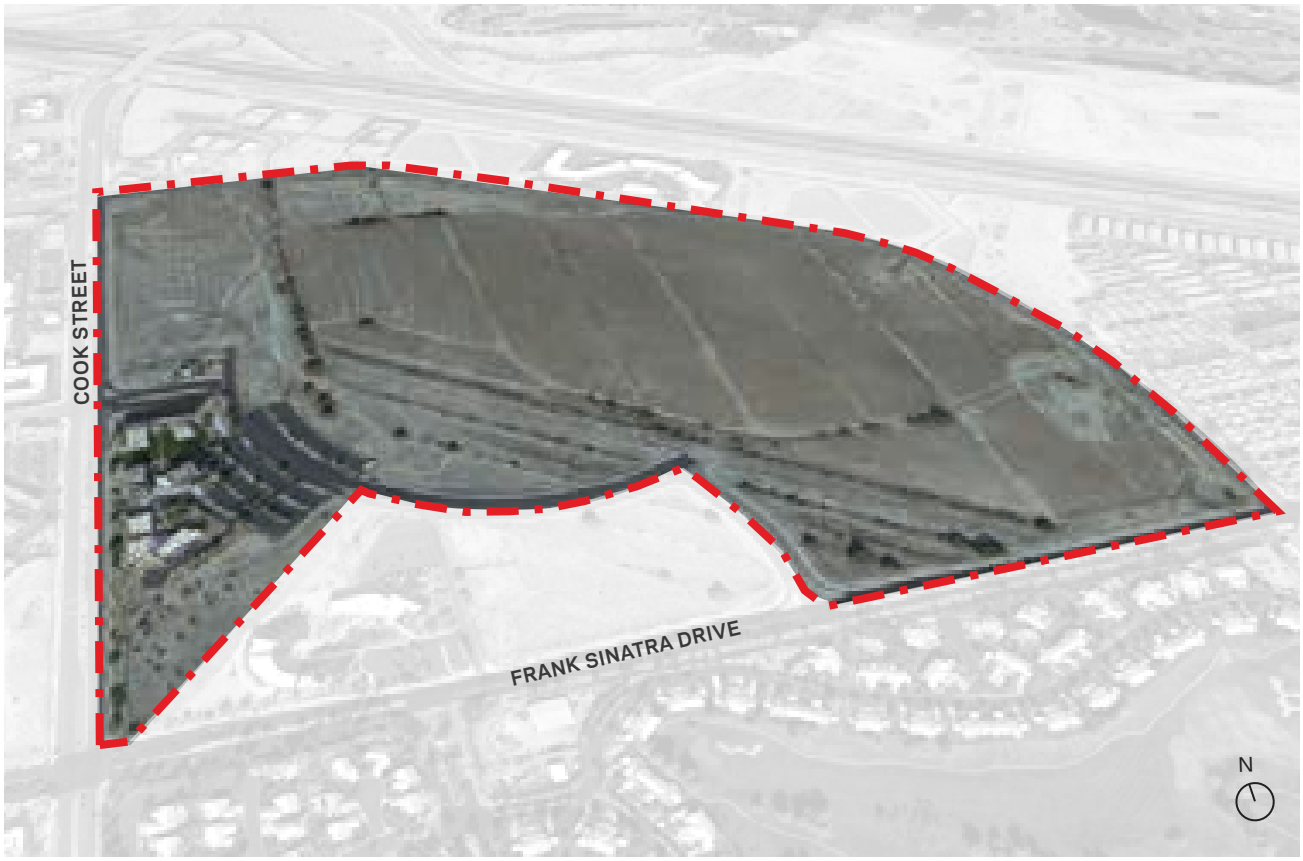


Table 5.8 Palm Desert Region – Higher Education Institutions

Institution	Location	Type	Enrollment (FTES)
California State University, San Bernardino	San Bernardino	CSU	16,907
CSUSB Palm Desert Campus	Palm Desert	Off-Campus Center	840
University of California, Riverside	Riverside	UC	21,385
College of the Desert	Palm Springs	Community College	10,466

REGIONAL WORKFORCE AND INDUSTRY NEEDS

The Inland Empire Cluster is projected to see modest occupational demand in 2026 for jobs requiring a bachelor's degree or higher, particularly for finance and operations managers, schoolteachers, health care workers, counselors, and social workers (see Table 4.7 and Section 4.2.1). Although Cal State San Bernardino offers a wide range of programs, there are large gaps between occupational demand and degree conferral for teachers and health care workers, and few other higher education institutions in the region to meet these needs.

ACADEMIC

Partnerships with and Impacts on Interrelated Insitutions	●
Alignment with Local Industry	●

PARTNERSHIPS WITH AND IMPACTS ON INTERRELATED INSTITUTIONS

Table 5.8 includes a snapshot of the current higher education ecosystem of the region. Palm Desert is located in the Inland Empire Cluster. There are two public options for a bachelor's degree in this Cluster—University of California, Riverside and California State University, San Bernardino. UC Riverside has an acceptance rate of 57 percent and Cal State San Bernardino has an acceptance rate of 69 percent. The primary issue that has a negative impact on accessibility to both Riverside and San Bernardino is their physical distance (greater than 60 miles) from the Coachella Valley.

College of the Desert is addressing growing enrollment demand by expanding throughout the Coachella Valley. Additionally, the college is expanding programs into curricular areas that will result in higher-wage jobs in those workforce areas local to the region—primarily hospitality and health care.

The primary limitations cited by local stakeholders on mobility related to attendance at other proximate CSU campuses were socioeconomic and cultural. And while stakeholders valued the brand identity of Cal State San Bernardino, there was an emphasis placed on having an independent campus in this location to continue to garner community investment in this regional asset. Of primary concern was the location's proximity to transit, breadth of degree offerings relative to workforce demand, and ties to the unique cultural circumstances of the location.

Cal State San Bernardino recently completed a Campus Master Plan specific to the Palm Desert location. The Plan cited the potential for increased higher education participation rates with improved access to comprehensive degree offerings within proximity to the students in the region.

With increased offerings in this location, there is some potential that application rates and enrollment at Cal State San Bernardino would be marginally impacted. However, given impaction in critical workforce programs throughout the Los Angeles, San Diego, and Inland Empire regions, any impact would likely be made up by a redistribution of students in other locations.

ALIGNMENT WITH LOCAL INDUSTRY

The largest industries in Palm Desert include hospitality and agriculture, which mostly employ workers who do not need bachelor's degrees, although stakeholders noted that both the agriculture and energy industries (energy is one of the other largest sectors) must import skilled workers, and may be interested in industry partnerships. Stakeholders also noted that the current CSUSB Palm Desert Campus was largely built using donations from local businesses and philanthropy, although they did not note any specific industry partnerships or industry funding commitments currently anticipated for a future campus.

PHYSICAL / COMMUNITY

Land Availability	●
Physical Infrastructure Availability	◐
Campus Access and Surrounding Area Density	○
Housing Availability	●
Access to Community Services and Amenities	○
Environmental Sustainability	◐
Regulatory and Environmental Barriers	●

LAND AVAILABILITY

The CSUSB Palm Desert Campus has 168 acres within its campus boundary. Eighteen of those acres are already developed with existing buildings and infrastructure for CSU purposes. An additional 66 acres are part of an approved CSU Master Plan. Beyond these areas, 84 acres are also available and underutilized within the campus boundary. All 168 acres are available for potential CSU use for a new 7,500 FTES, a new 15,000 FTES, or a Branch Campus development scenario.

A moderate-density 7,500 FTES campus development scenario requires approximately 70 acres. The 18 acres currently developed support approximately 1,900 FTES. Therefore, approximately 52 additional acres would be needed to expand to 7,500 FTES. There is enough unencumbered, available land on the site to accommodate this growth within the CSU-approved Master Plan site area.

A moderate-density 15,000 FTES campus development scenario requires approximately 130 acres. If a 7,500 FTES campus development scenario is built, the campus will need an additional 60 acres for a total campus of 130 acres. There is enough unencumbered, available land on the site to accommodate a moderate-density 15,000 FTES campus development scenario.

A low-density Branch Campus development scenario requires approximately 100 acres. There is enough unencumbered, available land on the site to accommodate a Branch Campus development scenario within the campus boundary.

PHYSICAL INFRASTRUCTURE AVAILABILITY

This site is currently a greenfield site, with some existing infrastructure supporting the existing Off-Campus Center, which has a Current Capacity of 1,904 FTES on the site.

Soil/Geotechnical

Site development for the CSUSB Palm Desert Campus will require a moderate amount of clearing, grading, and cut and fill earthwork. Based on the 2016 Final EIR, any site impacts from soil and geology conditions were found to be less than significant.[4]

Transportation

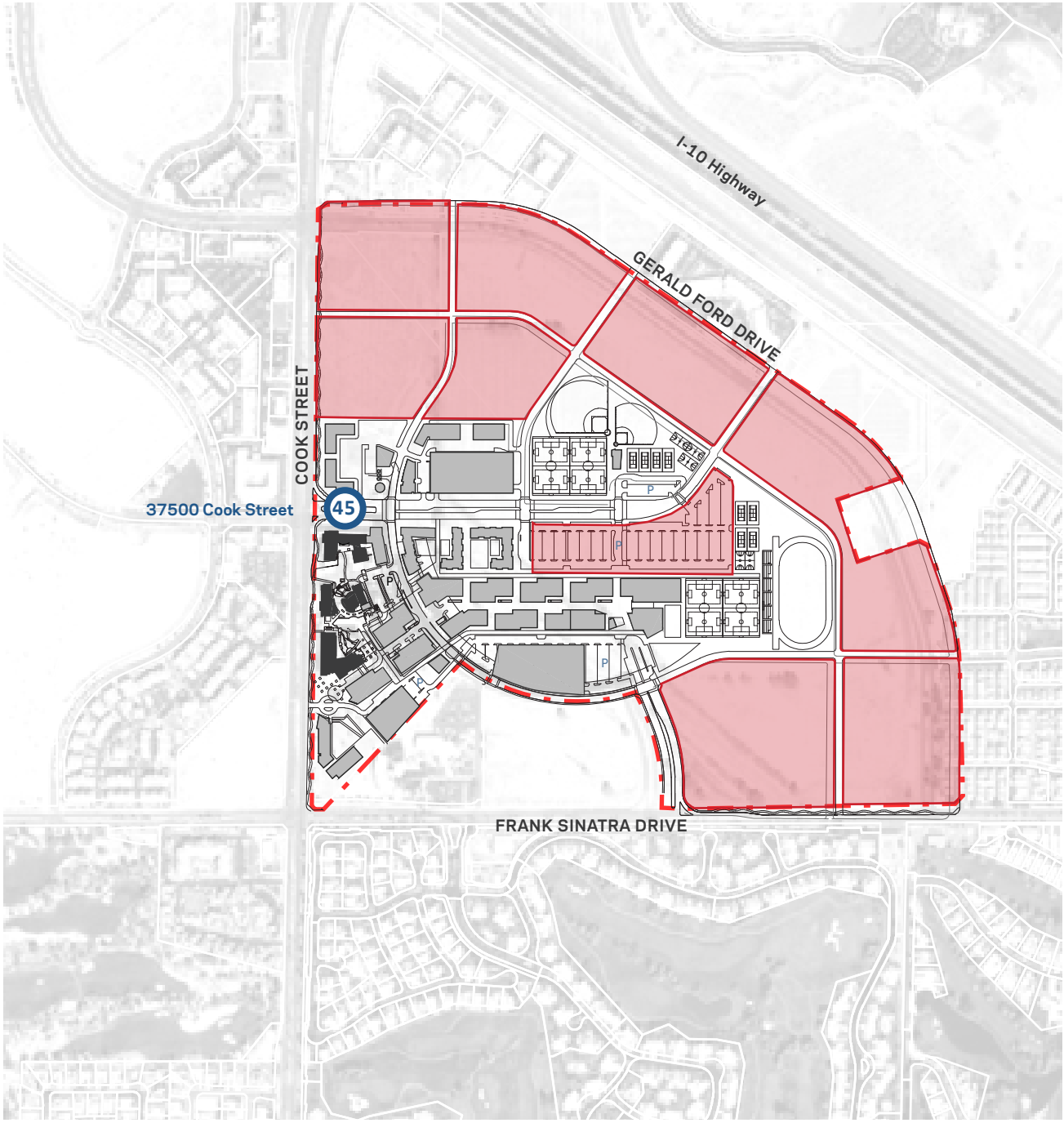
The CSUSB Palm Desert Campus is served by some bus transit today, and the city has had ongoing discussions for future transit infrastructure; however, there are no approved plans at this time.

The Campus Master Plan Final EIR environmentally cleared significant and unavoidable impacts to traffic; however, Cal State San Bernardino could require additional mitigations for project-specific transportation impacts. Developments consistent with the Campus Master Plan are expected to be responsible for their fair share of transportation mitigations specified in the EIR, which are contributions for signal-timing improvements. Overall, it is expected that the cost, effort, and time associated with transportation mitigations to accommodate CSU expansion at this site will be low in comparison to other sites.

4. WSP USA. (December 2017). *Final Environmental Impact Report, VII.*

CSUSB Palm Desert Campus

INLAND EMPIRE CLUSTER



LEGEND

- Property Boundary
- Existing Buildings
- Future Buildings
- P Existing Parking Lot
- P Future Parking Lot
- P Existing Parking Structure
- P Future Parking Structure
- Walk Score
- Resulting Site Area for Campus Use

N 0 400 800 1600FT

Figure 5.10 CSUSB Palm Desert Campus – Site Area Evaluation Plan

Table 5.9 CSUSB Palm Desert Campus Site Summary

Site Summary Table	
Land Area for Campus Development Scenarios	7,500 FTES Traditional Campus = 70 acres
	15,000 FTES Traditional Campus = 130 acres
	7,500 FTES Branch = 100 acres
Cluster	Inland Empire
Existing Campus Density	Low Density
Proposed Campus Density	Moderate Density (If Full Campus)
	Low Density (If Branch Campus)
Existing Site Land Area	**168 acres**
Current Campus Area	18
Master Planned Campus Area	66
Campus Area Available for Further Development	84
Steep Slopes (over 20%) or Other Significant Conditions	0
Enrollment	
Current Capacity	1,904 FTES
Planned Capacity	8,000 FTES
Density Metrics	
Current Density	3,845 SF/FTES
Planned Density	915 SF/FTES
Current Facilities FAR	0.01
Implementation / Pre-Construction Status (EIR/ no EIR)	Final Environmental Impact Report

Sources : WSP USA. (December 2017). *Final Environmental Impact Report*, VII. California State University, San Bernardino Palm Desert Off-Campus Center, Campus Master Plan. (Revised January 2018).

Table 5.10 CSUSB Palm Desert Campus Program Summary

Categories	Current Facilities		Approved Master Plan Growth	
Academic / Instructional Space	60,000	GSF	410,000	GSF
General Administration	30,000	GSF	240,000	GSF
Commons (Library + Union)	-	GSF	190,000	GSF
Auditoria / Performance with Exhibition	-	GSF	10,000	GSF
Central Plan and Facilities Support	-	GSF	30,000	GSF
Student Recreation and Wellness	-	GSF	110,000	GSF
Residential Life / Housing	-	GSF	210,000	GSF
Recreational Open Space	-	SF	-	SF
Structured Garages	-	GSF	930,000	GSF
Surface Lots	210,000	SF	610,000	SF
Total	**300,000**	**GSF**	**2,740,000**	**GSF**

Sources: CallisonRTKL, Inc. (2016). *CSUSB Palm Desert Campus Master Plan*, xii. The California State Univeristy Office of the Chancellor. (2018). Campus Facility Report.

Table 5.11 CSUSB Palm Desert Campus Site Elements

Site Elements	Condition	Potentially Significant	Source
Land capacity criteria			
Steep slopes >20%	None	No	United States Geological Survey
Streams	None	No	CA Department of Fish & Wildlife
High tension power lines	None	-	CA Energy Commission
Easements	Data Not Available	-	-
Large tree stands, arboretums or orchards	None	-	CSU Site Plans
Agricultural research fields	None	-	CSU Site Plans
Physical resiliency criteria			
Earthquake zones of required investigation			CA Department of Conservation
Landslides	-	No	
Liquefaction	Moderate	Yes	
Fault lines	-	No	
Probabilistic ground shaking > 40%	Above 40%	Yes	CA Department of Conservation
Designated agricultural land	Local Importance	No	CA Department of Conservation
Local access to agriculture resources > 2 miles	None	Yes	Local Harvest
Flood zones	Zone 'X'	No	FEMA
Fire risk zones	Low	No	California Public Utilities Commission

Infrastructure Systems

Both a Traditional and a Branch Campus development at the CSUSB Palm Desert Campus will require power, water, recycled water, and wastewater infrastructure augmentation and expansions of existing systems to support further development of the site. Based on the CSUSB PDC MEP Utilities Master Plan, there are no significant conditions related to the utilities and service systems. The Plan recommends phased construction of a central chilled water plant to serve the campus expansion through a new hydronic distribution network.

The CSUSB PDC Master Plan also calculated on-site energy generation through solar photovoltaic systems. Eighty percent of available rooftop area could provide 106 percent of all building energy use to support campus ZNE goals, while the Southern California Edison Utility delivered 36 percent of its energy from renewable sources in 2018, according to the California Energy Commission.[5]

CAMPUS ACCESS AND SURROUNDING AREA DENSITY

The CSUSB Palm Desert Campus is accessible to 172,000 people under age 25 within a 45-minute drive at peak commute times, and only 6,000 people under age 25 within a 45-minute transit commute, accounting for just 10 and less than one-half percent of the overall Inland Empire Cluster population, respectively.[6] As noted previously, extended commutes can be challenging for students, and stakeholders noted that many Palm Desert-area students do not have a car and that public transit service is infrequent, although improving. Campuses located within less dense population centers tend to struggle with faculty recruitment, particularly for faculty with working spouses or partners seeking specialized employment opportunities.

HOUSING AVAILABILITY AND AFFORDABILITY

Housing costs in the Coachella Valley are generally well below state averages.[7] However, there is generally little multifamily development apart from housing marketed toward retirees, which tends to be higher end and, in some cases, restricts younger residents.

ACCESS TO COMMUNITY SERVICES AND AMENITIES

The CSUSB Palm Desert Campus site has an existing Walk Score of 45, meaning that the site is currently car dependent and most errands require a car. It is located along two bus lines, Route 20 and Route 21. Its Bike Score of 50 reveals that the site has some existing bicycling infrastructure. These results are based on the currently possible 20-minute walk from the site's entry at approximately 37500 Cook Street into the surrounding neighborhoods, which contain a moderately high number of dining establishments, grocery stores, cultural and entertainment venues, and daily-errand shopping opportunities, and a very low number of publicly accessible parks.

ENVIRONMENTAL SUSTAINABILITY

The CSUSB Palm Desert Campus within the City of Palm Desert was evaluated for its suitability to advance CSU sustainability criteria. The site lies within a moderate climate to minimize energy infrastructure, provides for an uncomfortably hot academic environment, and has significant resilience challenges that are moderately addressed in the Climate Action Plan. The campus has established progressive zero net energy (ZNE) goals through onsite PV and carbon neutrality goals with active tracking. Water scarcity is an issue in Palm Desert, but the campus has an active plan to address water efficiency and reuse. Green building policies are in line with CSU policy. A standard waste policy demonstrates minimum compliance with state regulations, and there is minimal documentation suggesting access to sustainable food systems. The multi-criteria analysis (see Appendix B.2 for additional evaluation of the sustainability criteria) weighs each of these environmental sub-criteria to create an aggregate score concluding that this site is partially aligned for campus development.

REGULATORY AND ENVIRONMENTAL BARRIERS

The CSUSB Palm Desert Campus Master Plan was environmentally cleared through a 2017 programmatic level FEIR for a Campus Master Plan. The Plan included an approximately 85-acre expansion that can accommodate approximately 8,000 students and 616 beds in 408,000 square feet of development. Palm Desert's political climate generally supports this development, and the Planning Commission approved the University Neighborhood Specific Plan in 2018 (environmental clearance pending), which is intended to streamline student housing around the campus.

The Campus Master Plan EIR states that at the time each facility improvement or other action pursuant to the Master Plan is carried forward, Cal State San Bernardino will determine whether the EIR has fully addressed the potential impacts and identified appropriate mitigation measures. Unique circumstances related to current off-site conditions or unique project conditions may trigger the need for additional, topic-related measures depending on site-specific development conditions. Additional approvals and environmental clearance are required for any development not on CSU property and/or not within the parameters of the Campus Master Plan EIR. Overall, anticipated CEQA clearance for new entitlements for the CSUSB Palm Desert Campus are expected to be quick and easy relative to other potential project sites.

5. California Energy Commission Retail Electricity Supplier Annual Power Content Labels for 2018.
6. Esri ArcGIS Business Analyst (Version 8.1). (2019). American Community Survey socioeconomic profiles. 45-minute drive toward the site on a typical Monday at 8:30 a.m.
7. California Realtors Association. (Q4 2019). Housing Affordability Index.

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5.5 San Joaquin County (Stockton)

As discussed earlier, consistent with the state appropriations of the Budget Act of 2019, this Report provides a deeper level of analysis for San Joaquin County (Stockton). Accordingly, building upon Sections 3.3.3, San Joaquin County Enrollment Demand, 4.1.2, San Joaquin County Workforce Analysis, and 4.4.3, San Joaquin County Academic Program, this section evaluates potential CSU expansion in the county, specifically at three identified sites as shown in Figure 5.11: Stockton University Park, located close to the city center, San Joaquin County Fairground, to the south, and Stockton Education and Enterprise Zone, north of the city. Of the three sites, this section provides additional detail on phased expansion potential at Stockton University Park, where the current CSU Off-Campus Center—Stanislaus State Stockton Campus—is located. In addition to being land owned by the CSU and the home of existing CSU facilities, this site was selected for additional study due to its close proximity to the city's center and to local and regional transit, which positions it as more accessible than the other two sites. The Stockton University Park campus site is governed by a Joint Powers Authority (JPA) between the City of Stockton and the CSU within the boundaries of the University Park Master Development Plan (MDP). The MDP includes approximately 26 acres for educational uses to accommodate approximately 1,000 students, 21 acres for student housing, 26 acres for office use, and five acres for commercial/retail use.

All sites evaluated in San Joaquin County (Stockton) share the same larger context and the same key criteria. Therefore, the following section provides an overall context section, and information related to Sociodemographic criteria (Regional Enrollment Demand, Ability to Serve First-Generation Students, Ability to Serve Underrepresented Minorities, Ability to Serve Lower-Income Backgrounds, Regional Workforce/Industry Needs), Academic criteria (Partnerships with and Impacts on Interrelated Institutions, Partnerships with Local Industry), and certain Physical/Community criteria (Campus Access and Surrounding Density, Housing Affordability, and Environmental Sustainability as related to region). Other Physical/Community criteria are specific to each site and described in the site section for each location. These include Land Availability, Physical Infrastructure Availability, Soil/Geotechnical, Transportation, Infrastructure Systems, Access to Community Services and Amenities, and Regulatory and Environmental Barriers.

Context

Increased investment by the CSU in the City of Stockton would complement a comprehensive set of active civic investments being made by the city, county, private companies, philanthropic organizations, and nonprofit entities. These investments are part of a much larger initiative aimed at elevating equity, opportunity, education, and access for everyone within the city, San Joaquin County, and the surrounding region. One of these investments that has gained much attention is the experimental SEED program to provide universal income. The municipal leadership and stakeholders in Stockton consistently identify access to improved educational opportunities as the highest priority for the city and central to the comprehensive civic investments within the region. Although by no means comprehensive, a list of initiatives with a brief description of their scope is included in Appendix B.1.

A-G Readiness

Stockton's focus on improved A-G readiness rates underscores the city's prioritization and emphasis on improved education. During meetings with the City of Stockton and Stockton Unified School District (SUSD), SUSD pointed to the substantial increase in A-G-ready graduating seniors in 2019 data as evidence of a rapidly accelerating trend in SUSD's ability to support and deliver a growing pipeline of college-ready graduates.

A growing A-G readiness trend is a key indicator of the City of Stockton's commitment to college readiness, the importance of higher education across this community, and the ability to deliver higher education opportunities for these college-ready graduates. As CSU enrollment demands are linked to A-G readiness, statewide and in the immediate regions that they serve, Stockton's growth of college-ready high school graduates indicates a growing pipeline of prospective students to the CSU.

Public Transportation

Access to public transportation plays a critical role in a city's and region's ability to provide students with equitable access to higher education. During the stakeholder engagement meetings, the City of Stockton and San Joaquin County shared the significant public transportation improvements that have been completed, are underway, and are funded in the future to improve public access throughout the city and region. Continued investment in public transportation is a key indicator of a city's and community's prioritization of and commitment to equitable access, which would offer significant benefits for students to a CSU campus.

Equity

Stockton is the third largest metro area in the State of California without a public university.[1] During engagement meetings, the municipal and stakeholder leaders expressed that the lack of a complete CSU campus and curricular offerings in Stockton diminishes higher education prospects for SUSD high school students, who are often place-bound and cannot commute long distances to other CSU main campuses. The lack of equitable access to public higher education in the City of Stockton and the resultant lack of a large, skilled workforce was cited by the stakeholders and linked to why major employers have overlooked the city for future investment. Without these employers, students who are able to attend public universities in other locations often choose not to return, creating a "brain drain." For these reasons, the stakeholders shared their concern that Stockton is being left behind in terms of public higher education and the associated workforce creation potential.

1. US Census Bureau List of Urban Areas in California. (2010). Stockton is the third largest metro area in the State of California without a public university after Mission Viejo (which is adjacent to Irvine) and Temecula.

Stockton

UPPER CENTRAL VALLEY CLUSTER

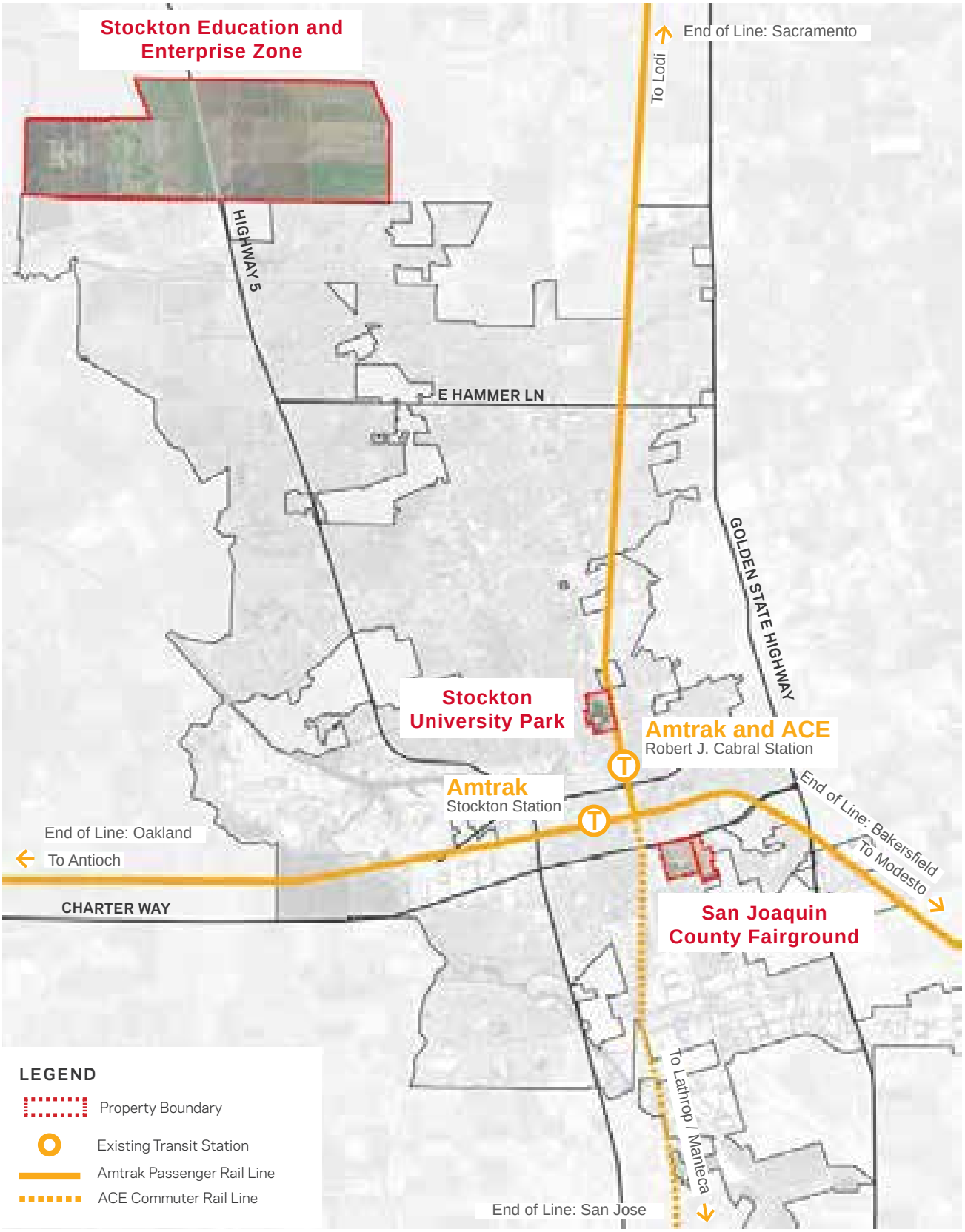


Figure 5.11 Three Sites within San Joaquin County (Stockton)

5.5.1 CAMPUS DEVELOPMENT SCENARIO

As explained in Section 4.4.3, San Joaquin County Academic Program, San Joaquin County would benefit from workforce-aligned academic programs such as Computer Science, Engineering, and Health Care-related, and graduates of these programs would have increased wage potential. This program could be achieved either through the transformation of the current Stanislaus State Stockton Campus into an independent Traditional Campus, or through the creation of a Branch Campus associated with a different, larger CSU campus with more resources and broader academic program offerings. This Report utilizes a Traditional Campus development scenario for evaluation at the San Joaquin County Fairground and Stockton Education and Enterprise Zone, and a Branch Campus development scenario for evaluation purposes at Stockton University Park, which represents an expansion of the existing Stanislaus State Stockton Campus currently occupying the Acacia Building at this site. In addition to the phased physical implementation of a Branch Campus at this location, Section 4.4.4 provides an outline of potential strategies for this development scenario.

5.5.2 CRITERIA EVALUATION

REGIONAL ENROLLMENT DEMAND

SOCIOECONOMIC / INDUSTRY

Regional Enrollment Demand	○
Ability to Serve First-Generation Students	●
Ability to Serve Underrepresented Minorities	◐
Ability to Serve Lower-Income Populations	◐
Regional Workforce / Industry Need	○

Enrollment demand within the Upper Central Valley Cluster is expected to grow by approximately 2,100 students by 2035 to 10,500 FTES (see Table 3.3 in Section 3.3). Growth is driven by a combination of modest growth in high school graduation associated with growth in residential population, increases in A-G completion, and near-term anticipated growth in community college transfers. Nevertheless, California State University, Stanislaus' Planned Capacity of 12,000 FTES exceeds total enrollment demand (not including the Stockton Off-Campus Center, Stanislaus State Stockton Campus, which enrolled approximately 219 students in 2018), indicating that future growth can be accommodated at the existing campus.

ABILITY TO SERVE FIRST-GENERATION STUDENTS

The residential population within a 45-minute drive of Stockton University Park, San Joaquin County Fairground, and Stockton Education and Enterprise Zone has the lowest share of the population with an associate's degree or higher (31 percent, compared to the state average of 42 percent) of any Evaluated Location, indicating the potential to serve a large population of first-generation students compared to other Evaluated Locations.[2]

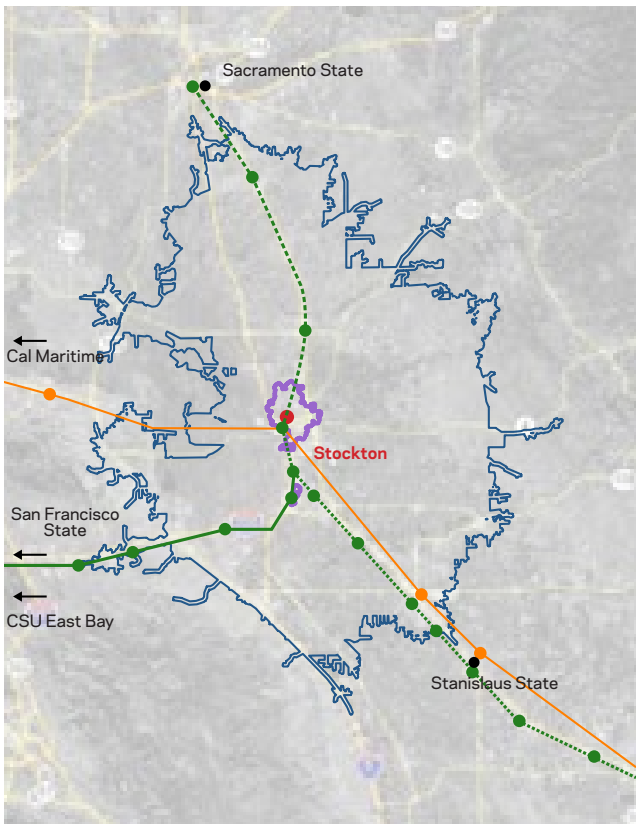
ABILITY TO SERVE UNDERREPRESENTED POPULATIONS

The residential population within a 45-minute drive of Stockton University Park, San Joaquin County Fairground, and Stockton Education and Enterprise Zone has a share of historically underrepresented minorities (34 percent) similar to the statewide average (33 percent), indicating that higher education investment in Stockton could serve a share of underrepresented populations that is in line with the state average.[3]

ABILITY TO SERVE LOWER-INCOME POPULATIONS

The residential population within a 45-minute drive of Stockton University Park, San Joaquin County Fairground, and Stockton Education and Enterprise Zone has the second lowest median household income of the identified sites within the Five Evaluated Locations ($66,000, compared to the state median income of $74,500).[4] The dominant industries in San Joaquin County (Stockton) are generally lower wage and do not require an advanced

Figure 5.12 Stockton Commute Shed Map



Source: Esri ArcGIS Business Analyst (Version 8.1). (2019). 45-minute drive toward the site on a typical Monday at 8:30am. HR&A Advisors, Inc. transit shed analysis of existing public transportation systems.

2. Esri ArcGIS Business Analyst (Version 8.1). (2019). American Community Survey socioeconomic profiles. 45-minute drive toward the site on a typical Monday at 8:30 a.m.
3. Esri ArcGIS Business Analyst (Version 8.1). (2019). American Community Survey socioeconomic profiles. 45-minute drive toward the site on a typical Monday at 8:30 a.m.
4. Esri ArcGIS Business Analyst (Version 8.1). (2019). American Community Survey socioeconomic profiles. 45-minute drive toward the site on a typical Monday at 8:30 a.m.

degree, creating a cyclical opportunity gap. Although there are some higher education institutions in the City of Stockton, stakeholders noted that students in the area often must travel outside of Stockton to pursue higher education and do not return because there are limited higher-paying professional opportunities in Stockton.

REGIONAL WORKFORCE/INDUSTRY NEED

Although not all of the high-demand occupations evaluated across the state are projected to be present in meaningful concentrations in the Upper Central Valley Cluster, which contains San Joaquin County, there is significant demand in several occupational categories, including computer science and math-related occupations, schoolteachers, and health care workers, for which California State University, Stanislaus has existing degree programs (see Table 4.6 in Section 4.2.1).

PARTNERSHIPS WITH AND IMPACTS ON ACADEMIC

Partnerships with and Impacts on Interrelated Insitutions	●
Alignment with Local Industry	●

INTERRELATED INSTITUTIONS

Stockton is located in the Upper Central Valley Cluster. There are two public options within the Cluster for bachelor's degrees, University of California, Merced and California State University, Stanislaus (see Table 5.12). California State University, Stanislaus has an acceptance rate of 89 percent, which makes it academically accessible. However, it is located 44 miles away from Stockton, with limited transit availability, and UC Merced is even farther, at 75 miles away.

