

ATTACHMENT A7

OFFICE OF PUBLIC SCHOOL CONSTRUCTION STAKEHOLDER MEETING November 6, 2025

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

PURPOSE

To continue discussion from the August 28, 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 (inclusive of county offices of education) 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, April 10, and August 28, 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 August 28, 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 presenting the Master Plan Guidelines document under a separate, and related, report reflected on Attachments A7d and A7e.

BACKGROUND

At the February 13, April 10 and August 28 meetings, OPSC provided an overview of the new statutory requirements for a Master Plan codified in EC Section 17070.54. At the April 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

BACKGROUND (cont.)

February meeting. At the August meeting, OPSC presented proposed regulations, a new form and a guidelines document to implement the statute.

The full text of the prior stakeholder meeting items can be found at the links below:
[February 13, 2025 OPSC Proposition 2 Stakeholder Meeting #2- Item](#)
[April 10, 2025 OPSC Proposition 2 Stakeholder Meeting #6- Item](#)
[August 28, 2025 OPSC Proposition 2 Stakeholder Meeting #15- Item](#)

The recordings from the stakeholder meetings are available at the links below:
[February 13, 2025 OPSC Proposition 2 Stakeholder Meeting #2- Recording](#)
[April 10, 2025 OPSC Proposition 2 Stakeholder Meeting #6- Recording](#)
[August 28, 2025 OPSC Proposition 2 Stakeholder Meeting #15- Recording](#)

To further support School Districts, OPSC developed a webpage on the 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](#).

Note on Proposed Regulation and Form Changes

This stakeholder item makes proposed changes to the regulations and forms in effect as of the publication date of this item, October 31, 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.

STAFF ANALYSIS/DISCUSSION

This report provides responses to the feedback OPSC received during and/or after the August meeting and presents updated 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 August 28 meeting, as well as summaries and responses to some of the discussion at that meeting.

STAFF ANALYSIS/DISCUSSION (cont.)

Stakeholder Feedback	OPSC Response
1. In summary, the stakeholder raises concerns about the proposed timeline for the Master Plan submittals, specifically noting that treating phased or advanced apportionments projects differently than standard New Construction and Modernization projects could create timing issues and potentially require submissions before regulatory approval. To address this issue, the stakeholder recommends that OPSC align the Master Plan submittal date with the final apportionment (full grant) phase rather than the preliminary phase of phased/advanced apportionment projects, better aligning with submittal timelines for standard New Construction and Modernization projects.	1. OPSC appreciates the stakeholder's feedback. OPSC acknowledges that, as presented at the August stakeholder meeting, the timeline for submittal of a Master Plan for full grant applications following a design or site application was unclear as shown in the charts within the item. OPSC clarifies that the intent of the proposal is consistent with the stakeholder's suggestion. OPSC's proposed timeline for submittal of a Master Plan depends on the date that a full grant Form SAB 50-04 is submitted, regardless of whether the full grant application had a prior design and/or separate site grant approval. This also applies to Charter School Facilities Program projects submitted by school districts that receive a preliminary apportionment, and Small School District Program projects that receive a preliminary apportionment. Therefore, the Master Plan submittal timelines are aligned for all New Construction and Modernization projects, regardless of whether they received a prior design and/or separate site approval. Full grant applications submitted from October 31, 2024 through 12 months from Office of Administrative Law (OAL) approval of the regulations would be required to submit the Master Plan within 90 days of OPSC's notification of application processing, regardless of whether the full grant application had a prior design and/or separate site approval, or a preliminary apportionment. More than

STAFF ANALYSIS/DISCUSSION (cont.)

Stakeholder Feedback	OPSC Response
	1.(cont.) 12 months following OAL approval of the regulations, applicants would be required to submit the Master Plan at the time of application submittal. OPSC has included an updated version of tables presenting the timelines for submittal of a completed Master Plan by program and application type at the end of this item, which 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.
2. The stakeholder recommends additions to the proposed regulations and the Form SAB 50-MP to require school districts to indicate in their inventory of existing school facilities that must be submitted with the Master Plan whether each school site includes the following: • Central air-conditioning system • Tree-shaded outdoor play and learning areas • System for assessing indoor air quality in real-time The stakeholder provided extensive rationale for the recommended additions to help ensure that school districts are advancing measures for climate-resilient schools. The stakeholder also proposes adding the following certifications to the Form SAB 50-MP, along with corresponding requirements in the proposed regulations:	2. OPSC acknowledges and appreciates the stakeholder's feedback and recommendations. While OPSC recognizes the importance of incorporating climate resilient features and planning practices into school facility development, OPSC's approach to implementing the Master Plan requirements is to closely align the proposed regulations with the statute. Recommendations for additional components and best practices are included in the accompanying Master Plan Guidelines document that is required to be created by OPSC by 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.

STAFF ANALYSIS/DISCUSSION (cont.)

Stakeholder Feedback	OPSC Response
2. (cont.) • The Master Plan includes a statement demonstrating alignment with climate impact projections through 2050 or another benchmark that aligns with the useful life of district facilities, including anticipated changes in temperature, flood and stormwater risks, and wildfire and smoke hazards. • The Master Plan includes a summary of community engagement efforts, detailing stakeholders consulted, public feedback received, and the schedule of community meetings. • The Master Plan includes a stormwater management plan. The stakeholder recommends the following changes to the draft Guidelines: • Broadening Chapter 3, Cost Reduction Tools, to account for long-term costs including climate resilience, energy efficiency and on-site energy generation, health and indoor environmental quality, technology and systems upgrades, and replacement/useful life costs. • Rewriting the Sustainability subsection in Chapter 4, Other Considerations, to identify Climate Resilience and Sustainability as a core necessity to ensure schools remain safe, operational, and conducive to learning in future decades. • Adding numerous suggested third-party resources.	2. (cont.) OPSC incorporated the stakeholder’s suggestion to add specific third-party resources to Appendix 4 of the Guidelines document. These links to additional resources will facilitate school districts’ ability to access more information about climate resilience and sustainability, as well as long-term cost reduction that can be associated with these measures. Additionally, the stakeholder’s full input letter is attached for reference as part of Attachment A7g.
3. The stakeholder requests clarification regarding the definition of “instructional purposes” in the proposed school facilities inventory requirements, particularly whether	3. OPSC acknowledges and appreciates the stakeholder’s feedback and recommendation. In review of the guiding statutes, specifically

STAFF ANALYSIS/DISCUSSION (cont.)

Stakeholder Feedback	OPSC Response
3. (cont.) spaces such as libraries, food service areas, and multi-purpose rooms fall within its scope.	3. (cont.) 17070.54(c)(1) and (d), the requirement is that the Master Plan contain building information for all buildings “used for instructional purposes,” as well as other elements, including whether the school has a cafeteria or multi-purpose room, a library, and/or a gymnasium. In accordance with the statutory requirements in EC Section 17070.54(d)(6), the Master Plan inventory must indicate whether each school in the district has these types of facilities. Additionally, OPSC proposes that the Master Plan inventory must indicate whether each school in the district has a hybrid gymnasium/multipurpose room, an auditorium/performing arts facility, athletic facilities, and/or Career Technical Education facilities. Staff is not proposing a requirement to include non-instructional spaces beyond the facility types described above as part of the Master Plan. Staff has, however, recommended that non-instructional spaces be included in the Master Plan Guidelines document, as part of a complete evaluation of each school site and an integral part of the overall planning for the site. The term “instructional purpose” is not defined in the statute. OPSC looked at how other agencies define facilities used for instructional purposes. The Division of the State Architect’s (DSA) administrative code states that any school building designed for occupancy by students and staff would be considered used for instructional purposes. The California Department of Education (CDE) recommends in its <i>Guide to Development of Long-Range Facilities Plan</i> that a summary of the utilization, capacities, and

STAFF ANALYSIS/DISCUSSION (cont.)

Stakeholder Feedback	OPSC Response
	3. (cont.) evaluations of all district facilities, be included in a Master Plan. These further support OPSC’s intention to <i>recommend</i> inclusion of all facilities, even non-instructional facilities and inactive school sites, as part of a district’s overall Master Plan.
4. The stakeholder recommends amending the proposed language in SFP Regulation Section 1859.18.1(f)(1) that requires submission of a Master Plan for Natural Disaster Assistance Program applications with “the 100 percent Form SAB 50-06” to instead reference the “Final Expenditure Report Form SAB 50-06.”	4. OPSC made a clarifying edit to the proposed language to insert an inadvertently omitted word, clarifying that the Master Plan is required for Natural Disaster Assistance Program applications by the time of submittal of the 100 percent <i>complete</i> Form SAB 50-06. OPSC maintained the reference to the “100 percent complete Form SAB 50-06” rather than modifying as suggested to the “final Form SAB 50-06” to maintain greater specificity in the requirement.
5. The stakeholder seeks clarification on whether all district-owned sites, including non-school facilities, closed school campuses, and support sites such as district offices and maintenance and operations centers must be included in the Master Plan.	5. OPSC acknowledges and appreciates the stakeholder’s feedback. Pursuant to Education Code Section 17070.54(c), the Master Plan must include, at a minimum, an inventory of existing facilities, sites, and property as outlined in subdivision (d), which specifically references school sites. The inclusion of non-school facilities, such as closed school sites or support properties, is not required in the proposed regulations, but OPSC recommends that districts include them so that the Master Plan is comprised of a complete evaluation of the district’s facilities. This recommendation is included in the Master Plan Guidelines document.
6. The stakeholder expresses concern that requiring pupil capacity by grade level is overly complex and impractical, especially given mixed-grade instruction	6. EC Section 17070.54(c)(2) states that the Master Plan must contain existing classroom capacity as determined in Sections 17071.10 and 17071.25, which

STAFF ANALYSIS/DISCUSSION (cont.)

Stakeholder Feedback	OPSC Response
6. (cont.) in secondary schools and uniform classroom sizes in elementary schools. The stakeholder suggests revising Section 3 of the proposed Form SAB 50-MP to allow capacity reporting based on SFP loading ratios used for grants and Education Code compliance.	6. (cont.) discuss existing school building capacity and state loading standards on a per classroom basis, which is then reflected in proposed SFP Regulation Section 1859.18(d)(3). Reporting of pupil capacity following these standards is consistent with SFP loading standards and is required for determination of SFP funding eligibility for grades TK through 12, and both Severe and Non-Severe Special Day Class (SDC) pupil classifications. For mixed-grade instruction, the district should report the grade category that best represents the instruction occurring in those facilities in one of the following categories: • TK – 6 (25 pupils per classroom) • 7 – 12 (27 pupils per classroom) • SDC Non-Severe (13 pupils per classroom) • SDC Severe (9 pupils per classroom)
7. The stakeholder notes that “Enrollment growth” should be changed to “Enrollment change” because many district are in declining enrollment.	7. OPSC acknowledges and appreciates the stakeholder’s feedback and recommendation. OPSC agrees and updated the term “enrollment growth” to “enrollment changes” in proposed SFP Regulation 1859.18(d)(4).
8. The stakeholder notes that, under the proposed language, a district would be prohibited from submitting a Master Plan older than five years, even with a certification of material changes. The stakeholder seeks confirmation that the plan must fall within the five-year window to be considered valid.	8. OPSC acknowledges and appreciates the stakeholder’s input. In accordance with proposed SFP Regulation Section 1859.18(a), OPSC will consider the date of local school board approval of the Master Plan as the commencement of its five-year validity period. This approval affirms that the Master Plan remains current and applicable for five years from that date. Pursuant to proposed SFP Regulation Section 1859.18(b), if any changes in enrollment, capacity,

STAFF ANALYSIS/DISCUSSION (cont.)

Stakeholder Feedback	OPSC Response
	8. (cont.) or other areas have materially affected required components of the Master Plan, any new applications submitted within this five-year window must include either an updated Master Plan with all required information or a resolution approved by the local governing board that updates the required Master Plan components that were materially affected. If no material changes have occurred to required components of the Master Plan within its five-year validity period, the applicant will make the corresponding certification on the application form, as proposed.
9. The stakeholder seeks clarification regarding the procedural requirements and timing associated with Master Plan submissions. Specifically, there is uncertainty as to whether school districts are permitted to submit a Master Plan at any point in time, or if such submissions must be directly tied to or occur concurrently with a funding application.	9. OPSC acknowledges and appreciates the stakeholder's feedback. OPSC will accept a district's Master Plan only upon submission or processing of the initial application that requires it. OPSC has included an updated version of tables presenting the timelines for submittal of a completed Master Plan by program and application type at the end of this item, which 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.
10. The stakeholder seeks clarification on whether pupil capacity should be reported using district loading standards or the SFP loading standards.	10. OPSC acknowledges and appreciates the stakeholder's feedback. OPSC recommends that both elements be addressed within the Master Plan. The SFP loading standard should be used to project potential state funding, while districts may also incorporate local capacity planning based on locally adopted loading standards to reflect community-specific needs.

STAFF ANALYSIS/DISCUSSION (cont.)

Summary of Proposed SFP Regulations

At the August 28, 2025 stakeholder meeting, OPSC proposed 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 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 these proposed changes can be found on the agenda for the August 28 stakeholder meeting [here](#).

Attachment A7b contains the updated proposed SFP regulatory amendments. Changes to the previously proposed SFP regulatory amendments since the August stakeholder meeting are summarized below.

Proposed SFP Regulation Sections 1859.18 and 1859.18.1

Staff made conforming edits to refer to requirements for school districts to submit a “complete and valid” Master Plan throughout the proposed regulations, increasing consistency of terminology compared to previously inconsistent use of “complete” or “valid” in reference to the Master Plan.

Proposed SFP Regulation Section 1859.18(d)(4)

Staff amended this section to clarify the Master Plan shall include projected enrollment changes over the next five years, inclusive of growth or decline.

Proposed SFP Regulation Section 1859.18.1 – Master Plan Submittal Time Frames

Staff made non-substantive edits to the Master Plan Submittal timeline requirements for the Facility Hardship/Seismic Mitigation, Career Technical Education Facilities, and Charter School Facilities programs. These non-substantive changes clarify that the timeline for required submittal of the Master Plan is within 18 months of fund release, or concurrently with submittal of the 100 percent complete Form SAB 50-06 if it is submitted less than 18 months following fund release. OPSC proposes these changes to clarify the language regarding the required timelines, which remain substantively consistent with the current Board policies (with the substantial progress certification [due 18 months after fund release] or with the 100 percent complete Form SAB 50-06, whichever occurs first).

STAFF ANALYSIS/DISCUSSION (cont.)

For ease of reference, OPSC is again including the tables below to present the timelines for submittal of a completed Master Plan by program and application type, and 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. The tables have been updated for clarification based on the feedback mentioned in question and answer #1 above. 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 OAL has been completed.

New Construction and Modernization Applications (Full Grant) (including projects already Board-approved for Separate Design/Site)		
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	When the full grant funding application is submitted to OPSC
*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.)

New Construction and Modernization Applications for Design and/or Site Funding (New Requests)		
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 for design and/or site funding*	A Master Plan is not required to be submitted until the full grant funding application is submitted to OPSC. See prior table above for full grant applications.
>12 months after OAL approval of Regulations	At the time of application submittal for design and/or site funding	A Master Plan is not required until the full grant funding application is submitted to OPSC. See prior table above for full grant applications.
*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*	Within 18 months of fund release, or concurrently with submittal of the 100 percent complete <i>Expenditure Report</i> (Form SAB 50-06) if it is submitted less than 18 months following fund release
*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 (CTEFP) 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	Within 18 months of fund release, or concurrently with submittal of the 100 percent complete Form SAB 50-06 if it is submitted less than 18 months following fund release
*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	Within 18 months of fund release, or concurrently with submittal of the 100 percent complete Form SAB 50-06 if it is submitted less than 18 months following fund release
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.

No further changes are proposed at this time, compared to the version discussed at the August stakeholder meeting. 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). Preliminary drafts of the aforementioned forms are included for stakeholder review.

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 corrected one regulatory cross-reference within the certification language from the August stakeholder meeting, and added clarifying language to the certifications proposed for the Form SAB 50-09 and the Form SAB 50-10 to indicate that they only apply to school district applicants to the CSFP and CTEFP, respectively. No further changes to the certification are proposed at this time, compared to the version discussed at the August stakeholder meeting. Attachment A7f contains the forms in their entirety with the proposed certification included.

NEXT STEPS

OPSC welcomes further feedback on these topics.

Staff will review any feedback obtained in today's meeting and anything received through close of business on Friday, November 21, 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.

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

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“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 complete and 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 complete and valid Master Plan, the School District may submit additional applications for funding to OPSC without resubmitting the previous, complete and 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 complete and 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, complete and 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 complete and valid Master Plan, the School District shall submit an updated, complete and 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 complete and 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.
- (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 changes for the School District over the next five years, accounting for changes 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 and valid Master Plan and a local governing board resolution, as applicable, to OPSC within the time frames stated below. If a complete and valid 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 and valid Master Plan must be submitted within 18 months of fund release, or concurrently with submittal of the 100 percent complete Form SAB 50-06 if it is submitted less than 18 months following fund release.

- (2) A local governing board resolution acknowledging the Apportionment may be rescinded for failure to submit a complete and 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 and valid 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 complete and 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 and valid 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 complete and 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 and valid Master Plan must be submitted within 18 months of fund release, or concurrently with submittal of the 100 percent complete Form SAB 50-06 if it is submitted less than 18 months following fund release.
 - (2) A local governing board resolution acknowledging the Apportionment may be rescinded for failure to submit a complete and 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 and valid Master Plan must be submitted within 18 months of fund release, or concurrently with submittal of the 100 percent complete Form SAB 50-06 if it is submitted less than 18 months following fund release.
 - (2) A local governing board resolution acknowledging the Apportionment may be rescinded for failure to submit a complete and 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 complete and 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 Apportionment.
- (f) Applicants to the Natural Disaster Assistance Program in Sections 1859.84, 1859.84.1, and 1859.81.2 must submit a complete and valid Master Plan as follows:
 - (1) A complete and valid Master Plan must be submitted by the time of submittal of the 100 percent complete Form SAB 50-06.
 - (2) A local governing board resolution acknowledging the Apportionment may be rescinded for failure to submit a complete and 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.

- 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 change 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)

STATE ALLOCATION BOARD
 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 November 6, 2025

PROPOSED GUIDELINES FOR A FIVE-YEAR SCHOOL FACILITIES MASTER PLAN

PURPOSE

To continue discussion of 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 (inclusive of county offices of education) submit a five-year school facilities master plan, or an updated five-year school facilities master plan, approved by the local 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 three previous stakeholder meetings on February 13, 2025, April 10, 2025, and August 28, 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 revised draft of the guidelines document required by the statute (Attachment A7e) to assist school districts with the planning and development of a compliant 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 updated the draft of School Facility Program Guidelines for the Five-Year School Facilities Master Plan (Guidelines). A summary of the revised Guidelines is presented below for stakeholder review and further feedback.

STAFF ANALYSIS/DISCUSSION (cont.)

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

The proposed 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.

The following summary of the Guidelines highlights changes from the Guidelines previously presented at the August 28 stakeholder meeting. In addition to the changes summarized below, the latest version of the draft Guidelines includes conforming edits to align to changes in the latest version of the proposed Master Plan regulations, which are summarized separately in Attachment A7.

Chapter 2: Regulatory Requirements

Chapter 2 of the Guidelines was previously titled *Statutory Requirements*. Because the proposed SFP Regulations had not yet been drafted during the initial conception of the Guidelines, each subsection of the chapter included an introductory paragraph that referenced the applicable statute. The updated Guidelines include references throughout Chapter 2 to the proposed regulatory authority in Sections 1859.18 or 1859.18.1, which are included as Attachment A7b of this meeting report.

Appendices

The Appendices have been expanded to provide a distinction between State Agency Resources and Additional Resources.

State Agency Resources includes additional agency websites recommended by stakeholders, that provide helpful information to assist in the creation of a Master Plan.

Additional Resources serves as a bibliography of stakeholders who contributed feedback to the Master Plan topic. Stakeholders have been categorized by their area of expertise for ease of reference. Those interested in learning more about a particular field may explore the linked websites or reach out directly to the organizations themselves.

OPSC would like to note that the Guidelines are intended be a living document that will be updated regularly as new policies and programs are implemented into the SFP.

NEXT STEPS

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

Staff will review any feedback obtained in today's meeting and anything received through close of business on Friday, November 21, 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.

