

OFFICE OF PUBLIC SCHOOL CONSTRUCTION
STAKEHOLDER MEETING
August 28, 2025

IMPLEMENTATION OF PROPOSITION 2 FOR THE SCHOOL FACILITY PROGRAM,
GLOBAL SCHOOL FACILITY PROGRAM REGULATORY AMENDMENTS,
AND
EVALUATION OF TRANSITIONAL KINDERGARTEN PUPILS IN SCHOOL FACILITY
PROGRAM ENROLLMENT PROJECTIONS

PURPOSE

The purpose of this meeting is to continue discussion with stakeholders on the implementation of the Kindergarten through Grade 12 Schools and Local Community College Public Education Facilities Modernization, Repair, and Safety Bond Act of 2024 (Proposition 2). Separate from Proposition 2 implementation, this meeting will also continue discussion of the topics of Global School Facility Program (SFP) Regulatory Amendments and Evaluation of Transitional Kindergarten Pupils in SFP Enrollment Projections, including their respective proposed regulatory amendments and stakeholder feedback.

Proposition 2 Implementation

The Office of Public School Construction (OPSC) is presenting proposed regulations and addressing feedback received for the Five-Year School Facilities Master Plan (Attachment A7) item previously presented at the February 13 and April 10, 2025 stakeholder meetings.

Non-Proposition 2 Topics

Separate from Proposition 2 implementation, OPSC is also continuing discussion on the following topics:

- Global SFP Regulatory Amendments (Attachment B1) – previously presented at the March 13 and May 8, 2025 stakeholder meetings.
- Evaluation of Transitional Kindergarten Pupils in SFP Enrollment Projections (Attachment C1) – previously presented at the February 20, 2025 stakeholder meeting.

BACKGROUND

Proposition 2, Global SFP Regulatory Amendments, and Evaluation of Transitional Kindergarten Pupils in SFP Enrollment Projections

Proposition 2 was approved by a majority of California's voters on November 5, 2024. To implement its provisions, existing SFP Regulations must be updated to align with the new statutory provisions. Additionally, OPSC seeks continued input on proposed regulatory amendments unrelated to Proposition 2 implementation.

OPSC requests stakeholder feedback regarding these changes. Each of the topics listed within the Purpose section of this report is broken out into its own attachments for stakeholder reference.

BACKGROUND (cont.)

Note on Proposed Regulation, Form and Grant Agreement Changes

This stakeholder item makes proposed changes to the regulations, forms, and grant agreements in effect as of the publication date of this item, August 21, 2025. This item does not reflect State Allocation Board (Board)-approved proposed regulation and form changes that are pending in the rulemaking process and have not gone into effect. Future stakeholder meeting items and Board agenda items will reflect proposed regulation and form changes once they go into effect.

AUTHORITY

See Attachments A7a, B1a, and C1a.

SUMMARY AND NEXT STEPS

For the Five-Year School Facilities Master Plan item, stakeholder feedback received from the last meeting may be found on Attachment D.

For the Global SFP Regulatory Amendments item, stakeholder feedback received from the last meeting may be found on Attachment E.

For the Evaluation of Transitional Kindergarten Pupils in SFP Enrollment Projections item, stakeholder feedback received from the last meeting may be found on Attachment F.

Staff will review any feedback obtained in today's meeting and anything received through close of business on Friday, September 12, 2025 and will address those suggestions in the next public meeting on the corresponding topic.

To submit written feedback after today's meeting, please email your suggestions to the OPSC Communications Team at OPSCCommunications@dgs.ca.gov.

ATTACHMENT A7

OFFICE OF PUBLIC SCHOOL CONSTRUCTION STAKEHOLDER MEETING August 28, 2025

PROPOSED REGULATORY AMENDMENTS FOR A FIVE-YEAR SCHOOL FACILITIES MASTER PLAN

PURPOSE

To continue discussion from the April 10, 2025 meeting regarding proposed regulatory amendments resulting from Assembly Bill (AB) 247, the Kindergarten through Grade 12 Schools and Local Community College Public Education Facilities Modernization, Repair, and Safety Bond Act of 2024 (Proposition 2), which was approved by a majority of California's voters on November 5, 2024, related to the submittal of a Five-Year School Facilities Master Plan (Master Plan).

AUTHORITY

See Attachment A7a.

DESCRIPTION

This report is a continuation of the discussion of the requirement for School Districts to submit a Master Plan as a condition of participating in the School Facility Program (SFP) pursuant to Education Code (EC) Section 17070.54, which was presented to stakeholders on February 13 and April 10, 2025. This report presents proposed amendments to SFP Regulations to implement the Master Plan requirement. Office of Public School Construction (OPSC) staff received written comments from multiple stakeholders following the April 10, 2025 stakeholder meeting on this topic. This report addresses those comments.

Attachment A7b contains proposed SFP regulatory amendments and Attachment A7c includes a proposed new form to implement the requirements for discussion.

In conjunction with this item, OPSC is also presenting the Master Plan Guidelines document under a separate, and related, report reflected on Attachments A7d and A7e.

BACKGROUND

At the February 13 and April 10 meetings, OPSC provided an overview of the new statutory requirements for a Master Plan codified in EC Section 17070.54. At the April 10, 2025 stakeholder meeting, OPSC presented concepts and sought input for aspects of Master Plan implementation regarding *Remaining Duration of Existing Master Plans, Inventory of Existing Facilities and Sites, Enrollment Projection, and Capital Planning Budget Requirements and Deliverables*. OPSC also provided responses to feedback received following the February 13, 2025 meeting. To further support School Districts, OPSC developed a webpage on the

BACKGROUND (cont.)

new Master Plan statutory requirement that includes samples of local governing board resolutions for program applicants to acknowledge this statutory requirement. The webpage is linked here: [School Facility Master Plans](#).

STAFF ANALYSIS/DISCUSSION

This report provides responses to the feedback OPSC received during and/or after the April 10 meeting and presents proposed regulations for the implementation of the statute.

Summary of Stakeholder Feedback

OPSC thanks everyone that was able to participate in the previous meetings on this topic. OPSC appreciates the thoughtful and thorough feedback that was submitted. The table that follows contains summaries of letters received following the April 10 meeting. Some letters made similar statements and were of such a length that it was not feasible to include all of the text below. Therefore, for reference, the original stakeholder letters are included as Attachment D.

Stakeholder Feedback	OPSC Response
<p>1. Several stakeholders commented on the proposed requirement that there must be at least four years remaining on the Master Plan term at the time of application submittal, and that districts must update their Master Plans when submitting new applications if there are fewer than four years remaining.</p> <p>Several stakeholders requested that OPSC reconsider this requirement and expressed concerns. Several stakeholders opined that this requirement to effectively update the five-year Master Plan annually is not supported by the statute. Additionally, stakeholders cited potential negative impacts on districts, including:</p> <ul style="list-style-type: none"> • The five-year plan would only be valid for one year, which is contrary to how districts undertake long-term planning, which can take several years to finalize. • It would generate additional expense and administrative burden. 	<p>1. OPSC acknowledges and appreciates stakeholders' feedback on this proposed requirement and the alternative recommendations stakeholders provided.</p> <p>Upon further consideration and review of stakeholder input, OPSC has provided an updated proposal in this item that is intended to provide flexibility to School Districts by ensuring there a period of up to five years during which School Districts may submit a single or multiple applications following submittal of a complete, valid Master Plan. If a district elects to participate in the SFP more than once during this five-year period, the district would only be required to update the Master Plan during this period if there are changes that materially affect components of the Master Plan that are required by statute.</p>

STAFF ANALYSIS/DISCUSSION (cont.)

Stakeholder Feedback	OPSC Response
<p>1. (cont.)</p> <ul style="list-style-type: none"> • It would create a hurdle to participation in the SFP, especially for small School Districts. • Because districts must already update eligibility applications, the proposed process would be duplicative. <p>One stakeholder recommended that a Five-Year Master Plan be considered valid for five years from local governing board approval, and districts should not be required to submit a new or updated Master Plan for a specific application if the five-year term expires after the application was submitted to OPSC.</p>	<p>1. (cont.) Updates to the valid Master Plan within the five-year period following local governing board approval would be dependent on the individual district's self-certification of whether a material change has occurred to statutorily required components of the Master Plan, and frequency of participation in the SFP. For additional flexibility in this case, OPSC proposes that districts could provide a local governing board resolution with information on the material updates, in lieu of submitting an amended Master Plan.</p> <p>OPSC agrees that the statute requires submittal of a five-year master plan as a condition of participation in the SFP and that statute does not specify the time period for the five-year span. However, the statute also refers to an <i>updated plan</i>. Additionally, EC Section 17070.54(f) requires a district to "update its school facilities master plan to reflect any changes in enrollment, capacity, or other areas, as appropriate for purposes of participating in the school facilities program." The revised proposal presented in this item is intended to align with these statutory requirements while minimizing potential impacts to districts if there have not been material changes to statutorily required components of the Master Plan within a five-year period.</p>
<p>2. In summary, the stakeholder states that it intends to publish a comprehensive guide to best practices in facilities master planning and has recommendations on additional components of the Master Plan that should be required. For example, the stakeholder recommends that a facilities assessment,</p>	<p>2. OPSC acknowledges and appreciates the stakeholder's feedback and recommendations. OPSC's approach to implementing the Master Plan requirement is to closely align the proposed regulations with the statute. Recommendations for additional</p>

STAFF ANALYSIS/DISCUSSION (cont.)

Stakeholder Feedback	OPSC Response
<p>2. (cont.) such as an updated version of the Facilities Inspection Tool (FIT), be added as a required component of the Master Plan, as well as expansion of the inventory requirements to include information on key building systems, such as Heating, Ventilation, and Air Conditioning (HVAC) equipment.</p> <p>The stakeholder also expresses concerns about outdated resources available to districts for master planning guidance, in part indicating that there should be guidance for districts to incorporate stakeholder input and prioritizing facilities investments to promote efficiency and equity across a district.</p> <p>It is also noted that many districts satisfy Local Control and Accountability Plan (LCAP) Priority 1 by summarizing the results of FIT reports. The stakeholder indicates that it seems clear that the legislative intent of this requirement is to ensure that facility assessments and deficiencies are considered and incorporated as part of the Master Plan process. The stakeholder expresses that this bolsters the importance of attention to its recommendation that the Master Plan should include an analysis of facilities assessment, deficiencies, and adequacy.</p>	<p>2. (cont.) components and best practices are included in the accompanying Guidelines document that is also required by the statute.</p>
<p>3. In summary, the stakeholder states that the Master Plan should include a facility condition assessment encompassing major systems, subsystems and components. Multiple references, including those from other states, are cited in support of this recommendation.</p>	<p>3. OPSC acknowledges and appreciates the stakeholder's feedback and recommendation. OPSC's approach to implementing the Master Plan requirement is to closely align the proposed regulations with the statute. Recommendations for additional components and best practices are included in the accompanying Guidelines document that is also required by the statute.</p>

STAFF ANALYSIS/DISCUSSION (cont.)

Stakeholder Feedback	OPSC Response
<p>4. The stakeholder expressed appreciation for the flexibility to provide required data in varying formats.</p>	<p>4. OPSC thanks the stakeholder for this input.</p>
<p>5. In summary, the stakeholder encourages OPSC to make technical assistance available to School Districts that seek to have their Master Plans reviewed prior to submission to their local governing boards for approval. The stakeholder indicates this support would be particularly important when a district is submitting a Master Plan for the first time, to help ensure the completeness of the plan and to avoid missing elements.</p>	<p>5. In addition to future technical assistance, OPSC is presenting the Master Plan Guidelines document that is also required by the statute to guide participating School Districts in the development of the Master Plan through the inclusion of multiple examples of each required element. In addition, OPSC has developed a webpage dedicated to providing resources to School Districts in meeting this new requirement.</p>
<p>6. The stakeholder comments on the deferred maintenance plan requirement. OPSC proposes that “a district could submit a URL link to the locally approved maintenance plan or to the local board agenda where it was approved to demonstrate compliance.”</p> <p>The stakeholder concurs that submitting a URL link is an efficient approach to complying with this requirement for many districts. However, the stakeholder recommends that in addition to the URL link, OPSC allow other options for verification, such as hard copy submittal, particularly to meet the needs of small rural schools.</p>	<p>6. OPSC intends to accept the Master Plan in various electronic formats to provide options for School Districts to comply with the requirements. These options will include URL links and the ability to upload documents in PDF and other formats to accommodate School Districts.</p>

STAFF ANALYSIS/DISCUSSION (cont.)

Stakeholder Feedback	OPSC Response
<p>7. The stakeholder indicates that the inventory “guidelines or standards” should include some form of facility condition assessment encompassing major systems, subsystems, or components. It is unclear how a Master Plan lacking such an assessment would serve the core goals of facilities master planning, including needs assessment, appropriate project prioritization, and strategic resource deployment.</p> <p>The stakeholder notes that California School District Master Plans often already treat facility condition assessment as an integral part of the master-planning process.</p>	<p>7. OPSC acknowledges and appreciates the stakeholder’s feedback and recommendation. OPSC’s approach to implementing the Master Plan requirement is to closely align the proposed regulations with the statute. Recommendations for additional components and best practices are included in the accompanying Guidelines document that is also required by the statute. Additionally, OPSC notes that although specified components must be included in a Master Plan pursuant to statutory requirements for participation in the SFP, districts can opt to include any additional components that benefit their long-term planning.</p>
<p>8. In summary, the stakeholder calls to implement Proposition 2 in a way that integrates planning, accountability, and data systems to ensure school infrastructure supports educational goals, climate readiness, and equity and offers considerations and guidance for four issues that support addressing climate readiness in a facilities master plan: (1) energy resilience, electrification, and decarbonization, (2) indoor environmental quality, (3) schoolyard greening, and (4) climate risk assessment. For each issue there is a definition, considerations around the connection to climate resilience and already existing policy, and guidance on how to connect this issue to facilities master planning.</p>	<p>8. OPSC is presenting the Master Plan Guidelines document that is also required by the statute to guide participating School Districts in the development of the Master Plan through the inclusion of multiple examples of each required element. In addition, OPSC has developed a webpage dedicated to providing resources to School Districts in meeting this new requirement. As currently drafted, this document identifies the statutorily required elements of the Master Plan and also includes many resources for School Districts to consider when planning their projects, such as the ones suggested by this stakeholder.</p>

Summary of Proposed SFP Regulations

OPSC proposes two new definitions to be added to the SFP Regulations, two new sections to be added to the SFP Regulations, and a new required form to guide School Districts in the preparation and submittal of a complete Master Plan. The first new Section 1859.18 specifies how often a Master Plan must be submitted or

STAFF ANALYSIS/DISCUSSION (cont.)

updated and lists the required components of a complete Master Plan in accordance with the minimum requirements listed in EC Section 17070.54. The second new Section 1859.18.1 defines when a Master Plan must be submitted depending on the program for which the School District has submitted an application for funding. A summary of each section follows.

Attachment A7b contains the proposed SFP regulatory amendments.

Proposed Amendments to SFP Regulation Section 1859.2 Definitions

Amendments are proposed to add two definitions to this Section: "Form SAB 50-MP," the newly proposed Five-Year School Facilities Master Plan Checklist, and "Master Plan," a document or compilation of documents approved by the governing board of a School District that reflects at least a five-year period and that includes all of the required elements, which may be submitted electronically to OPSC, either as a digital file or via a Uniform Resource Locator (URL).

Proposed SFP Regulation Section 1859.18 Five-Year School Facilities Master Plan

This proposed new section is inserted into the SFP Regulations under Article 3, SFP Application Procedure, as submittal of the Master Plan is a condition of participation in the SFP for applications submitted on or after October 31, 2024. Comments on the notable subsections are provided below.

Introductory text specifies that a copy of the local governing board approval of the Master Plan must be submitted with the Master Plan.

Subsection (a) indicates when the local governing board must have approved the Master Plan in relation to the required time frame for submittal of the Master Plan for the associated application for funding. Subsection (a) also specifies that for a period of five years following the date of local governing board approval of a valid Master Plan, the School District may submit additional applications for funding without resubmitting the previous, valid Master Plan, except as specified in subsection (b).

Subsection (b) specifies the conditions under which a valid Master Plan submitted by a School District must be updated as a required component of an additional application for funding submitted within five years of the original Master Plan submittal. Specifically, OPSC proposes that an updated Master Plan will only be required as a component of an additional application for funding if changes in enrollment, capacity, or other areas have materially affected components of the Master Plan required in subsection (d). This provision clarifies EC Section 17070.54(f), which requires districts to update their Master Plans to reflect any changes in enrollment, capacity, or other areas, as appropriate for purposes of participating in the SFP. Additionally, subsection (b)(2) provides flexibility by allowing submittal of a governing board resolution updating the required Master

STAFF ANALYSIS/DISCUSSION (cont.)

Plan components that were materially affected and describing the change, in lieu of submittal of a new Master Plan.

Subsection (c) requires School Districts to submit an updated, valid Master Plan as a required component of additional applications for funding once a period of five years has elapsed following the date of local governing board approval of the initial Master Plan submittal. This provision adds clarity to the requirement in Education Code Section 17070.54(a) that refers to submittal of a five-year school facilities Master Plan, or updated five-year school facilities Master Plan.

Subsection (d) lists the required components of a complete Master Plan and adds clarifying details where necessary to ensure consistent compliance with the statutory components. The format of the Master Plan components would be accepted in narrative, charts, graphs and/or tables as appropriate for the information type. For example, subsection (d)(1) describes how to provide an estimate of eligibility for state bond funding as required by EC Section 17070.54 (b) in narrative format by program. Subsection (d)(2) describes the necessary components of the inventory of facilities and sites from EC Sections 17070.54 (c)(1) and (d)(1) through (6), including which facilities must be included and how to determine their age. Subsections (d)(3) through (9) primarily mirror the statutory language.

Proposed SFP Regulation Section 1859.18.1 – Master Plan Submittal Time Frames
This new section establishes the required time frames for School Districts to submit a complete Master Plan. EC Section 17070.54 became operative on November 6, 2024, following voter approval of Proposition 2, and the Master Plan requirement applies to applications submitted to OPSC on and after October 31, 2024. However, in recognition of the time needed to develop these program regulations, the State Allocation Board (SAB) adopted a framework of submittal dates for completed Master Plans on December 3, 2024, along with a process for submittal of governing board resolutions acknowledging the Master Plan requirement. This proposed new Regulation Section 1859.18.1 implements the SAB's previously adopted policies and expands on programs and application types that were not yet contemplated, such as design and site applications for funding and the Small School District Program.

For ease of reference, the tables below present the timelines for submittal of a completed Master Plan by program and application type. They also include the required timelines for submittal of the local governing board resolution that acknowledges an apportionment may be rescinded for failure to submit a valid Master Plan by the specified timeline. In some cases, the timeline depends on when the regulations are in effect. Proposed SFP Regulations are in effect after the Board has approved the regulations and the formal rulemaking process through the Office of Administrative Law (OAL) has been completed.

STAFF ANALYSIS/DISCUSSION (cont.)

New Construction and Modernization Applications (Full Grant)		
Date of Application Submittal	When is a Board Resolution Required?	When is Master Plan required?
October 31, 2024 through 12 months from OAL approval of Regulations	At the time of application submittal*	Within 90 days of notification of application processing
>12 months after OAL approval of Regulations	N/A	At the time of application submittal

*Applications submitted between October 31, 2024 and December 3, 2024 were provided a 60-day notification to submit the required board resolution.

New Construction and Modernization Applications for Design and/or Site Funding		
Date of Application Submittal	When is a Board Resolution Required?	When is Master Plan required?
October 31, 2024 through 12 months from OAL approval of Regulations	At the time of application submittal*	By the time the application request for full grant funding is submitted to OPSC using the <i>Application for Funding</i> (Form SAB 50-04)
>12 months after OAL approval of Regulations	At the time of application submittal	By the time the application request for full grant funding is submitted to OPSC using the Form SAB 50-04

*Applications submitted between October 31, 2024 and December 3, 2024 were provided a 60-day notification to submit the required board resolution.

Facility Hardship Program and Seismic Mitigation Program Applications		
Date of Application Submittal	When is a Board Resolution Required?	When is Master Plan required?
On or after October 31, 2024	At the time of application submittal*	By the time of Substantial Progress certification or with the 100 percent complete <i>Expenditure Report</i> (Form SAB 50-06), whichever occurs first

*Applications submitted between October 31, 2024 and December 3, 2024 were provided a 60-day notification to submit the required board resolution.

STAFF ANALYSIS/DISCUSSION (cont.)

Career Technical Education Facilities Program Applications*		
Date of Application Submittal	When is a Board Resolution Required?	When is Master Plan required?
On or after October 31, 2024	At the time of application submittal	By the time of Substantial Progress certification or with the 100 percent complete Form SAB 50-06, whichever occurs first
*Joint Powers Authorities are exempt from the Master Plan requirement.		

Charter School Facilities Program (CSFP) Applications*		
Date of Application Submittal	When is a Board Resolution Required?	When is Master Plan required?
School Districts that submitted a Form SAB 50-04 to request a Final Apportionment on or after October 31, 2024	At the time of application submittal	By the time of Substantial Progress certification or with the 100 percent complete Form SAB 50-06, whichever occurs first
If the School District receives a Preliminary Apportionment on or after October 31, 2024 (2025 CSFP Filing Round and beyond)	At the time of application submittal	By the time the application request for Final Apportionment is submitted to OPSC using Form SAB 50-04
*Independent Charter Schools are exempt from the Master Plan requirement.		

Small School District Program Applications		
Date of Application Submittal	When is a Board Resolution Required?	When is Master Plan required?
On or after October 31, 2024	At the time of application submittal for a Preliminary Apportionment	By the time the application request for Final Apportionment is submitted to OPSC using Form SAB 50-04

Natural Disaster Assistance Applications		
Date of Application Submittal	When is a Board Resolution Required?	When is Master Plan required?
On or after October 31, 2024	At the time of application submittal	By the time of submittal of the 100 percent complete Form SAB 50-06

STAFF ANALYSIS/DISCUSSION (cont.)**Proposed Master Plan Checklist Form**

To facilitate Master Plan compliance, OPSC developed the proposed *Five-Year Master Plan Checklist* (Form SAB 50-MP). It is created to assist School Districts and OPSC in verifying that all required components are included in the submitted Master Plan. The form contains four sections containing checkboxes the School District will fill in as they proceed through the form. OPSC has taken into consideration that School Districts have created their master plans using various formats. Districts will be able to submit their master plans as a document (pdf), or as an external link with URLs outlining required components of the master plan. There are fields to enter page numbers if the School District submits documents in PDF or URL format, if the master plan is web-based.

School Districts will complete and submit a Form SAB 50-MP along with the completed Master Plan. OPSC is currently working on improvements to OPSC Online that will enable a District to upload their Master Plan documents directly to their profile.

The proposed Form SAB 50-MP may be found on Attachment A7c.

Proposed Certification

On Attachment A7f, OPSC proposes to add a new certification to the *Application for Funding* (Form SAB 50-04), *Application for Charter School Preliminary Apportionment* (Form SAB 50-09), *Application for Career Technical Education Facilities Funding* (Form SAB 50-10), and the *Application for Natural Disaster Assistance* (Form SAB 195).

This self-certification by the Superintendent or Authorized District Representative is to provide flexibility to School Districts in indicating whether the master plan has been approved and already filed with OPSC, whether there are material changes to the Master Plan since its approval, and acknowledgement that the Apportionment may be rescinded for failure to submit a valid Master Plan by the timeline required for the application.

OPSC welcomes further feedback on these topics.

AUTHORITY**Education Code (EC) Section 17070.54 – General Provisions**

- (a) As a condition of participating in the school facilities program, a school district shall submit to the department a five-year school facilities master plan, or updated five-year school facilities master plan, approved by the governing board of the school district.
- (b) The school facilities master plan submitted pursuant to subdivision (a) shall include information on the school district's eligibility for state bond funding pursuant to this chapter.
- (c) The school facilities master plan shall include, but is not limited to, all of the following information:
 - (1) An inventory of existing facilities, sites, and property pursuant to subdivision (d).
 - (2) Existing classroom capacity, as determined pursuant to Sections 17071.10 and 17071.25.
 - (3) Projected enrollment growth for the applicable school district over the next five years, accounting for growth pursuant to Sections 17071.75 and 17071.76.
 - (4) A capital planning budget outlining the applicable school district's projects.
 - (5) The financing and other funding sources that would be used to support the acquisition of the applicable schoolsite, new construction project, modernization project, and lead testing and remediation projects.
 - (6) Verification of the applicable school district's current assessed value from the appropriate local government entity that collects and maintains this information.
 - (7) The school district's deferred maintenance plan certified pursuant to Section 17070.75.
 - (8) A narrative describing how the school facilities master plan is consistent with the goals, actions, and services identified in the school district's local control and accountability plan for the first state priority, as described in paragraph (1) of subdivision (d) of Section 52060, as it relates to school facilities.
- (d) The department, in consultation with the State Department of Education, shall develop guidelines that school districts may use to guide the development of the school facilities master plan required as a condition of participating in the school facilities program. The department, in consultation with the State Department of Education, shall develop guidelines or standards that school districts shall use to develop and submit the inventory required pursuant to paragraph (1) of subdivision (c) for every school in the school district, including, but not limited to, all of the following:
 - (1) The year each building at the school that is currently used for instructional purposes was constructed.
 - (2) The square footage of each building that is currently used for instructional purposes.
 - (3) The year, if any, each building that is currently used for instructional purposes was last modernized.
 - (4) The pupil capacity of the school.
 - (5) The age and number of portable buildings at the school.
 - (6) Whether the school has any of the following:
 - (A) A cafeteria or multipurpose room or hybrid facility.

AUTHORITY (cont.)

- (B) A library.
- (C) A gymnasium.
- (e) The Controller shall include the instructions necessary to verify that all of the required components of this section are reflected in a participating school district's school facilities master plan in the audit guide required by Section 14502.1, as part of the audit procedures required pursuant to Section 41024.
- (f) The school district shall update its school facilities master plan to reflect any changes in enrollment, capacity, or other areas, as appropriate for purposes of participating in the school facilities program.

(Added by Stats. 2024, Ch. 81, Sec. 5. (AB 247) Effective July 3, 2024. Operative November 6, 2024, pursuant to Sec. 30 of Ch. 81.)

EC Citations Referenced in Section 17070.74

Note: Hyperlinks to the EC citations are provided below. The sections that were amended in 2024 are notated by *italics*.

EC Section 14502.1 – Financial and Compliance Audits[EC Section 14502.1.](#)

- (a) The Controller, in consultation with the Department of Finance and the department, shall develop a plan to review and report on financial and compliance audits. The plan shall commence with the 2003–04 fiscal year for audits of school districts, other local educational agencies, and the offices of county superintendents of schools. The Controller, in consultation with the Department of Finance, the department, and representatives of the California School Boards Association, the California Association of School Business Officials, the California County Superintendents Educational Services Association, the California Teachers Association, the California Society of Certified Public Accountants, *and the County Office Fiscal Crisis and Management Assistance Team*, shall recommend the statements and other information to be included in the audit reports filed with the state, and shall propose the content of an audit guide to carry out the purposes of this chapter. A supplement to the audit guide may be suggested in the audit year, following the above process, to address issues resulting from new legislation in that year that changes the conditions of apportionment. The proposed content of the audit guide and any supplement to the audit guide shall be submitted by the Controller to the Education Audit Appeals Panel for review and possible amendment.
- (b) ...

EC Section 17070.75 – Routine Restricted Maintenance Requirements[EC Section 17070.75.](#)

AUTHORITY (cont.)**EC Section 17071.10 - Existing School Building Capacity**[EC Section 17071.10.](#)

(a) The calculation determined by this article shall be made on a one-time basis, and will be used as the baseline for eligibility determinations pursuant to this chapter.

(b) (1) Each school district that elects to participate in the new construction program pursuant to this chapter shall submit to the board a one-time report of existing school building capacity.

(2) *The information reflected in the report described in paragraph (1) shall be included in a school facilities master plan submitted pursuant to Section 17070.54.*

(c) Notwithstanding subdivisions (a) and (b), a school district newly formed, reorganized, or affected by reorganization, pursuant to an election that occurred on or after November 4, 1998, shall calculate or recalculate its existing school building capacity pursuant to regulations adopted by the board.

(d) *Notwithstanding subdivisions (a), (b), and (c), a school district that elects to participate in the new construction program or modernization program pursuant to this chapter after November 5, 2024, shall submit an updated report of the school district's existing school building capacity to the board.*

EC Section 17071.25 - Existing School Building Capacity[EC Section 17071.25.](#)**EC Section 17071.75 New Construction Eligibility Determination**[EC Section 17071.75.](#)

(a)...

...
(g) *For a school district with an enrollment of 2,500 or fewer, an adjustment in enrollment projections shall not result in a loss of ongoing eligibility to that school district for a period of five years from the date of the approval of eligibility by the board.*

EC Section 17071.76 – High School Attendance Area[EC Section 17071.76.](#)**EC Section 41024 – Accounting Regulations, Budget Controls and Audits**[EC Section 41024.](#)**EC Section 52060 – Local Control and Accountability Plans**[EC Section 52060.](#)

PROPOSED REGULATIONS

Section 1859.2 Definitions

....

“Form SAB 50-MP” means the *Five-Year School Facilities Master Plan Checklist*, Form SAB 50-MP (New xx/25), which is incorporated by reference.

“Master Plan” means a document or compilation of documents approved by the governing board of a School District that reflects at least a five-year period and includes all of the required elements identified in Section 1859.18 pursuant to Education Code Section 17070.54. This documentation may be submitted electronically to OPSC, either as a digital file or via a Uniform Resource Locator (URL).

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Article 3. SFP Application Procedure

Section 1859.18 Five-Year School Facilities Master Plan

For applications submitted on or after October 31, 2024, as a condition of participating in the SFP, a School District must submit a valid Master Plan to OPSC pursuant to Education Code Section 17070.54. A copy of the local governing board approval or board minutes must be submitted with the Master Plan.

- (a) The date of local governing board approval of the Master Plan must be no more than five years earlier than the applicable deadline for submittal of the Master Plan to OPSC in Section 1859.18.1 for the type of the associated application for funding. For a period of five years following the date of local governing board approval of a Master Plan determined by OPSC to be a valid Master Plan, the School District may submit additional applications for funding to OPSC without resubmitting the previous, valid Master Plan, except as specified in subsection (b).
- (b) For a period of five years following the date of local governing board approval of a Master Plan determined by OPSC to be a valid Master Plan, the School District must submit one of the following to OPSC as a required component of an additional application for funding, only if any changes in enrollment, capacity, or other areas have materially affected components of the Master Plan required in subsection (d):
 - (1) An updated, valid Master Plan with all required information.
 - (2) A governing board resolution updating the components required in subsection (d) that were materially affected and a description of what changed.
- (c) Once a period of five years has elapsed following the date of a previous local governing board approval of a Master Plan determined by OPSC to be a valid Master Plan, the School District shall submit an updated, valid Master Plan as a required component of additional applications for funding. The updated Master Plan must reflect a new five-year period as

supported by a copy of the local governing board approval or board minutes. Following submittal of an updated Master Plan, subdivision (b) shall apply.

