REPORT OF THE EXECUTIVE OFFICER
State Allocation Board Meeting, January 28, 2026

PROPOSED EMERGENCY REGULATORY AMENDMENTS FOR THE FIVE-YEAR SCHOOL FACILITIES MASTER PLAN

PURPOSE OF REPORT

To present the State Allocation Board (Board) with recommendations for the adoption of School Facility Program (SFP) regulatory amendments, on an emergency basis, for 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. These proposed amendments are related to the implementation of the Five-Year School Facilities Master Plan (Master Plan).

AUTHORITY

See Attachment A

DESCRIPTION

To implement Proposition 2 provisions, the Office of Public School Construction (OPSC) conducted multiple stakeholder meetings to discuss and receive feedback on proposed regulatory amendments resulting from statutory additions and amendments to Education Code (EC). At several meetings, OPSC proposed concepts and regulations for the Five-Year School Facilities Master Plan. The California Department of Education (CDE) and Division of the State Architect (DSA) also collaborated with OPSC during this process.

Stakeholder engagement and feedback was robust and OPSC was able to respond to the feedback in the stakeholder meetings. The proposed regulations reflect the outcome of those collaborative meetings. Based on feedback received, OPSC determined that the proposed regulatory amendments for this topic, are able to move forward for Board consideration after some minor adjustments to the version presented in the most recent stakeholder meeting, which are summarized in the Staff Analysis/Statements component of this item.

In this item, staff recommends that the Board adopt the proposed regulatory amendments to the SFP Regulations to implement and align with new statutory requirements pursuant to the provisions of Proposition 2. Staff also recommends that the Board adopt the proposed *Five-Year Master Plan Checklist* (Form SAB 50-MP), and proposed amendments 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 *Application for Natural Disaster Assistance* (Form SAB 195) to align with the proposed regulatory amendments.

DESCRIPTION (cont.)

In conjunction with this item, OPSC is presenting the *School Facility Program Guidelines for the Five-Year School Facilities Master Plan* (Guidelines) for the Board's acknowledgement.

BACKGROUND

The passage of Proposition 2 made numerous changes to the SFP that are applicable to applications received on or after October 31, 2024. This item includes the sixth set of proposed regulatory amendments for the Board's consideration to implement Proposition 2 provisions for applications received on or after October 31, 2024. Additional proposed amendments will be presented at future Board meetings.

Below is an overview of the relevant Proposition 2 statute.

Five-Year School Facilities Master Plan
EC Section 17070.54 was added to statute and is summarized as follows: Proposition 2 requires that, as a condition of participating in the SFP, school districts must submit to OPSC 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. Pursuant to EC Section 17070.15(q), "school district" in this context and throughout this Board item means a school district or a county office of education.

Proposition 2 requires:

- School districts to 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 to develop guidelines, in consultation with CDE, that school districts may use to guide the development of the school facilities master plan.
- OPSC to 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) to 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 to 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.

STAFF ANALYSIS/DISCUSSION

Policies for the Initial Implementation of Proposition 2
At the December 3, 2024, Board meeting, OPSC proposed policies for the most critical and time sensitive components of Proposition 2, including the Master Plan

STAFF ANALYSIS/DISCUSSION (cont.)

requirement. The policy item provided initial guidance for applications submitted on or after October 31, 2024, and would be followed by a series of stakeholder meetings to inform and develop regulatory changes.

Stakeholder Meetings
Stakeholder meetings were conducted on February 13, April 10, August 28 and November 6, 2025. At the initial February meeting, 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 more developed 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.* The August meeting was the first time OPSC presented proposed regulations, along with the Form SAB 50-MP checklist and a guidelines document, both designed to be resources for school districts. At the November meeting, OPSC proposed its final updates to the proposed regulations and new certifications for the Form SAB 50-04, Form SAB 50-09, Form SAB 50-10, and Form SAB 195. OPSC also added clarifying language to the certifications proposed for the Form SAB 50-09 and the Form SAB 50-10.

Stakeholder Feedback
Staff appreciates those who attended and those who raised questions or provided feedback. Feedback that was received for each respective stakeholder meeting may be found on Attachment F, alongside the items as previously presented. The table below provides summaries and responses to the feedback OPSC received after the last stakeholder meeting held on November 6, 2025. Collectively, staff's recommendations presented in this item were informed by stakeholder feedback and represent staff's final recommendations for implementation of the five-year facilities master plan provisions in Proposition 2.

Stakeholder Feedback	OPSC Response
1. The stakeholder notes that while third-party climate resilience and sustainability resources are provided in the voluntary Guidelines, they are missing recommended clarifications and are not in the regulatory requirements or the Five-Year Master Plan Checklist (Form SAB 50-MP). The stakeholder suggests that facility condition reporting, climate-responsive operational planning, and basic indoor and outdoor environment indicators should be incorporated into the proposed regulations and the Form SAB 50-MP checklist. The stakeholder	**1.** OPSC acknowledges and appreciates the stakeholder's feedback. OPSC maintains its intended approach to implementing the Master Plan requirements to closely align the proposed regulations with the statute. OPSC acknowledges the importance of climate resilience and sustainability and notes that although OPSC has not proposed to require the elements the stakeholder recommends as additional regulatory requirements, districts are encouraged to include these elements in their facilities planning. Appendix 4 of the

STAFF ANALYSIS/DISCUSSION (cont.)