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
Office of Public School Construction
707 Third Street West Sacramento, CA 95605
916.376.1771 Tel
916.376.5332 Fax
www.dgs.ca.gov/opsc

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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:

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"

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 within 18 months of fund release, or concurrently with submittal of the 100 percent complete *Expenditure Report* (Form SAB 50-06) if it is submitted less than 18 months following fund release.
- 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 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	When is a Board Resolution Required?	When is Master Plan required?
On or after October 31, 2024	At the time of application submittal*	Within 18 months of fund release, or concurrently with submittal of the 100 percent complete <i>Expenditure Report</i> (Form SAB 50-06) if it is submitted less than 18 months following fund release
*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 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 (Full Grant) (including projects already Board-approved for Separate Design/Site)		
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	When the full grant funding application is submitted to OPSC
*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 (New Requests)		
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 for full funding*	A Master Plan is not required to be submitted until the full grant funding application is submitted to OPSC. See prior table above for full grant applications.
>12 months after OAL approval of Regulations	At the time of application submittal for full funding	A Master Plan is not required until the full grant funding application is submitted to OPSC. See prior table above for full grant applications.
*Applications submitted between October 31, 2024 and December 3, 2024 were provided a 60-day notification to submit the required board resolution.		

Career Technical Education Facilities Program Applications

- For CTEFP applications, submittal of the Master Plan will be required within 18 months of fund release, or concurrently with submittal of the 100 percent complete Form SAB 50-06 if it is submitted less than 18 months following fund release.

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	Within 18 months of fund release, or concurrently with submittal of the 100 percent complete Form SAB 50-06 if it is submitted less than 18 months following fund release.
*Joint Powers Authorities are exempt from the Master Plan requirement.		

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 within 18 months of fund release, or concurrently with submittal of the 100 percent complete Form SAB 50-06 if it is submitted less than 18 months following fund release.
- 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.

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	Within 18 months of fund release, or concurrently with submittal of the 100 percent complete Form SAB 50-06 if it is submitted less than 18 months following fund release.
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

- 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.

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 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.

• 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

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: Regulatory Requirements

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Introduction

This chapter outlines each of the regulatory 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) through (c) of SFP Regulation Section 1859.18 state:

- (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 complete and valid Master Plan, the School District may submit additional applications for funding to OPSC without resubmitting the previous, complete and 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 complete and 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, complete and 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 complete and valid Master Plan, the School District shall submit an updated, complete and 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.

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

Pursuant to SFP Regulation Section 1859.18(d)(1), the Master Plan shall include:

An estimate of the School District's eligibility for state bond funding pursuant to Education Code Section 17070.54(b)...

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 regulatory requirements, a school district must submit a narrative that speaks to its existing and future eligibility, as follows:

- 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 required.
- Provide a narrative describing the School District's eligibility and potential funding for state bond funding pursuant to any other program under EC 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

Pursuant to SFP Regulation Section 1859.18(d)(2), the Master Plan shall include:

An inventory of existing school facilities, sites, and property for each school in the School District...

Regulation 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. 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.
- 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 kitchen
 - A multipurpose room or hybrid multipurpose room
 - A library
 - A gymnasium or hybrid gymnasium
 - An auditorium and/or performing arts facility
 - Athletic facilities, including but not limited to, pools, stadiums, etc.
 - Career Technical education facilities, including but not limited to, barns, shops,

and outdoor student work areas.

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.



Pursuant to Education Code Section 17070.54(c), the School Facilities Master Plan must include, at a minimum, an inventory of existing facilities, sites, and property as outlined in subdivision (d), which specifically references school sites. While additional facilities such as closed school sites or support properties are not explicitly addressed in current statute or regulations, OPSC recommends including them so that the master plan is comprised of a complete evaluation of the district's facilities.

Additionally, CDE's *Guide to Development of Long Range Facilities Plan, 1986*, recommends summarizing the utilization, capacities, and evaluations of all district facilities. Inclusion of non-instructional spaces and inactive school sites to the School District's inventory helps to provide a clear understanding of existing capacity and any potential for repurposing or redevelopment.

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

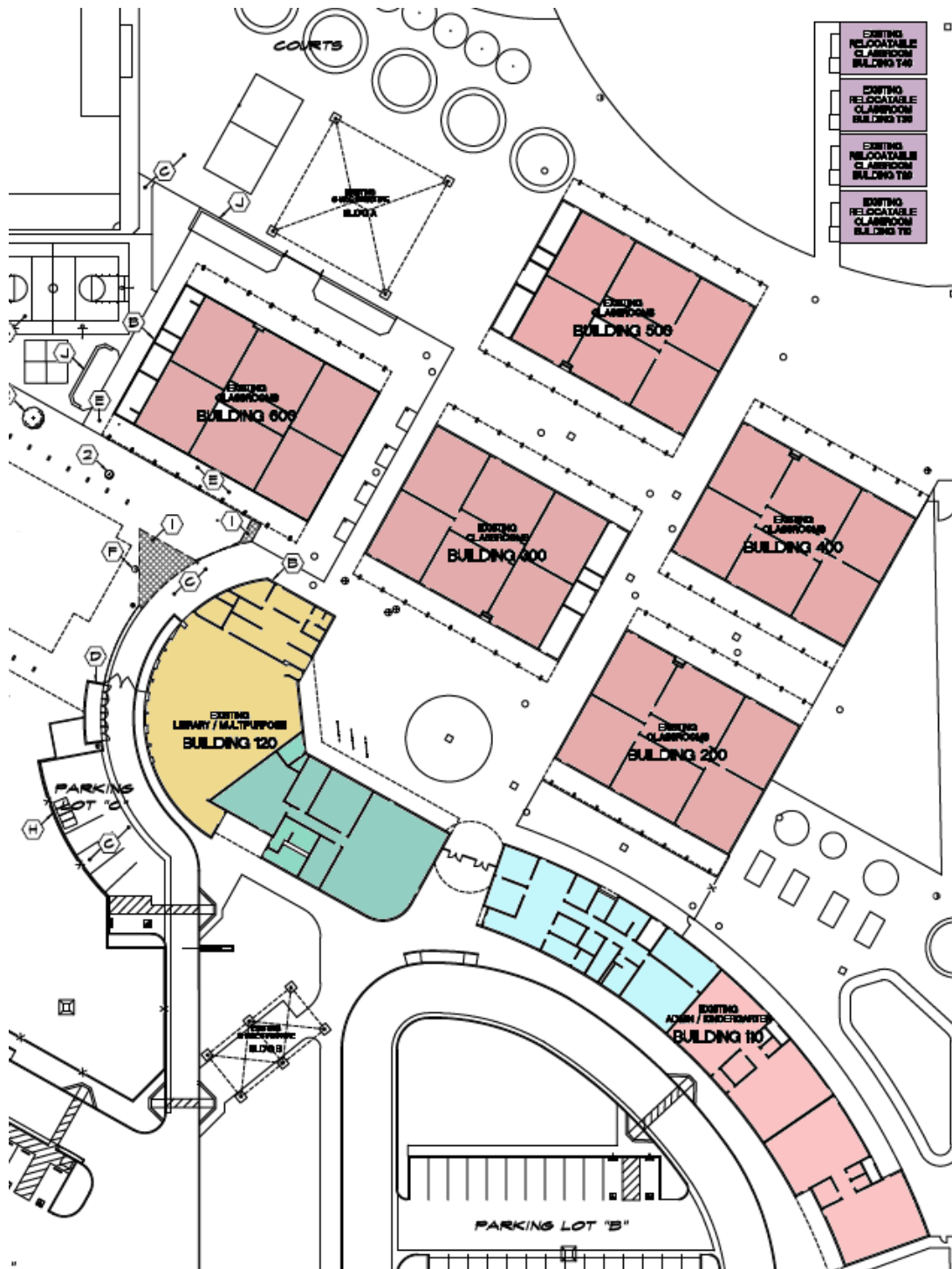


Table A

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
			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	
Square Footage Break Out			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

Pursuant to SFP Regulation Section 1859.18(d)(3), the Master Plan shall include:

Existing classroom capacity at each school site, as determined pursuant to Education Code Sections 17071.10 and 17071.25.

Regulation 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

Pursuant to SFP Regulation Section 1859.18(d)(4), the Master Plan shall include:

Projected enrollment changes for the School District over the next five years, accounting for changes pursuant to Education Code Sections 17071.75 and 17071.76.

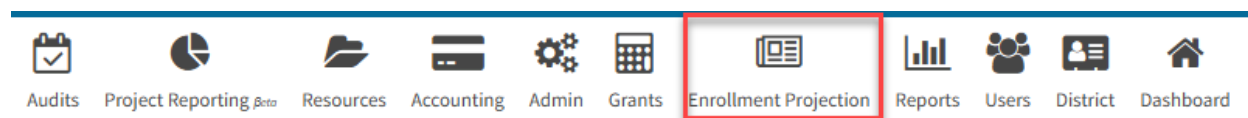
Regulation requires the Master Plan to include projected enrollment change information over the five years after the Master Plan submittal. The School Facility Program's *Enrollment Certification/Projection* (Form SAB 50-01) can be used for this purpose, part or in whole, depending on whether the application 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

	7th Prev.	6th Prev.	5th Prev.	4th Prev.	3rd Prev.	2nd Prev.	Previous	Current
Grade	/	/	/	/	/	/	/	/
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

Pursuant to SFP Regulation Section 1859.18(d)(5), the Master Plan shall include:

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.

Regulation 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

Pursuant to SFP Regulation Section 1859.18(d)(6), the Master Plan shall include:

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.

Regulation 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 HARDSHIP WORKSHEET			
CURRENT FINANCIAL CONDITION OF DISTRICT TO SUPPORT FINANCIAL HARDSHIP REQUEST			
DISTRICT	COUNTY		
<i>CAPITAL PROJECT FUND</i>			
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

Pursuant to SFP Regulation Section 1859.18(d)(7), the Master Plan shall include:

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.

Regulation 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

Pursuant to SFP Regulation Section 1859.18(d)(8), the Master Plan shall include:

The School District's deferred maintenance plan certified by the local governing board pursuant to Education Code Section 17070.75.

Regulation 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
• Carpeting • Asphalt Tile and Vinyl Asbestos Tile • Hardwood Floors	• Interior of classrooms, library, offices, hallways, cafeteria, restrooms, etc. • Exterior stucco, masonry, wood, and metal trim	• Panels and boards • Signal systems, including fire alarms and public address • Conductors and cables	• Substandard incandescent lighting and obsolete fluorescent lighting • Fixtures

ATTACHMENT A7e

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 ○ Boilers ○ Piping ○ Individual heating units except gas-fired wall heaters • Ventilation and Air-Conditioning Systems ○ 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	FIVE-DIGIT DISTRICT CODE NUMBER (SEE CALIFORNIA PUBLIC SCHOOL DIRECTORY)
OPSC School District	12345
COUNTY	CURRENT FISCAL YEAR
Sacramento	2026

The district:

- ☒ has not previously submitted a Five Year Plan.
☐ Is submitting this updated/revsed 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
John Smith	Superintendent
BUSINESS ADDRESS	TELEPHONE NUMBER
707 Third Street	(916) 376-1771
E-MAIL ADDRESS	FAX NUMBER
opsccommunications@dgs.ca.gov	(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

Pursuant to SFP Regulation Section 1859.18(d)(9), the Master Plan shall include:

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.

Regulation 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.

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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 school site, 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)
May, 1977
 (Rev. March, 1985)

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:

This image shows a single sheet of white paper with horizontal blue or grey ruling lines. The lines are evenly spaced and run across the width of the page. There is no handwriting or other markings on the paper.

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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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 _____; 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 – State Agency 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.

[California Collaborative for Educational Excellence](#)

The California Collaborative for Educational Excellence was established in 2013 by California *Education Code (EC)* Section 52074 to provide advice and assistance to school districts, county offices of education, and charter schools in achieving the goals set forth in their Local Control Accountability Plan.

[California Collaborative for Educational Excellence: School Climate Resilience Toolkit](#)

This toolkit from CCEE is designed to support school and district leaders to implement climate adaptation strategies, showcasing best practices from districts that have successfully addressed climate-related challenges like energy and grid resilience, extreme heat mitigation, stormwater management, and wildfire preparedness. This valuable resource provides practical tools and guidance to help schools take immediate steps toward building a more resilient and sustainable future.

[CalOES School Emergency Planning & Safety](#)

The California Governor's Office of Emergency Services (CalOES) provides resources in school safety planning.

[Cal OES and CDE guide: California Emergency Management for Schools: A Guide for Districts and Sites](#)

This guide, developed in collaboration between Cal OES and CDE, is a tool to assist in implementing comprehensive school safety planning and provides relevant information, resources, and tools for educational administrators, faculty, and staff.

[CDE Guide to Development of Long Range Facilities Plan](#)

This is a guide to assist school administrator and facilities planners with the development of a long-range facilities plan.

[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.

[California Energy Codes & Standards: CALGreen Resources Repository](#)

This website is hosted by California Energy Codes & Standards and is a central location with information from subject matter experts on California Green Building Standards Code, Part 11 of Title 24 (CALGreen) requirements. Here you will find guides, presentations, toolkits and factsheets, among many other resources to help you apply the regulations to your project.

[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.

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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.

Appendix 4 – Additional Resources

This document is the result of numerous stakeholder meetings and extensive feedback received on Five Year Facilities Master Plan. The list below serves as a compilation of organizations that have participated in stakeholder meeting discussions and contributed feedback to shape the development of policies and regulations related to the Master Plan. Stakeholders have been grouped according to their respective areas of interest.

Climate and Environmental Advocacy

- [Alliance for a Better Community](#)
- [California Alliance for Clean Air](#)
- [California Nurses for Environmental Health and Justice](#)
- [Center for Cities + Schools](#)
- [University of California Berkeley](#)
- [Center for Ecoliteracy](#)
- [Clean Air Allies](#)
- [Climate Action Campaign](#)
- [Climate Ready Schools Coalition](#)
- [Elders Climate Action Southern California](#)
- [Green Schoolyards America](#)
- [Jobs with Justice San Francisco](#)
- [Splash: Water and Wildlife Education](#)
- [Ten Strands](#)
- [TreePeople](#)

Consulting Groups

- [CL Consulting, Inc.](#)
- [Hancock Park & DeLong, Inc.](#)
- [Jack Schreder & Associates, Inc.](#)
- [King, Inc.](#)
- [TRiGroup, Inc.](#)

Architect and Design Firms

- [HED Architecture](#)
- [K12 School Facilities](#)
- [KBZ Architects](#)
- [LPA Design Studios](#)
- [Perkins Eastman Design](#)
- [New Buildings Institute](#)
- [Ruhnau Clarke Architects](#)

Local Educational Agencies

- [Eden Area ROP](#)
- [Jurupa Unified School District](#)
- [Los Angeles Unified School District](#)
- [Santa Ana Unified School District](#)

Student and District Advocacy

- [California Federation of Teachers](#)
- [California State PTA](#)
- [Children Now](#)
- [Coalition for Adequate Student Housing](#)
- [Generation Up](#)
- [Small School Districts' Association](#)
- [Undaunted K12](#)

**APPLICATION FOR FUNDING
SCHOOL FACILITY PROGRAM**

SAB 50-04 (REV 08/25XX/XX)

ATTACHMENT A7f**GENERAL INFORMATION**

If this application is submitted when there is Insufficient Bond Authority, as defined in Regulation Section 1859.2, the School District must adopt and submit a school board resolution, pursuant to Regulation Section 1859.95.1. For information regarding remaining bond authority, contact the Office of Public School Construction (OPSC) prior to submittal of this application.

If not previously submitted, a district may file an application for modernization funding by use of this form concurrently with a determination of or an adjustment to the district's modernization eligibility. The district must submit a determination of or an adjustment to the district's new construction baseline eligibility upon request, as described in Regulation Sections 1859.51 or 1859.70, as applicable. The Board will only provide new construction funding if this form is submitted prior to the date of occupancy of any classrooms included in the construction contract. If the district has a pending reorganization election that will result in the loss of eligibility for the proposed project, the district must submit an adjustment to the district's new construction baseline eligibility as required in Section 1859.51 upon request. This may be accomplished by completion and submittal of Form SAB 50-01, Form SAB 50-02 and Form SAB 50-03 for the current enrollment year. Failure to submit the requested Forms may result in OPSC returning the funding application to the district unprocessed.

For purposes of Education Code Section 17073.25, the California Department of Education (CDE) is permitted to file modernization applications on behalf of the California Schools for the Deaf and Blind.

Requests for funding may be made as follows:

1. A separate apportionment for site acquisition for a new construction project for environmental hardship pursuant to Section 1859.75.1. For purposes of this apportionment, the following documents must be submitted with this form (as appropriate):
 - Form SAB 50-01, Form SAB 50-02 and Form SAB 50-03 (if not previously submitted).
 - Contingent site approval letter from the CDE.
 - Preliminary appraisal of property.
 - Approval letter from the Department of Toxic Substances Control.
2. A separate apportionment for site acquisition and/or design costs for a new construction project pursuant to Section 1859.81.1. This apportionment is available only to districts that meet the financial hardship criteria in Section 1859.81. Districts may apply for a separate apportionment for the design and for site acquisition on the same project. For purposes of this apportionment, the following documents must be submitted with this form (as appropriate):
 - Form SAB 50-01, Form SAB 50-02 and Form SAB 50-03 (if not previously submitted).
 - Contingent site approval letter from the CDE (site apportionment only).
 - Preliminary appraisal of property (site apportionment only).
3. A separate apportionment for district-owned site acquisition cost pursuant to Section 1859.81.2. For purposes of this apportionment, the following documents must be submitted with this form (as appropriate):
 - Form SAB 50-01, Form SAB 50-02 and Form SAB 50-03 (if not previously submitted).
 - Site approval letter from the CDE.
 - Appraisal of district-owned site.
 - Cost benefit analysis as prescribed in Section 1859.74.6 or a copy of the Board finding that the non-school function on the district-owned site must be relocated.
4. A separate apportionment for design cost for a modernization project pursuant to Section 1859.81.1. This apportionment is available only to districts that meet the financial hardship criteria in Section 1859.81. For purposes of this apportionment, the Form SAB 50-03 must accompany this form (if not previously submitted).
5. A New Construction Adjusted Grant pursuant to Section 1859.70 or 1859.180. If the funding request includes site acquisition, the proposed site must either be owned by the district, in escrow, or the district has filed condemnation proceedings and received an order of possession of the site. For purposes of this apportionment, the following documents must be submitted with this form (as appropriate):
 - Form SAB 50-01, Form SAB 50-02 and Form SAB 50-03.
 - Site/plan approval letter from the CDE.
 - Appraisal of property if requesting site acquisition funds.
 - Plans and specifications (P&S) for the project that were approved by the DSA. Submittal of plans may be on CD-ROM or "Zip Drive" readable in AutoCAD 14. The specifications may be provided on a diskette that is IBM compatible.
 - Cost estimate of proposed site development, if requesting site development funding.
 - If this request is pursuant to Section 1859.77.2 and the district's housing plan is other than those listed in the certification section of this form, a copy of the school board resolution and the approved housing plan.
 - If the site apportionment is requested pursuant to Regulation Section 1859.74.5, a cost benefit analysis as prescribed in Regulation Section 1859.74.6 or a copy of the Board finding that the non-school function on the district-owned site must be relocated.
 - If this request is fully or partially based on eligibility derived from an Alternative Enrollment Projection, a justification of how the project relieves overcrowding, including but not limited to, the elimination of the use of Concept 6 calendars, four track year-round calendars, or bussing in excess of 40 minutes.
 - Written confirmation from the district's career technical advisory committee indicating that the need for vocational and career technical facilities is being adequately met within the district consistent with Education Code Sections 51224, 51225.3(b), 51228(b), and 52336.1.
6. For purposes of the Overcrowding Relief Grant (ORG), districts must submit the Overcrowding Relief Grant District-Wide Eligibility Determination (Form SAB 50-11) prior to the submittal of this funding application. In addition, districts must have had the CDE deem the site eligible for the ORG (pursuant to Section 1859.181) prior to the submittal of this application. For purposes of this apportionment, the following documents must be submitted with this form as well as the documents listed in section 5 above:
 - Overcrowding Relief Grant Eligibility Determination Form approved by the CDE.
 - Copies of the supporting documentation provided to the CDE when determining the density of the site, including the site diagram.

The district is not required to submit its current CBEDS enrollment data.
7. Modernization Adjusted Grant pursuant to Section 1859.70. For purposes of this apportionment, the following documents must be submitted with this form (as appropriate):
 - Form SAB 50-03 (if not previously submitted).
 - P&S for the project that were approved by the DSA.
 - If the request includes funding for accessibility and fire code requirement pursuant to Section 1859.83(f), the DSA approved list of the minimum accessibility work required and a detailed cost estimate for the work in the plans.