(d) In the form of narratives, charts, graphs, and/or tables as appropriate, a valid Master Plan shall include, but is not limited to, all of the following information:

(1) An estimate of the School District's eligibility for state bond funding pursuant to Education Code Section 17070.54(b), as follows:

(A) For the New Construction Program, the School District must provide a narrative which includes the School District's existing New Construction eligibility approved by the Board or potential for New Construction eligibility based on enrollment trends in the School District. The narrative may include the estimated dollar value of potential funding based on the current per-unhoused-pupil grant amount as provided by Education Code Section 17072.10(a) and SFP Regulation Sections 1859.71 and 1859.71.1.

(B) For the Modernization Program, the School District must provide a narrative or list of the School District's existing Modernization eligibility approved by the Board or potential for Modernization eligibility for each school site. The narrative may include the estimated dollar value of potential funding based on the current pupil grant amount as provided by Education Code Section 17074.10(a) and SFP Regulation Sections 1859.78 and 1859.78.3.

(C) For the Facility Hardship Program and Seismic Mitigation Program, the School District must provide a narrative describing the School District's existing conceptual, unfunded, or funded projects approved by the Board or potential future projects. The narrative may include the estimated total project cost to mitigate the health and safety threat as defined by Regulation Sections 1859.82.1 and 1859.82.2.

(D) For the Charter School Facilities Program, the School District must provide a narrative describing the School District's existing Charter School Facilities Program Preliminary Apportionments approved by the Board or potential future applications to the Charter School Facilities Program. The narrative may include the estimated total project cost based on Regulation Sections 1859.163.1 and 1859.163.5, respectively. If bond authority for this program is exhausted at the time the School District is preparing the Master Plan, this narrative is not required.

(E) For the Career Technical Education Facilities Program, the School District must provide a narrative describing the School District's existing Career Technical Education Facilities Program Apportionments approved by the Board or potential future applications to the Career Technical Education Facilities Program. The narrative may include the estimated total project cost pursuant to Regulation Section 1859.193. If the School District does not operate a comprehensive high school or bond authority for this program is exhausted at the time the School District is preparing the Master Plan, this narrative is not required.

(F) For any other program under Chapter 12.5 of the Education Code, the School District must provide a narrative describing the School District's eligibility and potential funding for state bond funding, as applicable.

(2) An inventory of existing school facilities, sites, and property for each school in the School District, including, but not limited to, all of the following:

(A) The year each building that is currently used for instructional purposes was constructed. The year constructed shall be determined in accordance with Section 1859.60.

(B) The square footage of each building that is currently used for instructional purposes.

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- (C) The year, if any, each building that is currently used for instructional purposes was last modernized with either local or state funds.
- (D) The pupil capacity of each school, listed by grade level including Special Day Class, Non-severe and Severe pupils.
- (E) The age, determined in accordance with Section 1859.60, and number of portable buildings.
- (F) Whether each school has any of the following ancillary facilities:
 - 1. A cafeteria
 - 2. A kitchen
 - 3. A multipurpose room or hybrid multipurpose room
 - 4. A library
 - 5. A gymnasium or hybrid gymnasium
 - 6. An auditorium and/or performing arts facility
 - 7. Athletic facilities, including but not limited to, pools, stadiums, etc.
 - 8. Career technical education facilities, including but not limited to, barns, shops, and outdoor student work areas.
- (3) Existing classroom capacity at each school site, as determined pursuant to Education Code Sections 17071.10 and 17071.25.
- (4) Projected enrollment growth for the School District over the next five years, accounting for growth pursuant to Education Code Sections 17071.75 and 17071.76.
- (5) A capital planning budget outlining the School District's significant capital outlay projects included in the Master Plan. The budget shall outline the estimated costs for each project for each fiscal year.
- (6) The financing and other funding sources that would be used to support the acquisition of any applicable school site, new construction project, modernization project, and lead testing and remediation projects included in the Master Plan.
- (7) Verification of the School District's current assessed value from the county audit controller or other appropriate local government entity that collects and maintains this information.
- (8) The School District's deferred maintenance plan certified by the local governing board pursuant to Education Code Section 17070.75.
- (9) A narrative describing how the Master Plan is consistent with the goals, actions, and services identified in the School District's local control and accountability plan for the first state priority, as described in paragraph (1) of subdivision (d) of Education Code Section 52060, as it relates to school facilities.

Section 1859.18.1 Master Plan Submittal Time Frames

When submittal of a Master Plan or updated Master Plan is required pursuant to subsections (a) through (c) of Section 1859.18, inclusive, School Districts shall submit a complete Master Plan and a local governing board resolution, as applicable, to OPSC within the time frames stated below. If a complete Master Plan or a local governing board resolution is not submitted within the specified time frame, the Form SAB 50-04 shall be returned or the Apportionment may be rescinded.

- (a) For Approved Applications for funding received on or after October 31, 2024, applicants to the Facility Hardship and Seismic Mitigation Programs in Sections 1859.82.1 and 1859.82.2 must submit a Master Plan as follows:
 - (1) A complete Master Plan must be submitted with the substantial progress certification or with the 100 percent complete Form SAB 50-06, whichever occurs first.

(2) A local governing board resolution acknowledging the Apportionment may be rescinded for failure to submit a valid Master Plan within the timeline specified in (a)(1) must be submitted with the Approved Application.

(b) Applicants to the New Construction and Modernization Programs beginning with Section 1859.70 must submit a Master Plan as follows:

(1) For Approved Applications received on or after October 31, 2024 and through 12 months from [the OAL approval date of these regulations]:

(A) A complete Master Plan must be submitted within 90 days of notification of application processing.

(B) A local governing board resolution acknowledging the Apportionment may be rescinded for failure to submit a valid Master Plan within the timeline specified in (b)(1)(A) must be submitted with the Approved Application.

(2) For Approved Applications received after 12 months from [insert OAL approval date], a complete Master Plan must be submitted concurrently with submittal of the Approved Applications.

(3) Forms SAB 50-04 for design and/or site funding, submitted pursuant to Section 1859.81.1, must include a local governing board resolution acknowledging the Apportionment may be rescinded for failure to submit a valid Master Plan with an application for full grant funding in accordance with subdivision (1) or (2) above as applicable based on the OPSC receipt date of an Approved Application for funding.

(c) School District applicants to the Career Technical Education Facilities Program, beginning with Section 1859.190, must submit a Master Plan as follows:

(1) A complete Master Plan must be submitted with the substantial progress certification or with the 100 percent Form SAB 50-06, whichever occurs first.

(2) A local governing board resolution acknowledging the Apportionment may be rescinded for failure to submit a valid Master Plan within the timeline specified in (c)(1) must be submitted with the Approved Application for Career Technical Education Facilities Project Funding.

(d) School District applicants to the Charter School Facilities Program beginning with Section 1859.160 must submit a Master Plan as follows:

(1) If the School District received a Preliminary Charter School Apportionment prior to October 31, 2024, and a Form SAB 50-04 requesting a Final Charter School Apportionment is received on or after October 31, 2024, a complete Master Plan must be submitted with the substantial progress certification or with the 100 percent complete Form SAB 50-06, whichever occurs first.

(2) A local governing board resolution acknowledging the Apportionment may be rescinded for failure to submit a valid Master Plan within the timeline specified in (d)(1) must be submitted with the Form SAB 50-04 application for Final Charter School Apportionment.

(3) If the School District receives a Preliminary Charter School Apportionment on or after October 31, 2024, the Master Plan must be submitted with the Form SAB 50-04 request for Final Charter School Apportionment.

(4) A local governing board resolution acknowledging the Apportionment may be rescinded for failure to submit a valid Master Plan within the timeline specified in (d)(3) must be submitted with the Form SAB 50-09, Application for Preliminary Charter School Apportionment.

(e) Applicants to the Small School District Program beginning with Section 1859.156 must submit a Master Plan as follows:

(1) If the School District receives a Preliminary Small School District Apportionment on or after October 31, 2024, the Master Plan must be submitted with the Form SAB 50-04 request for Final Small School District Apportionment.

(2) A local governing board resolution acknowledging the requirement in (e)(1) must be submitted with the Form SAB 50-12 requesting a Preliminary Small School District

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Apportionment.

(f) Applicants to the Natural Disaster Assistance Program in Sections 1859.84, 1859.84.1, and 1859.81.2 must submit a Master Plan as follows:

(1) A complete Master Plan must be submitted with the 100 percent Form SAB 50-06.

(2) A local governing board resolution acknowledging the Apportionment may be rescinded for failure to submit a valid Master Plan within the timeline specified in (f)(1) must be submitted with the Form SAB 195.

Note: Authority cited: Sections 17070.35, Education Code.

Reference: Sections 17070.54, 17070.75, 17071.10, 17071.25, 17071.75, 17071.76 and 41024., Education Code.

ATTACHMENT A7c

STATE OF CALIFORNIA
FIVE-YEAR MASTER PLAN CHECKLIST
SCHOOL FACILITY PROGRAM
Form SAB 50-MP (NEW xx/25)

STATE ALLOCATION BOARD
OFFICE OF PUBLIC SCHOOL CONSTRUCTION

Page 1 of 4

SCHOOL DISTRICT/COUNTY OFFICE OF EDUCATION	FIVE-DIGIT DISTRICT CODE NUMBER (SEE CALIFORNIA SCHOOL DIRECTORY)
COUNTY	
DATE OF SUBMITTAL	

In accordance with Education Code Section 17070.54 and School Facility Program (SFP) Regulation Section 1859.18, a School District that participates in the SFP on or after October 31, 2024, must submit a five-year school facilities master plan or an updated version of the plan, formally approved by the School District's governing board.

GENERAL INSTRUCTIONS

This checklist is designed to support School Districts in the submittal of their Five-Year School Facilities Master Plan (Master Plan) by ensuring all required components are included. For each document provided, the School District must include the corresponding page number and, if applicable, the Uniform Resource Locator (URL) of the Master Plan to ensure clear reference. For further guidance or additional details on any item, refer to the Five-Year School Facilities Master Plan Guidelines available on the Office of Public School Construction's (OPSC) [website](#).

Section 1 – Master Plan Type

The local governing board's approval of the submitted Master Plan must have occurred no more than five years earlier than the applicable deadline for submittal of the Master Plan to OPSC in SFP Regulation Section 1859.18.1, based on the type of the associated application for funding. In addition, documented proof of the date of the local governing board's approval must be submitted to OPSC.

Pursuant to Education Code Section 17070.54(f), the School District shall update its Master Plan to reflect any material changes in enrollment, capacity, or other areas, as appropriate for purposes of participating in the SFP. For a period of five years following the date the Master Plan was approved by the school district's governing board, the school district shall submit an updated Master Plan or a governing board resolution updating the required components of the Master Plan that were materially affected and providing a description of what changed, *only if* changes in enrollment, capacity, or other areas have materially affected components of the Master Plan required in Section 3 of this checklist.

Once five years have passed since the date of the local governing board approved a valid Master Plan previously submitted to OPSC, the School District shall submit an updated, valid Master Plan as a required component of additional applications for funding.

New

- Date the Master Plan was approved by the governing board. _____

Update due to Expiration of the Previously Submitted Master Plan

- Date the Master Plan or last update was submitted to OPSC, whichever is later. _____
- Date the updated Master Plan was approved by the governing board. _____
- Which section(s) of the Master Plan were updated? _____

Update due to Material Change in Required Components of the Previously Submitted Master Plan

- Date the Master Plan or last update was submitted to OPSC, whichever is later.

ATTACHMENT A7c

- Date the updated Master Plan or resolution pursuant to SFP Regulation Section 1859.18(b)(2) was approved by the governing board. _____
- Which section(s) of the Master Plan were updated or referenced in the governing board resolution pursuant to SFP Regulation Section 1859.18(b)(2)? _____

Verification of local governing board's approval. Submission to OPSC must include one of the following documents:

- Governing Board Resolution
- Governing Board Minutes

Section 2 – Table of Contents

The Master Plan table of contents includes all the required components listed in Section 3 of the checklist, if applicable.

Section 3 – Required Elements

The Master Plan, as required by Education Code (EC) Sections 17070.54(b), (c), and (d), must include the following information:

The Master Plan includes an estimate of eligibility for state bond funding for the following program(s) pursuant to SFP Regulation Section 1859.18(d)(1):

- New Construction Program
- Modernization Program
- Facility Hardship Program/Seismic Mitigation Program
- Charter School Facilities Program
- Career Technical Education Facilities Program
- Any Other Program Under Chapter 12.5 of the Education Code, as applicable

Page Number(s): _____

URL(s), if applicable: _____

The Master Plan includes an inventory of existing school facilities for each active/closed school site in the district, and property pursuant to Section 17070.54(d) and pursuant to SFP Regulation Section 1859.18(d)(2), which includes all of the following for each school site:

- The year each building at the school that is currently used for instructional purposes was constructed. The year constructed shall be determined in accordance with Section 1859.60.
- The square footage of each building that is currently used for instructional purposes.

ATTACHMENT A7c

STATE OF CALIFORNIA
FIVE-YEAR MASTER PLAN CHECKLIST
SCHOOL FACILITY PROGRAM
Form SAB 50-MP (NEW xx/25)

STATE ALLOCATION BOARD
OFFICE OF PUBLIC SCHOOL CONSTRUCTION

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- The year, if any, each building that is currently used for instructional purposes was last modernized with local and/or state funds.
- The pupil capacity of the school listed by grade level including Special Day Class, Non-severe and Severe pupils.
- The age, in accordance with Section 1859.60, and number of portable buildings at the school.
- Whether the school has any of the following facilities:
 - Cafeteria
 - Kitchen
 - Library
 - Multi-Purpose Room
 - Hybrid Gymnasium/Multipurpose room
 - Auditorium/Performing Arts Facility
 - Athletic Facilities, including but not limited to pools, stadiums, etc.
 - Career Technical Education Facilities such as barns, shops and outdoor student work areas

Page Number(s): _____

URL(s), if applicable: _____

- The Master Plan includes existing classroom capacity, as determined pursuant to Sections 17071.10 and 17071.25 and pursuant to SFP Regulation Section 1859.18(d)(3).

Page Number(s): _____

URL(s), if applicable: _____

- The Master Plan includes projected enrollment growth for the School District over the next five years, accounting for growth pursuant to Sections 17071.75 and 17071.76 and pursuant to SFP Regulation Section 1859.18(d)(4).

Page Number(s): _____

URL(s), if applicable: _____

- The Master Plan includes a capital planning budget outlining the School District's significant projects pursuant to SFP Regulation Section 1859.18(d)(5).

Page Number(s): _____

URL(s), if applicable: _____

- The Master Plan includes the financing and other funding sources that would be used to support the acquisition of any new school sites, new construction project(s), modernization project(s), and lead testing and remediation projects pursuant to SFP Regulation Section 1859.18(d)(6).

ATTACHMENT A7c

STATE OF CALIFORNIA
FIVE-YEAR MASTER PLAN CHECKLIST
SCHOOL FACILITY PROGRAM
Form SAB 50-MP (NEW xx/25)

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OFFICE OF PUBLIC SCHOOL CONSTRUCTION

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Page Number(s): _____ URL(s), if applicable: _____

The Master Plan includes verification of the School District's current assessed value from the county audit controller pursuant to SFP Regulation Section 1859.18(d)(7).

Page Number(s): _____ URL(s), if applicable: _____

The Master Plan includes the School District's deferred maintenance plan certified pursuant to Section 17070.75 and pursuant to SFP Regulation Section 1859.18(d)(8).

Page Number(s): _____ URL(s), if applicable: _____

The Master Plan includes a narrative explaining how the Master Plan aligns with the goals, actions, and services outlined in the School District's Local Control and Accountability Plan (LCAP) for the first state priority, as specified in paragraph (1) of subdivision (d) of Section 52060 and pursuant to SFP Regulation Section 1859.18(d)(9), as it relates to school facilities.

Page Number(s): _____ URL(s), if applicable: _____

Section 4 – Certifications and Acknowledgements

I certify, as the District Representative, that the information reported on this form is true and correct and that:

- I am an authorized representative of the district as authorized by the governing board of the School District; and
- This form is an exact duplicate (verbatim) of the form provided by OPSC. In the event a conflict should exist, then the language in OPSC's form will prevail; and,
- The School District acknowledges that the Master Plan will be audited under EC Section 41024 and understands that any non-compliance may result in the return of funding.
- The School District acknowledges that if the Master Plan is web-based, that the website must be accessible until the State Controller's Office has certified the audit pursuant to EC Section 41024 and understands that any non-compliance may result in the return of funding.

SIGNATURE OF DISTRICT REPRESENTATIVE	DATE
PLEASE PRINT NAME:	TITLE:
CONTACT NUMBER:	EMAIL ADDRESS:

ATTACHMENT A7d

OFFICE OF PUBLIC SCHOOL CONSTRUCTION STAKEHOLDER MEETING August 28, 2025

PROPOSED GUIDELINES FOR A FIVE-YEAR SCHOOL FACILITIES MASTER PLAN

PURPOSE

To discuss and receive stakeholder feedback regarding proposed guidelines resulting from Assembly Bill (AB) 247, the Kindergarten through Grade 12 Schools and Local Community College Public Education Facilities Modernization, Repair, and Safety Bond Act of 2024 (Proposition 2), which was approved by a majority of California's voters on November 5, 2024, related to the submittal of a Five-Year School Facilities Master Plan (Master Plan).

AUTHORITY

See Attachment A7a.

BACKGROUND

Proposition 2 adds Education Code (EC) Section 17070.54, which requires that school districts submit a five-year school facilities master plan, or an updated five-year school facilities master plan, approved by the governing board of the school district as a condition of participating in the School Facility Program (SFP) on or after October 31, 2024. Additionally, subdivision (d) of EC Section 17070.54 requires OPSC, in consultation with the California Department of Education (CDE), to develop guidelines that school districts may use to guide the development of the school facilities master plan.

STAFF ANALYSIS/DISCUSSION

OPSC presented at two previous stakeholder meetings on February 13, 2025 and April 10, 2025, related to the statutory requirements of the Master Plan.

This portion of the report is a follow-up to these meetings and contains a draft of the guidelines document required by the statute (Attachment A7e) to assist school districts with the planning and development of a compliant and beneficial Master Plan. The proposed regulatory amendments and forms are covered in a separate report.

In consultation with CDE and the Division of the State Architect (DSA), and aided by stakeholder input, OPSC has created a preliminary draft of School Facility Program Guidelines for the Five-Year School Facilities Master Plan (Guidelines). A summary of the Guidelines is presented below for stakeholder review and further feedback.

School Facility Program Guidelines for the Five-Year School Facilities Master Plan

The drafted Guidelines have been prepared as a tool that offers recommendations and best practices to aid school districts in the development of their Master Plan. The information presented in the Guidelines is meant to provide a general framework and is not intended to be prescriptive, unless a particular component is required by statute.

STAFF ANALYSIS/DISCUSSION (cont.)

The Guidelines have been divided into four chapters: Chapter 1 - Overview, Chapter 2 - Statutory Requirements, Chapter 3 - Cost Reduction Tools, and Chapter 4 - Other Considerations. Each chapter presents a high-level overview of key components required and other considerations in the development of the Master Plan.

Chapter 1: An Overview of School Facility Program Guidelines for the Five-Year School Facilities Master Plan

This chapter provides background information on the inception of Master Plan requirement, defines terms, and provides direction for submittal requirements. Additionally, this section outlines submittal timelines for the various programs under the SFP, according to application type and submittal date, as this will vary by project.

Chapter 2: Statutory Requirements

Chapter 2 is the lengthiest of the three sections as it breaks down each of the required components of EC Section 17070.54 in detail and identifies recommended practices for meeting the statutory requirements of the Master Plan. Where applicable, it offers resources or examples of how to present the school district's data effectively. Pursuant to statute and regulations (as proposed), the following components must be included for a complete Master Plan:

- Must be a Five-Year, or updated Five-Year School Facilities Master Plan with at least four years remaining on the term of the plan
- Information on the school district's eligibility for state bond funding under the School Facility Program
- An inventory of existing facilities, sites, and property pursuant to EC Section 17070.54(d)
- Existing classroom capacity, as determined pursuant to EC Sections 17071.10 and 17071.25
- Projected enrollment growth for the school district over the next five years, accounting for growth pursuant to EC Sections 17071.75 and 17071.76
- A capital planning budget outlining the school district's projects
- The financing and other funding sources that would be used to support the acquisition of a school site, new construction projects, modernization projects, and lead testing and remediation projects
- Verification of the school district's current assessed value from the appropriate local government entity that collects and maintains this information.
- The school district's deferred maintenance plan certified pursuant to Section 17070.75
- A narrative describing how the school facilities master plan is consistent with the goals, actions, and services identified in the school district's local control and accountability plan (LCAP) for the first state priority, as described in paragraph (1) of subdivision (d) of Section 52060, as it relates to school facilities

These elements are required by EC Section 17070.54 without exception and are included as part of the proposed SFP regulatory amendments. However, the Guidelines allow for their presentation in a Master Plan to vary based on a school district's formatting and organization preferences for the Master Plan.

STAFF ANALYSIS/DISCUSSION (cont.)*Chapter 3: Cost Reduction Tools*

This chapter identifies some of the key areas and processes that impact the cost of construction and provides suggestions of how to achieve measurable cost savings. The concepts presented in this chapter are intended to assist school districts in creating a Master Plan that aligns with their budgetary goals. An overview of the following considerations is included throughout the chapter:

- District Responsibilities
- Joint Use Facilities
- Site Issues
- Professional Consultants
- Contractors
- Agencies
- Types of Construction
- Prototypes
- Project Delivery

Chapter 4: Other Considerations

This chapter explores additional factors that school districts may consider when developing facilities plans to support the school district's goals and best serve its community. The following recommendations were provided based on input from CDE, DSA, and numerous stakeholders that provided feedback during the implementation of Proposition 2.

- Seismic Safety: A school district can conduct a seismic evaluation of the existing facilities to inform the long-term strategies outlined in its Master Plan. Seismic safety considerations extend the useful life of the building and protect the facilities' occupants.
- Sustainability: Sustainability and environmental impact are important considerations in school facilities planning and can be addressed in the development of a Master Plan. School districts can incorporate these considerations by evaluating energy efficiency, using renewable energy options, selecting environmentally responsible materials, and considering long-term environmental impacts in their planning and decision-making processes.
- Facility Inspection Tool (FIT) Findings: Although the completed FIT form is not submitted to OPSC, findings from the FIT can also inform the development of a Master Plan in multiple ways. School districts can address or embed their findings as part of their Master Plan. The findings can provide a starting point for school districts to determine priorities for future funding projects. By performing a walk-through of their school sites and identifying any deficiencies, school districts may begin planning for future expenses as they relate to maintaining good repair of their facilities or any other visionary projects.
- Education Specifications: "Ed Specs" can inform many components of the Master Plan and district priorities. Conversely, Ed Specs may rely on the data presented in the Master Plan. It may be beneficial to develop both the Master Plan and Ed Specs in tandem to ensure the district's overall goals and site-specific visions are aligned.

STAFF ANALYSIS/DISCUSSION (cont.)

- Artificial Intelligence (AI)-Driven Educational Planning and Reporting Tools: To the extent their use is permitted by individual school districts, school districts may consider exploring the use of AI-driven platforms designed for educational planning and facilities reporting, in the development of their Master Plan.

Next Steps

OPSC welcomes any additional feedback on the contents and format of the Guidelines.

To enrich the lives of California's school children as stewards of the taxpayers' commitment to education.

School Facility Program Guidelines for the Five-Year School Facilities Master Plan

A guide to assist school districts in developing a Five-Year School Facilities Master Plan as a condition of participating in the School Facilities Program.

Prepared by the
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Chapter 1: An Overview of School Facility Program Guidelines for the Five-Year School Facilities Master Plan

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Introduction

The Kindergarten through Grade 12 Schools and Local Community College Public Education Facilities Modernization, Repair, and Safety Bond Act of 2024 (Proposition 2) requires that, as a condition of participating in the School Facility Program (SFP), for applications received on or after October 31, 2024, school districts and county offices of education (COE)¹ must submit to the Office of Public School Construction (OPSC) a Five-Year School Facilities Master Plan (Master Plan), or an updated Master Plan, approved by the governing board of the school district.

This guidebook was created by OPSC, in consultation with the California Department of Education (CDE), to support school districts in the development of Master Plans that are inclusive of all statutory requirements. While this guide offers recommendations and considerations to inform your planning, it is not intended to be prescriptive. School districts are encouraged to develop facilities plans that align with their unique goals, challenges and community needs. OPSC aims to provide a model that offers structure, practical insights, and helpful tools based on best practices in educational planning and facility management. However, each school district operates within its own context, and may wish to adapt, expand upon, or diverge from the recommendations provided that extend beyond the elements that are statutorily required to be included in the Master Plan.

Throughout this guide, you will find icons alongside the text to help you differentiate between a statutory requirement or a suggestion.



This icon appears when a component is required by Education Code Section 17070.54.



This icon appears for any recommended, environmentally conscientious planning strategies.



This icon appears for any other helpful hints from OPSC.

OPSC is here to help you meet the applicable statutory requirements. The school district is responsible for developing a Master Plan that fits the specific needs of its schools and community. Ultimately, the purpose of this resource is to serve as a starting point that empowers school districts to create a facilities plan that works best for each district.

¹ References to a “school district” in this guidebook should generally be considered applicable to school districts and county offices of education.

What is the Five-Year School Facilities Master Plan?

The California Department of Education (CDE) defines a long-range facilities plan as:

A compilation of information, policies, and statistical data about a school district. It is organized to provide (1) a continuous basis for planning educational facilities that will meet the changing needs of a community; and (2) alternatives in allocating facility resources to achieve the school district's goals and objectives. It is used for planning facilities needs for either pupil enrollment growth or decline.

By developing long-range facilities plans, school districts are enabled to:

1. Gather and organize factual information about a community from which present and future educational program needs can be determined.
2. Estimate pupil population as to numbers, ages, socioeconomic backgrounds, and ethnic composition so that facilities may be planned for and provided.
3. Make an objective appraisal of the quality and capacity of existing school facilities.
4. Make more effective decisions regarding the types, amounts, and quality of new and existing school facilities and the disposition of facilities during periods of declining enrollment.
5. Coordinate a program of total school and community planning.
6. Develop a system of educational program and facilities priorities as an integral part of the educational process.
7. Maintain a program of continuous comprehensive planning and financing of school facilities.²

Proposition 2 adds Education Code (EC) Section 17070.54, which requires that school districts submit a five-year school facilities Master Plan, or an updated five-year school facilities Master Plan, approved by the governing board of the school district as a condition of participating in the SFP on or after October 31, 2024.

In summary, Proposition 2 requires the following:

- School districts must include specified minimum elements as part of the required five-year school facilities master plan, including an inventory of existing facilities, sites, and property.
- OPSC must develop guidelines, in consultation with CDE, that school districts may use to guide the development of the school facilities master plan.
- OPSC must develop guidelines or standards, in consultation with CDE, that school districts must use to develop and submit the inventory of existing facilities, sites, and property, which must include specified elements.
- The State Controller's Office (SCO) must include instructions in the K-12 Audit Guide to verify that all required components are reflected in participating school districts' school facilities master plans.
- School districts must update their school facilities master plans to reflect any changes in enrollment, capacity, or other areas, as appropriate for purposes of participating in the SFP.

² [Guide to Development of Long Range Facilities Plan - School Facility Design \(CA Dept of Education\)](#)

For the entirety of EC Section 17070.54, please refer to page 39 of the Appendix.

Who must submit it?

EC Section 17070.54 requires the submittal of a Five-Year School Facilities Master Plan as a condition of participating in the SFP. Therefore, any school district or county office of education that submits an application for funding under the SFP (New Construction, Modernization, Small School District Program [SSDP], Charter School Facilities Program [CSFP], Career Technical Education Facilities [CTEFP]³, and/or Facility Hardship/Seismic Mitigation programs), must submit a Master Plan. However, Joint Powers Authorities (JPA) and independent Charter Schools are exempt from this requirement as these entities are not considered school districts⁴.

Additionally, a Master Plan submittal is not required for stand-alone eligibility applications. School districts are encouraged to submit eligibility adjustments when their enrollment increases for Modernization but are advised they may not be processed until a funding application is received.

Timelines for Submittal

Proposition 2 requires submittal of a five-year school facilities Master Plan with specified elements as a condition of SFP participation, but it does not specify when the required Master Plan must be submitted. At the December 3, 2024 meeting, the State Allocation Board (SAB) adopted policies for initial implementation of Proposition 2 that relate to the timing of the submittal of the Master Plan to OPSC, dependent on the submittal date and project type. These policies facilitate continuous submittal of SFP applications during implementation of Proposition 2. SFP Regulation Section 1859.70.5 further clarifies the submittal requirements for the Master Plan and an overview follows:

Facility Hardship Program and Seismic Mitigation Program Applications

- Under existing SFP Regulations, applications for Facility Hardship and the Seismic Mitigation Program receive first priority for processing and presentation to the Board for funding consideration. Facility Hardship and Seismic Mitigation Program applications submitted on or after October 31, 2024 are subject to the Proposition 2 requirement to submit a Master Plan.
- Accordingly, to allow submittal, processing, and approval of these applications without delay, submittal of the Master Plan will be required by the time the school district's Substantial Progress certification for construction of the project is due (18 months after fund release), or by the time of submittal of the 100 percent complete *Expenditure Report* (Form SAB 50-06), whichever occurs first.
- OPSC contacted all school districts that submitted applications between October 31, 2024 and December 3, 2024 to request a governing board resolution acknowledging the requirement to submit the Master Plan by the previously mentioned deadline. The governing board resolution also had to acknowledge

³ SSDP, CSFP and CTE applications are only required to submit a Master Plan if their project is funded. See additional details in "Timelines for Submittal"

the project may be rescinded for failure to submit a Master Plan with the required components. These school districts were provided 60 days to submit the resolution to OPSC.

- Applications submitted on or after December 4, 2024 are required to include a governing board resolution acknowledging the requirement to submit the Master Plan by the previously mentioned deadline. The governing board resolution must also acknowledge the project may be rescinded for failure to submit a Master Plan with the required components. OPSC provides applicants who submit an application without the resolution a corrective “24-hour letter” to request submittal of the resolution to OPSC within 24 hours or the application is returned to the applicant.