Like the City of Stockton, the Stockton Unified School District and San Joaquin Delta Community College are in a state of transformation. At the time of the outreach sessions, both were reporting significant shifts in thinking and funding strategies that signaled likely improved outcomes in A-G readiness, SAT participation, FAFSA completion, and graduation rates. San Joaquin Delta Community College was updating curricula for improved workforce alignment and had partnered with Stockton Unified on several dual enrollment and career pathway programs. While no data were available at the time this Report was generated, the number and breadth of programs being implemented were impressive nonetheless.

With limited degree offerings at the Off-Campus Center in Stockton (Stanislaus State Stockton Campus), the location has little impact on addressing enrollment demand, workforce needs, or potential economic transformation. Expansion of the campus to include workforce-aligned, head-of-household job potential would improve the educational and economic impacts.

With expanded course offerings in this location, there is some potential that it would have a negative impact on the local private university, University of the Pacific. Like many other private, liberal arts colleges in the country, University of the Pacific has suffered from enrollment declines and budgetary issues. With an annual cost to enroll greater than $50,000 per year, in comparison to the $12,502 cost of attendance at Stanislaus State, it is generally considered out of reach for most Stockton residents. If there were a local public option, especially one with a direct link to employment, it would have a significant competitive edge over the private alternative.

ALIGNMENT WITH LOCAL INDUSTRY

Stockton has seen tremendous interest in the past several years and strong partnership with national and statewide philanthropic organizations, which have invested heavily in education and other programs related to social equity and mobility. Although stakeholders did not note any specific industry partnerships or industry/philanthropic funding commitments currently anticipated for a new higher education campus, it is likely that philanthropy would be interested in investing in a new or expanded campus at the Stockton University Park site, although the scale of impact may be modest in terms of the scale of capital and operational costs. Stakeholders anticipate that a new campus could attract new businesses and major employers to the region.

LAND AVAILABILITY

In addition to Stockton University Park, Stockton Education and Enterprise Zone, and San Joaquin County Fairground, this Report also provided analysis of sites containing sufficient land area to potentially build a CSU campus for use as a higher education development within the City of Stockton. This Report utilized a variety of sources, including publicly available ArcGIS shapefiles (from city, county, or federal sources), to identify whether there is publicly-owned or privately-owned land within the city, beyond what was previously identified by the State of California, the CSU system, or community stakeholders. The resultant under-developed parcels from the land availability analysis within the City of Stockton are largely under private ownership. This study did identify two parcels owned by the California State Department of

Table 5.12 San Joaquin County Region Higher Education Institutions

Institution	Location	Type	Enrollment (FTES)
Sacramento State	Sacramento	CSU	26,717
Stanislaus State	Turlock	CSU	8,540
Stanislaus State – Stockton Off-Campus Center	Stockton	CSU – Off-Campus Center	219
University of California, Merced	Merced	UC	7,336
San Joaquin Delta Community College	Stockton	Community College	15,097
University of the Pacific	Stockton	Private	3.474

Transportation, including the San Joaquin County Fairground. The study also identified the already selected Stockton University Park as a potential site for evaluation. Maps of these sites are located in Appendix B.5 Land Availability Study. Based on the above findings, no additional sites were included for review within this Report.

CAMPUS ACCESS AND SURROUNDING AREA DENSITY

Stockton University Park, San Joaquin County Fairground, and Stockton Education and Enterprise Zone are accessible to approximately 504,000 people under age 25 within a 45-minute drive at peak commute times, accounting for approximately 64 percent of the overall Upper Central Valley Cluster population.[5] Because of the relatively low density at the periphery of a 45-minute drive time radius from all of the selected sites, there is not a meaningful difference in population between the sites served within a 45-minute drive. The sites are also accessible to only approximately 51,000 people under age 25 within a 45-minute transit commute (except the Stockton Education and Enterprise Zone, which is less transit accessible).[6] Proposed and in-progress rail extensions will potentially expand transit accessibility to new populations in the San Joaquin Valley and toward Livermore and Pleasanton, but specific travel time estimates are not available for these projects. These projects will offer most benefits to the Stockton University Park location, as it is within walking distance of Stockton's primary rail station. As noted previously, extended commutes can be challenging for students, and stakeholders noted that many Stockton-area students do not have a car or cannot afford public transit.

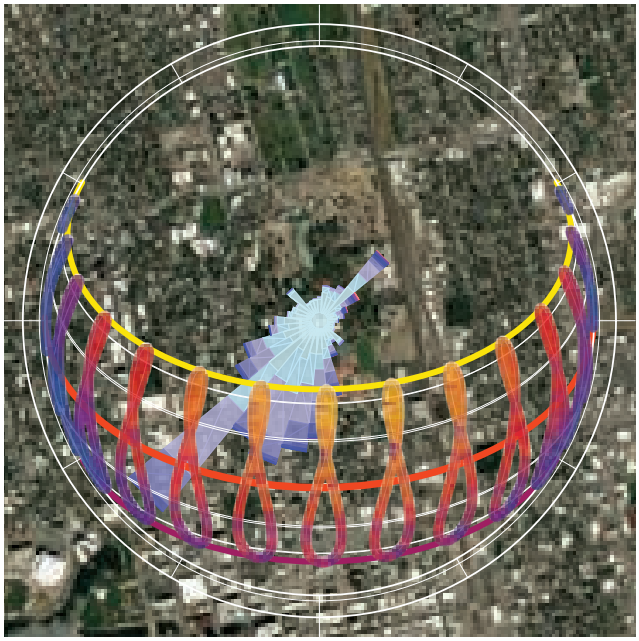
HOUSING AFFORDABILITY

Housing costs in San Joaquin County are substantially lower than elsewhere in the state, although they have increased in recent years in response to out-migration from the Bay Area, where housing affordability is a major issue.[7] The current Stockton Off-Campus Center, Stanislaus State Stockton Campus, is in proximity to modest amounts of medium-density multifamily housing due to its location nearest the city's center. Most housing production in San Joaquin County has been single-family home subdivisions marketed to families, and the majority of housing within a 45-minute commute is composed of single-family homes.

5.5.3 ENVIRONMENTAL SUSTAINABILITY ANALYSIS

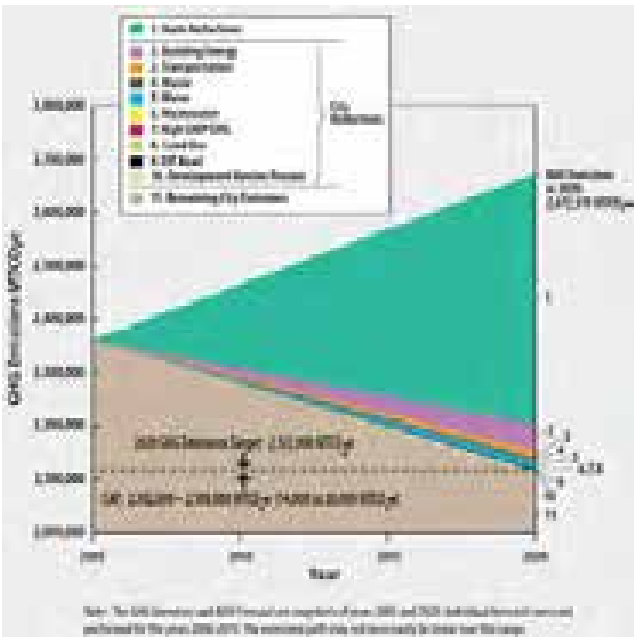
The City of Stockton in San Joaquin County was evaluated for its suitability to advance CSU sustainability criteria across three sites: Stockton University Park, Stockton Education and Enterprise Zone, and San Joaquin County Fairground. Climate, operations, and engagement and resilience have been evaluated at the city scale, in order to determine whether the city's environmental conditions and sustainability approaches comply with CSU Sustainability Policy. Infrastructure analysis was focused on the Stockton University Park site, as the other sites have limited infrastructure improvements to evaluate. For Stockton Education and Enterprise Zone and San Joaquin County Fairground, city and county policies and approaches to infrastructure were evaluated.

Figure 5.13 Stockton Climate



Source: HOK Visualized Climate Analysis. Source: California Energy Commission (2009) and US DOE Energy Plus Weather Data file: Stockton Metro AP 724920 (TMY3)

Figure 5.14 Stockton Metric Tons CO_2 equivalent



Source: ICF International (August 2014). City of Stockton Climate Action Plan.

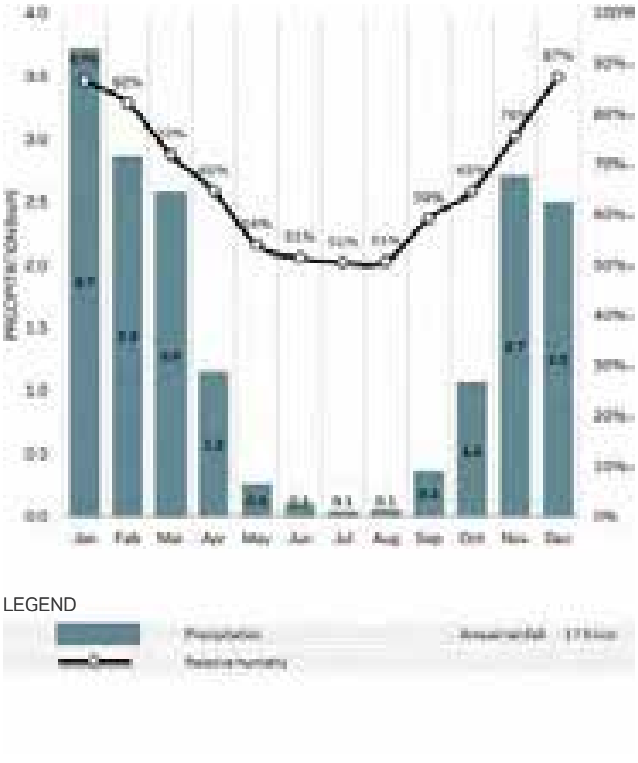
5. Esri ArcGIS Business Analyst (Version 8.1). (2019). American Community Survey socioeconomic profiles. 45-minute drive toward the site on a typical Monday at 8:30 a.m.
6. This Report estimates transit commute times based on existing public transit systems.
7. California Realtors Association. (Q4 2019). Housing Affordability Index.

The City of Stockton lies within a moderate climate to minimize energy infrastructure, provides for a comfortable academic environment, and has minimal resilience challenges, which are addressed by the Climate Action Plan. The city has not established zero net energy (ZNE) goals or specific carbon neutrality goals. The city does not have specific water use reduction goals to align with CSU policy. Green building policies are in line with that of CSU policy. A standard waste policy demonstrates minimum compliance with state regulations. It is an opportune region to provide access to sustainable food systems, but there are no specific policies. The multi-criteria analysis (see Appendix B.2 for additional evaluation of the sustainability criteria) weighs each of these environmental sub-criteria to create an aggregate score concluding that these sites are minimally aligned for campus development. Developing a campus in an existing urbanized area offers infrastructural and transportation efficiencies that are inherently more sustainable than in less dense and greenfield sites.

SITE ECOSYSTEM AND CLIMATE

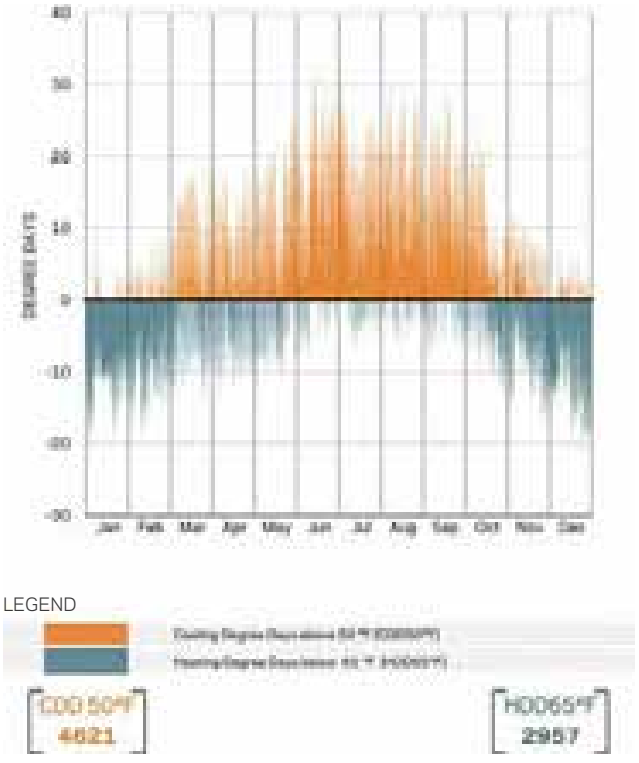
Stockton has a hot-summer Mediterranean climate, characteristic of California's inland valleys, with hot, dry summers and mild winters. Over the course of the year, the temperature typically varies from 39°F to 94°F and is rarely below 30°F or above 103°F. The warm season lasts from June to September, with an average daily high temperature above 86°F. The cool season lasts from November to February, with an average daily high temperature below 62°F. Stockton is typically dry year-round, and humidity rarely causes discomfort. Stockton experiences the most precipitation (17.5 inches per year, on average) between October and May. Mild temperatures and low humidity enable natural ventilation or economizer cycles in buildings for at least 51 percent of the year. Outdoor conditions are mildly cool for outside learning and recreation, with 14 percent of the year comfortable, 70 percent too cool, and 16 percent too warm.

Figure 5.15 Precipitation and Humidity



Source: HOK Visualized Climate Analysis. Source: California Energy Commission (2009) and US DOE Energy Plus Weather Data file: Stockton Metro AP 724920 (TMY3)

Figure 5.16 Heating and Cooling Degree Days



Source: HOK Visualized Climate Analysis. Source: California Energy Commission (2009) and US DOE Energy Plus Weather Data file: Stockton Metro AP 724920 (TMY3)

INFRASTRUCTURE

Energy and Carbon

Stockton University Park – The Stockton University Park campus does not have a central energy management system (EMS). Building energy use intensity (EUI) and operational carbon emissions values can be derived from historical utility bills but are unknown at the time of this Report. Stanislaus State Stockton Campus at University Park is currently located within an existing building and does not have specific EUI reduction or carbon neutrality goals. The City of Stockton Climate Action Plan (CAP) recommends strategies to reduce energy use and carbon emissions but does not provide specific goals or targets. Similarly, the Acacia Court Replacement Feasibility Study recommends that PV systems be installed for on-site power generation, without giving specific power generation recommendations. The Stockton University Park site does not have a central utility plant (CUP), and each building is served by a dedicated heating and cooling plant or packaged HVAC equipment.

Stockton Education and Enterprise Zone and San Joaquin County Fairground – Both the San Joaquin County Fairground and Stockton Education and Enterprise Zone are green field sites with no existing energy infrastructure. Future campus expansions

will have to meet CSU Sustainability Policy, exceeding California Energy Code standards by 10 percent and targeting zero net energy by 2030. It is recommended to incorporate a central building management system, central utility plant, and on-site storage for energy efficiency. The region provides 82.5 kBtu/sf of potential solar power generation capacity on site (using the site's horizontal solar radiation capacity), enabling high viability of on-site renewable energy from rooftop PV systems. The local energy grid has 39 percent of its mix being sourced from renewable sources. Within 10 miles of the site location, there are four solar power plants and one biomass plant that generate 10,000 net MWh of energy per year.

Water

The City of Stockton receives potable water from the California Water Service. The incoming potable water contaminant levels are within acceptable levels, according to the 2018 water quality report. The Chromium-6 level was observed at levels exceeding the California reporting levels, but less than the EPA maximum allowable contaminant level. None of the three identified sites has an existing central irrigation control system. The Stockton University Park site does not have specific water use reduction goals, resulting in the requirement that all three sites would follow the CSU systemwide sustainability goal of 20 percent water use reduction by 2020. There are no on-site rainwater harvesting or water reuse systems or initiatives on the Stockton University Park site, and all new water infrastructure would be required for the Stockton Education and Enterprise Zone and San Joaquin County Fairground.

OPERATIONS AND ENGAGEMENT

Green Building

Stockton University Park campus green building certification requirements are the same as the CSU systemwide requirements: All new buildings and major renovations must meet or exceed LEED Silver equivalency requirements and exceed California Energy Code requirements by 10 percent. The City of Stockton Climate Action Plan encourages green building practices but does not require LEED certification or equivalence. A clear and actionable maintenance and operations plan would also need to be established and updated with an expansion on the Stockton University Park site or in the creation of a campus at Stockton Education and Enterprise Zone or San Joaquin County Fairground. Any expansion of the Stockton University Park site or development of other sites will require new infrastructure, likely including a CUP and distribution piping.

Waste

Stanislaus State and the City of Stockton have no reported diversion rates or published goals for achieving net zero waste. The City of Stockton's 2014 Climate Action Plan set a goal to achieve a 75 percent diversion rate by 2020. The City of Stockton mandates recycling for commercial businesses and provides electronic waste recycling and plastic drop-off locations. Municipal green waste collection is available through the City of Stockton, but no information was available specific to the University Park site. No established programs or policies were found to be in place for waste prevention or reuse.

Sustainable Food Systems

The Stockton University Park site is located in an urban area, with some agriculture-viable land within a two-mile radius, and much more beyond that radius. The downtown Stockton farmers market is located 1.5 miles from the Stockton University Park site. Stanislaus State has no information regarding sustainable food operations policies or initiatives for their campuses. There are no community gardens located at the Stockton University Park site, and no plans to add gardens were found. In the City of Stockton's Sustainable Neighborhood Plan, one of the project priorities is to resurrect large-scale community agriculture to redevelop abandoned/vacant parcels and provide fresh produce to residents. There are a few community gardens throughout the City of Stockton.

CLIMATE ACTION AND ADAPTATION PLANNING

Resilience

The City of Stockton in San Joaquin County is in a California Department of Conservation California Geological Surveyed Zone of low probabilistic seismic hazard (10–30 percent peak ground acceleration). The California Public Utilities Commission (CPUC) indicates that there is low fire risk. FEMA indicates minimal flood hazard potential. Cal-Adapt high emission scenario projections indicate warming potential of up to 5.4°F from baseline by 2050.

Climate Action Planning

In response to statewide requirements, the City of Stockon developed a Climate Action Plan (CAP) in 2014 that aligns with California GHG reduction efforts. The established goal is to reduce GHG emission levels back to 1990 levels by 2020. A GHG inventory was completed in 2011, establishing a 2005 baseline of 2,360,932 metric tonnes of CO2. Stockton's Business as Usual (BAU) emissions for 2020 are estimated at 2,672,519 metric tonnes of CO2. The goal is to achieve 2,122,000 metric tonnes of CO2e (10 percent better than 2005 baseline). This goal is as a near-term 2020 reduction target to understand emission reductions needed to stabilize CO2 emissions by 2050. There is no pronounced zero net energy or carbon goal. The CAP does not address plans for resilience in the face of a changing climate.

Figure 5.17 Stockton University Park Aerial

5.5.4 STOCKTON UNIVERSITY PARK

EXISTING FACILITIES

The CSU has had an education presence in Stockton since 1974—an Off-Campus Center associated with Stanislaus State (Stanislaus State Stockton Campus), located approximately 40 miles away. The Off-Campus Center was initially located downtown in the State of California building. It moved to the Locke Center at San Joaquin Delta Community College in 1981 and to its current location at University Park in 1998. Like CSU Channel Islands, the location is on the site of a former State Hospital. The location is managed by a joint site-authority, Stockton Center Site Authority, which represents a joint powers agency between the City of Stockton and the CSU. In 2004, the Site Authority entered into a contractual arrangement with a master developer, Grupe Commercial Company, which has developed the location for commercial uses, primarily utilized by health care-related functions since that time. Other on-site functions as explained below include a charter high school, a public elementary school, social services, and commercial offices.

The Stanislaus State Stockton Campus Off-Campus Center is located within Acacia Court. Approximately 47,000 SF of the existing 219,000 Acacia Court building has been renovated for academic and administrative use. The renovation of Acacia Court was intended to advance the quality of education for nursing through the addition of an on-site practicum lab and televised connected classrooms to Stanislaus State. The building includes the full spectrum of facilities to support instruction, albeit in small sizes, including (but not limited to) classrooms, labs, administrative offices, library, computer labs, student union, and health services.

PHYSICAL / COMMUNITY

Land Availability	◐
Physical Infrastructure Availability	◐
Campus Access and Surrounding Area Density	○
Housing Availability	●
Access to Community Services and Amenities	●
Environmental Sustainability	○
Regulatory and Environmental Barriers	●

LAND AVAILABILITY

Stockton University Park has 104 acres of land area and 727,000 GSF of existing buildings, some of which are historic and leased to non-University uses. Of the existing buildings, 219,000 GSF are currently in University use, 357,300 GSF are not in University use, and 110,800 GSF are vacant and could be made ready for university use with remodeling and renovations.

Of the total campus area, 45 acres are leased by: 1) Pittman Elementary School; 2) educational/nonprofit uses in Weber Square, including the Alan Short Center and Bertha Knowles Auditorium including Creative Child Care and the Health Careers Academy (HCA) Charter High School; and 3) medical office uses on the northern end of the lake. The Valley Mountain Regional Center is located along Park Street.

Stockton University Park

CURRENT FACILITIES

Figure 5.18 Stockton University Park Current Facilities Site Plan

Table 5.13 Stockton University Park Current Facilities Site Summary

Site Summary Table	
Land Area Campus for Development Scenarios	7,500 FTES Branch Campus = 70 acres
Cluster	Upper Central Valley
Existing Campus Density	Moderate Density
Proposed Campus Density	Moderate Density
Current University Use	**219,000 GSF**
Non-University Use	**357,300 GSF**
Historic - Available	3,000
Non-Historic Available	20,000
Leased	334,300
Vacant	**110,800 GSF**
Historic - Available	110,800
Non-Historic Available	0
Unoccupied	**39,900 GSF**
Total	**727,000 GSF**
Current University Use	219,000
Available	133,800
Leased	334,300
Unoccupied	39,900
Existing Site Land Area	**104 acres**
Developable	28
Leased	45
Existing Campus Greens, Roads and Residual Open Space	31

Note: See Appendix Section B.6 Stockton University Park Site Analysis

Stockton University Park

APPROVED MASTER PLAN 2007 AND ACACIA COURT REPLACEMENT FEASIBILITY STUDY

The CSU Master Plan for the existing Off-Campus Center, approved in 2007, identifies growth for 370,000 GSF of buildings for 1,000 FTES. The recent Acacia Court Replacement Feasibility Study proposes a facility with several acres of surface parking on the northeastern corner of the site, for 1,075 students.

Although current growth in FTES capacity at the Stockton University Park campus has been partly accommodated by extending and intensifying reuse of the Acacia Court Building,[1] a 2019 study concluded that continued renovation was not an optimal strategy.[2] The existing building was not designed to accommodate instructional spaces and generally does not meet current accessibility or sustainability requirements; moreover, resolving these issues is complicated and costly due to the limited capacity of existing electrical infrastructure and the materials used in older construction (lead paint, heavy concrete and masonry, asbestos, etc.).[3] The past study concluded that a new facility, which would allow for consolidation of the instructional, faculty, administrative, and support spaces needed at a contemporary CSU, was the best way to accommodate FTES growth on the site.[4] The development proposal included in the previous study was designed to accommodate 1,075 FTES—their projected demand by 2026-2027—in a 116,000 square foot facility.[5]

LEGEND

- Property Boundary
- Existing Buildings
- Existing Buildings Not in Use
- Existing Transit Line
- P Existing Parking Lot
- P Future Parking Lot
- Future Buildings
- Acacia Court Replacement Feasibility Study Boundary

*Refer to Appendix B.6 for Stockton

N 0 400 800 1600FT

Figure 5.19 Stockton University Park Master Plan and Acacia Court Replacement Feasibility Study

1. Elvyra F. San Juan and Dan Keyser. (May 2019). Attachment B: Project Development and Construction Status Update. Stockton Center Site Authority Board of Directors Meeting. *Meeting Agenda, May 3, 2019.* https://stockton.legistar.com/Calendar.aspx
2. WMB Architects. (2019). *Acacia Court Replacement Feasibility Study.*
3. WMB Architects. (2019). *Acacia Court Replacement Feasibility Study,* 2.
4. WMB Architects. (2019). *Acacia Court Replacement Feasibility Study,* 1.
5. WMB Architects. (2019). *Acacia Court Replacement Feasibility Study.*

Table 5.14 Stockton University Park Site Capacity

Site Capacity	
Enrollment	
Current Capacity	1,069 FTES
Planned Capacity (Approved Master Plan 2007)	1,000 FTES
Planned Capacity (Acacia Court Replacement Feasibility Study)	1,075 Students
Density Metrics	
Current Density	4,228 SF / FTES
Planned Density	4,520 SF / FTES
Current Facilities FAR	0.04

Note: See Appendix Section B.6 Stockton University Park Site Analysis

Table 5.15 Stockton University Park Site Elements

Site Elements	Condition	Potentially Significant	Source
Land capacity criteria			
Steep slopes >20%	None	No	San Joaquin County
Streams	None	No	CA Department of Fish & Wildlife
High tension power lines	None	-	CA Energy Commission
Easements	Data Not Available	-	-
Large tree stands, arboretums or orchards	World Peace Rose Garden	Yes	CSU Site Plans
Agricultural research fields	None	-	CSU Site Plans
Physical resiliency criteria			
Earthquake zones of required investigation			CA Department of Conservation
Landslides	-	No	
Liquefaction	-	No	
Fault lines	-	No	
Probabilistic ground shaking > 40%	Below 40%	No	CA Department of Conservation
Designated agricultural land	None	No	CA Department of Conservation
Local access to agriculture resources > 2 miles	Present	No	Local Harvest
Flood zones	Zone 'X'	No	FEMA
Fire risk zones	Low	No	California Public Utilities Commission

Table 5.16 Stockton University Park Program Summary

Categories	Current Facilities	Approved Master Plan Growth	Acacia Court Replacement Feasibility Study
Academic / Instructional Space	200,000 GSF	- GSF	80,000 GSF
General Administration	- GSF	- GSF	10,000 GSF
Commons (Library + Union)	- GSF	- GSF	10,000 GSF
Auditoria / Performance with Exhibition	- GSF	- GSF	- GSF
Central Plan and Facilities Support	- GSF	- GSF	10,000 GSF
Student Recreation and Wellness	- GSF	- GSF	- GSF
Residential Life / Housing	- GSF	370,000 GSF	190,000 GSF
Recreational Open Space	- SF	- SF	- SF
Structured Garages	- GSF	- GSF	- GSF
Surface Lots	- SF	310,000 SF	300,000 SF
Total	**200,000 GSF**	**680,000 GSF**	**600,000 GSF**

Source: EIP Associates. (16 May 2003). *University Park Master Development Plan Administrative Draft #2*, 4.3.

Stockton University Park

REDEVELOPMENT PHASE ONE - BASED ON LEASE TERMS ENDING IN 2030

Stockton University Park has many long-term leases with repeating options to renew at set 3-10-year increments. Due to these leases, some of which have renewal options that extend past the year 2053, a three-phased redevelopment approach was explored. Three maps and corresponding tables are provided to describe the land availability at each phase.

Redevelopment Phase One – Based on Lease Terms Ending in 2030

This phase maintains most historic buildings, considering for demolition the eastern and western wings of Acacia Court, the vacant Eucalyptus and Sequoia Halls on the south and east side of the lake, and a portion of the Aspen Center. It considers existing leases that have renewal options by the year 2030 as possible building renovations towards academic functions, for a total of 448,000 GSF available for potential University use. The possibility for larger site redevelopment occurs largely along the rail line in the northeast corner of the site and just south of Weber Square, where the existing Bread of Life building has been proposed for demolition, totaling 47 acres. These unencumbered land areas could be rebuilt to accommodate additional program needs towards a 7,500 FTES Branch Campus.

The resulting concentration of University uses along the eastern half of the total property enables a much more contiguous physical campus and cohesive student experience. Access to these areas would be served primarily from the E Harding Way entrance. Special consideration of the design of the campus and its open spaces will be critical to the success of this phase, as this part of the site is adjacent to the rail lines.

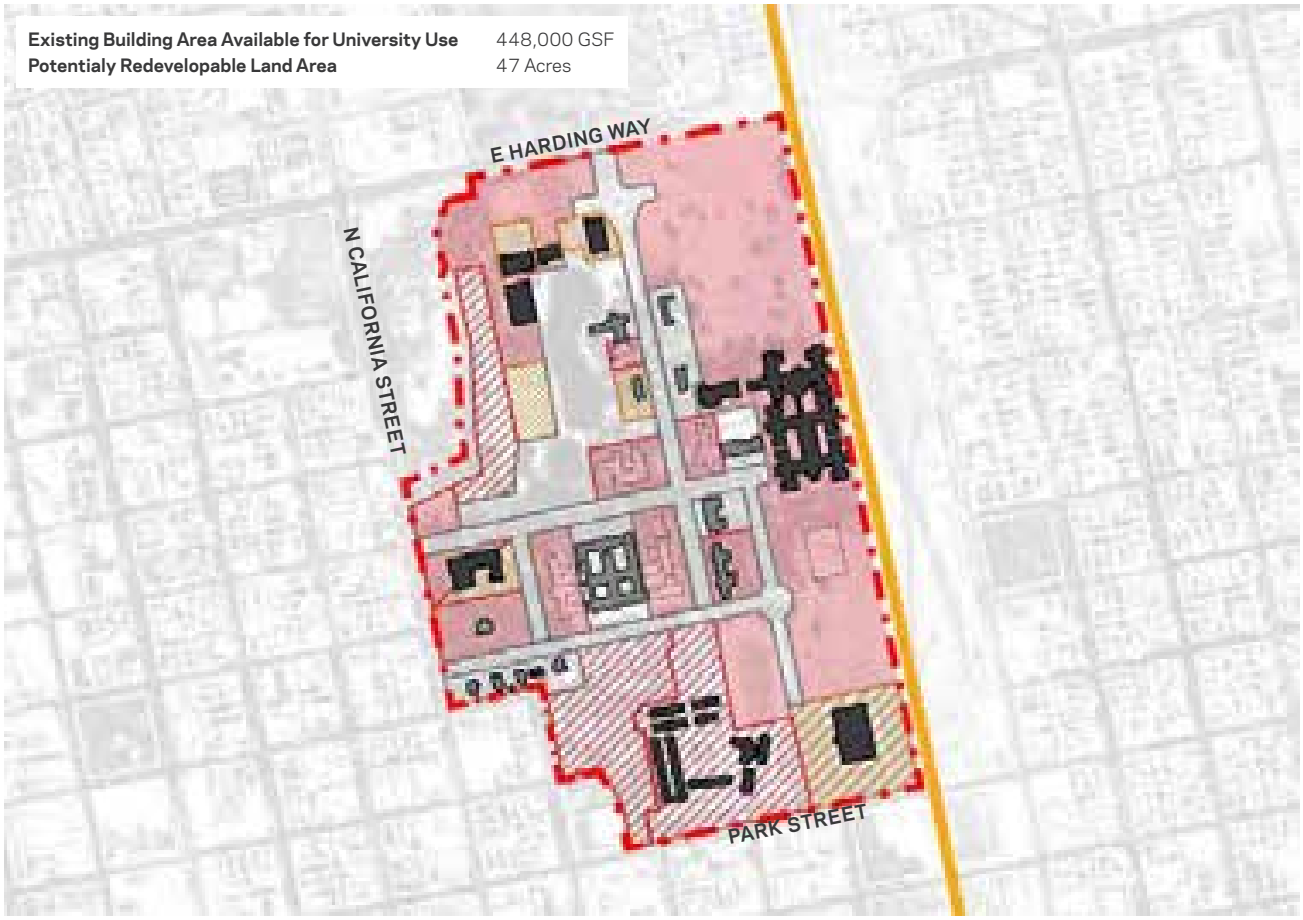


Figure 5.20 Stockton University Park - Redevelopment Phase One - Based on Lease Terms Ending in 2030

Table 5.17 Stockton University Park - Redevelopment Phase One - Available Land and Existing Building Area Summary

Redevelopment Phase 1 - Estimated Year 2030 Summary	
Current University Use	**159,900 GSF**
Non-University Use	**337,300 GSF**
Historic - Available	22,300
Non-Historic Available	190,500
Leased	144,500
Vacant	**95,300 GSF**
Historic - Available	95,300
Non-Historic Available	0
Proposed Demolition	**134,500 GSF**
Total	**727,000 GSF**
Current University Use	159,900
Available	288,100
Leased	144,500
Proposed Demolition	134,500
Site Land Area	**104 acres**
Developable	47
Leased	26
Existing Campus Greens, Roads and Residual Open Space	31

Note: See Appendix Section B.6 Stockton University Park Site Analysis

Stockton University Park

REDEVELOPMENT PHASE TWO - BASED ON LEASE TERMS ENDING IN 2040

Redevelopment Phase Two – Based on Lease Terms Ending in 2040

This phase maintains the remaining historic buildings from Phase One and considers existing leases that are set to expire or have renewal options by the year 2040 as possible building renovations towards academic functions. Reclaiming these previously leased buildings for University use increases the building area for University use from 448,000 GSF to a total of 536,000 GSF. The possibility for larger site redevelopment grows as additional lease area becomes available for potential University facilities to a total of 56 acres, which could be further rebuilt to accommodate additional program needs towards a 7,500 FTES Branch Campus. Given the site's existing infrastructure (roads) and open spaces (campus green areas around the lake), there may be enough acreage in this phase for the entirety of the academic program buildings, student support spaces, and administration (identified as Occupied Facilities on Table 5.18). However, there would be limited area for surface parking, and parking structures or off-campus surface lots would likely be needed. Further study of land use options would be required.

The resulting University campus in this phase is defined by westward and southward growth. The University campus in this phase now encompasses the lake and extends south to Park Street, enabling a new potential southern gateway and identity. In addition, during this phase the University occupies the majority of the northern half of the property, further supporting the ability to create a complete campus character, identity, and sense of place to elevate the student experience.