APPLICATION FOR FUNDING SCHOOL FACILITY PROGRAM

SAB 50-04 (REV 08/25XX/XX)

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- DSA approval letter for elevator to meet access compliance, if funding is requested.
 - Cost estimate of the proposed site development necessary for the Reconfiguration of an existing high school.
 - Plan approval letter from the CDE.
 - Districtwide enrollment data on Form SAB 50-01 when requesting project assistance (if not previously submitted).
 - If the request includes funding for 50 year old permanent buildings pursuant to Section 1859.78.6, a site diagram identifying all buildings to be modernized in the project. The diagram must specify those buildings that are at least 50 years old.
 - Written confirmation from the district's career technical advisory committee indicating that the need for vocational and career technical facilities is being adequately met within the district consistent with Education Code Sections 51224, 51225.3(b), 51228(b), and 52336.1.
 - For requests to replace 75 Years or Older Building(s) per Section 1859.78.7.1, the district must submit the following:
 - A completed *75 Years or Older Building Cost Estimate and Cost/Benefit Analysis* (Form SAB 57-75).
 - A copy of the demolition plans, or other supporting documentation, that demonstrate the demolition of the qualifying 75 Years or Older Building(s).
 - A detailed cost estimate that delineates the cost associated with the work to demolish and replace the qualifying 75 Years or Older Building(s), inclusive of the allowable site development costs per Section 1859.78.7.1, apart from the other Modernization work in the DSA-approved plans.
 - If the request includes funding for the construction of a Minimum Essential Facility (MEF) per Section 1859.78.9.1, or a Transitional Kindergarten classroom(s) per Section 1859.78.9.2, the district must submit a detailed cost estimate that delineates the cost associated with the work for the qualifying facility(s) in the DSA-approved plans apart from the other Modernization work in the DSA-approved plans.
8. Final Charter School Apportionment for Charter School Facilities Rehabilitation pursuant to Section 1859.167.1. For purposes of this apportionment, the following documents must be submitted with this form (as appropriate):
- P&S for the project that were approved by DSA.
 - If the request includes funding for accessibility and fire code requirement pursuant to Section 1859.167.3(d), the DSA approved list of the minimum accessibility work required and a detailed cost estimate for the work in the plans.
 - DSA approval letter for elevator to meet access compliance, if funding is requested.
 - High performance incentive (HPI) scorecard from DSA.
 - Plan approval letter from the CDE.
 - Construction cost estimate signed by the architect of record or design professional.
 - Determination of financial soundness from the California School Finance Authority (CSFA).
 - Written confirmation from the applicant's career technical advisory committee indicating that the need for vocational and career technical facilities is being adequately met within the district consistent with Education Code Sections 51224, 51225.3(b), 51228(b), and 52336.1.

9. If the application includes a request for Financial Hardship, the district must comply with the requirements of Section 1859.81.

- If the application is submitted when there is Insufficient Bond Authority, as defined in Section 1859.2, the district must adopt a school board resolution pursuant to Section 1859.95.1(b).

If the district is requesting New Construction funding after the initial baseline eligibility was approved by the Board and the district's current CBEDS enrollment reporting year is later than the enrollment reporting year used to determine the district's baseline eligibility or adjusted eligibility, the district must complete a new Form SAB 50-01 based on the current year CBEDS enrollment data, and submit it to the OPSC with this form. In addition, if the district's request is fully or partially based on eligibility derived from an Alternative Enrollment Projection, the district must update the Alternative Enrollment Projection to correspond with the CBEDS enrollment data for the current year. A small district with 2,500 or less enrollment as defined in Section 1859.2 will not have its eligibility reduced for a period of three years from the date the district's baseline eligibility was approved by the Board as a result of reduction in projected enrollment.

For a list of the documents that must be submitted in order for the OPSC to deem a funding request for new construction or modernization complete and ready for OPSC processing, consult the SFP handbook and other information located on the OPSC Web site at www.dgs.ca.gov/opsc.

For purposes of completing this form for a Final Charter School Apportionment, a charter school shall be treated as a school district.

SPECIFIC INSTRUCTIONS

The district must assign a Project Tracking Number (PTN) to this project. The same PTN is used by the OPSC, the DSA and the CDE for all project applications submitted to those agencies to track a particular project through the entire state application review process. If the district has already assigned a PTN to this project by prior submittal of the P&S to either the DSA or the CDE for approval, use that PTN for this application submittal. If no PTN has been previously assigned for this project, a PTN may be obtained from the OPSC Web site at www.dgs.ca.gov/opsc "PT Number Generator."

1. Type of Application

Check the appropriate box that indicates the type of School Facility Program (SFP) grant the district is requesting for purposes of new construction, modernization, a separate design and/or site apportionment, site apportionment as an environmental hardship or New Construction (Final Apportionment). If the application is for the modernization of school facilities and includes facilities that are eligible for an additional apportionment pursuant to Section 1859.78.8, include a site diagram with this application that specifies the age of each facility eligible for modernization. The diagram should also indicate the date of its original DSA plan approval and the date the facility received its prior modernization apportionment. If known include the project modernization number on the diagram. If the application is for modernization of a California School for the Deaf or Blind, the CDE shall check the box identified as Modernization of California Schools for the Deaf/Blind. If the request is for a separate design apportionment, the CDE shall check the appropriate box. If the eligibility for this project was established as a result of a health and safety threat pursuant to Section 1859.82.1, or a seismic replacement or seismic rehabilitation for the Most Vulnerable Category 2 Buildings pursuant to Section 1859.82.2, and/or the request is for a conceptual approval for a Facility Hardship application pursuant to Section 1859.82.3(a) or a Seismic Mitigation Program application pursuant to Section 1859.82.3(b), check the appropriate box(es).

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If this request is for an addition to an existing site and advance funding for the evaluation and RA costs, check the appropriate box and refer to Section 1859.74.4.

If this request is for an Overcrowding Relief Grant, check the New Construction (Overcrowding Relief Grant) box.

If this request is to convert a Preliminary Apportionment or a Preliminary Charter School Apportionment to a Final Apportionment, check the New Construction Final Apportionment, New Construction Final Charter School Apportionment or the Rehabilitation Final Charter School Apportionment box, as appropriate.

If the district is requesting a separate site and/or design apportionment, complete boxes 2a, 3, 4, the site acquisition data in box 5 (d and e), and boxes 13, 14, 15, 16, and 24 only.

2. Type of Project

- a. Select the type of project that best represents this application request and enter the total number of pupils assigned to the project for each grade group. Include pupils to be housed in a new or replacement school authorized by Section 1859.82 (a). The amount entered cannot exceed the district's baseline eligibility determined on Form SAB 50-03 and will be the basis for the amount of the new construction or modernization grants provided for the project.

If this request is for a Final Apportionment, the pupils assigned to the project must be at least 75 percent, but not more than 100 percent, of the pupils that received the Preliminary Apportionment. Refer to Section 1859.147.

For ORG projects, the amount entered cannot exceed the Overcrowding Relief Pupil Eligibility (pursuant to Section 1859.182 and 1859.183) as reflected in the total number of eligible pupils determined by the Form SAB 50-11 or the CDE Overcrowding Relief Grant Eligibility Determination form.

For Charter School Facilities Program Rehabilitation, leave the number of pupils blank.

- b. Check the box if the project is eligible for funding for 50 year or older permanent buildings and report, at the option of the district:
- The total number of eligible classrooms or the total eligible square footage building area at the site. Refer to Section 1859.78.6(b)(1)(A) or (b)(2)(A).
 - The total number of permanent classrooms or the total permanent square footage building area that is at least 50 years old and not been previously modernized with state funds. Refer to Section 1859.78.6(b)(1)(B) or (b)(2)(B).
 - Enter the greater percentage as calculated under Regulation Section 1859.78.6(b)(1)(C) or Regulation Section 1859.78.6(b)(2)(C).
 - If this project includes eligible 50 year or older pupil grants, enter the appropriate number assigned to the project for each grade group. The number of pupils entered cannot exceed the cumulative number of 50 year or older permanent buildings pupil grants requested for all modernization funding applications for the site as determined by using the percentage factor above.
- c. If this request includes pupil grants generated by an Alternative Enrollment Projection Method, enter the number of pupils by grade level.
- d. Check the box if the project is eligible for funding for 75 Years or Older Buildings and report the following, if applicable:
- The total number of eligible classrooms and/or the total eligible square

footage building area being demolished. Refer to Section 1859.78.7.1.

- The total number of eligible classrooms and/or the total eligible square footage building area being constructed. Refer to Section 1859.78.7.1.
 - Enter the appropriate number assigned to the project for each grade group. The number of pupils entered cannot exceed the cumulative number of pupil grants requested in Section 2a. and determined by using the percentage factor above.
- e. Indicate if this request is for funding of a 6–8 school and/or an Alternative Education School.
- f. Check the applicable box if the district is requesting additional pupil grants assigned to the project that exceed the capacity of the project or if the pupils assigned represent eligibility determined at another grade level and check the appropriate box to indicate under which regulation the district is applying. The pupil capacity of the project may be determined by multiplying the classrooms reported in box 3 by 25 for K–6; 27 for 7–8, 9–12 grades; 13 for non-severe and 9 for severe.
- g. Enter the square footage of the non-toilet area and toilet area contained in the Charter School Facilities Program Rehabilitation project.
- h. Indicate the site scenario that best represents the project request.
- i. For ORG projects, the district must provide the following information in the space provided:
- Name of the eligible school site(s) where portables will be replaced in this project
 - Number of portables being replaced at each school site
 - Number of site specific eligible pupils being requested for this project for each school site. The total number of site specific eligible pupils assigned to this project must equal the total number of pupils in Section 2a.

3. Number of Classrooms

Enter the:

- Number of classrooms as shown on the plans and specifications (P&S). If there was demolition at the site, report the net increase in the number of classrooms showing in the P&S.
- Master plan site size, as recommended by the California Department of Education.
- Recommended site size, as determined by the California Department of Education.
- Existing Useable Acres already owned at that location (if any).
- Proposed Useable Acres that was/will be purchased as part of the application (if any).

4. Financial Hardship Request

Check the appropriate box(es) if the district is requesting financial hardship assistance because it is unable to meet its matching share requirement.

- If the application includes a request for Financial Hardship, the district must comply with the requirements of Section 1859.81.
- If there is Insufficient Bond Authority for the type of application, check the second box and attach a school board resolution pursuant to Section 1859.95.1(b).

5. New Construction Additional Grant Request

Check the appropriate box(es) if the district requests an augmentation to the new construction grant for "additional" grants for the items listed. Refer to Sections 1859.72 through 1859.76 for eligibility criteria. Enter the:

- a. Therapy area in square feet as provided in Section 1859.72.
- b. Multilevel classrooms in the P&S pursuant to Section 1859.73.
- c. Check the box if the district is requesting project assistance pursuant to Section 1859.73.1. If the district has not submitted a request for new construction baseline eligibility on a district-wide basis, it must submit a current Form SAB 50-01 based on district-wide enrollment data with this form.

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- d. If the project the district is requesting SFP funding for does not require an RA, refer to Section 1859.74. If a RA is required on a site that is not leased or an addition to an existing site, refer to Section 1859.74.2. If RAs are required on a leased site or an addition to an existing site, refer to Sections 1859.74.3 or 1859.74.4, respectively. The limitation of 50 percent may be exceeded when unforeseen circumstances exist, the CDE determines that the site is the best available site, and substantiation that the costs are the minimum required to complete the evaluation and RA.

- 1) Enter 50 percent of the actual cost.
- 2) Enter 50 percent of the appraised value of the site. If the request is made pursuant to Regulation Section 1859.74.5, enter 50 percent of the appraised value.
- 3) Enter 50 percent of the allowable relocation cost.
- 4) Enter two percent of the lesser of the actual cost or appraised value of the site (minimum \$25,000).
- 5) Enter 50 percent of the Department of Toxic Substances Control (DTSC) fee for review and approval of the phase one environmental site assessment and preliminary endangerment assessment reports. Refer to Sections 1859.74, 1859.74.1, 1859.74.5, 1859.75, 1859.75.1 and 1859.81.1.

A project that received site acquisition funds under the Lease-Purchase Program (LPP) as a priority two project is not eligible for site acquisition funds under the SFP. A district-owned site acquired with LPP, SFP or Proposition 1A funds is not eligible for funding under Regulation Section 1859.74.5.

- e. Enter 50 percent of the amount allowable for hazardous materials/waste removal and/or remediation for the site acquired pursuant to Sections 1859.74.2, 1859.74.3, 1859.74.4, 1859.75.1 or 1859.81.1. If an RA is required, check the box.
- f. Enter 50 percent of eligible service-site development, off-site development including pedestrian safety paths and utilities costs allowed pursuant to Section 1859.76. Attach cost estimates of the proposed site development work which shall be supported and justified in the P&S. All cost estimates shall reflect 100 percent of the proposed work.

Check the box if the district is requesting an Additional Grant for General Site Development pursuant to Section 1859.76

- g. If the district is requesting an Additional Grant for Energy Efficiency pursuant to Section 1859.71.3, enter the percentage of energy efficiency that exceeds Title 24 requirements as prescribed in Section 1859.71.3(a)(3).
- h. Check the box(es) if the district requests and the project qualifies for additional funding for fire code requirements authorized in Section 1859.71.2.
- i. If the district is requesting an Additional Grant for High Performance Incentive pursuant to Section 1859.70.4, enter the number of high performance points as prescribed in Section 1859.71.6 or 1859.77.4, as appropriate, subject to Education Code Section 17070.965.

6. Modernization Additional Grant Request

- a. Check the box if the district is requesting project assistance allowance pursuant to Section 1859.78.2. If the district has not submitted a request for new construction baseline eligibility on a district-wide basis, it must submit a current Form SAB 50-01 based on district-wide enrollment data with this form.
- b. If the district is requesting an Additional Grant for Energy Efficiency pursuant to Section 1859.78.5, enter the percentage of energy efficiency that exceeds Title

24 requirements as prescribed in Section 1859.78.5(a)(3).

- c. Check the box if the district requests an additional grant for site development utility cost necessary for the modernization of 50 years or older permanent building(s). Enter 60 percent of the eligible costs allowable pursuant to Section 1859.78.7(a).
- d. Check the box if the district requests an additional grant for site development utility cost necessary for the replacement of a 75 Years or Older Building, if not already provided under the provisions pursuant to Section 1859.78.7(a). Enter 60 percent of the eligible costs allowable.
- e. Check the box(es) if the district requests and the project qualifies for additional funding for fire code requirements authorized in Section 1859.78.4.
- f. If the district is requesting an Additional Grant for High Performance Incentive pursuant to Section 1859.70.4, enter the number of high performance points as prescribed in Section 1859.77.4, subject to Education Code Section 17070.965.
- g. Check the box if the district is requesting an Additional Grant for a Minimum Essential Facility pursuant to Regulation Section 1859.78.9.1. Check the box for the type of facility being requested (if the facility is a hybrid facility, select 'Hybrid' and indicate the type of facility on the line provided) and indicate the amount of eligible Toilet and Other square footage being built in the project. Check the appropriate box depending on whether the Minimum Essential Facility is permanent or portable construction. Check the box if the district is requesting an additional grant for Site Development pursuant to Regulation Section 1859.78.9.1. At the district's option, the district may request 35 percent of the Minimum Essential Facility supplemental grant or enter 60 percent of the amount calculated pursuant to Regulation Section 1859.78.9.1(b)(7) or 1859.78.9.1(c)(7).
- h. 1) Check the box if the district is requesting an Additional Grant for Transitional Kindergarten classrooms for the construction of a new transitional kindergarten classroom(s) and/or retrofit of an existing school facility to be a transitional kindergarten classroom(s). Check the appropriate boxes if the district is augmenting the grant with additional supplemental grants respective of the transitional kindergarten classroom project scope. Check the box if the district is requesting an additional grant for Site Development pursuant to Regulation Section 1859.78.9.2. The district may choose to request 35 percent of the Transitional Kindergarten supplemental grant, or enter 60 percent of minimum work amount, pursuant to Regulation Section 1859.78.9.2(c)(4) or 1859.78.9.2(c)(5).
- h. 2) The information needed to complete this section is based on the latest California Basic Educational Data System (CBEDS) enrollment data. Applications filed on or after November 1st must include the current school year enrollment. Enter the CBEDS enrollment for grades TK-3 at the school site for the current year and the three prior years' TK-3 enrollment, as appropriate.

Requests for funding shall include the documents as follows:

- Site map that includes labelling of all facilities and their current use, and identifies all classrooms constructed or previously retrofitted to house kindergarten students.
- Narrative that explains the current classroom and facility usage at the site, what the School District plans to do with the project, and the resulting usage at the completion of the project.

7. Excessive Cost Hardship Request

Check the appropriate box to request an augmentation to the New Construction or Modernization Grants for an excessive cost hardship for the items listed. Refer to Section 1859.83 for eligibility criteria. Requests for excessive cost grants for accessibility requirements are allowed only if required by the Division of the State Architect (DSA).

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At the district's option, the district may request three percent of the modernization base grant or enter the amount calculated pursuant to Regulation Section 1859.83(f). Attach a copy of the DSA approved list that shows the minimum work necessary for accessibility requirements.

If the request is for the excessive cost grant for a new Alternative Education school pursuant to Section 1859.83(c)(2) and the district wishes to request less than the maximum allowance, please submit a letter along with application indicating the desired amount.

8. Charter School Facilities Program Rehabilitation – Additional Grant and Excessive Cost Hardship Request**Additional Grant Request**

- a. If the applicant is requesting an Additional Grant for High Performance Incentive pursuant to Section 1859.77.4, enter the number of high performance points as prescribed in Section 1859.77.4.

Excessive Cost Hardship Request

Check the appropriate box to request an augmentation to the Charter School Facilities Program Rehabilitation grants for an excessive cost hardship for the items listed. Refer to Section 1859.167.4 for eligibility criteria.

- b. Check the box if the applicant requests and qualifies for an Excessive Cost Hardship Grant due to Geographic Location pursuant to Section 1859.167.3(a).
- c. Check the box if the applicant requests and qualifies for an Excessive Cost Hardship Grant for a small size project pursuant to Section 1859.167.3(b).
- d. Check the box if the applicant requests and qualifies for an Excessive Cost Hardship Grant due to Urban Location, Security Requirements, and Impacted Site pursuant to Section 1859.167.3(c).
- e. Check the box if the applicant requests and qualifies for an Excessive Cost Hardship Grant due to accessibility and fire code requirements pursuant to Section 1859.167.3(d). Requests for excessive cost grants for accessibility requirements are allowed only if required by the Division of the State Architect (DSA). At the applicant's option, the applicant may request three percent of the Charter School Facilities Program Rehabilitation Grant or enter 50 percent of the amount calculated pursuant to Regulation Section 1859.167.3(d)(2). Attach a copy of the DSA approved list that shows the minimum work necessary for accessibility requirements.

9. Project Priority Funding Order

Enter the priority order of this project in relation to other new construction applications submitted by the district on the same date. If applications are not received on the same date, the OPSC will assign a higher district priority to the application received first. Check the box(es) if the project meets the criteria outlined in Section 1859.92(c)(3),(4) and (6), as appropriate. This information is needed for purposes of priority points.

10. Prior Approval Under the LPP

If the project the district is requesting SFP grants for received a Phase P, S, or C approval under the LPP, report the application number of that project, regardless if the project actually received funding or was included on an "unfunded" list. Failure to report this information may delay the processing of the application by the OPSC.

11. Prior Apportionment Under the SFP

If the project received a separate apportionment under the SFP for either site and/ or design, or site environmental hardship, enter the application number of the project. Failure to report this information may delay the processing of the application by the OPSC.

12. Preliminary Apportionment to a Final Apportionment

If this request is to convert a Preliminary Apportionment to a Final Apportionment, enter the application number of the Preliminary Apportionment. Failure to report this information may delay the processing of the application by the OPSC.

13. Alternative Developer Fee

The district must report certain alternative fees collected pursuant to Government Code Section 65995.7, as of the date of application submittal to the OPSC. Refer to Section 1859.77 for details. Districts are advised that the OPSC may perform an audit of the developer fees collected prior to application approval by the Board.

14. Adjustment to New Construction Baseline Eligibility

Pursuant to Section 1859.51 certain adjustments to the district's new construction baseline eligibility must be made each time a district submits Form SAB 50-04, to the OPSC for SFP new construction or modernization grants. These adjustments are made by the OPSC based on information reported by the district on this form.