Stakeholder Feedback	OPSC Response
1. (cont.) believes these recommendations are minimal elements necessary to ensure that Master Plans fulfill the statutory intent of EC Section 17070.54, which is to produce facility inventories and planning documents sufficient to inform safe, equitable, long-term capital decision-making. The stakeholder reiterates a previous request to require three inventory fields in the Form SAB 50-MP for school districts to report whether facilities have a central cooling system, shaded outdoor play/learning area, and real-time indoor air quality monitoring.	**1.(cont.)** Guidelines provides third-party resources for school districts interested in exploring sustainability planning. Future revisions of the Guidelines may also expand upon climate considerations and additional factors that school districts may wish to incorporate in the Master Plans.
2. The stakeholder proposes the following revisions to the proposed Form SAB 50-MP: *Section 3 Required Elements:* Under the second checkbox, the form states, in part, "The Master Plan includes an inventory of existing school facilities for each active/closed school site…" However, OPSC's response to a prior stakeholder comment states that the inclusion of closed school sites is recommended but not required. The stakeholder recommends the form reflect only what is required by regulations or include language about required versus recommended information. Under the eighth checkbox, the form states, in part, "The Master Plan includes projected enrollment change for the School District over the next five years, accounting for growth." However, OPSC's response to a prior stakeholder comment states that "growth" should be "changes," consistent with language in proposed SFP Regulation Section 1859.18(d)(4).	**2.** OPSC acknowledges and appreciates the stakeholder's feedback. OPSC accepts the stakeholder's comments and has updated Section 3 Required Elements of the Form SAB 50-MP to align with the proposed regulatory language in SFP Regulation Sections 1859.18(d)(2) and 1859.18(d)(4). As a reminder, at minimum, school districts must include all active sites in the inventory. However, OPSC recommends including inactive and closed sites, as stated in the Guidelines. Regarding the local auditor's role required by statute, OPSC will work with the State Controller's Office to develop specific instructions for inclusion in the audit guide for the local auditor to verify that the Master Plan requirement was fulfilled, pursuant to the requirements of EC Section 17070.54(e). Regarding the question about a penalty, OPSC advises the stakeholder that the proposed regulations state that the apportionment may be rescinded if the school district does not submit a complete and valid Master Plan in Section

STAFF ANALYSIS/DISCUSSION (cont.)

Stakeholder Feedback	OPSC Response
2. (cont.) *Section 4 Certifications and Acknowledgements:* Under the third checkbox, the form states "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 stakeholder requests additional information on what OPSC envisions as the auditor's role in validating the Master Plan. Additionally, the stakeholder requests clarification on whether the statement authorizes a penalty for any oversight in the preparation of the Master Plan, and if so, requests the statutory reference that authorizes the penalty.	**2. (cont.)** 1859.18.1, as it is a statutory condition of participation in the SFP that is subject to audit verification, pursuant to EC Sections 17070.54(a) and 17070.54(e).
3. In the proposed *School Facility Program Guidelines for the Five-Year School Facilities Master Plan,* in the "Submittal Guidelines" section, under the "Master Plan as an External Link" heading, the final sentence states, in part, "Please note that the site plan/map shall be downloadable…" The stakeholder believes the reference to "site plan/map" should be "master plan" and suggests this be revised.	**3.** OPSC agrees with the stakeholder's suggested change and has updated the Guidelines to reflect that the Master Plan and any other documents provided as a URL link, shall be downloadable as a PDF document.

Proposed SFP Regulations

OPSC proposes two new definitions to be added to the SFP Regulations, two new sections to be added to the SFP Regulations, and a new required form to guide School Districts in the preparation and submittal of a complete Master Plan. The first new Section 1859.18 specifies how often a Master Plan must be submitted or updated and lists the required components of a complete Master Plan in accordance with the minimum requirements listed in EC Section 17070.54. The second new Section 1859.18.1 defines when a Master Plan must be submitted depending on the program for which the School District has submitted an application for funding. A summary of each section follows.

Attachment B contains the updated proposed SFP emergency regulatory amendments.

STAFF ANALYSIS/DISCUSSION (cont.)

SFP Regulation Section 1859.2 – Definitions
The new term, "Form SAB 50-MP" means the *Five Year School Facilities Master Plan Checklist* (Form SAB 50-MP), which is proposed to be incorporated by reference.

The new term "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.

SFP Regulation Section 1859.18 – Five-Year School Facilities Master Plan
This proposed new section provides the requirements for a complete and valid Master Plan. It is inserted into the SFP Regulations under Article 3, SFP Application Procedure, as submittal of the Master Plan is a condition of participation in the SFP for applications submitted on or after October 31, 2024.

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

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

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

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

STAFF ANALYSIS/DISCUSSION (cont.)

Master Plan or an updated five-year school facilities Master Plan.

Subsection (d) lists the required components of a complete Master Plan and adds clarifying details where necessary to ensure consistent compliance with the statutory components. The format of the Master Plan components would be accepted in narrative, charts, graphs and/or tables as appropriate for the information type.

Modifications Since the Last Stakeholder Meeting
Since the most recent stakeholder meeting, staff added the term “active” to subdivision (d)(2) to specify that School Districts must, at minimum, include active school facilities, sites, and property for each school in the School District.