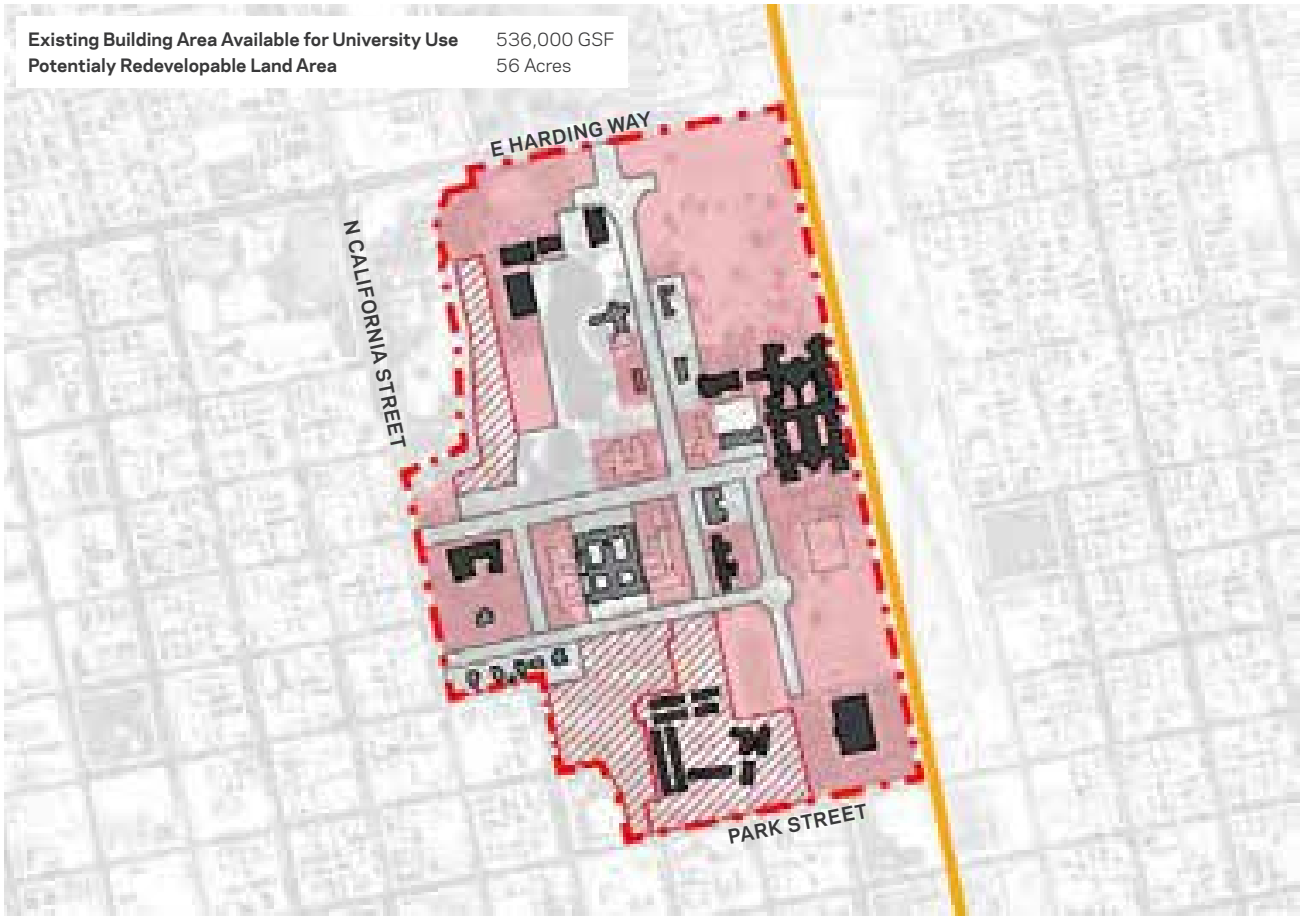


Figure 5.21 Stockton University Park - Redevelopment Phase Two - Based on Lease Terms Ending in 2040

Table 5.18 Stockton University Park - Redevelopment Phase Two - Available Land and Existing Building Area Summary

Redevelopment Phase 2 - Estimated Year 2040 Summary	
Current University Use	**159,900 GSF**
Non-University Use	**337,300 GSF**
Historic - Available	28,500
Non-Historic Available	272,300
Leased	56,500
Vacant	**95,300 GSF**
Historic - Available	95,300
Non-Historic Available	0
Proposed Demolition	**0 GSF**
Total	**592,500 GSF**
Current University Use	159,900
Available	376,100
Leased	56,500
Proposed Demolition	0
Site Land Area	**104 acres**
Developable	56
Leased	17
Existing Campus Greens, Roads and Residual Open Space	31

Note: See Appendix Section B.6 Stockton University Park Site Analysis

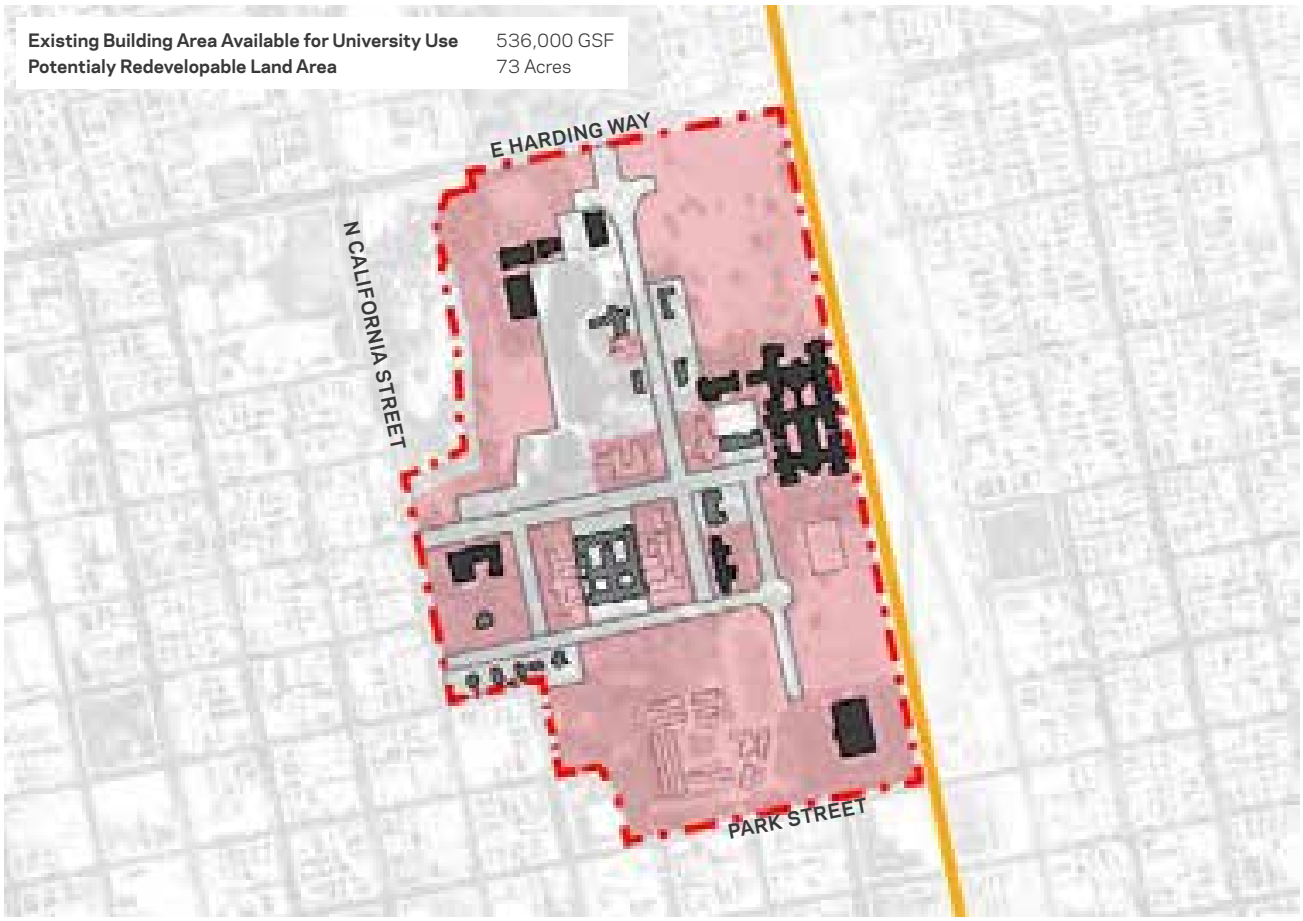
Stockton University Park

REDEVELOPMENT PHASE THREE - BASED ON LEASE TERMS ENDING IN 2053+

Redevelopment Phase Three – Based on Lease Terms Ending in 2053+

This phase maintains the remaining historic buildings from Phase Two and considers existing leases that are set to expire or have renewal options by the year 2053 and beyond as possible building renovations toward academic functions, for a total of 592,500 GSF available for potential University use. The possibility for larger site redevelopment grows as additional lease area becomes available for potential redevelopment, for a total of 73 acres, which could be further densified to accommodate additional program needs towards a 7,500 FTES Branch Campus. The moderate-density Branch Campus development scenario requires approximately 70 acres, of which 55 acres are for Non-Occupied Facilities. Because Stockton University Park's 31 acres of roads, campus green areas, and some surface parking have been maintained, this phase would provide sufficient, unencumbered land to accommodate the academic program buildings, student support spaces, and administration (identified as Occupied Facilities in Table 5.20), as well as some additional area of surface or structured parking and possibly recreational fields (identified as Non-Occupied Facilities in Table 5.20), for a 7,500 FTES Branch Campus development scenario.

The resulting University campus in this phase and beyond is one defined by clear campus edges, gateways, special places (lakes, open spaces), and precincts commonly found at CSU campuses.



*Refer to Appendix B.6 for Stockton

Figure 5.22 Stockton University Park - Redevelopment Phase Three - Based on Lease Terms Ending in 2053+

Table 5.19 Stockton University Park - Redevelopment Phase Three - Available Land and Existing Building Area Summary

Redevelopment Phase 3 - Estimated Year 2053+ Summary	
Current University Use	**159,900 GSF**
Non-University Use	**280,800 GSF**
Historic - Available	28,500
Non-Historic Available	252,300
Leased	0
Vacant	**95,300 GSF**
Historic - Available	95,300
Non-Historic Available	0
Proposed Demolition	**56,500 GSF**
Total	**592,500 GSF**
Current University Use	159,900
Available	376,100
Leased	0
Proposed Demolition	56,500
Site Land Area	**104 acres**
Developable	73
Leased	0
Existing Campus Greens, Roads and Residual Open Space	31

Note: See Appendix Section B.6 Stockton University Park Site Analysis

Table 5.20 Stockton University Park Phase Three Land Area

Land Areas for Program Categories	7,500 FTES Branch Campus	Phase 3 Stockton University Park
Academic Program	**2,135,000 GSF**	
Total Land Area	**70 acres**	**104 acres**
Occupied Facilities	**15**	*Approximately* **15**
Academic / Instructional Space	5	*Further Study Required*
General Administration	1	*Further Study Required*
Commons (Library + Union)	2	*Further Study Required*
Auditoria + Performance with Exhibition	0	*Further Study Required*
Student Recreation + Wellness	1	*Further Study Required*
Residential Life + Housing	3	*Further Study Required*
Central Plant + Facilities Support	3	*Further Study Required*
Non-Occupied Facilities	**55**	**31** + *Future Surface Parking*
Infrastructure	22	11 + *Future Surface Parking*
Roads	4	11
Surface Parking Footprints	18	*Further Study Required*
Structured Parking Footprints	0	0
Open Space	33	*Approximately* 23
Recreational Fields	7	0
Athletic Fields	0	0
Campus Green Area	6	8
Residual Open Space	20	12

PHYSICAL INFRASTRUCTURE AVAILABILITY

This site is currently in an urban, built-up area with existing infrastructure serving the University Park development. The site could require demolition of existing structures, existing building renovations, and associated infrastructure improvements commensurate with FTES and facilities growth.

SOIL/GEOTECHNICAL

Site development for Stockton University Park will require a moderate amount of clearing, grading, and cut and fill earthwork.

TRANSPORTATION

Stockton is served by an Amtrak regional rail connection, connecting Stockton to Sacramento, Emeryville, and Bakersfield, along with many other locations in California's Central Valley through the state-funded San Joaquin service, which offers seven daily round trips and connecting bus services, with plans to add two additional round-trip trains from Sacramento via Stockton to Fresno or Bakersfield. Five of these round-trips stop at the Stockton San Joaquin Station, which is 1.6 miles from Stockton University Park. By 2022, four round trips will stop at the Cabral Station, which is less than one mile from Stockton University Park. Stakeholders noted that while the city currently has no plans to extend bus rapid transit (BRT) service to the site, it would be possible to do so in the future.

The Cabral Station is also served by the Altamont Corridor Express (ACE) commuter rail service, currently connecting Stockton to San José via Tracy and Livermore. The Valley Rail project will expand ACE service north to Sacramento by 2021, south to Ceres by 2023, and on to Merced by 2027, where it will connect to the California High-Speed Rail Initial Operating Segment.

The Final EIR for the CSU Campus University Park Master Development Plan (MDP) environmentally cleared transportation impacts for development of facilities for higher education and non-educational uses consistent with the MDP. Further build-out of the MDP would require completion of mitigations included in the EIR, and further research is needed to identify remaining mitigations. If the CSU seeks to expand outside of the MDP, or for non-educational uses that are inconsistent with the MDP, transportation system mitigations like installing signalized intersections and restriping to accommodate turn lanes may be required. Overall, it is expected that the cost, effort, and time associated with transportation mitigations to accommodate CSU expansion at this site will be moderate in comparison to other sites.

INFRASTRUCTURE SYSTEMS

Although the University Park site has an existing central utility plant (CUP) for the provision of heating and air conditioning,[1] further development of the site will require augmentation and expansion of existing power, water, recycled water, and wastewater systems.

As part of the Acacia Court Replacement Feasibility Study, the 13.5-acre northeast corner of University Park was described as having on-site utility extensions for storm water and domestic water stubbed to the proposed area of redevelopment for Acacia Court Replacement, and sanitary sewer is located in North Grand Street, immediately adjacent to the proposed northeast corner site.

Figure 5.23 Valley Rail Service Plan

Source: San Joaquin Regional Rail Commission. (2020). Altamont Corridor Express: Valley Rail Service Plan. https://acerail.com/valley_rail/

Water

Water service is provided to the existing site by California Water Service Company. There is an existing 8-inch loop with several existing points of connection to the new campus from the adjacent N. California Street, E. Harding Way, N. Union Street, and E. Park Street. Additionally, there are several public water lines within the new campus boundaries, including an 8-inch line both on the northern and southern portions of the campus and an 8-inch that bisects the campus connecting California Avenue and Union Street. The proposed development would require minor off-site improvements to infrastructure, including new meters and backflow preventers to the proposed buildings and some on-site rerouting of existing water lines, including the 8-inch in the northern portion of the campus. Reclaimed water is permissible, but there is no existing infrastructure to support it. The City of Stockton has discussed implementing a city-wide reclaimed water system in the future. Based on fire flow and building heights, we anticipate booster pumps may be required to achieve required building fire flows. A fire flow test was obtained from the City of Stockton Municipal Utilities Department at a hydrant located adjacent to the campus on the 8-inch Magnolia Street line.

Sanitary

Sanitary sewer infrastructure for this area is operated by the Stockton Municipal Utilities Department. Existing infrastructure includes a 12-inch sewer in N. Union Street and several 6-inch and 8-inch sewers along N. California Street. The proposed development would require some minor off-site improvements

1. Julien J. Studley, Inc. and Metropolitan West Financial and Strategic Services, LLC. (April 2000). *Feasibility Study for Development of CSU Stanislaus – Stockton Center.*

to infrastructure, including new manholes and sewer extensions and some minor on-site improvements including new manholes, cleanouts, and extensions to the proposed buildings There are two private lift stations on site, which would imply the surrounding sewer is relatively shallow, and gravity flow from proposed buildings might be an issue and could also possibly require new lift stations in order for buildings to be served.

Storm

Storm sewer infrastructure for this area is operated by the Stockton Municipal Utilities Department. Stormwater for the existing site appears to be collected and treated by an on-site detention pond. Other existing infrastructure includes a 36-inch RCP that connects to a 54-inch RCP located in E. Harding Way. The proposed development would require some on-site improvements to the existing stormwater treatment system, including possible pond enlargement, storm inlets and pipes, and minor off-site improvements to infrastructure, including new manholes. There are several stormwater treatment methods that would entail varying scopes of work for both on-site and off-site infrastructure.

ACCESS TO COMMUNITY SERVICES AND AMENITIES

The Stockton University Park site has a moderately high Walk Score of 75, meaning that most errands can be accomplished by students and faculty on foot. Its Transit Score is 29, indicating that there are few nearby public transportation options, and its Bike Score of 74 reveals that biking is convenient for most trips based on the amount of cycling infrastructure today. These results are based on the currently possible 20-minute walk from the site's entry at approximately 501 East Magnolia Street into the surrounding neighborhoods, which contain a very high number of publicly accessible parks and grocery stores and a high number of dining establishments, everyday errand and shopping opportunities, and cultural and entertainment venues.

The City of Stockton has been awarded the National Civic League's "All America City" award five times, in 1999, 2004, 2015, 2017, and 2018. The All-America City Award recognizes communities that leverage civic engagement, collaboration, inclusiveness, and innovation to successfully address local issues. The 2018 All-America City competition focused on equity and collaborative approaches toward addressing issues impacting the city. Work being done by Reinvent Stockton, Stockton Scholars, and the Little Manila Center's "Us History" program was what made Stockton a finalist.[2] In addition to these initiatives, the ongoing downtown revitalization projects, including Minor Street, point to a pattern of strong civic collaboration and redevelopment success. Denser, urban sites can provide a myriad of benefits to a university's campus experience, through increased walkability and a decidedly urban sense of place. But without high-frequency transit service, these same sites can be more difficult for single-occupant vehicle commuters. The Stockton University Park site currently provides the highest access to student-supporting amenities and community services of any of the sites evaluated, due to the completeness of the surrounding urbanized context.

REGULATORY AND ENVIRONMENTAL BARRIERS

The Stockton University Park campus site is governed by a Joint Powers Authority (JPA) between the City of Stockton and the CSU and within the boundaries of the University Park Master Development Plan (MDP), for which a Final EIR was certified in 2003. The MDP's FEIR provided environmental clearance for approximately 26 acres for educational uses to accommodate approximately 1,000 students, 21 acres for student housing, 26 acres for office use, and five acres for commercial/retail use.

The City of Stockton's General Plan Land Use identifies the University Park property as "Mixed Use," which allows for a mixture of compatible land uses including residential, administrative and professional offices, retail and service, industrial, and public and quasi-public facilities, as determined through a master development plan. The minimum development size is 100 acres and the maximum FAR is 0.5.[3] It is currently Zoned as "MX - Mixed Use." The site is within an Opportunity Zone, a new federal tool for community development that provides tax incentives for private investment in designated areas. While it is assumed that the CSU would not see direct fiscal benefit from these incentives, businesses attracted to co-locating with or near the CSU would.

The CSU may approve development consistent with the mission of higher education. For non-educational uses, if they are consistent with the MDP, the Community Development Director may approve these projects in a process that is expected to take approximately one to two months. If they are not consistent with the MDP, amendments to the MDP and City of Stockton General Plan and/or development of a CSU campus Master Plan would be required. An Addendum is expected to take four to six months to process, and an EIR for a CSU campus Master Plan is expected to take approximately 12 to 18 months, but may be streamlined by applicable CEQA exemptions. Potential impacts may require further site-specific investigation, especially related to transportation, cultural resources, air quality, and noise—it is expected that these impacts can be mitigated. Overall, anticipated CEQA clearance for new entitlements in Stockton University Park is expected to be quick and easy relative to other potential project sites.

2. Nicholas Filipas. Stockton Goes back-to-Back as an All-America City. (3 June 2020.) Recordnet.com. 25 June 2018. https://www.recordnet.com/news/20180625/stockton-goes-back-to-back-as-all-america-city
3. Envision Stockton 2040 General Plan. Adopted December 4, 2018. http://stocktongov.com/files/Adopted_Plan.pdf

Figure 5.24 San Joaquin County Fairground Aerial

5.5.5 SAN JOAQUIN COUNTY FAIRGROUND

PHYSICAL / COMMUNITY

Land Availability	●
Physical Infrastructure Availability	◐
Campus Access and Surrounding Area Density	○
Housing Availability	●
Access to Community Services and Amenities	◐
Environmental Sustainability	○
Regulatory and Environmental Barriers	○

LAND AVAILABILITY

The San Joaquin County Fairground is owned by California State Department of Transportation, District 10, and consists of approximately 180 acres in area. The site has no Master Plan for redevelopment. City stakeholders identified during engagement sessions suggested that the entire site could be utilized for CSU purposes.

A moderate-density 7,500 FTES Traditional or Branch Campus development scenario requires approximately 70 acres. There is enough unencumbered, available land on the site to accommodate a moderate-density 7,500 FTES campus development scenario.

A moderate-density 15,000 FTES Traditional or Branch Campus development scenario requires approximately 130 acres. There is enough unencumbered, available land on the site to accommodate a moderate-density 15,000 FTES campus development scenario.

PHYSICAL INFRASTRUCTURE AVAILABILITY

This site is in an urban, built-up area and has a lot of existing infrastructure. The site will require some demolition of structures and infrastructure improvements.

SOIL/GEOTECHNICAL

Site development for San Joaquin County Fairground will require a moderate amount of clearing, grading, and cut and fill earthwork. There are no EIRs available for the Fairground, so the suitability of soil and geotechnical conditions for construction remain undetermined for this Report.

TRANSPORTATION

San Joaquin County Fairground is served with some bus transit today and the all-electric Route 49 Bus Rapid Transit, called Metro Express, operated by San Joaquin RTD. The site is 1.4 miles from the Stockton San Joaquin Station, served by five round-trip trains between Bakersfield and Oakland. It is 1.7 miles from the Cabral Station, served by ACE commuter trains, which by 2021 will offer service to Sacramento, by 2027 will offer service to Merced, and currently operates trains to San José. The City has no plans for additional transit infrastructure to this location at the time of this Report. A project-level EIR is recommended for this site, and it is expected that mitigation for transportation impacts may include improvements for access, signalized intersections, and re-striping of roadways to accommodate turning lanes and people who walk and bike. Overall, it is expected that the cost, effort, and time associated with transportation mitigations to accommodate CSU expansion at this site will be moderate in comparison to other sites.

INFRASTRUCTURE SYSTEMS

The San Joaquin County Fairground site will require power, water, recycled water, and wastewater infrastructure to support development of the site.

Water

Water service is provided to the existing site by California Water Service Company. There are several points of connection from a 12-inch steel pipe along S. Airport Way. Proposed development would require some on-site improvements to infrastructure, including new meters and backflow preventers to the proposed buildings, and minor off-site improvements to infrastructure. Reclaimed water is permissible, but there is no existing infrastructure to support it. The City of Stockton has discussed implementing a city-wide reclaimed water system in the near future. Based on fire flow and building heights, we anticipate booster pumps may be required to achieve required building fire flows. A fire flow test was obtained from the City of Stockton Municipal Utilities Department at a hydrant located on the 12-inch line at the southwest corner of Airport Way and Folsom.

Sanitary

Sanitary sewer infrastructure for this area is operated by the Stockton Municipal Utilities Department. There is a sanitary line running through the site, ranging from 6-inch to 12-inch in size. There is also an 8-inch service near Dr. Martin Luther King Jr. Blvd. It appears the existing sewer infrastructure is all gravity, as there are no private lift stations located onsite. The proposed development would require some on-site improvements, including new laterals to the proposed buildings along with manholes and cleanouts, and minor off-site improvements to infrastructure, including possible new points of connection.

Storm

Storm sewer infrastructure for this area is operated by the Stockton Municipal Utilities Department. Stormwater for the existing site is collected through a series of pipes and inlets that discharge into Mormon Slough, located just north of the site. For the proposed development, a drainage study would need to be performed for Mormon Slough to ensure it has enough capacity for the additional drainage runoff. The proposed development would require on-site improvements such as stormwater quality treatment and retention, storm inlets and improved storm conveyance system, and minor off-site improvements to infrastructure. There are several stormwater treatment methods that would entail varying scopes of work for both on-site and off-site infrastructure.

ACCESS TO COMMUNITY SERVICES AND AMENITIES

The San Joaquin County Fairground site has an existing Walk Score of 48, meaning that the site is currently car dependent and most errands require a car. Its Transit Score is 29, meaning there are few nearby public transportation options, and its Bike Score of 43 reveals that the site is somewhat bikeable due to currently having minimal cycling infrastructure. These results are based on the currently possible 20-minute walk from the site's entry at Fairgrounds Drive into the surrounding neighborhoods, which contain a high number of publicly accessible parks and grocery establishments, a moderate number of shopping opportunities, cultural and entertainment venues and schools, and some everyday errand opportunities. The San Joaquin County Fairground site currently has no Master Plan to improve its built environment.

REGULATORY AND ENVIRONMENTAL BARRIERS

The subject site's location is designated in the City's 2035 General Plan as Institutional and zoned as Public Facilities (PF), which permits public colleges. If the potential new campus expansion as contemplated by the CSU at this location is consistent with the Development Code (maximum FAR 0.5, up to 87 dwelling units per acre, maximum 50 percent site coverage, maximum height limit of 75 ft, parking space 1/classroom + 0.75 per student in largest shift on site at one time), then no entitlement amendments would be necessary. If the project is not consistent, it is recommended that the CSU act as the lead agency to development a CSU campus Master Plan to streamline future efforts.

The site is within an Opportunity Zone, a new federal tool for community development that provides tax incentives for investment in designated areas. It is assumed that the CSU would not directly benefit from these incentives, but that any businesses co-locating might.

Because there is no project-level environmental clearance for development at this site, an EIR for a CSU campus Master Plan would be necessary, which is expected to take 18 to 24 months to process, but it may be streamlined by applicable CEQA exemptions. Noteworthy potential impacts for this site include impacts to biological resources, transportation, water quality, hazardous waste, light and glare, floodplain, air quality, and noise. It is expected that these impacts can be mitigated. Overall, anticipated project-level CEQA clearance for new entitlements at the San Joaquin County Fairground is expected to be difficult and time consuming, relative to other potential project sites.

San Joaquin County Fairground

UPPER CENTRAL VALLEY CLUSTER

Figure 5.25 San Joaquin County Fairground - Site Area Evaluation Plan

Table 5.21 San Joaquin County Fairground Site Summary

Site Summary Table	
Land Area for Campus Development Scenarios	7,500 FTES Traditional Campus = 70 acres,
	15,000 FTES Traditional Campus = 130 acres
Cluster	Upper Central Valley
Existing Campus Density	Low Density
Proposed Campus Density	Moderate Density
Existing Site Land Area	**180 acres**
Total Designated Land Area for University Use	0
Steep Slopes (over 20%) or Other Significant Conditions	0
Resulting Site Are for University Use	180
Implementation / Pre-Construction Status (EIR/ no EIR)	No EIR

Source: San Joaquin County Community Development Geographic Information Systems. (2020). Cadastral: Parcels. https://sjmap.org/GISDataDownload.html

Table 5.22 San Joaquin County Fairground Site Elements

Site Elements	Condition	Potentially Significant	Source
Land capacity criteria			
Steep slopes >20%	None	No	San Joaquin County
Streams	None	No	CA Department of Fish & Wildlife
High tension power lines	None	-	CA Energy Commission
Easements	Data Not Available	-	-
Large tree stands, arboretums or orchards	None	-	-
Agricultural research fields	None	-	-
Physical resiliency criteria			
Earthquake zones of required investigation			CA Department of Conservation
Landslides	-	No	
Liquefaction	-	No	
Fault lines	-	No	
Probabilistic ground shaking > 40%	Below 40%	No	CA Department of Conservation
Designated agricultural land	None	No	CA Department of Conservation
Local access to agriculture resources > 2 miles	Present	No	Local Harvest
Flood zones	Zone 'X'	No	FEMA
Fire risk zones	Low	No	California Public Utilities Commission

Figure 5.26 Stockton Education and Enterprise Zone Aerial

5.5.6 STOCKTON EDUCATION AND ENTERPRISE ZONE

PHYSICAL / COMMUNITY

Land Availability	●
Physical Infrastructure Availability	◐
Campus Access and Surrounding Area Density	○
Housing Availability	●
Access to Community Services and Amenities	○
Environmental Sustainability	○
Regulatory and Environmental Barriers	○

LAND AVAILABILITY

The Stockton Education and Enterprise Zone is owned by the Alex and Faye Spanos Family Trust and consists of approximately 3,783 acres. It is assumed that any portion of the site could be utilized for CSU purposes. There are lands designated as Prime Farmland and Farmland of Statewide Importance within the site, but it is possible to site a new campus without developing these important agricultural resources.

A low-density 7,500 FTES Traditional Campus development scenario requires approximately 100 acres. There is enough unencumbered, available land on the site to accommodate a moderate-density 7,500 FTES campus model.

A low-density 15,000 FTES Traditional Campus development scenario requires approximately 200 acres. There is enough unencumbered, available land on the site to accommodate a moderate-density 15,000 FTES campus model.

PHYSICAL INFRASTRUCTURE AVAILABILITY

This site is currently in a greenfield site and has no existing infrastructure.

SOIL/GEOTECHNICAL

Site development for the Stockton Education and Enterprise Zone site will require a moderate amount of clearing, grading, and cut and fill earthwork. There are no EIRs available for the Enterprise Zone, so the suitability of soil and geotechnical conditions for construction remain undetermined for this Report.

TRANSPORTATION

The Stockton Education and Enterprise Zone site is served by no existing transit infrastructure and the City has no plans for additional transit infrastructure at this time. The site is approximately 3.5 miles from the proposed south alternative Lodi Station for ACE Valley Rail commuter trains, which are to start service by 2022.[1]

This site is bisected by Interstate 5, and Thornton and Eight Mile roads are rural two-lane roads that serve the site. Thornton Road is being widened to accommodate six vehicle lanes plus bicycle lanes. A project-level EIR is recommended for this site, and transportation system improvements expected to be required for CSU expansion at this site include installation of signalized intersections, bicycle and pedestrian access improvements, expanding the rural road network, and improvements to the Interstate 5 / Eight Mile Road interchange. Overall, it is expected that the cost, effort, and time associated with transportation mitigations to accommodate CSU expansion at this site will be substantial in comparison to other sites.

INFRASTRUCTURE SYSTEMS

The Stockton Education and Enterprise Zone site will require power, water, recycled water, and wastewater infrastructure to support development of the site.

Water

There is currently no water service to this site located above 8 Mile Road. The site is located outside of the California Water Service Company boundary. However, the City of Stockton would be

1. AECOM, San Joaquin Regional Rail Commission, Valley Rail Sacramento Extension Project DEIR Vol. 1, 2020

willing to provide water service if the existing infrastructure were improved. Reclaimed water is permissible but there is no existing infrastructure to support it. The City of Stockton has discussed implementing a city-wide reclaimed water system in the near future. The proposed development would require both major on-site and off-site improvements to infrastructure, including new service extensions, meters, and backflow preventers to the proposed buildings. Based on fire flow and building heights, we anticipate booster pumps may be required to achieve required building fire flows. A fire flow test was obtained from the City of Stockton Municipal Utilities Department at a hydrant located nearest to the site on the 12-inch line located at the northwest corner of Scotts Street Drive and Regatta Lane.

Sanitary

There is currently no sanitary sewer infrastructure for this area, which is located outside of the Stockton Municipal Utilities Department service area. The City of Stockton would be willing to service this area if existing infrastructure were improved as part of the project. The proposed development would require both major on-site and off-site improvements to infrastructure, including new service extensions to the entire site and proposed buildings as well as manholes, cleanouts, and possible lift stations.

Storm

There is currently no storm sewer infrastructure for this area, which is located outside of the Stockton Municipal Utilities Department service area. The City of Stockton would be willing to service this area if existing infrastructure were improved as part of the project. The proposed development would require major on-site and off-site improvements to infrastructure, including a master stormwater treatment system with storm inlets and pipe conveyance systems.

ACCESS TO COMMUNITY SERVICES AND AMENITIES

The Stockton Education and Enterprise Zone site has an existing Walk Score of 3, meaning that the site is entirely car dependent and all errands require a car. Its Transit Score is 0, meaning it is impossible to get on a bus, and its Bike Score of 52 reveals that the site is bikeable and has some bicycling infrastructure today. These results are based on the currently possible 20-minute walk from the site's entry at approximately 10924 Thornton Road into the surrounding neighborhoods, which contain a moderate number of nearby publicly accessible parks, a school, and almost no dining establishments, cultural and entertainment venues, everyday errand and shopping opportunities or grocery stores. The Stockton Education and Enterprise Zone site currently has no Master Plan to improve its built environment.

REGULATORY AND ENVIRONMENTAL BARRIERS

The potential site is in unincorporated San Joaquin County, adjacent to Interstate 5, which is designated as Agricultural/ Urban Reserve (A/UR) land use—land identified in the County's General Plan for urban development beyond 2035. This location is designated as an Economic and Education Enterprise in the City of Stockton's General Plan, which is intended to support the City's economic development goals by attracting new businesses, industries, and/or educational institutions that provide high-quality jobs to the local workforce. The maximum anticipated FAR is 0.6, though the designation allows variation from these standards with City approval if necessary, to achieve the City's economic development goals and complete community goals. The site is outside of Stockton City limits so is not currently zoned by the City. The City does have housing restrictions north of Eight Mile Road, but these restrictions do not apply to supportive housing for university uses, such as dormitories. Under County jurisdiction, if initiated by a private developer, developing a CSU campus on this site would require a General Plan Amendment and rezoning. If the land is annexed into the City, the site would require Local Agency Formation Commission (LAFCO) approval for annexation into the City of Stockton and amendments to the City's Eight Mile Road Precise Plan.

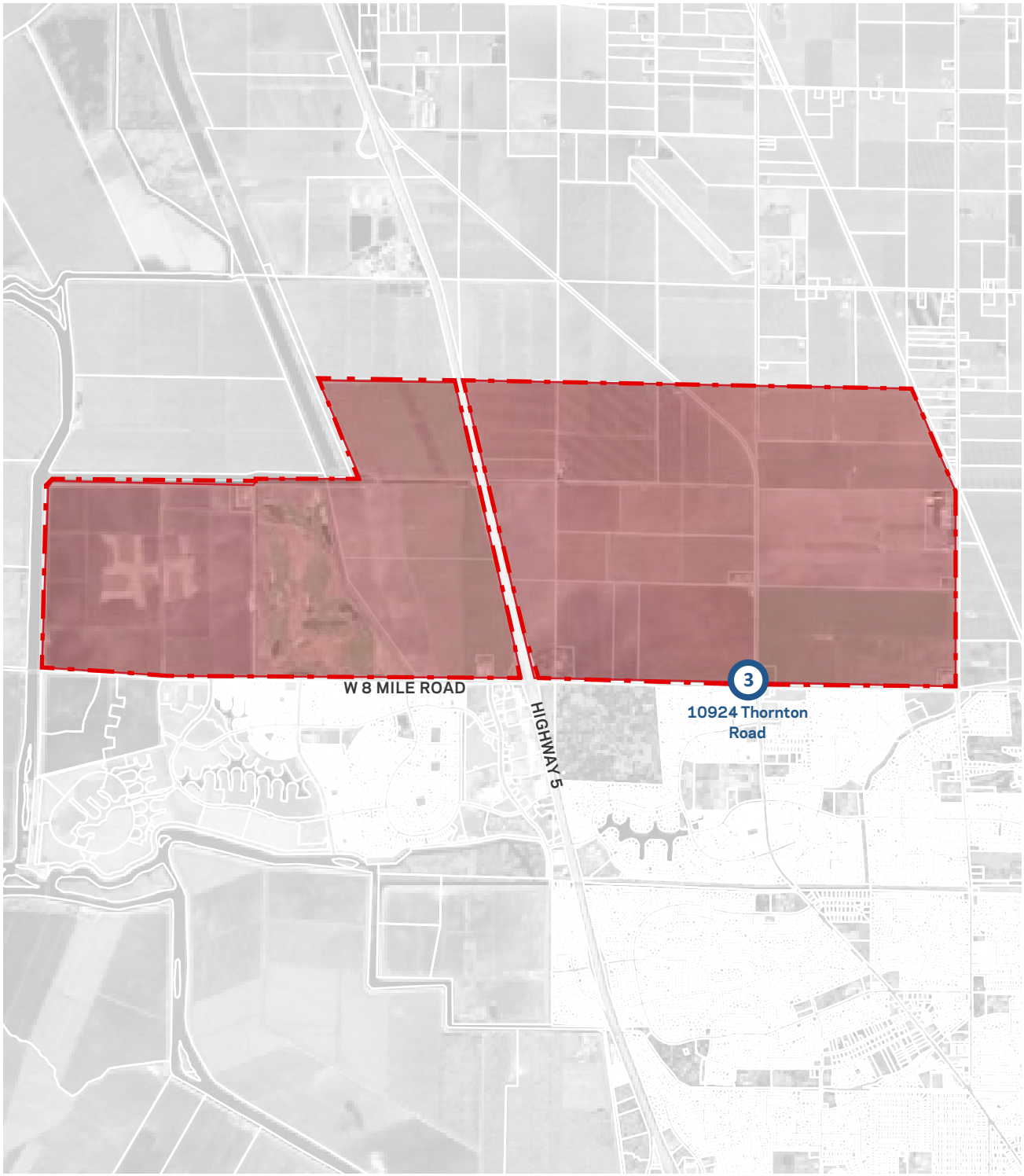
There is no project-level environmental clearance for this location, so an EIR for a CSU campus master plan is recommended for this site to streamline future efforts, including eliminating the potential time associated with annexation, which would be expected to take over two years. An EIR for a CSU campus Master Plan is expected to take 18 to 24 months. Potential noteworthy environmental impacts for this location include impacts to agricultural lands, wetlands, biological resources, transportation, water quality, hazardous waste, light and glare, floodplain, soil erosion, air quality, noise, and traffic. Overall, anticipated project-level CEQA clearance for new entitlements in the Stockton Education and Enterprise Zone is expected to be difficult and time consuming relative to other potential project sites.