- a. Report all classroom(s) provided after the district submitted its request for determination of its new construction baseline eligibility for the grades shown, or indicate N/A if there are none. Refer to Section 1859.51(i).

In the additional classroom column, indicate the number of additional net classrooms provided if not previously reported.

In the replacement classroom column, indicate the number of classrooms that were included in the determination of the district's new construction eligibility pursuant to Education Code Section 17071.75 but replaced in a locally funded project.

Enter the date the initial construction contract was signed for additional or replacement classrooms.

15. Pending Reorganization Election

Complete only for new construction projects. Indicate if there is a pending reorganization election that will result in a loss of eligibility for this project. If the answer is "yes", the district must complete Form SAB 50-01, Form SAB 50-02 and Form SAB 50-03, to adjust the district's new construction baseline eligibility as a result of the reorganization and submit them with this form.

16. Joint-Use Facility/Leased Property

Check the box if:

- a. The facilities to be constructed/modernized as part of this project will be for joint use by other governmental agencies.
- b. The new construction or modernization grants will be used for facilities located or to be located on leased property.

17. Project Progress Dates

- a. Enter the date(s) the construction contract(s) was awarded for this project(s). If a construction contract has not been executed, enter N/A. (If the space provided is not sufficient for all applicable contract dates, please list all dates on a separate attachment to this form.)
- b. Enter the issue date(s) for the Notice to Proceed for the construction phase of the project, or enter N/A if a Notice to Proceed has not been issued.
- c. If a construction contract was awarded prior to January 1, 2012, check the appropriate box to indicate whether or not the district has initiated and enforced a Labor Compliance Program (LCP) approved by the Department of Industrial Relations (DIR) pursuant to Labor Code Section 1771.7 for this project.

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18. Prevailing Wage Monitoring and Enforcement Costs

If the construction contract(s) for this project was awarded on January 1, 2012 through June 19, 2014, check the appropriate box to indicate which of the following methods was or is being used to meet the requirement for prevailing wage monitoring and enforcement pursuant to Labor Code Section 1771.3 in effect on January 1, 2012 through June 19, 2014:

- DIR Public Works administration and enforcement
- A DIR-approved internal LCP
- A collective bargaining agreement that meets the criteria set forth in Labor Code Section 1771.3(b)(3) in effect on January 1, 2012 through June 19, 2014.

19. Construction Delivery Method

Check the box that best represents the construction delivery method that the district has or will use for this project, if known.

20. Career Technical Education Funds Request

Indicate if Career Technical Education (CTE) funds will be requested for classroom(s) included in the plans and specifications for this project pursuant to Section 1859.193. If "Yes", enter the number of CTE classroom(s) shown on the P&S.

21. Overcrowding Relief Grant Narrative

The district must either provide an explanation in the space provided or attach a letter signed by the district representative detailing how this project will relieve overcrowding.

22. Local Funding Adjustment Grant

Enter the following:

- a. The district's total assessed valuation, pursuant to Section 1859.70.5(a)(1).
The district must provide a letter from the county auditor-controller that certifies the school district's total assessed valuation.
- b. The district's gross bonding capacity, rounded to the nearest whole dollar.
To calculate this, take the total assessed valuation and multiply that by 1.25% for non-unified school districts or 2.5% for unified school districts, rounded to two decimal places.
- c. The district's unduplicated pupil percentage as determined for purposes of the local control funding formula pursuant to Education Code Section 42238.02, rounded to two decimal places.
- d. The district's enrollment, pursuant to Section 1859.70.5(a)(3) based on the latest California Basic Educational Data System (CBEDS) enrollment data as it would have been reported using the criteria in Parts A, C and D of the Form SAB 50-01. Applications filed on or after November 1 must include the current school year enrollment.
- e. Check Yes or No to indicate whether the project includes the use of a Project Labor Agreement for this application. If the district indicates it intends to have a Project Labor Agreement, but does not yet, it will be audited for compliance and the funding will be adjusted accordingly if it does not have a Project Labor Agreement.

23. Architect of Record or Licensed Architect Certification

The architect of record or the licensed architect must complete this section.

24. Architect of Record or Design Professional Certification

The architect of record or the appropriate design professional must complete this section.

25. Certification

The district representative must complete this section. For additional information regarding district certifications, refer to the SFP handbook located on the OPSC web site at www.dgs.ca.gov/opsc.

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3. Number of Classrooms:

Master Plan Acreage Site Size (Useable): _____

Recommended Site Size (Useable): _____

Existing Acres (Useable): _____

Proposed Acres (Useable): _____

4. Type of Financial Hardship Request

- ☐ Submittal pending OPSC approval pursuant to Section 1859.81(h)
- ☐ Submittal with school board resolution, pursuant to Section 1859.95.1
(Insufficient Bond Authority)

5. New Construction Additional Grant Request—New Construction Only

- a. Therapy: Toilets (sq. ft.) _____
Other (sq. ft.) _____
- b. Multilevel Construction (CRS): _____
- c. ☐ Project Assistance
- d. Site Acquisition:
- (1) 50 percent Actual Cost: \$ _____
- (2) 50 percent Appraised Value: \$ _____
- (3) 50 percent Relocation Cost: \$ _____
- (4) 2 percent (min. \$25,000): \$ _____
- (5) 50 percent DTSC Fee: \$ _____
- e. 50 percent hazardous waste removal: \$ _____
☐ Response Action (RA)
- f. Site Development
- ☐ 50 percent Service-Site: \$ _____
- ☐ 50 percent Off-Site: \$ _____
- ☐ 50 percent Utilities: \$ _____
- ☐ General Site
- g. ☐ Energy Efficiency: _____ %
- h. ☐ Automatic Fire Detection/Alarm System
- ☐ Automatic Sprinkler System
- i. ☐ High Performance Incentive (Indicate Points): _____

6. Modernization Additional Grant Request

- a. ☐ Project Assistance
- b. ☐ Energy Efficiency: _____ %
- c. ☐ Site Development—60 percent utilities: \$ _____
- d. ☐ Site Development—75 Years or Older: \$ _____
- e. ☐ Automatic Fire Detection/Alarm System
- f. ☐ High Performance Incentive (Indicate Points): _____
- g. ☐ Minimum Essential Facility
- ☐ Multipurpose
- ☐ Gymnasium
- ☐ Library
- ☐ Kitchen
- ☐ Hybrid: _____
- Toilet (sq. ft.): _____
- Other (sq. ft.): _____
- Construction Type
- ☐ Permanent
- ☐ Portable
- ☐ Site Development pursuant to Section 1859.78.9.1
- ☐ 35 percent of supplemental grant; or,
- ☐ 60 percent of minimum work \$ _____

h. 1) Transitional Kindergarten Classroom(s)

- ☐ New Construction
Number of Classroom(s): _____
- ☐ Automatic Fire Detection/Alarm System
- ☐ Automatic Sprinkler System
- ☐ Multilevel Classrooms(s) Construction: _____
- ☐ Retrofit
Number of Classroom(s): _____
- ☐ Automatic Fire Detection/Alarm System
- ☐ 50-year-old utilities
- ☐ Site Development pursuant to Section 1859.78.9.2
- ☐ 35 percent of supplemental grant; or,
- ☐ 60 percent of minimum work \$ _____

h. 2) Enrollment Data for Site

	3rd Prev.	2nd Prev.	Previous	Current
Grade	/	/	/	/
TK				
K				
1				
2				
3				
TOTAL	0	0	0	0

7. Excessive Cost Hardship Request**New Construction Only**

- ☐ Geographic Percent Factor: _____ %
- ☐ New School Project [Section 1859.83(c)(1)]
- ☐ New School Project [Section 1859.83(c)(2)]
- ☐ Small Size Project
- ☐ Urban/Security/Impacted Site;
- If a new site, \$ _____ per Useable Acre [Section 1859.83(d)(2)(C)]

Modernization Only

- ☐ Geographic Percent Factor: _____ %
- ☐ Small Size Project
- ☐ Urban/Security/Impacted site
- ☐ Accessibility/Fire Code
- ☐ 3 percent of base grant; or,
- ☐ 60 percent of minimum work \$ _____
- ☐ Number of 2-Stop Elevators: _____
- ☐ Number of Additional Stops: _____

**8. Charter School Facilities Program Rehabilitation Additional Grant and
Excessive Cost Hardship Request****Additional Grant Request**

- a. ☐ High Performance Incentive (Indicate Points): _____

Excessive Cost Hardship Request

- b. ☐ Geographic Percent Factor: _____ %
- c. ☐ Small Size Project
- d. ☐ Urban/Security/Impacted site
- e. ☐ Accessibility/Fire Code
- ☐ 3 percent of base grant; or,
- ☐ 50 percent of minimum work \$ _____
- ☐ Number of 2-Stop Elevators: _____
- ☐ Number of Additional Stops: _____

**APPLICATION FOR FUNDING
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9. Project Priority Funding Order—New Construction Only

Priority order of this application in relation to other new construction applications submitted by the district at the same time: # _____

Project meets:

- ☐ Density requirement pursuant to Section 1859.92(c)(3).
☐ Stock plans requirement pursuant to Section 1859.92(c)(4).
☐ Energy efficiency requirement pursuant to Section 1859.92(c)(6).

10. Prior Approval Under the LPP

New Construction: 22/ _____
 Modernization: 77/ _____

11. Prior Apportionment Under the SFP

Site/Design—New Construction: 50/ _____
 Design—Modernization: 57/ _____

12. Preliminary Apportionment to Final Apportionment

Preliminary Apportionment Application Number: # _____

13. Alternative Developer Fee—New Construction Only

Alternative developer fee collected and reportable pursuant to Regulation Section 1859.77: \$ _____

14. Adjustment to New Construction Baseline Eligibility

a. Classroom(s) provided:

Additional	Replacement
K-6: _____	K-6 _____
7-8: _____	7-8 _____
9-12: _____	9-12 _____
Non-Severe: _____	Non-Severe _____
Severe: _____	Severe _____

Construction Contract(s) for the project signed on: _____

15. Pending Reorganization Election—New Construction Only ☐ Yes ☐ No**16. Joint-Use Facility/Leased Property**

- a. ☐ Joint-Use Facility
 b. ☐ Leased Property

17. Project Progress Dates

- a. Construction Contract(s) awarded on: _____
 (If the space provided is not sufficient for all applicable contract dates, please list all dates on a separate attachment to this form.)
 b. Notice(s) to Proceed issued on: _____
 c. If the Construction Contract(s) was awarded prior to January 1, 2012, have you initiated and enforced an LCP approved by the DIR pursuant to Labor Code Section 1771.7 for this project? ☐ Yes ☐ No

18. Prevailing Wage Monitoring and Enforcement Costs

If the Construction Contract(s) was awarded on January 1, 2012 through June 19, 2014, please indicate which monitoring requirement was or is being used, pursuant to Labor Code Section 1771.3 in effect on January 1, 2012 through June 19, 2014:

- ☐ DIR Public Works administration and enforcement
☐ DIR approved District LCP
☐ Collective bargaining agreement, pursuant to Labor Code Section 1771.3(b)(3) in effect on January 1, 2012 through June 19, 2014

19. Construction Delivery Method

- ☐ Design-Bid-Build
☐ Design-Build
☐ Developer Built
☐ Lease-Lease-Back
☐ Energy Performance Contract
☐ This project includes or will include piggyback contract(s) as defined in Section 1859.2
☐ Other: _____

20. Career Technical Education Funds Request

Will CTE Funds be requested for classroom(s) included in the plans and specifications for this project? ☐ Yes ☐ No
 Number of CTE classroom(s): _____

21. Overcrowding Relief Grant Narrative

22. Local Funding Adjustment Grant

- a. Total Assessed Valuation: _____
 b. District's gross bonding capacity, (rounded to the nearest whole dollar): _____
 c. District's unduplicated pupil percentage, rounded to two decimal places: _____ %
 d. District's enrollment: _____
 e. Does this project include the use of a Project Labor Agreement? ☐ Yes ☐ No

23. Architect of Record or Licensed Architect Certification

I certify as the architect of record for the project or as a licensed architect that:

- The P&S for this project were submitted to the OPSC by electronic medium (i.e., CD-ROM, zip disk or diskette) or as an alternative, if the request is for a modernization Grant, the P&S were submitted in hard copy to the OPSC.
- Any portion of the P&S requiring review and approval by the Division of the State Architect (DSA) were approved by the DSA on _____ (enter DSA approval date).
- Any portion of the P&S not requiring review and approval by the DSA meets the requirements of the California Code of Regulations, Title 24, including any access and fire code requirements.
- If the request is for a Modernization or Charter School Facilities Program Rehabilitation Grant, the P&S include the demolition of more classrooms than those to be constructed in the project, the difference is _____ classroom(s). (Indicate N/A if there are none.)
- If the request is for a Modernization or Charter School Facilities Program Rehabilitation Grant, the P&S include the construction of more classrooms than those to be demolished in the project, the difference is _____ classroom(s). (Indicate N/A if there are none.)

 ARCHITECT OF RECORD OR LICENSED ARCHITECT (PRINT NAME)

 SIGNATURE

 DATE

**APPLICATION FOR FUNDING
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24. Architect of Record or Design Professional Certification

I certify as the architect of record for the project or the appropriate design professional, that:

- If the request is for a New Construction Grant, not including the ORG, I have developed a cost estimate of the proposed project which indicates that the estimated construction cost of the work in the P&S including deferred items (if any) relating to the proposed project, is at least 60 percent of the total grant amount provided by the State and the district's matching share, less site acquisition costs and the High Performance Base Incentive Grant. This cost estimate does not include site acquisition, planning, tests, inspection, or furniture and equipment and is available at the district for review by the OPSC.
 - If the request is for a Modernization or Charter School Facilities Program Rehabilitation Grant, I have developed a cost estimate of the proposed project which indicates that the estimated construction cost of the work in the P&S, including deferred items and interim housing (if any) relating to the proposed project, is at least 60 percent of the total grant amount provided by the State and the district's matching share, less the High Performance Base Incentive Grant. This cost estimate does not include planning, tests, inspection or furniture and equipment and is available at the district for review by the OPSC.
 - If the request is for a Modernization Grant and includes replacement of a 75 Years or Older Building(s), the cost estimate must delineate the costs associated with the work for the qualifying facility(s) pursuant to Sections 1859.78.7.1. in the DSA-approved plans apart from the other Modernization work in the DSA-approved plans and indicate that the estimated construction cost of the work in the P&S, including deferred items (if any) relating to the proposed project, is at least 60 percent of that portion of the grant amount provided by the State and the district's matching share.
 - If the request is for a Modernization Grant and includes a Minimum Essential Facility or new or retrofitted Transitional Kindergarten classroom(s), the cost estimate must delineate the costs associated with the work for the qualifying facility(s) pursuant to Sections 1859.78.9.1, or 1859.78.9.2 in the DSA-approved plans apart from the other Modernization work in the DSA-approved plans and indicate that the estimated construction cost of the work in the P&S, including deferred items and interim housing (if any) relating to the proposed project, is at least 60 percent of that portion of the grant amount provided by the State and the district's matching share.
- is implemented under the provisions of Education Code Section 17070.75 and 17070.77 (refer to Sections 1859.100 through 1859.102); and,
- The district has considered the feasibility of the joint use of land and facilities with other governmental agencies in order to minimize school facility costs; and,
 - If this funding request is for the modernization of portable classrooms eligible for an additional apportionment pursuant to Education Code Section 17073.15, the district certifies that (check the applicable box below):
 - ☐ 1. The state modernization funds will be used to replace the portable classrooms and permanently remove the displaced portables from the classroom use within six months of the filing of the Notice of Completion for the project; or,
 - ☐ 2. It has provided documentation to the Office of Public School Construction which indicates that modernizing the portable classrooms eligible for an additional apportionment is better use of public resources than the replacement of these facilities.
 - Facilities to be rehabilitated under the Charter School Facilities Program previously funded with School Facility Program State funds meet the requirements of Section 1859.163.6; and,
 - All contracts entered on or after November 4, 1998 for the service of any architect structural engineer or other design professional for any work under the project have been obtained pursuant to a competitive process that is consistent with the requirements of Chapter 10 (commencing with Section 4525) of Division 5, of Title 1, of the Government Code; and,
 - If this request is for new construction funding, the district has received approval of the site and the plans from the CDE. Plan approval is not required if request is for separate design apportionment; and,
 - If this request is for modernization or Charter School Facilities Program Rehabilitation funding, the district has received approval of the plans for the project from the CDE. Plan approval is not required if request is for separate design apportionment; and,
 - The district has or will comply with the Public Contract Code regarding all laws governing the use of force account labor; and,
 - This district has or will comply with Education Code Section 17076.11 regarding at least a 3 percent expenditure goal for disabled veteran business enterprises; and,
 - The district matching funds required pursuant to Sections 1859.77.1 or 1859.79 has either been expended by the district, deposited in the County School Facility Fund or will be expended by the district prior to the notice of completion for the project; and,
 - The district has received the necessary approval of the plans and specifications from the Division of the State Architect unless the request is for a separate site and/or design apportionment; and,
 - If the district is requesting site acquisition funds as part of this application, the district has complied with Sections 1859.74 through 1859.75.1 as appropriate; and,
 - With the exception of an apportionment made pursuant to Section 1859.75.1, the district understands that the lack of substantial progress toward increasing the pupil capacity or renovation of its facilities within 18 months of receipt of any funding shall be cause for the rescission of the unexpended funds (refer to Section 1859.105); and,
 - If the apportionment for this project was made pursuant to Section 1859.75.1, the district understands that the lack of substantial progress toward increasing the pupil capacity or renovation of its facilities within 12 months of receipt of any funding shall be cause for the rescission of the unexpended funds (refer to Section 1859.105.1); and,
 - The district understands that funds not released within 18 months of apportionment shall be rescinded and the application shall be denied (refer to Section 1859.90); and,

ARCHITECT OF RECORD OR DESIGN PROFESSIONAL (PRINT NAME)

SIGNATURE

DATE

25. Certification

I certify, as the District Representative, that the information reported on this form, with the exception of items 22 and 23, is true and correct and that:

- I am an authorized representative of the district as authorized by the governing board of the district; and,
- A resolution or other appropriate documentation supporting this application under Chapter 12.5, Part 10, Division 1, commencing with Section 17070.10, et. seq., of the Education Code was adopted by the school district's governing board or the designee of the Superintendent of Public Instruction on, _____; and,
- The district has established a "Restricted Maintenance Account" for exclusive purpose of providing ongoing and major maintenance of school buildings and has developed an ongoing and major maintenance plan that complies with and