SFP Regulation Section 1859.18.1 Master Plan Submittal Time Frames
This new section establishes the required time frames for School Districts to submit a complete Master Plan. EC Section 17070.54 became operative on November 6, 2024, following voter approval of Proposition 2, and as outlined in statute the Master Plan requirement applies only to applications submitted to OPSC on and after October 31, 2024. However, in recognition of the time needed to develop these program regulations, the State Allocation Board (Board) adopted a framework of submittal dates for completed Master Plans on December 3, 2024, along with a process for submittal of governing board resolutions acknowledging the Master Plan requirement. Those Board actions have applied to applications submitted to OPSC on or after October 31, 2024, and prior to the effective date of the proposed regulations, to facilitate OPSC’s ability to continuously accept and process applications concurrent with regulatory development to implement Proposition 2.

This proposed new Regulation Section 1859.18.1 implements the Board’s previously adopted policies and expands on programs and application types that were not yet contemplated in the December 2024 Board actions, such as design and site applications.

Introductory text specifies when the required Master Plan or local governing resolution must be submitted according to the timeframes described in subsections (a) through (e) by program and application type. Failure to submit the required documents shall result in return of the funding application or may result in the rescission of the Apportionment.

For ease of reference, OPSC has included 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. In some cases, the timeline depends on when the regulations have been approved by the Office of Administrative Law (OAL) and are effective. These tables are also featured in Chapter 1 of the Guidelines.

STAFF ANALYSIS/DISCUSSION (cont.)

New Construction and Modernization Applications (Full Grant) (including projects already Board-approved for Separate Design/Site)		
Date of Application Submittal	When is a local governing 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 on October 31, 2024 and through 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 local governing 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 on October 31, 2024 and through 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 local governing 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 *Expenditure Report* (Form SAB 50-06) if it is submitted less than 18 months following fund release
*Applications submitted on October 31, 2024 and through 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 local governing 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 local governing 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.		

Natural Disaster Assistance Applications		
Date of Application Submittal	When is a local governing 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
*Applications previously processed submitted a local governing board resolution prior to being presented to the Board for approval.		

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 was created to assist School Districts and OPSC in verifying that all required components are included in the submitted Master Plan and that they contain all required and relevant information. The form contains four sections with 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 website link with Uniform Resource Locators (URL). There are fields to enter page numbers if the School District submits documents in PDF, or URL information if the Master Plan is web-based.

OPSC proposes that School Districts be required to 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 and will effectively work as a version of the Form SAB 50-MP checklist embedded in the OPSC Online user interface.

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

Since the most recent stakeholder meeting, staff have made non-substantive, clarifying language amendments in response to stakeholder comments to align with the proposed regulations.

Proposed Certifications on Regulatory Forms
OPSC proposes to add a new certification to the Form SAB 50-04, Form SAB 50-09, and the Form SAB 50-10. The new certification is on each Form reflected as part of Attachment D.

This certification by the Superintendent or Authorized District Representative provides flexibility to School Districts in indicating whether the Master Plan has been approved and already filed with OPSC, whether there are material changes to a formerly submitted 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 type of application.

The certifications on the Form SAB 50-09 and the Form SAB 50-10 also specify that they are only applicable to School District applicants to the CSFP and CTEFP, respectively.

STAFF ANALYSIS/DISCUSSION (cont.)

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

In consultation with CDE, DSA, and aided by stakeholder input, OPSC created Guidelines to offer recommendations and best practices to assist 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 Guidelines are presented as part of today's Board meeting in acknowledgement that OPSC has fulfilled the statutory requirement of EC Section 17070.54(d) to develop guidelines that school districts may use to guide the development of the Master Plan required as a condition of participating in the SFP. OPSC notes that the Guidelines may be revised and expanded over time as a reference for school districts in developing and updating their Master Plans.

RECOMMENDATIONS

1. Adopt the proposed amendments to the SFP Regulations as shown on Attachment B.

2. Adopt the proposed *Five-Year Master Plan Checklist* (Form SAB 50-MP) as shown on Attachment C.

3. Adopt the proposed amendments 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 *Application for Natural Disaster Assistance* (Form SAB 195), as shown on Attachment D.

4. Authorize the Executive Officer to file the proposed regulatory amendments with the Office of Administrative Law on an emergency basis and make the regulations permanent.

This Item was approved by the State Allocation Board on January 28, 2026.

AUTHORITY

Education Code (EC) Section 17070.54 – General Provisions

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

AUTHORITY (cont.)

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

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

EC Citations Referenced in Section 17070.74

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

EC Section 14502.1 – Financial and Compliance Audits

EC Section 14502.1.

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

EC Section 17070.75 – Routine Restricted Maintenance Requirements

EC Section 17070.75.

AUTHORITY (cont.)

EC Section 17071.10 - Existing School Building Capacity

EC Section 17071.10.

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

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

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

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

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

EC Section 17071.25 - Existing School Building Capacity

EC Section 17071.25.

EC Section 17071.75 New Construction Eligibility Determination

EC Section 17071.75.

(a)…

…

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

EC Section 17071.76 – High School Attendance Area

EC Section 17071.76.

EC Section 41024 – Accounting Regulations, Budget Controls and Audits

EC Section 41024.

EC Section 52060 – Local Control and Accountability Plans

EC Section 52060.

PROPOSED REGULATIONS

Section 1859.2 Definitions

….

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

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

….

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, active 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.

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.

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 application for funding 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 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.

STATE OF CALIFORNIA
FIVE-YEAR MASTER PLAN CHECKLIST
SCHOOL FACILITY PROGRAM
Form SAB 50-MP (NEW xx/26)

STATE ALLOCATION BOARD
OFFICE OF PUBLIC SCHOOL CONSTRUCTION

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 Locater (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, active school facilities, sites, 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.