Figure 5.27 Designated Agricultural Land

Source: California Department of Conservation (2016). "Farmland Mapping & Monitoring Program." CA Department of Conservation, www.conservation.ca.gov/dlrp/fmmp/.

Stockton Education and Enterprise Zone

UPPER CENTRAL VALLEY CLUSTER



LEGEND

Property Boundary

Walk Score

Resulting Site Area for Campus Use

N

0 400 800 1600FT

Figure 5.28 Stockton Education and Enterprise Zone - Site Area Evaluation Plan

Table 5.23 Stockton Education and Enterprise Zone Site Summary

Site Summary Table	
Land Area for Campus Development Scenarios	7,500 FTES Traditional Campus = 100 acres
	15,000 FTES Traditional Campus = 200 acres
Cluster	Upper Central Valley
Existing Campus Density	Low Density
Proposed Campus Density	Low Density
Existing Site Land Area	**3,783 acres**
Total Designated Land Area for University Use	0
Steep Slopes (over 20%) or Other Significant Conditions	0
Resulting Site Area for University Use	3,783
Implementation / Pre-Construction Status (EIR/ no EIR)	No EIR

Source: San Joaquin County Community Development Geographic Information Systems. (2020). Cadastral: Parcels. https://sjmap.org/GISDataDownload.htm

Table 5.24 Stockton Education and Enterprise Zone Site Elements

Site Elements	Condition	Potentially Significant	Source
Land capacity criteria			
Steep slopes >20%	None	No	San Joaquin County
Streams	Present	No	CA Department of Fish & Wildlife
High tension power lines	Present	Yes	CA Energy Commission
Easements	Data Not Available	-	-
Large tree stands, arboretums or orchards	None	-	-
Agricultural research fields	None	-	-
Physical resiliency criteria			
Earthquake zones of required investigation			CA Department of Conservation
Landslides	-	No	
Liquefaction	-	No	
Fault lines	-	No	
Probabilistic ground shaking > 40%	Below 40%	No	CA Department of Conservation
Designated agricultural land	Prime Farmland, Statewide Importance	Yes	CA Department of Conservation
Local access to agriculture resources > 2 miles	Present	No	Local Harvest
Flood zones	Zone 'X'	No	FEMA
Fire risk zones	Low	No	California Public Utilities Commission

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5.6 San Mateo County CCD – Cañada College

5.6.1 CAMPUS DEVELOPMENT SCENARIO

San Francisco State University previously operated a University Center within the San Mateo County Community College District, which was closed in part due to funding constraints. Stakeholders expressed interest in such a model, if it could be supported by a dedicated revenue source and there was strong long-term support for the CSU to co-locate on the Cañada College campus. Stakeholders also noted that the primary needs of potential students within the area were related to re-skilling and up-skilling for technology and engineering jobs in Silicon Valley, which could be delivered through a University Center development scenario co-located at Cañada College or elsewhere. To align with regional workforce needs, the University Center in San Mateo County could be associated with San José State University, which has a history of success in workforce-responsive programs that are, however, currently impacted., which may limit access. As such, this Report utilizes a University Center development scenario for evaluation purposes at the Cañada College site.

5.6.2 CRITERIA EVALUATION

SOCIOECONOMIC / INDUSTRY

Regional Enrollment Demand	◐
Ability to Serve First-Generation Students	○
Ability to Serve Underrepresented Minorities	○
Ability to Serve Lower-Income Populations	○
Regional Workforce / Industry Need	●

REGIONAL ENROLLMENT DEMAND

Enrollment demand within the Bay Area Cluster is expected to grow by approximately 4,700 students by 2035, peaking in 2025 at approximately 81,200 FTES before declining to 79,000 FTES in 2035 (see Table 3.3 in Section 3.3). This is largely driven by growth in A-G completion, as the number of high school graduates is projected to decline by approximately 10 percent over the projection period, and community college enrollment is projected to decline or remain stable. Nevertheless, the Bay Area campuses' Planned Capacity of 80,200 FTES modestly exceeds total enrollment demand, indicating that future growth can be accommodated at existing campuses.

ABILITY TO SERVE FIRST-GENERATION STUDENTS

The residential population within a 45-minute drive of the San Mateo County CCD – Cañada College site has the highest share of the population with a bachelor's degree (57 percent, compared to the state average of 34 percent), indicating that this area has the lowest potential to serve first-generation students, compared to the other four Evaluated Locations.[1]

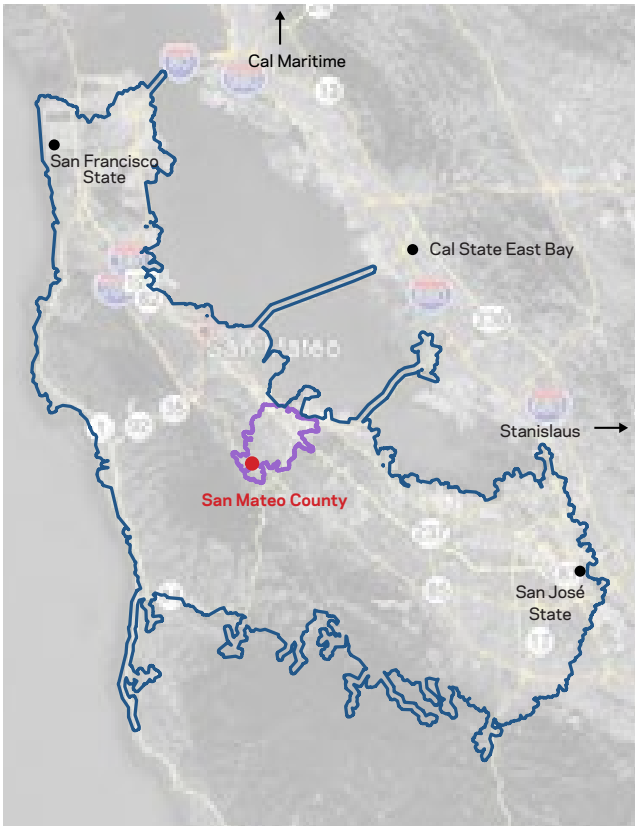
ABILITY TO SERVE UNDERREPRESENTED MINORITIES

The residential population within a 45-minute drive of the San Mateo County CCD – Cañada College site also ranks the lowest in historically underrepresented minority representation (20 percent, compared to the state average of 33 percent).[2] Stakeholders indicated that the increasing traffic burden has restricted career and wage growth opportunities for underrepresented students, as well as those looking to grow skills to remain competitive in the labor market.

ABILITY TO SERVE LOWER-INCOME POPULATIONS

Among identified sites within the Five Evaluated Locations, the residential population within a 45-minute drive of the San Mateo County CCD – Cañada College site has the highest median household income ($121,400, compared to the state median

Figure 5.29 San Mateo County Commute Shed Map



Source: Esri ArcGIS Business Analyst (Version 8.1). (2019). 45-minute drive toward the site on a typical Monday at 8:30am. HR&A Advisors, Inc. transit shed analysis of existing public transportation systems.

1. Esri ArcGIS Business Analyst (Version 8.1). (2019). American Community Survey socioeconomic profiles. 45-minute drive toward the site on a typical Monday at 8:30am.
2. Esri ArcGIS Business Analyst (Version 8.1). (2019). American Community Survey socioeconomic profiles. 45-minute drive toward the site on a typical Monday at 8:30am.

Figure 5.30 San Mateo County CCD – Cañada College Aerial

Table 5.25 San Mateo County Region Higher Education Institutions

Institution	Location	Type	Enrollment (FTES)
San Francisco State University	San Francisco	CSU	23,307
San José State University	San Jose	CSU	22,466
Skyline College	San Bruno	Community College	8,242
College of San Mateo	San Mateo	Community College	7,799
Cañada College	Redwood City	Community College	5,212
Menlo College	Atherton	Private	787
Notre Dame de Namur	Belmont	Private	982

of $74,500).[3] Stakeholders indicated that the increasing traffic burden has also disproportionately impacted lower-income residents seeking higher education opportunities.

REGIONAL WORKFORCE/INDUSTRY NEED

Occupational demand within the Bay Area Cluster is exceptionally high and accounts for more than 20 percent of projected occupational demand across the state, with more than 50 percent of statewide demand for computer and math-related occupations, due in large part to the presence of Silicon Valley (see Table 4.5 and Section 4.2.1). Despite having five California State University campuses and numerous other college and university campuses in the Bay Area, there is still a meaningful projected supply gap in every occupational category, with the largest gap in computer science and math-related occupations.

ACADEMIC

Partnerships with and Impacts on Interrelated Insitutions	●
Alignment with Local Industry	◐

PARTNERSHIPS WITH AND IMPACTS ON INTERRELATED INSTITUTIONS

San Mateo County is located in the Bay Area Cluster. The Cluster is served by seven public options for bachelor's degrees as well as a variety of private options (see Table 5.25). Two of the Evaluated Locations are in the Bay Area Cluster. Both San Francisco State University and San José State University are in relative geographic proximity. San Francisco State has an acceptance rate of 67 percent and San José State 64 percent. However, San José State is entirely impacted, making it less accessible than San Francisco State.

3. Esri ArcGIS Business Analyst (Version 8.1). (2019). American Community Survey socioeconomic profiles. 45-minute drive toward the site on a typical Monday at 8:30am.

San Mateo County Community College District is an entrepreneurial and relatively wealthy district (as compared to others in the region). The district has passed several bonds allowing them to invest in each of the three campuses, including investing in faculty/staff housing in one location with plans to build more. Cañada and Skyline have created programs to offer bachelor's degrees. The partnership with a local private school is considered limited in its long-term viability considering the cost of tuition associated with this option.

Should a CSU expand offerings in this area, there is likely to be a further negative impact on Notre Dame de Namur University due to declining enrollment over time. Less expensive alternatives for bachelor's degrees would certainly further accelerate the decline. As of the writing of this Report, the university had ceased accepting new students in summer and fall 2020.

The campus type considered most viable for this location is a University Center. Further evaluation by the CSU would be required to determine which of the proximate CSU campuses would be the most logical managing campus. Of primary importance to the community stakeholders would be alignment with workforce needs, including aviation, biotech, computer science/engineering, and other regional industries. Historically, there was a University Center on the Cañada College site. However, it was eliminated during a previous fiscal contraction in the CSU. To be considered a viable future alternative, the funding model would need to be modified so as not to be considered a drain on the main campus.

ALIGNMENT WITH LOCAL INDUSTRY

Growth in information and professional services has driven a demand for both highly technical employees and mid-level employees, including analytical, administrative, and management staff that support technology companies, leading to a surge in demand with which the local labor market has not kept pace. Stakeholders noted that some technology companies have partnered with educational institutions and workforce development organizations, including at least one campus of the San Mateo County Community College District, although they did not note any specific industry partnerships or industry funding commitments currently anticipated for expanded higher education at San Mateo County CCD – Cañada College.

PHYSICAL / COMMUNITY

Land Availability	●
Physical Infrastructure Availability	●
Campus Access and Surrounding Area Density	◐
Housing Availability	○
Access to Community Services and Amenities	○
Environmental Sustainability	●
Regulatory and Environmental Barriers	◐

LAND AVAILABILITY

The existing site area of Cañada College is approximately 124 acres. Currently 47 acres of that site area are master planned for Cañada College use and 43 acres of that site area contain slopes that are steeper than 20 percent. The resulting land area potentially available for additional development is 34 acres.

Due to underutilized existing facilities on the site today, a CSU could be created with the University Center development scenario that utilizes these existing structures. There are plenty of existing structures and enough unencumbered, available land on the site to accommodate this University Center campus development scenario.

This Report also provided analysis of sites containing sufficient land area to potentially build a CSU campus for use as a higher education development within San Mateo County. This Report utilized a variety of sources, including publicly available ArcGIS shapefiles (from city, county, or federal sources), to identify whether there is publicly-owned or privately-owned land within the County, beyond what was previously identified by the State of California, the CSU system, or community stakeholders.

Resultant under-developed parcels from the land availability study were largely golf courses and country clubs, large retail, shopping, and mall sites or large, privately-owned commercial properties. Therefore, no additional sites were studied. Maps for these sites are located in Appendix B.5 Land Availability Study.

PHYSICAL INFRASTRUCTURE AVAILABILITY

This site is currently a semi-greenfield site with some existing infrastructure.

Soil/Geotech

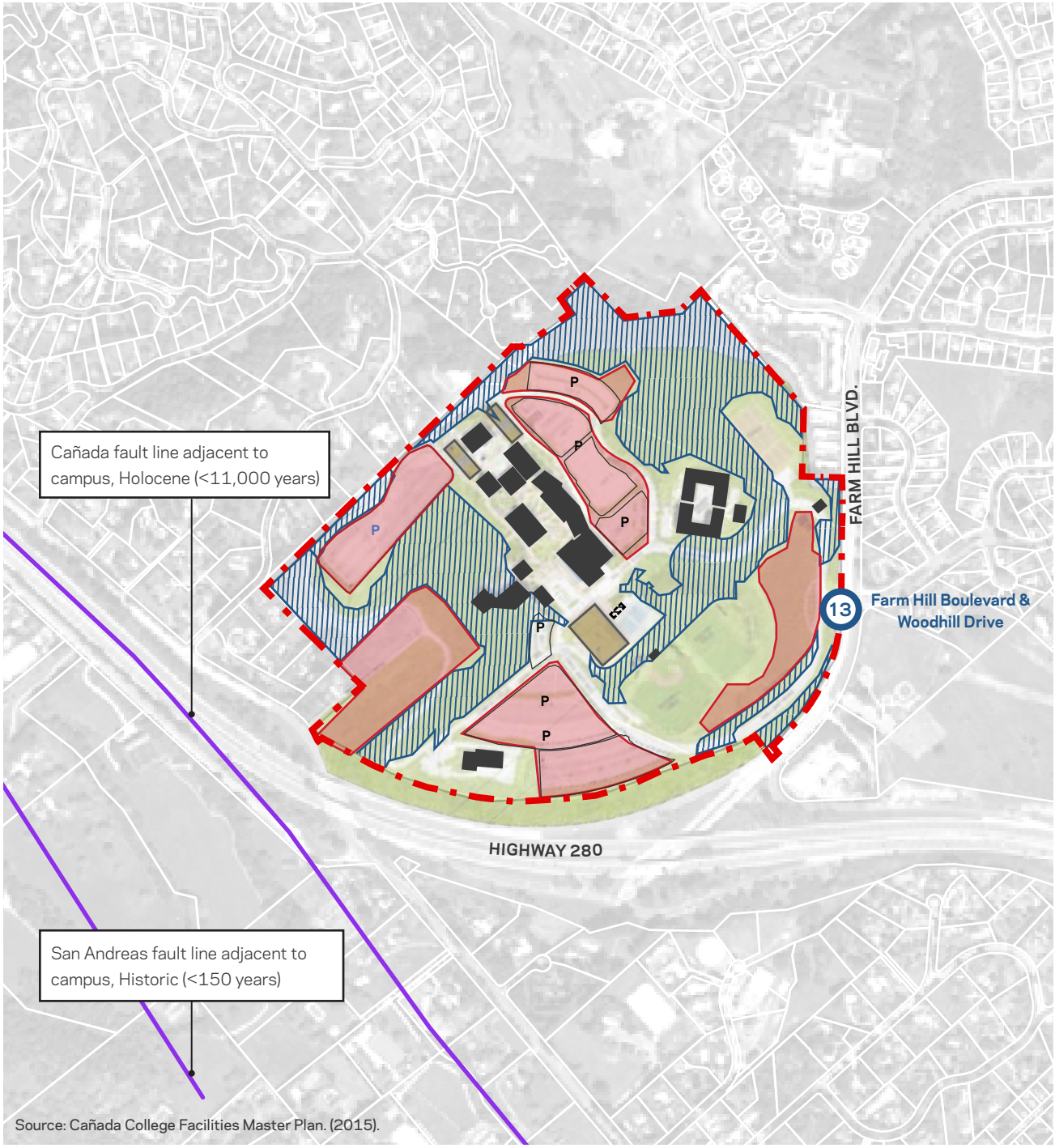
The San Mateo County CCD – Cañada College site has a Final EIR for SMCCD Facilities Master Plan competed in 2015, but no EIR for additional development of a CSU campus. The 2015 Final EIR found the potential for significant impacts due to strong seismically induced ground shaking, topsoil loss from construction, increased risk of landslides, and structural damage due to expansive and unstable soils. Site development for Cañada College will require a significant amount of clearing, grading, and cut and fill earthwork due to the steep slopes found on site.

Transportation

Cañada College is served with some bus transit today but has no plans for expansion of this service. It is expected that project-level environmental clearance specifically for CSU expansion on this site would require transportation mitigations like improved access, roadway widening, and improvements to signalized intersections. No transportation mitigations are identified for development at Cañada College in the Final EIR for SMCCD Facilities Master Plan. Overall, it is expected that the cost, effort, and time associated with transportation mitigations to accommodate CSU expansion at this site will be moderate in comparison to other sites.

San Mateo County CCD – Cañada College

BAY AREA CLUSTER



LEGEND

- Property Boundary
- Existing Buildings
- Future Buildings
- P Existing Parking Lot
- P Future Parking Lot
- P Existing Parking Structure
- P Future Parking Structure
- Walk Score Drop Pin
- Resulting Site Area for Campus Use
- Fault Lines
- Steep Slopes (over 20%)

N 0 400 800 1600FT

Figure 5.31 San Mateo County CCD - Cañada College – Site Area Evaluation Plan

Table 5.26 San Mateo County CCD – Cañada College Site Summary

Site Summary Table	
Land Area for Proposed Campus Model	500 FTES University Center = 2 acres
Cluster	Bay Area
Existing Campus Density	Low Density
Proposed Campus Density	Low Density
Existing Site Land Area	**124 acres**
Total Designated Land Area for College Use	47
Steep Slopes (over 20%) or Other Significant Conditions	43
Resulting Site Area for University Use	34
Implementation / Pre-Construction Status (EIR/ no EIR)	No recent EIR

Sources: San Mateo County GIS Enterprise Data. (2020). San Mateo County Active Parcels: https://isd.smcgov.org/gis-data-download

Table 5.27 San Mateo County CCD – Cañada College Site Elements

Site Elements	Condition	Potentially Significant	Source
Land capacity criteria			
Steep Slopes >20%	Above 20%	Yes	San Mateo County
Streams	None	No	CA Department of Fish & Wildlife
High tension power lines	None	-	CA Energy Commission
Easements	Data Not Available	-	-
Large tree stands, arboretums or orchards	None	-	-
Agricultural research fields	None	-	-
Physical resiliency criteria			
Earthquake zones of required investigation			CA Department of Conservation
Landslides	Possible	Yes	
Liquefaction	-	No	
Fault Lines	Cañada Fault adjacent to campus (Holocene <11,000 years) San Andreas Fault adjacent to campus (Historic <150 years)	Yes	
Probabilistic ground shaking >40%	Above 40%	Yes	CA Department of Conservation
Designated agricultural land	None	No	CA Department of Conservation
Local access to agriculture resources > 2 miles	None	Yes	Local Harvest
Flood zones	Zone 'X'	No	FEMA
Fire zisk zones	Extreme	Yes	California Public Utilities Commission

Infrastructure Systems

San Mateo County CCD – Cañada College will require power, water, recycled water, and wastewater infrastructure augmentation and expansions of existing systems to support further development of the site. Significant conditions related to the utilities and service systems are unknown and will require further detailed analysis. Stakeholders confirmed available capacity within existing utility systems to accommodate a new campus.

In addition to civil infrastructure requirements, the existing central utility plant and associated hydronic distribution network will require augmentation and expansion to serve further development of the site. Cañada College currently generates 50 percent of campus electricity requirements on site through solar systems to support campus energy goals, while the Pacific Gas & Electric Utility delivered 39 percent of its energy from renewable sources in 2018 according to the California Energy Commission.[4]

CAMPUS ACCESS AND SURROUNDING AREA DENSITY

San Mateo County CCD – Cañada College is accessible to 682,000 people under age 25 within a 45-minute drive at peak commute times, and only 22,000 people under age 25 within a 45-minute transit commute, accounting for approximately 29 and less than 1 percent of the overall Bay Area Cluster population, respectively.[5]

HOUSING AVAILABILITY AND AFFORDABILITY

San Mateo County has one of the most expensive housing markets in the state, and housing costs are often more than double statewide averages, exceeding even most other Bay Area counties.[6] The Cañada College campus is surrounded by lower-density single-family housing, and there is limited room for growth of higher-density housing in proximity to the campus.

ACCESS TO COMMUNITY SERVICES AND AMENITIES

The San Mateo County CCD – Cañada College site has an existing Walk Score of 13, meaning that it is car dependent and almost all errands require a car. It is located on three bus lines, Redwood City Transit Bus Lines 274, 278, and 275. Its Bike Score of 24 reveals that the site is somewhat bikeable and has minimal bicycling infrastructure. These results are based on the currently possible 20-minute walk from the site's entry at approximately 4200 Farm Hill Boulevard into the surrounding neighborhoods, which contain a moderate number of shopping opportunities, cultural and entertainment venues, and nearby schools, but no dining establishments, grocery stores, everyday errand opportunities, or publicly accessible parks.

ENVIRONMENTAL SUSTAINABILITY

Cañada College has an ideal climate to minimize energy infrastructure and provide for a comfortable academic environment. It has significant resilience challenges, but these are addressed in its Climate Action Plan. The campus has established progressive zero net energy (ZNE), renewable energy, and carbon neutrality goals. The campus has specific water use reduction goals and tracking in line with CSU policy. Green building policies exceed baseline CSU policy. Active waste audits demonstrate progress toward established zero waste goals. The multi-criteria analysis (see Appendix B.2 for additional evaluation of the sustainability criteria) weighs each of these environmental sub-criteria to create an aggregate score, concluding that this site is well aligned for campus development.

REGULATORY AND ENVIRONMENTAL BARRIERS

The subject site, located within the San Mateo Community College District (SMCCD), is a hilly 122-acre site utilized by the existing Cañada College. There is a Final EIR that was certified in 2015 for the existing college campus, but CSU expansion was not contemplated as part of this EIR. As the site is in the SMCCD, the property is subject to Government Code Section 53094, which authorizes a school district, by two-thirds vote of its members, to render city and county zoning ordinances inapplicable to the proposed use of certain property for educational purposes. City approvals and Conditional Use Permits would be necessary for non-educational purposes such as housing, administrative buildings, warehouses, and storage.

It is anticipated that an EIR for a CSU campus Master Plan would be necessary for development of this location, which is expected to take 18 to 24 months to process, but may be streamlined by applicable CEQA exemptions. It is anticipated that impacts related to visual aesthetics, biological resources, geology, hazards, hydrology/water, and transportation would take place. It is also expected that these impacts can be mitigated. Overall, anticipated CEQA clearance for new entitlements at Cañada College is expected to be moderate in terms of difficulty and processing time, relative to other potential project sites.

4. California Energy Commission Retail Electricity Supplier Annual Power Content Labels for 2018.
5. Esri ArcGIS Business Analyst (Version 8.1). (2019). American Community Survey socioeconomic profiles. 45-minute drive toward the site on a typical Monday at 8:30am.
6. California Realtors Association. (Q4 2019). Housing Affordability Index.

5.7 Evaluated Locations Conclusions

SOCIOECONOMIC/INDUSTRY

Regional Enrollment Demand

Projected 2035 enrollment demand anticipates increases in all Clusters, with projected incremental enrollment demand in the San Diego Cluster of 5,700 additional FTES (Chula Vista University and Innovation District), the Inland Empire Cluster of 5,500 additional FTES (CSUSB Palm Desert Campus), the Bay Area Cluster of 4,700 additional FTES (Concord Reuse Project Campus District and San Mateo County CCD – Cañada College), and the Upper Central Valley Cluster of 2,200 additional FTES (San Joaquin County – Stockton sites). Each of these Clusters has Planned Capacity at existing CSU campuses that exceeds total projected enrollment demand, indicating that future growth could be accommodated at existing CSU campuses if they are funded to expand.

Ability to Serve First-Generation Students

Based on the educational attainment of the residential population in close proximity to each Evaluated Location, all three sites within San Joaquin County (Stockton) have the highest potential to serve first-generation students,[1] as the area has the smallest share of population with a bachelor's degree or other advanced degree (22 percent, or 203,000 people). The CSUSB Palm Desert Campus has the second lowest share (25 percent, or 96,000 people), also indicating a high potential. San Mateo County CCD – Cañada College serves the largest share of population with a bachelor's degree or other advanced degree (57 percent, or 995,000 people), indicating a lower potential to serve first-generation students. The Concord Reuse Project Campus District also serves a large share of population with a bachelor's degree or other advanced degree (45 percent, or 964,000 people). The Chula Vista University and Innovation District serves a population with 40 percent higher education degree holders, or 620,000 people.

Ability to Serve Underrepresented Minorities

Of all of the Evaluated Locations, the CSUSB Palm Desert Campus has the highest share of historically underrepresented minorities living in close proximity, and it is the only site to rank significantly higher (38 percent, or 211,000 people) than the statewide average (33 percent), indicating strong potential to serve underrepresented minorities. However, the area served by the CSUSB Palm Desert Campus is relatively less dense than other Evaluated Locations, with total population roughly one-third of the next smallest population surrounding the Evaluated Locations. San Joaquin County (Stockton) serves the next highest share of underrepresented minorities (34 percent, or 485,000 people). The Chula Vista University and Innovation District serves a population with 31 percent underrepresented minorities, or 707,000 people. The Concord Reuse Project Campus District serves a population with 29 percent underrepresented minorities, or 879,000 people. San Mateo County CCD – Cañada College serves a population with the smallest share of underrepresented minorities (20 percent, or 485,000 people).

Ability to Serve Lower-Income Populations

Based on the median household income of the residential population in close proximity to all of the sites, the CSUSB Palm Desert Campus has the highest potential to serve lower-income populations (median household income of $54,000). San Joaquin County (Stockton) has the second highest potential to serve lower-income populations (median household income of $66,000). The Chula Vista University and Innovation District serves a population with median household income of $78,000, and the Concord Reuse Project Campus District serves a population with median household income of $93,000. San Mateo County CCD – Cañada College serves the population with the highest median household income ($121,000) and the lowest potential to serve lower-income populations. Note that the Evaluated Locations are proximate to populations of different sizes, which are further discussed in the "Campus Access and Surrounding Area Density" subsection below.

Regional Workforce/Industry Need

This Report finds that projected degree conferral in 2026 across the CSU system, based on historical trends, is generally growing fast enough for the CSU to maintain or improve the share of CSU degrees conferred to occupational demand in 2016. The Bay Area Cluster (which includes the Concord Reuse Project Campus District and the San Mateo County CCD – Cañada College sites) and Inland Empire Cluster (which includes the CSUSB Palm Desert Campus site) are notable exceptions; existing CSU campuses' share of health care-qualified graduates are projected to decline as compared to occupational demand. This Report projects that CSU campuses within the San Diego and Upper Central Valley Clusters will keep pace with increased occupational demand. As noted previously, collectively California higher education institutions fall short of producing enough qualified graduates in finance, accounting, human resources and operations managers, computer science and math workers, PreK-12 school teachers, and health care workers.

ACADEMIC

Partnerships with and Impacts on Interrelated Institutions

The educational landscape in each of the Five Evaluated Locations is unique, with a complex interdependency among K-12 districts, community college districts, and public and private higher educational entities. The Report finds that the negative impacts of campus expansion would likely primarily impact the private, nonprofit institutions in the region, which are already suffering from declining enrollment demand and related negative financial trends. The campus models selected for each location were chosen to

1. Most identified sites are currently poorly served by transit, which limits their ability to serve lower-income populations who do not have access to an automobile. In total, the Five Evaluated Locations are with a 45-minute transit commute of less than 155,000 people under age 25 (with the Concord Reuse Project Campus District and Stockton University Park each accounting for approximately one third, respectively, of that total population). As such, transit serves less than 5 percent of the population under age 25 within a 45-minute drive; this Report uses a 45-minute drive time to evaluate the demographics of the communities surrounding each Evaluated Site. It should be noted that Stockton University Park will be more accessible in the future due to rail extensions in the San Joaquin Valley. Chula Vista University and Innovation District will also likely become accessible to new populations due to new rapid bus service to Downtown San Diego and the Otay Mesa border crossing. The Concord Reuse Project Campus District is served by fixed rail. The other identified sites have very limited transit access.

address regional gaps in educational availability, without creating redundancy or further negative fiscal consequences for campuses within the system or similarly funded by the state. Further on the impacts of discussion is provided in Section 6.4.

Alignment with Local Industry

None of the stakeholders associated with any of the Evaluated Locations indicated specific industry partnerships or industry funding commitments associated with a future campus. However, the current CSUSB Palm Desert Campus was built in part using donations from local businesses and philanthropy, and Stockton has seen tremendous interest in the past several years and strong partnership with national and statewide philanthropic organizations, which have invested heavily in education and other programs related to social equity and mobility.

PHYSICAL/COMMUNITY

Land Availability

Overall, all of the sites have enough land on the site to accommodate the proposed campus development scenario within the site's boundary. However, while Stockton University Park has enough land within the site's boundary, due to ongoing ground leases, it does not have enough unencumbered land to accommodate its proposed campus development scenario, a 7,500 FTES Branch Campus. A Stockton University Park campus would require demolition, redevelopment, and densification of the site plan and a reconceptualized Master Plan to accommodate its proposed campus development scenario in this Report.

Physical Infrastructure Availability

Based on the evaluated criteria, San Mateo County CCD – Cañada College is the only site with minimal soils conditions requiring mitigation, minimal transportation deficiencies, and significant existing utilities infrastructure. The San Joaquin County Fairground and Stockton Education and Enterprise Zone sites' soil conditions are undetermined, and a development plan for infrastructure expansion does not currently exist. The remaining sites have development plans to address soil and seismic conditions, transportation deficiencies, and infrastructure expansion.

Campus Access and Surrounding Area Density

The Concord Reuse Project Campus District is accessible to roughly 889,000 people under the age of 25 within a 45-minute drive at peak commute times, the largest potential population served of the Evaluated Locations and reaching for approximately 38 percent of the overall Bay Area Cluster population. The Concord site is followed by the Chula Vista and San Mateo County Evaluated Locations (roughly 731,000 and 682,000, respectively), with the Stockton and Palm Desert Evaluated Locations accessible to fewer people under the age of 25 (504,000 and 172,000, respectively).

Most identified sites are currently poorly served by transit, with the exception of the Concord Reuse Project Campus District, which is served by fixed rail, and Stockton University Park, which has some transit. In total, the Five Evaluated Locations serve approximately 153,000 people under age 25 within a 45-minute transit commute (with the Concord Reuse Project Campus District and Stockton University Park each accounting for approximately one-third of the total population), compared to 2,978,000 people under age 25 within a 45-minute drive. Stockton University Park will potentially be accessible in the future by rail extensions in the San Joaquin Valley. The Chula Vista University and Innovation District will also likely become accessible to new populations via expanding rapid bus service to Downtown San Diego and the Otay Mesa border crossing. The other identified sites have very limited transit access.

Housing Availability

Housing costs as compared to median incomes near the CSUSB Palm Desert Campus are significantly below state average ratios; however, there is generally little multifamily development apart from projects marketed toward or exclusively available to retirees. Similarly, housing costs in San Joaquin County are lower than state averages, although they have increased in recent years in response to out-migration from the Bay Area. The Concord Reuse Project Campus District and Chula Vista University and Innovation District sites are within large-scale, mixed-use planned developments that are zoned for and anticipate a mix of single- and multi-family housing. The Stockton and Palm Desert sites are in proximity to developable land that is zoned for housing. Of the sites in Stockton, University Park is in proximity to modest amounts of medium-density multifamily housing; most recent housing production in San Joaquin County has been single-family home subdivisions marketed to families. The San Mateo County CCD – Cañada College site is not in proximity to meaningful amounts of developable land or multi-family housing.

Access to Community Services and Amenities

As an urban site in a downtown environment, Stockton University Park currently provides the highest access to student-and staff-supporting amenities and community services of any of the sites evaluated. Stockton University Park's Walk Score is 75, meaning that most errands can be accomplished on foot. Its Transit Score is 29, meaning there are a few nearby public transportation options, and its Bike Score of 74 reveals that biking is convenient for most trips based on the amount of cycling infrastructure today. These results are based on a 20-minute walk from the site's entry at approximately 501 East Magnolia Street into the surrounding neighborhoods, which contain a very high number of dining establishments, grocery stores, everyday errand and shopping opportunities, publicly accessible parks, and cultural and entertainment venues.

The other sites' Walk Scores are much lower, with San Joaquin County Fairground at 48, CSUSB Palm Desert Campus at 45, Chula Vista University and Innovation District at 34, and Concord Reuse Project Campus District at 23. However, the Concord Reuse Project Campus District and Chula Vista University and Innovation District have Master Plans that anticipate future walkable, mixed-use development surrounding the campus sites, which will significantly improve the Walk Scores of those locations once built out.

Figure 5.32 Criteria Evaluation Matrix for Sites at Evaluated Locations

	Evaluation Criteria	Chula Vista University and Innovation District	Concord Reuse Project Campus District	CSUSB Palm Desert Campus	Stockton University Park	San Joaquin County Fairground	Stockton Education and Enterprise Zone	San Mateo County CCD – Cañada College
Socioeconomic / Industry	Regional Enrollment Demand	◐	◐	◐	○	○	○	◐
	Ability to Serve First-Generation Students	◐	○	●	●	●	●	○
	Ability to Serve Underrepresented Minorities	◐	◐	◐	◐	◐	◐	○
	Ability to Serve Lower-Income Populations	◐	○	●	◐	◐	◐	○
	Regional Workforce / Industry Need	●	●	◐	○	○	○	●
Academic	Partnerships with and Impacts on Interrelated Insitutions	◐	◐	●	●	●	●	●
	Alignment with Local Industry	◐	◐	●	●	●	●	◐
Physical / Community	Land Availability	●	●	●	◐	●	●	●
	Physical Infrastructure Availability	◐	◐	◐	◐	◐	◐	●
	Campus Access and Surrounding Area Density	◐	●	○	○	○	○	◐
	Housing Availability	◐	◐	●	●	●	●	○
	Access to Community Services and Amenities	◐	◐	○	●	◐	○	○
	Environmental Sustainability	◐	●	◐	○	○	○	●
	Regulatory and Environmental Barriers	●	◐	●	●	○	○	◐

Environmental Sustainability

Just as CSU Sustainability Policy seeks to integrate sustainability into all facets of the CSU, including academics, facilities, operations, the built environment, and student life, the long-range projects for the CSU's development potential may leverage growth towards environmental stewardship. The goal for the environmental sustainability criteria is to pair enrollment, academics, and workforce readiness with CSU projects for development, densification, and operations that enable advancement and deployment of CSU systemwide sustainability goals.

All sites are evaluated to determine their appropriateness for development: their condition, climate, and resilience factors; current and planned infrastructure and operational practices; and commitments to advance carbon neutrality and climate resilience goals with community engagement. All sites have various resilience and sustainability strengths and challenges (which are described in Section 5 of this Report) and can meet or exceed the CSU Sustainability Guidelines established for campus development. A Multi Criteria Analysis (detail provided in Appendix B.2) is integrated to ensure consistent analysis across seven key criteria of CSU Sustainability Policy, a comparative scale within the scoring rubric, and a hierarchy process that weighs different criteria and sub-criteria as priorities for development. The completed analysis provides the scoring and corresponding alignment designation.