Facility Hardship Program and Seismic Mitigation Program Applications			
Date of Application Submittal	Is Master Plan required?	When is a Board Resolution Required?	When is Master Plan required?
On or before October 30, 2024	No	N/A	N/A
October 31, 2024 through December 3, 2024	Yes	Within 60 days of OPSC notification	By the time of Substantial Progress certification or with the 100% Complete Form SAB 50-06, whichever occurs first
On or after December 4, 2024	Yes	At the time of application submittal	By the time of Substantial Progress certification or with the 100% Complete Form SAB 50-06, whichever occurs first

New Construction and Modernization Program Applications

- OPSC contacted all school districts that submitted applications between October 31, 2024 and December 3, 2024 to request a governing board resolution acknowledging the requirement to submit the Master Plan at the time the application is processed by OPSC. The governing board resolution also had to acknowledge the project may be rescinded for failure to submit a master plan with the required components. These school districts were provided 60 days to submit the resolution to OPSC.
- Applications received on December 4, 2024 through 12 months following Office of Administrative Law (OAL) approval of regulations implementing these policies are required to submit a governing board resolution acknowledging the requirement to submit the Master Plan by the time the application is processed by OPSC. The governing board resolution must also acknowledge the project may be rescinded for failure to submit a Master Plan with the required components. OPSC provides applicants who submit an application without the resolution a corrective “24-hour letter” to request submittal of the resolution to OPSC within 24 hours or the application is returned to the applicant.
- Applications received more than 12 months following OAL’s approval of regulations implementing these policies will be required to submit the Master Plan at the time the application is submitted to OPSC. Applications submitted without the master plan will be provided a corrective “24-hour letter” to request

submittal of the Master Plan to OPSC within 24 hours or the application will be returned to the applicant.

New Construction and Modernization Applications			
Date of Application Submittal	Is Master Plan required?	When is a Board Resolution Required?	When is Master Plan required?
On or before October 30, 2024	No	N/A	N/A
October 31, 2024 through December 3, 2024	Yes	Within 60 days of OPSC notification	Within 90 days of notification of application processing
December 4, 2024 through 12 months following OAL regulation approval	Yes	At the time of application submittal	Within 90 days of notification of application processing
>12 months following OAL regulation approval	Yes	N/A	At the time of application submittal

Career Technical Education Facilities Program Applications

- For CTEFP applications, submittal of the Master Plan will be required by the time the school district's Substantial Progress certification for construction of the project is due (18 months after fund release), or by the time of submittal of the 100 percent complete Form SAB 50-06, whichever occurs first.

Charter School Facilities Program Applications

- For CSFP projects that previously received a Preliminary Apportionment but had not submitted an *Application for Funding* (Form SAB 50-04) to request a Final Apportionment on or before October 30, 2024, OPSC proposes that submittal of the Master Plan will be required by the time the school district's Substantial Progress certification for construction of the project is due (18 months after fund release), or by the time of submittal of the 100 percent complete Form SAB 50-06, whichever occurs first.
- For CSFP projects receiving a preliminary apportionment on or after October 31, 2024 (funded under the 2025 filing round and beyond), OPSC proposes that submittal of the Master Plan will be required at the time the Final Apportionment application is submitted to OPSC via the *Application for Funding* (Form SAB 50-04). Applications submitted without the Master Plan will be provided a corrective "24-hour letter" to request submittal of the master plan to OPSC within 24 hours or the application will be returned to the applicant.

Small School District Program Applications

- For SSDP Applications, OPSC proposes that submittal of the Master Plan will be required at the time the Final Apportionment application is submitted to OPSC via the *Application for Funding* (Form SAB 50-04). Applications submitted without the Master Plan will be provided a corrective “24-hour letter” to request submittal of the master plan to OPSC within 24 hours or the application will be returned to the applicant.

(Final due dates are subject to final OAL-approved SFP Program Regulations)

Natural Disaster Assistance Program Applications

- For Natural Disaster Assistance Applications, submittal of the Master Plan will be required by the time of submittal of the 100 percent complete Form SAB 50-06.

For school districts required to submit a governing board resolution acknowledging the requirement to submit the Master Plan, sample resolutions can be found here: [School Facility Master Plans](#).

Submittal Guidelines

OPSC acknowledges that many school districts may have existing Master Plans that were developed in various formats. OPSC provides flexibility to allow school districts to develop the Master Plan in a method that suits their purposes beyond the SFP submittal requirements, provided each of the components of the Master Plan required by EC Section 17070.54 is included in the submittal. OPSC also aims to create an interface in OPSC Online that will enable school districts to upload their Master Plans and any supplements, addenda, or updates to existing or previously submitted Master Plans. At present, OPSC has identified two main formats for submission - pdf or direct linking to websites.

Master Plan as a PDF Document

School districts may elect to submit their Master Plans in a traditional pdf format. These documents must include a completed *Five-Year Master Plan Checklist* (Form SAB 50-MP). The final document must be uploaded to the school district’s “District” tab in OPSC Online.

Master Plan as an External Link

School districts that utilize their district website to present their Master Plan are welcome to provide the applicable Uniform Resource Locator (URL) link/s to OPSC. This will be captured on the *Five-Year Master Plan Checklist* (Form SAB 50-MP) that outlines the required elements of the Master Plan and has fields for collecting the corresponding links, as shown below. Please note that the site plan/map shall be downloadable as a pdf from the URL link site.

Figure 1- Excerpt from Form SAB 50-MP**Section 3 – Required Elements**

The Master Plan, as required by Education Code (EC) Sections 17070.54(b), (c), and (d), must include the following information:

The Master Plan includes an estimate of eligibility for state bond funding for the following program(s) pursuant to SFP Regulation Section 1859.18(d)(1):

- New Construction Program
- Modernization Program
- Facility Hardship Program/Seismic Mitigation Program
- Charter School Facilities Program
- Career Technical Education Facilities Program
- Any Other Program Under Chapter 12.5 of the Education Code, as applicable

Page Number(s): _____

URL(s), if applicable: _____

The Master Plan includes an inventory of existing school facilities for each active/closed school site in the district, and property pursuant to Section 17070.54(d) and pursuant to SFP Regulation Section 1859.18(d)(2), which includes all of the following for each school site:

- The year each building at the school that is currently used for instructional purposes was constructed. The year constructed shall be reported in accordance with Section 1859.60.
- The square footage of each building that is currently used for instructional purposes.
- The year, if any, each building that is currently used for instructional purposes was last modernized with local and/or state funds.
- The pupil capacity of the school listed by grade level including Special Day Class, Non-severe and Severe pupils.
- The age, in accordance with Section 1859.60, and number of portable buildings at the school.

Whether the school has any of the following facilities:

- Cafeteria
- Kitchen
- Library
- Multi-Purpose Room
- Hybrid Gymnasium/Multipurpose room
- Auditorium/Performing Arts Facility
- Athletic Facilities, including but not limited to pools, stadiums, etc.
- Career Technical Education Facilities such as barns, shops and outdoor student work areas

Page Number(s): _____

URL(s), if applicable: _____

Future enhancements to OPSC Online will include a page that enables a school district to input the individual URLs of their Master Plan components directly to their school district profile. However, school districts are advised that any information submitted as a URL must remain continuously valid and available from the time the Master Plan is submitted through SCO certification of the project audit and closeout. Alternatively, a district could provide extracted files from the webpage that include the necessary information.

Chapter 2: Statutory Requirements

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Introduction

This chapter outlines each of the statutorily required components of a Master Plan for participation in the SFP. Each section examines the required elements in greater detail, highlights practical considerations and offers guidance on how to integrate these components into the school district's local planning processes. This chapter provides a variety of examples and tips for compiling the necessary information in a clear and accessible format.

Defining Terms

This guidebook features terminology that may be subject to varying interpretations. Unless otherwise specified, all terms are to be understood as defined by Education Code (EC) or SFP Regulations. These definitions are generally found in EC Section 17070.15 and Section 1859.2 of Title 2 of the California Code of Regulations.

OPSC understands that school districts' Master Plans will reflect the specific needs of their communities and that there may be instances in which OPSC's definitions do not align with the school district's. Where such differences occur, a footnote may be provided for clarification.

For example, the Master Plan's inventory must include the last year that each building currently used for instructional purposes by the district was modernized. Modernization includes any work school districts performed, with or without SFP funding applications for modernization funding. School districts that want to track their locally funded modernization projects should include this information in their Master Plans. School districts should consider noting the source of funding for all modernization work.

Five-Year Requirement

Subdivisions (a) and (f) of EC Section 17070.54 state:

(a) As a condition of participating in the school facilities program, a school district shall submit to the department a five-year school facilities master plan, or updated five-year school facilities master plan, approved by the governing board of the school district.

...

(f) The school district shall update its school facilities master plan to reflect any changes in enrollment, capacity, or other areas, as appropriate for purposes of participating in the school facilities program.

The overarching requirement of the Master Plan is that it be a five-year facilities plan. Therefore, when the Master Plan is submitted, SFP Regulations require that the date of the local governing board's approval of the Master Plan is no more than five years earlier than the applicable deadline for submittal of the Master Plan to OPSC for the type of the associated application for funding (see Chapter 1, Timelines for Submittal).

For a period of five years following the date of local governing board approval of a Master Plan determined by OPSC to be valid, the school district may submit additional applications for funding to OPSC without resubmitting the previous, valid Master Plan, unless otherwise required. Specifically, OPSC will only require an update to a school district's previously submitted, valid Master Plan during the five years immediately following the governing board's approval of that Master Plan if changes in enrollment, capacity, or other areas have materially affected components of the Master Plan that are required by statute within that timeframe and

the school district wishes to submit an additional application for funding. To provide flexibility in the event such an update is required within the five-year period, in lieu of a fully updated Master Plan, the school district can provide a governing board resolution updating the components of the Master Plan that are statutorily required and were materially affected since the local governing board's approval of the Master Plan, along with a description of the changes.

The date of the most recent Master Plan adopted by the applicant's governing board should be used as the date from which to measure when a new, or updated Master Plan is submitted. For example, if an application with a valid five-year Master Plan was adopted by the local school governing board on April 15, 2026, that plan could be submitted with any applications submitted until April 15, 2031, provided there are no changes materially affecting one or more statutorily required components of the district's latest Master Plan during that timeframe.

School districts that are less active in the SFP and do not submit new applications every year would only be required to submit a Master Plan upon participation in the SFP. School districts that frequently submit applications to OPSC would only need to submit an updated Master Plan once every five years, and at intervening times if the district experiences changes that materially affect one or more components of the district's latest Master Plan that are statutorily required.

School District Eligibility

Subdivision (b) of EC Section 17070.54 states: The school facilities master plan...shall include information on the school district's eligibility for state bond funding pursuant to this chapter.

OPSC currently maintains information on school districts' "eligibility for state bond funding" under the SFP by capturing submitted and SAB-approved New Construction and Modernization program eligibility applications and adjustments in the OPSC Online database. In developing the Master Plan, school districts shall consider existing SFP eligibility, as well as potential SFP program eligibility.

For the purposes of meeting statutory requirements, a school district must submit a narrative that speaks to its existing and future eligibility. The narrative may address the following questions:

- For the New Construction Program, the School District must provide a narrative which includes the School District's existing New Construction eligibility approved by the SAB or potential for New Construction eligibility based on enrollment trends in the School District. The narrative may include the estimated dollar value of potential funding based on the current per-unhoused-pupil grant amount as provided by Education Code Section 17072.10(a) and SFP Regulation Sections 1859.71 and 1859.71.1.
- For the Modernization Program, the School District must provide a narrative or list of the School District's existing Modernization eligibility approved by the SAB or potential for Modernization eligibility for each school site. The narrative may include the estimated dollar value of the eligibility based on the current pupil grant amount as provided by Education Code Section 17074.10(a) and SFP Regulation Sections 1859.78 and 1859.78.3.
- For the Facility Hardship Program and Seismic Mitigation Program the School District must provide a narrative describing the School District's existing conceptual, unfunded, or funded projects approved by the SAB or potential future projects. The narrative shall include the estimated total project cost to mitigate the health and safety threat as defined

by Regulation Sections 1859.82.1 and 1859.82.2.

- For the Charter School Facilities Program the School District must provide a narrative describing the School District's existing Charter School Facilities Program Preliminary Apportionments approved by the SAB or potential for future applications to the Charter School Facilities Program. The narrative may include the estimated total project cost based on Regulation Sections 1859.163.1 and 1859.163.5, respectively. If bond authority for this program is exhausted, this narrative is not required.
- For the Career Technical Education Facilities Program the School District must provide a narrative describing the School District's existing Career Technical Education Facilities Program Apportionments approved by the SAB, or the potential for future applications to the on Career Technical Education Facilities Program. The narrative may include the estimated total project cost pursuant to Regulation Section 1859.193. If the School District does not operate a comprehensive high school or bond authority for this program is exhausted, the narrative is not subject to this requirement.
- Provide a narrative describing the School District's eligibility and potential funding for state bond funding pursuant to any other program under Chapter 12.5.

School districts may find tables and charts useful for conveying this information. Additionally, the projected enrollment and financing sections of this guidebook provide additional considerations to inform the eligibility narrative.

OPSC encourages school districts to reach out to their assigned OPSC Project Manager who can assist in determining the district's potential eligibility for state bond funding.

District-wide Inventory

Subdivision (c) of EC Section 17070.54 states: The school facilities master plan shall include, but is not limited to, all of the following information: (1) An inventory of existing facilities, sites, and property pursuant to subdivision (d)...

Statute requires the Master Plan to include an inventory of existing facilities, site, and property. This inventory shall include the following for every school in the district:

- The year each building at the school that is currently used for instructional purposes was constructed along with the original DSA application number of initial construction.
- The square footage of each building that is currently used for instructional purposes.
- The year each building that is currently used for instructional purposes was last modernized, if applicable.
- The pupil capacity of the school.
- The age and number of portable buildings at the school.
- Whether the school has any of the following:
 - A cafeteria
 - A multipurpose room
 - A library
 - A gymnasium
 - A hybrid gym/multipurpose room

When creating a site inventory, school districts shall identify each building, its square footage,

and year of construction and modernization⁵ (if applicable). For portable buildings, the age is determined by the year it was placed onsite⁶.

OPSC also recommends including:

- A graphical image site plan/map showing all existing facilities that includes unique building identifiers (number, letter, etc) and their use (classroom, library, etc).
- Unique building numbers for a site, indicated on the site plan/map, once CDE/DSA/OPSC have established them.

School districts likely already possess documents containing some of the requested information and are encouraged to utilize those existing resources. The [Form SAB 50-02 Existing School Building Capacity](#) will be helpful for determining pupil and classroom capacity at the school site. This form may provide a starting point for determining the facilities in the district at the time the Form SAB 50-02 was submitted. However, school districts will need to ensure the facilities inventory is current at the time the Master Plan is approved by the local governing board.

Example 1 demonstrates a single school elementary school district with 34 permanent classrooms and 4 portable classrooms. The school site has a hybrid Multipurpose Room and Library in Building 120. The school district submitted a site map and accompanying chart that provides a basic inventory (Table A) containing all required elements of subdivision (d) of EC Section 17070.54.

⁵ In the SFP modernization program, age of buildings is one year after DSA approval date

⁶ A footnote could be included if the portable buildings were previously stockpiled or relocated from other sites

Example 1- OPSC Elementary School Site Map

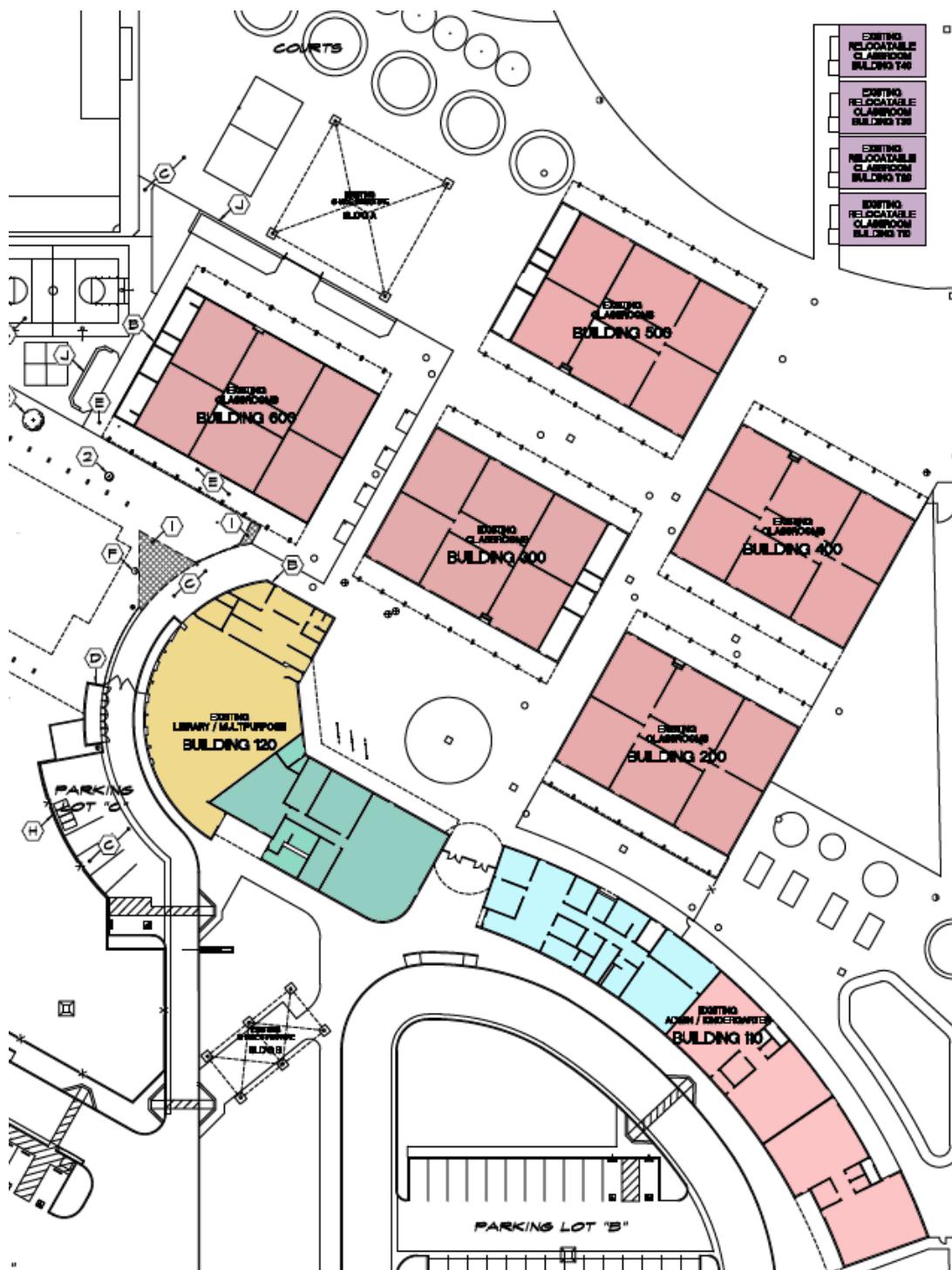


Table A

OPSC Elementary School									
Total Classroom Count: 38 Total Pupil Capacity: 950									
Building Name	Facility Use	Square Footage	DSA Application #	Project Tracking Number (PTN)	Building ID ⁷	Year of Construction	Year of Modernization	Portable? Y/N	Classroom Count
Building 110	Administration and Kindergarten Wing	7,180	02-123456	N/A	98-76543-2136915-0001	1972	2012	N	4
Building 120	Multipurpose Room/ Library Hybrid	6,000	02-123456	N/A	98-76543-2136915-0002	1972	2012	N	0
Building 200	Classrooms	5,760	02-123456	N/A	98-76543-2136915-0003	1972	2012	N	6
Building 300	Classrooms	5,760	02-678910	76543-5	98-76543-3471123-0001	2003	N/A	N	6
Building 400	Classrooms	5,760	02-678910	76543-5	98-76543-3471123-0002	2003	N/A	N	6
Building 500	Classrooms	5,760	02-678910	76543-5	98-76543-3471123-0003	2003	N/A	N	6
Building 600	Classrooms	5,760	02-678910	76543-5	98-76543-3471123-0004	2003	N/A	N	6
Building T10	Relocatable Classroom	960	02-112233	76543-2	98-76543-5167134-0001	1999	N/A	Y	1
Building T20	Relocatable Classroom	960	02-112233	76543-2	98-76543-5167134-0002	1999	N/A	Y	1
Building T30	Relocatable Classroom	960	02-112233	76543-2	98-76543-5167134-0003	1999	N/A	Y	1
Building T40	Relocatable Classroom	960	02-112233	76543-2	98-76543-5167134-0004	1999	N/A	Y	1

 Those who are familiar with the Facility Hardship Program/Seismic Mitigation Program (FHP/SMP) may have experience compiling a site inventory for the purposes of determining replacement eligibility for square footage funding based on facility type. These application submittals often include both A1 type diagrams and a corresponding Excel spreadsheet that lists all facilities on the school site and their existing square footage. Such documents can be updated for the purpose of fulfilling the site inventory component of the Master Plan.

Additionally, a school district may elect to create an inventory that serves a dual purpose in the event of a facility hardship application submittal. In this case, the school district's inventory would include a more detailed breakdown of the square footages for each facility type listed in Table B below, pursuant to SFP Regulation Section 1859.82.1. Table C is an example of how to incorporate this data into the template provided in Table A above.

⁷ CDE/DSA/OPSC are currently developing a standardized numbering system for tracking school buildings

Table B

Facility Type	Elementary School Pupils	Middle School Pupils	High School Pupils
Multi-Purpose (includes food service)	5.3 sq. ft. per pupil minimum 4,000 sq. ft.	5.3 sq. ft. per pupil minimum 5,000 sq. ft.	6.3 sq. ft. per pupil minimum 8,200 sq. ft.
Toilet	3 sq. ft. per pupil minimum 300 sq. ft.	4 sq. ft. per pupil minimum 300 sq. ft.	5 sq. ft. per pupil minimum 300 sq. ft.
Gymnasium (includes shower/locker area)	N/A	12.9 sq. ft. per pupil minimum 6,828 sq. ft. maximum 16,000 sq. ft.	15.3 sq. ft. per pupil minimum 8,380 sq. ft. maximum 18,000 sq. ft.
School Administration	3 sq. ft. per pupil minimum 600 sq. ft.	3 sq. ft. per pupil minimum 600 sq. ft.	4 sq. ft. per pupil minimum 800 sq. ft.
Library/Media Center	2.3 sq. ft. per pupil plus 600 sq. ft., minimum 960 sq. ft.	3.3 sq. ft. per pupil plus 600 sq. ft. minimum 960 sq. ft.	4.3 sq. ft. per pupil plus 600 sq. ft. minimum 960 sq. ft.
Kindergarten Classrooms (including Transitional Kindergarten)	1,350 sq. ft. for each replacement classroom.	NA	NA
Classrooms (1 st -12 th grade)	960 sq. ft. for each replacement classroom	960 sq. ft. for each replacement classroom	960 sq. ft. for each replacement classroom
Computer instructional support area, Industrial and Technology/Education Laboratory	960 sq. ft. for each replacement classroom.	960 sq. ft. for each replacement classroom.	960 sq. ft. for each replacement classroom.
Laboratory Classrooms (including science and consumer home economics. (Does not include Industrial and Technology/Education Laboratory)	1,300 sq. ft. for each replacement classroom.	1,300 sq. ft. for each replacement classroom.	1,300 sq. ft. for each replacement classroom.

Table C

OPSC Elementary School						
Total Classroom Count: 38						
Total Pupil Capacity: 950						
Building Name	Facility Use	Square Footage	DSA Application #	Project Tracking Number (PTN)	Building ID #	Year of Construction
Building 110	Administration and Kindergarten Wing	7,180	02-123456	N/A		1972
Square Footage Break Out		Room Name	Facility Type	Square Footage by Room		
		Kindergarten 1	Kinder CR	1,290		
		Kindergarten 2	Kinder CR	1,290		
		Kindergarten 3	Kinder CR	1,290		
		Kindergarten 4	Kinder CR	1,290		
		Kindergarten Restroom 1	Toilet	90		
		Kindergarten Restroom 2	Toilet	90		
		Main Office	Administration	960		

	Teacher's Lounge	Administration	700	
	Storage Closet	Other	55	
	Staff Restroom	Toilet	125	

 The Education Code requires a district-wide inventory. Although the school district may break out the inventory by site, the Master Plan must be inclusive of all schools within the district, regardless of which school site is associated with their SFP application at the time of submittal.

Existing Classroom Capacity

Subdivision (c) of EC Section 17070.54 states: The school facilities master plan shall include, but is not limited to, all of the following information: ... (2) Existing classroom capacity, as determined pursuant to Sections 17071.10 and 17071.25...

Statute requires the Master Plan to include the existing classroom capacity. Though not required, many of the forms used to establish and/or adjust eligibility for either new construction or modernization funding can be used as a starting point for obtaining this information. . Both the *Existing School Building Capacity* (Form SAB 50-02), which is districtwide, and the *Eligibility Determination* (Form SAB 50-03), which is site-specific, can be used to obtain information on the facilities as they existed when those forms were submitted to OPSC. The school district can then use that information to develop their Master Plan. Additionally, OPSC often receives site-specific summaries that include building names, square footage, age, and use of each space. Those documents could also be used to examine the site as it was when the document was submitted and then amended for current information.

 Under the SFP, any classroom that, pursuant to EC Section 17071.25(a)(1), was constructed or reconstructed to serve as an area in which to provide pupil instruction (with a few exceptions) and is at least 700 square feet is considered a classroom. This includes standard classrooms, shops, science laboratories and computer laboratories/classrooms.

To determine classroom capacity in the SFP, school districts utilize the Gross Classroom Inventory (GCI) methodology for identifying classrooms, as outlined in SFP Regulation Section 1859.31. This list is inclusive of any classroom:

- for which a contract was signed for the construction or acquisition of facilities or for which construction work has commenced at the time the SFP application for determination of eligibility is submitted to the OPSC;
- constructed with funds from the Lease-Purchase Program (LPP);
- used for Special Day Class or Resource Specialist Programs;
- that are standard classrooms, shops, science laboratories, computer laboratories, or computer classrooms;
- acquired or created for Class Size Reduction purposes;
- used for preschool programs;
- converted to any non-classroom purpose including use by others;
- with Housing and Community Development or Department of Housing insignia;
- acquired for interim housing for a modernization project;
- leased or purchased under the State Relocatable Program pursuant to Chapter 14 of Part 10 of the Education Code;

- that have a waiver for continued use by the Board for Field Act exemptions;
- used for Community School purposes;
- included in a closed school.

Section 1859.32 then goes on to outline which classrooms may be excluded from the count above. The GCI calculated above will be reduced by any classrooms that fall under the following categories:

- abandoned and approved for replacement as a hardship under the provisions of the LPP;
- at a school operated on a year-round schedule that has been used continuously for at least 50 percent of the time for preschool programs in the five years preceding the receipt of the application for determination of eligibility;
- included in any new construction LPP project that has not received a Phase C apportionment;
- that is portable and owned or leased by the district for 20 years or more that was approved for abandonment in a LPP project and the plans for the project had Division of the State Architect (DSA) approval prior to November 4, 1998;
- that is a trailer and is transported/towed on its own wheels and axles;
- used exclusively for regional occupational centers, regional occupational programs, childcare, preschool and/or Adult Education Programs, and was built or acquired with funds specifically available for those purposes;
- of less than 700 interior square feet;
- originally built for instructional use, but converted to one of the following:
 - (1) used continuously for school administration for at least five years prior to the submittal of the application to the OPSC for determination of eligibility.
 - (2) used continuously for central or main district administration for at least five years prior to the submittal of the application to the OPSC for determination of eligibility.
 - (3) used for school library purposes during the previous school year.
- owned but leased to another district.
- any portable classroom excluded by Education Code Section 17071.30.
- that is permanent space and leased for less than five years.
- any permanent classroom contained in a project for which the construction contract was signed between August 27, 1998 and November 18, 1998 and for which the district did not have full project eligibility under the SFP.
- that was acquired with joint-use funds specifically available for that purpose.

Multiplying the GCI by the state loading standard determines the school district's existing pupil capacity. State loading standards for classrooms are as follows:

K-6	7-8	Non-Severe Special Day Class	Severe Special Day Class
25 pupils	27 pupils	13 pupils	9 pupils

School districts can use the GCI methodology and state loading standards described above as a means of determining the existing classroom capacity and pupil capacity of schools required as part of the inventory of existing facilities, sites, and property. Alternatively, school districts could choose their own format that tracks capacity consistent with the SFP. They may also

include more detail than is required by statute for determining capacity.

The total classroom and pupil capacity can be presented together as part of the inventory required by subdivision (c)(1) of EC Section 17070.54.

Projected Enrollment

Subdivision (c) of EC Section 17070.54 states: The school facilities master plan shall include, but is not limited to, all of the following information: ... (3) Projected enrollment growth for the applicable school district over the next five years, accounting for growth pursuant to Sections 17071.75 and 17071.76...

Statute requires the Master Plan to include projected enrollment growth information over the five years after the Master Plan submittal. The School Facility Program's *Enrollment Certification/Projection* (Form SAB 50-01) can be used for this purpose, part or in whole, depending on whether the application submittal coincides with the same enrollment reporting year as the latest Form SAB 50-01. The form requires at least the current and three previous years of enrollment data to perform the projection. The applicant can take the data submitted on a current or previous Form SAB 50-01 and use that information to determine its five-year projected enrollment.

For example, if a school district wished to calculate the projected enrollment in 29/30, five years from now (24/25), they would input 24/25 as the current year and provide the enrollment for the three years preceding 24/25.

Part A. K-12 Pupil Data

Grade	7th Prev.	6th Prev.	5th Prev.	4th Prev.	3rd Prev.	2nd Prev.	Previous	Current
K	/	/	/	/	/	/	/	/
1								
2								
3								
4								
5								
6								
7								
8								
9								
10								
11								
12								
TOTAL	0	0	0	0	0	0	0	0

OPSC's website also currently features an [Enrollment Calculator](#) to assist districts in determining projected enrollment.



Although school districts should provide high-level substantiation to justify their projections, enrollment data does not need to be verified by OPSC/SAB prior to submittal of their Master Plan. The table below shows an example of a school district that has calculated its projected enrollment. The school district provided substantiation for its calculations by including the enrollment data for the current and the previous five years by school site. If the school district had augmented their projected enrollment with birth rates or dwelling units, the Master Plan would also provide reference to those documents.

