

Charter School Facilities Program - Preliminary Apportionment Application Submittal Requirements

February 2022

The following items are necessary for a Charter School Facilities Program application package to be deemed complete by OPSC and the California School Finance Authority (CSFA):

All Application Types:

- Completed *Application for Charter School Preliminary Apportionment* (Form SAB 50-09)
This will require a resolution or other appropriate documentation from the applicant's governing board, supporting the submittal of the application.
- Narrative description of the proposed project that includes at minimum the following information:
 - Number of classrooms
 - Grade level served in each classroom
 - Intended opening date
 - If the project will be permanent or portable construction
 - The Charter School General Location (exact address of where the project will be located or cross streets to form a 3-mile radius that the project will be located within)
- California Department of Education Preliminary Recommended Site Size letter
- One copy of the most recently approved or renewed charter petition
- Minutes from board meeting held by chartering entity approving most recent charter petition
- Verification of non-profit status, if applicable.
 - IRS 501(c)(3) determination letter
 - Articles of Incorporation showing the entity is organized as/operated by a nonprofit public benefit corporation.
- Evidence that charter school delivered notification of intent to apply to the school

district at least 30 days prior to the submission of the Form SAB 50-09 to OPSC. Notify the district(s) where the project will be physically located and that serves the same grade level that will be housed in the charter project (for charter schools applying independently only)

CSFA - Financial Soundness Documents (**Submit directly to CSFA. Do not submit copies to OPSC**)

- *Financial Soundness Application* (Form CSFA 03-01)
- All supporting financial documentation (e.g., organization and financial information, all material contracts, and legal status questionnaire)
- One copy of the most recently approved or renewed charter petition

Rehabilitation Applications:

- Signed agreement between the charter school and the school district for use of the use of the facilities to be rehabilitated (for charter schools applying independently only)
- Drawing with dimensions of all proposed buildings including interior dimensioning and labeling of facilities to be rehabilitated. Drawings must highlight toilet area and classrooms
- Square footage spreadsheet listing all facilities and their total square footage amount. Facilities should be broken out into non-toilet facilities and toilet facilities. The totals for each category should match the request on the Form SAB 50-09.

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- Documentation, such as Division of the State Architect approvals, purchase orders, etc., verifying the age of the facilities to be rehabilitated

New Construction Applications:

- Appraisal or Preliminary Appraisal of the property to be acquired with a valuation date within six months of the application submittal date; or Median Cost valuation, consisting of county recorder documentation of consummated sales transactions, within the Charter School General Location; or title insurance company escrow instruction(s) for a minimum of 6 months and a maximum of 2 years from the application submittal date, which indicate the agreed upon purchase price of the property(s) for pending real-estate sales. Submit with the consummated sales transactions and pending escrow instruction data a spreadsheet summary of the data in a price per acre format
- A cost estimate for site development, which reflects 100 percent of the proposed work, outlined in SFP Regulation Section 1859.76, and approved site development and off-site plans, when requesting more than \$70,000 per proposed useable acres. Refer to SFP Regulation Section 1859.145

New construction applications will initially be accepted without the following documentation; however, it will be required once available from the school district.

- Completed form SAB 50-01 to update the district's new construction eligibility (if a district has not established new construction eligibility, it will need to submit Forms SAB 50-01, SAB 50-02, and SAB 50-03 to do so.)
- Copy of the school district governing board's resolution certifying to the number of the district unhoused students that the charter

school project will house (For charter schools applying independently only)

- Copy of the school board meeting minutes that describe the discussion and approval of the certification resolution (For charter schools applying independently only)
- Documentation that describes the method used to determine the number of the school districts unhoused students that would be included in the proposed charter school project (For charter schools applying independently only)