☐ 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 changes 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).

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:

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.

- 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).

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.

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).

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.

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.

STATE OF CALIFORNIA
APPLICATION FOR FUNDING
SCHOOL FACILITY PROGRAM
SAB 50-04 (REV ~~08/25~~XX/XX)

STATE ALLOCATION BOARD
OFFICE OF PUBLIC SCHOOL CONSTRUCTION

The school district named below applies to the State Allocation Board via the Office of Public School Construction for a grant under the provisions of Chapter 12.5, Part 10, Division 1, commencing with Section 17070.10, et seq., of the Education Code and the Regulations thereto.

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

1. Type of Application—Check Only One

- ☐ New Construction
- ☐ New Construction (Final Apportionment)
- ☐ New Construction (Final Charter School Apportionment)
- ☐ New Construction (Overcrowding Relief Grant)
- ☐ Rehabilitation (Final Charter School Apportionment)
- ☐ Modernization
- ☐ Modernization of California Schools for Deaf/Blind
- ☐ Facility Hardship [Section 1859.82.1]
  - ☐ Conceptual Approval [Section 1859.82.3(a)]
  - ☐ Replacement Site
  - ☐ Replacement School Building(s):
    - Toilets (sq. ft.) _____
    - Other (sq. ft.) _____
  - ☐ Rehabilitation Costs: $_____
- ☐ Seismic Mitigation [Section 1859.82.2]
  - ☐ Conceptual Approval [Section 1859.82.3(b)]
  - ☐ Replacement Site
  - ☐ Replacement School Building(s):
    - Toilets (sq. ft.) _____
    - Other (sq. ft.) _____
  - ☐ Seismic Rehabilitation Grant: $_____

Separate Apportionment

- ☐ Site Only—New Construction [Section 1859.81.1]
- ☐ Site Only (District owned)—New Construction [Section 1859.81.2]
- ☐ Site Only—Environmental Hardship [Section 1859.75.1]
- ☐ Design Only—New Construction [Section 1859.81.1]
- ☐ Design Only—New Construction with High Performance
- ☐ Design Only—Modernization
- ☐ Design Only—Modernization with High Performance
- ☐ Design Only—Modernization of California Schools for Deaf/Blind
- ☐ Design Only—Facility Hardship [Section 1859.82.1]
- ☐ Design Only—Seismic Mitigation [Section 1859.82.2]
- ☐ Advance Funding for Evaluation and RA

2. Type of Project

a. ☐ Elementary School
☐ Middle School
☐ High School

Total Pupils Assigned:
K–6: _____
7–8: _____
9–12: _____
Non-Severe: _____
Severe: _____

b. ☐ 50 Years or Older Building Funding (Modernization Only)
Total Eligible Classrooms/Square Footage: _____
Classroom/Square Footage at Least 50 Years Old: _____
Ratio of 50 Years Old Classrooms/Square Footage: _____ %

From 2a above, how many are 50 Year or Older Pupil Grants?
K–6: _____
7–8: _____ Non-Severe: _____
9–12: _____ Severe: _____

c. Included in 2a above, how many pupils are generated by the Alternative Enrollment Projection? (New Construction Only)
K–6: _____
7–8: _____ Non-Severe: _____
9–12: _____ Severe: _____

d. If the request is to replace 75 Years or Older Facilities (Modernization Only)
Number of existing classrooms being demolished _____
The total square footage of non-classroom space being demolished _____
The number of classrooms being constructed _____
The total square footage of non-classroom space being constructed _____
From 2a above, how many are 75 Years or Older Pupil Grants?
K–6: _____
7–8: _____ Non-Severe: _____
9–12: _____ Severe: _____

e. Is this a 6–8 school? ☐ Yes ☐ No
If you answered yes, how many K–6 pupils reported above are sixth graders? _____
Is this an Alternative Education School? ☐ Yes ☐ No

f. Is this a use of grant request pursuant to Section 1859.77.2? ☐ Yes ☐ No
Is this request pursuant to Section 1859.77.2(c)? ☐ Yes ☐ No
If yes, enter date of successful bond election: _____
Is this a use of grant request pursuant to Section 1859.77.3? ☐ Yes ☐ No
Is this request pursuant to Section 1859.77.3(c)? ☐ Yes ☐ No
If yes, enter date of successful bond election: _____

g. Charter School Facilities Program Rehabilitation Request:
Toilets (sq. ft.) _____
Other (sq. ft.) _____

h. Project to be located on:

- ☐ Leased Site
- ☐ New Site
- ☐ Existing Site with Additional Acreage Acquired
- ☐ Existing Site with No Additional Acreage Acquired

i. ORG Projects Only

NAME OF ELIGIBLE SCHOOLSITE(S)	NUMBER OF PORTABLES BEINGREPLACED	NUMBER OF SITE SPECIFIC ELIGIBLE PUPILS BEING REQUESTED
	Total	

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

Grade	3rd Prev. /	2nd Prev. /	Previous /	Current /
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: _____

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

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.

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 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,

- 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,

- 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

STATE OF CALIFORNIA

APPLICATION FOR CHARTER SCHOOL PRELIMINARY APPORTIONMENT

SCHOOL FACILITY PROGRAM

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

STATE ALLOCATION BOARD
OFFICE OF PUBLIC SCHOOL CONSTRUCTION

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~~aquisition~~ 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.goc/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).