Historic District-Wide Enrollment

School Name	5 Years Prior	4 Years Prior	3 Years Prior	2 Years Prior	1 Year Prior	Current Year
	19/20	20/21	21/22	22/23	23/24	24/25
Alpha Charter	36	19	27	21	11	28
Beta Middle	286	258	244	229	209	188
Gamma Elementary	960	747	815	923	1,177	1,434
Delta High	2,331	2,174	2,127	2,016	2,165	2,148
Total	3,613	3,198	3,213	3,189	3,562	3,798

Five-Year Projected Enrollment

1 Year Projection	2 Year Projection	3 Year Projection	4 Year Projection	5 Year Projection
25/26	26/27	27/28	28/29	29/30
4,029	4,606	5,018	5,433	5,827

Capital Planning Budget

Subdivision (c) of EC Section 17070.54 states: The school facilities master plan shall include, but is not limited to, all of the following information: ... (4) A capital planning budget outlining the applicable school district's projects...

Statute requires the Master Plan to include a capital planning budget. To fulfill this requirement, the school district may submit a narrative that outlines the anticipated budget, and expenditure needs to complete the significant capital outlay projects that are included in the Master Plan.

The school district may choose to present this information in any selected format. The school district may decide what type of projects to include in the master plan based on size, site, dollar value, etc. and may also decide how much detail to include on the scope of each project.

Below is an example of a school district that chose to use a web interface for their capital planning budget. The school district has broken down the costs associated with their planned projects according to school site.

Example 1 : Capital Planning Budget

Recommended Project List

Health, Safety, and Accessibility Projects		Vision Projects	
Facility Name	Hardcost	School	Hardcost
A. Warren McClaskey Adult Center	\$542,524	Bowling Green Chacon Language & Science Academy Elementary	\$35,996,740
A.M. Winn K-8	\$35,722	Cesar E. Chavez Elementary	\$29,112,150
Abraham Lincoln Elementary	\$30,441	Edward Kemble Elementary	\$28,809,945
Albert Einstein Middle	\$1,678,161	Ethel I. Baker Elementary	\$27,441,310
Alice Birney Public Waldorf K-8	\$540,263	Fern Bacon Middle	\$53,482,600
American Legion High	\$24,649	Fr. Keith B Kenny K-8	\$6,816,480
Arthur A. Benjamin Health Professions High	\$31,540	Leataata Floyd Elementary	\$24,729,480
Bret Harte Elementary	\$1,024,016	Nicholas Elementary	\$38,301,030
C.B. Wire Elementary	\$473,526	Oak Ridge Elementary	\$24,273,080
C.K. McClatchy High	\$6,333,995	Pacific Elementary	\$24,729,480
Caleb Greenwood Elementary	\$6,856	Peter Burnett Elementary	\$33,049,100
California Middle	\$750,152	Will C. Wood Middle	\$55,609,400
California Montessori Project - Capitol Campus K-8	\$186,071	Subtotal	\$382,350,795
Camellia Basic Elementary	\$727,267		
Capital City School (Independent Study) Multiple Grade	\$29,174		
Capitol Collegiate Academy K-8	\$496,297		
Caroline Wenzel Elementary	\$184,995		
Charles A. Jones Adult	\$1,123,064		
Collis P. Huntington Elementary	\$451,154		
Crocker/Riverside Elementary	\$429,689		
David Lubin Elementary	\$418,288		
Earl Warren Elementary	\$266,505		
Edward Kelly Preschool Preschool	\$324,872		
Elder Creek Elementary	\$19,198		
Ethel Phillips Elementary	\$743,903		
Fruit Ridge Elementary	\$189,597		
G.W. Carver School of Arts and Science High	\$19,063		
Genevieve F. Didion K-8	\$135,885		
Golden Empire Elementary	\$5,533		
H.W. Harkness Elementary	\$431,012		
Hiram Johnson Family Education Center Preschool	\$96,650		
Hiram Johnson High	\$5,888,617		
Hollywood Park Elementary	\$522,268		
Subtotal	\$48,927,865		

COST BREAKDOWN	
Improvement Project Hard Cost Adjustment for Region (+75%)	\$36,695,899
Total Hard Costs Subtotal	\$467,974,559
Soft Costs	\$93,594,912
Escalation	\$121,665,656
Contingency	\$68,323,513
Total Probable Cost	\$751,558,639

Facilities Condition Assessment

Although not required by statute, school districts are advised that maintaining an ongoing record of facilities' condition is helpful in creating a capital planning budget. By annually assessing the current state of their facilities across school sites, school districts can identify, plan, and budget for facility needs.

In the example above, each school site is linked to a facility assessment that identifies the current conditions of facilities onsite and estimated costs to maintain these facilities over the next ten years. Facilities assessments provide a framework for identifying the school district's needs and prioritizing their budget accordingly. CDE's *Guide to Development of Long-range Facilities Master Plan* publication has several forms to assist school districts in evaluating their

facilities. A sample Form 1.02e *Evaluation of School Facilities* from the guide can be found on page 40 of the Appendix and will be updated as newer versions come into circulation.

Additionally, the topic of Facilities Conditions Assessments is further explored in the “Other Considerations” chapter of this guidebook.

Financing

Subdivision (c) of EC Section 17070.54 states: The school facilities master plan shall include, but is not limited to, all of the following information: ... (5) The financing and other funding sources that would be used to support the acquisition of the applicable schoolsite, new construction project, modernization project, and lead testing and remediation projects...

Statute requires the Master Plan to include financing information. Similar to the Capital Planning Budget, this component could also be presented in narrative format. The document should provide an overview of the school district’s assessed value, bonding capacity, , historical and current general obligation bond initiatives, and the status of any authorized or unsold bonds. Additionally, the plan should include current bonded indebtedness and a breakdown of other local revenue sources, such as developer fees, Mello-Roos Community Facilities Districts (CFDs), and Local Control Funding Formula (LCFF) allocations. Because much of this information is required as part of the Financial Hardship Fund Worksheet (see below), school districts may use this form as a resource to summarize their funds.

FINANCIAL HARSHIP WORKSHEET			
CURRENT FINANCIAL CONDITION OF DISTRICT TO SUPPORT FINANCIAL HARSHIP REQUEST			
DISTRICT	COUNTY		
CAPITAL PROJECT FUND			
Statement of revenues, expenditures and changes in fund balance for fund	Column 1 Amounts from District's Audited Financial Statement June 30, _____	Column 2 Subsequent Events as of _____	Column 3 Subsequent Events as of _____
Revenues (Actual):			
Developer Fees	\$0	\$0	\$0
Federal Funds	0	0	0
Redevelopment Funds	0	0	0
Surplus Property Sales	0	0	0
General Obligation Bonds	0	0	0
Earnings on Investments	0	0	0
Other Local Revenues	0	0	0
Other -	0	0	0
(1) Total Revenues	\$0.00	\$0.00	\$0.00

The financing section should also provide information for all other funding sources that could fund projects or be used toward the required local match for all SFP projects. This includes any anticipated SFP apportionments. If applicable, the narrative could also include the school district’s Financial Hardship status.

Lastly, the narrative may address the status of SFP funding as it pertains to the current processing timelines. This includes wait times from submittal to processing and/or acknowledgement that funding from any oversubscribed programs is dependent on the passage of a future statewide facilities bond for any applications on the Applications Received Beyond Bond Authority (ARBBA) List.

Assessed Current Value

Subdivision (c) of EC Section 17070.54 states: The school facilities master plan shall include, but is not limited to, all of the following information: ... (6) Verification of the applicable school district's current assessed value from the appropriate local government entity that collects and maintains this information...

Statute requires the Master Plan to include verification of the school district's current assessed value. The school district must provide documentation from the applicable county of the Gross Assessed Value of all taxable property in the school district. This information can be obtained from the local County Auditors or Assessor's Office. The assessment is updated annually every August, and the school district must provide the most recent version of the document. Keeping an updated assessment on file is beneficial for school districts to calculate their local bonding capacity if they request an adjustment to the local matching share for SFP applications. The assessment is also required documentation for purposes of determining Financial Hardship eligibility.

Deferred Maintenance Plan

Subdivision (c) of EC Section 17070.54 states: The school facilities master plan shall include, but is not limited to, all of the following information: ... (7) The school district's deferred maintenance plan certified pursuant to Section 17070.75...

Statute requires the Master Plan to include a Deferred Maintenance Plan (DMP). The cited EC Section 17070.75 requires school districts to make all necessary repairs, renewals, and replacements to ensure that a project is at all times maintained in good repair, working order, and condition. As part of this requirement, school districts are required to have a publicly approved ongoing and major maintenance plan that outlines the use of funds deposited, or to be deposited into their Routine Restricted Maintenance Account (RRMA). The RRMA is a reserve for school districts to contribute funds for the exclusive purpose of funding these projects.

The intent of the DMP is to forecast deferred maintenance projects and their estimated costs within the school district over the next five years. At times, there may be overlap between the Capital Planning Budget and Financing sections, as each component could inform another. Note, the DMP does not need to be specific, nor is the school district committed to performing all work outlined in the plan. The school district may submit an attachment or a link to the locally approved DMP or the local board agenda in which it was approved to demonstrate compliance.

Some examples of Deferred Maintenance projects include:

Floor Covering	Painting	Electrical	Classroom Lighting
<ul style="list-style-type: none"> • Carpeting • Asphalt Tile and 	<ul style="list-style-type: none"> • Interior of classrooms, library, offices, 	<ul style="list-style-type: none"> • Panels and boards • Signal systems, 	<ul style="list-style-type: none"> • Substandard incandescent lighting

ATTACHMENT A7e

Vinyl Asbestos Tile • Hardwood Floors	hallways, cafeteria, restrooms, etc. • Exterior stucco, masonry, wood, and metal trim	including fire alarms and public address • Conductors and cables	and obsolete fluorescent lighting • Fixtures
Plumbing	Roofing	HVAC	Wall Systems
• Piping within boundaries • Underground gas, water • Sewer, leech fields • Well replacement	• Large sections or whole buildings of roofing systems • Flashings, gutters, and downspouts • Ceiling tiles	• Heating • Gas-fired unvented wall heaters • Other heating systems <ul style="list-style-type: none"> ◦ Boilers ◦ Piping ◦ Individual heating units except gas-fired wall heaters <ul style="list-style-type: none"> • Ventilation and Air-Conditioning Systems <ul style="list-style-type: none"> ◦ Central systems ◦ Individual units • Cafeteria and automotive fume exhaust systems 	• Doors including hardware • Window Assemblies (including wood sash) • Indoor gym bleachers that pull out from wall • Siding • Restroom partitions (attached to wall)
Paving	Underground Toxic Tank	Asbestos	Lead
• Asphalt • Slurry coat • Seal • Concrete	• Removal • Clean-up	• Inspection, sampling, and analysis • Removal or encapsulation	• Inspection, sampling, and analysis • Removal or control management

Although no longer active, the *Five Year Plan* (Form SAB 40-20) from the Deferred Maintenance Program is available as a resource which may be used by school districts to compile a summary of pending deferred maintenance projects at the applicable school sites. The form provides fields for the school district to enter the number of projects according to project categories, the estimated costs for each upcoming fiscal year, the sites where deferred maintenance projects are planned, and any additional information. A screenshot of a sample Form SAB 40-20 is below.

ATTACHMENT A7e

STATE OF CALIFORNIA
FIVE YEAR PLAN
DEFERRED MAINTENANCE PROGRAM
SAB 40-20 (REV 12/10)

STATE ALLOCATION BOARD
OFFICE OF PUBLIC SCHOOL CONSTRUCTION

Page 2 of 3

SCHOOL DISTRICT OPSC School District	FIVE-DIGIT DISTRICT CODE NUMBER (SEE CALIFORNIA PUBLIC SCHOOL DIRECTORY) 12345
COUNTY Sacramento	CURRENT FISCAL YEAR 2026

The district:

has not previously submitted a Five Year Plan.
 Is submitting this updated/revised Five Year Plan which supersedes the plan currently on file with SAB.

Part I—Authorized District Representative

The following individual has been designated as a district representative by the school board minutes:

DISTRICT REPRESENTATIVE John Smith	TITLE Superintendent
BUSINESS ADDRESS 707 Third Street	TELEPHONE NUMBER (916) 376-1771
E-MAIL ADDRESS opsccommunications@dgs.ca.gov	FAX NUMBER (916) 375-6721

Part II—Estimated Fiscal Year Data

PROJECT CATEGORY	1. NUMBER OF PROJECTS	2. CURRENT FISCAL YEAR	3. SECOND FISCAL YEAR	4. THIRD FISCAL YEAR	5. FOURTH FISCAL YEAR	6. FIFTH FISCAL YEAR	7. TOTAL ESTIMATE COST
Asbestos							0.00
Classroom Lighting	3		10,000.00		3,000.00	3,000.00	16,000.00
Electrical	3	44,000.00	3,000.00			3,000.00	50,000.00
Floor Covering	1	30,000.00				30,000.00	60,000.00
HVAC	3		10,000.00		6,000.00	4,000.00	20,000.00
Lead							0.00
Painting	2	5,000.00			3,000.00		8,000.00
Paving	1			5,000.00			5,000.00
Plumbing	2		5,000.00	60,000.00			65,000.00
Roofing	1	2,000.00			5,000.00		7,000.00
Underground Tanks							0.00
Wall Systems							0.00
8. Grand Total	16	81,000.00	28,000.00	65,000.00	17,000.00	40,000.00	231,000.00

9. Remarks

Narrative

Subdivision (c) of EC Section 17070.54 states: The school facilities master plan shall include, but is not limited to, all of the following information: ... (8) A narrative describing how the school facilities master plan is consistent with the goals, actions, and services identified in the school district's local control and accountability plan for the first state priority, as described in paragraph (1) of subdivision (d) of Section 52060, as it relates to school facilities...

Statute requires the Master Plan to include a narrative describing how the plan is consistent with the school district's goals, actions, and services of their Local Control and Accountability Plan (LCAP), pursuant to EC Section 52060. The referenced Education Code is below:

(d) All of the following are state priorities for purposes of a school district's local control and accountability plan:

(1) The degree to which the teachers of the school district are appropriately assigned in accordance with Section 44258.9, and fully credentialed in the subject areas, and, for the pupils they are teaching, every pupil in the school district has sufficient access to the standards-aligned instructional materials as determined pursuant to Section 60119, and school facilities are maintained in good repair, as defined in subdivision (d) of Section 17002.

CDE has a dedicated webpage for LCAP resources which can be accessed here:

<https://www.cde.ca.gov/re/lc>

The cited statute conveys the importance of learning conditions and adequacy of school facilities to support student achievement. Therefore, the narrative should describe how proposed facility plans directly support the district's strategic goals, improve student engagement, and ensure equity in learning environments. By connecting each component of the Master Plan to specific educational priorities, the school district can effectively communicate its commitment to creating safe, inclusive, and future-ready campuses that foster student success. Additional information on Educational Specifications will be further addressed in the next chapter for "Other Considerations."

Chapter 3: Cost Reduction Tools

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Introduction

California has over 1,000 school districts and 58 county offices of education, each with its own unique facilities needs and varying access to funding. As a school district develops its Master Plan and considers how it can construct new and/or modernize existing facilities to house students for years to come, it may encounter challenges with construction costs or be faced with balancing funding priorities in the school district. Therefore, school districts are advised to consider areas that collectively influence the cost of school construction. This chapter identifies some of the key areas and processes that impact the cost of construction and provides suggestions of how to achieve measurable cost savings. This chapter is an abbreviated and updated version of information from the April 26, 2000 *Public School Construction Cost Reduction Guidelines* prepared by Vanir Construction Management, Inc., with Harry C. Hallenbeck, FAIA as Project Director, in consultation with a diverse stakeholder Cost Reduction Workgroup, at the solicitation of the State Allocation Board.

District Responsibilities

Minimizing construction costs begins with good direction and project management from the school district. School districts should be aware of the value of good planning and the potential increase in the cost of a project due to the lack of a valid and complete planning effort. A well-developed Master Plan benefits the school district because it becomes 1) the commitment by the school district and community as to the direction of its educational facilities, and 2) the direction to the design professional so that false starts are avoided.

Joint-Use Facilities

A joint-use facility is a facility of any type, core or otherwise, that has a shared use by, and benefit to, two or more entities through a contractual agreement; the development of which, including the cost of land and improvements, plus operation if it is part of the development agreement, results in a lower initial project cost to the school district, as compared to the school district having to provide a project that meets its needs individually.

There are several reasons for considering Joint-Use: 1) to achieve better facilities, 2) to achieve a better use of public funds, and 3) to reduce the school district's costs for facilities. However, impediments also exist such as: 1) the opportunities are just not available, 2) there is concern about compromising the school district's political independence, 3) the benefits don't offset the risks, or 4) the costs are excessive. The key is to seek the opportunities, to weigh the pros and cons, and to mesh the right project into the school district's facilities master plan.

School districts should evaluate whether the proposed Joint-Use project will save money. Although a Joint-Use project may be able to reduce the initial cost to the school district since part of the cost is paid by the Joint-Use partner, the total cost may not be less since it must serve both parties and there can be a tendency to over build the facility. In considering potential cost savings from the development of Joint-Uses facilities, it is important to keep in mind:

1. The benefit, to each of the participants in the Joint-Use, needs to be identified and documented. Support and involvement from the community is a mutual benefit.
2. There should be a formal agreement documenting the Joint-Use relationships and responsibilities.

3. The cost and time to design and construct the Joint-Use project could be significantly more than a comparable school-only facility.

The approach to reducing costs through the development of Joint-Use projects, is rooted in three basic precepts:

1. The school district must actively pursue the opportunities.
2. The benefits must accrue to all parties to the Joint-Use.
3. The costs to the school district must be less than building the facility on its own.

Site Concerns

When accounting for site related concerns, there are two basic cost elements: 1) the acquisition costs, and 2) the improvement costs. A school district may be able to acquire a property that meets good demographic and educational criteria, but negatively impacts, or even fails, good construction cost criteria. School district should avoid acquiring property that has potential design and construction difficulties. In considering the potential cost impacts relative to Site Concerns, it is important to keep in mind:

1. The cost of site acquisition will impact the cost of improvements; i.e. size, shape, slope, availability of infrastructure, and environment all impact the value of the site and subsequently the construction costs.
2. There is no perfect site; often it is best to select an alternate site in consideration of subsequent construction costs.
3. Mitigating site problems that are either unknown or unconsidered at the time of acquisition, can be very costly even to the point of prohibitive.
4. Thorough investigation and advance planning can help reduce the unknown and unconsidered problems.

The approach to reducing the costs relative to Site Concerns, is rooted in the following precepts:

1. Select the site carefully, considering both the educational criteria and the design and construction impact.
2. Become fully involved in local land planning details that will affect the demographics, the availability, and the value of the school district's current and future property; involve the community in the selection.
3. Plan ahead; undertake and update long range Facilities Master Plans.

Professional Consultants

Professional consultants can comprise a significant portion of the soft cost on a construction project. Architects, attorneys, bond counsel, and financial advisors are the most commonly thought of consultants. However, numerous other consultants may be involved in the school construction process. In considering consultant services, there are several things to keep in mind:

1. State requirements governing the school construction process are extensive, with numerous stakeholders, decision makers and approving authorities.
2. Consider the relative experience and expertise of any potential consultant and cost-benefit considerations in employing their services.

3. Project planning and design are critical components relative to controlling subsequent construction costs, long term life-cycle costs, and quality of the educational facility and environment. Shortcuts at this stage may result in higher costs later in the life of the project.

The approach to reducing costs of professional consultants, without reducing the quality of the completed project, is rooted in three basic precepts:

1. Establishing a clear definition of the scope of services required, thus avoiding duplication or overlap of services, including the time restraint for providing the services, and the fee anticipated for the services.
2. Using the fewest, but most expert consultants possible through careful selection.
3. Managing their services through constant, prompt and thorough interaction.

Contractors

Contractors are associated primarily with the hard costs of the school construction process. In considering contractors and their subcontractors, there are several things to keep in mind:

1. The school construction process is very competitive, and quality can vary among contractors and subcontractors.
2. The school district must ensure it follows all pertinent Public Contract Code requirements in solicitation and selection of bids.
3. The form of project delivery can be less important than the quality of the entity with whom the school district is contracting. The contractor is the school district's partner in a major undertaking; careful selection is essential.

The approach to reducing costs of construction without reducing the quality of the completed project, is rooted in three basic precepts:

1. Utilizing a thorough pre-qualification system that will solicit the most qualified contractors for the project.
2. Managing the construction phase through constant interaction and open communication.
3. Managing the Change Orders and Dispute Resolutions assertively and in a timely manner.

Agencies

There are numerous state and local agencies that a school district must work with in the planning, design, and construction of a school. Both state and local agencies can affect the cost of a project from initial site selection and utilization to final approval of a fire hydrant. In considering the potential cost impacts from each agency, it is important to keep in mind:

1. The agency "cost" is in two forms: 1) direct fees and/or charges for services rendered, and 2) indirect costs resultant from decisions and/or requirements.
2. The perception that school districts are independent of local control is not correct for many aspects of the planning, design, or construction of facilities.
3. All agencies, state and local, are control oriented and their requirements may add to or delay approvals of a project.

The approach to reducing the costs related to state and local agencies, is rooted in three basic precepts:

1. Know what you don't know. Recognize your limitations and ask for help where you need it.
2. Become fully involved in both local and state agency issues.
3. Work with the agency staffs, who can often provide technical assistance in navigating their processes, free of charge.

Types of Construction

Types of construction for public schools can vary significantly, and, in their selections, school districts must weigh the impact of everything from building configuration to the building's life expectancy and methods and materials of construction.

In considering the potential cost impacts relative to the types of construction, it is important to keep in mind:

1. The type of construction is dictated early in the design process by such things as building use and size, its locale and environment, and the image that the school district and community desire.
2. The desired materials and finishes of construction can be provided in a variety of ways which can affect the cost without reducing the quality.
3. The methods of construction are generally left to the contractor, but can be influenced, and even dictated by the design, including the number of factory-built components.

The approach to reducing the costs of construction, is rooted in the following precepts:

1. Keep the design as simple as possible; good architecture and good educational environments do not need overstatements of configuration, materials or finishes.
2. Utilize standard elements that work well, are readily available, and tested over time.
3. Maximize the use of factory-built components, wherever they best suit the design.

Prototypes

A prototype is a school, or major component of a school, that is designed and constructed with the intent that the design will be repeated several times. In thinking about cost reduction techniques, a prototype school design must be: 1) one that is intended to be copied, and 2) one that's design and construction are refined sufficiently as to be worthy of copy. The definition includes the modeling of a whole school or any of its major components. The use of prototypes is more applicable to new construction than to modernization. As a school district considers the development of a new facility, whole or component, the school district should consider basing its new facility on a previously developed prototype.

In considering the use of prototypes, there are several things to keep in mind:

1. The initial prototype design process is more extensive than normal due to the fact that the design is intended to be copied at various sites.
2. The educational specifications and the input of each intended school's community is essential.

3. The school district may spend a little more on the prototype but will make it up with substantial savings on the repeats.

The approach to reducing costs through the use of prototypes, without reducing the quality of the completed project, is rooted in the following precepts:

1. Expend the time and resources necessary to fully research the best educational components from colleague districts so that the prototype design represents the very best thinking and experience.
2. Design the prototype as a complement of basic educational components to ensure maximum flexibility for future uses and educational changes.
3. Keep the basic components as simple as possible but include the ability to tailor the exterior visual character to the local community.

Project Delivery

Project Delivery is a phrase used by the design and construction industry to describe the processes necessary to design and build a project. In general, the public school system in California is restricted to only a few of the common methods of project delivery that are available to other public and private institutions. There are several options available to school districts, each of which should be considered at the outset of a project.

In considering the use of various project delivery methods, there are several things to keep in mind:

1. The school district should consider all methods allowed by law, to achieve the most cost-effective project delivery.
2. The school district's selection of the traditional design-bid-build method, or another method will affect the time and cost of accomplishing the project.
3. The choice of which method to use may come down to the school district's own capability to manage the process, and the style in which the district is most comfortable.

The approach to reducing costs through the use of a specific project delivery method, without reducing the quality of the completed project, is rooted in the following precepts:

1. Regardless of the project delivery method used, the qualifications, capability, and commitment of the entities involved will dictate the success of the project.
2. The individual, professional responsibility of each entity involved remains the same. The school district, the design consultant, the general contractor, and each subcontractor is equally responsible for their portion of the work regardless of the type of project delivery.
3. There is no one best method for all scenarios and projects; all should be considered.

Conclusion

In order to effectively utilize their capital outlay resources, school districts need to budget accurately and completely. This includes both long-range fiscal planning, and short-range project planning outlined in a complete Master Plan. In order to reduce the cost of each individual project and thereby accomplish more projects or fund other school district priorities, school districts must prepare, plan, prioritize their needs, set realistic budgets, and manage the process.

The proper design and construction process includes:

1. A good facilities Master Plan
2. Well established school district priorities
3. Careful needs assessment of existing facilities
4. Realistic project budgeting and financial projections
5. Strong project and construction management
6. Cost-effective design solutions
7. Utilization of good contractors and systems

School districts have an opportunity, and an obligation, to provide the best school facilities possible within the resources available. The key will be in knowing how to set realistic budgets and in ensuring that project designs adhere to those budgets.

Chapter 4: Other Considerations

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Introduction

The previous chapter outlined the statutory requirements of the Master Plan. This chapter explores additional factors that school districts may consider when developing facilities plans. From sustainability to educational specifications, these considerations are intended to ensure that the Master Plan supports the school district's goals and best serves its community.

The following recommendations are provided based on input from CDE, DSA, and numerous stakeholders that provided feedback during the implementation of Proposition 2.

Seismic Safety:

When developing a campus-wide master plan and modernizing existing facilities, due consideration should be made to the seismic vulnerabilities that may exist that affect life safety. While not a mandatory requirement for most SFP funding, a seismic evaluation or screening of the existing facilities should be considered and a long-term strategy developed to mitigate any such hazards as part of any master plan. Various strategies could be employed, such as phasing voluntary seismic strengthening as ceilings are replaced or strengthening or removing from service the most vulnerable buildings. Seismic safety issues in existing buildings can vary from the entire building structural system or to nonstructural elements such as ceilings, veneers, and equipment supports. Modernization projects generally extend the useful life of the building and as such, the seismic safety should also be addressed to protect the occupants and investment. A structural engineering firm can be engaged to provide services to screen the existing building inventory for seismic hazards. This work is often done by performing a Tier 1 screening in accordance with ASCE 41, Seismic Evaluation and Retrofit of Existing Buildings.



Sustainability

Sustainability and environmental impact are important considerations in school facilities planning and can be addressed in the development of a Master Plan. School districts can incorporate these considerations by evaluating energy efficiency, using renewable energy options, selecting environmentally responsible materials, and considering long-term environmental impacts in their planning and decision-making processes.

For example, school districts can consider spacing facilities to accommodate more trees. This allows for tree canopy expansion and reduces heat islands on campus. Most school sites are well shaded around the perimeter of the school; however, incorporating more trees throughout the site provides students with shade and protection from extreme heat for years to come. Additionally, school districts concerned about extreme heat may include strategies to procure cool roofing systems, utilize heat-resistant paint to protect HVAC systems, or lease solar as part of their Master Plan.

Below are several resources to assist with the development of sustainable school facilities:

OPSC Joint Agency Workshop – Designing and Constructing Sustainable Facilities

On Friday, Sept. 9, 2022, OPSC, CDE, DSA, and the California Department of Forestry and Fire Protection (CAL FIRE) conducted a free [workshop](#) to provide information on school planning, design, and the availability of state funding to help local educational agencies build sustainable facilities and outdoor spaces. Topics included:

- Green Building and Energy Codes and Standards
- DSA's education and outreach program

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- Educational Specification Considerations
- Funding opportunities for green buildings and schoolyards
- Case Study – A School District Perspective

Green Ribbon Schools Award Program

The [California Green Ribbon Schools](#) (CA-GRS) recognition award honors K-12 schools, school districts, and county offices of education that demonstrate exemplary achievement in three key areas: resource efficiency, health and wellness, and environmental and sustainability education. This recognition is part of a broader statewide effort to identify and promote effective practices that enhance student engagement, academic performance, graduation rates, and career readiness. School districts may refer to [Past Green Achiever Selectees](#) for examples of successful sustainable facilities projects throughout the state of California.

Collaborative for High Performance Schools (CHPS)

The [Collaborative for High Performance Schools \(CHPS\)](#) has resources for creating and maintaining high performance schools. Publications and resources such as its Best Practices Manuals, Volumes 1-4, a list of low-emitting products, and sample specifications for high performance portable classrooms, to name a few, can be found on their website. This organization also provides training in their best practices manuals.

Leadership in Energy and Environmental Design (LEED)

[LEED](#) is a green building certification program developed by the U.S. Green Building Council. It provides a framework for designing, constructing, operating, and maintaining environmentally responsible and resource-efficient buildings. LEED certification is a widely recognized standard for sustainability in the built environment.

Facility Inspection Tool Findings

The Facility Inspection Tool (FIT) was developed by OPSC to determine if a school facility is in “good repair” as defined by EC Section 17002(d)(1) and to rate the facility pursuant to EC Section 17002(d)(2). The tool is designed to identify areas of a school site that are in need of repair based upon a visual inspection of the site and can be used in conjunction with a facilities condition assessment

“Good repair” is defined to mean that the facility is maintained in a manner that ensures that it is clean, safe, and functional. As part of the School Accountability Report Card, school districts and county offices of education are required to make specified assessments of school conditions, including the safety, cleanliness, and adequacy of school facilities and needed maintenance to ensure good repair. School districts and county offices of education must certify that a facility inspection system has been established to ensure that each of their facilities is maintained in good repair in order to participate in the SFP. This tool is intended to assist school districts and county offices of education in that determination.

Although the completed form is not submitted to OPSC, findings from the FIT can also inform the development of a Master Plan in multiple ways. School districts can address or embed their findings as part of their Master Plan. The findings can provide a starting point for school districts to determine priorities for future funding projects. By performing a walk-through of their school sites and identifying any deficiencies, school districts may begin planning for future expenses as they relate to maintaining good repair of their facilities or any other visionary projects.

School District's Education Specifications

Education Specifications (Ed Specs) are used by school districts when planning, designing, and constructing school facilities. These specifications ensure that their facilities support their specific educational program.

"The shape of our students' learning environment must be carefully planned to support our educational objectives as well as to provide clean, safe, and technologically up to date facilities. The planning process begins with the definition of educational goals and development of educational specifications."

[Education Specification: Linking Design of School Facilities to Educational Program, CDE, 1997](#)

A school district's unique vision outlined in its Ed Specs can inform many components of the Master Plan and district priorities. Conversely, Ed Specs may rely on the data presented in the Master Plan. It may be beneficial to develop both the Master Plan and Ed Specs in tandem to ensure the district's overall goals and site-specific visions are aligned.