A new CSU at any of the Evaluated Locations would be feasible to serve as a catalyst for sustainable development. Individual sites such as the Concord Reuse Project Campus District and San Mateo County – Cañada College demonstrate that existing protocols and practices would likely ensure that future development would be integrated in a sustainable fashion. The CSUSB Palm Desert Campus has individual strengths and weaknesses that indicate a need for robust infrastructure replacement/upgrade and emphasis on improved practices for operations. Finally, the Chula Vista University and Innovation District, Stockton University Park, San Joaquin Fairground, and Stockton Education and Enterprise Zone would require significant new infrastructure systems to be developed. However, such investment creates the opportunity for a transformational reorientation in academics and for the workforce to integrate better building and operational policies that may enable a community to advance from current practice to best sustainable practice.

Regulatory and Environmental Barriers

Overall, anticipated CEQA clearances for new entitlements at the Chula Vista University and Innovation District, CSUSB Palm Desert Campus, and Stockton University Park sites are expected to be quick and easier relative to other potential project sites. Anticipated CEQA clearances for new entitlements at the Concord Reuse Project Campus District and San Mateo County CCD – Cañada College sites are expected to be moderately difficult and time consuming relative to other potential project sites. Anticipated CEQA clearances for new entitlements at the San Joaquin County Fairground and Stockton Education and Enterprise Zone are expected to be difficult and time consuming relative to other potential project sites.

6.0 Implementation at Evaluated Locations

This section of the Report addresses costs, schedule, and impacts associated with implementation of university expansion. Sections 6.1 and 6.2, Capital Costs and Capital Funding, assess the capital cost for construction of new campus facilities and evaluate relevant local funding sources for capital construction at each of the Evaluated Locations. In addition, Section 6.2 identifies the impact of different campus development scenarios on the debt limits set by the State of California's Education Code. Section 6.3, Operating Costs Analysis, includes the general operating cost approach, the application of that approach to the various campus typologies, and the corresponding operating costs for the identified sites. Section 6.4, Schedule of Implementation, provides potential schedules of implementation for each of the seven identified sites, outlining the processes required to reach the first day of classes at a new campus development scenario. Section 6.5 addresses economic impacts, local development implications, and institutional impacts of a new CSU campus.

6.1 Capital Cost Analysis

6.1.1 CAPITAL COST ANALYSIS METHODOLOGY

This Report includes a capital cost analysis for the seven identified sites within the Five Evaluated Locations based on the academic plans for a Branch Campus and a Traditional Campus outlined in Section 4.4. Costs are analyzed for the site development and on-site utility infrastructure based on the proposed site area, and have been adjusted for each location using the R.S. Means City Index, 2020. Based on the evaluated development scenarios of each site, as described in Section 5, this Report reviews the cost for three development scenarios: a Branch Campus at 7,500 FTES, a Traditional Campus at 7,500 FTES, and a Traditional Campus at 15,000 FTES. The costs indicated for the 15,000 FTES Traditional Campus are additive to the 7,500 FTES cost model. A 7,500 FTES Branch Campus development is very similar to a Traditional Campus development scenario of the same capacity, but a Branch Campus assumed program does not include auditoria and has reduced administration space requirements. For this Report, the academic program spaces are consistent for the sites with the same development scenario, and adjustments have been made for sites where there are existing facilites. A University Center is evaluated for some locations in previous sections of this Report (San Mateo County and City of Concord); there are no capital cost estimates for these as they are anticipated to occupy buildings developed by others and then leased by the CSU. Further study of the existing facilities to be leased by the CSU would be needed to evaluate any renovations or other capital investment required specific to the programs that are proposed at these locations.

A cost summary for site work at each identified site is included and is inclusive of existing building demolition, site development and on-site utility infrastructure (both costs based on proposed site development area), and off-site utility infrastructure. Based on the outreach discussions with the municipalities and counties, site acquisition costs are not included, as all locations have indicated the support of a CSU campus and the desire to work with the CSU to provide the land at little or no cost. Costs associated with land transfer (either between the state or city and the CSU or between a private owner and the CSU) are not included. Site remediation requirements at the sites is undetermined, and further site analysis would be required to develop an associated cost for such remidation; this has been indicated as TBD, as this can be a significant cost to the project.

SCHEDULE IMPACTS TO COST MODELS

Costs in this Report reflect market conditions and unit rates as of June 2020. As the construction period for any of the evaluated campus developments may range in time from 5 to 50 years, this Report recommends the CSU assume an annual escalation rate of 3 to 4 percent based on historical cost indices measured over long timelines.

COST MODEL ASSUMPTIONS

Cost model assumptions and clarifications of development costs in this Report are based on the following assumptions, inclusions, and exclusions for the cost categories below:

Location Factor – The R.S. Means City Index 2020 is utilized to provide a location factor applied to each site. Southern California is noted as 1.0, and there are cost premiums for sites in Northern California and in the Northern Central Valley region.

Programs – Costs are based on programmatic space requirements (as described in Section 4.4 of this Report). The CSU Cost Guide was reviewed and considered, but this Report outlines costs which reflect historical cost data for projects with similar programs, current market conditions, and unit rates. See Tables 6.1 and 6.2 for program cost summaries for a Branch Campus at 7,500 FTES and a Traditional Campus at 7,500 FTES and 15,000 FTES, respectively. See Appendix Section A.6 for program cost detail.

Buildings – Costs assume institutional-quality buildings with a minimum 50-year lifespan and account for net zero design features based upon current net zero design strategies and technologies.

Central Plant – Program costs for a central plant assume some major mechanical and electrical equipment will be included within the central plant building, which increases cost per square foot.

Parking – This cost model includes assumptions on parking structures for each of the development scenarios as outlined in Appendix Section A.7. Both a Branch Campus and a Traditional Campus at a size of 7,500 FTES is assumed to have surface parking only (cost for surface parking is included in the

Site Development category), while the larger 15,000 FTES Traditional Campus includes some structured parking and associated costs.

Site Acquisition – Site acquisition costs are excluded from project costs as they may not be needed. During meetings with stakeholders, the cities/land owners indicated the desire to work with the CSU and that the land may be available for the development of a campus at little or no cost.

Site Remediation – Costs associated with adverse soil conditions and remediation as well as special foundation requirements such as piles or mat slabs are excluded. This Report has noted specific geotechnical information, which is available for each site within Section 5; due to previous planning efforts, some sites have more information than others.

Site Development – Site development costs include site clearing and grading, earthworks (cut and fill), new site paving (including surface parking) and landscaping (including site walls and ramps, signage, and fixed furnishings), new storm drainage and treatment systems, and site lighting and power. Site development costs are based on 70 percent of site area (i.e., 30 percent of site area is assumed to be covered by buildings).

On-Site Utility Infrastructure – On-site utility infrastructure costs include main utility lines and primary distribution across campus, including central plant and utility infrastructure distribution to buildings.

Project Soft Costs – Project soft costs are based on 30 percent of construction costs and include planning, architecture and engineering design, and construction administration fees (including design-build fees, if applicable); campus contract management services; campus project contingency (for construction and Owner); Group I and II furnishings, fixtures, and equipment; owner-controlled insurance protection (OCIP); and building permit and agency fees. Costs for CEQA clearance are excluded.

Legal Fees – Legal fees and finance costs are excluded.

Off-Site Utility Infrastructure – Off-site utility infrastructure is included as an allowance based on the site's location within developed areas and what is known based on completed utility master plans or EIRs. For the three sites within San Joaquin County (Stockton), a more detailed analysis was completed to study the off-site infrastructure, and a more refined allowance is included.

Off-Site Improvements – At many of the identified sites, there will need to be improvements to surrounding roads, traffic signals, etc. based on the impacts of adding a campus to the site. This Report excludes an allowance for these costs, as they can vary greatly depending on the types of improvements needed and CEQA mitigations required, and it is unknown how they would be financed (by the city, county, a master developer, or the CSU).

6.1.2 CAPITAL COST SUMMARY FOR SITES

The cost summary tables are organized by development scenario type. The locations where a Branch Campus at 7,500 FTES is evaluated are presented in Table 6.1. The locations with a Traditional Campus at 7,500 FTES and 15,000 FTES are shown in Tables 6.2. Detail for each location and development scenario is provided in Appendix Section A.6 of this Report.

Table 6.1 Capital Cost Summary by Site - Branch Campus at 7,500 FTES

			Chula Vista University & Innovation District	CSUSB Palm Desert Campus	San Joaquin County Fairground	Stockton Education & Enterprise Zone
			TOTAL ($ x 1,000)	TOTAL ($ x 1,000)	TOTAL ($ x 1,000)	TOTAL ($ x 1,000)
	Location Factor		1.00	1.15	1.00	1.05
P	Programs		1,284,322	1,476,970	1,247,620	1,597,388
S	Sitework		300,194	509,398	216,849	286,582
PS	Parking Structures		All surface parking	All surface parking	All surface parking	All surface parking
Z30	Escalation Not Included	0.00%	0	0	0	0
Construction Budget, June 2020			**1,584,516**	**1,986,369**	**1,464,470**	**1,883,971**
	Project Soft Costs	30.00%	475,355	595,911	439,341	565,191
Project Budget, June 2020			**2,059,871**	**2,582,280**	**1,903,811**	**2,449,162**

Notes:
1. Location factor based on R. S. Means City Index 2020.
2. Palm Desert program reflects credit for existing buildings on Campus.
3. The following items are currently not part of the Project Budget above:
   Site acquisition - all land acquisition assumed to be provided to the CSU.
   Site remediation - TBD / cost unknown.
   Off-site improvements - TBD / cost unknown.

Source: MGAC estimates based on Consultant Team campus development scenario specifications.

For the Stockton University Park site, further analysis and evaluation is presented in Section 5.5 of this Report, which identifies three phases of site development (see Figures 5.20, 5.21, 5.22). These exhibits evaluate the existing buildings (historic and non-historic) and the lease terms of the buildings across the site. Each phase identifies buildings and/or parcels which become available based on the lease terms and would then be available for use by the CSU. The Branch Campus cost for Stockton University Park, in Table 6.1, is inclusive of the third phase identified in Section 5.5, which includes the full program for 7,500 FTES, renovation of existing buildings, sitework and additional development across the site. Costs are provided for the first two phases of development in Appendix A.6, as a guide for the site work and renovation costs anticipated for the CSU to occupy these spaces. For the cost summary, all renovation costs are indicated in an average cost per square foot, and this cost would adjust as specific program uses are identified by the campus and if any building remediation is required. The sitework costs are presented similarly to the other campus development scenarios.

Capital costs across the identified sites are most greatly impacted by the sitework required (based on available land area and infrastructure needs), the location within the state (location factor), and if the CSU has existing facilities on the site which can be utilized as a part of the future campus development.

Table 6.2 Capital Cost Summary by Site – Traditional Campus at 7,500 FTES and 15,000 FTES

				Chula Vista University & Innovation District TOTAL ($ x 1,000)	CSUSB Palm Desert Campus TOTAL ($ x 1,000)	San Joaquin County Fairground TOTAL ($ x 1,000)	Stockton Education & Enterprise Zone TOTAL ($ x 1,000)
		Location Factor		1.00	1.00	1.05	1.05
Initial 7,500 FTES	P	Programs		1,477,763	1,441,061	1,551,651	1,551,651
	S	Sitework		312,369	216,849	277,899	465,102
	PS	Parking Structures		All surface parking	All surface parking	All surface parking	All surface parking
	Z30	Escalation Not Included	0.00%	0	0	0	0
	Construction Budget, June 2020			**1,790,132**	**1,657,911**	**1,829,551**	**2,016,754**
		Project Soft Costs	30.00%	537,040	497,373	548,865	605,026
	Project Budget, June 2020			**2,327,172**	**2,155,284**	**2,378,416**	**2,621,781**
Additional 7,500 FTES	P	Programs		1,610,925	1,610,925	1,691,472	1,691,472
	S	Sitework		219,654	211,238	250,150	406,191
	PS	Parking Structures		28,110	28,110	29,516	29,516
	Z30	Escalation Not Included	0.00%	0	0	0	0
	Construction Budget, June 2020			**1,858,690**	**1,850,274**	**1,971,138**	**2,127,179**
		Project Soft Costs	30.00%	557,607	555,082	591,341	638,154
	Project Budget, June 2020			**2,416,297**	**2,405,357**	**2,562,479**	**2,765,333**
Total Project Budget For 15,000 FTES				**4,743,469**	**4,560,641**	**4,940,895**	**5,387,114**

Notes:
1. Location factor based on R. S. Means City Index 2020.
2. Palm Desert program reflects credit for existing buildings on Campus.
3. The following items are currently not part of the Project Budget above:
   Site acquisition - all land acquisition assumed to be provided to the CSU.
   Site remediation - TBD / cost unknown.
   Off-site improvements - TBD / cost unknown.

Source: MGAC estimates based on Consultant Team campus development scenario specifications.

6.2 Funding Sources and Availability

6.2.1 CSU CAPITAL FUNDING SOURCES

This section describes the funding sources available for the construction of new CSU facilities. Absent major shifts in how the CSU and the State of California finance major capital projects, the majority of funding and financing sources are anticipated to come from General Obligation and Public Works Board Lease Revenue Bonds, Systemwide Revenue Bonds, Fundraising, and Public-Public and/or Public-Private Partnership models.

This section additionally describes capital funding necessary for a new campus at each of the Five Evaluated Locations. For each campus development scenario, capital costs are conservatively assumed to be financed through Systemwide Revenue Bonds (SRB) using either the Academic Program or Self Support Program. All capital costs for programs and sitework are assumed to be Academic Program with four exceptions: residential life and housing, student recreation and wellness, student union, and parking structures. This Report estimates both total project cost and cost to the CSU for infrastructure and Academic Program components of a new campus, described further in Section 6.2.3. While this Report does not include the debt service associated with Self Support projects, it should be noted that these projects will require fee revenues as described above to build reserves to qualify for the SRB program. This will take time, and self-support facilities will not be available until a campus has sufficient enrollment to collect such fees, likely closer to an enrollment of 7,500 FTE.

GENERAL OBLIGATION AND PUBLIC WORKS BOARD LEASE REVENUE BONDS

The State of California has historically used General Obligation (GO) and different types of revenue bonds to finance academic facilities at CSU campuses. Academic or otherwise non-revenue-generating facilities include campus infrastructure projects, academic and administrative buildings, and other capital facilities that are essential to CSU operations. State GO bonds rely on the full faith and credit of the State of California and require a statewide public vote. State lease revenue bonds, issued by the State Public Works Board, rely on a dedicated revenue source and do not require a public vote. In 2014, the State of California enacted legislation requiring that GO and State Public Works Board Lease Revenue Bond debt service on such bonds that had been issued to fund capital projects on CSU campuses be paid from the CSU operating budget on an ongong basis. At the same time the legislation was enacted, the State of California increased its ongoing annual General Fund support appropriation for the CSU by an amount to cover such future debt service payment. The legislation also stipulated that, going forward, the CSU would be responsible for financing academic facilities and granted additional authorties to the CSU to enhance its ability to finance such facilities, but left open the possibility that a future GO bond could be utilized to finance CSU capital facilities. Voters rejected Proposition 13, a GO Bond on the March 2020 ballot, and the CSU now largely utilizes systemwide revenue bonds (discussed below) instead of Public Works Board-issued revenue bonds; state-issued bonds are unlikely future sources to fund construction of a new CSU campus.

SYSTEMWIDE REVENUE BONDS

SRBs were originally designed to provide flexible financing for revenue-generating structures such as parking, housing, or student-funded facilities such as student unions (collectively "Self Support"). Prior to 2014, debt issued under the SRB program was secured by the revenues of the Self-Support programs, specifically housing fees, parking fees, student body center fees, health facility fees, continuing education revenues, and unrestricted auxiliary revenues. The 2014 legislation permits the CSU to also use SRBs to fund academic and other non-revenue-generating projects. Debt for non-revenue-generating projects ("Academic Program") bonds is capped per the California Education Code, described below in further detail. In 2016, to support the ongoing addition of Academic Program bonds under the SRB program, student tuition revenue was added to the SRB revenue pledge as authorized under the 2014 legislation. SRB bonds are issued and approved by the CSU Board of Trustees but do not require other approvals, and are used regularly by CSU campuses, as detailed further below.

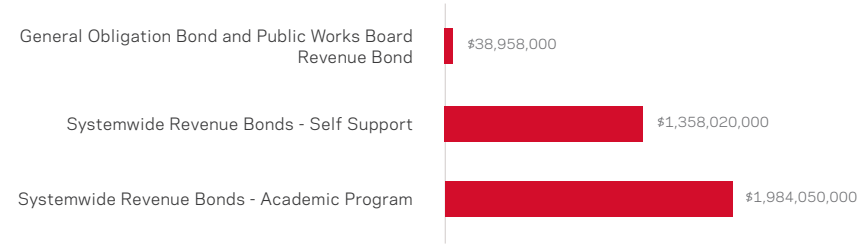
FUNDRAISING

Campuses use fundraising to generate additional revenue for capital projects, but it is not consistent or universally utilized. Some capital projects are more conducive to fundraising campaigns, including prominent academic buildings and athletic facilities. In addition to donor campaigns, philanthropy and grants can support capital development at CSU campuses. Currently, when financing a project using SRBs, the CSU Office of the Chancellor requests that CSU campuses contribute at least 10 percent of project costs, which are frequently secured through fundraising. There is not a strong precedent for fundraising targets for a new CSU campus, as a capital campaign could be challenging due to lack of an alumni network, brand recognition, and new campus administrators. This 10-percent threshold is likely to be viewed flexibly, and thus this Report assumes 100 percent CSU and state funding for non-revenue-generating capital projects.

PARTNERSHIPS

Due to public financing constraints, both public-public and public-private partnerships ("P3") are increasingly used as an alternative financing source. In some cases, a public-public-private partnership ("P4") can be used.There is a spectrum of public-private partnership models, ranging from relatively common ground lease structures to more complex "DBFOM" models, in which a private developer designs, builds, finances, operates, and maintains the facilities in return for certain annual payments. Within the CSU, public-private partnerships frequently involve a partnership with a private entity to develop and deliver a project, transferring risk and financing responsibility to the private entity. In certain cases, the developer assumes long-term operational responsibility for the facility in exchange for an annual payment or facility-specific revenues for a period of 30 to 40 years, at which point the public entity takes full control of the facilities. This structure reduces risk to a public entity over the near and long term while avoiding issuance of debt, but

Figure 6.1 Five-Year Capital Project Financing Tools (2015/16 – 2019/20)



Source: California State University Office of the Chancellor, Capital Planning, Design and Construction. (2019). California State University Five-Year Plan – 2015/16 through 2019/2020.

private entities generally have a higher cost of capital than public entities. Public-private partnerships are most frequently utilized for revenue-generating projects, including student housing or mixed-use development with office and retail, but have also been used to deliver academic facilities, as discussed in further detail below.

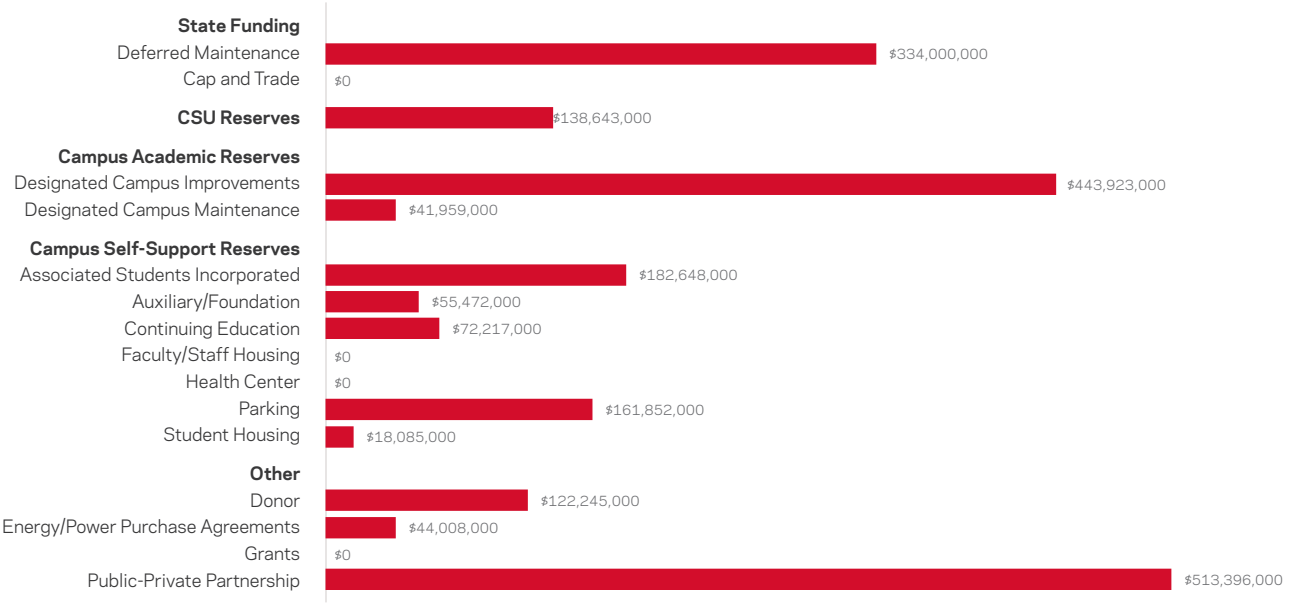
HISTORICAL CSU FUNDING PATTERNS

CSU campuses utilize a range of strategies for capital funding and financing. Figures 6.1 and 6.2 illustrate the debt financing and funding sources used by existing CSU campuses, represented as the total dollar amount in the overall system. Debt financing for academic facilities totaled $3.4 billion between academic years 2015/16 to 2019/20. SRB Academic Program bonds accounted for the largest share of financing for capital projects ($1.98 billion), while use of GO and Public Works Board Lease-Revenue bonds was minimal ($39 million).

Systemwide funding allocated to campuses directly for construction goes towards repayment of debt (including a portion of the bonds noted above as well as previously issued bonds) and other capital expenditures. This amounted to $2.1 billion over the same time period, consisting of a robust mix of state funding, CSU reserves, campus academic reserves, campus self-support reserves, and other sources. This includes over $500 million in public-private partnerships, used for a mix of student housing, parking and other transit infrastructure, and co-located facilities such as an academic training facility, charter school, and hotel.

It is important to note that many of the revenue sources associated with SRB Self Support bonds do not align with the required investment in a new campus. For example, funding from the Associated Students Incorporated (ASI) is generally used by campuses for student facilities and dining projects, but would not be available during early phases of construction. Due to the limited availability of state financing options, the CSU may also need to consider alternative models to fund construction for a new campus in one or more of the Five Evaluated Locations.

Figure 6.2 Five-Year Capital Project Funding Sources (2015/16 – 2019/20)



Source: California State University Office of the Chancellor, Capital Planning, Design and Construction. (2019). California State University Five-Year Plan – 2015/16 through 2019/2020.

PARTNERSHIPS

Approximately 30 percent of existing CSU campuses plan to utilize public-private partnership structures in the next five years to deliver capital projects. While traditionally used for revenue-generating projects, a public-private partnership can be used for academic buildings at a variety of scales. The University of California, Merced is currently undertaking one of the largest public-private partnership projects in U.S. higher education, supporting enrollment growth to 10,000 students and expanding the campus by 790,000 assignable square feet of academic and revenue-generating facilities. The project uses an "availability payment" model in which annual payments, which cover the private entity's debt service and maintenance costs, are contingent on building performance meeting established thresholds. However, the project still requires significant investment from the state: Of the $1.338 billion budget, $600 million is from university-issued financing (including a portion supported by State General Funds), $590 million is funded by the developer, and $148 million by campus funds. California State University, Fresno and University High School currently utilize a public-public partnership to operate the free public charter high school on the CSU campus. Partnerships like these are increasingly viable delivery options for the CSU and should be considered as an opportunity to reduce risk and debt financing burden.

6.2.2 MUNICIPALITY AND COUNTY RESOURCES

All of the Five Evaluated Locations are assumed to have similar access to a variety of bond financing tools. This section highlights key differences in access to non-traditional capital funding sources.

CITY OF CHULA VISTA

The City of Chula Vista is the only Evaluated Location with a proposed financing plan. The City of Chula Vista has proposed an Enhanced Infrastructure Financing District (EIFD) to leverage a portion of the City of Chula Vista's and the County of San Diego's future property tax revenues associated with adjacent development to support campus funding, which could include both facilities and operations. The City of Chula Vista estimates these revenues could eventually reach $5.2 million annually, although it is not clear that the County of San Diego would approve dedication of future property tax revenues. The City of Chula Vista also anticipates future revenue from ground lease payments (as much as $13.3 million annually) and revenue from a Community Facilities District ($10.5 million annually) that, in addition to sales tax revenues ($1.8 million annually), could be dedicated to a campus. The City of Chula Vista estimates that the present value of these revenue streams over 30 years could total as much as $152.8 million.

Stakeholders indicated that the City of Chula Vista is well positioned to deliver campus infrastructure through a public-private partnership, potentially reducing costs. HomeFed Corporation controls the property around the University and Innovation District as master developer and proposes mixed-use development, possibly including student housing and market-rate housing. Additionally, the City of Chula Vista owns the Chula Vista Elite Athlete Training Center, formerly the Olympic Training Center and near to the University and Innovation District site, which the City of Chula Vista indicated could be used for campus athletics and academic programming. The center could potentially also generate auxiliary revenue through event space rentals during non-peak academic times.

The City of Chula Vista has indicated that land could be made available to the CSU at no cost. As the University and Innovation District is a greenfield site, stakeholders emphasized that the land is "shovel-ready," limiting necessary demolition and reducing construction costs.

CITY OF CONCORD

The City of Concord Blue Ribbon Committee Report underscored the planned utilization of partnerships for delivery and operation of an academic campus at the Concord Reuse Project Campus District site. As such, the Blue Ribbon Committee Report outlines suggested marketing and communications steps to identify and secure partners, including a proposed "Launch Team" and eventual governance system for the Campus District. Although the Blue Ribbon Committee Report identifies a dozen public and private organizations as potential partners, no specific partnerships have been confirmed.

CITY OF PALM DESERT

Stakeholders noted that the CSUSB Palm Desert Campus has recurring fundraising events and a track record of philanthropic contributions, indicating a strong platform for continued fundraising to contribute to campus development. The 2016 CSUSB Palm Desert Campus Master Plan Report identified an aggressive capital campaign in the Coachella Valley, indicating that the surrounding community has historically generously supported the growth of the campus. However, stakeholders noted that the level of fundraising was not commensurate with the perceived wealth of the surrounding community, due in part to the Palm Desert Campus's association with CSUSB.

The two campus development scenarios at this site are two of the least costly evaluated across all Five Evaluated Locations. This is because capital investments have already been made in the CSUSB Palm Desert Campus, including laboratory and lecture space, library and auditoria space, and administrative support space.

SAN JOAQUIN COUNTY (STOCKTON)

Within San Joaquin County, both the Stockton University Park site and San Joaquin County Fairground site are located within California Opportunity Zones, which offer capital gains tax incentives to accelerate private capital investment. While this incentive cannot be used by the CSU and thus will not impact the overall financing of state-supported infrastructure, it could help incentivize adjacent development and enhance public-private partnership opportunities. From a fundraising perspective, stakeholders noted that the City of Stockton has a strong recent track record of attracting national philanthropy to improve access to higher education, including a recent $20 million grant to launch the "Stockton Scholars" program.

Stakeholders indicated that the San Joaquin County Fairground site could be made available at no cost; however, due to the required demolition of existing buildings, there is additional capital investment required for this site as compared to greenfield sites.

SAN MATEO COUNTY

Stakeholders in San Mateo County noted the historical success of local bond measures to support capital investment in San Mateo County community colleges. No capital investments are anticipated to be required to support a University Center development scenario, which is assumed to be located within underutilized facilities at the existing Cañada College site. In recent years, the San Mateo County Community College District has constructed a new Kinesiology and Wellness Center, including educational fitness facilities, and a new Math, Science and Technology Building.

6.2.3 STATE CAPITAL FUNDING NEEDS FOR IDENTIFIED SITES

Per Education Code 89773, the CSU legislative debt limit is capped so that debt service for capital expenditures and pay-as-you-go capital outlay projects cannot exceed "12 percent of its General Fund support appropriation, less the amount of that appropriation that is required to fund general obligation bond payments and State Public Works Board rental payments."[1] For each campus development scenario, capital costs are conservatively assumed to be financed through SRB either in the Academic Program or Self Support program. Only debt associated with Academic Programs is repaid by a combination of state funding, tuition, and fees through the systemwide budget, and thus is the only construction cost evaluated when calculating annual debt service (see Table 6.3). All capital costs for programs and sitework are assumed to be Academic Programs with four exceptions: residential life and housing, student recreation and wellness, student union, and parking structures. The method of delivery for these exceptions (assumed to be funded through Self Support and cost-neutral to the systemwide budget) would not change the costs outlined in Table 6.3. Campus development scenarios have varying costs based on the assumed physical programs, while costs vary between sites due to various sitework and location factor costs, as discussed further in Sections 5.2–5.6. Because the figures here are shown in present dollars, they are subject to change based on deviation from the schedule of implementation of individual campuses shown in Section 6.4.

This Report assumes a new 7,500 FTES Traditional Campus, a 7,500 FTES Branch Campus, or a 500 FTES University Center at each Identified Site (see Section 5.1, Table 5.1). Capital costs at each of the Five Evaluated Locations are shown in Table 6.3 as both the total project cost, which includes Academic and Self-Support projects, and the Present Value (PV) of cost to the

Table 6.3 Estimated Annual Debt Service by Site and Campus Development Scenario

Evaluated Location	Site	Campus Development Scenarios*	Total Project Cost	Present Value of Total Cost to the CSU (2020$)	Annual Debt Service	Annual Debt Service as a Percent of CSU General Fund Appropriation
Chula Vista	Chula Vista University and Innovation District	7,500 FTES Traditional Campus	$2.3 billion	$2.1 billion	$130 million	3.2%
Chula Vista	Chula Vista University and Innovation District	7,500 FTES Branch Campus	$2.1 billion	$1.8 billion	$109 million	2.7%
Concord	Concord Reuse Project Campus District	7,500 FTES Branch Campus	$2.6 billion	$2.5 billion	$149 million	3.7%
Concord	Concord Reuse Project Campus District	500 FTES University Center	$0	$0	$0	-
Palm Desert	CSUSB Palm Desert Campus	7,500 FTES Traditional Campus	$2.2 billion	$2.2 billion	$117 million	2.9%
Palm Desert	CSUSB Palm Desert Campus	7,500 FTES Branch Campus	$1.9 billion	$1.8 billion	$98 million	2.4%
San Joaquin County	Stockton University Park	7,500 FTES Branch Campus	$2.4 billion	$2.4 billion	$139 million	3.5%
San Joaquin County	San Joaquin County Fairground	7,500 FTES Traditional Campus	$2.4 billion	$2.2 billion	$134 million	3.3%
San Joaquin County	Stockton Education and Enterprise Zone	7,500 FTES Traditional Campus	$2.6 billion	$2.5 billion	$152 million	3.8%
San Mateo County	San Mateo County CCD – Cañada College	500 FTES University Center	$0	$0	$0	-

Source: HR&A Advisors analysis of MGAC construction cost estimates.

** This Report evaluates both a 7,500 FTES Traditional Campus typology and a 15,000 FTES Traditional Campus typology, but due to the long and uncertain implementation timeline, construction costs for a 15,000 FTES Traditional Campus typology are not shown.*

1. California Code, Education Code - EDC § 89773

CSU and annual debt service payments, which represents the true total cost of state-supported construction on Academic projects, including the cost of interest and issuance of revenue bonds. Bond payments are calculated over a 30-year period and assume a 5.5 percent interest rate and 10 percent cost of issuance, including capitalized interest. A 1 percent change (to 4.5 or 6.5 percent) to assumed interest rates would decrease or increase total costs by roughly 12 percent.

This Report estimates minimal state-funded investment required for a new 500 FTES University Center (San Mateo County CDD – Cañada College and Concord Reuse Project Campus District).

This Report estimates a new 7,500 FTES Branch Campus would require a total Present Value (PV) of approximately $1.8 billion (CSUSB Palm Desert Campus), $1.8 billion (Chula Vista University and Innovation District), $2.4 billion (Stockton University Park), and $2.5 billion (Concord Reuse Project Campus District) of state budget allocation for Academic Program facilities. This would require a debt service allocation of $98 million, $109 million, $139 million, and $149 million, respectively. Construction costs in the City of Concord are estimated to be higher than for other sites in large part due to a 15 percent cost premium associated with high labor and material costs in the Bay Area.

This Report estimates a new 7,500 FTES Traditional Campus would require a total PV of approximately $2.2 billion (CSUSB Palm Desert Campus), $2.1 billion (Chula Vista University and Innovation District), $2.2 billion (San Joaquin County Fairground), and $2.5 billion (Stockton Education and Enterprise Zone) of state budget allocation for Academic Program facilities. This would require a debt service allocation of $117 million, $130 million, $134 million, and $152 million, respectively.

Currently, the CSU uses roughly 5.1 percent of the adjusted General Fund support appropriation for capital funding, leaving 6.9 percent or $277 million available for annual debt service. No campus development scenario exceeds this limit, and thus construction of a single development scenario would not have an impact on the CSU's ability to comply with the Education Code debt limit. However, debt service for construction of a new campus would require substantial allocation of additional funding by the State Legislature to avoid an impact on operating budgets of other CSU campuses.

6.3 Operating Costs Analysis

6.3.1 OPERATING COSTS APPROACH AND CONTEXT

This analysis utilizes existing campus operating costs and budgets to develop cost models for an illustrative Operating Fund budget allocation for a new CSU campus in various configurations: a small campus, a medium-sized campus, a Branch Campus, an Off-Campus Center, and a University Center. These costs are separate from the capital cost required to construct each model, which are discussed above in Sections 6.1 and 6.2. The CSU Operating Fund is funded by the State General Fund and student tuition and fees. The Operating Fund of an individual campus represents the budget allocation required to support campus instruction and operations, independent of certain cost-neutral functions such as housing, parking, and some student services, which are funded by student fees. As explained further below, this analysis is intended to inform the ongoing state budget allocations required for the successful development, growth, and stabilization of a new CSU campus.

For the purposes of this analysis, a traditional "small" campus is defined as 7,500 FTES and a traditional "medium"-sized campus is defined as 15,000 FTES.[1] In Fall 2018, the average campus size across the CSU system is approximately 18,000 FTES. The analysis uses actual expenditures from representative campuses selected in consultation with the CSU Office of the Chancellor to serve as appropriate models for small and medium-sized campus operating models. The analysis also considers average expenditures per FTES from all similarly sized campuses for certain program groups (i.e., budget line item categories). A "Branch" Campus is organizationally linked with a larger, traditional campus, but geographically separate and defined by the following four criteria: 1) It is permanent in nature; 2) It offers a complete curriculum resulting in a degree, certificate, or other recognized educational credential; 3) It has its own faculty and an administrative or supervisory leadership entity; and 4) It has its own budgetary hiring authority. As the CSU does not have an existing Branch Campus, this analysis develops a Branch Campus operating model by reducing certain costs from the small campus operating model, such as admissions and other back-of-house functions, executive management, and general administration in the student services and institutional support program groups to reflect shared administration with a main campus. The analysis also develops an operating costs model for a 1,500 FTES Off-Campus Center, a small satellite campus of a larger campus, with shared administration, limited on-site services, and a focused academic program. This model is based on actual expenditures from larger campuses and existing Off-Campus Centers, assumes an Off-Campus Center is organizationally linked with a medium-sized campus, and includes operating costs for support functions provided by a main campus.[2] The University Center (similar to an Off-Campus Center, but with typically lower enrollment and more flexibility in the types of courses offered and often co-located with another university or institution) is also based on actual expenditures from a larger campus, with which it would be organizationally linked, and estimated expenditures for space costs and on-site administrative support. At the current rate of state investment, small campuses already do not generate or receive operating funds sufficient to invest in higher cost degree programs, facilities, and student services. Expanding operations to an off-campus location (Branch Campus, Off-Campus Center, or University Center) and sustaining those over the long term is highly challenging for a small campus, regardless of type, as they are less likely to have operating funding available to cover the additional costs associated with a second location.