**APPLICATION FOR FUNDING
SCHOOL FACILITY PROGRAM**

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- The statements set forth in this application and supporting documents are true and correct to the best of my knowledge and belief; and,
- All school facilities purchased or newly constructed under the project for use by pupils who are individuals with exceptional needs, as defined in Education Code Section 56026, shall be designed and located on the school site so as to maximize interaction between those individuals with exceptional needs and other pupils as appropriate to the needs of both; and,
- This form is an exact duplicate (verbatim) of the form provided by the OPSC. In the event a conflict should exist, the language in the OPSC form will prevail; and,
- The district understands that some or all of the State funding for the project must be returned to the State as a result of an audit pursuant to Sections 1859.105, 1859.105.1, 1859.106; and,
- The district has complied with the provisions of Sections 1859.76 and 1859.79.2 and that the portion of the project funded by the State does not contain work specifically prohibited in those Sections; and,
- If the SFP grants will be used for the construction or modernization of school facilities on leased land, the district has entered into a lease agreement for the leased property that meets the requirements of Section 1859.22; and,
- If the application contains a "Use of New Construction Grant" request, the district has adopted a school board resolution and housing plan at a public hearing at a regularly scheduled meeting of the governing board on _____ as specified in Sections 1859.77.2, or 1859.77.3, as appropriate. The district's approved housing plan is as indicated (check all that apply):
 - ☐ 1. The district will construct or acquire facilities for housing the pupils with funding not otherwise available to the SFP as a district match within five years of project approval by the SAB and the district must identify the source of the funds. [Applicable for Sections 1859.77.2(a) and (b) and 1859.77.3(a) and (b)]
 - ☐ 2. The district will utilize higher district loading standards providing the loading standards are within the approved district's teacher contract and do not exceed 33:1 per classroom. [Applicable for Sections 1859.77.2(a) and (b) and 1859.73(a) and (b)]
 - ☐ 3. The pupils requested from a different grade level will be housed in classrooms at an existing school in the district which will have its grade level changed, to the grade level requested, at the completion of the proposed SFP project. [Applicable for Sections 1859.77.2(b) and 1859.77.3(b)].
- If the district requested additional funding for fire code requirements pursuant to Sections 1859.71.2 or 1859.78.4, the district will include the automatic fire detection/alarm system and/or automatic sprinkler system in the project prior to completion of the project; and,
- The district has consulted with the career technical advisory committee established pursuant to Education Code Section 8070 and the need for vocational and career technical facilities is being adequately met in accordance with Education Code Sections 51224, 51225.3(b), and 51228(b), and 52336.1; and,
- If the district is requesting an Additional Grant for Energy Efficiency pursuant to Sections 1859.71.3 or 1859.78.5, the increased costs for the energy efficiency components in the project exceeds the amount of funding otherwise available to the district; and,
- If this application is submitted after January 1, 2004 for modernization funding, the district has considered the potential for the presence of lead-containing materials in the modernization project and will follow all relevant federal, state, and local standards for the management of any identified lead; and,
- The district has initiated and enforced an LCP that has been approved by the DIR, pursuant to Labor Code Section 1771.7, if the project is funded from Propositions 47 or 55 and the Notice to Proceed for the construction phase of the project is issued on or after April 1, 2003 and before January 1, 2012; and,
- The district has contracted with the DIR for prevailing wage monitoring and enforcement pursuant to Labor Code Section 1771.3(a) in effect on January 1, 2012 through June 19, 2014, if the construction contract was awarded on January 1, 2012 through June 19, 2014 and the district has not obtained a waiver for the requirement, pursuant to Labor Code Section 1771.3(b) in effect on January 1, 2012 through June 19, 2014. The district understands that if it fails to meet this requirement, it will be required to repay all state bond funds received including interest; 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,
- If this application is submitted pursuant to Section 1859.180, the district certifies that within six months of occupancy of the permanent classrooms, it will remove the replaced portables from the eligible school site and K-12 grade classroom use with the exception of schools described in Education Code Section 17079.30(c); and,
- The district has considered the feasibility of using designs and materials for the new construction or modernization project that promote the efficient use of energy and water, maximum use of natural light 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 the other characteristics of high performance schools; and,
- If the district is requesting an additional grant for high performance incentive funding, the school district governing board must have a resolution on file that demonstrates support for the high performance incentive grant request and the intent to incorporate high performance features in future facilities projects; and,
- If this application is submitted when there is Insufficient Bond Authority, the district has adopted a school board resolution pursuant to Section 1859.95.1; and,
- The district will comply with all laws pertaining to the construction or modernization of its school building.
- If the district marked the box for 'Yes' in Section 22 e. of this application that it has or will include a project labor agreement, the use of a project labor agreement will be verified as part of the audit required in EC Section 41024. If it is determined that a project labor agreement was not used, the additional Local Share Adjustment Grant funding provided as a result of the points assigned to the project to determine the matching share percentage will be required to be returned, with interest (based on the interest rate earned in the Pooled Money Investment Account at the time of fund release) until funds are returned.
- If the district is requesting the modernization supplemental grant for Minimum Essential Facilities pursuant to Section 1859.78.9.1 as part of this application, the district certifies that any classrooms displaced as a result of reconfiguration are replaced in the same plan set, or the district certifies that the classrooms are not being replaced due to a demonstrated lack of need and the district acknowledges that no adjustment to the district's new construction eligibility will be made for the removal of these classrooms; and,
- If this funding request is for the retrofit of kindergarten classrooms, the School District certifies that the classrooms did not meet design requirements for a kindergarten classroom at the time they were built or previously retrofitted to meet kindergarten standards; and,

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- If funding for new or retrofitted Transitional Kindergarten classrooms is being requested, the School District certifies that _____ classrooms were constructed or previously altered to meet the requirements for a kindergarten classroom; and,
- With regards to providing Transitional Kindergarten instruction as pursuant to Section 1859.78.9.2, the School District certifies that the School District is currently or will provide Transitional Kindergarten at the project site.

• 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(b), 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.

NAME OF DISTRICT REPRESENTATIVE (PRINT)

PHONE NUMBER

SIGNATURE OF DISTRICT REPRESENTATIVE

DATE

**APPLICATION FOR CHARTER SCHOOL PRELIMINARY APPORTIONMENT
SCHOOL FACILITY PROGRAM**

SAB 50-09 (REV 10/14XX/XX)

GENERAL INSTRUCTIONS

This form is used to request a preliminary apportionment for the new construction or rehabilitation of charter school facilities. This form may be submitted by either a Charter School directly or by a school district on behalf of a Charter School, provided the school is within the geographical boundaries of the district. The apportionment will be a reservation of funds for the project to allow time to receive the necessary approvals from other State entities and shall be converted to a Final Charter School Apportionment based on Sections 1859.165 through 1859.166.1.

The applicant must assign a Project Tracking Number (PTN) to this project. The same PTN is used by the OPSC, the Division of the State Architect (DSA) and the California Department of Education (CDE) for all project applications submitted to those agencies, which assist those agencies to track a particular project through out the entire state application review process. If a PTN has already been assigned to this project by prior submittal of the plans and specifications to either the DSA or the CDE for approval, use that PTN for this application submittal. If no PTN has been previously assigned for this project, a PTN may be obtained from the Office of Public School Construction (OPSC) Web site at www.dgs.ca.gov/opsc "P.T. Number Generator." (Obtain from school district.)

Prior to submitting this form, the Board must determine or adjust the appropriate district's eligibility for new construction funding on the Form SAB 50-03. If the district has a pending reorganization election that will result in the loss of eligibility for the proposed project, the district may not file this application until the Board has adjusted the district's new construction baseline eligibility as required in Section 1859.51. This may be accomplished by completion of Form SAB 50-01, Form SAB 50-02, and Form SAB 50-03. The following documents must be submitted with this form (as appropriate):

For new construction and rehabilitation projects,

- Form SAB 50-01, Form SAB 50-02 and Form SAB 50-03 (if not previously submitted by the school district).
- Verification of the Charter School's notification to the school district of its intent to apply for State funding pursuant to Education Code Section 17078.53(b) for a charter applying on its own behalf.
- A narrative describing the proposed project. Include the estimated general scope of the project intended, estimated opening date of the school, the Charter School General Location, if the project will include new construction or rehabilitation of existing facilities, and if the facilities are of permanent or portable construction.

For new construction projects,

- If the Charter School is applying for a Preliminary Apportionment on its own behalf, a school board resolution certifying to the number of the district's unhoused pupils, pursuant to Section 1859.162.1(a) that the project will house, the supporting documentation used to generate this number and the school board meeting minutes that recorded the approval of the certification.
- For school districts applying on behalf of a Charter School, certification, signed by the district representative, and supporting documentation that states the number of the district's unhoused pupils that will be housed in the charter school project.

- An estimated recommended site size letter from the CDE.
- An Appraisal or Preliminary Appraisal of the property, or documentation supporting the Median Cost of the property, if requesting site acquisition funds. See Section 1859.163.2(a).
- Supporting documentation for relocation expenses and Department of Toxic Substances Control (DTSC) costs, if requesting amounts other than the 15 percent standard allowance. See Section 1859.163.2(b).
- A cost estimate for site development using the historical data of School Facility Program projects within the district or adjacent school districts within the General Location, if requesting amounts other than the standard allowance of \$70,000 per acre. See Section 1859.163.1(a)(3).

For purposes of determining an amount for site acquisition pursuant to Section 1859.164.2(b), the following documents must be submitted with this form (as appropriate):

- Contingent site approval letter from the CDE.
- Preliminary appraisal of property.

For rehabilitation projects,

- For a Charter School submitting a Preliminary Apportionment for rehabilitation on its own behalf, an agreement between the school district and the Charter School for use of the facilities to be rehabilitated. The agreement must have been discussed and approved at a school district board meeting.
- A drawing of the school site that identifies all classrooms and subsidiary facilities and specifies the square footage and age of each building that will be included in the project.

Requests for new construction or rehabilitation funding are available only to applicants that have current financial soundness status from the California School Finance Authority. Applicants may apply for a separate amount for the design and for the new construction site acquisition on the same project. Applicants may apply for a separate amount for the design of the project by submittal of Form SAB 50-05.

For a complete list of the application submittal guidelines, consult the OPSC Web site at www.dgs.ca.gov/opsc.

If the Charter School or district is requesting a Preliminary Apportionment after the initial baseline eligibility was approved by the Board and the district's current California Basic Education Data System (CBEDS) enrollment reporting year is later than the enrollment reporting year used to determine the district's baseline eligibility or adjusted eligibility, the district must complete a new Form SAB 50-01, based on the current year CBEDS enrollment data, and submit it to the OPSC with this form. The district must also update its eligibility by separation of Special Day Class from regular K-12 grade level pupils by submitting a revised Form SAB 50-02 and Form SAB 50-03, if it has not already done so. A Small School District with 2,500 or less enrollment as defined in Section 1859.2 will have its eligibility adjusted as provided in Section 1859.51(j).

**APPLICATION FOR CHARTER SCHOOL PRELIMINARY APPORTIONMENT
SCHOOL FACILITY PROGRAM**

SAB 50-09 (REV 10/14XX/XX)

SPECIFIC INSTRUCTIONS

A preliminary application may be submitted by either a school district on behalf of a Charter School or a Charter School on its own behalf if the Charter School has notified both the superintendent and the governing board of its intent to do so in writing at least 30 days prior to submission of the preliminary application. See Education Code Section 17078.53 (b)(1) and (2). The notice shall be submitted to the school district in writing in such a way that allows for verification of the received date. The notice shall also include a request for a school district certification pursuant to Section 1859.162.1(a), a request for an update in the district's enrollment pursuant to Section 1859.162.1(b) and must indicate to the school district the number of pupils the charter school intends to apply for. Please indicate method of filing by checking appropriate box. If the school district's eligibility is filed on a HSAA basis, the proposed project shall be constructed within the boundaries of that attendance area for which the eligibility is adjusted pursuant to Section 1859.162.2.

Prior to submitting a request for a preliminary apportionment the appropriate chartering entity must have either approved a charter petition or a material revision to a charter for the school in which the application references.

1. Type of Application

Check the appropriate box that indicates the type of request the applicant is applying for with this form. If the applicant is requesting a determination of eligible site acquisition costs from a Preliminary Charter School Apportionment previously approved by the Board, complete boxes 2, 3, 4 and the site acquisition data in 5b.

2. Type of Project

- Select the type of project that best represents this application request.
- Enter the name of the school district where the Charter School is physically located.

3. Number of Classrooms/Useable Acres

Enter the:

- Estimated number of classrooms in the proposed project.
- Existing Useable Acres (if addition to existing site).
- Estimated Proposed Useable Acres to be acquired for the project.

The estimated Proposed Useable Acres shall be obtained from CDE prior to application submittal.

4. Additional Project Information—New Construction Only

- Enter the estimated number of pupils, by grade level, that will attend the Charter School.
- Enter the number of the school district's unhoused pupils to be housed in the Charter School pursuant to Section 1859.162.1(a) or 1859.162.2(b).
- Is this request an addition to an existing site? Yes or No. If yes, enter school name.

5. Increase in Preliminary Apportionment—New Construction Only

Complete the appropriate Sections if the applicant is requesting an increase in the Preliminary Apportionment for the items listed. Refer to Sections 1859.163.1 and 1859.163.2.

- Check the box if the applicant request additional funding due to multilevel construction. See Section 1859.163.1(a)(2).
- Site Acquisition:
 - Enter 50 percent of the appraised value or the preliminary appraised value or the Median Cost of the property. See Section 1859.163.2(a). If the purchase price of the site is being determined using the median cost of the Charter School General Location enter the nearest street intersection to the charter school site.
 - To determine an allowance for relocation cost and DTSC cost, the applicant may request 15 percent of the property value determined above or specific or historic values of these costs. See Section 1859.163.2(b). If specific or historic values are reported, the applicant must submit appropriate documentation to support the amount reported.
 - Enter 50 percent of the amount allowable for hazardous material/waste removal and/or remediation for the site acquired. This amount may not exceed the limit set in Section 1859.163.2(d).
- To determine an allowance for site development, the applicant may request \$70,000 per proposed Usable Acres or a specific or historic value of the estimated costs. See Section 1859.163.1(a)(3). If specific or historic estimated costs are used, the applicant must submit appropriate cost estimate of the proposed work conforming to Section 1859.76.

In addition, check the box if the applicant is requesting General Site Development pursuant to Section 1859.163.1.

- Check the box if the proposed project is eligible for an increase due to geographic location. See Section 1859.163.1(a)(7).
- Check the box if this request is for a small size project. See Section 1859.163.1(a)(5).
- Check the box if the proposed project qualifies for an urban location allowance. See Section 1859.163.1(a)(6).

6. Additional Project Information—Rehabilitation Only

Enter the square footage of the non-toilet area and toilet area contained in the rehabilitation project.

7. Increase in Preliminary Apportionment—Rehabilitation Only

- Check the box if the proposed project is eligible for an increase due to geographic location. See Section 1859.163.5(a)(4).
- Check the box if this request is for a small size project. See Section 1859.163.5(a)(2).
- Check the box if the proposed project qualifies for an urban location allowance. See Section 1859.163.5(a)(3).
- Check the box if the rehabilitation project includes new two-stop elevator(s). Elevator(s) are allowed only if required by the DSA. Attach copy of the DSA letter that requires that the elevator(s) be included in the project for access compliance.
- Enter the number of additional stops on new DSA required elevator(s) beyond two.

**APPLICATION FOR CHARTER SCHOOL PRELIMINARY APPORTIONMENT
SCHOOL FACILITY PROGRAM**

SAB 50-09 (REV 10/14XX/XX)

8. Project Progress Dates

Complete this section:

- a. Enter the date(s) the construction contract(s) was awarded for this project(s).
If a construction contract has not been executed, enter N/A. (If the space provided is not sufficient for all applicable contract dates, please list all dates on a separate attachment to this form.)
- b. Enter the issue date for the Notice to Proceed for the construction phase of the project, or enter N/A if a Notice to Proceed has not been issued.
- c. If a construction contract was awarded prior to January 1, 2012, check the appropriate box to indicate if you have initiated and enforced a Labor Compliance Program (LCP) approved by the Department of Industrial Relations (DIR) pursuant to Labor Code Section 1771.7 for this project.

9. Prevailing Wage Monitoring and Enforcement Costs

If the construction contract(s) for this project was awarded on January 1, 2012 through June 19, 2014, check the appropriate box to indicate which of the following methods was or is being used to meet the requirement for prevailing wage monitoring and enforcement pursuant to Labor Code Section 1771.3 in effect on January 1, 2012 through June 19, 2014:

- DIR Public Works administration and enforcement
- A DIR-approved internal LCP
- A collective bargaining agreement that meets the criteria set forth in Labor Code Section 1771.3(b)(3) in effect on January 1, 2012 through June 19, 2014.

10. Priority Order

Enter the priority order of this application in relation to other applications for Preliminary Charter School Apportionment submitted on the same date by the same applicant within the same school district.

11. Charter School Information

The information requested in (d) below can be obtained from the Charter School Information Listing posted on the OPSC's Web site.

- a. Enter the Charter School enrollment currently being served by the applicant for the purpose of calculating if the Charter School is Small, Medium, or Large. See Section 1859.2.
- b. Indicate if the Charter School operates as not for profit. If yes, must comply with the definition of Non-Profit Entity in Section 1859.2.
- c. Enter the locale code of the charter school as identified in the definitions for "Rural," "Suburban," or "Urban." See Section 1859.2.
- d. To determine if the Charter School is low income, enter the percentage of pupils at the Charter School identified as being eligible for the Free/Reduced Lunch Program. See Section 1859.2 and 1859.164.1(a).
- e. If the Charter School has submitted an additional application for this project under the requirements of Section 1859.162.1, enter the application number for that project.

12. Certification

The authorized representative for the Charter School, or the school district representative on behalf of the Charter School must complete this certification section.

- Part A – The authorized representative for the Charter School, must complete this section if filing on its own behalf; or,
- Part B – The authorized school district representative must sign and date if filing on behalf of the Charter School.

ATTACHMENT A7f

STATE OF CALIFORNIA

APPLICATION FOR CHARTER SCHOOL PRELIMINARY APPORTIONMENT SCHOOL FACILITY PROGRAM

SAB 50-09 (REV 10/14XX/XX)

STATE ALLOCATION BOARD
OFFICE OF PUBLIC SCHOOL CONSTRUCTION

Page 4 of 6

The school district or Charter School named below applies to the State Allocation Board via the Office of Public School Construction for a Preliminary Charter School Apportionment under the provisions of Chapter 12.5, Part 10, Division 1, Article 12, commencing with Section 17078.50, et seq, of the Education Code and the Regulations thereto.

☐ SCHOOL DISTRICT APPLYING ON BEHALF OF CHARTER SCHOOL	☐ CHARTER SCHOOL APPLYING ON ITS BEHALF	PRELIMINARY APPLICATION NUMBER
PROPOSED PROJECT NAME		PROJECT TRACKING NUMBER
COUNTY		HIGH SCHOOL ATTENDANCE AREA (IF APPLICABLE)
SCHOOL BOARD APPROVAL DATE OF CHARTER PETITION OR MATERIAL REVISION		

1. Type of Application—Check Only One

- ☐ New Construction Preliminary Charter School Apportionment
☐ Site Acquisition Costs [Section 1859.164.2(b)]
☐ Rehabilitation Preliminary Charter School Apportionment

2. Type of Project

- a. ☐ Elementary School
☐ Middle School
☐ High School
b. Name of school district where the Charter School project will be physically located: _____

3. Number of Classrooms/Useable Acres

Number of Classrooms: _____
Existing Acres (Useable): _____
Proposed Acres (Useable): _____

4. Additional Project Information—New Construction Only

- a. Project Capacity
- | | |
|------------|-------|
| K-6 | _____ |
| 7-8 | _____ |
| 9-12 | _____ |
| Non-Severe | _____ |
| Severe | _____ |
- b. School District's Unhoused Pupils to be housed in the Charter School
- | | |
|------------|-------|
| K-6 | _____ |
| 7-8 | _____ |
| 9-12 | _____ |
| Non-Severe | _____ |
| Severe | _____ |
- c. Addition to existing site? ☐ Yes ☐ No
If yes, enter school name: _____

5. Increase in Preliminary Apportionment—New Construction Only

- a. ☐ Multilevel Construction
b. Site Acquisition:
(1) 50 percent appraised value or median cost: \$ _____
Enter the nearest street intersection to the Charter School General Location if determined by median cost: _____
(2) Relocation/DTSC Cost:
☐ 15 percent
☐ 50 percent of specific or historical cost: \$ _____
(3) Hazardous material clean-up: \$ _____
c. Site Development
☐ \$70,000 per proposed useable acre
☐ 50 percent of specific or historical cost: \$ _____
☐ General Site
d. ☐ Geographic Percent Factor: _____ %
e. ☐ Small Size Project
f. ☐ Urban Allowance

6. Additional Project Information—Rehabilitation Only

Square Footage of Project: _____
Non-Toilets Facilities (sq. ft.): _____
Toilet Facilities (sq. ft.): _____

7. Increase in Preliminary Apportionment—Rehabilitation Only

- a. ☐ Geographic Percent Factor: _____ %
b. ☐ Small Size Project
c. ☐ Urban/Security/Impacted Site
d. ☐ Number of 2-Stop Elevators: _____
e. ☐ Number of Additional Stops: _____

8. Project Progress Dates

- a. Construction Contract(s) awarded on: _____
(If the space provided is not sufficient for all applicable contract dates, please list all dates on a separate attachment to this form.)
b. Notice to Proceed issued on: _____
c. If the Construction Contract was awarded prior to January 1, 2012, have you initiated and enforced an LCP approved by the DIR pursuant to Labor Code Section 1771.7 for this project? ☐ Yes ☐ No

APPLICATION FOR CHARTER SCHOOL PRELIMINARY APPORTIONMENT SCHOOL FACILITY PROGRAM

SAB 50-09 (REV 10/14XX/XX)

9. Prevailing Wage Monitoring and Enforcement Costs:

If the Construction Contract(s) was awarded on January 1, 2012 through June 19, 2014, please indicate which method was or is being used to meet the prevailing wage monitoring requirements, pursuant to LC Section 1771.3 in effect on January 1, 2012 through June 19, 2014:

- ☐ DIR Public Works administration and enforcement
☐ DIR Approved District LCP
☐ Collective bargaining agreement, pursuant to Labor Code Section 1771.3(b)(3) in effect on January 1, 2012 through June 19, 2014