AI Driven Educational Planning and Reporting Tools

To the extent their use is permitted by any particular school district, school districts may consider exploring the use of AI-driven platforms in the development of their Master Plan. These tools can save time and reduce costs by organizing data, generating draft content, and aligning plans with statute. Some platforms are even designed for educational planning and facilities reporting. However, school districts are advised that knowledgeable individuals familiar with the district should provide the inputs and review and amend the final plan as necessary to ensure all statutory requirements are fully addressed.

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Appendix 1 - Authority

Education Code Section 17070.54. Submission and contents of school facilities master plans; guidelines and instructions; updates.

(a) As a condition of participating in the school facilities program, a school district shall submit to the department a five-year school facilities master plan, or updated five-year school facilities master plan, approved by the governing board of the school district.

(b) The school facilities master plan submitted pursuant to subdivision (a) shall include information on the school district's eligibility for state bond funding pursuant to this chapter.

(c) The school facilities master plan shall include, but is not limited to, all of the following information:

- (1) An inventory of existing facilities, sites, and property pursuant to subdivision (d).
- (2) Existing classroom capacity, as determined pursuant to Sections 17071.10 and 17071.25.
- (3) Projected enrollment growth for the applicable school district over the next five years, accounting for growth pursuant to Sections 17071.75 and 17071.76.
- (4) A capital planning budget outlining the applicable school district's projects.
- (5) The financing and other funding sources that would be used to support the acquisition of the applicable schoolsite, new construction project, modernization project, and lead testing and remediation projects.
- (6) Verification of the applicable school district's current assessed value from the appropriate local government entity that collects and maintains this information.
- (7) The school district's deferred maintenance plan certified pursuant to Section 17070.75.
- (8) A narrative describing how the school facilities master plan is consistent with the goals, actions, and services identified in the school district's local control and accountability plan for the first state priority, as described in paragraph (1) of subdivision (d) of Section 52060, as it relates to school facilities.

(d) The department, in consultation with the State Department of Education, shall develop guidelines that school districts may use to guide the development of the school facilities master plan required as a condition of participating in the school facilities program. The department, in consultation with the State Department of Education, shall develop guidelines or standards that school districts shall use to develop and submit the inventory required pursuant to paragraph (1) of subdivision (c) for every school in the school district, including, but not limited to, all of the following:

- (1) The year each building at the school that is currently used for instructional purposes was constructed.
- (2) The square footage of each building that is currently used for instructional purposes.
- (3) The year, if any, each building that is currently used for instructional purposes was last modernized.
- (4) The pupil capacity of the school.
- (5) The age and number of portable buildings at the school.
- (6) Whether the school has any of the following:
 - (A) A cafeteria or multipurpose room.
 - (B) A library.
 - (C) A gymnasium.

(e) The Controller shall include the instructions necessary to verify that all of the required components of this section are reflected in a participating school district's school facilities master plan in the audit guide required by Section 14502.1, as part of the audit procedures required pursuant to Section 41024.

(f) The school district shall update its school facilities master plan to reflect any changes in enrollment, capacity, or other areas, as appropriate for purposes of participating in the school facilities program.

Appendix 2 – Form 1.02e Evaluation of School Facilities



School Facilities Unit
California State
Department of Education

1.02e Evaluation of School Facilities
May, 1977
(Rev. March, 1986)

School	Grades	
Reported by	Date of report	
Item	Adequate	Comments on existing conditions and needed improvements
Site		
Size		
Location		
Safety		
Contours		
Development		
Playfields		
Pool		
Parking		
Landscaping		
Other		
Space		
Administration		
Health		
Teachers		
Audiovisual		
Library		
Multipurpose		
Stage		
Kitchen		
Gymnasium		
Showers		
Toilets		
Lockers		
Storage		
Instructional space		
Size		
Flexibility		
Utilization		
Expandability		
Access for the handicapped		
Other		
Light		
Quantity		
Brightness		
Reflectances		
Windows		
Screening		
Audiovisual		
Energy factors		
Other		

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School Facilities Unit
California State
Department of Education

1.02e Evaluation of School Facilities (Continued)
May, 1977
(Rev. March, 1986)

Item	Adequate	Comments on existing conditions and needed improvements
Heat and Air		
Temperature comfort		
Insulation		
Air exchange		
Distribution		
Exhaust		
Conditions		
Energy factors		
Other		
Sound		
Floor absorption		
Wall absorption		
Ceiling absorption		
Ballast absorption		
Vent absorption		
Exterior absorption		
Interior absorption		
Isolation		
Aesthetics		
Appropriateness		
Naturalness		
Continuity		
Screening		
Other		
Equipment		
Quantity		
Mobility		
Flexibility		
Maintenance		
Instructional walls		
Other		
Maintenance		
Turfed areas		
Sprinklers		
Parking		
Hardcourt		
Sidewalks		
Exteriors		
Interiors		
Roofing		
Windows		
Fencing		
Mechanical equipment		
Hardware		
Plumbing fixtures		
Other		

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**School Facilities Unit
California State
Department of Education**

1.02e Evaluation of School Facilities (Continued)

(Continued)
May 1977

May, 1977
(Rev. March 1986)

Item	Excellent	Good	Average	Poor	Not acceptable
Site					
Space					
Light					
Heat and air					
Sound					
Aesthetics					
Equipment					
Maintenance					
Overall rating					

Recommendations for needed corrections and improvements:

Appendix 3 – Five Year Plan (Form SAB 40-20)

STATE OF CALIFORNIA
FIVE YEAR PLAN
 DEFERRED MAINTENANCE PROGRAM
 SAB 40-20 (REV 12/10)

STATE ALLOCATION BOARD
 OFFICE OF PUBLIC SCHOOL CONSTRUCTION

Page 1 of 3

GENERAL INFORMATION

This Form is a summary of proposed deferred maintenance projects the applicant district plans on completing annually over the next five fiscal years using the Basic Grant, pursuant to Education Code Section 17591. The fiscal year the plan commences is determined by the fiscal year in which it was filed. New and revised plans are accepted on a continuous basis for the current fiscal year up to the last working day in June. Revisions are not accepted for prior fiscal years.

SPECIFIC INSTRUCTIONS

Part I—Authorized District Representative

Complete to designate or change the authorized district representative. Enter the name of the district employee that can act on behalf of the district. A consultant who is on contract with the district to communicate with the OPSC on behalf of the district's board may be listed.

Part II—Estimated Fiscal Year Data

ITEM	DESCRIPTION	INSTRUCTIONS
1	Number of Projects	List the number of eligible projects in each of the project categories shown (refer to Regulation Section 1866.4.1).
2–6	Current and subsequent fiscal years	Enter the total estimated costs in each project category for each fiscal year identified for the projects reported in column 1.
7	Total Estimated Cost	For each project category enter the totals of columns 2–6.
8	Grand Total	Total all columns.
9	Remarks	Include any additional information for each category. If the district is applying for extreme hardship grants for any of the projects listed on the plan, identify those projects in this space. If additional space is needed, you may attach a separate sheet with your remarks to this form.
10	School Information	List the facilities where deferred maintenance projects are planned as reported in column 1 on this Five Year Plan (refer to Regulation Section 1866.4.1). If additional space is needed, you may attach a separate sheet.
11	Certification	Review and complete (refer to Regulation Section 1866.4 and EC Section 17584.1).

When completed mail this form to:
 Office of Public School Construction
 Attn: Deferred Maintenance Program
 707 Third Street
 West Sacramento, CA 95605

NOTE: Any Five Year Plan, SAB 40-20, not conforming to State Allocation Board (SAB) guidelines will be returned to the district. If you need assistance in completing this form, please contact the Office of Public School Construction, at 916.376.1771.

ATTACHMENT A7e

STATE OF CALIFORNIA
FIVE YEAR PLAN
DEFERRED MAINTENANCE PROGRAM
SAB 40-20 (REV 12/10)

STATE ALLOCATION BOARD
OFFICE OF PUBLIC SCHOOL CONSTRUCTION

Page 2 of 3

SCHOOL DISTRICT	FIVE-DIGIT DISTRICT CODE NUMBER (SEE CALIFORNIA PUBLIC SCHOOL DIRECTORY)
COUNTY	CURRENT FISCAL YEAR

The district:

- has not previously submitted a Five Year Plan.
- Is submitting this updated/revised Five Year Plan which supersedes the plan currently on file with SAB.

Part I—Authorized District Representative

The following individual has been designated as a district representative by the school board minutes:

DISTRICT REPRESENTATIVE	TITLE
BUSINESS ADDRESS	TELEPHONE NUMBER
E-MAIL ADDRESS	FAX NUMBER

Part II—Estimated Fiscal Year Data

PROJECT CATEGORY	1. NUMBER OF PROJECTS	2. CURRENT FISCAL YEAR	3. SECOND FISCAL YEAR	4. THIRD FISCAL YEAR	5. FOURTH FISCAL YEAR	6. FIFTH FISCAL YEAR	7. TOTAL ESTIMATE COST
Asbestos							0.00
Classroom Lighting							0.00
Electrical							0.00
Floor Covering							0.00
HVAC							0.00
Lead							0.00
Painting							0.00
Paving							0.00
Plumbing							0.00
Roofing							0.00
Underground Tanks							0.00
Wall Systems							0.00
8. Grand Total	0	0.00	0.00	0.00	0.00	0.00	0.00

9. Remarks

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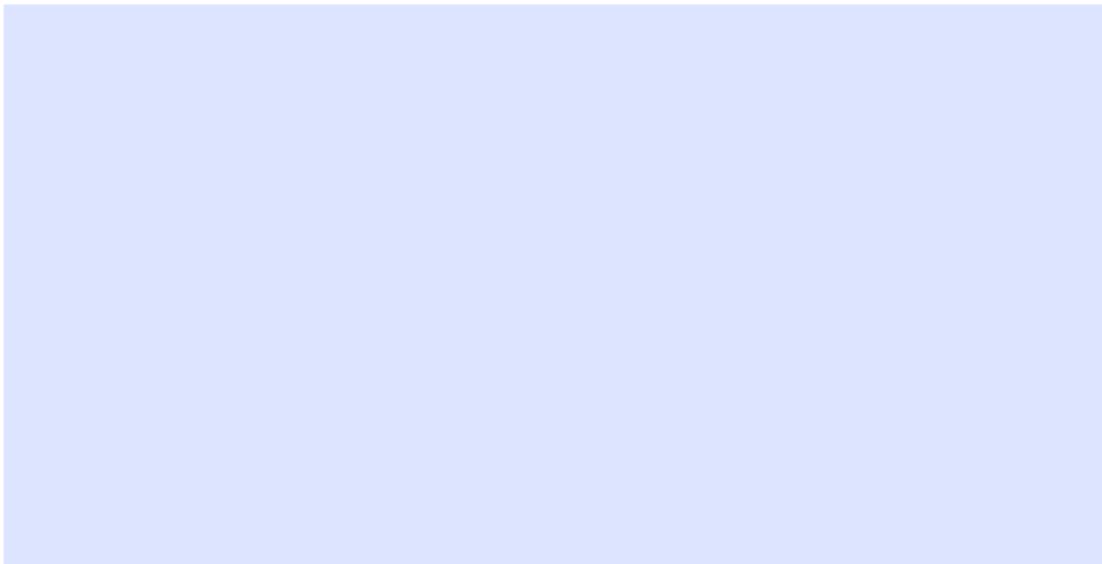
ATTACHMENT A7e

STATE OF CALIFORNIA
FIVE YEAR PLAN
DEFERRED MAINTENANCE PROGRAM
SAB 40-20 (REV 12/10)

STATE ALLOCATION BOARD
OFFICE OF PUBLIC SCHOOL CONSTRUCTION

Page 3 of 3

10. List the school names where deferred maintenance projects are planned in this Five Year Plan:



11. Certifications

I certify as District Representative that:

- this work does not include ineligible items and that all work will be completed in accordance with program requirements, applicable laws and regulations. The district shall maintain proper documentation in the event of an audit; and,
- the district understands that should an audit reveal that these funds were expended for other than eligible deferred maintenance costs, the SAB will require the district to return all inappropriately expended funds; and,
- the plans and proposals for expenditures of funds as outlined in this report were discussed in a public hearing at a regularly scheduled school board meeting on [REDACTED]; and the district has complied with all the other requirements of Education Code Sections 17584.1 and 17584.2; and,
- Beginning with the 2005/2006 fiscal year, the district has complied with Education Code Section 17070.75 (e) by establishing a facilities inspection system to ensure that each of its schools is maintained in good repair; and,
- This Form is an exact duplicate (verbatim) of the form provided by the OPSC. In the event a conflict should exist, then the language in the OPSC form will prevail.
- I certify under penalty of perjury under the laws of the State of California that the statements in this application and supporting documents are true and correct.

SIGNATURE OF DISTRICT REPRESENTATIVE		DATE
--------------------------------------	---	------

Appendix 3 - Resources

[OPSC School Facility Master Plans Webpage](#)

Stakeholders can obtain information on the five-year school facilities master plans that are required to be submitted for participation in the SFP.

[CDE Master Plans Resources Website](#)

CDE's Master Plans Resources webpage has a variety of resources and information to assist school districts in preparing facility master plans.

[OPSC Online](#)

The Office of Public School Construction's (OPSC) paperless online application system where applicants can electronically submit all School Facility Program (SFP) eligibility, funding, and expenditure report documents.

[OPSC Online Application Tools for School Construction Projects](#)

Stakeholders can access online applications developed by OPSC, such as OPSC Online, the SFP Grant Calculator, and the Project Tracking Number Generator, which generates Project Tracking numbers and provides a search function for school construction projects.

[OPSC Project Reporting](#)

OPSC's Project Reporting system is an application that allows stakeholders to access project status information for school projects. The information available includes various phases of the project and apportionment approval, fund release and category balances of the project.

[OPSC Grant Calculator](#)

OPSC's Grant Calculator provides an estimate of the potential funding associated with a complete application that has the total amount of eligibility available to request for the project.

[OPSC Enrollment Projection Calculator](#)

OPSC's Enrollment Projection Calculator calculates the district's projected enrollment according to the methodology outlined in SFP Regulations, which calculates projections based on annual enrollment changes and population trends within the community the district serves.

[OPSC Forms](#)

Stakeholders can access the latest revisions of all forms associated with SFP programs.

Proposed Certification on the *Application for Funding (Form SAB 50-04)*, *Application for Charter School Preliminary Apportionment (Form SAB 50-09)*, *Application for Career Technical Education Facilities Funding (Form SAB 50-10)*, and the *Application for Natural Disaster Assistance (Form SAB 195)*:

As applicable, the district certifies that a Five-Year School Facilities Master Plan, pursuant to Education Code Section 17070.54, was approved by the governing board of the school district on _____ and was filed with OPSC on _____. Pursuant to SFP Regulation Section 1859.18(c), the district certifies that:

there are no material changes to components of the Master Plan required in SFP Regulation Section 1859.18(d) since the date of governing board approval of the Master Plan, or

there has been a material change(s) to components of the Master Plan required in SFP Regulation Section 1859.18(d) since the date of governing board approval of the Master Plan, and an updated Master Plan or governing board resolution to acknowledge and address these changes has been included as a component of this application, or

this application is subject to an alternative Master Plan submittal timeline pursuant to SFP Regulation Section 1859.18.1 and a governing board resolution acknowledging any apportionment may be rescinded for failure to submit a valid Master Plan by the required timeline has been included as a component of this application.

Forthcoming Item

ATTACHMENT B1, B1a-g

Global School Facility Program Regulation Amendments Update

Forthcoming Item

ATTACHMENT C1, C1a-b

Evaluation of Transitional Kindergarten Pupils in School Facility Program Enrollment Projections



CALIFORNIA'S
COALITION
*for*ADEQUATE
SCHOOL HOUSINGSM

ATTACHMENT D

April 24, 2025

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San Bernardino
City USD
909/388-6100

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& HOLMES**
916/441-3300

Ms. Rebecca Kirk
Executive Officer, Office of Public School Construction
707 Third Street
West Sacramento, CA 95605

Subject: Proposition 2 Stakeholder Comments – Five-Year Master Plan

The Coalition for Adequate School Housing (CASH) appreciates the opportunity to provide feedback on the implementation of Proposition 2, the 2024 state school bond. This letter addresses the Five-Year Master Plan item presented by the Office of Public School Construction at the Stakeholder Meeting on April 10, 2025.

Proposition 2 established a new requirement to submit a five-year facilities Master Plan as a condition of participating in the School Facility Program (SFP) for applications submitted on or after October 31, 2024. CASH supports the general direction reflected in the implementation proposals for this item, and we remain committed to ensuring that the Master Plan requirement does not inhibit access to the SFP. California's school districts are diverse and plan their capital outlay programs in many ways, informed by district size, availability of resources and funding, and local community priorities. Therefore, it is important to provide flexibility and options that reflect the diversity of long-term planning efforts by school districts across the state. It is also important to allow school districts to utilize their current planning methods and documents, supplemented as needed to meet statutory requirements. As such, CASH previously recommended allowing districts to compile multiple documents to ensure that all statutory requirements are met, and we suggested the use of a Master Plan Verification Form to help districts compile these documents and provide clear, concise guidance on what is required pursuant to the statute.

Duration of a Master Plan

The agenda item for the April 10 stakeholder meeting recommends that when a Master Plan is submitted with a funding application, the plan must have at least four years remaining on the term of the plan, based on the date the plan was approved by the governing board. The proposal specifies that districts who are very active in the SFP would only need to update their plans once annually, and districts that submit applications every few years would need to update their plans prior to submittal of their next application if the plan has fewer than four years remaining.

CASH does not support this recommendation and does not believe it is in keeping with the intent of long-term planning established by Proposition 2. This proposal would effectively render a five-year Master Plan valid for only one year, which is contrary to the way that many districts undertake their long-term planning. Within the five-year timeline of a Master Plan, a district should be planning and executing projects identified in that plan. It would be counter-productive to require districts to continually re-set their plans on an annual basis.

ATTACHMENT D

This requirement would generate additional expense and administrative burden for districts that may already struggle to identify resources and personnel to plan, prepare, and submit funding applications. CASH advises against creating another hurdle to participating in the SFP, which would be especially problematic for small school districts and those without sufficient local resources.

We recognize that conditions in a school district may change within the five-year window of a Master Plan, such as enrollment, housing development, classroom capacity, and more. Such factors may be material to determining whether a school district has an eligible SFP project. These factors will be captured by the eligibility determination and other application documents that are already required to justify the need for each project. It would be duplicative to update the Master Plan to reflect these changes on an annual basis.

CASH recommends that a five-year Master Plan should be valid for five years from the date of approval by the governing board. Additionally, a district should not be required to submit a new or updated Master Plan for a specific application if the five-year term expires after the application has been submitted (i.e. a district should not be required to submit more than one Master Plan for one application).

We appreciate the spirit of collaboration and openness that your team has shown during this process. We thank you for the opportunity to provide these thoughts for your consideration.

Sincerely,



Rebekah Kalleen
CASH Legislative Advocate

cc: Michael Watanabe, Deputy Executive Officer, Office of Public School Construction
Brian LaPask, Chief of Program Services, Office of Public School Construction



To: OPSCCommunications@dgs.ca.gov
From: Center for Cities and Schools, UC Berkeley
Date: April 25, 2025
Re: Comments on Proposition 2 requirement for 5-year facilities master plans

Dear members of the OPSC Proposition 2 implementation team:

This email is in response to the request for public feedback on elements of the 5-year facilities master plan (FMP) requirement in Proposition 2 / AB 247. In particular, we are responding to four questions raised in earlier stakeholder agendas:

1. Guidelines for school districts to use in the development of the Master Plan
2. Other information that should be required to include in the Master Plan
3. Guidelines or standards for school districts to use in development and submittal of the facilities inventory required as a component of the Master Plan
4. A narrative describing how the FMP aligns with Priority 1 of the district's LCAP

1. Guidelines for school districts to use in the development of the Master Plan.

In May we will publish a comprehensive guide to best practices in facilities master planning, including models from other states that mandate, fund, or strongly support the development of FMPs. We hope this resource will be useful to CDE and OPSC as they develop guidance for LEAs that want to pursue a comprehensive facilities master plan that exceeds the minimum requirements set by Prop 2.

We understand that CDE and OPSC are committed to overhauling state guidance and encouraging best practices: The FMP guidance on CDE's website is woefully outdated—most of the manuals are more than 20 years old. The guidelines should provide a range of templates that mirror the broad range of resources and size of California's school districts. Importantly, the guidance should encourage districts to do comprehensive educational facilities master planning by providing tools they can use with or without hiring a consultant.

Finally, these guidelines should include components related to the challenges California districts are facing today: declining enrollment, extreme heat and other climate impacts, expansion of transitional kindergarten, adaptation to new learning environments, and aging buildings with outdated building systems. It should also include guidance for

incorporating stakeholder input and prioritizing facilities investments to promote efficiency and equity across a district.

2. Other information that should be required to include in the Master Plan

The biggest omission in Prop 2 / AB247 is any reference to facilities assessment as one of the required elements of a five-year FMP. CDE's own guidance states that "condition and adequacy of existing facilities" is central to facilities planning. While Prop 2 / AB 247 does not include facility evaluation or assessment as an element of the inventory or plan requirements, we believe the law leaves room for including such a requirement.

There is good reason to ensure that facilities assessment is required as part of the submitted five-year FMP: one of the rationales for facility master planning is to ensure that districts are identifying, planning for, and prioritizing upcoming needs. Every model framework for facilities master planning includes an assessment or evaluation component. For example, the CDE's guidance on facilities master planning includes an evaluation / assessment of existing facilities: "Part 2 of the long-range facilities plan involves preparing a comprehensive evaluation and report of the utilization and condition of the school facilities currently in the district" (1986). The California School Boards Association (CSBA) has a model policy on facility master planning that hundreds of California districts have adopted. [Policy 7110](#) includes assessment as a core component of a facilities master plan: Part 5 is the "Analysis of the safety, adequacy, and equity of existing facilities."

Districts are already completing the Facilities Inspection Tool (FIT) to be submitted with their School Accountability Report Card (SARC). However, the FIT is not submitted to OPSC or made readily available to the public. We do not believe it is too onerous to incorporate an assessment tool or report into the requirements for 5-year FMP under Proposition 2. The California State Auditor recently found that the FIT tool is often inadequate in documenting facilities deficiencies, and we understand that OPSC/DGS will be holding future meetings to discuss revising the FIT.

We would like to see OPSC bring forward for a future stakeholder discussion the inclusion of a facility evaluation / assessment component as part of the five-year FMP requirement. This could include a discussion of how OPSC might incorporate changes to the FIT and require that it (or an equivalent tool) be submitted to OPSC as part of meeting the five-year FMP requirement.

3. Guidelines or standards for school districts to use in development and submittal of the facilities inventory required as a component of the Master Plan.

In addition to lacking any component of evaluation and analysis, the facilities inventory does not reference key building systems. The inventory required under Prop 2 / AB 247 is fairly minimal, although it represents a major step toward generating centralized data on the size, age, and capacity of California's school facilities.

ATTACHMENT D

One of the most significant challenges facing many California schools is extreme heat and/or poor air quality, and the lack of adequate HVAC systems to keep classroom environments healthy and comfortable for learning. While we understand OPSC is reluctant to add a requirement that districts include a plan for extreme heat in their FMP, we think it is worth considering expanding the inventory requirement to include the presence and age of key building systems, in particular HVAC.

We would like to see OPSC bring forward to a stakeholder discussion the question of how we might include key building systems as part of the required inventory.

Additionally, we hope that the inventory submission in particular is structured in such a way that the data can be integrated into a statewide repository that can serve as a pilot for building a comprehensive dataset on California's schools, their ages, size, adequacy, and potential capital needs.

4. Narrative that describes how the FMP is consistent with the LCAP

We do not have a concrete suggestion for this item, but wanted to note that many districts satisfy LCAP Priority 1 by simply summarizing the macro results of their FIT reports. It seems clear that the legislative intent of this requirement is to ensure that facility assessments and deficiencies are considered as part of the FMP process and incorporated into the plan. We think this bolsters the importance of attention to our second point above: that the FMP should include an analysis of facilities assessment, deficiencies, and adequacy.

Thank you for considering bringing these suggestions back to the stakeholders for further discussion; we look forward to continued engagement on this important issue.

Sincerely,



Sara Hinkley, California Program Manager
hinkley@berkeley.edu

ATTACHMENT D

Via Email

April 25, 2025

Communications Team
Office of Public School Construction
OPSCCommunications@dgs.ca.gov

Re: Further Prop 2 Implementation Stakeholder Process Comments on Education Code § 17070.54(d), Facilities Master Plan Inventory Guidelines or Standards

Dear Communications Team,

[Clean Air Allies](#) is a nonprofit organization dedicated to improving indoor air quality (IAQ) in PK-12 schools as a matter of educational, environmental, and health import. These comments follow on our February 28, 2025 written comments.

1. A Facility Condition Assessment Requirement Encompassing Major Systems, Subsystems, or Components Should Be Included in the “Guidelines or Standards that School Districts Shall Use to Develop and Submit” the Inventory for the Five-Year School Facilities Master Plan.

We thank the Office of Public School Construction (OPSC) for confirming at the April 10, 2025 stakeholder meeting its position that it has authority to include elements *beyond those statutorily enumerated* in the “guidelines or standards that school districts shall use to develop and submit” the “inventory of existing facilities, sites, and property” for the Five-Year School Facilities Master Plan (FMP). ([Ed Code §§ 17070.54\(c\)\(1\), 17070.54\(d\)](#).)

Clean Air Allies writes to expand upon our prior feedback that the inventory “guidelines or standards” should include some form of facility condition assessment encompassing major systems, subsystems, or components.¹ While we appreciate that many school districts face resource constraints, it is unclear how an FMP lacking such an assessment would serve the core goals of facilities master planning, including needs assessment, appropriate project prioritization, and strategic resource deployment. As one expert has explained, “Long range planning can only be done by evaluating all the buildings used for educational purposes,” and for “each building,” its “general condition” and “all systems in the building … to determine their current condition and any need for improvement.” (Glen I. Earthman, *Planning Educational Facilities: What Educators Need to Know*, 6th ed., 2019, 75, 77.)

¹ Given apparent interest in fillable forms and templates, in our prior letter, we suggested that tools developed by OPSC for the School Facility Needs Assessment Grant Program might offer a potential model. We also argued that the Facility Inspection Tool (FIT) in its present form is not well-suited to this end, including due to its focus on (a) identification of urgent and emergency condition issues versus longer-term planning, and on (b) visual inspection by non-specialists versus a more probing inspection by persons with facilities expertise. (See [Ed Code § 17002\(d\)\(1\)](#) (the FIT “shall not require capital enhancements beyond the standards to which the facility was designed and constructed”).) Further, we noted that the California State Auditor has identified as yet unresolved deficiencies in its in-field use.

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We look forward to OPSC's further elaboration of its analysis of § 17070.54(d). In the meantime, below we offer additional support for including a facility condition assessment requirement in the FMP inventory "guidelines or standards."

a. Support from Existing California Department of Education (CDE) FMP Guidance.

According to CDE, a key benefit of an FMP is that it "organizes an inventory and appraisal of the condition and capacity of existing school facilities and school sites." Accordingly, an FMP "needs to be updated to reflect changing ... number and condition of facilities." (CDE, "[Essentials in School Facilities Planning: Facilities Master Plans](#)," Nov. 2018, 1-2.)

CDE also has stated elsewhere that a "long-range facilities plan involves preparing a comprehensive evaluation and report of the utilization and condition of the school facilities currently in the district." (CDE, "[Guide to Development of Long Range Facilities Plan](#)," 1986.)

b. Support from Other States.²

Arkansas requires six-year school district FMPs. ([Ark. Code Ann. § 6-21-806](#).) Regulations provide that they must include "accurate campus and building information including, but not limited to, campus grades, system condition assessment, building size, and other required information." ([Ark. Admin. Code § 4.03.11](#).) FMP training materials show that condition data on 11 systems and 37 subsystems is collected via a web-based form. (Ark. Div. of Public School Academic Facilities & Transp., "[2025 Preliminary Master Plan Update and 2026 Master Plan](#)," Sep. 19, 2024, 13.)

Colorado's school facilities funding program BEST requires "[documentation of appropriate due diligence to identify the deficiencies and arrive at the solutions identified](#)," which may include an FMP. BEST's FMP guidelines list an "assessment of all facilities," including "condition," as an essential component of an FMP. One of the primary functions of an FMP is an "assessment of facility inventory for condition and educational suitability, and a short term and long term plan for addressing deficiencies identified in the assessment," not merely a "project plan" or a "wish list from the administration and community." (Co. Dept. of Ed, Best Div. of Public School Capital Construction, "[Public School Facilities Master Plan Guidelines](#)," Nov. 15, 2018, 3.)

A four-year "District Facilities Plan" is mandatory for participation in funding from the **Kentucky** School Facilities Construction Commission. ([KRS § 157.622](#); [702 KAR 4:180](#).) Agency standards require that it include a professional "evaluation of existing buildings to determine building physical condition," including "all primary building systems noting the types, their age and condition." (Ky. Bd. of Ed, "[Kentucky School Facilities Planning Manual](#)," June 2008, § 102.1.)

In **Massachusetts**, the Massachusetts School Building Authority (MSBA) may require submission of an "educational facilities capital plan" as a condition of state funding. ([963 CMR 2:05\(7\)](#).) It may also award additional reimbursement based on adoption of maintenance and capital planning best practices. ([963 CMR 2:10\(3\)\(b\)\(3\)](#).) MSBA best practices guidance states

² This section is based on a survey of readily available information and is not intended to be exhaustive. States such as [Ohio](#), [Rhode Island](#), and [Wyoming](#), where there is substantial state agency involvement in school facility master planning, are not included, even though a facility condition assessment, including of building systems, subsystems, or components, is a key component of such planning and associated tools have been developed. Wyoming is of particular interest in this respect.

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that “collecting building condition information is necessary to … plan maintenance and capital projects, set priorities and estimate costs.” This information is collected via an inventory:

An inventory is a reliable count of each of the school district’s facilities and should contain basic information on (1) the facility’s condition, and (2) the various building components and equipment and basic information of their condition. Information in the inventory should include, but not be limited to, the following:

- A count of each facility, its age, square footage, and a basic building history describing any upgrades, major repairs, renovations, and/or additions.
- For each facility, a listing of the building components, their condition and functional performance, as well as the equipment’s age, usage, location, warranty information, and model type.

(MSBA, “[Maintenance and Capital Planning Best Practices](#),” Apr. 25, 2011, 3.)