The analysis considers state contributions to campus operations through the CSU Operating Fund. Small Traditional Campuses, small Branch Campuses, Off-Campus Centers, and University Centers require higher levels (roughly 70 percent) of state support for operating funding, with remaining funds generated from student tuition and fee revenue, whereas medium-sized campuses generally require approximately 55 percent state support due to their higher level of tuition and fee revenue. Operational costs and expected state contributions in all operational models are expressed in 2020 dollars.[3]

Data in the following figures represent Operating Fund costs for individual campuses and reflect the complete cost of education, not the CSU systemwide marginal cost of instruction. The marginal cost of instruction is a measure of incremental cost per FTES used to request annual funding from the State Legislature and does not include base costs, such as administration, that remain relatively fixed as the number of FTES increases. This Report finds that annual operating costs of any new campus range from $13,750 to $17,000 per FTES. The marginal cost of instruction, a methodology used by the CSU and state to allocate funding on a per-student basis to existing campuses, is $11,300 per FTES for 2019–2020.[4] The operating costs models are illustrative and subject to variation based on academic program and length of time in operation. Larger and older Traditional Campuses are generally less expensive to operate on a per-FTES basis, whereas smaller, newer Traditional Campuses are generally more expensive to operate on a per-FTES basis. Off-Campus Centers and University Centers are generally less expensive to operate than a small Traditional Campus, as they benefit from efficiencies of scale associated with services provided remotely by a medium-sized campus. However, Off-Campus Centers and University Centers have higher costs than a medium-sized campus on a per-FTES basis, due to their lower enrollment and higher costs per FTES for on-site administration and facilities operations and maintenance.

1. A traditional campus delivers a full breadth of curriculum and in-person academic spaces from a single geographic location. The campus also offers the full spectrum of other campus-related functions, such as (but not limited to) residential life, student recreation and wellness, general administration, auditoria and exhibition, library, student union, and central plant and facilities support.
2. An Off-Campus Center is established when an institution either rents or acquires a facility from which it intends to offer a number of academic courses and programs supported by the home campus budget.
3. Costs from recent CSU budgets were inflated to 2020 dollars using the U.S. Bureau of Labor and Statistics Consumer Price Index for All Urban Consumers.
4. The California State University. *2019–2020 Marginal Cost of Instruction*. https://www2.calstate.edu/csu-system/about-the-csu/budget/2019-20-operating-budget/enrollment/Pages/2019-20-marginal-cost-of-instruction.aspx

Table 6.4 Medium-Sized Campus 15,000 FTES Operating Fund Costs Model

Program Groups	Annual Operating Fund Costs per FTES	Annual Operating Fund Costs
01 Instruction	$5,850	$87,750,000
02 Research	$50	$750,000
03 Public Service	$50	$750,000
04 Academic Support	$1,450	$21,750,000
05 Student Services[1]	$1,700	$25,500,000
06 Institutional Support	$1,450	$21,750,000
07 Operation and Maintenance of Plant	$1,550	$23,250,000
08 Student Grants and Scholarships	$1,650	$24,750,000
Subtotal	$13,750	$206,500,000
20 Auxiliary Enterprise Expenses[2]	$0	$0
Total	**$13,750**	**$206,500,000**

[1] *Based on average 2016–2018 operating costs for similarly sized campuses.*
[2] *Auxiliary Enterprise Expenses are self-supporting and not funded by the CSU Operating Fund.*

Source: California State University Campuses Actual Expenses (2016–2018), adjusted to 2020 dollars by HR&A Advisors, Inc.

Table 6.5 Small Campus 7,500 FTES Operating Fund Costs Model

Program Groups	Annual Operating Fund Costs per FTES	Annual Operating Fund Costs
01 Instruction	$6,300	$47,250,000
02 Research	$50	$500,000
03 Public Service	$50	$500,000
04 Academic Support	$2,100	$15,750,000
05 Student Services[1]	$2,250	$17,000,000
06 Institutional Support	$2,500	$18,750,000
07 Operation and Maintenance of Plant	$1,800	$13,500,000
08 Student Grants and Scholarships	$1,850	$14,000,000
Subtotal	$17,000	$127,500,000
20 Auxiliary Enterprise Expenses[2]	$0	$0
Total	**$17,000**	**$127,500,000**

[1] *Based on average 2016–2018 operating costs for similarly sized campuses.*
[2] *Auxiliary Enterprise Expenses are self-supporting and not funded by the CSU Operating Fund.*

Source: California State University Campuses Actual Expenses (2016–2018), adjusted to 2020 dollars by HR&A Advisors, Inc.

6.3.2 FULL CURRICULAR PROGRAM ILLUSTRATIVE CAMPUS TYPOLOGIES

TRADITIONAL CAMPUS (7,500 AND 15,000 FTES)

The estimated annual Operating Fund budget for a medium-sized Traditional 15,000 FTES Campus (see Table 6.4) is estimated to be approximately $206.5 million, or $13,750 per FTES. The annual Operating Fund budget for a smaller, 7,500 FTES Traditional Campus (see Table 6.5) is estimated to be approximately $127.5 million, or $17,000 per FTES (slightly lower than the 2019–2020 Operating Fund Budget Allocations for the Channel Islands and Monterey Bay campuses, which are approximately $20,000 per FTES), and approximately 20 percent higher per FTES than a medium-sized Traditional Campus.

BRANCH CAMPUS

The small Branch Campus operating costs model (see Table 6.6) is based on the illustrative small campus typology (see Table 6.5), with reduced costs in certain categories to account for shared operations with another medium-sized campus. The Branch Campus model has lower per-FTES costs for student services and institutional support, which reduces costs related to executive management and general administration, as compared to the small campus model. The resulting annual Operating Fund budget for a 7,500 FTES Branch Campus is estimated to be approximately $116.5 million, or $15,500 per FTES, and approximately 10 percent lower than the small campus model.

6.3.3 PARTIAL CURRICULAR PROGRAM ILLUSTRATIVE CAMPUS MODELS

OFF-CAMPUS CENTER

This Report estimated the operational costs of an Off-Campus Center, which is a common campus typology within the CSU system, although it was not identified as the most appropriate development scenario for any of the Five Evaluated Locations. The expected annual Operating Fund budget for a 1,500 FTES Off-Campus Center (see Table 6.7) is estimated to be

Table 6.6 Branch Campus 7,500 FTES Operating Fund Costs Model

Program Groups	Annual Operating Fund Costs per FTES	Annual Operating Fund Costs
01 Instruction	$6,300	$47,250,000
02 Research	$50	$500,000
03 Public Service	$50	$500,000
04 Academic Support	$2,100	$15,750,000
05 Student Services[1]	$2,050	$15,500,000
06 Institutional Support	$1,250	$9,500,000
07 Operation and Maintenance of Plant	$1,800	$13,500,000
08 Student Grants and Scholarships	$1,850	$14,000,000
Subtotal	$15,500	$116,500,000
20 Auxiliary Enterprise Expenses[2]	$0	$0
Total	**$15,500**	**$116,500,000**

[1]*Based on average 2016–2018 operating costs for similarly sized campuses.*
[2]*Auxiliary Enterprise Expenses are self-supporting and not funded by the CSU Operating Fund.*

Source: California State University Campuses Actual Expenses (2016–2018); HR&A Advisors, Inc.

Table 6.7 Off-Campus Center 15,000 FTES Operating Fund Costs Model

Program Groups	Annual Operating Fund Costs per FTES	Annual Operating Fund Costs
01 Instruction	$5,850	$8,800,000
02 Research	$50	$50
03 Public Service	$50	$50
04 Academic Support	$1,450	$2,250,000
05 Student Services	$1,700	$2,500,000
06 Institutional Support[1]	$2,250	$3,500,000
07 Operation and Maintenance of Plant[1]	$2,450	$3,750,000
08 Student Grants and Scholarships	$1,650	$2,750,000
Subtotal	$15,500	$23,500,000
20 Auxiliary Enterprise Expenses	$0	$0
Total	**$15,500**	**$23,500,000**

[1]*Based on average 2017–2019 Off-Campus Center operating costs.*

Source: California State University Campuses Actual Expenses (2016–2018); HR&A Advisors, Inc.

approximately $23.5 million, or $15,500 per FTES. An Off-Campus Center is assumed to be linked with a medium-sized Traditional Campus and have similar operating costs in most categories, particularly for programs provided by a main campus. Off-Campus Center costs on a per-FTES basis for institutional support and operation and maintenance of plant are higher than the medium-sized campus model, as these on-site program groups have fewer efficiencies of scale. An Off-Campus Center is more expensive to operate, on a per-FTES basis, than a medium or large Traditional Campus due to these limited efficiencies of scale. Accordingly, operating an Off-Campus Center is approximately 12 percent more expensive than growing FTES at a larger campus, although Off-Campus Centers offer a more limited range of curriculum and student support services. If the Off-Campus Center is linked with a campus smaller than 15,000 FTES, Operating Fund costs could be substantially higher.

UNIVERSITY CENTER

The University Center illustrative operating costs model (see Table 6.8) is similar to the Off-Campus Center model in most categories, and similarly assumed to be linked with a medium-sized campus of at least 15,000 FTES like the Off-Campus Center. The annual Operating Fund budget of a 500 FTES University Center is estimated to be approximately $7.5 million, or $14,500 per FTES. Due to its association with a medium-sized campus, most University Center operating costs are assumed to be similar to the medium-sized campus on a per-FTES basis, with slightly higher institutional support costs due to the less efficient nature of providing these services to a small campus population. This costs model assumes that a University Center would be co-located with a California Community College or other institution, and would not be responsible for market rate rent, but rather a fair share of day-to-day operational costs, which are benchmarked to the CSU 2019/2020 custodial budget allocation on a per-square-foot basis. A University Center is assumed to occupy roughly 60,000

Table 6.8 University Center 500 FTES Operating Fund Costs Model

Program Groups	Annual Operating Fund Costs per FTES	Annual Operating Fund Costs
01 Instruction	$5,850	$2,950,000
02 Research	$50	$0
03 Public Service	$50	$0
04 Academic Support	$1,450	$750,000
05 Student Services	$1,700	$850,000
06 Institutional Support[1]	$2,250	$1,150,000
07 Operation and Maintenance of Plant[2]	$1,450	$750 ,000
08 Student Grants and Scholarships	$1,650	$850,000
Subtotal	$14,500	$7,500,000
20 Auxiliary Enterprise Expenses	$0	$0
Total Costs	**$14,500**	**$7,500,000**

[1] *Institutional support costs are based on average 2017–2019 Off-Campus Center operating costs, since Off-Campus Centers and University Centers have similar scales of enrollment.*

[2] *Operations and maintenance of plant costs are estimated using the $12 per square foot 2019/2020 custodial budget allocation. Operations and maintenance costs for leased space vary widely in California and will likely be higher depending on lease structure and market conditions.*

Source: California State University Campuses Actual Expenses (2016–2018); HR&A Advisors, Inc.

Table 6.9 State Support for Illustrative Campus Models at Stabilization

Campus Model	Annual Operating Fund Costs per FTES	Percent State Support	Annual State Contribution per FTES	Total State Contribution
Full Curricular Program				
Medium-Sized Campus (15,000 FTES)	$13,750	55%	$7,500	$116,500,000
Small Campus (7,500 FTES)	$17,000	70%	$12,000	$90,000,000
Branch Campus (7,500 FTES)	$15,500	70%	$10,750	$80,500,000
Partial Curricular Program				
Off-Campus Center (1,500 FTES)[1]	$15,500	70%	$10,750	$16,000,000
University Center (500 FTES)[1]	$14,500	70%	$10,250	$5,000,000

[1] *Off-Campus Centers and University Centers are assumed to be organizationally linked with a medium-sized (15,000 FTES) campus.*

Source: California State University Campuses Actual Expenses (2016–2018); California State University Campuses Final Budget Allocation (2019–2020); HR&A Advisors, Inc.

SF; if located in leased space, Operations and Maintenance costs could be substantially higher, depending on real estate market conditions. This analysis estimates that operating a University Center is approximately 5 percent more expensive than growing FTES at a larger campus, although University Centers offer a more limited range of curriculum and student support services. If the University Center is linked with a campus smaller than 15,000 FTES, Operating Fund costs could be substantially higher.

6.3.4 STATE FINANCIAL SUPPORT CONSIDERATIONS FOR ILLUSTRATIVE CAMPUS MODELS

CSU operations are funded by state appropriations from the State General Fund (referred to as "state support") and tuition and fee revenue paid by students. On average systemwide, approximately 51 percent of existing campus operating budgets are funded by state support, with the largest campuses requiring the smallest share of state support (in some cases as low as 44 percent) and reducing the average overall. Generally, smaller, newer campuses, such as Channel Islands and Monterey Bay, require approximately 70 percent state support. As campuses grow and become more established, they achieve certain operating cost efficiencies or economies of scale and generate a more significant share of tuition and fee revenue to fund operations. As such, medium-sized campuses are generally less dependent on state support; approximately 55 percent of total operating revenue is from state support.[5] Off-Campus Centers and University Centers are expected to require 70 percent support to be fiscally sustainable in order to allow main campuses to continue their operations through more constrained fiscal environments and offset limited tuition and fee revenue on a regular basis. It should be noted that current Off-Campus Center and University Center state support budget allocations are not funded differently than main campuses.

Estimated required state support contributions for each of the campus models shrink as operating efficiencies reduce per-FTES

5. Based on 2019–2020 final budget allocations.

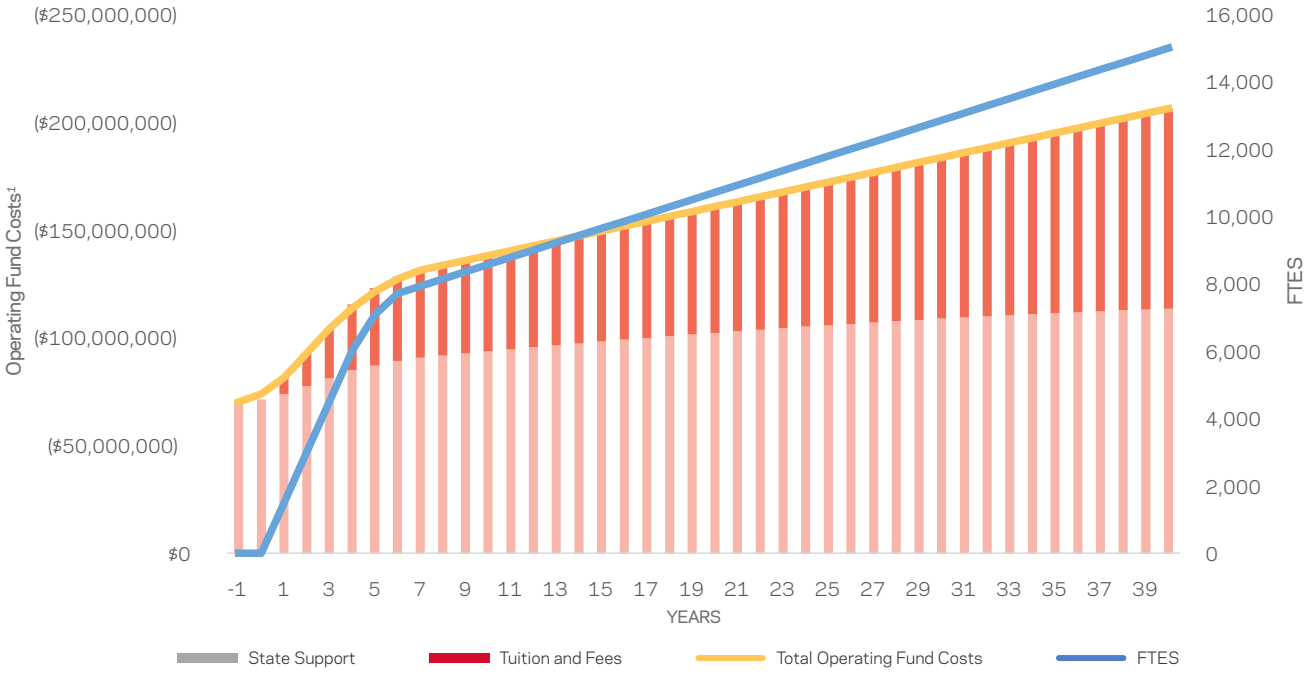
costs over time (see Table 6.9). This Report assumes a target for new Traditional and Branch Campuses to enroll 7,500 FTES within five years of opening, an aggressive growth rate that although unprecedented in recent decades, demonstrates the scale of funding necessary to move a campus from conceptualization to financial sustainability. The percentage of state support shown in Table 6.9 (70 percent) represents a stabilized year with 7,500 FTES. These campuses would require substantially higher percentages of state support in their initial years to reach 7,500 FTES within five years. This is due in part to high levels of state support required in advance of opening and in initial years when tuition and fee revenue is lowest as compared to total operating costs, to allow campuses to add faculty and staff capacity in advance of enrollment growth.

This analysis assumes that small campuses would stabilize in year 5 at approximately 70 percent state support, requiring a budget allocation of roughly $90.0 million or $12,000 per FTES (slightly more conservative than 2019–2020 allocated state support for Channel Islands or Monterey Bay at $14,100 and $13,300 per FTES, respectively). A medium-sized campus would stabilize after 40 years at approximately 55 percent state support, requiring a budget allocation of $116.5 million or $7,750 per FTES (similar to and slightly more conservative than Chico or Dominguez Hills at $8,600 and $7,800 per FTES, respectively). Absent any precedent, this analysis anticipates that a Branch Campus would require a scale of state support similar to the small campus, although efficiencies of scale may be achieved if a Branch Campus is organizationally linked to a larger campus (larger than 15,000 FTES).

State support for an Off-Campus Center is assumed to require $16 million or $10,750 per FTES, approximately 40 percent higher than a medium-sized campus ($7,500 FTES), although Off-Campus Centers offer a more limited range of curriculum and student support services. A University Center is assumed to require a budget allocation of $5.0 million or $10,250 per FTES, slightly lower than the Off-Campus Center model but still higher than the medium-sized campus on a per-FTES basis, although University Centers similarly offer a more limited range of curriculum and student support services. Both the Off-Campus Center and University Center would require higher shares of state support to offset limited tuition and fees and to incentivize operation. If an Off-Campus or University Center were associated with a small campus (smaller than 15,000 FTES), overall costs and share of state support is likely to be even higher. Implementation of all development scenarios would require an increased allocation of state support to the CSU system to fund operations to a point of sustainability and to prevent redirection of funds from other campuses; expansion of an existing campus with additional Master Plan capacity would have lower operational costs per FTES and require less state support than other campus models.

As shown in Figure 6.3, during the first five years of operation, a new campus would need to be primarily funded by state support for a campus to grow to 7,500 FTES, an unprecedented rate. Due to economic challenges and enrollment demand, Channel Islands and Monterey Bay (CSU's newest campuses) have still not reached 7,500 FTES in 18 and 26 years of operation, respectively. The rate of growth used in this analysis assumes enrollment demand levels that are higher than projected by this Report (see Section 3.3 for

Figure 6.3 New Campus Operating Fund Costs and FTES Growth Over Time



[1] *Operating Fund costs are expressed in 2020 dollars and are not inflated over time.*

Source: California State University Campuses Actual Expenses (2016–2018); California State University Campuses Final Budget Allocation (2019–2020); HR&A Advisors, Inc.

enrollment projections) and are intended to illustrate the level of state support over time to support campus growth, as well as the economic inefficiencies of campuses operating well below 7,500 FTES for an extended time. Initial years of campus operation, including at least two years in advance of enrolling students, would require state support of approximately $70.1 million dollars per year to fund administration, hire faculty to develop academic programs, and initiate campus operations. Furthermore, operational resources in the CSU Office of the Chancellor would be required at least five to 10 years in advance of campus operations for planning, design, and development of a new campus.

In year 5, total Operating Fund budget is estimated to reach approximately $128.6 million or $17,000 per FTES, with 70 percent state support ($90.0 million) and 30 percent tuition and fee revenue (see Figure 6.3). As a campus continues to grow beyond 7,500 FTES, student tuition and fees account for a larger portion of Operating Fund revenue, requiring a smaller share of state support. Between years 5 and 40, the number of FTES is anticipated to increase at a constant rate, while the share of state support would decrease to 55 percent. The total Operating Fund budget would continue to increase as the campus grows along with tuition and fee revenue, reaching $211.8 million or $14,000 per FTES in year 40, while state support increases at a much more modest rate to roughly $116.5 million in year 40.

6.3.5 OPERATING BUDGET CONSIDERATIONS

In addition to campus size, the scale of tuition and fee revenue impacts the ability of each campus to deliver student services and workforce-aligned degree programs. The scale of CSU General Fund annual operating support per FTES is relatively similar for most campuses, ranging from $6,700 to $9,800 per FTES, except newer and smaller campuses (Channel Islands, Humboldt, Maritime, Monterey Bay) with scale diseconomies that render them much more expensive to operate. However, when accounting for tuition and fee revenue, the magnitude of operating budget per FTES for individual campuses varies more widely, ranging from $13,300 (Pomona) to as much as $37,300 (Maritime, which again is clearly an outlier).

Campuses with smaller populations and higher proportions of lower-income students (using Pell Grants as a proxy) are less able to raise additional funding through tuition and fee revenue to support student services and fund more expensive and workforce-aligned degree programs, and therefore would need additional state support for levels of service required to achieve better 10-year wage potential outcomes.

6.3.6 OPERATING COSTS FOR IDENTIFIED SITES

This Report assumes one of three development scenarios at each site: a new Traditional 7,500 FTES Campus, a 7,500 FTES Branch Campus, or a 500 FTES University Center at each Identified Site (see Section 5). A new 7,500 FTES Traditional Campus or Branch Campus is more burdensome to the CSU's Operating Fund and the state budget than a smaller University Center, in gross terms (see Table 6.9). Table 6.10 shows annual Operating Fund costs for each development scenario at each Identified Site.

Annual Operating Fund costs for a 7,500 FTES Traditional Campus in the Chula Vista University and Innovation District, CSUSB Palm Desert Campus, San Joaquin County Fairground, and Stockton Education and Enterprise Zone are approximately $127.5 million or $17,000 per FTES (see Table 6.5). Anticipated state funding at stabilization for a 7,500 FTES Traditional Campus is approximately 70 percent of total costs or $90.0 million (see Table 6.9).

Annual Operating Fund costs for a 7,500 FTES Branch Campus in the Chula Vista University and Innovation District, Concord Reuse Project Campus District, and Stockton University Park are approximately $116.5 million or $15,500 per FTES (see Table 6.6). Anticipated state funding at stabilization for a 7,500 FTES Branch Campus is approximately 70 percent of total costs of $80.5 million (see Table 6.9).

Annual Operating Fund costs for a 500 FTES University Center at the Concord Reuse Project Campus District and San Mateo County CCD – Cañada College are approximately $7.5 million or $14,500 per FTES (see Table 6.8). Anticipated state funding at stabilization for a 400 FTES University Center is approximately 70 percent of total costs or $5.0 million (see Table 6.9).

State support for an Off-Campus Center is estimated to require $16.0 million or $10,750 per FTES, lower on a per-FTES basis

Table 6.10 Annual Operating Fund Costs for Identified Sites

Identified Site	Campus Development Scenario	Annual Operating Fund Costs	Annual Operating Fund Costs per FTES
Chula Vista University and Innovation District	Traditional Campus (7,500 FTES)	$127,500,000	$17,000
	Branch Campus (7,500 FTES)	$116,500,000	$15,500
Concord Reuse Project Campus District	Branch Campus (7,500 FTES)	$116,500,000	$15,500
	University Center (500 FTES)	$7,500,000	$14,500
CSUSB Palm Desert Campus	Traditional Campus (7,500 FTES)	$127,500,000	$17,000
Stockton University Park	Branch Campus (7,500 FTES)	$116,500,000	$15,500
San Joaquin County Fairground	Traditional Campus (7,500 FTES)	$127,500,000	$17,000
Stockton Education and Enterprise Zone	Traditional Campus (7,500 FTES)	$127,500,000	$17,000
San Mateo Cañada College	University Center (500 FTES)	$7,500,000	$14,500

than the small campus and slightly higher than the medium-sized campus. A University Center is estimated to require a budget allocation of $5.0 million or $10,250 per FTES, slightly lower than the small campus, Branch Campus, and Off-Campus Center typology, and higher than the medium-sized campus on a per-FTES basis. Both the Off-Campus Center and University Center are assumed to be organizationally linked with established medium- or large-sized campuses and are unlikely to require a higher share of funding in early years. Implementation of all development scenarios would require an increased allocation of state support to fund scaling operations to a point of sustainability and to prevent redirection of funds from other campuses. Expansion of an existing campus with available Planned Capacity would have lower operational costs per FTES and require less state support than a new small or medium-sized campus or a new Branch Campus.

6.4 Schedule of Implementation

This Report assesses the timeline of implementation for campus development scenarios at each of the seven identified sites. These timelines are based on documentation available for these sites, analysis of precedent campus development projects, analysis of specific regulatory processes, and an understanding of the CSU process. In all cases, the implementation schedules are assumed to be best-case scenarios and are subject to extension associated with delays in discretionary approvals, regulatory processes, legal challenges, and construction-related factors or force majeure events. For new campus developments, the first day of classes is a key milestone, and the development timelines consider the processes and timeframes for each of the seven identified sites to reach this milestone. For the Traditional and Branch Campus developments, this Report identifies a minimum of 1,500 FTES at the first day of classes. This Report does not project a timeline for campus growth beyond the first day of classes, as each campus's unique enrollment demand, state funding, and other factors will impact the rate of growth. For example, CSU Channel Islands opened in 2002 and has grown in 18 years to roughly 6,400 FTES; CSU Monterey Bay opened in 1994 and has grown in 26 years to roughly 6,600 FTES.

6.4.1 TIMELINE PROCESSES

The timelines consider site-specific processes related to planning, operations, and site and building development for new campus development scenarios at each of the seven identified sites. Planning processes include initial allocation of start-up funds, master plan and land acquisition, master planning, environmental documentation, and the Five-Year Capital Outlay Plan development; at select sites, some of these components have already been completed and are recognized as such. Next, the timelines consider key operational steps, including the appointment of a President, recruitment of executive staff, academic curriculum development (occurring in conjunction with the physical master planning), recruitment of faculty and staff, and new student enrollment. The timelines also consider project design, development, and construction to support campus operations of the initial 1,500 FTES enrollment.

PLANNING

Allocation of Funding

Initial startup funds are needed to initiate the academic planning and physical planning of a new CSU campus development. The timelines presented in this Report use the moment of startup fund allocation as their starting point.

Master Plan and Land Acquisition/Land Transfer/Lease Negotiations

Once startup funds have been allocated, land can be acquired (if not already owned by the CSU) and a Master Plan can be developed. For the campus development scenarios evaluated in this Report, both a Traditional Campus and Branch Campus will require the CSU to own the land occupied by the new campus. Timeline for land acquisition can vary based on the unique conditions and type of acquisition. For a University Center, land acquisition is not required, as it can occupy leased space. For both the Traditional Campus and Branch Campus development scenarios, this Report assumes that the initial Master Plan is comprehensive and includes development to support 7,500 FTES through future phased growth.

Environmental Impact Report (EIR) Process

All campus developments will be required to prepare an EIR in order to obtain California Environmental Quality Act (CEQA) clearance. The EIR will propose mitigation measures the project can implement to reduce or avoid any significant adverse environmental impacts the campus development may cause. The timeframe for this process can vary greatly based on any previous EIRs completed for the site, what type of EIR may be required, and other site and project-specific conditions (see Appendix B.3).

Five-Year Capital Outlay Plan Development and Refinement

The Five-Year Capital Outlay Plan (or Five-Year Plan) is a report updated annually by the CSU that documents the priority projects (both for academic and self-support programs) across all campuses. Once reviewed and approved by the CSU Board of Trustees, it is then submitted to the Department of Finance for review.

Department of Finance (DOF) Approval

The Department of Finance includes action-year projects identified in the Five-Year Plan in the annual State Budget.

OPERATIONS

Appointment of President

The President of a new CSU campus can be appointed immediately following the initial allocation of funding to initiate executive staff hiring, faculty and staff hiring, and academic curriculum development. Alternatively, there is precedent for the appointment of an Interim Planning President, an existing CSU campus leadership, or the Office of the Chancellor to champion the new campus during the early implementation phases, but a President would need to be appointed prior to the first day of classes. In the case of a new Branch Campus or University Center, a new President would not be appointed, as these campuses would remain under the leadership of an existing CSU campus and President.

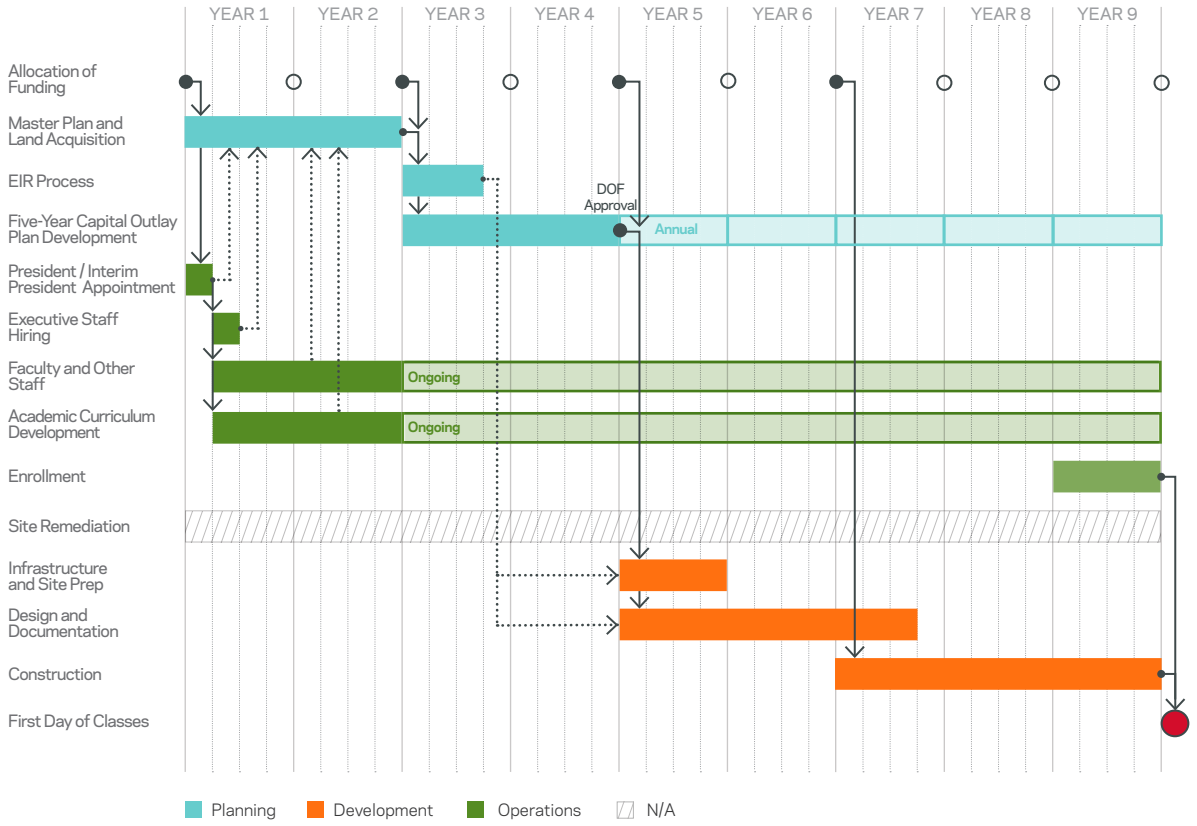
Executive Staff Hiring

The executive staff would be hired shortly after a President is appointed or another leadership strategy is established. A new Branch Campus is likely to include the hiring of Deans but would not require other executive leadership. For a University Center, there would be no new executive staff, as the administration would be shared with an existing CSU campus.

Faculty and Staff Hiring

Key faculty who would lead academic curriculum development would be hired shortly after the President is appointed. Additional faculty and staff hiring would be ongoing and start no later than two years prior to the first day of classes.

Figure 6.4 Chula Vista University and Innovation District - Traditional and Branch Campus



Academic Curriculum Development

Academic curriculum development would be developed in support of the campus mission immediately following the establishment of campus leadership and key faculty hires. For University Centers, the curriculum will be developed by and is likely to mirror that of the main campus. It is indicated as running concurrently with the Master Plan development activities, as the academic curriculum will impact the physical campus master planning.

Enrollment

The timelines indicate the period at which students would begin to enroll at a new CSU campus.

SITE AND BUILDING DEVELOPMENT

Site Remediation

In some cases, remediation of soils or existing buildings is required prior to being suitable for campus development. This Report identifies sites where there are known conditions requiring site and/or building remediation. The length of time this process may take is highly variable and could overlap with planning activities.

Design and Documentation

For Traditional Campus and Branch Campus development scenarios, this Report includes the duration for site, infrastructure, and building design and documentation of the initial campus development, which would include key academic facilities, administrative space, library space, and student services to accommodate a minimum of 1,500 FTES. This Report anticipates approximately three to five campus buildings would be required for the initial 1,500 FTES, which, after planning, could all be designed and documented concurrently in approximately two years. For a University Center, the design and documentation phase would include any renovations of existing facilities as required.

Construction

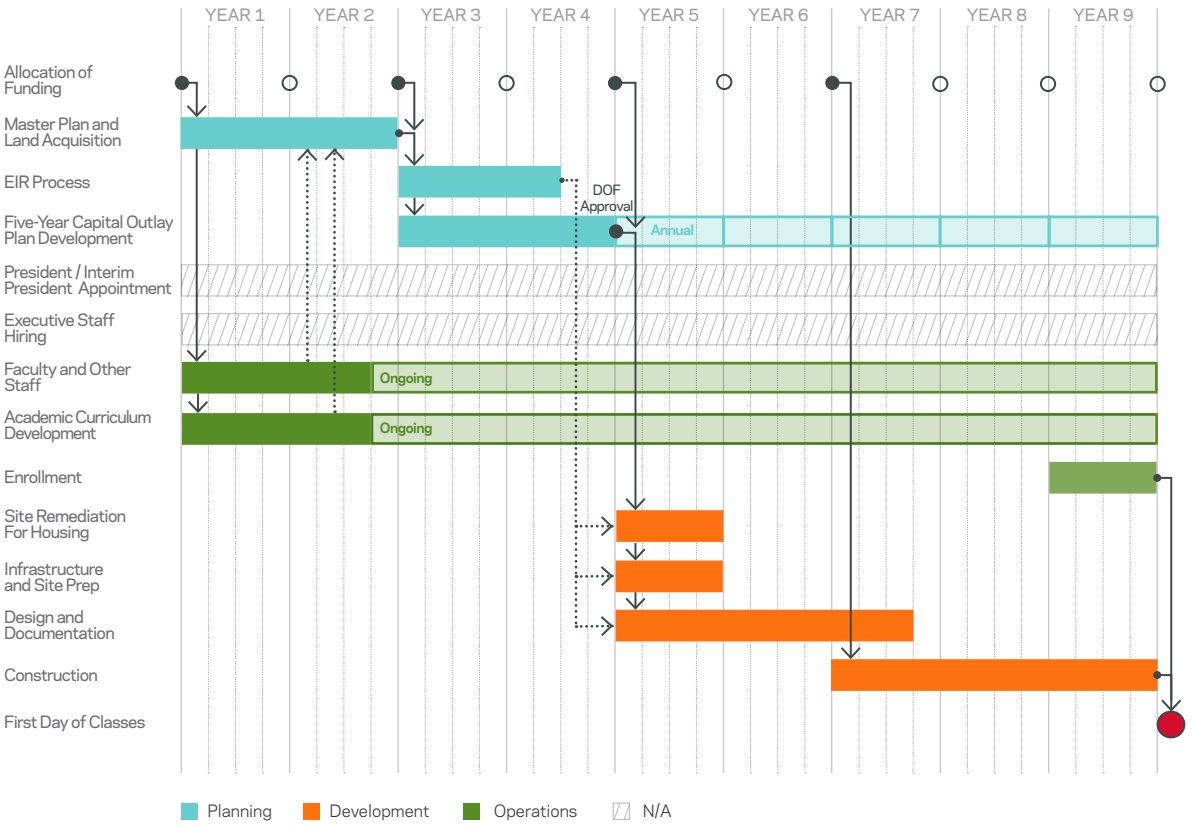
For Traditional Campus and Branch Campus development scenarios, this Report includes the estimated duration of three years for the site work and building construction of the initial campus development as described in the Design and Documentation description above. There are many methods of project delivery—e.g., Design-Bid-Build, Design-Build, Progressive Design-Build, Public Private Partnerships (P3), etc.—which the CSU utilizes for various projects across the system, some of which include financing models as discussed in Section 6.2. For University Centers, the construction phase would only be required if renovations to existing facilities were required.