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

a. Select the type of project that best represents this application request.
b. 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

a. Enter the estimated number of pupils, by grade level, that will attend the Charter School.
b. 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).
c. 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.

a. Check the box if the applicant request additional funding due to multilevel construction. See Section 1859.163.1(a)(2).
b. Site Acquisition:

   1) 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.
   2) 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.
   3) 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).

c. 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.

d. Check the box if the proposed project is eligible for an increase due to geographic location. See Section 1859.163.1(a)(7).
e. Check the box if this request is for a small size project. See Section 1859.163.1(a)(5).
f. 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

a. Check the box if the proposed project is eligible for an increase due to geographic location. See Section 1859.163.5(a)(4).
b. Check the box if this request is for a small size project. See Section 1859.163.5(a)(2).
c. Check the box if the proposed project qualifies for an urban location allowance. See Section 1859.163.5(a)(3).
d. 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.
e. Enter the number of additional stops on new DSA required elevator(s) beyond two.

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.

STATE OF CALIFORNIA

APPLICATION FOR CHARTER SCHOOL PRELIMINARY APPORTIONMENT

SCHOOL FACILITY PROGRAM

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

STATE ALLOCATION BOARD
OFFICE OF PUBLIC SCHOOL CONSTRUCTION

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

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.

• 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

STATE OF CALIFORNIA
APPLICATION FOR CAREER TECHNICAL EDUCATION FACILITIES FUNDING
SCHOOL FACILITY PROGRAM
SAB 50-10 (REV ~~10/14~~ XX/XX)

STATE ALLOCATION BOARD
OFFICE OF PUBLIC SCHOOL CONSTRUCTION

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.

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.

STATE OF CALIFORNIA
APPLICATION FOR CAREER TECHNICAL EDUCATION FACILITIES FUNDING
SCHOOL FACILITY PROGRAM
SAB 50-10 (REV ~~10/14~~ XX/XX)

STATE ALLOCATION BOARD
OFFICE OF PUBLIC SCHOOL CONSTRUCTION

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,

- 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 (l) 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		

STATE OF CALIFORNIA
APPLICATION FOR NATURAL DISASTER ASSISTANCE

STATE ALLOCATION BOARD
OFFICE OF PUBLIC SCHOOL CONSTRUCTION

SAB 195 (~~New xx/25~~ REV XX/XX)

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/opsconline.

1. Type of Application

a. Check the appropriate box that indicates whether this application is a new or an amended Natural Disaster Assistance request.
b. 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.
c. 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.
d. 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.
e. 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:

a. 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.

STATE OF CALIFORNIA
APPLICATION FOR NATURAL DISASTER ASSISTANCE

STATE ALLOCATION BOARD
OFFICE OF PUBLIC SCHOOL CONSTRUCTION

SAB 195 (~~New xx/25~~ REV XX/XX)

SCHOOL DISTRICT		APPLICATION NUMBER
SCHOOL NAME		PROJECT TRACKING NUMBER
COUNTY	DISTRICT REPRESENTATIVE'S E-MAIL ADDRESS	HIGH SCHOOL ATTENDANCE AREA (HSAA) OR SUPER HSAA (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): _____

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:

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:

STATE OF CALIFORNIA
APPLICATION FOR NATURAL DISASTER ASSISTANCE

STATE ALLOCATION BOARD
OFFICE OF PUBLIC SCHOOL CONSTRUCTION

SAB 195 (~~New xx/25~~ REV XX/XX)

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,

• 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.

SIGNATURE OF AUTHORIZED SCHOOL DISTRICT REPRESENTATIVE	DATE

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

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

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

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

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Introduction

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

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

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



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



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



This icon appears for any other helpful hints from OPSC.

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

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

What is the Five-Year School Facilities Master Plan?

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

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

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

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

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

In summary, Proposition 2 requires the following:

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

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

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

Who must submit it?

EC Section 17070.54 requires the submittal of a Five-Year School Facilities Master Plan as a condition of participating in the SFP. Therefore, any school district or county office of education that submits an application for funding under the SFP (New Construction, Modernization, Small School District Program [SSDP], Charter School Facilities Program [CSFP], Career Technical Education Facilities [CTEFP][3], and/or Facility Hardship/Seismic Mitigation programs), must submit a Master Plan. However, Joint Powers Authorities (JPA) and independent Charter Schools are exempt from this requirement as these entities are not considered school districts[4].

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 *Expenditure Report* (Form SAB 50-06) if it is submitted less than 18 months following fund release
*Applications submitted on October 31, 2024 and through 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 on October 31, 2024 and through 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 on October 31, 2024 and through 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 Master Plan and any other linked documents 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, sites, 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.
- ☐ 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.[5]
- 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

[5] For the purposes of SFP, districts should use the statutory/regulatory prescribed loading standards. However, each Master Plan should also acknowledge the reality of how classrooms are loaded at the local level and its impact on pupil capacity/facility planning, especially if it differs from prescribed loading standards.

- 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 modernization[6] (if applicable). For portable buildings, the age is determined by the year it was placed onsite[7].

OPSC also recommends including:

- A graphical image site plan/map showing all existing facilities that includes building identifiers (number, letter, etc.) and their use (classroom, library, etc.).
- The site plan/map should also include the Unique Building Numbers (UBN) for each building on a site, once DSA has assigned them. The UBN is obtained by providing DSA the application numbers for the original construction of the buildings on the site.
- If the inventory includes portables, the DSA application number that constructed that portable in the manufacturer's plant, typically indicated on the metal identification label affixed to the building frame.