10. Priority Order

11. Charter School Information

- a. Current Charter School enrollment: _____
 b. Is Charter School not for profit? ☐ Yes ☐ No
 c. Enter locale code of charter school: _____
 d. Free/Reduced Lunch: _____ %
 e. Additional Application Number: # _____

12. Certification

I certify that the information reported on this form is true and correct and that:

- ☐ I am an authorized representative of the Charter School designated by the governing board or equivalent authority of the Charter School and have notified both the Superintendent and the governing board of the school district in writing, at least 30 days prior to the date of this application, of our intent to submit a preliminary application (complete Part A below); or,
- ☐ I am an authorized school district representative submitting this application on behalf of a Charter School pursuant to Education Code Section 17078.53 (c)(1) (complete Part B below). If this box is checked the following certifications shall apply to the school district.
- A resolution or other appropriate documentation supporting this application under Article 12, Chapter 12.5, Part 10, Division 1, Title 2, commencing with Section 17078.50, et. seq., of the Education Code was adopted by the School District's Governing Board or the governing board or other equivalent authority of the Charter School on, _____; and,
 - Prior to submitting this application the Charter School and school district have considered existing facilities in accordance with Education Code Section 17078.53(e); and,
 - For a Charter School applying for a rehabilitation Preliminary Apportionment on its own behalf, the Charter School and school district have entered into an agreement to rehabilitate school district existing facilities and the agreement has been discussed and approved at a regularly scheduled school board meeting; and,
 - For a Charter School applying for a new construction Preliminary Apportionment on its own behalf, the Charter School and school district have complied with Section 1859.162.1 pertaining to the certification of the number of un- housed students the project will house; and,
 - The applicant has or will establish a "Restricted Maintenance Account" for exclusive purpose of providing ongoing and major maintenance of school buildings and has developed an ongoing and major maintenance plan that complies with and is implemented under the provisions of Education Code Section 17070.75 and 17070.77 (Refer to Sections 1859.100 through 1859.102); and,

- The applicant has or will consider the feasibility of the joint use of land and facilities with other governmental agencies in order to minimize school facility costs; and,
- The applicant will comply with all laws pertaining to the construction of its school building; and,
- All contracts entered for the service of any architect, structural engineer or other design professional for any work under the project have been obtained pursuant to a competitive process that is consistent with the requirements of Chapter 10 (commencing with Section 4525) of Division 5, of Title 1, of the Government Code; and,
- The applicant has or will comply with the Public Contract Code regarding all laws governing the use of force account labor; and,
- This applicant has or will comply with Education Code Section 17076.11 regarding at least a 3 percent expenditure goal for disabled veteran business enterprises; and,
- The applicant understands that the lack of substantial progress toward increasing the pupil capacity of its facilities within the timelines prescribed for a Preliminary Charter School Apportionment shall be cause for rescission of the Preliminary Charter School Apportionment; and,
- The applicant acknowledges this request may be subject to the material inaccuracy penalty provisions in Section 1859.104.1; and
- All school facilities purchased or newly constructed under the project for use by pupils who are individuals with exceptional needs, as defined in Education Code Section 56026, shall be designed and located on the school site so as to maximum interaction between those individuals with exceptional needs and other pupils as appropriate to the needs of both; and,
- If the Preliminary Charter School Apportionment is requested for the construction of school facilities on leased land, the applicant has or will execute a lease agreement for the leased property that meets the requirements of Section 1859.22; and,
- The applicant understands that when the Preliminary Charter School Apportionment is converted to a Final Charter School Apportionment, the funding available for the Final Charter School Apportionment is subject to the provisions of Section 1859.167; and,
- The statements set forth in this application and supporting documents are true and correct to the best of my knowledge and belief; 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; and,
- The applicant has initiated and enforced an LCP that has been approved by the DIR, pursuant to Labor Code Section 1771.7, if the project is funded from Propositions 47 or 55 and the notice to Proceed for the construction phase of the project is issued on or after April 1, 2003, and before January 1, 2012; and,
- The applicant has contracted with the DIR for prevailing wage monitoring and enforcement, pursuant to Labor Code section 1771.3(a) in effect on January 1, 2012 through June 19, 2014, if the construction contract was awarded on January 1, 2012 through June 19, 2014 and the applicant has not obtained a waiver for the requirement, pursuant to Labor Code Section 1771.3(b) in effect on January 1, 2012 through June 19, 2014. The applicant understands that if it fails to meet this requirement, it will be required to repay all state bond funds received including interest; and,
- Beginning with the 2005/2006 fiscal year, the applicant 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.

**APPLICATION FOR CHARTER SCHOOL PRELIMINARY APPORTIONMENT
SCHOOL FACILITY PROGRAM**

• This certification must be completed for school district applicants, but may remain blank for independent charter school applicants. 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(b), 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.

Part A. Charter School Filing on its Own Behalf

NAME OF REPRESENTATIVE		TITLE
ADDRESS		
TELEPHONE	FAX NUMBER	E-MAIL
SIGNATURE OF AUTHORIZED CHARTER SCHOOL REPRESENTATIVE		DATE

Part B. School District Filing on Behalf of Charter School

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

APPLICATION FOR CAREER TECHNICAL EDUCATION FACILITIES FUNDING SCHOOL FACILITY PROGRAM

SAB 50-10 (REV 10/14 XX/XX)

GENERAL INFORMATION

This form is to be used by a school district/joint powers authority (JPA) to request a Career Technical Education Facilities Program (CTEFP) grant. Requests for funding may be made as follows:

New Construction or Modernization project pursuant to Regulation Section 1859.190. The following documents must be submitted with this form for purposes of this apportionment:

- California Department of Education's (CDE) Career Technical Education (CTE) score letter.
- A copy of the submitted CTEFP application that complies with the requirements of Education Code Section 17078.72.
- If applicable, Plan Approval letter from the CDE School Facilities Planning Division.
- If applicable, Plans and Specifications (P&S) for the project that were approved by the Division of the State Architect (DSA) and the DSA Approval letter. Submittal of plans may be on CD-ROM or "Zip Drive" readable in AutoCAD 14. The specifications may be provided on a diskette that is IBM compatible.
- Detailed cost estimate of proposed site development, if requesting site development funding.
- Detailed construction cost estimate, if requesting construction funding.
- Itemized list of equipment including cost, if requesting equipment funding.
- If requesting a loan, the applicant must attach the completed CTEFP Funding Availability Worksheet.

SPECIFIC INSTRUCTIONS

A Project Tracking Number must be assigned by the applicant for all applications submitted to the OPSC, the DSA, or the CDE. This number may be obtained from the OPSC Web site at www.dgs.ca.gov/opsc or the DSA or the CDE Web sites under "Project Tracking Number Generator." The locale must be entered for all CTE applications submitted to the OPSC. If the district is amending its High Performance Incentive (HPI) grant request, complete sections 1 and 14 only.

1. Type of Application

Check the box that indicates the type of CTEFP funding requested. Refer to Section 1859.192 for the eligibility criteria.

2. CTE Industry Sector and Pathway(s)

Enter the name of the Industry Sector and Pathway(s).

3. Reservation of Funds

Check the box "Yes" if requesting a reservation of funds pursuant to Section 1859.193(d). Otherwise, check the box "No."

4. Loan Request

Check the box "Yes" if requesting a loan pursuant to Section 1859.194. Otherwise, check the box "No".

5. Number of CTE Classrooms

Enter the number of CTE classrooms specified in the CDE CTE Application.

6. Qualifying SFP Project Application Number

If the request is for a CTEFP Project that is part of a qualifying SFP project, indicate the SFP application number or the project tracking number of the qualifying SFP project. Refer to Section 1859.193.1 for a definition of a qualifying SFP project.

7. CDE Application Overall Score

Enter the score from the CDE CTE score letter for this project. (The applicant must have received a score of at least 105 points, as determined by the CDE pursuant to Section 1859.192(c).)

8. CTE Facility Square Footage

Enter the total eligible square footage of the CTE Facility in the project.

9. Eligible Costs

- a. Enter 50 percent of the construction cost if constructing new building area, or modernizing or reconfiguring an existing building.
- b. Enter 50 percent of the equipment cost pursuant to Education Code Section 17078.72(a).
- c. If the request is for a CTEFP Project that is not a part of a qualifying SFP project, enter 50 percent of the site development costs that meet the requirements of Section 1859.193.
- d. If the CTEFP Project is part of a qualifying SFP Project, enter 50 percent of the total SFP allowance for New Construction Grants for CTE classrooms pursuant to Section 1859.193(a)(1)(C).
- e. Enter the total of a plus b plus c minus d.

**APPLICATION FOR CAREER TECHNICAL EDUCATION FACILITIES FUNDING
SCHOOL FACILITY PROGRAM**

SAB 50-10 (REV 10/14 XX/XX)

10. Cost Per Square Footage

Enter the cost per square foot by dividing the total eligible costs in Item 9 at 100 percent by the CTE facility square footage noted in Item 8.

11. Project Assistance

Check the box if the district is requesting project assistance pursuant to Section 1859.73.1. This grant is available only to a new construction or modernization CTE project that is not part of a qualifying SFP New Construction or Modernization project.

12. Project Progress Dates

Complete this section for new construction/modernization projects:

- a. Enter the date(s) the construction contract(s) was awarded for this project(s).
If a construction contract has not been executed, enter N/A. (If the space provided is not sufficient for all applicable contract dates, please list all dates on a separate attachment to this form.)
- b. Enter the issue date for the Notice to Proceed for the construction phase of the project, or enter N/A if a Notice to Proceed has not been issued.

13. Prevailing Wage Monitoring and Enforcement Costs

If the construction contract(s) for this project was awarded on January 1, 2012 through June 19, 2014, check the appropriate box to indicate which of the following methods was or is being used to meet the requirement for prevailing wage monitoring and enforcement pursuant to Labor Code Section 1771.3 in effect on January 1, 2012 through June 19, 2014:

- Department of Industrial Relations (DIR) Public Works administration and enforcement
- A DIR-approved internal LCP
- A collective bargaining agreement that meets the criteria set forth in Labor Code Section 1771.3(b)(3) in effect on January 1, 2012 through June 19, 2014.

14. Additional Grant for High Performance Incentive

Check the box if the district is requesting an Additional Grant for HPI pursuant to Subdivision (I) of Education Code Section 17078.72. If the district has received the necessary approvals of the plans and specifications from the DSA, enter the number of high performance points as prescribed in Section 1859.71.6 or Section 1859.77.4, as applicable.

15. Certification

The district representative must complete this section.

**APPLICATION FOR CAREER TECHNICAL EDUCATION FACILITIES FUNDING
SCHOOL FACILITY PROGRAM**

SAB 50-10 (REV 10/14 XX/XX)

The school district/JPA named below applies to the State Allocation Board via the Office of Public School Construction for a grant under the provisions of Article 13, Chapter 12.5, Part 10, Division 1, commencing with Section 17078.70, et seq., of the Education Code and the Regulations thereto.

SCHOOL DISTRICT/JOINT POWERS AUTHORITY		APPLICATION NUMBER
SCHOOL NAME		PROJECT TRACKING NUMBER
COUNTY	LOCALE	HIGH SCHOOL ATTENDANCE AREA (HSAA) (IF APPLICABLE)

1. Type of Application—Check Only One

- ☐ New Construction Project—construct new school buildings and/or equipment
- ☐ Modernization Project—reconfigure existing school buildings and/or equipment
Separate HPI grant request [Section 1859.107]
- ☐ Add the HPI Grant
- ☐ Remove the HPI Grant

2. CTE Industry:

Sector: _____

Pathway(s): _____

3. Reservation of Funds:☐ Yes ☐ No**4. Loan Request:**☐ Yes ☐ No**5. Number of CTE Classrooms in the CTEFP application** _____**6. Qualifying SFP Project Application Number**

Application Number: # _____

Project Tracking Number: # _____

7. CDE Application Overall Score:Minimum Score: _____ **105****8. CTE Facility Square Footage:** _____**9. Eligible Costs**

- a. 50 Percent Construction: \$ _____
- b. 50 Percent Equipment: \$ _____
- c. 50 Percent Site Development: \$ _____
- d. 50 Percent SFP Allowance (New Construction Only) \$ _____
- e. Total (a+b+c+d): \$ **0.00**

10. Cost Per Square Foot: \$ _____**11. Project Assistance**

- ☐ CTE Project Only—not part of a qualifying SFP project

12. Project Progress Dates

a. Construction Contract signed on: _____

b. Notice to Proceed issued on: _____

(If the space provided is not sufficient for all applicable contract dates, please list all dates on a separate attachment to this form.)

13. Prevailing Wage Monitoring and Enforcement Costs

If the Construction Contract(s) was awarded on January 1, 2012 through June 19, 2014, please indicate which method was or is being used to meet the prevailing wage monitoring requirements, pursuant to Labor Code Section 1771.3 in effect on January 1, 2012 through June 19, 2014:

- ☐ DIR Public Works administration and enforcement
- ☐ DIR Approved Internal LCP
- ☐ Collective bargaining agreement, pursuant to Labor Code Section 1771.3(b)(3) in effect on January 1, 2012 through June 19, 2014

14. High Performance Incentive Additional Grant Request

- ☐ HPI - If the district has received the necessary approvals of the plans and specifications from the DSA, indicate HPI points: _____

15. Certification

I certify, as the Representative for the School District or JPA, that the information reported on this form is true and correct and that: I am the authorized representative of the District or JPA as authorized by the governing board of the district or JPA; and,

- A resolution or other appropriate documentation supporting this application under Article 13, Chapter 12.5, Part 10, Division 1, commencing with Section 17078.70, et. seq., of the Education Code was adopted by the applicant's Governing board on _____; and,
- The district has established a "Restricted Maintenance Account" for the exclusive purpose of providing ongoing and major maintenance of school buildings and has developed an ongoing and major maintenance plan that complies with and is implemented under the provisions of Education Code Sections 17070.75 and 17070.77 (refer to Sections 1859.100 through 1859.102); if the applicant is a joint powers authority that is not required to establish a "Restricted Maintenance Account" under the provisions of Education Code Section 17070.75, the applicant certifies that it can maintain its facilities with a lesser annual deposit (refer to Section 1859.101); and,
- The matching funds required pursuant to Section 1859.194 has either been received and expended by the district, deposited in the County School Facility Fund or will be received and expended by the district prior to the notice of completion for the project; and,
- The participant has or will receive the necessary approval of the plans and specifications from the Division of the State Architect; and,

APPLICATION FOR CAREER TECHNICAL EDUCATION FACILITIES FUNDING SCHOOL FACILITY PROGRAM

SAB 50-10 (REV 10/14 XX/XX)

- The participant has or will receive the necessary approval of the plans and specifications from the CDE; and,
 - The participant has complied with the provisions of Section 1859.76 and that the portion of the project funded by the State does not contain work specifically prohibited in that section; and,
 - If the SFP grants will be used for a CTEFP project on school facilities on leased land, the participant has entered into a lease agreement for the leased property that meets the requirements of Section 1859.22; and,
 - The participant has complied with the CTEFP eligibility criteria as outlined in Section 1859.192; and,
 - The participant will comply with all laws pertaining to the construction of its CTE school building; and,
 - The participant understands that funds not released within 18 months of apportionment shall be rescinded and the application shall be denied (refer to Section 1859.197); and,
 - The participant understands that by reserving funds, the applicant must submit the necessary approvals and/or Plans and Specifications within one year of apportionment; otherwise the funds will be rescinded without further Board action (refer to Section 1859.197); and,
 - The participant understands that the lack of substantial progress within 18 months of receipt of any funding shall be cause for the rescission of the unexpended funds (refer to Section 1859.198); and,
 - The participant understands that some or all of the State funding for the project must be returned to the State as a result of an audit pursuant to Sections 1859.105 and 1859.106, and that the portion of the project funded by the State does not contain work specifically prohibited; and,
 - All contracts for the service of any architect structural engineer or other design professional for any work under the project have been obtained pursuant to a competitive process that is consistent with the requirements of Chapter 10 (commencing with Section 4525) of Division 5, of Title 1, of the Government Code; and,
 - The participant has or will comply with the Public Contract Code regarding all laws governing the use of force account labor; and,
 - If this request is for modernization of CTE facilities, contracts for construction were executed on or after May 20, 2006; and,
 - All equipment was purchased on or after May 20, 2006, unless the project is combined with a qualifying SFP new construction project pursuant to Section 1859.193.1; and,
 - If this request is for new construction projects, the CTE classrooms constructed were not occupied prior to May 20, 2006; and,
 - If the applicant is requesting a loan for the matching share, a CTEFP Loan Agreement will be executed pursuant to the requirements in Section 1859.194; and,
 - The district has contracted with the DIR for Prevailing Wage Monitoring and Enforcement, pursuant to Labor Code Section 1771.3(a) in effect on January 1, 2012 through June 19, 2014, if the construction contract was awarded on January 1, 2012 through June 19, 2014 and the district has not obtained a waiver for the requirement, pursuant to Labor Code Section 1771.3(b) in effect on January 1, 2012 through June 19, 2014. The district understands that if it fails to meet this requirement, it will be required to repay all state bond funds received including interest; and,
 - The applicant has or will comply with Education Code Section 17076.11 regarding at least a 3 percent expenditure goal for disabled veteran business enterprises; and,
 - Funds reserved pursuant to Subdivision (I) of Education Code Section 17078.72 shall be rescinded if, when the necessary Plans and Specifications are submitted, the district has not attained the necessary points pursuant to Section 1859.71.6 or 1859.77.4, as applicable; and,
 - The district has considered the feasibility of using designs and materials for the new construction or modernization project that promote the efficient use of energy and water, maximum use of natural light 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 the other characteristics of high performance schools; and,
 - If the district is requesting an additional grant for high performance incentive funding, the school district governing board must have a resolution on file that demonstrates support for the high performance incentive grant request and the intent to incorporate high performance features in future facilities projects; and,
 - This form is an exact duplicate (verbatim) of the form provided by the OPSC. In the event a conflict should exist, the language in the OPSC form will prevail; and,
 - The statements set forth in this application and supporting documents are true and correct to the best of my knowledge and belief.
- This certification must be completed for school district applicants, but may remain blank for Joint Powers Authority applicants. 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(b), 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.

SIGNATURE OF DISTRICT OR JPA REPRESENTATIVE		DATE
NAME OF DISTRICT OR JPA REPRESENTATIVE (PRINT)	TITLE	TELEPHONE
E-MAIL ADDRESS		

GENERAL INFORMATION

School Districts are required to use this form to initiate a request for funding (rounded to the nearest dollar) pursuant to School Facility Program (SFP) Regulation Section 1859.84 Natural Disaster Assistance Program, for consideration by the State Allocation Board (SAB). The School District must state specifically the purpose and description of the School District's request. The School District must submit all supporting documentation to the Office of Public School Construction (OPSC). Requests for consideration are processed to the SAB upon receipt by OPSC of all required documentation and upon completion of a thorough analysis by OPSC.

In order to be considered a complete application, the School District must provide all requested information within each section (if applicable). If the narrative space is insufficient, the School District must attach an additional narrative to this request.

For School Districts requesting both Interim Housing assistance following a natural disaster and other assistance following a natural disaster, separate applications must be submitted for each request per site.

SPECIFIC INSTRUCTIONS

The School District must assign a Project Tracking Number (PTN) to this project. The same PTN is used by OPSC, the Division of the State Architect (DSA) and the California Department of Education (CDE) for all project applications submitted to those agencies to track a particular project through the entire state application review process. If the School District has already assigned a PTN to this project by prior submittal of the plans and specifications to DSA and/or CDE for approval, use that PTN for this application submittal. If no PTN has been assigned for this project, a PTN may be obtained from OPSC Online site at www.dgs.ca.gov/opsc/opsonline.

1. Type of Application

- Check the appropriate box that indicates whether this application is a new or an amended Natural Disaster Assistance request.
- Check the appropriate box that indicates the type of grant the School District is requesting. If the School District meets the Financial Hardship criteria in Section 1859.81 and the School District is requesting a separate design apportionment pursuant to Section 1859.81.1, check the appropriate Design Only box.
- If the School District is requesting Interim Housing assistance, indicate the number of Portable Classrooms that are requested to be leased or purchased by grade level, as well as the number and type of all other ancillary facilities that are requested to be leased or purchased.
- If the School District is requesting Interim Housing assistance for purchased or leased portables and/or ancillary facilities, indicate whether the portables and/or ancillary facilities existed on the impacted site at the time of the application submittal, and if so, the dates the facilities were leased or purchased, placed on site, and/or removed, as applicable.
- If the School District is requesting Interim Housing assistance

for Portable Classrooms, indicate the total number of Classrooms destroyed or rendered unsafe to occupy by the natural disaster, by grade level. If the School District is requesting Interim Housing assistance for ancillary facilities, indicate the type of any ancillary facilities destroyed or rendered unsafe to occupy by the natural disaster.