6.4.2 EVALUATED LOCATION SCHEDULES

CHULA VISTA UNIVERSITY AND INNOVATION DISTRICT

This Report considers both a Traditional Campus and Branch Campus development scenario at the Chula Vista University and Innovation District site. For the purposes of establishing an implementation timeline, the Traditional Campus is illustrated in Figure 6.4, and descriptions are provided where the processes may be different. The timeline is anticipated to be the same for both a

Figure 6.5 Concord Reuse Project Campus District - Branch Campus



Traditional and Branch Campus at this location, as both require the same durations for planning and development phases, while some of the operational phases differ but would not shorten the overall timeline. This Report outlines the process for a Traditional Campus at the Chula Vista University and Innovation District site to take nine years of planning, development, and operational ramp-up to first day of classes.

Planning

This Report anticipates a similar planning schedule for all greenfield sites without current infrastructure for the Traditional or Branch Campus development scenarios. At the Chula Vista University and Innovation District site, the land is currently owned by the City of Chula Vista, and it is assumed the transfer process to CSU would not be time consuming and could be achieved during the two years allocated to physical master plan development. The Final EIR for the University and Innovation District was certified in 2018, and it is anticipated that an addendum taking approximately 6 to 9 months would be needed (see Appendix B.3).

Operations

This Report assumes that the CSU would appoint a President and recruit executive staff to direct the physical Master Plan and academic curriculum development process, followed closely by faculty recruitment. Curriculum development and faculty and staff hiring would be an ongoing process until the first day of classes.

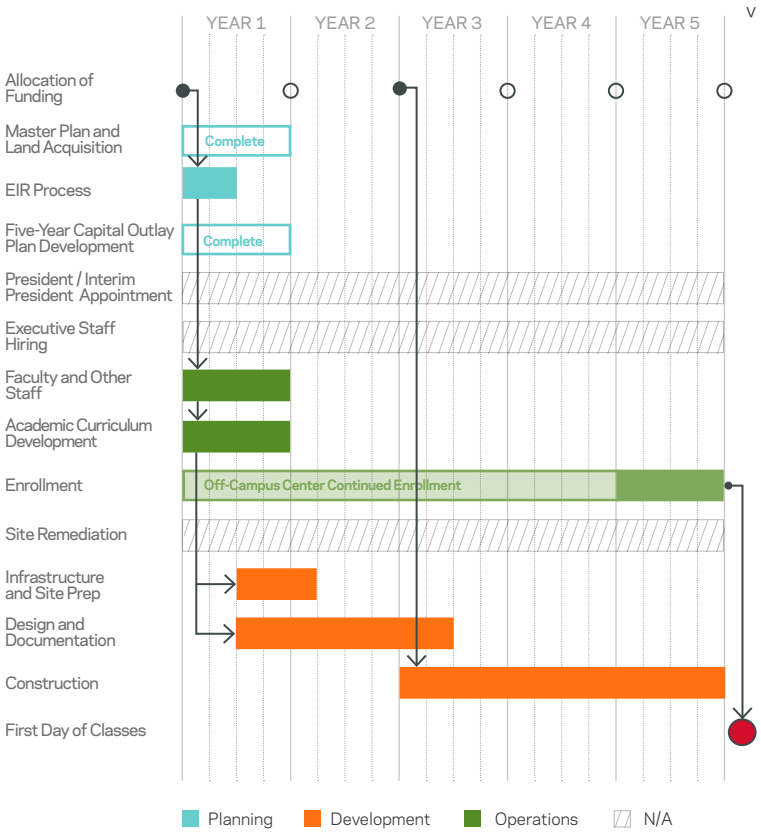
Development

The Chula Vista University and Innovation District site is located within the mixed-use project proposed by a private real estate developer, which includes the proposal for the infrastructure development and build-out of a new higher education campus. The site has significant topography, and at the time of this Report, grading across the site to accommodate a future master plan development is underway. This Report assumes that site and building design documentation and subsequent construction could commence immediately following DOF approval of the Five-Year Capital Outlay Plan and would take approximately five years.

CONCORD REUSE PROJECT CAMPUS DISTRICT

This Report anticipates that the schedule for development of a Branch Campus at the Concord Reuse Project Campus District site would be driven primarily by the availability of land, which is unlikely to be ready for vertical development until 2024. A University Center is also evaluated within this Report at the Concord Reuse Project Campus District site, which typically would occupy existing buildings (developed and owned by others), and the CSU would lease the needed space to deliver the academic curriculum. Given that this site does not have any existing buildings, the Branch Campus development was utilized for implementation analysis. Due to the delay in land transfer for vertical development, this Report assumes that at minimum a Branch Campus would require nine years for planning, operational, and development ramp-up to the first day of classes (see Figure 6.5).

Figure 6.6 CSUSB Palm Desert Campus - Branch Campus



Planning

This Report anticipates a similar planning schedule for sites without existing infrastructure. The land at the Concord Reuse Project Campus District site will be transferred from the United States Navy to the City, and site availability will rely on infrastructure build-out by a master developer, which has not yet been selected. Therefore, land transfer is unlikely to occur before 2024. Currently the EIR for the Concord Reuse Project Specific Plan is not yet complete. The CSU could participate in the Specific Plan EIR process if a campus is established within the EIR completion time period.

Operations

This Report assumes that California State University, East Bay would direct the physical master plan and academic curriculum development process. It is assumed that interim operations would continue at the existing Cal Sate East Bay Concord Campus Off-Campus Center, but continued faculty recruitment is likely to be delayed until building construction can commence.

Development

The Concord Reuse Project Campus District is located within the former Concord Naval Weapons Station, for which the City has yet to select and complete negotiations with a master developer. There is soil remediation needed across the entire development area, which the U.S. Navy has commenced; the Campus District site is anticipated to be remediated to a standard certified for institutional use, but not for residential uses. If the CSU were to include a residential component within the Campus District, additional soil remediation would be required. There are other areas within the Reuse Project planned for residential construction that will undergo the associated remediation requirements. The Campus District site will not be available for vertical development until 2024. However, this Report assumes that environmental remediation, infrastructure, and site preparation could proceed in advance of 2024, with building design and construction to follow.

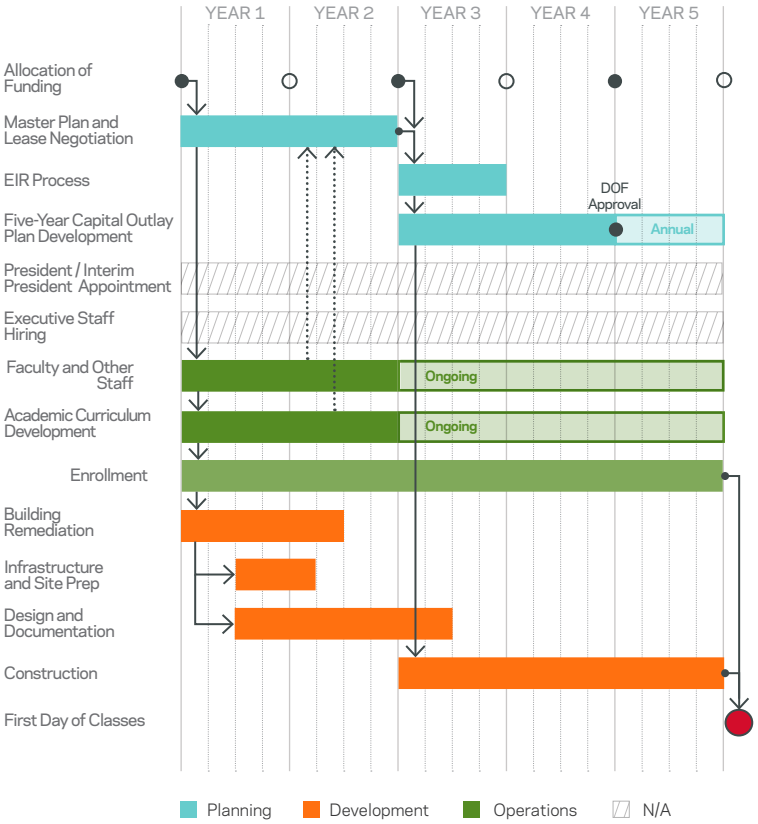
CSUSB PALM DESERT CAMPUS

The CSUSB Palm Desert Campus site already includes key facilities. The schedule for opening a Branch or Traditional Campus in Palm Desert will be driven primarily by allocation of funds and operational resources by the State Legislature and the construction of some additional facilities. This Report anticipates that the first day of classes as a Branch or Traditional Campus could take place within five years (see Figure 6.6).

Planning

Because the CSU Board of Trustees has already approved a Master Plan for the CSUSB Palm Desert Campus, the planning schedule for this site is likely to be highly truncated. This Report assumes modest updates to previously developed feasibility and EIR documentation. The CSU already owns the CSUSB Palm Desert Campus land. With the allocation of startup funds, the CSU could initiate the Five-Year Capital Overlay Plan and operational activities.

Figure 6.7 Stockton University Park - Branch Campus



Operations

This Report anticipates a similarly truncated process to initiate operations. To expedite the development of the academic curriculum, the California State University, San Bernardino President and executive leadership could lead any modifications to existing programs and previous master plan developed until, in the case of a Traditional Campus, a new President and executive staff are established. Additional faculty recruitment could also start shortly after funding is allocated.

Development

The CSUSB Palm Desert Campus Master Plan completed in 2016 provides a phased plan for the campus to grow and expand to 8,000 FTES. The campus already has facilities which support the current Off-Campus Center, but additional facilities would be needed to support the campus as a Branch or Traditional Campus development scenario. As with all of the Evaluated Locations, additional funding would need to be allocated to facilitate continued growth beyond the first day of classes.

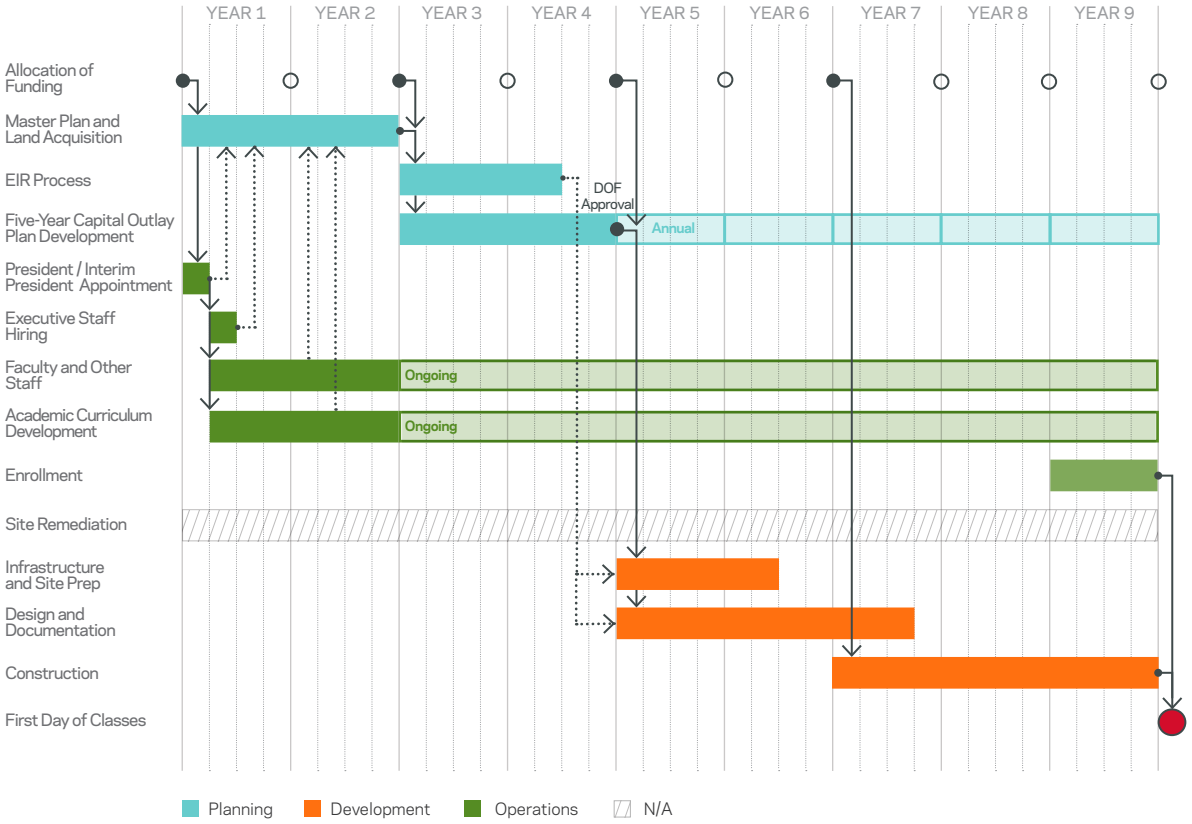
STOCKTON UNIVERSITY PARK

The Stanislaus State Stockton Campus is currently located within the Acacia Building at Stockton University Park. This Off-Campus Center includes some existing academic and operations facilities. The schedule for opening a Branch Campus at the Stockton University Park site will be driven primarily by allocation of funds by the State Legislature. This Report anticipates that the first day of classes as a Branch Campus could take place within five years of the allocation of funding (see Figure 6.7).

Planning

The planning schedule for an expansion of the current Stanislaus State Stockton Campus will be largely driven by allocation of funding by the State Legislature and negotiations with the existing master lessee of the Stockton University Park site. Although owned by the CSU, the University Park site is currently controlled by a private developer. More information regarding the current lease at this site is included within Section 5.5 of this Report. Master planning and environmental review would not be able to commence until the CSU and master lessee reach consensus about land that would be made available for campus development. Under the current Five-Year Capital Outlay Plan and in the lease agreements, there are provisions to build a new building, the Acacia Building Replacement Project, for use by the CSU. The Report assumes this new building project could move forward after initial funding is allocated. While lease negotiations may continue for other areas of the site, a more comprehensive physical master plan could be developed. For environmental review, it is likely that a Subsequent EIR would be required and include historic considerations, with an anticipated timeframe of 12 months. This could run concurrent with the Five-Year Capital Outlay Plan Development, which would include the physical master plan to further build out the Branch Campus.

Figure 6.8 San Joaquin County Fairground - Traditional Campus



Operations

This Report anticipates a similarly truncated process to implement modifications to existing academic curriculum and associated programs, as this could be conducted under the leadership at California State University, Stanislaus or the leadership of other proximate CSU campuses prior to faculty leadership being established. This would be followed by additional faculty and staff recruitment.

Development

The Stanislaus State Stockton Campus already includes facilities on site in the Acacia Building. Previous lease negotiations and planning have been completed to develop and construct the Acacia Building Replacement Project to support continued academic programs on the campus. This Report assumes that the design documentation and construction of that building could be initiated once funding is allocated. In addition to this first new building, it is anticipated that additional existing space could be secured through ongoing lease negotiations to achieve a first day of classes as an independent institution. As the initial phase of development is likely to include the continued use of the Acacia Building (and possibly other older structures existing on the site), this Report anticipates the need for building remediation as part of the project development, for which an estimated timeframe is provided.

This Report also considers three phases of land development for the Stockton University Park site (see Section 5.5). The first phase proposes the use of existing facilities to initiate the new Branch Campus and expedite to the first day of classes as noted above. These existing facilities may not be ideal for the academic curriculum developed, so the next scenario considers the construction of new facilities on the site in underutilized parcels or through demolition and re-construction. Then as further growth was needed, additional buildings and parcels across the site could be renovated or redeveloped to support the enrollment and academic curriculum. For both scenarios that implement reconstruction and development, the CSU would need to complete a Master Plan, project design documentation, infrastructure and site preparation, and building construction to deliver new, high-quality facilities. All of these phases would require negotiations between the CSU and the private developer.

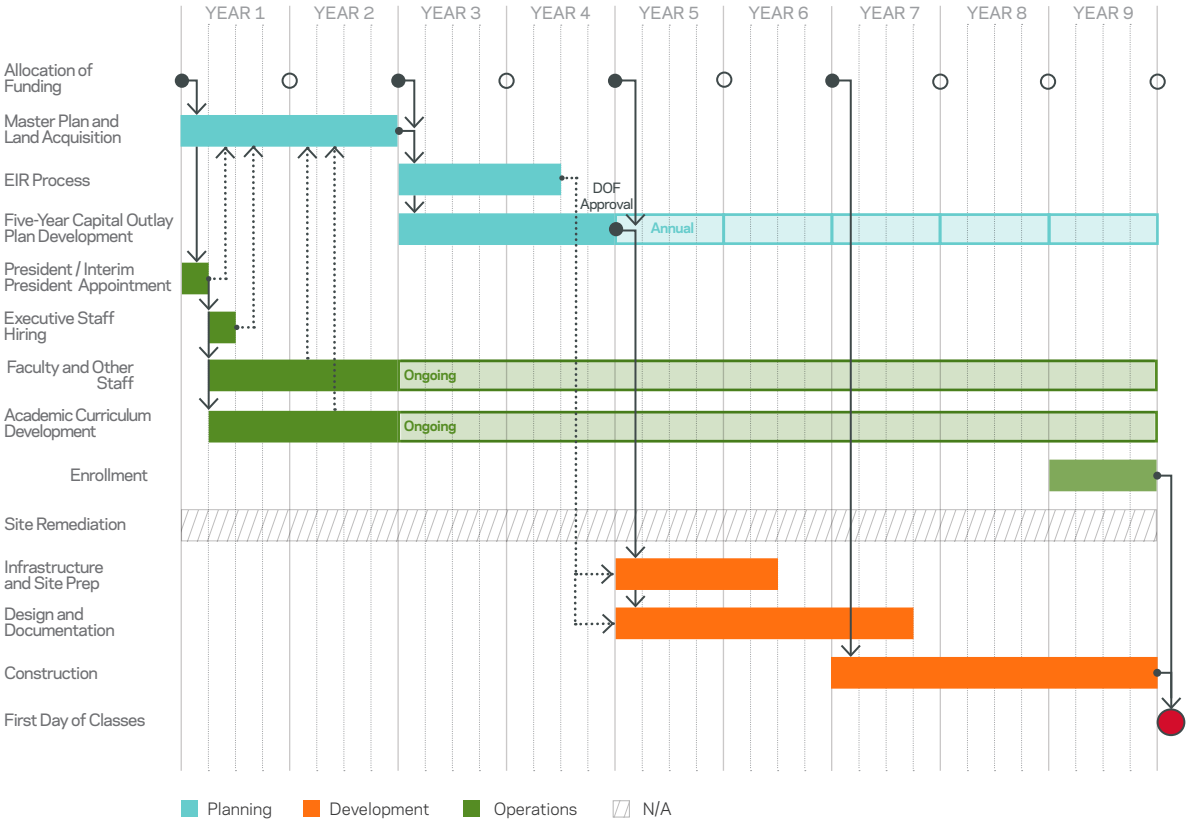
SAN JOAQUIN COUNTY FAIRGROUND

This Report assumes that a Traditional Campus at the San Joaquin County Fairground site would require nine years for planning, development, and operational ramp-up to first day of classes (see Figure 6.8).

Planning

This Report anticipates this site to have a planning schedule similar to other sites without existing facilities or infrastructure. Planning for the San Joaquin County Fairground site is anticipated to require master plan development and a land transfer from San Joaquin County, and it will need to undergo a Project Level EIR process.

Figure 6.9 Stockton Education and Enterprise Zone - Traditional Campus



Operations

This Report assumes that the CSU would appoint a President and recruit executive staff to direct the physical and academic master plan development process, followed closely by faculty recruitment. If needed, these processes could be conducted under the leadership at California State University, Stanislaus or by the leadership of other proximate CSU campuses prior to independent leadership being established.

Development

This Report assumes that infrastructure and site preparation could commence immediately after the Project Level EIR and Five-Year Capital Overlay Plan are approved. Although the San Joaquin County Fairground does have some infrastructure and existing buildings, this Report assumes this configuration is not suitable for campus development and would require significant modification. It is unknown if there would be any soil remediation required at this site.

STOCKTON EDUCATION AND ENTERPRISE ZONE

This Report assumes that a Stockton Education and Enterprise Zone site would require, at a minimum, nine years for planning, development, and operational ramp-up to the first day of classes (see Figure 6.9).

Planning

The Stockton Education and Enterprise Zone site is located just outside the City of Stockton and is currently a greenfield site. The land is owned by a private developer who has indicated that they would be willing to transfer the land to the CSU free of charge. The site is located outside of the City of Stockton and within San Joaquin County.

Operations

This Report assumes that the CSU would appoint a President and recruit executive staff to direct the physical and academic master plan development process, followed closely by faculty recruitment. If needed, these processes could be conducted under the leadership of California State University, Stanislaus or by the leadership of other proximate CSU campuses prior to independent leadership being established.

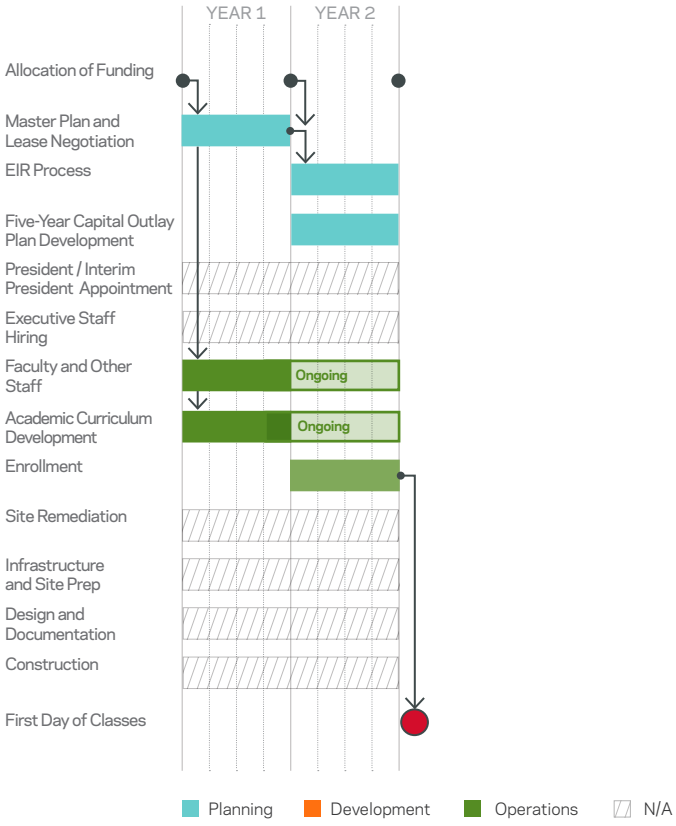
Development

This Report assumes that infrastructure and site preparation could commence immediately after supplemental environmental review, simultaneous with design documentation, and with building design and construction to follow.

SAN MATEO COUNTY CCD - CAÑADA COLLEGE

This Report anticipates that a University Center co-located at Cañada College in San Mateo County would require no capital investment and limited recruitment of staff, due to a University Center's association with an existing CSU campus. This Report anticipates that the first day of classes could take place within two years, depending on allocation from the State and subsequent

Figure 6.10 San Mateo County CCD – Cañada College - University Center



allocation of resources by the main CSU campus supporting it (see Figure 6.10).

Planning

This Report anticipates that a University Center would offer a limited academic program tailored to the region, and thus it would require minimal additional feasibility and/or master plan analysis and similarly limited funding allocation. These activities and lease negotiations with the San Mateo County Community College District to occupy space are likely to result in a highly truncated planning schedule.

Operations

The University Center model anticipates association with an existing proximate CSU campus, and as such does not require its own President, executive staff, or faculty leadership. This Report anticipates rapid development of an academic curriculum and additional faculty and staff recruitment. Enrollment for this location is anticipated to take advantage of the co-location with the community college and be focused on transfer students.

Development

The University Center model will utilize leased space. This Report assumes there is no renovation needed, as Cañada College is already delivering higher education at its facilities. Therefore, no development would be required in order to arrive at the first day of classes within two years.

6.5 Other Implications of the Analysis

6.5.1 ECONOMIC IMPACTS

In order to estimate the economic impacts of an illustrative new California State University campus at different scales of student enrollment, this Report draws on a 2010 economic impacts study of the CSU system completed by ICF International,[1] translated into per-Full-Time Equivalent Student (FTES) values and adjusted to 2020 dollar values.

The ICF Report used three measures of the economic impacts of the CSU system in California: total economic impacts from direct spending by CSU campuses, the "multiplier effect" as that spending is re-spent by suppliers and employees in the economy, and total economic impacts from increased alumni earning potential. The ICF Report found that CSU campuses contributed $7.96 billion ($9.73 billion in 2020$) to the California economy through operational spending, wages paid to employees, construction and capital expenditures, and student spending. This direct spending in the California economy resulted in a total economic impact of $17.0 billion ($20.7 billion in 2020$). Beyond evaluating direct spending, the ICF Report quantified the long-term impact that the CSU system has on increasing the earning potential of historically underrepresented populations by analyzing the economic impact of the increased expected wages of CSU graduates. The ICF Report found that the increase to expected yearly earnings and the subsequent increase in household spending for all CSU alumni, dubbed the "alumni effect," created an economic impact of roughly $70.4 billion ($86.1 billion in 2020$) on the California economy in one year. The ICF Report's analysis indicates that the CSU system produces a return of $5.43 for every dollar it receives from the State of California when only considering direct spending by the CSU system; however, when considering the alumni effect, the CSU system yields a $23 return for every dollar invested by the State of California.

This Report translates the economic impacts estimated by ICF International for the entire CSU system into per-FTES impacts and then extrapolates to 1,500, 7,500, and 15,000 FTES to illustrate the economic impacts of each of the evaluated campus models. This Report considers only economic impacts associated with university operation, and not those associated with the "alumni effect." This Report adjusts all impacts to 2020 values using the Consumer Price Impact, as shown in Table 6.11, which are reflective of the year that a campus would reach each FTES target.

The economic impacts of a potential new campus at each of the Five Evaluated Locations are likely to differ by scale of assumed student enrollment and by Cluster. Economic markets differ in composition and size across the five evaluated locations, and differences in the composition of regional economies result in differences in total economic impacts associated with every dollar spent by CSU campuses. As such, the expected economic impacts of a CSU campus are likely to vary from the estimates demonstrated in Table 6.11. Furthermore, because the ICF Report was prepared in 2010, albeit with dollar values inflated to 2020 values in this Report, economic conditions in the State of California have changed since 2010, and so it is likely that the economic impacts of a CSU campus at the three illustrative enrollment levels are likely to vary somewhat from the above estimates. For example, two recent economic impact reports commissioned by CSU Channel Islands and Cal State Long Beach in 2018 show impacts that are 11 to 13 percent higher than would be expected when adjusting for inflation. It should also be noted that the above estimates do not include the economic impacts associated with construction of a new campus. The direct cost of construction is, however, discussed in Section 6.1 of this Report.

Table 6.11 Total Estimated Economic Impact and Employment from the Economic Activity of a New CSU Campus

Campus Size	Total Economic Impact - 2020$	Total Jobs
1,500 FTES	$81,100,000	580
7,500 FTES	$405,400,000	2,900
15,000 FTES	$810,800,000	5,810

Source: HR&A's analysis of ICF International's Report, *Working for California: The Impact of the California State University System* (2010).

6.5.2 LOCAL DEVELOPMENT IMPLICATIONS

A new CSU campus at any one of the Five Evaluated Locations would create economic impacts in the form of new jobs, wages, and other measures of economic activity due to construction and direct annual institutional spending in the surrounding region. These direct impacts also have a measurable general "multiplier effect" in the local economy. Other indirect economic impacts that universities sometimes provide to their surrounding regions are not as easily measurable. For example, some universities provide transformational support for local economic development because businesses choose to locate near them to benefit from on-campus research and development of new technologies and the presence of faculty and student talent associated with that research.

Although all universities produce some degree of knowledge transfer, the scale of business attraction and co-location occurs selectively and depends on the ability of the university to sustain a high level of technical research investment over time. Often, only the largest universities can attract or commit the sustained levels of research funding to support both commercially viable knowledge transfer and the required pool of skilled graduates.[2]

The Carnegie Classification of Universities, which assigns higher education campuses across the nation to specific categories according to research investment and doctoral programs, recognized San Diego State as the only university in the CSU system with "high" research activity. This benchmark, which requires at least $5.0 million in research expenditures and 20 research/scholarship doctoral degrees, is not well aligned with

1. ICF International. (2010). *Working for California: The Impact of the California State University System*. Prepared for the CSU Office of the Chancellor.
2. Jay Schalin. (2010). *State Investment in Universities: Rethinking the Impact on Economic Growth*. John William Pope Center for Higher Education Policy (NJ1).

the CSU's mission as stated in the California Master Plan for Higher Education. As such, while a new CSU at one of the Five Evaluated Locations would spur new economic activity in the local economy, a new campus is unlikely to form major industry-university partnerships that would transform the character of a local economy, beyond supporting diversification associated with faculty and staff employment and supporting workforce needs and potentially incremental growth of existing industries.

However, non-research universities in smaller metropolitan areas can still make important marginal impacts on their local economy without developing the industry-university partnerships more characteristic of locations with major research universities. Generally, smaller regions such as Stockton and Palm Desert have less diverse economies that can be expanded and enhanced by the presence of a university and its workforce, such as a new CSU. Research suggests that a new university in small and medium-sized metropolitan statistical areas (i.e., those containing fewer than 200,000 nonfarm jobs) can lead to larger positive impacts to average regional earnings when compared to a new university in large metropolitan statistical areas.[3] As such, the scale and extent of the economic impact of a new university is predicated on a number of factors, but the largest marginal gains stand to be made in regions where the local economy is smaller and less diverse. However, the CSU's focus on instruction rather than research is unlikely to increase the competitiveness of Stockton or Palm Desert in terms of ability to attract new industries or major businesses.

6.5.3 INSTITUTIONAL IMPACTS

CONTEXT

Prior to 1946, fewer than 10 percent of 18- to 24-year-olds attended college. The U.S. was still primarily manufacturing based, and human physical capital was considered more valuable than intellectual capital. With the passage of the GI Bill (aka the Servicemen's Readjustment Act) in 1944, both the perception and realities of higher education were transformed, and access to higher education increasingly became considered a right. Although veterans led the way, this also opened doors for others to attend college. As the economy similarly evolved, demand for those with college degrees outpaced the rate at which degree-granting institutions could produce them. The Higher Education Act of 1965 (and subsequent policy changes through 1990) resulted in rapid growth of the number of public and private institutions. This rapid growth of options within the marketplace and the subsequent competition for students shifted public thinking, and higher education became a perceived commodity.[4]

Today, the higher education "marketplace" has completely transformed. As of 2016, approximately 43 percent of 18- to 24-year-olds attend college, with nearly 70 percent of high school graduates attending some level of higher education institution. The number of degree-providing institutions (including public and private) has grown from 1,851 in 1950 to, at its peak in 2012, 4,726.[5] These institutions include public and private (nonprofit and for-profit) institutions, with the largest percentage growth taking place in the category of private for-profit institutions. The distribution of these institutions by type and quality is uneven, with some areas benefiting from abundant choices and others considered to be higher education "deserts." In areas with limited public options, for-profit institutions have often filled those gaps, targeting those with guaranteed sources of funding for tuition (including veterans) or those for whom a credential or degree is strictly required for career advancement (teachers requiring additional credentials). Those who graduate from a for-profit college generally may have more opportunities in the labor market than they otherwise would with only a high school education, however, the credentials and degrees they offer tend to be 30 to 40 percent more expensive than the same credentials and degrees from a nonprofit public institution.[6]

In very recent years (2015–2019), there has been a reduction/consolidation of higher education institutions nationwide. That has been partially driven by reduced overall enrollment demand

Table 6.12 Bachelor's Degree Offerings by California Community Colleges

Cluster	CCC Campus	Degree Offering
1. North California	Shasta	Health Information Management
2. Chico	Feather River	Equine and Ranch Management
3. Sacramento		
4. Bay Area	Foothill	Dental Hygiene
	Skyline	Respiratory Care
5. Upper Central Valley	Modesto	Respiratory Care
	Solano	Biomanufacturing
6. Central Valley	Antelope Valley	Airframe Manufacturing Technology
	Bakersfield	Industrial Automation
7. Central Coast		
8. Los Angeles	Cypress	Mortuary Science
	Rio Hondo	Automotive Technology
	Santa Ana	Occupational Studies
	Santa Monica	Interaction Design
	West Los Angeles	Dental Hygiene
9. Inland Empire		
10. San Diego	MiraCosta	Biomanufacturing
	San Diego Mesa	Health Information Management

Source: *California Community Colleges. (2020). Baccalaureate Degree Pilot Program.* https://www.cccco.edu/About-Us/Chancellors-Office/Divisions/Educational-Services-and-Support/What-we-do/Curriculum-and-Instruction-Unit/Curriculum/Baccalaureate-Degree-Pilot-Program

3. Harvey Goldstein and Joshua Drucker. (2006). The Economic Development Impacts of Universities on Regions: Do Size and Distance Matter? *Economic Development Quarterly, 20*, 22-43.
4. National Center for Education Statistics. (2018). *Digest of Education Statistics*. https://nces.ed.gov/programs/digest/d18/tables/dt18_302.10.asp
5. National Center for Education Statistics. (2019). *Digest of Education Statistics*. https://nces.ed.gov/programs/digest/d18/tables/dt18_317.10.asp
6. Stephanie Riegg Cellini and Nicholas Turner. (2016). *Gainfully Employed? Assessing the Employment and Earnings of For-Profit College Students Using Administrative Data.* https://predatorystudentlending.org/wp-content/uploads/2018/03/2016_-_NBER_-_worse_off.pdf

Table 6.13 Institutions within Clusters Containing the Five Evaluated Locations

Cluster	UC Campus	CSU Campus	CCC Campuses within Counties with Evaluated Locations		Five Evaluated Locations
4. Bay Area	Berkeley San Francisco Santa Cruz	East Bay Maritime San Francisco San José Sonoma	**San Mateo County** Cañada College College of San Mateo Skyline College	**Contra Costa County** Los Medanos College Diablo Valley College Contra Costa College	City of Concord San Mateo County
5. Upper Central Valley	Merced	Stanislaus	**San Joaquin County** San Joaquin Delta College		San Joaquin County (Stockton)
9. Inland Empire	Riverside	San Bernardino	**Riverside County** College of the Desert Mt. San Jacinto Community College District Palo Verde College	 Riverside City College Moreno Valley College Norco College	City of Palm Desert
10. San Diego	San Diego	San Diego San Marcos	**San Diego County** Cuyamaca College Grossmont College MiraCosta College Palomar College	 San Diego City College San Diego Mesa College San Diego Miramar College Southwestern College	City of Chula Vista

Source: California Community Colleges. (2020). Community Colleges Districts.

since 2010 and federal legislation related to for-profit institutions, but it is also motivated by consumer (student) selection. Student selection is increasingly price sensitive and in search of a direct relationship between degree conferral and vocational opportunities, qualities that are generally not selling points of small liberal arts colleges with higher costs to attend.[7] As costs to educate students increase over time, small, private liberal arts colleges are struggling to attract students.