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.

[6] In the SFP modernization program, age of buildings is one year after DSA approval date
[7] A footnote could be included if the portable buildings were previously stockpiled or relocated from other sites

Example 1- OPSC Elementary School Site Map

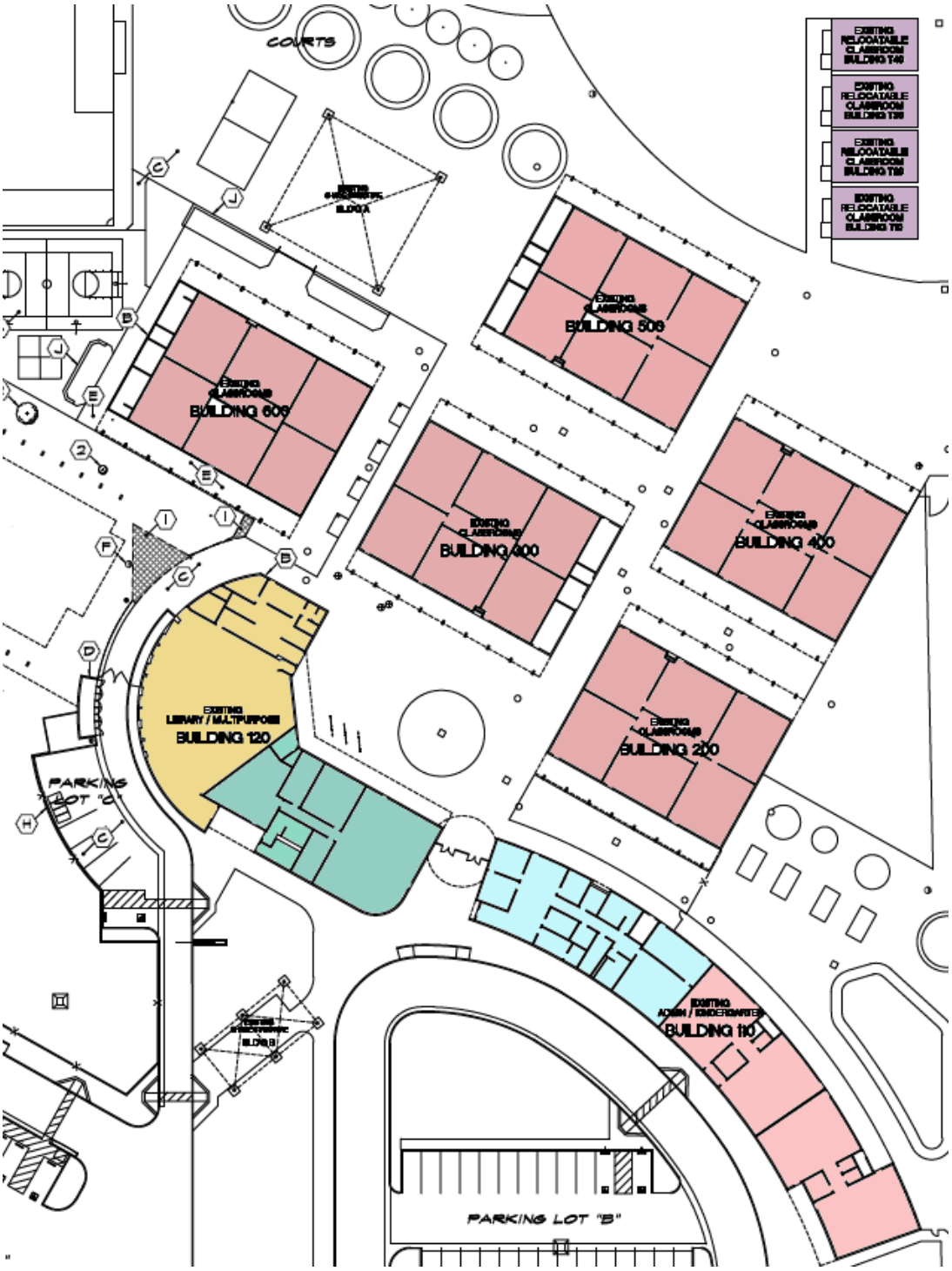


Table A

OPSC Elementary School **Total Classroom Count: 38** **Total Pupil Capacity: 950**									
Building Identifier	**Facility Use**	**Square Footage**	**Original DSA Construction Application #**	**Project Tracking Number (PTN)**	**Unique Building Number[8]**	**Year of Construction**	**Year of Modernization**	**Portable? Y/N**	**Classroom Count**
Building 110	Administration and Kindergarten Wing	7,180	02-123456	N/A	2123456-001	1972	2012	N	4
Building 120	Multipurpose Room/ Library Hybrid	6,000	02-123456	N/A	2123456-002	1972	2012	N	0
Building 200	Classrooms	5,760	02-123456	N/A	2123456-003	1972	2012	N	6
Building 300	Classrooms	5,760	02-678910	76543-5	2067891-001	2003	N/A	N	6
Building 400	Classrooms	5,760	02-678910	76543-5	2067891-002	2003	N/A	N	6
Building 500	Classrooms	5,760	02-678910	76543-5	2067891-003	2003	N/A	N	6
Building 600	Classrooms	5,760	02-678910	76543-5	2067891-004	2003	N/A	N	6
Building T10	Relocatable Classroom	960	02-112233	76543-2	2112233-001	1999	N/A	Y	1
Building T20	Relocatable Classroom	960	02-112233	76543-2	2112233-002	1999	N/A	Y	1
Building T30	Relocatable Classroom	960	02-112233	76543-2	2112233-003	1999	N/A	Y	1
Building T40	Relocatable Classroom	960	02-112233	76543-2	2112233-004	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.