Since the early 2000s, **New Jersey** has required school districts to prepare, then amend every five years, “long-range facilities plans” (LRFPs). ([N.J.S.A. 18A:7G-1](#); [N.J.A.C. 6A:26-2.1](#).) By regulation, the LRFP must include an “inventory of all building systems within each facility,” a “determination of the life expectancy of all building systems,” and a “determination of any building system deficiencies in each school facility and the required remediation.” ([N.J.A.C. 6A:26-2.2\(a\)\(6-8\)](#).) The facility and systems inventory is the “foundation to complete other LRFP tasks.” (NJ Dept. of Ed, “[LRFP and Projection Application Tracking System, Vol 1, Part A: Introduction and Getting Started](#),” 2005, A.4.)

In **New Mexico**, school districts must have current five-year FMPs as a condition of state capital outlay funding. ([NMSA 1978, § 22-24-5\(B\)\(11\)\(d\)](#).) Per agency guidance, required “facility inventory” components include a “Facility condition index (FCI)” and a “weighted New Mexico Condition Index (wNMCI).” (NM Public School Facilities Authority, “[Facilities Master Plan Checklists and Guidelines for Preparing District Plans](#),” 2023, 14.) These inputs are consistent with the FMP’s function to “identify needs and wisely allocate capital resources.” (NM Public School Facilities Authority, “[Facility Master Plan Components and Guidance](#),” Oct. 2016, 8, see also 34-39 (sample facility inventory data).)

New York school districts are required to have and regularly update a “Five-Year Capital Facilities Plan,” including a “districtwide building inventory” that addresses the “probable useful life of each building and its major subsystems” and the “need for major system replacement and repairs, and maintenance.” ([8 NYCRR 155.1\(a\)\(4\)](#).) “An up-to-date Five-Year Plan will identify the current condition of the district’s facilities and prioritize the necessary improvements for each facility.” (NY State Dept. of Ed, “[Clarification on 5 Year Plan Summary](#),” updated Jun. 11, 2009.)

Oregon requires facility assessments and “long-range facilities plans,” good for four years, as a condition of eligibility for state capital improvement matching funds. ([ORS 286A.801\(2\), 326.125\(1\)\(d\); OAR 581-027-23, 581-027-0035, 581-027-0040](#).) An associated RFP template created by the Oregon Department of Education (ODE) explains that the facility assessment, which includes a building and building systems inventory, is to be “used to develop, and be incorporated into” the long-range facility plan. (ODE, “[Template RFP for Facility Assessment and Long-Range Facility Planning Consultants](#),” n.d., 5, 6.)

For all publicly financed school capital improvement projects on or after November 1, 2021, **Texas** regulations require a five-year project-level “long-range facility plan,” including “the age and condition of all buildings and systems at the project campus.” ([19 Tex. Admin. Code § 61.1040\(d\)\(1\)](#); Tex. Ed Code §§ [7.061](#), [46.002](#), [46.008](#).)

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To be considered for state construction funding, **Washington** school districts are required by regulation to develop a “Study and Survey” master-planning document. ([WAC 392-341-020](#); [RCW 28A.525.020](#).) It must include an inventory of existing school facilities, encompassing “building systems, subsystems, and components.” ([WAC 392-341-025](#); Washington Office of Superintendent of Public Instruction, “[School Facilities Manual](#),” Apr. 2011, 82, 85-86, 95 (sample form); Washington Office of Superintendent of Public Instruction, “[School Construction Assistance Program: Summary Handbook](#),” 2021, 7.)

c. Support from Existing California School District FMPs.

We note that California school district FMPs often already treat facility condition assessment as an integral part of the master-planning process. Some examples include the FMPs for [Stockton USD](#) (2024); [San Francisco USD](#) (2023); [Vista USD](#) (2023); [Del Norte USD](#) (2022); [Inglewood USD](#) (2022); [Sausalito Marin City SD](#) (2020); and [Baldwin Park USD](#) (2018).

We hope that the foregoing helps to demonstrate that a facility condition assessment encompassing major systems, subsystems, or components is widely regarded as an integral part of FMP inventorying of existing facilities, and has been deployed in a broad range of schools.

We thank OPSC for its openness to stakeholder feedback and for considering these comments.

For any questions, please contact junelle@cleanairallies.org.

Very truly yours,



JuNelle Harris
Co-Founder
Clean Air Allies

ATTACHMENT D



April 25, 2025

Communications Team
Office of Public School Construction (OPSC)
707 Third St, 4th Floor
West Sacramento, CA 95605

**RE: FEEDBACK ON TOPICS PRESENTED DURING APRIL 10, 2025 STAKEHOLDER MEETING FOR
IMPLEMENTATION OF PROPOSITION 2 FOR THE SCHOOL FACILITY PROGRAM**

To Whom it May Concern:

Hancock Park & DeLong, Inc. appreciates the opportunity to continue providing feedback regarding the topics presented during the eighth Proposition 2 Stakeholder meeting held on April 10, 2025. Below is a summary of our comments and concerns:

○ **Interim Housing and Natural Disaster Assistance**

- Proposed regulations:
The definition for Interim Housing should not be limited to only those circumstances where students are temporarily housed due to modernization projects or as a result of natural disaster, as it is also used commonly to temporarily house students in other situations as well (i.e., facility hardships, students awaiting new construction, etc.). Limiting the definition of Interim Housing to only those 2 situations could significantly impact other SFP Regulation sections.

○ **Five-Year Master Plan**

- We urge OPSC to reconsider the interpretation that the five-year facility master plan must be updated annually, or have 4 years remaining on the plan after board approval. To require an annual update is overly prescriptive and alters the very essence of a five-year plan – an annual update requirement would change the master plan from a “five-year plan” to an annual plan, which alters the statutory requirement.

It is a general and long-standing capital planning practice to develop long-term facilities master plans because those master plans require several years to be implemented and realized. Consider, for example, the five-year enrollment projections that inform new construction

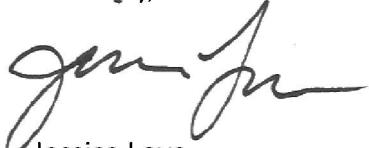
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eligibility under the School Facility Program – five-year projections are needed to account for the long-term planning/design, agency approval and construction schedules associated with new construction and the associated housing of new students. Master planning under the School Facility Program should be afforded the same long-held industry standard. We encourage OPSC to allow facility master plans to be considered valid for the full five years upon a district's board approval, and to then require an updated master plan thereafter.

- We appreciate a pragmatic approach to the requisite facility inventory and enrollment data and appreciate OPSC being open to accepting the existing Forms SAB 50-01, SAB 50-02 and/or SAB 50-03, as a snapshot in time. Flexibility to provide the data in another format is also requested. We also appreciate the flexibility in the format permitted for the capital planning budget.

Please let us know if you have any questions or would like additional information regarding these topics. We look forward to continuing conversations as these topics progress with development.

Sincerely,



Jessica Love

Hancock Park & DeLong

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April 25, 2025

Rebecca Kirk, Executive Director
Office of Public School Construction
Department of General Services
707 Third St
West Sacramento, CA 95605

Re: Proposition 2 Implementation Stakeholder Meeting #8

Dear Ms. Kirk,

On behalf of the Los Angeles Unified School District (Los Angeles Unified), we appreciate OPSC's Proposition 2 stakeholder engagement and welcome the opportunity to provide input on the proposed amendments to the Schol Facility Program in response to Proposition 2.

The comments and recommendations provided below correspond to the topics raised and materials provided for the April 10, 2025, Implementation Stakeholder Meeting #8.

Interim Housing and Natural Disaster Assistance

In response to OPSC's request for stakeholder feedback regarding the "any other assistance" provision in Education Code section 17075.20(e), Los Angeles Unified suggests that allowable costs include the *contents* of interim buildings, which may include furnishings, equipment, and other necessary items required to support educational operations during disaster recovery.

Five-Year Master Plan

Stakeholder Feedback #1 – OPSC has stated that review by another agency is not required prior to submission of a master plan. However, Los Angeles Unified encourages OPSC to make technical assistance available to school districts that seek to have their master plans reviewed prior to

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submission to their local governing boards for approval. This support would be particularly important when a district is submitting a master plan for the first time, to help ensure the completeness of the plan and to avoid missing elements.

Stakeholder Feedback #2 – OPSC's response to Stakeholder Feedback #2 asserts that a master plan must have at least four years remaining on its term at the time of funding application. This interpretation introduces a new requirement not supported by the plain language of the statute, effectively mandating that school districts must revise their master plans each year an application is submitted. Education Code requires only the submission of a five-year master plan or an updated five-year master plan; it does not require that the plan project five years forward from the date of application or maintain a minimum number of four years remaining. Accordingly, Los Angeles Unified urges OPSC to align its interpretation of Education Code section 17070.95 with the statutory language, and to require only that school districts submit a five-year facilities master plan or an updated five-year facilities master plan.

Sincerely,



Sasha Horwitz
Legislative Advocate
Los Angeles Unified School District

ATTACHMENT D

May 23, 2025

Ms. Rebecca Kirk
Executive Officer, Office of Public School Construction
707 Third Street
West Sacramento, CA 95605

Subject: Proposition 2 Stakeholder Comments – Various Items

Dear Ms. Kirk:

The Coalition for Adequate Housing (CASH) appreciates the opportunity to provide feedback on the implementation of Proposition 2, the 2024 state school bond. This letter addresses two items from recent stakeholder meetings, including:

- Proposed Regulatory Amendments for General Updates
- Five-Year Master Plan

Proposed Regulatory Amendments for General Updates: Increases to Pupil Grants

On March 13, the Office of Public School Construction (OPSC) presented proposed regulatory amendments for general updates to the School Facility Program (SFP) regulations. CASH is generally comfortable with these proposals, with the exception of one item: a proposed amendment to clarify that “increases to the pupil grant request in the Form 50-04 shall, in most cases, require the withdrawal and resubmittal of the funding application.” The proposal indicates that a pupil grant increase would constitute “line-jumping” that would provide an unfair advantage over other school districts.

CASH recommends that the regulations should not require withdrawal and resubmittal of an application due to a pupil grant increase request. Under current practice, schools are required to demonstrate eligibility at the time that the application is processed, which often occurs at least two or three years after the application was initially submitted. If districts are required to rejustify eligibility and potentially adjust pupil grants *downward* due to changing conditions between application submittal and processing, they should also be permitted to adjust pupil grants *upward* when justified by the eligibility at the site. This can be done without changing the project scope reflected in the plans that have been approved by CDE and DSA, and allows districts to access the pupil grants to which they are entitled. CASH does not agree that this entitlement constitutes line-jumping. If shovel-ready projects were processed for funding within 90 days of submission, there would be no need to make adjustments to pupil grants after the application is submitted. This 90-day processing would also allow the State to catch up on funding the accumulated backlog of school construction projects that have been submitted and are awaiting processing and funding, which is worth approximately \$5 billion.

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Five-Year Master Plan: Deferred Maintenance Plan Verification

CASH previously provided feedback on the Five-Year Master Plan requirement related to the duration of the plan. We wanted to provide additional thoughts on meeting the Deferred Maintenance Plan requirement.

Per Proposition 2, one of the requirements that must be included in the Master Plan is the district's "certified deferred maintenance plan pursuant to Section 17070.75." As OPSC's proposal indicates, Proposition 2 did not make changes to E.C. Section 17070.75, which requires districts to create and contribute funds to a routine restricted maintenance account. OPSC proposes that "a district could submit a URL link to the locally approved maintenance plan or to the local board agenda where it was approved to demonstrate compliance."

CASH concurs that submitting a URL link is an efficient approach to complying with this requirement for many districts. However, after hearing from our members from school maintenance departments, particularly those from small rural schools, *CASH recommends* that in addition to the URL link OPSC allow other options for verification, such as hard copy submittal.

We appreciate the spirit of collaboration and openness that your team has shown during this process. We thank you for the opportunity to provide these thoughts for your consideration.

Sincerely,



Rebekah Kalleen
CASH Legislative Advocate



Ian Padilla
CASH Legislative Advocate

cc: Michael Watanabe, Deputy Executive Officer, Office of Public School Construction
Brian LaPask, Chief of Program Services, Office of Public School Construction



June 16, 2025

Juan Mireles
California Department of Education
1430 N Street #5901
Sacramento, CA 95814

Rebecca Kirk
Office of Public School Construction
707 Third Street, Fourth Floor
West Sacramento, CA 95605

Ida Clair
Division of the State Architect
1102 Q Street, Suite 5100
Sacramento, CA 95811

Re: Proposition 2 Guidance and Considerations for Implementation

Children Now respectfully writes to you to ask that your agencies ensure the implementation of Proposition 2 (AB 247) upholds its vision for safe, healthy, sustainable, and resilient school facilities in every California community. As the climate warms and schools are faced with both extreme weather and aging infrastructure, it is crucial that modernization efforts and funding are aligned with the state's climate and educational goals: our students need safe, clean, and resilient learning environments to thrive.

Children Now is a non-partisan, whole-child research, policy development and advocacy organization dedicated to promoting children's health, education, and well-being in California. The organization also leads The Children's Movement of California, a network of over 5,700 direct service, parent, youth, civil rights, faith-based and community groups dedicated to improving children's well-being. Our work on children's environmental health and justice focuses on reducing kids' exposure to toxics like lead and wildfire smoke, which are exacerbated by climate change.

We so appreciate the opportunity to engage in the stakeholder process for Proposition 2 and were encouraged to hear the Office of Public School Construction (OPSC) indicate at the April 10th, 2025 stakeholder meeting that "*OPSC and CDE intend to include information regarding climate resilience as a component of these guidelines for districts' consideration in developing their Master Plans.*"

SEC. 5., Section 17070.54 (c) of California Education Code states "**The school facilities master plan shall include, but is not limited to, all of the following information:**

- (1) *An inventory of existing facilities, sites, and property pursuant to subdivision (d).*
- (2) *Existing classroom capacity, as determined pursuant to Sections 17071.10 and 17071.25.*
- (3) *Projected enrollment growth for the applicable school district over the next five years, accounting for growth pursuant to Sections 17071.75 and 17071.76.*
- (4) *A capital planning budget outlining the applicable school district's projects.*
- (5) *The financing and other funding sources that would be used to support the acquisition of the applicable schoolsite, new construction project, modernization project, and lead testing and remediation projects.*
- (6) *Verification of the applicable school district's current assessed value from the appropriate local government entity that collects and maintains this information.*
- (7) *The school district's deferred maintenance plan certified pursuant to Section 17070.75.*
- (8) *A narrative describing how the school facilities master plan is consistent with the goals, actions, and services identified in the school district's local control and accountability plan for the first state priority, as described in paragraph (1) of subdivision (d) of Section 52060, as it relates to school facilities.*

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With the recognition in statute that allows for expanding on what is required of school facilities' master plans, we respectfully call on the California Department of Education (CDE), Office of Public School Construction (OPSC), and Division of the State Architect (DSA), to embed the following recommendations:

- **Incorporate climate resilience into Facilities Master Plan (FMP) guidance and templates.** Add sections that guide districts in conducting an overall climate risk assessment, as well as assessing and addressing how to take action on energy resilience and electrification, indoor environmental quality, tree canopy cover, and schoolyard greening.

While Proposition 2 includes language about eligible spending for items that may mitigate climate risks (e.g., shading, updating air-conditioning to maintain safe indoor air temperatures), climate risk and facilities assessments are not included in the discussion of facilities master planning. Assessment is a core function of facilities master planning, and Education Code 17070.54(c) provides an opportunity for additional requirements. An example of how this could be included is to add these items as checkboxes on the facilities master plan submission:

- Check the climate risks that the local education agency (LEA) has identified. The list of options could include inadequate ventilation during wildfires, stormwater flooding, sea level rise, wildfire, and excessive heat (with some measure, e.g., the [CDPH guidance](#)).
- Indicate whether the FMP includes a plan for addressing those risks through energy resilience, electrification, and decarbonization strategies (e.g. onsite renewable energy and battery storage; use of electric appliances and shift to fleet electrification with on-site charging; HVAC systems and indoor air quality measures).
- A review of projected impacts of climate change over the next twenty years included in the narrative in Sec. 17070.54 (a)(8), and any plans to update solar, battery storage, and electric HVAC systems accordingly.

While not mandated, these inclusions will encourage forward-thinking planning and ensure Prop. 2 investments support state energy and climate objectives.

- **Collect baseline data on key climate-readiness indicators.** Use FMP submissions per Section 17070.54 (d) or supplemental forms to collect and publicly report data that will support statewide planning, resource targeting, and emergency preparedness such as:
 - Onsite renewable energy and battery storage;
 - Use of electric appliances and shift to fleet electrification with on-site charging;
 - HVAC systems and indoor air quality measures; and
 - Tree canopy, shaded outdoor spaces, & non-reflective surface materials with low heat absorption.

We hope that this letter provides further guidance and suggestions on how to follow through on OPSC and CDE's intention to include information regarding climate resilience as a component of FMP guidelines, so that we can continue building a public school system that is modern, resilient, and ready for the future.

Sincerely,



Kelly Hardy, Senior Managing Director, Health & Research
khardy@childrennow.org



Colleen Corrigan, Senior Health Policy Associate
ccorriigan@childrennow.org

ATTACHMENT D



May 16, 2025

Juan Mireles
California Department of Education
1430 N Street #5901
Sacramento, CA 95814

Rebecca Kirk
Office of Public School Construction
707 Third Street, Fourth Floor
West Sacramento, CA 95605

Ida Clair
Division of the State Architect
1102 Q Street, Suite 5100
Sacramento, CA 95811

Re: Proposition 2 Guidance and Considerations from the Climate Ready Schools Coalition

As organizations committed to advancing student health, equity, and climate resilience, we ask you to ensure that the implementation of Proposition 2 (AB 247) upholds the vision for safe, healthy, sustainable, and resilient school facilities in every California community. With rising temperatures, extreme weather, and aging infrastructure, the opportunity and responsibility to align school modernization with the state's climate and educational goals has never been greater. Proposition 2 offers a generational opportunity to meet this moment.

To realize this vision, we urge you to take a whole systems approach to facilities management and planning by aligning to key accountability frameworks (e.g. Local Control and Accountability Plans, Basic Conditions Report, use of the Facilities Inspection Tool (FIT), etc.). By embedding these elements, California can strengthen transparency, streamline efforts, and maximize the long-term benefits of school infrastructure investments. Furthermore we believe that data collection is a critical component of ensuring that school infrastructure remains safe, functional, and resilient. We recommend that California establish a transparent, well-maintained inventory and database of school buildings and grounds and their condition. This database will support ensuring that resources are directed where they are needed most and that every school is equipped to serve its students effectively. Lastly, we believe it is critical to elevate four key areas of facilities master planning to ensure that climate readiness is built into the implementation of Proposition 2: i) Energy Resilience, Electrification, and Decarbonization, ii) Indoor Environmental Quality, iii) Schoolyard Greening, and iv) Climate Risk Assessment.

We respectfully call on the California Department of Education (CDE), and Department of General Services' (DGS) Offices and Divisions (Office of Public School Construction (OPSC) and Division of the State Architect (DSA), to embed the following into Proposition 2 implementation:

- **Incorporate climate resilience into Facilities Master Plan (FMP) guidance and templates.** Add sections that guide districts to do an overall climate risk assessment, as well as assess and address how to take action on energy resilience and electrification, indoor environmental quality, tree canopy cover and schoolyard greening.
- **Collect baseline data on key climate-readiness indicators.** Use FMP submissions or supplemental forms to collect and publicly report data that will support statewide planning, resource targeting, and emergency preparedness, such as:
 - Onsite renewable energy and battery storage;
 - Use of electric appliances and shift to fleet electrification with on-site charging;
 - HVAC systems and indoor air quality measures; and
 - Tree canopy coverage, shaded outdoor spaces, and non-reflective surface materials with low absorption of heat.

Additional details for the above recommendations are available in our more detailed guidance: [Proposition 2 Implementation Guidance from the Climate Ready Schools Coalition](#).

We also urge the CDE and DGS (including OPSC and DSA) to support the following efforts:

- **Issue joint guidance on eligible climate-resilient investments.** Clarify how schools can use Proposition 2 funds for projects that align with state climate goals, such as HVAC upgrades, solar and battery storage, electrification, shade structures, schoolyard forests and green schoolyards. Provide guidance on how districts can leverage complementary funding sources such as federal energy tax credits and CalSHAPE.
- **Provide technical assistance and model resources to districts to help incorporate climate resilient practices in their FMP and facilities projects.** Develop and share best practices, example FMP language, and planning tools that help districts incorporate climate-resilient strategies, and coordinate across CDE, DSA and OPSC, to reduce confusion and streamline support for local education agencies.

This is a pivotal moment to transform our school infrastructure to meet the climate challenges of today and tomorrow. We urge your agencies to ensure that every dollar spent through Proposition 2, as well as any investment by districts to modernize or create new facilities, builds a public school system that is modern, resilient, and ready for the future.

Sincerely,

Below signed members of the Climate Ready Schools Coalition:

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Andra Yeghoian CIO Ten Strands Co-Lead Climate Ready Schools Coalition	Jonathan Klein Co-Founder and CEO UndauntedK12 Co-Lead Climate Ready Schools Coalition	Sara Hinkley California Program Manager Center for Cities + Schools
Sarah Matsumoto Director of Policy Green Schoolyards America	JuNelle Harris Co-Founder California Alliance for Clean Air in Schools	Mary Hillemeier Policy Associate TreePeople
Shereen Walter President California State PTA	Alexa Norstad Executive Director Center for Ecoliteracy	Mitch Steiger Legislative Representative California Federation of Teachers
Julia Sebastian Climate Policy Director Jobs with Justice San Francisco	Serena Pelka Policy Advocate Climate Action Campaign	Mary Ruppenthal Education Market Sector Leader HED
Vanessa Forsythe Leadership Council Member California Nurses for Environmental Health & Justice	Vanessa Aramayo CEO & President Alliance for a Better Community	Alvin Lee Executive Director GENup (Generation Up)
Reilly Loveland Associate Director New Buildings Institute	Richard Burke Chapter Leader Elders Climate Action Southern California	Janet Perlman MD MPH Physician (Individual)

Proposition 2 Implementation Guidance from Climate Ready Schools Coalition Partners

Spring 2025



Purpose and Overview

The [California Climate Ready Schools Coalition](#) is working to ensure that the implementation of [Proposition 2 \(AB 247\)](#) does not water down any of the hard-fought wins for climate resilience and energy efficiency incentives that were included in its passage. Ultimately the issues elevated in this guidance are the climate ready areas that we believe must be addressed in the implementation of Prop 2 and school district facilities master planning.

The intended audiences for this guidance include but are not limited to the following:

- State agencies involved in Prop 2 implementation (California Department of Education, and the Department of Government Services' Office of Public School Construction and Division of the State Architect)
- School district leadership with facilities oversight (administrative cabinet and board)
- Consultants for school district facilities master plans

The document is organized into three sections that can be navigated using the bookmarks in the table below.

Pages	Section	Description
2	Executive Summary	One page summary of the guidance
3	Guidance and Consideration for Data Collection, and Alignment with Educational Priorities and Accountability Efforts	A call to implement Proposition 2 in a way that integrates planning, accountability, and data systems to ensure school infrastructure supports educational goals, climate readiness, and equity
4-17	Climate Ready Facilities Issues Considerations and Guidance	Considerations and guidance for four issues that support addressing climate readiness in a facilities master plan: (1) energy resilience, electrification, and decarbonization, (2) indoor environmental quality, (3) schoolyard greening, and (4) climate risk assessment. <i>(For each issue there is a definition, considerations around the connection to climate resilience and already existing policy, and guidance on how to connect this issue to facilities master planning.)</i>

I. Executive Summary

Proposition 2 (AB 247) offers a historic opportunity for California to invest in K-12 school facilities that are not only safe and modern but also climate resilient. As communities across the state face increasing threats from extreme heat, wildfire smoke, flooding, and energy disruptions, school infrastructure must be reimaged to support student health, learning, and equity in a rapidly changing environment. This document presents guidance and considerations for aligning Prop 2 investments with climate resilience goals—focusing on practical, scalable strategies such as heat mitigation, indoor air quality, energy efficiency, renewable energy, green infrastructure, and schoolyard greening.

Developed with input from experts in sustainability and resilience, education, and school facilities planning, this guidance is written for state agencies implementing Prop 2—including the California Department of Education (CDE), and Department of Governmental Services’ Office of Public School Construction (OPSC) and Division of the State Architect (DSA)—as well as school district leaders responsible for facilities oversight and the consultants who support facilities master plans.

The guidance starts with recommendations for taking a whole systems approach to facilities management and planning by aligning to key accountability frameworks (e.g., Local Control and Accountability Plan, basic conditions report, use of the Facilities Inspection Tool). By embedding these elements, California can strengthen transparency, streamline efforts, and maximize the long-term benefits of school infrastructure investments. Furthermore, the guidance highlights that data collection is a critical component of ensuring school infrastructure remains safe, functional, and resilient. The recommendation for data is that California establish a transparent, well-maintained inventory and database of school facilities and their condition. This database would serve as a powerful tool for both local education agencies (LEAs) and the state, ensuring that resources are directed where they are needed most and that every school is equipped to serve its students effectively.

The final section includes guidance for four facilities issues that are related to planning and implementing green building and grounds practices with climate resilience embedded: (1) energy resilience, electrification, and decarbonization, (2) indoor environmental quality, (3) schoolyard greening, and (4) climate risk assessment. For each issue there is a definition, considerations around the connection to climate resilience and already existing policy, and guidance on how to connect this issue to facilities master planning.

The overall intention of these considerations and guidance strategies is to help state agencies, districts, and partners turn climate goals into capital project decisions—ensuring that investments made today will serve California students for decades to come.

II. Guidance and Considerations for Data Collection and Alignment with Educational Priorities and Accountability

The California Climate Ready Schools Coalition believes that a whole systems approach to facilities management is essential to ensuring that school infrastructure supports both student success and climate resilience. As the state implements Proposition 2, it is critical that facilities planning aligns with broader educational goals and prioritizes safe, healthy, and sustainable learning environments.

To achieve this, we urge decision-makers to integrate key accountability frameworks, including the Local Control and Accountability Plan to align facilities planning with educational priorities and the basic conditions report for the California School Dashboard to ensure we are harnessing the objectives of these accountability mechanisms. While the Facilities Inspection Tool (FIT) cannot and never should be a replacement for a facilities master plan, we recommend aligning the facilities master plan process and template to existing and future facilities compliance tools such as the FIT. We would also like to see a robust community engagement process that empowers stakeholders to shape learning environments. By embedding these elements, California can strengthen transparency, streamline efforts, and maximize the long-term benefits of school infrastructure investments.

Additionally, we believe data collection is a critical component of ensuring school infrastructure remains safe, functional, and resilient. This is not about creating unnecessary burdens for districts but about equipping the state with essential information to better support local education agencies. AB 247 includes a requirement for submitting a comprehensive five-year school facilities master plan with the inclusion of an inventory of existing facilities, classroom capacities, projected enrollment growth, capital planning budgets, and deferred maintenance plans. This data is the start of establishing a standardized baseline of facility (both buildings and grounds) conditions across the state. By gathering baseline data on all school facilities, the state can more effectively respond to emergencies, strategically allocate bond funding, and assist districts in long-term planning. While buildings and school grounds are owned by local jurisdictions, the state has a constitutional responsibility to protect students' rights—and in times of crisis, it may need to intervene with support services. Without reliable data, the state is operating in the dark, unable to provide timely and targeted support.

Examples of school facilities data from other states include the following: [Florida Inventory of School Houses](#), [Oregon School Facilities Database](#), [Maine School Building Inventory Data](#)

A transparent, well-maintained inventory and database of school facilities and their condition would serve as a powerful tool for both LEAs and the state, ensuring that resources are directed where they are needed most and that every school is equipped to serve its students effectively.

III. Climate Ready Facilities Issues Considerations and Guidance

Members of the [California Climate Ready Schools Coalition](#) have developed guidance for a number of issues related to the aspects of green building and grounds practices that are most pertinent to address climate readiness in California TK–12 school facilities.

Green building and grounds practices involve designing, constructing, and operating buildings and school grounds to be environmentally responsible and resource efficient. These practices reduce energy and water use, minimize waste, improve air quality, and support healthier, more resilient infrastructure. In a changing climate, green buildings help lower carbon emissions through energy-efficient systems, renewable energy, and sustainable materials. Green school grounds designed using nature-based solutions manage stormwater with swales, cool the urban heat island with shade trees, and protect children from air pollution with vegetative buffers. Green school buildings and grounds are also designed to withstand extreme weather—using features like high-performance insulation, reflective roofs, smart water systems, and strategically placed topography and trees to stay safe and comfortable during heat waves, floods, or wildfires. By reducing exposure to toxins, extreme temperatures, and poor air quality, green buildings and grounds create healthier environments for students and school communities. These benefits make green building and nature-based solutions an essential strategy for climate mitigation and adaptation across schools and communities.

As climate events become more frequent, climate-resilient green building and grounds practices are an investment in the future, ensuring that our infrastructure can adapt to shifting conditions while improving both environmental sustainability and human well-being. This guidance includes a deeper dive on four climate ready facilities issues that are most relevant to Prop 2 implementation. For each issue there is a definition, considerations around the connection to climate resilience and already existing policy, and guidance on how to connect this issue to facilities master planning. *Use the bookmarks below to navigate to each issue.*

- [Issue 1: Advancing Energy Resilience, Electrification, and Decarbonization in Schools](#)
- [Issue 2: Indoor Environmental Quality](#)
- [Issue 3: Schoolyard Greening](#)
- [Issue 4: Climate Risk Assessment](#)

ISSUE 1: Advancing Energy Resilience, Electrification, and Decarbonization in Schools

Energy resilience refers to a school's ability to maintain power during disruptions through on-site systems like solar, batteries, and microgrids. Electrification replaces fossil fuel systems with electric alternatives, while decarbonization reduces greenhouse gas emissions through energy efficiency and clean energy use. Together, these strategies enable schools to operate safely during emergencies, lower energy costs, reduce pollution, and serve as resilience hubs for communities.

A) Why energy resilience, electrification, and decarbonization in schools matters in a changing climate

As California faces an increasing number of climate-related disruptions—extreme heat, wildfires, smoke, and power outages—schools must modernize facilities to ensure safety, continuity of learning, and alignment with state climate goals. Energy resilience, electrification, and decarbonization are central to this effort.

Upgrading schools to use clean electricity—like heat pumps, electric water heaters, and induction stoves—reduces emissions, protects indoor air quality, and provides reliable power during outages. These investments ensure safer, healthier campuses, especially in underserved communities most at risk from climate impacts. Modern, efficient, electric systems support academic success and community well-being, while helping California meet its climate goals.