2. SFP Application(s) Submitted for the Impacted Site

Check the appropriate box(es) for any SFP application(s) specific to the impacted site that have been submitted to OPSC and are currently on OPSC's Workload or Applications Received Beyond Bond Authority lists. Provide the applicable SFP application numbers.

If there are no submitted applications, leave this section blank.

3. Prior SFP Approval(s) for Impacted Site

Provide the applicable application number(s) for any SFP application(s) specific to the impacted site that received SAB approval after the date of the natural disaster. Provide the applicable application number(s) related to the impacted site for any Facility Hardship Program application(s) and New Construction or Modernization application(s) approved by the SAB since the time of the natural disaster for which the Governor declared a state of emergency.

If there were no previous applications for the impacted site approved by the SAB after the date of the natural disaster, leave this section blank.

4. Natural Disaster – State of Emergency Proclamation

The School District must check the appropriate box indicating whether the state of emergency is listed as open at the time of application submittal to OPSC.

Enter the Executive Order number and date that the state of emergency was proclaimed by the Governor, as indicated on the Governor's Office of Emergency Services Open State of Emergency Proclamations [webpage](#).

5. Financial Hardship Request

Check the appropriate box(es) if the School District is requesting Financial Hardship assistance because it is unable to meet its matching share requirement.

- If the application includes a request for Financial Hardship, the School District must comply with the requirements of Section 1859.81.
- If there is Insufficient Bond Authority for the type of application, check the second box and attach a school board resolution pursuant to Section 1859.95.1(b).

6. Local Funding Adjustment Grant

Enter the following:

- The School District's total assessed valuation, pursuant to Section 1859.70.5(a)(1). The School District must provide a

letter or report from the county auditor-controller that certifies the School District's total assessed valuation.

- b. The School District's gross bonding capacity, rounded to the nearest whole dollar. To calculate this, multiply the total assessed valuation by 1.25 percent for non-unified School Districts or 2.5 percent for unified School Districts, rounded to two decimal places.
- c. The School District's unduplicated pupil percentage as determined for purposes of the local control funding formula pursuant to Education Code Section 42238.02, rounded to two decimal places.
- d. The School District's total enrollment, pursuant to Section 1859.70.5(a)(3), meaning the districtwide enrollment reported on a Form SAB 50-01 in Part A, Part C and Part D. Applications filed on or after November 1 must include the current school year enrollment.
- e. Check Yes or No to indicate whether the project includes the use of a Project Labor Agreement for this application. If the School District indicates it intends to have a Project Labor Agreement, but does not yet, it will be audited for compliance and the funding will be adjusted accordingly if the project does not include use of a Project Labor Agreement, pursuant to Section 1859.70.5(b)(4).

7. Division of the State Architect (DSA) Plan Approval

The School District must submit any plans and specifications (P&S) for the project that were approved by DSA, and must indicate the approval date in this section. If approval has not been obtained, the School District must indicate in the applicable narrative section if the P&S have an exception for demolition, site work, and/or specific construction delivery methods, or if the School District is still in the process of obtaining DSA approval.

If this application shares P&S with one or more SFP applications, the School District must provide the following:

- a. A clear delineation of project scope that identifies all related hybrid applications and the project scope attributable to each, and
- b. A proration of project costs and an explanation of the proration methodology, and
- c. A certification that funds one for one hybrid application will be used exclusively for that hybrid application, and
- d. An acknowledgement that expenditures must be tracked and reported separately according to the cost proration, unless the expenditure is only attributable to a specific project.

8. Interim Housing Assistance Narrative

For purposes of requests for assistance to lease or purchase Portable Classroom(s) and/or ancillary facilities as a result of a natural disaster for which the Governor has declared a state of emergency, the School District must provide documentation pursuant to SFP Regulation Section 1859.84.1 demonstrating that any funding provided for Interim Housing will supplement funding from insurance or any other local, state, or federal government disaster assistance.

Additionally, the School District must include the following

information in the narrative:

1. The background and circumstances which prompted the School District's request.
2. Information relevant to the request, such as the amount requested, the anticipated duration of the lease if the School District is requesting assistance to lease facilities, and whether the request includes the design, placement, site development, and/or equipment costs associated with the leased or purchased facilities.
3. A statement explaining why the SAB should grant the School District's request based on law, regulation, or another basis.

In addition to the narrative, the School District should provide the following documentation:

1. Documentation which includes actual costs of the facilities, including but not limited to, invoices, lease agreements, or purchase agreements.
2. Documentation, such as invoices or contracts, which includes, but is not limited to, any work associated with placing the facilities on a site.
3. In lieu of actual costs, School Districts may provide bid proposals, quotes, or other documentation that supports the amount of funding requested.
4. California Department of Education (CDE) Plan Approval(s) (as applicable).
5. DSA Plan Approval(s) (as applicable).

9. Other Assistance Following a Natural Disaster Narrative

For purposes of requesting other natural disaster assistance, the School District must provide documentation pursuant to SFP Regulation Section 1859.84.2 demonstrating that any funding provided for the scope of work in the request will supplement funding from insurance or any other local, state, or federal government disaster assistance.

Additionally, the School District must include the following information in the narrative:

1. The background and circumstances which prompted the School District's request.
2. Information relevant to the request, such as the amount requested and information that demonstrates funding from insurance proceeds and other government disaster assistance is insufficient to rehabilitate or reconstruct school facilities that existed at the time of the natural disaster.
3. A statement explaining why the SAB should grant the School District's request based on law, regulation, or another basis.
4. Justification if the application seeks natural disaster assistance funding in lieu of an Approved Application pursuant to Section 1859.82.1, or
5. Justification if the project seeks any other natural disaster assistance funding in lieu of an Approved Application pursuant to SFP regulation Section 1859.70.
6. CDE Plan Approval(s) (as applicable).

7. DSA Plan Approval(s) (as applicable).

10. Certification

The School District representative must complete this section. For additional information regarding School District certifications, refer to the SFP handbook located on OPSC's web site at www.dgs.ca.gov/opsc.

ATTACHMENTS

Attach substantiating documentation as necessary to support the School District's request. All supporting documentation must be received by OPSC prior to presentation to the SAB.

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SCHOOL DISTRICT		APPLICATION NUMBER
SCHOOL NAME		PROJECT TRACKING NUMBER
COUNTY	DISTRICT REPRESENTATIVE'S E-MAIL ADDRESS	HIGH SCHOOL ATTENDANCE AREA (HSAA) OR SUPERHSAA (IF APPLICABLE)

1. Type of Application – Check Only One**a.** Is this application New or Amended?

- ☐ New
☐ Amended

b. ☐ Interim Housing

- ☐ Other assistance following a natural disaster pursuant to Section 1859.84.2 (specify) _____
☐ Design Only—Other Assistance Following a Natural Disaster

c. ☐ Interim Housing (portable classrooms):

- ☐ Leasing (number of classrooms being requested for each grade level):

K–6:
 7–8:
 9–12:
 Non-Severe:
 Severe:

- ☐ Purchasing (number of classrooms being requested for each grade level):

K–6:
 7–8:
 9–12:
 Non-Severe:
 Severe:

☐ Interim Housing (ancillary facilities):

- ☐ Leasing
☐ Restroom(s)
☐ Kitchen
☐ Administrative Space
☐ Minimum Essential Facilities (list the type): _____
☐ Other: _____

- ☐ Purchasing
☐ Restroom(s)
☐ Kitchen
☐ Administrative Space
☐ Minimum Essential Facilities (list the type): _____
☐ Other: _____

d. Do these portable classrooms exist on site at the time of application submittal? ☐ Yes ☐ No

Date(s) portable classrooms were leased/purchased (if applicable): _____
 Date(s) portable classrooms were placed on site (if applicable): _____
 Date(s) portables were removed (if applicable): _____

Do these ancillary facilities exist on site at the time of application submittal? ☐ Yes ☐ No

Date(s) portable classrooms were leased/purchased (if applicable): _____
 Date(s) ancillary facilities were placed on site (if applicable): _____
 Date(s) ancillary facilities were removed (if applicable): _____

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- e. Indicate the grade level and number of classrooms on the impacted site that are identified as destroyed or rendered unsafe to occupy below:

K-6:
7-8:
9-12:
Non-Severe:
Severe:

Indicate the type of ancillary facilities that are identified as destroyed or rendered unsafe to occupy below:

- ☐ Restroom(s)
☐ Kitchen
☐ Administrative Space
☐ Minimum Essential Facilities (list the type): _____
☐ Other: _____

2. SFP Application(s) Submitted for Impacted Site

- ☐ Facility Hardship application(s): _____
☐ New Construction application(s): _____
☐ Modernization application(s): _____
☐ Other: _____

3. Prior SFP Approval(s) for Impacted Site:

Facility Hardship Replacement (Design/Full Grant): 51/ _____
 Facility Hardship Rehabilitation (Design/Full Grant): 58/ _____
 New Construction (Design/Full Grant): 50/ _____
 Modernization (Design/Full Grant): 57/ _____

4. Natural Disaster - State of Emergency Proclamation

- a. Is there an open state of emergency at the time of application submittal? ☐ Yes ☐ No
 b. Executive order number: _____
 c. Proclamation date: _____

5. Type of Financial Hardship Request

- ☐ Submittal pending OPSC approval pursuant to Section 1859.81(h)
☐ Submittal with school board resolution, pursuant to Section 1859.95.1 (Insufficient Bond Authority)

6. Local Funding Adjustment Grant

Complete the following:

- a. Assessed valuation: _____
 b. School District's gross bonding capacity, (rounded to the nearest whole dollar): _____
 c. School District's unduplicated pupil percentage, rounded to two decimal places: _____
 d. School District's enrollment: _____
 e. Does this project include the use of a Project Labor Agreement? ☐ Yes ☐ No

7. DSA Plan Approval

Does the School District have DSA approval(s) for any portion of the P&S requiring review and approval? ☐ Yes ☐ No

If so, enter the DSA approval date(s): _____

If not, indicate in the narrative in Section 8 or 9 if the P&S have an exception for demolition, site work, and/or specific construction delivery methods, or if the School District is still in the process of obtaining DSA approval.

Does this application share plans and specifications with at least one additional SFP application? ☐ Yes ☐ No

If so, provide the following in conjunction with the narrative in Section 8 or 9:

APPLICATION FOR NATURAL DISASTER ASSISTANCE

- a. A clear delineation of project scope that identifies all related hybrid applications and the project scope attributable to each
- b. A proration of project costs and an explanation of the proration methodology, and
- c. A certification that funds for one hybrid application will be used exclusively for that hybrid application, and
- d. An acknowledgement that expenditures must be tracked and reported separately according to the cost proration, unless the expenditure is only attributable to a specific project.

8. Narrative - Interim Housing Assistance Following a Natural Disaster:

9. Narrative - Other Assistance Following a Natural Disaster:

10. Certification

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

- I am an authorized representative of the School District as authorized by the governing board of the School District; and,
- A resolution or other appropriate documentation supporting this application under Chapter 12.5, Part 10, Division 1, commencing with Section 17070.10, et. seq., of the Education Code was adopted by the School District's governing board or the designee of the Superintendent of Public Instruction on, _____; and,
- The School District has established a "Restricted Maintenance Account" for exclusive purpose of providing ongoing and major maintenance of school buildings and has developed an ongoing and major maintenance plan that complies with and is implemented under the provisions of Education Code Section 17070.75 and 17070.77 (refer to Sections 1859.100 through 1859.102); and,
- The School District has considered the feasibility of the joint use of land and facilities with other governmental agencies in order to minimize school facility costs; and,
- All contracts entered on or after November 4, 1998 for the service of any architect structural engineer or other design professional for any work under the project have been obtained pursuant to a competitive process that is consistent with the requirements of Chapter 10 (commencing with Section 4525) of Division 5, of Title 1, of the Government Code; and,
- If this request is for new construction funding, the School District has received approval of the site and the plans from the CDE. Plan approval is not required if request is for separate design apportionment; and,
- The School District has or will comply with the Public Contract Code regarding all laws governing the use of force account labor; and,
- This School District has or will comply with Education Code Section 17076.11 regarding at least a 3 percent expenditure goal for disabled veteran business enterprises; and,
- The School District matching funds required pursuant to Sections 1859.77.1 or 1859.79 have either been expended by the School District, deposited in the County School Facility Fund or will be expended by the School District prior to the notice of completion for the project; and,
- The School District has received, or will obtain, the necessary approval of the plans and specifications from the Division of the State Architect unless the request is for a separate site and/or design apportionment; and,
- If the School District is requesting site acquisition funds as part of this application, the School District has complied with Sections 1859.74 through 1859.75.1 as appropriate; and,
- With the exception of an apportionment made pursuant to Section 1859.75.1, the School District understands that the lack of substantial progress toward increasing the pupil capacity or renovation of its facilities within 18 months of receipt of any funding shall be cause for the rescission of the

unexpended funds (refer to Section 1859.105); and,

- If the apportionment for this project was made pursuant to Section 1859.75.1, the School District understands that the lack of substantial progress toward increasing the pupil capacity or renovation of its facilities within 12 months of receipt of any funding shall be cause for the rescission of the unexpended funds (refer to Section 1859.105.1); and,
- The School District understands that funds not released within 18 months of apportionment shall be rescinded and the application shall be denied (refer to Section 1859.90); and,
- The statements set forth in this application and supporting documents are true and correct to the best of my knowledge and belief; and,
- All school facilities purchased or newly constructed under the project for use by pupils who are individuals with exceptional needs, as defined in Education Code Section 56026, shall be designed and located on the school site so as to maximize interaction between those individuals with exceptional needs and other pupils as appropriate to the needs of both; and,
- This form is an exact duplicate (verbatim) of the form provided by OPSC. In the event a conflict must exist, the language in OPSC's form will prevail; and,
- The School District understands that some or all of the State funding for the project must be returned to the State as a result of an audit pursuant to Sections 1859.105, 1859.105.1, 1859.106; and,
- The School District has complied with the provisions of Sections 1859.76 and 1859.79.2 and that the portion of the project funded by the State does not contain work specifically prohibited in those Sections; and,
- If the SFP grants will be used for the construction or modernization of school facilities on leased land, the School District has entered into a lease agreement for the leased property that meets the requirements of Section 1859.22; and,
- If the School District requested additional funding for fire code requirements pursuant to Sections 1859.71.2 or 1859.78.4, the School District will include the automatic fire detection/alarm system and/or automatic sprinkler system in the project prior to completion of the project; and,
- The School District has consulted with the career technical advisory committee established pursuant to Education Code Section 8070 and the need for vocational and career technical facilities is being adequately met in accordance with Education Code Sections 51224, 51225.3(b), and 51228(b), and 52336.1; and,
- The School District has considered the potential for the presence of lead-containing materials in the modernization project and will follow all relevant federal, state, and local standards for the management of any identified lead; and,
- The School District is in compliance with current Labor Code requirements for prevailing wage monitoring and enforcement; and,

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- Beginning with the 2005/2006 fiscal year, the School 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,
- The School District has considered the feasibility of using designs and materials for the new construction or modernization project that promote the efficient use of energy and water, maximum use of natural light 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 the other characteristics of high performance schools; and,
- If this application is submitted when there is Insufficient Bond Authority, the School District has adopted a school board resolution pursuant to Section 1859.95.1; and,
- The School District will comply with all laws pertaining to the construction or modernization of its school building.
- If the School District marked the box for 'Yes' in Section 6. of this application that it has or will include a project labor agreement, the use of a project labor agreement will be verified as part of the audit required in EC Section 41024. If it is determined that a project labor agreement was not used, the funding associated with the points assigned to the project to determine the matching share percentage will be required to be returned, with interest (based on the interest rate earned in Pooled Money Investment Account at the time of fund release) from the time of fund release until funds are returned.
- The School District understands that any funding received from insurance proceeds or government disaster assistance must be reported to OPSC in an annual narrative from the date the application was submitted to OPSC until all claims for insurance proceeds and requests for government disaster assistance are closed. The School District understands that any apportionment provided shall be adjusted for funding received from insurance proceeds or government disaster assistance for the purpose or scope of work funded by the apportionment, in accordance with the following:
 - An apportionment from New Construction bond authority pursuant to either Section 1859.84.1 or Section 1859.84.2 shall be reduced by 50 percent of the insurance proceeds or government disaster assistance, or a commensurate amount adjusted for the district matching share pursuant to Section 1859.77.1.
 - An apportionment from Modernization bond authority pursuant to Section 1859.84.2 shall be reduced by 60

percent of the insurance proceeds or government disaster assistance for the purpose or scope of work funded by the apportionment, or a commensurate amount adjusted for the district matching share pursuant to Section 1859.79.

• 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(b), 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.

September 11, 2025

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

Subject: Proposition 2 Implementation: Five-Year Master Plans – Timelines for Submittal

Dear Ms. Kirk:

Thank you for the opportunity to provide feedback on the revised Proposition 2 Five-Year Master Plan proposal presented by the Office of Public School Construction (OPSC) on August 28, 2025. The Coalition for Adequate School Housing (CASH) supports the general direction reflected in the implementation proposal for this item, and we very much appreciate OPSC’s responsiveness to our prior feedback. This letter addresses the proposed timeline for submittal of the Master Plan.

As currently drafted, the proposal treats projects with phased/advanced apportionments differently than standard New Construction and Modernization projects. We think this could inadvertently create challenges for projects with separate site/design or preliminary apportionments, including Financial Hardship, Charter School Facilities Program, and Small School District Program applications.

Under the current proposal, a project may be required to submit their Master Plan before the regulations are approved by the Office of Administrative Law (OAL). For example, a district may have submitted a Financial Hardship separate design application on October 31, 2024. That district may have used internal borrowing to proceed with project design and DSA approval, submitting the adjusted grant application six months later in April 2025. Under the current proposal, this district would have been required to submit the Master Plan at that time (April 2025), well before approval of the regulations by the State Allocation Board and OAL. This wrinkle of timing could affect adjusted grant applications that are submitted any time before OAL’s approval of the regulations.

CASH recommends an adjustment to the submittal timelines. For programs that have a phased/advanced apportionment, the “Date of Application Submittal” could be tied to the *adjusted grant/final apportionment phase*, rather than to the preliminary/separate site or design phase. This would align submittal of the Master Plan for multi-phase projects with standard full grant New Construction and Modernization projects, which have the following proposed submittal timelines:

<i>Date of Application Submittal</i>	<i>When is a Master Plan required?</i>
From Oct. 31, 2024 through 12 months from OAL approval of regulations	Within 90 days of notification of application processing
More than 12 months after OAL approval of regulations	At the time of application submittal

Thank you again for 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,

A handwritten signature in black ink, appearing to read "Rebekah Kalleen". The signature is fluid and cursive, with the first name and last name clearly distinguishable.

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



Email to: OPSCCommunications@dgs.ca.gov

September 12, 2025

Rebecca Kirk
Executive Officer
Office of Public School Construction
707 3rd Street, 4th Floor
West Sacramento, CA 95605

Re: Proposition 2 Stakeholder Comments – Five-Year Master Plan Checklist and Guidelines
(Attachments A7c, A7e)

Dear Ms. Kirk,

On behalf of the undersigned organizations, we appreciate the opportunity to provide input on the Proposition 2 Implementation Process, and we thank the Office of Public School Construction for conducting a transparent and inclusive stakeholder engagement process where feedback is welcomed and suggestions are genuinely considered.

We write to comment on the August 28, 2025 meeting where Attachment A7c, the Five-Year Master Plan Checklist, and Attachment A7e, the School Facility Program Guidelines for the Five-Year School Facilities Master Plan, were presented and discussed.

As organizations committed to advancing climate resilient schools, we believe that California has a unique opportunity to ensure that state and local school facility investments are made wisely, building schools that can withstand current and future climate impacts such as extreme heat, wildfires and their smoke, flooding, and power outages—including public safety power shutoffs that increasingly impact schools. These risks are no longer hypothetical and demand thoughtful consideration by school districts to protect student safety, health, and learning. In the 2024-25 school year alone, California students lost more than [8.8 million instructional hours](#) due to school closures and disruptions from extreme weather events. These disruptions affect

student health, safety, learning, and equity. Research consistently shows that [wildfire smoke harms children's respiratory health](#), [extreme heat has disproportionate learning impacts on Black and Hispanic students](#), and [school absences from extreme weather disruptions have an outsized impact on student learning](#).