[8] DSA will assign a Unique Building Number (UBN) for each building based on the original application number for the construction of the buildings. Do not attempt to predetermine these numbers. If the UBNs have not yet been DSA assigned for a site, they need not be included.

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 (1st-12th 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**
Square Footage Break Out	Kindergarten 1	Kinder CR	1,290
	Kindergarten 2	Kinder CR	1,290
	Kindergarten 3	Kinder CR	1,290
	Kindergarten 4	Kinder CR	1,290
	Kindergarten Restroom 1	Toilet	90
	Kindergarten Restroom 2	Toilet	90
	Main Office	Administration	960
	Teacher's Lounge	Administration	700
	Storage Closet	Other	55
	Staff Restroom	Toilet	125

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

Existing Classroom Capacity

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.

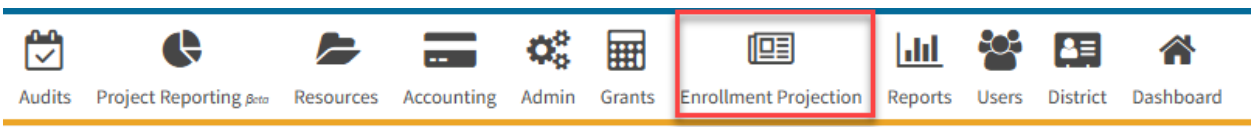
Regulation requires the Master Plan to include projected enrollment change information over the five years after the Master Plan submittal. The School Facility Program's *Enrollment Certification/Projection* (Form SAB 50-01) can be used for this purpose, part or in whole, depending on whether the application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

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

OPSC's website also currently features an Enrollment Calculator to assist districts in determining projected enrollment.



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

Historic District-Wide Enrollment

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

Five-Year Projected Enrollment

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

Capital Planning Budget

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

Facility Name	Hardcost
A. Warren McClaskey Adult Center	$542,524
A.M. Winn K-8	$35,722
Abraham Lincoln Elementary	$30,441
Albert Einstein Middle	$1,678,161
Alice Birney Public Waldorf K-8	$540,263
American Legion High	$24,649
Arthur A. Benjamin Health Professions High	$31,540
Bret Harte Elementary	$1,024,016
C.B. Wire Elementary	$473,526
C.K. McClatchy High	$6,333,995
Caleb Greenwood Elementary	$6,856
California Middle	$750,152
California Montessori Project - Capitol Campus K-8	$186,071
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

Vision Projects

School	Hardcost
Bowling Green Chacon Language & Science Academy Elementary	$35,996,740
Cesar E. Chavez Elementary	$29,112,150
Edward Kemble Elementary	$28,809,945
Ethel I. Baker Elementary	$27,441,310
Fern Bacon Middle	$53,482,600
Fr. Keith B Kenny K-8	$6,816,480
Leataata Floyd Elementary	$24,729,480
Nicholas Elementary	$38,301,030
Oak Ridge Elementary	$24,273,080
Pacific Elementary	$24,729,480
Peter Burnett Elementary	$33,049,100
Will C. Wood Middle	$55,609,400
Subtotal	$382,350,795

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

CAPITAL PROJECT FUND

Statement of revenues, expenditures and changes in fund balance for fund _____	Column 1 Amounts from District's Audited Financial Statement June 30, _____	Column 2 Subsequent Events as of _____	Column 3 Subsequent Events as of _____
Revenues (Actual):			
Developer Fees	$0	$0	$0
Federal Funds	0	0	0
Redevelopment Funds	0	0	0
Surplus Property Sales	0	0	0
General Obligation Bonds	0	0	0
Earnings on Investments	0	0	0
Other Local Revenues	0	0	0
Other -	0	0	0
(1) Total Revenues	$0.00	$0.00	$0.00

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

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

Bond Authority (ARBBA) List.

Assessed Current Value

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

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.

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

STATE ALLOCATION BOARD
OFFICE OF PUBLIC SCHOOL CONSTRUCTION

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/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
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.

Chapter 4: Other Considerations

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Introduction

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

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

Seismic Safety:

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

Sustainability

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

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

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

OPSC Joint Agency Workshop – Designing and Constructing Sustainable Facilities

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

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

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

Green Ribbon Schools Award Program

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

Collaborative for High Performance Schools (CHPS)

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

Leadership in Energy and Environmental Design (LEED)

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

Facility Inspection Tool Findings

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

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

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

School District's Education Specifications

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

> ***"The shape of our students' learning environment must be carefully planned to support our educational objectives as well as to provide clean, safe, and technologically up to date facilities. The planning process begins with the definition of educational goals and development of educational specifications."***
> *Education Specification: Linking Design of School Facilities to Educational Program, CDE, 1997*

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

AI Driven Educational Planning and Reporting Tools

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

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Appendix 1 - Authority

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

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

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

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

(1) An inventory of existing facilities, sites, and property pursuant to subdivision (d).

(2) Existing classroom capacity, as determined pursuant to Sections 17071.10 and 17071.25.