B) What the law already recommends for energy resilience, electrification, and decarbonization

There are a number of past and already existing mandates, expectations, and funding programs regarding energy resilience, electrification, and decarbonization in California's TK-12 schools:

- Title 24 of the California Code of Regulations includes energy efficiency and carbon reduction requirements for school construction and modernization.
- California Air Resources Board's [2022 Scoping Plan](#) identifies electrification and decarbonization of schools as essential to achieving carbon neutrality.
- Prop 39 (historical) funded energy efficiency improvements in schools.
- CalSHAPE supports adoption of electric HVAC and ventilation systems.
- California has also set a statewide target of [carbon neutrality by 2045](#).

C) What Proposition 2 authorizes for energy resilience, electrification, and decarbonization

Proposition 2 provides clear authority for state funds to support energy resilience, electrification, and decarbonization:

- Sections 17072.35(a) and 17074.25(a)(1) allow grants to be used for efficient energy use, indoor air quality, shading, and adapting to rising temperatures.

- Section 17074.25(a)(1) allows for modernization funds to be used for design, materials, and construction to support state energy goals, create outdoor learning spaces, or provide shade and protection from rising temperatures, including through the use of natural elements.
- Section 17077.35 allows up to a 5 percent grant adjustment for energy efficiency and pollution reduction projects—including electric HVAC, water heating, onsite renewables, battery storage, microgrid controllers, and more.

D) Recommendations for including energy resilience, decarbonization, and electrification in state regulations and guidance

AB 247 and Proposition 2 specifically name “advancing state energy goals” as an allowable use of dollars which, as stated above, includes decarbonization and electrification. Though not required by law, OPSC, in partnership with DSA and CDE, should provide clear guidance and tools for districts that want to incorporate energy resilience, electrification, and decarbonization both in the facilities master plans and construction and modernization plans for individual sites.

The Office of Public School Construction, with the Division of the State Architect, and the California Department of Education, should initiate the following:

- Collect optional data on electric and energy-resilient systems in new and existing facilities. Though it is not yet required in California, other states have begun this type of data collection, and in learning from their best practice, it is clear that such a collection gives the state much better information about the resilience of school buildings and grounds both to protect the health and safety of children and to act as community resilience centers in times of emergency.
- Provide guidance on planning and funding sources (e.g., Inflation Reduction Act tax credits, direct allocation funding—past Prop 39 example)
- Develop templates for incorporating these strategies into project plans

While we have shared an initial list of resources (copied below), we stand ready to support OPSC, DSA, and CDE in identifying actionable resources to support districts in planning.

- [Climate Adaptation and Resilience at California’s K-12 Schools: Actions and Recommendations for State and District Leadership](#) provides specific recommendations to district leaders to address climate impacts in school building and ground design.
- [CA Data Initiative for Environmental and Climate Action in TK-12 Schools](#) provides localized data to allow district leaders to better understand and plan for environmental and climate-related data projections over the course of four decades.
- [HVAC Choices for Student Health and Learning](#) provides district leaders with specific recommendations in selecting HVAC systems that advance student health and safety.

- [Decarbonization Roadmap for School Building Decision Makers](#) provides a guide for school leaders to pursue healthy, efficient, carbon neutral school design, construction, and operation.

E) Considerations and guidance for facilities master plan developers to use for including energy resilience, electrification, and decarbonization

We recommend that districts working on a facilities master plan (FMP) include the following aspects into their FMP:

- A review of [projected impacts of climate change](#) over the next twenty years
- Inclusion of energy resilience, electrification, and decarbonization strategies
- Plans for including systems such as solar, battery storage, and electric HVAC

While not mandated, these inclusions will encourage forward-thinking planning and ensure Prop 2 investments support state energy and climate objectives.

ISSUE 2: Indoor Environmental Quality (Including Temperature)

Indoor environmental quality (IEQ) refers to the conditions of the indoor environment in buildings, including factors such as air quality, lighting, temperature, acoustics, and humidity, which directly impact the health, comfort, and well-being of the people inside.

A) Why indoor environmental quality in schools matters in a changing climate

In a changing climate, IEQ plays a critical role in protecting students and staff and maintaining healthy, productive learning environments, especially during climate events like heat waves or smoky air from wildfires. Good IEQ ensures that schools have proper ventilation, clean indoor air, and temperature regulation, helping to minimize the health impacts of outdoor air pollution, extreme heat, and poor indoor air quality. Upgrading HVAC systems, using nontoxic materials, and incorporating green building features such as natural lighting can drastically improve air quality and thermal comfort, reducing the risk of respiratory issues and heat-related illness. During emergencies like wildfire smoke, IEQ measures, like air filtration and cooling systems, allow schools to remain safe and functional, supporting continuous learning. In essence, investing in strong IEQ measures improves the resilience of schools, ensuring they can adapt to climate disruptions while safeguarding student health and well-being.

B) What the law already recommends for indoor environmental quality in schools

- **The American Society of Heating, Refrigerating and Air-Conditioning Engineers (ASHRAE)** provides [standards and guidance](#) that are widely recognized for maintaining and improving IEQ in schools.

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ASHRAE emphasizes the importance of a holistic approach—balancing ventilation, thermal comfort, air cleanliness, acoustic quality, and lighting—for optimal student health and performance.

- **California Department of Public Health (CDPH)** has [guidance](#) for improving indoor air quality in schools.
- **Ed Code 17072.35(a)** allows grants for new construction to be used for the costs of designs and materials that promote the efficient use of energy and water, the maximum use of natural lighting and indoor air quality, the use of recycled materials and materials that emit a minimum of toxic substances, the use of acoustics conducive to teaching and learning, and other characteristics of high performance schools. *Note: The Division of the State Architect reviews code compliance in the plans but is not required to focus on implementation.*

C) What Proposition 2 authorizes for indoor environmental quality

While the proposition does not explicitly mention "indoor environmental quality," its focus on renovating aging facilities encompasses improvements that can enhance IEQ, such as updating HVAC systems, improving ventilation, and addressing issues like mold and outdated infrastructure. These upgrades aim to create safer and healthier learning environments for students and staff.

D) Recommendations for including indoor environmental quality in state regulations and guidance

To ensure IEQ is meaningfully integrated into facilities master plans, planners should align designs with California regulations such as Title 24, CALGreen, the Healthy Schools Act, and AB 841, which set standards for ventilation, filtration, lighting, and acoustics. Incorporating ASHRAE standards for thermal comfort and ventilation, along with commissioning and maintenance plans, helps sustain long-term indoor air quality and occupant well-being. Equity should be a guiding principle—prioritizing upgrades in schools most impacted by poor IEQ and climate-related stressors like wildfire smoke or extreme heat. Using tools like the Facility Inspection Tool, CHPS Criteria, or the WELL Building Standard can support data-driven planning and accountability for healthy learning environments.

E) Considerations and guidance for facilities master plan developers to use for including energy resilience, electrification, and decarbonization

To integrate IEQ into a facilities master plan, planners should take a holistic approach that prioritizes the health, comfort, and performance of students and staff. Following are general ideas to include for IEQ: building envelope, mechanical HVAC systems, minimum ventilation rates, air filtration systems, location of air intakes, design temperatures, humidity controls, acoustical requirements and features, lighting systems (including outside lighting), active design, and exterior views.

IEQ strategies should be integrated early in the design process and supported by performance-based goals. Collaboration with health, maintenance, and instructional staff ensures solutions are practical and aligned with the school community's needs. Long-term monitoring and maintenance must also be considered to sustain healthy indoor environments.

ISSUE 3: Schoolyard Greening

Schoolyard greening refers to the process of transforming school grounds into environmentally sustainable, park-like green spaces that can include features like trees, gardens, lawns, and permeable surfaces. It often incorporates stormwater management strategies, such as rain gardens and bioswales, and focuses on reducing urban heat islands by increasing shade cover to help moderate temperature.

A) Why schoolyard greening matters in a changing climate

California's public schools cover over 131,000 acres of public land. Much of this land is paved and lacks shade, creating dangerously hot conditions—especially as climate change drives temperatures higher. On a 90°F day, unshaded asphalt can reach 140°F and rubber surfaces over 165°F. These extreme temperatures pose serious health risks to children, who are more vulnerable to heat than adults due to their smaller body size and active play. Furthermore, when nature is absent in children's environments, they are denied the mental, physical, social-emotional, and learning benefits they need.

Green Schoolyards America [analyzed tree canopy coverage across California's K-12 public schools](#) to understand existing conditions and identify opportunities for climate-resilient greening. Experts recommend 30 percent tree canopy coverage in cities and neighborhoods to reduce heat and increase resilience—but most California schools fall short, with only 6.4 percent median tree canopy coverage in student zones. Clearly California schools are far from the goal.

A long-term investment in schoolyard greening can provide numerous benefits:

- Protection for students from extreme heat and climate impacts
- Improved health, learning, and well-being
- Environmental benefits like carbon capture and stormwater management
- Green jobs and workforce development
- Greater resilience for communities across the state

To achieve these benefits at scale, California schools need sustained funding, long-term planning, and action to remove policy and institutional barriers.

B) What the law already recommends for schoolyard greening

In 2002, California adopted an Extreme Heat Action Plan¹, outlining a strategic and comprehensive set of state actions to adapt and strengthen resilience to extreme heat.

Areas of near-term focus include the following efforts:

- Implement a statewide public health monitoring system to identify heat illness events early, monitor trends, and track illnesses to intervene and prevent further harm.
- Accelerate readiness and protection of communities most impacted by extreme heat, including through cooling schools and homes, supporting community resilience centers, and expanding nature-based solutions.
- Protect vulnerable populations through codes, standards, and regulations.
- Expand economic opportunity and build a climate-smart workforce that can operate under and address extreme heat.
- Increase public awareness to reduce risks posed by extreme heat.
- Protect natural and working lands, ecosystems, and biodiversity from the impacts of extreme heat.

Additionally, according to the California Department of Public Health, school districts and schools can help reduce heat exposure in schools and schoolyards through engineered and nature-based solutions. Examples for schoolyard greening from this guidance include the following:

- Plant trees to provide shade outdoors, both for the buildings and play areas.
- Install other outdoor shade structures, such as shade sails over playground equipment, outdoor dining, and other outdoor common areas.
- Decrease asphalt cover and increase cool pavements, permeable surfaces, and natural ground cover, like gardens.
- Transition toward schoolyards with more trees and other greenery to reduce heat burden.
- Install or improve cooling equipment (like air conditioners or heat pumps), prioritizing energy-efficient equipment whenever possible.

Furthermore, CALGreen has guidance on the following aspects of schoolyard greening:

- A summary of section 5.106.1-2, addressing stormwater pollution prevention, says that projects that disturb less than one acre of land must prevent stormwater pollution during construction by following local stormwater or erosion control ordinances. Projects that disturb one acre or more—or are part of a larger development—must follow stricter state stormwater rules, including managing runoff through eco-friendly design practices that match preconstruction conditions.

¹ California Natural Resources Agency, “Protecting Californians From Extreme Heat: A State Action Plan to Build Community Resilience,” April 2022.

<https://resources.ca.gov/-/media/CNRA-Website/Files/Initiatives/Climate-Resilience/2022-Final-Extreme-Heat-Action-Plan.pdf>.

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- A summary of sections 5.106.12.1, 2, 3, and 6, addressing shade trees, says that schools must plant shade trees to eventually cover key outdoor areas—like parking lots, landscapes, and hardscapes—with shade by specific percentages within fifteen years: 50 percent for parking areas and 20 percent for both landscape and hardscape areas, especially where students gather. Tree irrigation must follow water-efficient guidelines to ensure long-term tree health.

C) What Proposition 2 authorizes for schoolyard greening

Proposition 2 provides clear authority for state funds to support schoolyard greening:

- Sections 17072.35, 17073.16, and 17074.25 allow for costs for design, materials, and construction to advance state energy goals pursuant to state law, to support outdoor learning environments, or to directly shade and protect pupils from higher average temperatures, which may include incorporating nature and natural materials.
- Section 17077.35 allows for shade structures and the conversion of ground and rooftop surfaces to materials with low absorption and reflection of heat.

D) Recommendations for including schoolyard greening in state regulations and guidance

As school facility regulations are being reviewed, it is critical to update them with an understanding of climate impacts such as extreme heat and additional flooding. Policy updates should focus on direct benefits for children, including tree canopy coverage goals, and incorporate nature-based outdoor learning spaces as instructional spaces and as critical components of all schools' facilities, treated the same way as indoor classrooms and sports facilities. Furthermore, updates to existing policies should eliminate barriers and catalyze tree planting in schools.

Example recommendations include the following:

- Explicitly mention and prioritize green schoolyards and nature-based outdoor learning spaces as integral components of all school facilities for climate mitigation, health, and instruction in the same way as sports fields, classrooms, and other building spaces are mentioned and prioritized.
- Allocate funding for climate adaptation-related master planning and incorporate climate resilience into guidance for facilities master plans at all schools.
- Highlight eligible investments schools can make to transition to safe, healthy, climate-resilient school buildings and grounds.
- Provide targeted funding for climate resilience projects in vulnerable communities, including green schoolyards.

E) Considerations and guidance for facilities master plan developers for including schoolyard greening

A big-picture goal established by the California Schoolyard Forest System is to plant enough trees by 2030 that, when mature, they will cover at least 30 percent of the student zones on each campus. This goal should be incorporated into facilities master plans.

It is also critical that tree planting be prioritized in the student zone, areas accessible to students during the school day, to maximize benefits of school investments to students. Shade tree plantings shall be installed to provide shade in a minimum of 30 percent of the student zone within fifteen years, prioritizing shading areas where students have access during the school day. This should include playfields, designated and marked areas of organized sport activity, as children will need shade in order to participate during increased high temperatures.

ISSUE 4: Climate Risk Assessment (Includes Heat, Wind, Wildfires, Sea Level Rise, Flooding, etc.)

A climate risk assessment is a process of evaluating potential climate-related risks and vulnerabilities that a community, organization, or infrastructure might face due to climate change. It includes identifying risks, such as extreme heat, wildfires, stormwater flooding, sea level rise, and other extreme weather events, and assessing how these risks could impact operations, safety, and resilience. Climate risk assessments should be part of the assessments included in a facilities master plan.

A) Why a climate risk assessment matters in a changing climate

One of the growing facilities challenges facing California schools is a disruption driven by changes in our climate and increasingly frequent and extreme climate events. Conducting a **climate risk assessment** is critical for understanding how increasing weather extremes, such as heatwaves, floods, wildfires, and rising sea levels, may affect schools, communities, and infrastructure. A thorough assessment helps identify vulnerable areas and prioritize actions to reduce exposure to these risks, enabling better preparedness and response strategies. For schools, a climate risk assessment can reveal how extreme heat or wildfire smoke might disrupt learning, or how flooding or sea level rise could threaten facilities. With this information, districts and schools can take proactive steps to safeguard buildings and outdoor spaces, ensure energy resilience, and improve health and safety protocols for students and staff. In addition, risk assessments guide investment in climate-resilient infrastructure and help ensure compliance with evolving regulations and climate adaptation strategies. Ultimately, conducting regular assessments empowers communities to adapt to climate change, reducing future risks and enhancing resilience in the face of increasingly frequent and severe climate events.

Ten Strands, in partnership with the California Collaborative for Educational Excellence (CCEE) and UndauntedK12, released a brief in January 2025 outlining the role that climate impacts are playing in school emergency planning, and recommendations for how to respond: [Climate Adaptation and Resilience at California's K-12 Schools: Actions and Recommendations for State and District Leadership](#), which outlines the critical need for immediate action and provides recommendations for creating resilient schools that protect students and families from escalating climate impacts.

B) What the law already recommends for climate risk assessments in schools

There is currently no requirement that schools or LEAs take steps to assess their risks related to climate change or to plan for mitigation. However, there are two pieces of state guidance that are related to climate risk assessments:

- [Protecting Californians from Extreme Heat](#), published in 2022 by the governor, provides voluntary guidance and goals related to mitigating the risks of extreme heat by various public agencies but sets no requirements for school districts. One of the goals identified in that report is to “support climate-smart planning in heat-vulnerable schools” (p. 42). Currently, there is no mechanism across the many agencies that interact with school districts to gather data that would allow the state to identify which schools are heat vulnerable. The CDE also has some guidance on [extreme heat](#).
- The CDE provides guidance to LEAs about when schools should alter activities in response to poor outdoor air quality ([School Outdoor Air Quality Activity Recommendations](#)), but these suggestions are left up to individual LEAs to develop and implement. According to the same document, districts “may consider” school closures if an emergency event causes the AQI to exceed 200.

The CDE also already collected data as to why LEAs have closed schools (currently reported on form [J-13A](#)). We recommend that this data explicitly include climate risk.

C) What Proposition 2 authorizes for climate risk assessments

While Proposition 2 does have language about eligible spending for items that may mitigate climate risks (e.g., shading), climate risk assessments are not included in the discussion of facilities master planning.

D) Recommendations for including climate risk assessments in state guidance

One of the notable gaps in the list of required facilities master plan components in Prop 2 is a facilities assessment. Assessment is a core function of facilities master planning, and Education Code 17070.54(c) does leave room for additional requirements. An examples of how this could be included is to add two items as checkboxes on the facilities master plan submission:

- Check the climate risks that the LEA has identified (including extreme heat). The list of options would include stormwater flooding, sea level rise, wildfire, and excessive heat (with some measure, e.g., the [CDPH guidance](#)).
- Indicate whether the FMP includes a plan for addressing those risks.

Furthermore, as noted above, the CDE already collected data as to why LEAs have closed schools (currently reported on form [J-13A](#)). It is recommended that there be a state agency regulation that calls for this data to be made available to the public, segmented to include climate risks.

E) Considerations and guidance for facilities master plan developers to use for including a climate risk assessment

- **Assess local climate hazards:** Identify region-specific climate risks, such as extreme heat, wildfire smoke, flooding, sea level rise, or drought, using publicly available climate projections and hazard maps (e.g., Cal-Adapt, US Climate Resilience Toolkit).
- **Evaluate vulnerability of sites and populations:** Examine the physical vulnerability of school buildings and grounds, and consider the social vulnerability of student populations—especially those with limited resources, disabilities, or health risks that make them more sensitive to climate impacts.
- **Analyze infrastructure resilience:** Review building systems (e.g., HVAC, power, roofing, drainage) to assess their ability to withstand and operate during extreme weather events. Prioritize retrofits that improve energy efficiency, indoor air quality, and passive cooling.
- **Integrate long-term adaptation strategies:** Align climate resilience planning with capital improvement timelines. Include green infrastructure (like tree canopy and permeable surfaces), renewable energy systems, and shaded outdoor spaces to increase both climate protection and learning opportunities.

Ten Strands, in partnership with the CCEE and UndauntedK12 also developed a [Climate Resilience and Adaptation Toolkit](#) for Local Education Agencies (County Offices of Education, Districts, and Schools). The toolkit is a comprehensive resource designed to support school and district leaders in implementing climate resilience strategies. The toolkit showcases best practices and lessons learned from districts across the state that have successfully addressed climate-related challenges like energy and grid resilience, stormwater management, and wildfire preparedness. This valuable resource provides practical tools and guidance, as well as access to data to help schools take immediate steps toward building a more resilient and sustainable future.



May 23, 2025

Communications Team
Office of Public School Construction (OPSC)
707 Third St, 4th Floor
West Sacramento, CA 95605

RE: FEEDBACK ON TOPICS PRESENTED DURING THE MAY 8, 2025 STAKEHOLDER MEETING FOR IMPLEMENTATION OF PROPOSITION 2 FOR THE SCHOOL FACILITY PROGRAM

To Whom it May Concern:

Hancock Park & DeLong, Inc. appreciates the opportunity to continue providing feedback regarding the topics presented during the tenth Proposition 2 Stakeholder meeting held on May 8, 2025.

Below is a summary of our comments and concerns:

• Modernization Grant for 75 years or Older Buildings

- We encourage OPSC to reconsider allowing the relocation of certain 75-year old buildings, and the associated site development costs, when the relocation includes a Multipurpose/Cafeteria building or a Gymnasium/Locker building. Title 5 requires Gymnasiums/Showers/Lockers to be secured from other parts of the campus for evening and weekend events and/or for public use (including emergencies). Similarly, Title 5 requires Multipurpose buildings to be located on the campus where the building will be easily accessible for public use, but close to the street for delivery truck access. Districts should have the ability to relocate these buildings on their school campuses in order to meet Title 5 requirements and increase school security while also allowing public access.

• CTE Facilities: Modernization Supplemental Grant

- We request clarification regarding contract dates for prior modernization projects that include CTE facilities. May a project be submitted with a current CDE score letter if the contract for the work was executed prior to July 3, 2024?

• Regulatory Amendments for General Clean-up

- The current instructions for Part D of the *Enrollment Certification/Projection* (Form SAB 50-01) include outdated references for how special education enrollment information is reported to CDE. The form currently asks for the information "as shown and reported within the California Special Education Management Information System [CASEMIS] to the CDE in December prior to

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the latest CBEDS report.” Data collection for special education pupils was transitioned from CASEMIS to the California Longitudinal Pupil Achievement Data System (CALPADS) over five years ago, during the 2019-20 school year. Under CALPADS, special education pupil data is collected at the same time as the rest of the K-12 data is collected, in early October of each year; there is no longer special ed data reporting being done in December of each year. As special education enrollment is no longer reported to CASEMIS, and no longer reported in December, clarification on the appropriate reporting process would be appreciated. It may be appropriate and timely to update the Form SAB 50-01 instructions to better align with the current practice by school districts.

- **Modernization Grant for Facilities Previously Modernized with State Funds**

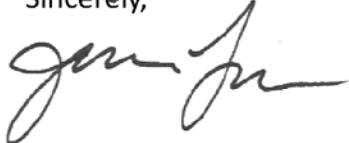
- Regarding the situations where a district replacing a portable classroom eligible for second round funding with a different usage, assuming classroom space is no longer needed, we encourage OPSC to take another look at the previously proposed request.

The language of EC Section 17074.10(f) states “for a portable classroom that is eligible for a second modernization, the board shall require the school district to use the modernization funds to replace the portable classroom and to certify that the existing eligible portable classroom will be removed from any classroom use...” We concur with staff’s interpretation to mean that the replacement building must be for classroom use and that the district is required to replace the portable classroom space with classroom space (permanent or portable), *under this first section of the EC*. However, the remainder of ECS 17074.10(f) states, “...unless the school district is able to document that modernizing the portable classroom is a better use of public resources.”

We request that OPSC allow the replacement-in-kind of different usage to be considered “a better use of public resources”, as certified to by the district. Per SFP Reg Section 1859.79.2(a)(1) “modernization” is allowed to be “Replacement building area of like kind”, therefore it follows that a district “modernizing” a classroom should be able to replace it with like-kind building area. Further, OPSC has previously opined that “replacement area of like kind” refers to replacement *square footage* and not the *type of area*. Again, statewide K-12 enrollment is currently declining, many districts are needing to now re-evaluate their spaces and make the decisions that are best for their student population.

Please let us know if you have any questions or would like additional information regarding these topics. We look forward to continuing conversations as these topics progress with development.

Sincerely,



Jessica Love

Hancock Park & DeLong

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May 23, 2025

Rebecca Kirk, Executive Director
Office of Public School Construction
Department of General Services
707 Third St
West Sacramento, CA 95605

Re: Proposition 2 Implementation Stakeholder Meeting #10

Dear Ms. Kirk,

On behalf of the Los Angeles Unified School District (Los Angeles Unified), we appreciate OPSC's Proposition 2 stakeholder engagement and welcome the opportunity to provide input on the proposed amendments to the Schol Facility Program in response to Proposition 2.

The comments and recommendations provided below correspond to the topics raised and materials provided for the May 8, 2025, Implementation Stakeholder Meeting #10.

75-Year-Old Modernization Supplemental Grant

Stakeholder Feedback #3 - OPSC's response states that F1 level is to be used for 75-years-or-older projects. However, OPSC references three different Sierra West Levels in the subsequent pages: F2 level (pp. 16), F1 level (pp. 28), and F3 level (pp. 30). Los Angeles Unified continues to advocate for the appropriateness of using the F3 level, consistent with the definitions provided in the *Sierra West Current Construction Remodeling Costs 2025* publication. Nonetheless, LA Unified would also support the use of the F2 level. As illustrated by Sierra West (see Image 1), the F1 level is not appropriate for the modernization of a 75-year-old facility, as Sierra West indicates that F1 is typically applied to new construction or tenant improvements in large, open, unfinished spaces—conditions that do not reflect the complexities of modernizing an aging structure.

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INSTALLATION COSTS BY DEGREES OF DIFFICULTY

F-1 This installation cost represents the easiest work for the contractor in the specific trade under consideration. All conditions are normal, with the lowest combination of difficulty, with the above enumerated factors, taken into account. *Typically new construction or the installation of tenant finishes in large area or open space of a new building is a good example of the application of F1.*

F-2 This installation cost represent a remodeling/renovation situation that is more difficult than F1. It generally represents a productivity factor of 2/3 of F1. It may include architectural inspection, smaller quantities, or a slightly faster schedule. *Typical of large modernization projects, including ADA, seismic, dry rot*

F-3 This installation cost represents a productivity factor of 1/2 of F1. Typical situations are those which are a less than common type of construction, involve very small quantities, are in a remote location or have difficult access. *An example includes change orders for mold, dry rot, ADA, etc. The repair of a fire loss with full burn-out of small rooms.*

F-4 This installation cost represents the most difficult situation for a contractor. These situations include a unique or historical replacement, very small quantities, in an isolated section of a building, in a secure area and productivity will be only 1/3 of normal.

Please see Foreword, Page II, for additional information.

Image 1

Accordingly, LA Unified urges OPSC to authorize the use of the F2 or F3 levels (with a preference for the F3 level) for modernization projects involving aging facilities, and to update the associated regulations and forms to reflect a consistent and appropriate application of these cost levels.

Stakeholder Feedback #7 – OPSC's response does not address the stakeholder's request for the rationale for basing 75-year-old site development utilities grant on 50-year pupil grants. Los Angeles Unified requests further clarity on OPSC's rationale on this item.

Stakeholder Feedback #11 – The revisions to 2 CCR Section 1859.78.65(b)(5) were not included as part of the May 8, 2025, meeting materials. Los Angeles Unified requests the proposed revisions be provided for stakeholder review before they are finalized

Stakeholder Feedback #12 – Los Angeles Unified requests the rationale behind the 35 percent cap that is being proposed for site development related to 75-year-old buildings.

Stakeholder Feedback #13 – OPSC states its opposition to funding site development costs for replacement of a 75-year-old building elsewhere on the same campus. Los Angeles Unified requests the basis for this determination.

Proposed 2 CCR Section 1859.78.7.1 – Please see the Attachment at the end of this letter, which includes Los Angeles Unified's in-line comments on the "Modernization Additional Grant for 75 Years or Older Buildings" section.

Proposed SAB Form 50-04

- Based on the information provided, the first two bullet points under Section 2.d (p. 20) should read: “The total number of eligible classrooms and/or the total non-classroom square footage...”.
- Based on the information provided, Section D (p. 23) should be clarified to state: “The total square footage of eligible non-classroom space being demolished”.

Proposed Form SAB 57-75

- For clarity, Los Angeles Unified suggests the proposed categories under Part IV (p. 29) be revised to read “Permanent Toilet,” “Permanent Other,” “Portable Toilet,” and “Portable Other.”
- Part IV (p. 29) references “OPSC Verified Total Project Cost” but Los Angeles Unified believes it should read “OPSC Approved Total Project Cost” to reflect the language on the form. The “Calculation Detail” (p. 31) appears to include an internal OPSC note in error.

Career Technical Education Supplemental Grant

Proposed 2 CCR Section 1859.78.10(b)(2) – OPSC proposes use of Sierra West F1 Level costs for the detailed cost estimate associated with the career technical education (CTE) scope of work under the supplemental grant. This approach deviates from 2 CCR §1859.193(b)(A) and (c)(A), which allow CTEFP project costs to be determined by the project architect. Requiring F1 Level estimates introduces duplicative effort for LEAs who elect to pursue the CTE supplemental grant for high-scoring CTEFP applications that did not receive funding, and creates inconsistency within the SFP regulations for CTE scopes of work. Los Angeles Unified recommends that architect-prepared estimates be accepted for the supplemental grant to reduce administrative burden and for alignment with CTEFP application documentation.

Global SFP Regulation Updates

Stakeholder Feedback #2 – OPSC’s response to the stakeholder comment does not fully address the question posed. It is understood that buildings without DSA approval should not be included in the snapshot to determine modernization eligibility, however this does not address how buildings built before DSA existed should be aged. Any building built before 1933 did not receive a DSA approval stamp until after 1933, which means the building’s age is being misrepresented. This misrepresentation affects school districts’ ability to apply for supplemental grants determined by a building’s age, such as the 75-year-old modernization supplemental grant. Los Angeles Unified recommends that, for buildings constructed prior to the establishment of DSA, the date of the original construction plans be used to determine age eligibility under the 75-year-old supplemental grant.

2 CCR Section 1859.193 Career Technical Education Facilities Grant Determination – Los Angeles Unified would like clarification on whether reducing specific equipment to fewer items (e.g., purchasing two units of an item instead of four units) or removal of equipment altogether, due to descoping during design or lack of availability, is still considered a change in scope, and would therefore continue to require an appeal be submitted to the SAB.

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Proposed 2 CCR Section 1859.106 Revisions – Los Angeles Unified disagrees with OPSC’s interpretation that the penalty for a finding of ineligible expenditures must equal 100% of the funds in question. The School Facility Program is fundamentally structured around a matching share model, where both the State and Local Education Agency contributes proportionally to eligible projects. Accordingly, any repayment obligation should be limited to the State’s matching share of the ineligible expenditures, as determined by the local auditor, rather than the aggregate amount.

The intent of the penalty provision is to protect the State’s financial interest—not to recover funds beyond its contribution. Requiring repayment of 100% effectively includes both the State and local shares, which exceeds the scope of the State’s interest and imposes an undue financial burden on the Local Education Agency.

Second Round Modernization

Item #5 (p. 295) - This item specifies that when a portable classroom is replaced by a permanent building, it will continue to generate eligibility as a portable every 20 years. Los Angeles Unified seeks clarification on what happens when a portable classroom is replaced with a portable classroom. Additionally, Los Angeles Unified requests further explanation on the rationale to continue to classify a permanent building as a portable building.

Determination of Second Round Modernization Pupil Types – Los Angeles Unified has concerns with OPSC’s current methodology for determining the type of pupil grant (permanent or portable) returned to districts during second-round modernization funding. Because funding applications do not require districts to identify whether the grant request was for permanent or portable pupils, Los Angeles Unified recommends that districts be given discretion to determine the type of pupil grant being returned. A proration based on square footage of permanent versus portable facilities may not accurately reflect the original intent of the application, particularly when permanent construction was proposed. As such, it may result in an inequitable return of eligibility after the aging period.