Meanwhile, the 2025 Los Angeles fires damaged more than a dozen school buildings, with 5 permanently destroyed. Rebuilding these schools will not only be incredibly costly, but will [deplete the very funds](#) being discussed in these meetings.

Our recommendations for the Five-Year Master Plan Checklist and School Facility Program Guidelines for the Five-Year School Facilities Master Plan are intended to ensure that school facilities decisions made today account for both schools' immediate needs and long-term resilience while maximizing the educational and financial return on investment for California's students and communities. Please see our suggestions below, which include additions to the Five-Year Master Plan Checklist, including long-term cost reduction measures in the School Facility Program Guidelines for the Five-Year School Facilities Master Plan, and reframing and adding to the Sustainability subsection of the "Other Considerations" chapter of the Guidelines.

Attachment A7c, the Five-Year Master Plan Checklist

We appreciate OPSC's efforts to create a tool that aligns district planning with statutory requirements and serves as a useful support to master plan development teams. The Checklist also serves as an important data collection tool for state agencies and legislators to better understand California's school facilities. Finally, the Checklist serves an important role for district staff and their consultants, prompting them to review and confirm that all statutory requirements and key considerations have been addressed before submitting their plans. This safeguard will help to prevent important elements from being overlooked.

As precedent, we note that the Checklist currently includes items not required in statute (e.g., inclusion of Career Technical Education facilities). We also note that these items may be dispersed throughout a plan, so OPSC may want to ask for page numbers next to each item, or clarify how the district should indicate page numbers if items are dispersed.

To strengthen the tool and fulfill its critical purposes, we recommend the following additions to the Five-Year Master Plan Checklist:

Section 3—Required Elements

Under the checklist at the top of page 3 of Form SAB 50-MP:

- ☐ Whether the school has any of the following facilities:
 - Central air conditioning system
 - Tree-shaded outdoor play and learning areas

- System for assessing indoor air quality in real-time

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

A note on these suggested additions:

- Central air conditioning system: Extreme heat events are projected to increase significantly in frequency and duration across California. Without a clear understanding of which schools do and do not have reliable cooling systems, the state cannot effectively prioritize resources or prevent inequities where students in under-resourced communities are disproportionately exposed to unsafe classroom temperatures. Data collection will enable evidence-based planning, ensure compliance with health and safety requirements, and help avoid costly emergency closures.
- Shaded outdoor play areas: Urban forestry and climate experts recommend that cities plant enough trees to shade 30% of every neighborhood. Yet [research shows](#) that California's school grounds only have 6.4% median tree canopy coverage in student zones, with 1.5 million low-income students attending schools with less than 5% tree canopy. When considering the effects of hot protective sports equipment, heat-absorbing blacktops, and other intensifying factors, children often face [particularly heightened heat exposures](#) at school. This addition will provide state and district leaders with valuable data to guide long-term planning.
- System for assessing indoor air quality in real-time: Wildfire smoke and regional air pollution already force schools to cancel outdoor activities or close altogether. Indoor air quality can be just as compromised if HVAC systems are not functioning properly. Real-time monitoring gives districts the ability to make evidence-based decisions, protect students with respiratory conditions, and confirm that HVAC upgrades are meeting performance standards. This addition will provide state and district leaders with valuable data to guide long-term planning.

On page 4 of Form SAB 50-MP we propose adding the following certification:

- ☐ The Master Plan includes reference to how the plan aligns with climate impact projections, including temperatures, flood and stormwater risk, and wildfire and wildfire smoke risk through 2050 or another appropriate benchmark that aligns with the useful life of district facilities.

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

- ☐ The Master Plan includes a description of community engagement efforts, such as a list of stakeholders consulted, description of public comment gathered, and schedule of community meetings.

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

☐ The Master Plan includes a stormwater management plan

The suggested additions correspond to the following regulations and guidance provisions:

FMP checklist questions	Regs changes	Guidance provisions
Whether the school has any of the following: - Central air conditioning system - Tree-shaded outdoor play and learning areas - System for assessing indoor air quality in real-time	Page 3 of Attachment A7b, Add to Section 1859.18(d)(2)(F): 9. Central air conditioning system 10. Outdoor play area 11. Indoor air quality monitoring system	Beginning with page 12 of the guidelines in Attachment A7e: District-wide Inventory,
The Master Plan includes reference to how the plan aligns with climate impact projections, including temperatures, flood and stormwater risk, and wildfire and wildfire smoke risk through 2050 or another appropriate benchmark that aligns with the useful life of district facilities.	Add to Section 1859.18(d): (10) Reference to 30-year projections for extreme heat, flood risk, and wildfire risk. (11) Description of community stakeholder process. (12) A stormwater management plan	
The Master Plan includes a description of community engagement efforts, such as a list of stakeholders consulted, description of public comment gathered, and schedule of community meetings.	[see above]	
The Master Plan includes a stormwater management plan	[see above]	

Attachment A7e, the School Facility Program Guidelines for the Five-Year School Facilities Master Plan

Chapter 3, Cost Reduction Tools

The current framing of this section emphasizes cost reductions associated only with the *first, or upfront* costs of design and construction. We strongly recommend broadening this section to account for long-term costs, including climate resilience, energy efficiency and on-site energy generation, health and indoor environmental quality, technology and systems upgrades, and replacement / useful life costs. Here are additional subsections we recommend including in this chapter to address long-term cost-reduction measures:

- **Climate Resilience:** Facilities designed to withstand extreme heat events, wildfire smoke, flooding, and power outages help districts avoid the significant costs of emergency response, building damage, and prolonged school closures. Resilient design safeguards student health and instructional time, [creates economic value](#), and reduces long-term financial risks to both districts and the state.
- **Energy Efficiency and On-site Energy Generation:** Energy is now the second-largest expenditure for California school districts. Facilities that invest in minimizing energy demand through efficiency measures such as high-performance HVAC, lighting, and building envelope strategies can reduce ongoing utility bills. On-site renewable energy generation and storage, such as solar panels and battery microgrids, can help offset high energy costs, especially during peak hours.
- **Health and Indoor Environmental Quality (IEQ):** Poor ventilation, inadequate filtration, and deferred maintenance increase illness and absenteeism among students and staff, creating both human and financial costs. Investments in healthy indoor environments and modern HVAC systems can yield long-term savings by improving attendance and learning outcomes.
- **Technology and Systems Upgrades:** Facilities designed with adaptability in mind, such as electrification readiness, EV charging infrastructure, and modern controls, avoid costly retrofits and system overhauls in future decades, especially as code upgrades and a culture shift move towards electrification.
- **Replacement / Useful Life Costs:** Selecting low-cost but short-lived systems forces districts into earlier replacement cycles, driving up lifecycle costs. Durable, high-quality systems can reduce the need for frequent replacements.

Chapter 4, Other Considerations

We appreciate OPSC's inclusion of sustainability in this chapter, but we recommend broadening and reframing this subsection as "Climate Resilience and Sustainability." Currently, the framing of sustainability in this chapter suggests it is discretionary rather than a core necessity. In reality, climate resilience is fundamental to ensuring that schools can remain safe, operational, and conducive to learning in the decades to come, and schools are already dealing with the severity of these issues. When planning for facilities that will be in use for the next 30+ years, it's critical to consider climate projections. For example, [extreme heat days](#) above 87°F are projected to rise significantly across California counties from 2025-2055, with the number of schools and

students exposed to 120 yearly extreme heat days increasing by roughly 25% by 2055 compared to 2025. At present, over 4.1 million students in 31 counties are already exposed to [high wildfire risk](#). Projections show that 25 more counties serving almost 800,000 students will see their risk increase in the decades ahead. Reframing with climate resilience and sustainability as necessities would better reflect the scope and urgency of the challenges facing California schools.

Energy costs add another layer of urgency. Energy is now the second-largest expenditure for California school districts. With electricity prices rising, districts face growing financial strain. Clean energy technologies such as solar and battery storage are not just climate solutions, but fiscal ones: they provide long-term cost savings, protect schools during outages, improve cost predictability, and allow districts to redirect scarce resources toward teaching and learning.

Here is how we suggest rewriting the Sustainability subsection of the “Other Considerations” chapter:

Climate Resilience and Sustainability

Climate resilience and sustainability are essential considerations in school facilities planning and should be thoughtfully integrated into Master Plans. Addressing these factors is critical to ensuring that schools remain safe, healthy, and operational in the face of extreme heat, wildfires and smoke, flooding, power outages, and other climate-related risks.

School districts should consult [climate and weather projections](#), including anticipated temperature increases, wildfire risk, smoke exposure, flood risk (from extreme precipitation and/or sea-level rise), and precipitation projections, when developing their Facilities Master Plans. Incorporating these projections ensures that new construction and modernization projects are designed for the realities of the coming decades, rather than the climate of the past. Aligning plans with county Local Hazard and Mitigation Plans (LHMP) and strategies, as well as state climate data, also helps districts anticipate vulnerabilities, reduce future costs, and protect educational continuity.

School districts should evaluate not only energy efficiency and the use of renewable energy, but also long-term operational and resilience benefits. This includes selecting durable, environmentally responsible materials; designing for indoor air quality; designing nature-filled and tree shaded outdoor spaces to increase climate resilience and students' environmental literacy; and considering how facilities will perform under projected climate conditions over their anticipated useful life.

For example, schools can reduce heat islands and improve outdoor learning environments by planting and maintaining trees to expand canopy cover across the campus—not just around the perimeter. Tree shaded outdoor play and learning areas help protect students from dangerous heat exposure and improve learning and health

outcomes. Districts can also adopt cool roofing systems or protective coatings for HVAC systems to extend equipment life and maintain performance during extreme weather. Shading spaces and replacing asphalt with permeable and natural surfaces (such as planting areas, decomposed granite, mulch, and engineered wood fiber) can significantly reduce schoolyard temperatures and help manage stormwater during rain events. And investing in building hardening and defensible space measures can be important for mitigating risk of wildfire damage.

Clean energy technologies such as solar and battery storage can be incorporated as cost-effective strategies to hedge against rising utility costs, provide backup power during outages, and reduce greenhouse gas emissions. These measures can yield long-term financial savings and safeguard instructional time by ensuring continuity of operations during emergencies.

By embedding climate resilience and sustainability into facilities master planning, districts can reduce long-term costs, protect student and staff health, and ensure that schools remain centers of stability and learning even as climate risks intensify.

We also suggest the addition of the following resources:

Cal OES and CDE guide: California Emergency Management for Schools: A Guide for Districts and Sites

This [guide](#), a collaboration between the California Office of Emergency Services (Cal OES) and the California Department of Education (CDE), is a tool to assist in implementing comprehensive school safety planning and provides relevant information, resources, and tools for educational administrators, faculty, and staff.

California Collaborative for Educational Excellence: School Climate Resilience Toolkit

This [toolkit](#), from California State Agency [CCEE](#), is designed to support school and district leaders to implement climate adaptation strategies, showcasing best practices from districts that have successfully addressed climate-related challenges like energy and grid resilience, extreme heat mitigation, stormwater management, and wildfire preparedness. This valuable resource provides practical tools and guidance to help schools take immediate steps toward building a more resilient and sustainable future.

NBI's Decarbonization Roadmap Guide for School Building Decision Makers

The [Decarbonization Roadmap Guide](#) outlines achievable goals that result in healthy, affordable, all-electric facilities, and explains common actions taken by leading districts to operationalize their carbon neutral ambitions. In addition, the guide links to resources and templates that can be customized locally.

Schoolyard Forests and National Outdoor Learning Libraries

The [Schoolyard Forests Resource Library](#) and the [National Outdoor Learning Resource Library](#) include extensive interdisciplinary content to help PreK-12 educational institutions design, use,

manage, and invest in living schoolyards and schoolyard forests to improve students' health and learning while increasing climate resilience.

We thank you for your openness and willingness to collaborate throughout this process. We respectfully ask that OPSC consider our suggestions to ensure that Proposition 2 implementation fully addresses the realities of climate change, extreme weather, and rising energy costs. Doing so will help California build and modernize schools that are safe, healthy, resilient, and cost-effective for decades to come.

We appreciate your leadership and the opportunity to contribute, and we look forward to continued collaboration.

Sincerely,

Jonathan Klein
CEO and Co-founder
UndauntedK12

Andra Yeghoian
Chief Innovation Officer
Ten Strands

Sara Hinkley
California Program Manager
Center for Cities + Schools

Healthier Ippolito
President
California State PTA

Mitch Steiger
Legislative Representative
CFT

Alejandra Chiesa
VP and California State Director
Green Schoolyards America

Reilly Loveland
Associate Director
New Buildings Institute

Manny Gonez
Director of Policy Initiatives
TreePeople

Mackenzie Wieser
CEO
Sacramento Splash

Alexa Norstad
Executive Director
Center for Ecoliteracy

Cc:
Michael Watanabe, Deputy Executive Officer
Brian LaPask, Chief of Program Services

September 12, 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 #15

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 School Facility Program in response to Proposition 2.

The comments and recommendations provided below correspond to the topics raised and materials provided for the August 28, 2025, Implementation Stakeholder Meeting #15.

Five-Year School Facilities Master Plan

Proposed 2 CCR Section 1859.18(d)(2)(A) and 1859.18(d)(2)(B) – OPSC proposes that the school facilities inventory must include “the square footage of each building that is currently used for instructional purposes.” Los Angeles Unified requests clarification on what use is considered to be “instructional purposes.” For example, will the buildings need to contain classrooms or would buildings such as libraries, food services, or MPRs be considered “instructional purposes?”

Proposed 2 CCR Section 1859.18.1(f)(1) – OPSC proposes language that states “A complete Master Plan must be submitted with the 100 percent Form SAB 50-06.” Los Angeles Unified proposes “100 percent Form SAB 50-06” be replaced with “Final Expenditure Report Form SAB 50-06.”

Global School Facility Program Regulation Amendments

Section 1859.2 Definitions and Selection 1859.60 Calculation to Determine Modernization Baseline Eligibility – On page 87, OPSC clarifies and discusses what is meant by “latest CBEDS report and “enrollment reporting year,” noting that Forms SAB 50-03 and SAB 50-01 submitted before November 1st with current-year enrollment are not acceptable because the data has not been verified by CDE. However, selecting November 1st as the first acceptable date for using current school year data will not necessarily mean that the data has been “verified” by CDE.

According to CDE’s Data Reporting Office, “verified” enrollment data for the school year is not released until the summer following the school year (e.g., enrollment data for school year 2024-2025 was not released until Summer 2025). For this reason, Los Angeles Unified believes OPSC’s current interpretation that enrollment data for the current year will have been verified by CDE by November 1st, is incorrect. By extension, using November 1st as the starting date for current year enrollment usage may produce inaccurate data. Los Angeles Unified suggests OPSC coordinate with CDE to conduct further research into whether November 1st is an appropriate verified date for current school year data.

Proposed Form SAB 50-04 Section 10 – OPSC proposes an addition to the Form SAB 50-04 that prompts the form filler to indicate whether the application is a “Hybrid Application Under the SFP.” Los Angeles Unified suggests the expansion of this section to include two additional prompts:

Have other application(s) requesting additional types of SFP funding already been submitted?

☐ YES ☐ NO

If yes, provide the Application Number(s) of the related application(s): _____

The inclusion of these additional prompts will signal to OPSC which previous applications should be taken into consideration when processing a funding application, or will notify OPSC that a district intends to submit additional applications in the future.

Proposed Form SAB 50-10 Section 2 – Los Angeles Unified suggests the additional prompts listed above regarding hybrid applications, also be included in the proposed Form SAB 50-10.

Sincerely,



Sasha Horwitz
Legislative Advocate
Los Angeles Unified School District



September 12, 2025

Communications Team
Office of Public School Construction (OPSC)
707 Third Street
West Sacramento, CA 95605

**RE: FEEDBACK ON TOPICS PRESENTED DURING THE AUGUST 28, 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 fifteenth Proposition 2 Stakeholder meeting held on August 28, 2025. Below is a summary of our comments and concerns:

Five-Year School Facilities Master Plan

- We appreciate the flexibility given with the 5-year facilities master plan (FMP) requirement, in that school districts would not need to submit a FMP every year, but rather could certify that there are no 'material changes' to the FMP as long as the submittal is within the current 5-year FMP timeline.
- We also appreciate the guidelines and technical assistance that will be available to school districts, especially the small districts or those with fewer resources.

Proposed Regulatory Amendments for General Updates to the School Facility Program

- We concur with OPSC's proposed updates regarding special education data enrollment reporting on the *Enrollment Certification/ Projection* (Form SAB 50-01) to align with current practice and eliminate outdated references to previous enrollment reporting systems and timelines.
- Regarding the proposed changes to the SFP regulations (*Section 1859.2 Definitions and Section 1859.60 Calculation*) to *Determine Modernization Baseline Eligibility*, we urge OPSC to reconsider the allowance of a district to use *any enrollment data after Census Day* of any given year to report enrollment for modernization eligibility purposes. The requirement for enrollment for modernization eligibility updates to not be recognized until November 1st of a given enrollment year may result in a district being disadvantaged.

The CALPADS Census Day (or 'count' day) is the first Wednesday of October, meaning it could be October 1-7. This means that by the time that November 1st comes, there have already been 3 to 4 weeks of missed opportunity for a district to submit their current eligibility and/or a funding application using that eligibility. Specifically, as we saw in October of 2024, those 3-4 weeks made the difference between being on the *Workload* list or going back onto an *Applications Received Beyond Bond Authority* list. We do not believe that aligning the new construction and modernization eligibility submittal date requirements in regulation should be the priority when it could penalize a district in this way. Also, the stakeholder item noted that for enrollment prior to November 1st, "CDE has not yet verified that data", however the data is not CDE-verified until months later, with the certification deadline in mid-December; this rationale for when to allow enrollment to be recognized appears to be incorrect. We propose that for the period between Census Day and October 31, districts should be allowed to use the prior year OR the current year's enrollment for modernization eligibility purposes.

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,

A handwritten signature in black ink, appearing to read 'Jessica Love', with a stylized, cursive script.

Jessica Love
Hancock Park & DeLong

From: Ulysses Ramirez <uramirez@ruhnaucclarke.com>
Sent: Thursday, September 25, 2025 1:04:11 PM
To: DGS OPSC-Communications <OPSCCommunications@dgs.ca.gov>
Subject: August 28, 2025 Form 50-MP OPSC Stakeholder Meeting feedback

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.

To Whom it may Concern,

My name is Ulysses Ramirez and I am reaching out on behalf of Ruhnau Clarke Architects. I wanted to start by thanking you for your time and consideration in inviting stakeholder feedback for the implementation of the updated school facilities program regulations set forth by the passing of proposition 2.

I have a few questions and suggestions to help clarify the intent of a requirement listed in the proposed Form 50-MP checklist.

Section 3 ,page ¾ relative to form pages, has a check box for a requirement stating the FMP must include "*The pupil capacity of the school listed by **grade** level including Special Day Class, Non-severe and Severe pupils.*"

Although I understand the need to establish existing classroom capacity to satisfy statutory requirements, listing pupil capacity, specifically by grade level, may be a bit too confusing and over prescriptive for meeting this requirement. For example, middle school and high school teachers regularly teach students from different grades throughout the day, and sometimes in the same period. Trying to answer how district's should gather this data raises the question if capacity should be prorated based on the amount of periods taught per grade according to the master schedule or if Districts should simply allocate 1/4 of their general education pupil capacity to each grade. At elementary schools, the pupil capacity for a 1st grade classroom and a 5th grade classroom are exactly the same which begs the question if it's truly necessary that Districts provide pupil capacity by grade.

As a potential revision to this portion of section 3's required elements (in effort to avoid future confusion), I'd like to ask that your team considers accepting pupil capacities grouped according to the SFP loading ratio used for calculating grant amounts & ed code requirements. I've listed the suggested group below.

(Ed Code) Transitional Kindergarten: 20:1 for each compliant early ed classroom dedicated to Transitional Kindergarten, assuming compliant adult staff ratio of 20:2
(SFP)Kindergarten: 25:1 for each compliant early ed classroom dedicated to Kindergarten
(SFP)1st - 6th Grade: 25:1 for each compliant general education classroom
(SFP) 7th - 12th Grade: 27:1 for each compliant general education classroom
(Ed Code) Special Day Class Non-Severe: 12:1 compliant special day class
(Ed Code) Special Day Class Severe: 10 pupils per classroom

Thank you again for your time or consideration in listening to our feedback. Please feel free to reach out if you have any questions.



Ulysses Ramirez

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