Given funding pressures across all three California Institutions of Higher Education (the California Community Colleges, the California State University, and the University of California), there is a perception that institutions may cannibalize enrollment demand for future students. Although each institution is intended to serve varying sectors of the student population, recent state policy shifts and aggressive marketing efforts by some institutions have further fueled concern that the presence of one institution in proximity to another (regardless of type) might negatively impact potential enrollment. Of particular note is a 2014 policy to allow California Community Colleges to trial bachelor's degree programs, as shown in Table 6.13.[8] Although highly specialized at this point, there is some concern that expansion of these programs, while potentially benefitting the local students, could drain resources from other institutions that have historically invested in similar programs in those regions. At this point, there is not a direct correlation between institutional proximity (of a different type) and an individual institution's ability to attract students.

While there is not a clear indication that institutional proximity between public universities creates competition resulting in negative impacts to enrollment demand, the concern is pervasive. Potentially more impactful and of greater concern is the relationship between perceived relevance of degree offerings and enrollment demand. If the CSU system is unable to address unmet demand due to funding or other constraints, there is potential that other systems with entrepreneurial leaders will move to fill the gap. Nevertheless, it is expected that a new, traditional CSU campus in one of the Five Evaluated Locations could have both positive and modestly negative fiscal impacts on other institutions. These institutions are listed in Table 6.13.

IMPACT ON OTHER CSU CAMPUSES

CSU campuses within Clusters containing the Five Evaluated Locations have generally seen FTES enrollment increase from 2007 through 2018, as shown in Figure 6.11. There was a slight decrease in enrollment around the time of the Great Recession due to budgetary constraints placed on all universities within the system. After a period of growth, modest declines in the Bay Area Cluster are due to a range of other causes, including reduced community college enrollment trends, stagnant population growth, and institutions' inability to attract students from outside the Cluster—largely attributable to the high cost of housing.

Across the system, existing CSU campuses with established programs that have a direct workforce/vocational pathway are well positioned to continue to grow and are unlikely to be impacted by the creation of a new campus in terms of enrollment demand.

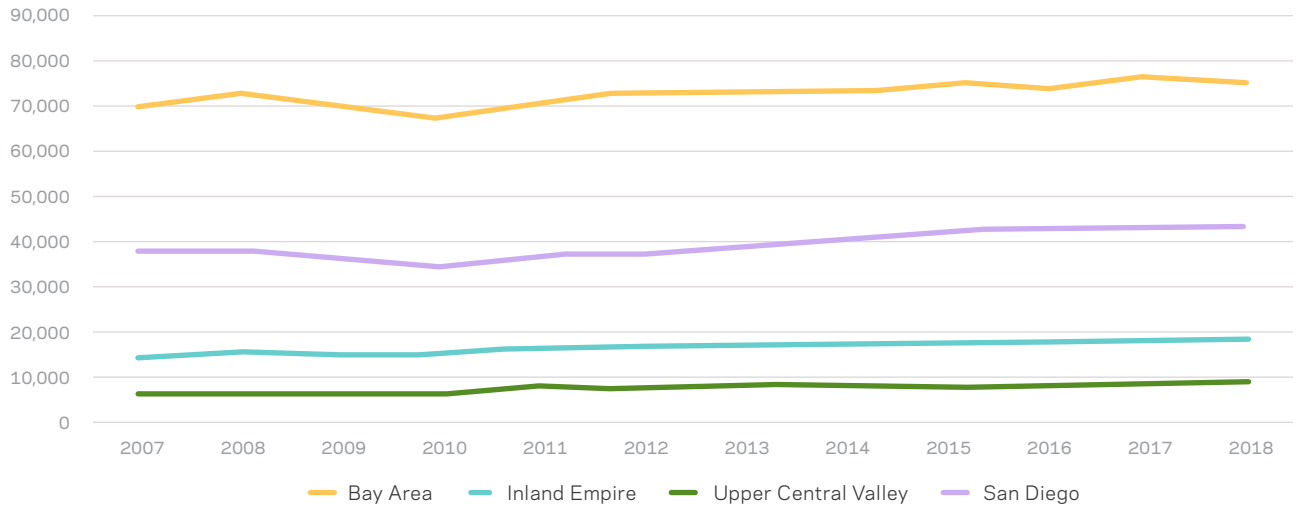
7. S&P Global Ratings. (2019). *Consolidation or Closure: The Future of U.S. Higher Education?* https://www.oacubo.org/wp-content/uploads/2019/04/2019.04.25-Morning-Breakout-Late-1-S-and-P-Handout-1.pdf
8. California Community Colleges Chancellor's Office. (2020). *Baccalaureate Degree Pilot Program*. https://www.cccco.edu/About-Us/Chancellors-Office/Divisions/Educational-Services-and-Support/What-we-do/Curriculum-and-Instruction-Unit/Curriculum/Baccalaureate-Degree-Pilot-Program

The campuses that pair academic program relevance (a direct vocational tie) with residential and student life continue to show robust application rates and are attracting students from across the state. CSUs that have a history of serving as "commuter" schools, particularly those with a liberal arts focus, will continue to see modest or negative growth and are most likely to be negatively impacted by a new campus. These campuses are similarly competing with community colleges, and as community colleges begin to deliver on the California College Promise with enhanced career pathways, competition is likely to increase.

IMPACT ON COMMUNITY COLLEGES

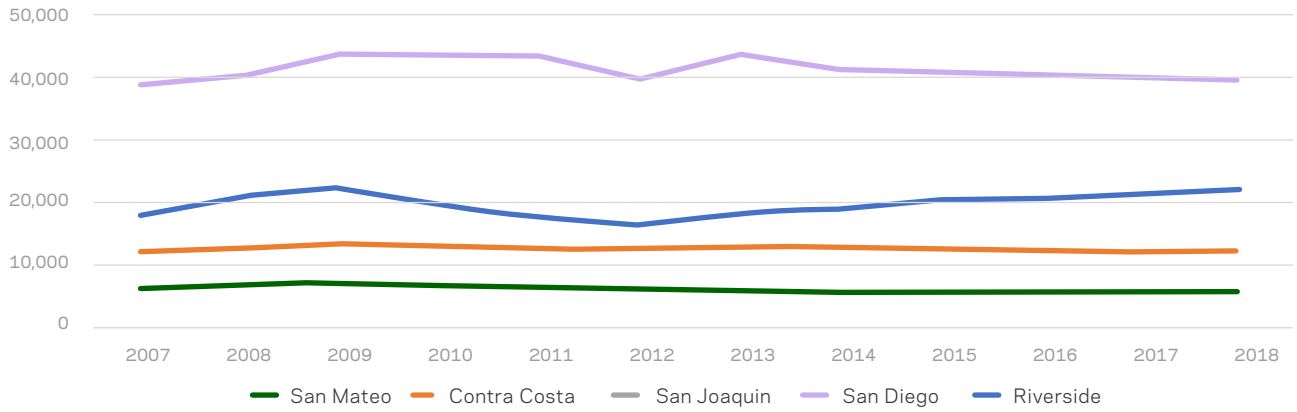
Community college enrollment demand within the four Studied Clusters has generally remained the same or declined modestly across Clusters from 2007 through 2018, as shown in the trends depicted in Figure 6.12, which are reflective of students taking 12+ units for community colleges across each Cluster. As demonstrated by historical enrollment trends and as shown in part in Figure 6.12, community colleges see the greatest negative impact to enrollment demand when the economy is growing and the greatest positive impact to enrollment demand when the economy weakens (e.g., between 2008 and 2009 in Figure 6.12) and additional qualifications are required to secure jobs. However, a proximate, workforce-responsive CSU is likely to have a beneficial impact on nearby community colleges, as there is a perceived direct pipeline to a bachelor's degree. Because community college transfers enter the CSU as students in upper-division courses, which are higher cost per FTES, impaction has reduced transfer rates to more costly (and impacted) programs, which has limited the volume of transfer students and subsequently negatively impacted the nearby community colleges. Research from Columbia University and others indicates that roughly three-quarters of community college transfers enroll at a public university. Allowing increased access through increased upper-division enrollment at the CSU would likely lead to increasing transfer rates: While 80 percent of students entering community colleges indicate that they want to earn a bachelor's degree, only approximately 30 percent do

Figure 6.11 CSU Fall FTES Enrollment in Studied Clusters



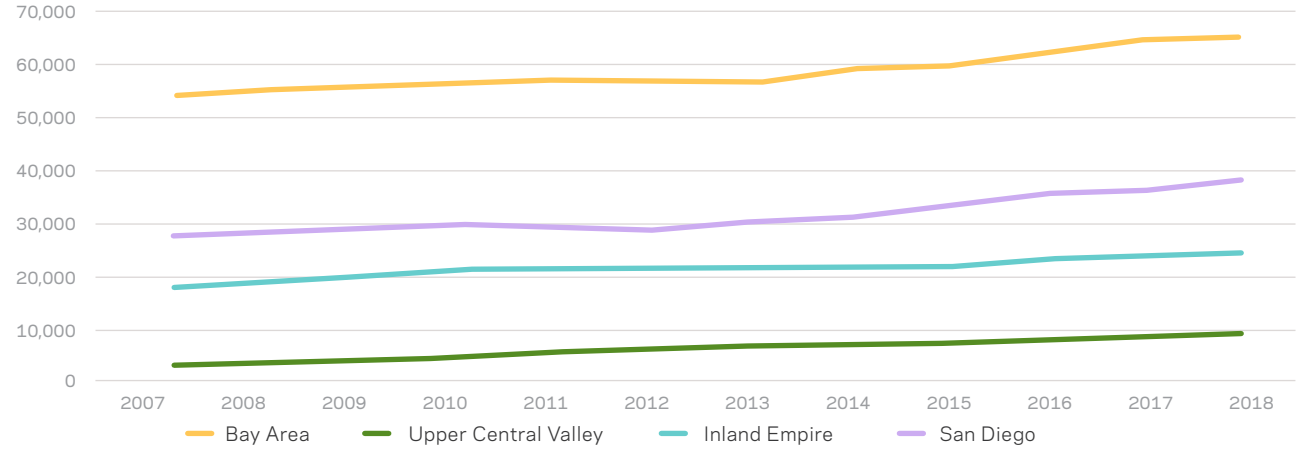
Source: The California State University Enrollment Dashboard.

Figure 6.12 Community College Fall Enrollment for Students with 12+ Units for Counties Containing an Evaluated Location



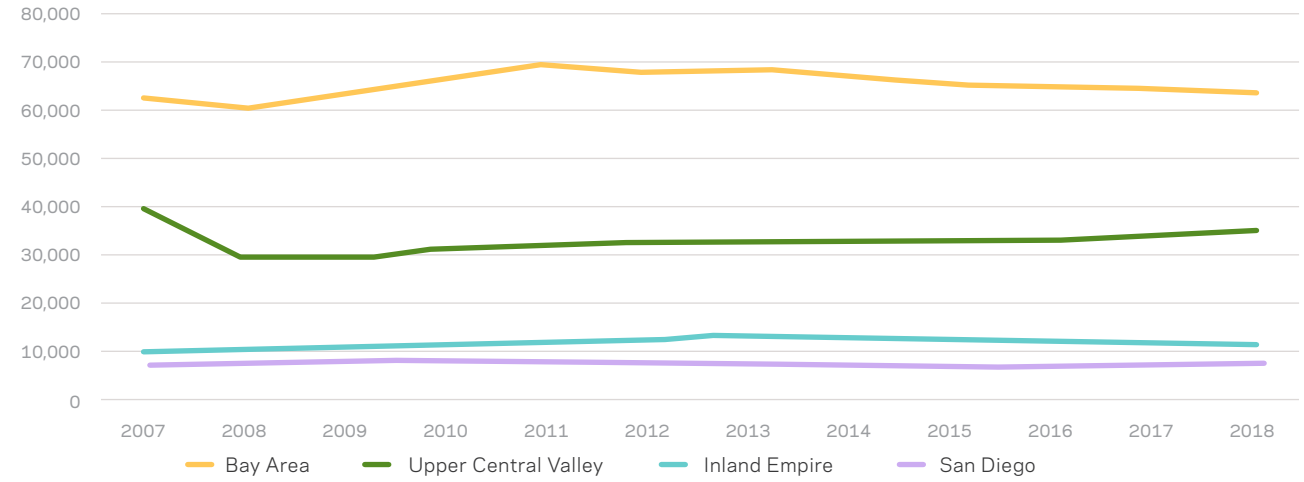
Source: The California Community Colleges Chancellor's Management Information Systems Data Mart.

Figure 6.13 University of California Fall Enrollment in Studied Clusters



Sources: National Center for Education Statistics. (2018). Digest of Education Statistics.

Figure 6.14 Private Institutions Fall Enrollment in Studied Clusters



Sources: National Center for Education Statistics. (2018). Digest of Education Statistics.

so after 6 years.[9] Further investment in existing CSU campuses or new CSU campuses is likely to have a generally positive effect on nearby California Community Colleges.

IMPACT ON UNIVERSITY OF CALIFORNIA CAMPUSES

The University of California system campuses that are within the Studied Clusters containing the Five Evaluated Locations have seen consistently strong increases in total enrollment from 2007 through 2018, as shown in Figure 6.13. Growth in the UC system is likely to continue as state support will allow, and as the system attracts students nationally and globally in addition to its strong draw statewide. In many cases, UC campuses provide both general, liberal arts academic programs and vocationally specific programs, allowing them to compete in multiple marketplaces at once. UC campuses are a primary competitor with private institutions rather than with the CSU, as defined in the California Master Plan for Education which reserves large-scale academic research and conferral of doctoral degrees for the UC. UC campuses are unlikely to be affected by a new CSU campus, although the Common Application has increased competition between the UC and the CSU for students. Furthermore, with larger endowments and possibilities for better financial aid packages, the UC is in some cases a lower cost option than CSU campuses for families earning less than $110,000 annually, furthering the unlikeliness that UC campuses would be impacted by a new CSU campus.[10]

IMPACT ON PRIVATE (NONPROFIT) INSTITUTIONS

Overall, total enrollment for private, nonprofit higher education institutions has decreased modestly since 2007, with a notable decline in the Bay Area, as shown in Figure 6.14. Local and even statewide private institutions are the most likely to be negatively impacted by the development of a new campus, as they are generally two to three times more expensive to attend than a UC or CSU and are typically liberal arts-focused institutions, with less emphasis on workforce pathways. Private institutions are likely to also see negative enrollment impacts associated with CSU campuses increasing on-campus residential or student life amenities that make campuses more appealing, along with any removal or lightening of impaction.

9. NSC Research Center. (2019). *Tracking Transfer*. https://www.ppic.org/publication/higher-education-in-california-student-costs/
10. Public Policy Institute of California. (2014). *Higher Education in California: Student Costs*. https://www.ppic.org/publication/higher-education-in-california-student-costs/

6.6 Implementation at Evaluated Locations Conclusions

CAPITAL COSTS, FUNDING SOURCES, AND AVAILABILITY

As all seven of the identified sites have land suitable for construction of educational facilities at either heavily discounted or no cost, capital costs for the various development scenarios were defined primarily by scale of construction required. Accordingly, a University Center at either the San Mateo County CCD – Cañada College or Concord Reuse Project Campus District sites is the least costly development option, followed by the 7,500 FTES Branch Campus. The costs of state funding necessary for capital construction expressed in Present Value (PV) terms (inclusive of capital costs for Academic Program facilities and debt service over many years) for a Branch Campus development scenario are between $1.8B (CSUSB Palm Desert Campus) and $2.5B (Concord Reuse Project Campus District). Costs vary widely due to site costs and the high cost of materials and labor in Northern California. In total, the overall capital cost of campus buildouts for a 7,500 FTES Branch Campus is likely to be much higher when the additional cost of Self Support facilities is included (housing, parking, and other student-funded facilities), although costs for this category of facilities are typically not funded from state allocations.

The capital costs and debt service associated with a 7,500 FTES Traditional Campus development scenario also vary widely. The CSUSB Palm Desert Campus site is one of the least costly ($2.2B PV), as existing facilities offset the capital cost of a new campus, and its location in Southern California means the cost of materials and labor is lower than in other regions. Other sites evaluated with this development scenario range from $2.1B PV (Chula Vista University and Innovation District and San Joaquin County Fairground) to $2.5B (Stockton Education and Enterprise Zone). The difference in costs is due to the high sitework and on- and off-site utility infrastructure costs anticipated at the Stockton Education and Enterprise Zone site. As noted previously, the overall capital costs of campus buildouts may be higher over time,

Table 6.14 Summary of Implementation Costs and Timeline for Identified Sites

Identified Site	Development Scenario	Estimated Project Capital Cost	Present Value of Total Academic Program Capital Costs	Annual Debt	Annual Operating Fund Costs	Annual Operating Fund Costs per FTES	Annual State Contribution to Operating Fund Costs	Minimum Years to Implement
Chula Vista University and Innovation District	Traditional (7,500 FTES)	$2.3 Billion	$2.1 Billion	$130 Million	$127.5 Million	$17,000	$90 Million	9
	Branch (7,500 FTES)	$2.1 Billion	$1.8 Billion	$109 Million	$116.5 Million	$15,500	$80.5 Million	9
Concord Reuse Project Campus District	Branch (7,500 FTES)	$2.6 Billion	$2.5 Billion	$149 Million	$116.5 Million	$15,500	$80.5 Million	9
	University Center (500 FTES)	$0	$0	$0	$7.5 Million	$14,500	$5.0 Million	5*
CSUSB Palm Desert	Traditional (7,500 FTES)	$2.2 Billion	$2.2 Billion	$117 Million	$127.5 Million	$17,000	$90 Million	5
	Branch (7,500 FTES)	$1.9 Billion	$1.8 Billion	$98 Million	$116.5 Million	$15,500	$80.5 Million	5
Stockton University Park	Branch (7,500 FTES)	$2.4 Billion	$2.6 Billion	$139 Million	$116.5 Million	$15,500	$80.5 Million	5
Stockton Education and Enterprise Zone	Traditional (7,500 FTES)	$2.6 Billion	$2.5 Billion	$152 Million	$127.5 Million	$17,000	$90 Million	9
San Joaquin County Fairground	Traditional (7,500 FTES)	$2.4 Billion	$2.2 Billion	$134 Million	$127.5 Million	$17,000	$90 Million	9
San Mateo - CCD Cañada College	University Center (500 FTES)	$0	$0	$0	$7.5 Million	$14,500	$5.0 Million	2

** Requires facilities to be constructed by others*

Sources: MGAC estimates based on Consultant Team campus model specifications; HR&A Advisors, Inc. analysis of MGAC estimates based on Consultant Team campus model specifications; California State University Campuses Actual Expenses (2016–2018), HR&A Advisors, Inc.

although a portion may be funded by student fees associated with housing, parking, and other student-funded facilities.

OPERATING COSTS ANALYSIS

Smaller and newer campuses are generally more expensive to operate on a per-FTES basis than larger and older ones. A University Center (at Concord Reuse Project Campus District and San Mateo County CCD – Cañada College) could require as little as $5.0 million in annual Operating Fund costs, or $14,500 per FTES, approximately 5 percent more expensive than growing FTES at a larger campus, assuming the University Center is linked with a larger campus (at least 15,000 FTES). Operating Fund costs for a Branch Campus (at Chula Vista University and Innovation District, Concord Reuse Project Campus District, CSUSB Palm Desert Campus, and Stockton University Park) are higher, requiring $116.5 million annually, or $15,500 per FTES. A 7,500 Traditional Campus (at Chula Vista University and Innovation District, CSUSB Palm Desert Campus, San Joaquin County Fairground, and Stockton Education and Enterprise Zone) will require $127.5 million in annual Operating Fund costs, or $17,000, which is slightly higher than the Branch Campus model because it does not share student services and institutional support costs with another campus.

SCHEDULE OF IMPLEMENTATION

Implementation timelines, leading up to the first day of classes as a new campus or transitioning from an Off-Campus Center to a different campus development scenario, are impacted most significantly by the evaluated campus development scenario and whether there are existing CSU facilities located at the site. A University Center at Cañada College has the fastest implementation schedule (this Report estimates within two years), as this development scenario relies on the CSU occupying existing facilities and the leadership and academic curriculum development being led by an existing CSU campus. CSUSB Palm Desert Campus and Stockton University Park are both existing Off-Campus Centers, and the transition to a Branch Campus is anticipated to take five years of funding allocation, as many of the planning processes have already been completed and there are existing facilities on the site. The CSUSB Palm Desert Campus is also the only identified site that has completed the CSU Campus Master Plan update process, with a planned capacity of 8,000 FTES. The remainder of the identified sites are anticipated to require planning, operational, and development (including construction) activities that will take at least nine years. At all locations, continued capital investment is needed beyond the first day of classes for continued growth to a Branch Campus at 7,500 FTES or a Traditional Campus at 7,500 FTES or 15,000 FTES.

OTHER IMPLICATIONS OF THE ANALYSIS

Generally, independent studies estimate that the CSU generates a return on state investment exceeding five times every dollar of state support. Based on precedents, a new CSU is likely to generate an annual, ongoing economic impact exceeding $80 million for a 1,500 FTES University Center to as much as $400 million for a 7,500 FTES Branch Campus or Traditional Campus. This could create a significant marginal impact on a smaller local economy such as that of San Joaquin County (Stockton) or the Coachella Valley (Palm Desert). But a new CSU campus is unlikely to have the kind of transformative local economic impact more typical of a major research university or institution that attracts co-located new industry pursuing commercialization of research and access to doctoral students and senior faculty. A new CSU would also have beneficial impacts on other institutions, particularly California Community Colleges, which may attract additional students, driven in part by expanded opportunities to transfer to a proximate CSU; CSU and UC campuses offering workforce-aligned degree programs are unlikely to see negative impacts. However, private institutions, which are generally more expensive, may see negative impacts, as a new CSU campus may attract students who might otherwise attend local private institutions to instead choose to attend a proximate and more affordable CSU campus.

OVERALL CONCLUSIONS REGARDING IMPLEMENTATION AT THE EVALUATED LOCATIONS

Projected 2035 enrollment demand does not exceed Planned Capacity at the existing 23 CSU campuses. However, substantial additional financial resources would be required to accommodate enrollment demand at these campuses. To meet different policy priorities, funding to accommodate future enrollment growth could be reallocated instead to a new campus model of the kind analyzed in this Report at one of the Five Evaluated Locations or another location. In this case, the capital and operational funding allocations from the state would have to be substantial to prevent negative budgetary impacts to existing CSU campuses. As shown in Table 6.14, the capital cost of new facilities for a 7,500 FTES Traditional or Branch Campus could range from $1.9 billion to as much as $2.6 billion. Debt service for state-funded infrastructure and facilities for 7,500 FTES campuses (excluding facilities that are typically funded by student fees) could range from $98.0 to $152.0 million annually; operational costs could range from $80.5 million to $90.0 million annually for those campus models. Although debt service for the construction of a single 7,500 FTES campus would not exceed the CSU's statutory debt limit, in total, a new campus could require additional state funding for the CSU system exceeding $200 million annually. Although a new University Center could be provided in a shared facility at a lower cost and under a faster implementation timeline (as little as two years), more robust campus models would require at least five to nine years to implement, pending authorization and funding by the Legislature. Achieving these timelines to the first day of classes and subsequent growth to 7,500 FTES, without impacting the operational sustainability of existing CSU campuses, would require consistent and significant annual state funding allocations.

Glossary

Academic Program: A collection or series of courses and/or requirements that lead to a degree, certificate, or transfer to another institution of higher education.

A-G High School Course Requirements: A 15-unit series of courses for which prospective students must earn a C or better in order to be admitted to the California State University.

Branch Campus: A campus that is organizationally linked with a larger, main campus but geographically separate and defined by the following four criteria: 1) It is permanent in nature and located on state-owned land; 2) It offers a complete curriculum resulting in a degree, certificate, or other recognized educational credential; 3) It has its own faculty and an administrative or supervisory leadership entity; and 4) It has its own budgetary hiring authority.

Budget Act of 2019: The California Legislature Act that made appropriations for the support of state government for the 2019–2020 fiscal year. The Budget Act of 2019 (as amended), Chapter 363 of the Statutes of 2019 (Senate Bill 109), Section 75, Item 6610-001-0001, Provision Articles 1.5 (.c) and (1.5.d) are the sections that apply to the CSU, enumerating appropriated funds to increase CSU enrollment and to provide a review of the Five Evaluated Locations.

California Energy Code: Commonly referred to as "Title 24" or "Title 24 Energy Code"—the State of California's energy conservation standard, designed to reduce wasteful and unnecessary energy consumption in newly constructed and existing buildings.

California Legislative Analyst's Office (LAO): An office overseen by the Joint Legislative Budget Committee that provides fiscal and policy advice to the State Legislature. It is known for its fiscal and programmatic expertise and nonpartisan analyses of the state budget.

Campus Development Scenarios: Traditional Campus, Branch Campus, Off-Campus Center, and University Center (see their respective definitions).

Capacity/Non-Capacity Spaces: Capacity spaces refer strictly to classrooms and teaching labs. Non-capacity spaces refer to other types of spaces where face-to-face instruction is offered but unaccounted for in utilization metrics.

Capital Cost: Fixed, one-time expenses incurred in the purchase of land, buildings, construction, and equipment used in the production of goods or in the rendering of services. In other words, the total cost needed to bring a project to an educationally or commercially operable status.

Capital Funding: Money sourced from the state, CSU resources, grants, and/or fundraising to support investments in the physical plant.

Climate Action Plan: A strategic framework for measuring, planning, and reducing greenhouse gas (GHG) emissions and related climate impacts.

Clusters: 10 geographic groupings of California counties and their respective California State University campuses, defined by characteristics that inform enrollment such as drive sheds, physical barriers, and labor market areas. The Clusters are: 1 North California, 2 Chico, 3 Sacramento, 4 Bay Area, 5 Upper Central Valley, 6 Central Valley, 7 Central Coast, 8 Los Angeles, 9 Inland Empire, 10 San Diego.

Cohort Survival Model: A model that forecasts the completion rate at each year of study until graduation.

Continuation Rate: The percentage of first-time freshmen in a given fall term who returned to the institution in a subsequent fall term.

COVID-19 Pandemic: The outbreak and worldwide spread of coronavirus, from late 2019 through, at the time of this Report, July 2020.

Current Capacity: The existing physical capacity of a given campus measured in terms of Full-Time Equivalent Students (FTES). It is estimated using combined metrics of actual seats (or stations) in a given classroom or teaching lab and legislated standards for hours of use and rate of occupancy. Capacity by individual space is summed to define the overall capacity of a given campus in total FTES. For the purposes of the Report, Fall 2018 data were used.

Current Enrollment: The sum of all registered students in courses at each campus measured in FTES. For the purposes of the Report, Fall 2018 data were used.

Degree Conferral: Awards conferred by a college, university, or other postsecondary education institution as official recognition for the successful completion of a program of studies.

Drive Time/Drive Shed: A geographic area that estimates the time it takes to drive by car to a specified location during rush-hour traffic. Drive Time areas are generated using ArcGIS Business Analyst.

Educational Attainment: Measurement of the share of residents age 25 and older with a higher education degree (associate's, bachelor's, or graduate/professional degree).

Eligibility Index: An index used for admission. A score that is calculated by multiplying high school grade point average (GPA) by 800 and adding the composite SAT (math and reading) score, or multiplying high school GPA by 200 and adding the composite ACT score to determine eligibility for admission to a CSU campus.

Enrollment Demand: The pool of qualified high school graduates and community college transfers, adjusted for historical propensity to enroll at a CSU.

Enrollment Projection: A calculation that estimates the number of future students who will enroll in higher education in the State of California at a future time. The CSU calculation is based on a statistical model using future population estimates and an extrapolation of a forecast for high school graduates from the Department of Finance, community college transfer rates, and certain other factors, as discussed in Section 3.2 of the Report.

Equity Gap: A disparity in educational achievement metrics, such as completion rates, among different socioeconomic, racial, gender, or other sociodemographic groups.

First-Generation: A student whose parent(s) or legal guardian(s) have not completed a higher education degree. The student is first in their family or household to attend a college/university.

Five Evaluated Locations: Five locations identified in the Budget Act of 2019 for future growth assessment: City of Concord, City of Chula Vista, City of Palm Desert, San Joaquin County (Stockton), and San Mateo County**.**

Floor-Area-Ratio (FAR): The measurement of a building's total first-floor area in relation to the size of the lot or parcel upon which it is built.

Full-Time Equivalent Student (FTES): A measurement of enrollment derived from the sum of total semester or quarter term credit units attempted at a given campus divided either by 15 for undergraduate students or 12 for graduate students.

General Fund: The primary California state fund from which state operating expenses are paid.

Graduation Rate: The cumulative percentage of students in a given fall term who graduated within a designated period of time. For example, the 4-year graduation rate is the proportion of entering students who earned a degree within 4 years (including the summer of the 5th year where summer is a preceding term).

Headcount: The number of all students, regardless of number of courses, actively enrolled in courses at the California State University.

Higher Education: Higher education, also called post-secondary education, third-level, or tertiary education, is delivered at universities, academies, colleges, seminaries, conservatories, and institutes of technology.

Highly Demanded Occupations: Occupations that offer long-term growth and contain a large number of open positions. Examples of current highly demanded jobs are finance, accounting, human resources, operations managers, computer and math-related jobs, and pre-K-grade 12 school teachers.

Historically Underrepresented Minorities: This group includes persons who identify with the following racial and ethnic groups: Black/African American, Hispanic/Latinx, and Native American/American Indian, in particular for a 10-year trend at the CSU or individual campuses in the context of this Report.

Identified Sites: The identified potential campus sites within the Five Evaluated Locations are: Chula Vista University and Innovation District, Concord Reuse Project Campus District, CSUSB Palm Desert Campus, Stockton University Park, San Joaquin County Fairground, Stockton Education and Enterprise Zone, and San Mateo County CCD – Cañada College.

Impaction: Impaction is the designation that a campus declares when there are more qualified applicants than seats made available. The primary underlying reason to declare impaction is to manage costs.

Instructional Space Utilization: A percentage measurement of how efficiently the CSU is using classroom and teaching laboratory space based on California's higher education space standards set by the State Legislature.

Knowledge-Based Economy: A local or regional economy in which growth depends on the quantity, quality, and availability of information and intellectual capital to a greater degree than the production of goods.

Land Availability: This Report studies the developable land area within designated site boundaries utilizing a variety of sources to determine potentially available land, beyond existing CSU Master Plans, for higher education use.

LEED Certified: LEED (Leadership in Energy and Environmental Design) is a globally recognized symbol of sustainability achievement and leadership. LEED provides a framework for healthy, highly efficient, and cost-saving green buildings.

Lower-Division Courses: Courses that are designated at the 100 and 200 level. Courses are typically taken by freshmen and sophomores, have limited college-level prerequisites, are not limited to students majoring in the field in which the course is offered, and may be taught at a university or community college.

Main Campus: This Report uses this term in two ways: 1) when referring to the relationship of an existing CSU campus and its associated Off-Campus Center or University Center; and 2) when referring to the existing 23 CSU campuses' data and tables in this Report (e.g., enrollment totals are broken down by "Main Campuses").

Master Plan: A master plan is a dynamic long-term physical planning document that provides a conceptual layout to guide future growth and development. A Campus Master Plan is a document that illustrates existing and anticipated facilities necessary to accommodate a specified enrollment level at an estimated target date or planning horizon. It is the physical representation of how a campus will implement its academic and strategic plans.

Off-Campus Center: An Off-Campus Center is established when an institution either rents or acquires a donated facility from which it intends to offer a number of academic courses and programs supported by the home campus budget. An Off-Campus Center typically has shared administration and academic programs with the larger campus to which it is organizationally linked.

Pell Grant: A federal grant awarded to university students based on financial need.

Physical Capacity: See Current Capacity and Planned Capacity definitions.

Place-Bound: Perceived or actual difficulty in leaving a geographic area due to limited financial resources, attachment to family, place of work, or other reason.

Planned Capacity: The potential enrollment capacity of a given campus approved by the Board of Trustees, measured in FTES. Planned Capacity is revised during the Campus Master Plan process.

Present Value (PV) of Academic Facility Capital Costs: The total cost of state funding needed for construction of academic facilities, including the Capital Cost, Capital Cost inflation, and the cost of debt service (bond interest and cost of bond issuance).

Redirection: Required as part of the 2017–2018 California State Budget Act and made available in Fall 2019. A process that ensures that applicants eligible for admission who cannot be accommodated at their first-choice campus(es) are redirected to another CSU campus without having to complete another application for admission.

Retention Rate: The percentage of students who continue to study in the next fall semester are counted in this rate. Retention rates are calculated based on a fall-t- fall enrollment.

Self-Support Courses: Courses that operate entirely through student fees and do not receive state aid.

Stakeholder: For the purposes of this Report, a person with an interest or concern in CSU expansion and growth, particularly in the Five Evaluated Locations. Key findings from stakeholder meetings at each of the Five Evaluated Locations informed this Report's criteria evaluation in Section 5.

State Support: State General Fund contributions to the CSU Operating Fund.

State Support Courses: Courses that are partially funded by the State of California.

Studied Clusters: Clusters that contain an Evaluated Location: Bay Area, Upper Central Valley, Inland Empire, and San Diego Clusters.

Sustainability: This Report measures campus sustainability based on three criteria: 1) condition, climate, and resilience factors of sites that lend themselves to resource conservation and adaptation; 2) infrastructure in place, or planning for infrastructural development, that demonstrates a proactive approach to address energy and environmental management; 3) that the site's means of operation and maintenance and its engagement with the community demonstrate commitment to advancing carbon neutrality and climate resilience goals and to preparing students for stewardship of the natural and built environment.

Traditional Campus: A campus that delivers a full breadth of curriculum and academic spaces from a single geographic location. The campus also offers the full spectrum of other campus-related functions, such as (but not limited to) residential life, student recreation and wellness, general administration, library, student union, and central plant and facilities support. The Report uses this term to refer to 7,500 FTES and 15,000 FTES non-site-specific academic plans. This is the model that aligns with the existing 23 CSU campuses.

Transfer Students: A student entering the reporting institution for the first time, but known to have previously attended a postsecondary institution.

Transit Shed: A geographic area that estimates the time it takes to commute via walking and existing public transportation (bus and rail) to a specified location. In this Report, transit shed areas are generated using an HR&A Advisors, Inc. tool.

Upper-Division Courses: Courses designated at the 300 and 400 levels, which required substantial college-level prerequisites. Typically taken by students with junior or senior level standing, with a focus on the field in which the course is taught.

University Center: A small satellite location tied to a main campus, with shared administration and often co-located with another university or institution.

Utilization: A metric used to measure the effective use of capacity space. Capacity space in the CSU is categorized as lecture, seminar, or teaching laboratory. The metric combines target scheduled hours per week for each space type and target seat occupancy rates by space type to define a target utilization equal to 100 percent. Utilization is measured by determining the average number of hours per week that stations in a given category of space are used by scheduled course sections, whether or not the course sections are of the same mode of instruction as the room itself.

Walk Score/Transit Score/Bike Score: Walk Score analyzes walking routes to nearby amenities to measure walkability. Transit Score measures access to frequent, nearby public transit. Bike Score measures bicycle infrastructure (lanes, trails, etc.), topography, destinations, and roadway connectivity to determine bikability. Walk/Transit/Bike Scores range from 0 (low access) to 100 (high access).

Workforce Demand: Occupational demand associated with projected industry growth.

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Acknowledgments

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