For example, if a district had 400 eligible pupils, with 200 being permanent pupils and 200 being portable pupils, and submitted a funding request for 150 pupils, the district should be permitted to designate whether that request reflected permanent pupils, portable pupils, or a combination of both when those pupils become eligible for second-round funding. This is particularly important when the original funding application proposed constructing permanent facilities.

Thank you for the opportunity to provide feedback on this item.

Sincerely,



Sasha Horwitz
Legislative Advocate
Los Angeles Unified School District

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1859.2 Definitions

....
'Form SAB 57-75' means the 75 Year Old Building Cost/Benefit Analysis, Form SAB 57-75, (Revised xx/25), which is incorporated by reference.

....

Section 1859.78.7.1 Modernization Additional Grant for 75 Years or Older Buildings

In lieu of the funding provided by subdivision (a) of Education Code Section 17074.10 and Section 1859.78.3, the Board shall provide funding to Approved Applications received on or after October 31, 2024 for projects that include the demolition and replacement of 75 years or older permanent or portable school building(s) if a contract for the work was awarded on or after July 3, 2024.

(a) To receive 75 years or older funding pursuant to Education Code Section 17074.265, all of the following must be met:

- (1) The existing permanent or portable building must be at least 75 years or older. For purposes of determining the age of the building, the 75 years or older period shall begin 12 months after the original plans for the construction of the building were approved by the Department or DSA as applicable.
- (2) Each building on the site that is 75 years or older must qualify on an individual basis.
- (3) If the school building was demolished prior to OPSC's receipt of an Approved Application, the school building must have been 75 years old prior to the demolition.
- (4) The existing permanent or portable building must be replaced at the same site.
- (5) The School District must complete and submit to OPSC a 75 Year Old Building Cost/Benefit Analysis (Form SAB 57-75) that demonstrates the total cost to modernize the school building(s) and comply with current Title 24 Building Code are at least 50 percent of the Current Replacement Cost for the applicable building type: permanent or portable. The cost/benefit analysis must meet the following criteria:
 - (A) The Form SAB 57-75 must demonstrate the minimum work required to modernize and remain in the School Building is at least 50 percent of the Current Replacement Cost of the existing Square Footage of the school building.

LAUSD Comments:

The Los Angeles Unified School District respectfully seeks clarification on who is responsible for determining what constitutes "minimum work."

(B) The modernization work required may only include work directly related to the demolition and replacement of the 75 year old school building(s), which may include improvements to extend the useful life of, or to enhance the physical environment of the qualifying 75 year old building. The Form SAB 57-75 may only include:

1. The cost of design, engineering, testing, inspection, plan checking, construction management, demolition, construction, the replacement of portable classrooms, necessary utility costs, utility connection and other fees, the purchase and installation of air-conditioning equipment and insulation materials and related costs, costs to limit pupil exposure to harmful air pollutants by updating air filtration systems, furniture and equipment, including

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telecommunication equipment to increase school security, fire safety improvements, and the upgrading of electrical systems or wiring or cabling of classrooms in order to accommodate educational technology.

2. The cost of designs and materials that promote the efficient use of energy and water, the maximum use of natural lighting and indoor air quality, the use of recycled materials and materials that emit a minimum of toxic substances, the use of acoustics conducive to teaching and learning, and other characteristics of high-performance schools.

(C) The Form SAB 57-75 may not include costs associated with the acquisition of real property or costs for routine maintenance and repair.

(D) The Form SAB 57-75 must use the most current edition of the Current Construction Remodeling and Repair Cost publication by Sierra West Publishing. For all materials or items listed in the most current edition of the Current Construction Remodeling and Repair Cost publication, the amounts entered on the Form SAB 57-75 must use the provided unit costs. For individual materials or items that are not contained in the most current edition of the Current Construction Remodeling and Repair publication, the School District must provide supporting documentation to demonstrate that the costs for the unique work are reasonable and appropriate.

(E) All requested line items shall include Construction Specifications Institute reference number (CSI #), description, F2 total unit cost amount, and quantity. Any line items that include amounts in lump-sum formats will not be reviewed or approved.

LAUSD Comments:

Per OPSC's response to Stakeholder Feedback Item No. 3: "OPSC maintains the position of providing the F1 level for 75-years-or-older projects." The Los Angeles Unified School District respectfully seeks clarification regarding which unit cost amount should be used on Form SAB 57-75. As currently written, the regulation instructs the use of the F2 total unit cost, which appears to conflict with OPSC's stated position of applying the F1 level for projects involving facilities that are 75 years or older.

(b) For each 75 years old or older classroom replaced, funding shall be provided on a per pupil grant basis for the number of pupils to be housed as follows: 25 for each K-6 Classroom, 27 for each 7-12 Classroom, 13 for each Special Day Class Non-Severe Classroom, and 9 for each Special Day Class Severe Classroom. The grant amounts shown below shall be adjusted annually based on the change in the Class B Construction Cost Index as approved by the Board each January, pursuant to Education Code Section 17072.10.

- (1) \$19,016 for each elementary pupil.
- (2) \$20,113 for each middle school pupil.
- (3) \$25,592 for each high school pupil.
- (4) \$53,437 for each Special Day Class Severe pupil.
- (5) \$35,738 for each Special Day Class Non-Severe pupil.

(c) For 75 years old or older non-classroom Square Footage replaced, the eligible Square Footage shall be the lesser of the delta between the Square Footage of the existing non-classroom Square Footage determined by Section 1859.60 and actual Square Footage constructed or the delta between the Square Footage of the existing non-classroom Square Footage per the snapshot and the Square Footage justified by enrollment pursuant to the chart in Section 1859.82.1(b)(4)(B)2. Excess square

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footage required as part of Title 5 requirements needed to obtain plan approval are permissible per Regulation Section 1859.79.2 and considered an eligible expenditure, not to exceed square footage provided in Regulation Section 1859.82.1. Any excess Square Footage not due to Title 5 requirements will not be eligible and must be locally funded by the School District. The funding provided will be calculated as follows:

- (1) Multiply the resulting Square Footage of the qualifying building by \$312.

LAUSD Comments:

The Los Angeles Unified School District respectfully seeks clarification on how the \$312 amount was determined. Furthermore, the Los Angeles Unified School District seeks clarification on whether the \$312 will be subject to an annual adjustment.

- (2) Divide the product by the per pupil allowance in subsection (b) to determine the total allowable pupil grants for the square footage being constructed.

(d) An additional grant for site development for the minimum work required to replace the qualifying building. Any site development provided will be reduced, on a prorated basis, by the percentage of excess square footage constructed. The School District may request the lesser of either (1) or (2):

- (1) 60 percent of the following approved site development and applicable design costs:

(A) Service site development cost, within school property lines, attributable only to the replacement 75 year old building for:

1. Site clearance including the removal of trees, brush, and debris within footprint of the replacement 75 year old building.
2. Demolition and removal of the qualifying 75 year old building and existing buildings and site improvements which lie in the footprint of a proposed replacement 75 year old building.
3. Removal and rerouting of existing utility service which lie in the footprint of a proposed replacement 75 year old building.
4. Rough grading including cut and fill and leveling and terracing operations required in the design.
5. Soil compaction adhering to common engineering practices and engineered fill that is required by a soils report that is available for review by the OPSC.
6. On-site drainage facilities including inlets below grade drainage facilities and retention basins.
7. Erosion control improvements such as plant material, temporary sprinkler systems, jute mesh and straw, due to embankments having a slope of at least two to one and a vertical height greater than six feet.
8. Outside stairways, handicap ramps and retaining walls due to embankments having a slope of at least two to one and a vertical height greater than six feet.
9. Fire code requirements on site that are not a part of the building.

(B) Utility service costs that are necessary to serve replacement 75 years or older building:

1. Water: Replacement or repair of main water service line(s) between the utility company connection and to five feet of the 50 years or older building(s) on the site, connection fees if applicable, meter (if not provided by the serving utility), and replacement or repair of a domestic water appurtenances (i.e., well, pump, tank) as needed for the proper operation of the system.

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2. Sewage: Replacement or repair of main sewer line between the utility company connection and to five feet of the 50 years or older building(s) on the site and connection fees, if applicable. Replacement or repair of sewage appurtenances (i.e., treatment/disposal system) as needed for the proper operation of the system and a main disposal line from the treatment system to five feet of the 50 years or older building(s) on the site.
3. Gas: Replacement or repair of main gas service line between the utility company connection and to five feet of the 50 years or older building(s) on the site, connection fee (if applicable), meter (if not provided by serving utility) or replacement or repair of gas service appurtenances (i.e., liquefied petroleum system and tank) as needed for proper operation of the system and a new main supply line from the tank to five feet of the 50 years or older building(s) on the site.
4. Electric: Replacement or repair of electrical service between the utility company connection and the building's main switchboard. Primary electric service runs between the utility company's point of connection and the transformer. Secondary electric service runs between the transformer and the main switchboard. Connection fee, transformer pads and protective devices (i.e., bollards) as required by the utility company.
5. Communication systems: Replacement or repair of service between the utility company connection and the nearest distribution center.

(2) Site development and design costs equal to 35 percent of the funding provided in (b) or (c).

(e) Portable buildings replaced pursuant to this section shall be replaced with a permanent Square Footage.

(f) The qualifying permanent or portable 75 year old or older building must be demolished before the Notice of Completion of the project.

Note: Authority cited: Section 17070.35, Education Code. Reference: Section 17074.265, Education Code.

ATTACHMENT E

May 23, 2025

Ms. Rebecca Kirk
Executive Officer, Office of Public School Construction
707 Third Street
West Sacramento, CA 95605

Subject: Proposition 2 Stakeholder Comments – Various Items

Dear Ms. Kirk:

The Coalition for Adequate Housing (CASH) appreciates the opportunity to provide feedback on the implementation of Proposition 2, the 2024 state school bond. This letter addresses two items from recent stakeholder meetings, including:

- Proposed Regulatory Amendments for General Updates
- Five-Year Master Plan

Proposed Regulatory Amendments for General Updates: Increases to Pupil Grants

On March 13, the Office of Public School Construction (OPSC) presented proposed regulatory amendments for general updates to the School Facility Program (SFP) regulations. CASH is generally comfortable with these proposals, with the exception of one item: a proposed amendment to clarify that “increases to the pupil grant request in the Form 50-04 shall, in most cases, require the withdrawal and resubmittal of the funding application.” The proposal indicates that a pupil grant increase would constitute “line-jumping” that would provide an unfair advantage over other school districts.

CASH recommends that the regulations should not require withdrawal and resubmittal of an application due to a pupil grant increase request. Under current practice, schools are required to demonstrate eligibility at the time that the application is processed, which often occurs at least two or three years after the application was initially submitted. If districts are required to rejustify eligibility and potentially adjust pupil grants *downward* due to changing conditions between application submittal and processing, they should also be permitted to adjust pupil grants *upward* when justified by the eligibility at the site. This can be done without changing the project scope reflected in the plans that have been approved by CDE and DSA, and allows districts to access the pupil grants to which they are entitled. CASH does not agree that this entitlement constitutes line-jumping. If shovel-ready projects were processed for funding within 90 days of submission, there would be no need to make adjustments to pupil grants after the application is submitted. This 90-day processing would also allow the State to catch up on funding the accumulated backlog of school construction projects that have been submitted and are awaiting processing and funding, which is worth approximately \$5 billion.

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Five-Year Master Plan: Deferred Maintenance Plan Verification

CASH previously provided feedback on the Five-Year Master Plan requirement related to the duration of the plan. We wanted to provide additional thoughts on meeting the Deferred Maintenance Plan requirement.

Per Proposition 2, one of the requirements that must be included in the Master Plan is the district's "certified deferred maintenance plan pursuant to Section 17070.75." As OPSC's proposal indicates, Proposition 2 did not make changes to E.C. Section 17070.75, which requires districts to create and contribute funds to a routine restricted maintenance account. OPSC proposes that "a district could submit a URL link to the locally approved maintenance plan or to the local board agenda where it was approved to demonstrate compliance."

CASH concurs that submitting a URL link is an efficient approach to complying with this requirement for many districts. However, after hearing from our members from school maintenance departments, particularly those from small rural schools, *CASH recommends* that in addition to the URL link OPSC allow other options for verification, such as hard copy submittal.

We appreciate the spirit of collaboration and openness that your team has shown during this process. We thank you for the opportunity to provide these thoughts for your consideration.

Sincerely,



Rebekah Kalleen
CASH Legislative Advocate



Ian Padilla
CASH Legislative Advocate

cc: Michael Watanabe, Deputy Executive Officer, Office of Public School Construction
Brian LaPask, Chief of Program Services, Office of Public School Construction

ATTACHMENT F

From: Ken Reynolds <ken@schoolworksgis.com>
Sent: Thursday, February 20, 2025 10:41 AM
To: DGS OPSC-Communications <OPSCCommunications@dgs.ca.gov>; Watanabe, Michael@DGS <Michael.Watanabe@dgs.ca.gov>
Cc: LaPask, Brian@DGS <Brian.LaPask@dgs.ca.gov>; Ly, Candace@DGS <Candace.Ly@dgs.ca.gov>; Faust, Maria@DGS <Maria.Faust@dgs.ca.gov>; Potter, Joshua@DGS <Joshua.Potter@dgs.ca.gov>
Subject: Re: Prop 2 stakeholder meeting #3

CAUTION: This email originated from a NON-State email address. Do not click links or open attachments unless you are certain of the sender's authenticity.

Good morning.

Thanks for the information shared today.

Second Round of Modernization

For the first topic, does a district need to do anything to request the second round of modernization? Will there be a new form to request the eligibility or will there be a check box on the 50-04 to request the second round funding increase?

I would also ask that for the modernization projects that went through the RCI process, that they should get those few grants back after 25 years.

I am not sure if I fully understand the true impacts of how this is being implemented. Here is my concern: If a school did a previous modernization project that used 500 grants and it is now 25 years later, they should be able to use the 500 grants again. However, I am not sure that is exactly true based on the item you presented. If the school had only permanent building, this statement would be accurate. However, if 4 of the classrooms were portables then 100 of those 500 grants are only available if the district plans to replace those with new classrooms. That is how I am understanding the item. But what if the current project does not touch those portables, then they will only have access to the 400 grants? I know this is a specific (and simple) situation, but is that the way this is being implemented?

TK Enrollment & Projections

I do have some comments on the second item regarding the TK enrolment projections. As you may know I do demographic studies for school districts so they can have accurate enrolment projections for their planning purposes. I appreciate all the methods that were considered and acknowledge how challenging it is at this time when the TK program is still in the process of expanding to all 4 year olds. The projections I do for schools are typically within 1% or less of the actual enrolments. I spent a lot of time trying our best to predict the impact of TK enrollments and as you have seen, the numbers vary from one district to the other. Of the options you have shared, I think Option 1 will be the most accurate projection once the TK program is finished with the transition process. So, for the long term this would be best understanding that there may be some variances in the short term.

The other option that looks like it would be very accurate is option 6 where you project TK numbers the same way as SDC. We would see an increase in TK if the district is growing and a drop if the district is declining. Since this new method would not go into effect until we have the enrollment data for the fall of 2025, TK will already be open to all 4 year olds.

ATTACHMENT F

So, if you are looking for an accurate method, which I would think you are, then those two option are best.

As you saw during the meeting, these options will probably not be the ones that generate the most new construction eligibility, but that should not be the goal.

Thanks again for all the work you put into these items.

Ken Reynolds
SchoolWorks



Alberto M. Carvalho
Superintendent

Los Angeles Unified School District
Legislative Affairs & Government Relations

Sacramento Office: 1201 K St., Suite 1040
Sacramento, CA 95814
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Los Angeles, CA 90017
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Board of Education
Scott M. Schmerelson, President
Dr. Rocío Rivas, Vice President
Sherlett Hendy Newbill
Nick Melvoin
Karla Griego
Kelly Gonez
Tanya Ortiz Franklin

March 7, 2025

Rebecca Kirk, Executive Director
Office of Public School Construction
Department of General Services
707 Third St
West Sacramento, CA 95605

Re: Proposition 2 Implementation Stakeholder Meeting #3

Dear Ms. Kirk,

On behalf of the Los Angeles Unified School District (Los Angeles Unified), we appreciate OPSC's Proposition 2 stakeholder engagement and welcome the opportunity to provide input on the proposed amendments to the Schol Facility Program in response to Proposition 2.

The comments and recommendations provided below correspond to the topics raised and materials provided for the February 20, 2025, Implementation Stakeholder Meeting #3.

Modernization Grant for Facilities Previously Modernized with State Funds

Proposal for Further Discussion

Los Angeles Unified would like to thank OPSC for the thoughtfully proposed methodology to handle the implementation of the modernization grants for facilities that were previously modernized with state funds. However, review of the documentation provided indicates there continues to be a need for further discussion and clarification around this topic.

At the time of the 2004 implementation committee meetings, school districts were dealing with increasing enrollment, aging facilities and navigating a new state funding program. The decisions

made by the committee were reflective of the needs of school districts at the time. Twenty years later, school districts continue to deal with aging facilities, but this is now paired with declining enrollment which impacts their ability to allocate funds for needed site and facility improvements.

While the implementation committee recognized the need to provide age parameters around regeneration of modernization pupil grants (Education Code Section 17073.15), it did not define the method for calculating eligibility regeneration. The text of EC 17074.10(f) infers that modernization pupil usage (apportionment) and work funded, would be linked to a building, like the Lease Purchase Program (LPP) and Seismic Mitigation Program (SMP). In the case of LPP and SMP, an apportionment was provided for the rehabilitation or replacement of a specific building, and the age and eligibility of that building is reset to the SAB-approved apportionment date, thus restarting that building's ability to generate eligibility.

This contrasts with how the modernization program has been implemented over the last 25 years, where modernization apportionments can be used for a site's needs. Whether it be system, site, building, or other improvement, a district could utilize modernization funds without eligibility being tied to a particular building. It would be very difficult to now try and attach pupils to specific buildings, especially in cases where previous apportionments were for site-wide improvements. The difficulty of this task is evidenced even by OPSC's own proposed calculations that use a ratio of eligible permanent and portable buildings rather than try to allocate pupils to a specific building based on a previously apportioned project's scope of work.

Los Angeles Unified proposes that OPSC convene an implementation committee to discuss the calculation and usage of second round eligibility. The committee would discuss the impacts of limiting second round funding to the portable(s) generating the eligibility, how to best calculate regenerated pupils, whether it should be based on a permanent-to-portable ratio or other method, and identify what Education Code and 2 CCR changes would be needed to support the outcome of these discussions. This conversation is especially critical given that OPSC has already begun implementing the calculation method specified in the stakeholder materials in recent day letters without full discussion in stakeholder meetings.

Tracking Second Round Modernization Eligibility

OPSC has indicated that second round eligibility will be added to a site's eligibility. Los Angeles Unified requests clarification on how OPSC will track the differences between first and second round portable and permanent eligibility since OPSC has proposed that second round portable eligibility has restricted use. Los Angeles Unified requests clear examples of tracking in future stakeholder materials.

Use of Second Round Modernization Eligibility for Submitted Applications

OPSC has stated in stakeholder materials and meetings that it will track the return of pupil grants and reinstate them into the eligibility baseline once they reach the appropriate age determined by the apportionment date of previous funding applications. However, in recent day letters received, OPSC indicated that the return of pupil grants for second round modernization of portable classrooms is

subject to SAB approval. Los Angeles Unified seeks clarification on which date will determine when the pupil grants become available for use—25 or 20 years from the apportionment date, or the date when the SAB approves their return.

Lastly, since districts could have received a modernization apportionment as early as 1999, this discussion comes six years too late for portables that should have already regenerated eligibility and one year too late for permanent buildings that should have done so. Therefore, Los Angeles Unified requests that OPSC allow districts to incorporate second-round pupils at the time a current application is processed by permitting an increase in requested pupil grants, provided the application still meets the 60% commensurate test.

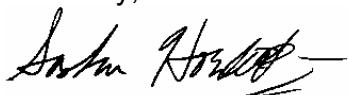
We further request that this provision be applied retroactively to any unprocessed application that had second-round pupils available for use at the time of submittal. Allowing districts to modify their pupil grant requests upward to include second-round funding pupils is a fair solution to the lack of timely information, methodology, and regulation. Additionally, because existing regulations prohibit upward modifications to an application's pupil grant request, Los Angeles Unified requests regulatory changes to allow this adjustment.

Evaluation of Transitional Kindergarten Pupils in School Facility Program Enrollment Projection

The full implementation of transitional kindergarten is expected in the 2025-26 school year, when all 4-year-olds will be eligible, and all districts—except charter schools—will be required to offer it. Since the phased implementation is still ongoing, selecting a methodology now would be premature, as its impact on a district's ability to request funding remains uncertain. Los Angeles Unified recommends continuing discussions on this topic and providing additional analysis on how different enrollment projection methods align with actual enrollment trends and needs.

If you have any questions regarding these comments, please contact Sasha Horwitz, Legislative Advocate: Sasha.Horwitz@lausd.net or (916) 443-4405.

Sincerely,



Sasha Horwitz
Legislative Advocate
Los Angeles Unified School District

ATTACHMENT F

From: Rob Murray <rob@kinginc.com>

Sent: Friday, March 7, 2025 11:50 AM

To: DGS OPSC-Communications <OPSCCommunications@dgs.ca.gov>

Subject: Feedback on Options for TK Students in SFP Enrollment Projections

CAUTION: This email originated from a NON-State email address. Do not click links or open attachments unless you are certain of the sender's authenticity.

Hello,

Thank you for providing several options for how TK students can be independently projected for SFP New Construction enrollment projections.

After reviewing the options using data from several school districts, I believe **Option 1** represents the best path forward.

For as long as TK remains non-compulsory, it will be important to treat it as its own distinct population. Any projection option that uses TK enrollment to directly calculate future kindergarten enrollment via cohort survival is extremely flawed, in my opinion, and should not be considered. For this reason, I also strongly advise against Options 2 and 4.

The current methodologies for calculating kindergarten (which can also be done using local or county births) work well, and with nearly 30 years now of precedent, there does not seem to be any need to alter this. Calculating future TK in the same way seems the most obvious way forward.

I also believe using actual historical TK enrollments is much better than estimating what TK might have been as is proposed in Option 3. While this has appeal in our immediate context in the middle of TK expansion, the regulations adopted need to work well now and for all future years. In just a few years, once TK is fully implemented for all four year olds, there will be no point in estimating TK instead of simply using the actual enrollments. Avoiding this option also avoids more work integrating new calculations into the projections calculator.

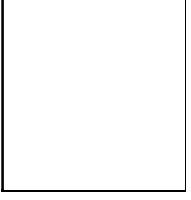
Finally, Option 5 also keeps TK distinct without altering current kindergarten methodology. My only objection to this option is the relative complexity and alteration to the Form 50-01 compared to what will be accomplished more easily with Option 1.

In summary, **Option 1** is my preference for the future of SFP enrollment projections, and I have particular concerns with Options 2 and 4.

Thank you, and please let me know if there is any other information I can provide.

Best regards,

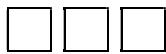
Rob

 **Rob Murray**
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ATTACHMENT F



March 7, 2025

Communications Team
Office of Public School Construction (OPSC)
707 Third St, 4th Floor
West Sacramento, CA 95605

**RE: FEEDBACK ON TOPICS PRESENTED DURING FEBRUARY 20, 2025 STAKEHOLDER MEETING
FOR THE SCHOOL FACILITY PROGRAM**

To Whom it May Concern:

Hancock Park & DeLong, Inc. appreciates the opportunity to continue providing feedback regarding the topics presented during the third Implementation meeting of the year, held on February 20, 2025. Below is a summary of our comments and concerns:

• Modernization Grants for Facilities Previously Modernized with State Funds

- We appreciate OPSC clarifying that the replacement *does not* need be a permanent facility, as noted was the requirement a few times in the stakeholder meeting item.
- We have seen a number of instances of a district replacing a portable classroom eligible for second round funding with a different usage, assuming classroom space is no longer needed. In these situations we encourage the possibility of OPSC allowing that replacement-in-kind to be considered “a better use of public resources”, as certified to by the district. With statewide K-12 enrollment currently declining, many districts are needing to now re-evaluate their spaces and make the decisions that are best for their student population – classroom space is often less needed now than it was in 2003 when this law came into effect. Enrollment has dropped by 6% just in the last 10 years; schools that once needed 16 classrooms may now only need 15 classrooms.
- If the regulations are changed in the future to allow a replacement-in-kind in lieu of a replacement classroom, we would appreciate the ability to re-instate any funding application(s) which was previously returned to a district due to OPSC’s current interpretation of the application not meeting the current statute and SFP regulations.
- A flowchart or similar type of visual would be greatly appreciated when trying to evaluate if and when certain facilities are eligible to generate second round eligibility, and if and when certain *projects* are then eligible to utilize the funding from second round eligibility.

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- **Evaluation of Transitional Kindergarten (TK) Pupils in SFP Enrollment Projections**

- We understand that OPSC used actual enrollment data from 2019/20 to 2021/22 in order to test various versions of the 50-01 form projection calculations. We believe it would be really beneficial to see more current data used in these various calculations, including from 2022/23 and forward, when the Universal TK (AB 130) program was being phased in, and TK enrollment was starting to increase.
- If allowed, HPD staff would love have access to the spreadsheets OPSC used for testing, in order to “play around with the numbers” further.
- Below are the six calculation options tested by OPSC, with our comments and concerns:

- 1) TK & Kinder Linear Weighted Average + 1st-12th Cohort Survival method, with actual TK Enrollment (new row on 50-01 form)
 - 2 districts increased, 4 districts decreased; 0% average change; isolates & minimizes TK change/impacts.
 - HPD is in favor of this option.
- 2) TK Linear Weighted Ave + K-12th Cohort Survival method, with actual TK Enrollment (new row on 50-01 form)
 - Drastic average 171% increase to projections; creates false inflation with data used, but with more current, higher enrollment, the changes would likely be less drastic.
 - HPD is in favor of this option, with more analysis.
- 3) TK & Kinder Linear Weighted Ave + 1st-12th Cohort Survival, TK Enrollment calculated similar to FDK with a 3-year average (new row on 50-01 form).
 - Average +10.5% increase to 6 districts; doesn't use actual enrollment; minimizes fluctuations in TK.
 - HPD does not support this option due to actual enrollment not being used.
- 4) TK Linear Weighted Ave + K-12th Cohort Survival method, TK Enrollment similar to FDK with a 3-year average (new row on 50-01 form)
 - Average -8.5% decrease in projections; likely inaccurate representation of actual need.
 - HPD does not support this option due to actual enrollment not being used.
- 5) Separate TK Projection From Existing K-12 Projection, apply SDC projection methodology to Actual TK Enrollment (NO new row on 50-01 form)
 - 2 districts increased, 4 districts decreased; -0.2% average change; SDC & TK both variable groups; seems to be a less accurate projection method, doesn't account for year-over-year trends.
 - HPD does not support this option.
- 6) TK/K Linear Weighted Ave + 1st-12th Cohort Survival method (NO new row on 50-01 form, no change to calculation)
 - Results n/a; shows false dip between K & 1st grade, which seems unfair and inaccurate.
 - HPD does not support this option.

Please let us know if you have any questions or would like additional information regarding these topics. We look forward to continuing conversations as these topics progress with development.

Sincerely,

Jessica Love
Hancock Park & DeLong

ATTACHMENT F

From: Gary Gibbs <gibbsasc@aol.com>

Sent: Tuesday, March 11, 2025 11:07 AM

To: Watanabe, Michael@DGS <Michael.Watanabe@dgs.ca.gov>; LaPask, Brian@DGS <Brian.Lapask@dgs.ca.gov>

Subject: Re: Eligibility Projection (50-0) Changes - Impact on existing Applications

You don't often get email from gibbsasc@aol.com. [Learn why this is important](#)

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Thanks Brian,

Your summary is very helpful and I think your strategy of separating TK from K makes a lot of sense.

In terms of implementation, to keep it simple and ensure districtwide support, my thought is to: (a) either implement the program prospectively for future applications; or, (b) if you think it best for all applications to be included in new methodology, then for those applications that during your review process that were filed prior to implementation of the new eligibility program and can clearly show you they will lose eligibility to extent that funding will be jeopardized then allow the district to base eligibility (for only the specific project) on old eligibility methodology.

Gary

On Tuesday, March 11, 2025 at 10:11:23 AM PDT, LaPask, Brian@DGS <brian.lapask@dgs.ca.gov> wrote:

Good Morning,

Moving TK to its own grade category could actually help in a lot of ways too, it's really dependent on the enrollment of a given district. Right now TK is reported along with Kindergarten, so the K row on the 50-01 is essentially two grade levels worth of enrollment currently. Only roughly half of those kids move to 1st grade next year. So that could show a *decrease* going from K to 1st grade, which could negatively impact your projection. The flip side of that, is the elevated K enrollment that also includes TK could inflate the isolated K projection. So it's hard to say if the inflated K projection offsets the negatively impacted trend that is created by only half of the TK/K kids being reported in the K row on the 50-01 moving to 1st grade.

So it really depends on the individual district and is going to vary from district to district. In my mind, that makes it appropriate and logical to make TK its own grade category as we have proposed, and to look at the TK and K rows in an isolated fashion, thus projecting those two grade levels in a linear and isolated manner, and also in the process smoothing out the transition from K to 1st grade enrollment by removing the TK from the K row and not having the sudden decrease that it creates.

Brian LaPask | Chief, Program Services
California Department of General Services
Interagency Support Division – Office of Public School Construction
Direct: 279.946.8434



ATTACHMENT F

From: Gary Gibbs <gibbsasc@aol.com>
Sent: Tuesday, March 11, 2025 10:03 AM
To: LaPask, Brian@DGS <Brian.LaPask@dgs.ca.gov>; Watanabe, Michael@DGS <Michael.Watanabe@dgs.ca.gov>
Subject: Re: Eligibility Projection (50-0) Changes - Impact on existing Applications

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Hi Michael,

As you navigate modifying the Eligibility Projection Methodology (50-01), given that applications might now take 4 years to review/fund, how will you deal with applications submitted under the current projection method process as many districts might be negatively impacted by the changes.

My two thoughts, although I look forward to your words of wisdom as this is a very complicated issue, is that any changes to 50-01 be prospective (say 2025/2026 school year and beyond) or give districts the option of using new or old methods.

I do agree with you that the methodology needs to be updated given TK fully implemented this year. Just glad I am not the one trying to figure out the best approach.

Good luck.

Gary