(3) Projected enrollment growth for the applicable school district over the next five years, accounting for growth pursuant to Sections 17071.75 and 17071.76.

(4) A capital planning budget outlining the applicable school district's projects.

(5) The financing and other funding sources that would be used to support the acquisition of the applicable schoolsite, new construction project, modernization project, and lead testing and remediation projects.

(6) Verification of the applicable school district's current assessed value from the appropriate local government entity that collects and maintains this information.

(7) The school district's deferred maintenance plan certified pursuant to Section 17070.75.

(8) A narrative describing how the school facilities master plan is consistent with the goals, actions, and services identified in the school district's local control and accountability plan for the first state priority, as described in paragraph (1) of subdivision (d) of Section 52060, as it relates to school facilities.

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

(1) The year each building at the school that is currently used for instructional purposes was constructed.

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

(3) The year, if any, each building that is currently used for instructional purposes was last modernized.

(4) The pupil capacity of the school.

(5) The age and number of portable buildings at the school.

(6) Whether the school has any of the following:

(A) A cafeteria or multipurpose room.

(B) A library.

(C) A gymnasium.

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

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

Appendix 2 – Form 1.02e Evaluation of School Facilities

School Facilities Unit
California State Department of Education

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

School	Grades
Reported by	Date of report

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

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		

School Facilities Unit
California State
Department of Education

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

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

Recommendations for needed corrections and improvements:

ATTACHMENT E

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

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.

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

STATE ALLOCATION BOARD
OFFICE OF PUBLIC SCHOOL CONSTRUCTION

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

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

STATE ALLOCATION BOARD
OFFICE OF PUBLIC SCHOOL CONSTRUCTION

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.

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

OFFICE OF PUBLIC SCHOOL CONSTRUCTION
STAKEHOLDER MEETING
February 13, 2025

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

PURPOSE

To discuss and receive stakeholder feedback 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.

BACKGROUND

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

In summary, Proposition 2 requires the following:

- School districts to include specified minimum elements as part of the required five-year school facilities Master Plan, including an inventory of existing facilities, sites, and property.
- The Office of Public School Construction (OPSC) to develop guidelines, in consultation with the California Department of Education (CDE), that school districts may use to guide the development of the school facilities Master Plan.
- OPSC to 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) to 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 to 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.

Before and after the passage of Proposition 2, OPSC continued to accept SFP applications on a flow basis. To acknowledge the statutory requirements for the

BACKGROUND (cont.)

Master Plan and to allow continued acceptance of applications, the State Allocation Board (Board) adopted the timelines and policies listed below on December 3, 2024. This policy is intended to ensure that program applicants are aware of their future obligation to comply with the new statute. Therefore, pending the effective date of the program regulations for the Master Plan, applications submitted to OPSC on or after October 31, 2024 must conform to the following:

- All districts must submit a governing board resolution acknowledging the submittal timeline requirements for the type of application submitted, and acknowledging that the project may be rescinded for failure to submit with the required components.
- Facility Hardship and Seismic Mitigation Program projects must submit the Master Plan with the substantial progress certification for construction of the project or the 100 percent complete *Expenditure Report* (Form SAB 50-06), whichever occurs first following the approval of the regulations.
- New Construction and Modernization applications received October 31, 2024 through 12 months following the Office of Administrative Law (OAL) approval of regulations must submit the Master Plan at time of application processing.
- New Construction and Modernization applications received more than 12 months following OAL approval of regulations must submit the Master Plan with the application.

A sample resolution is available on the OPSC website under Resources/School Facility Master Plans and is linked here: School Facility Master Plans.

STAFF ANALYSIS/DISCUSSION

This report provides an overview of the new and amended statutory requirements regarding the SFP Master Plan submittal requirements codified in EC Section 17070.54. The report is divided into Parts I and II. Part I summarizes the new SFP Master Plan requirements. Part II provides OPSC staff's initial interpretation of each subdivision and contextualizes the new requirements with current program requirements. Future stakeholder meetings will be held to discuss the guidelines for school districts to use in the development of the Master Plan.

Part I. Summary of EC Section 17070.54 (a) through (f)
Subdivision (a) states that as a condition of participation in the SFP, a school district must submit a Master Plan, or updated Master Plan, that has been approved by the governing board of the school district before submittal to OPSC.

Subdivision (b) states that the Master Plan "shall include information on the school district's eligibility for state bond funding" under the SFP.

STAFF ANALYSIS/DISCUSSION (cont.)

Subdivision (c) lists the information that must be included in the Master Plan, as follows:

(1) An inventory of facilities, sites and property described in subdivision (d).
(2) Existing classroom capacity pursuant to Sections 17071.10[1] and 17071.25[2].
(3) Projected enrollment growth over the next five years, accounting for growth pursuant to Sections 17071.75[3] and 17071.76[4].
(4) A capital planning budget outlining the district's projects.
(5) Fund sources that will 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 district's current assessed value from the appropriate local government entity that collects and maintains this information,
(7) The district's certified deferred maintenance plan pursuant to Section 17070.75[5].
(8) A narrative describing how the school facilities Master Plan is consistent with the goals, actions, and services identified in the district's local control and accountability plan for the first state priority, as described in paragraph (1) of subdivision (d) of Section 52060[6], as it relates to school facilities.

Subdivision (d) directs OPSC to work with CDE to develop the Master Plan guidelines, including guidelines or standards for school site inventories that include the following:

- For each building on the site currently used for instructional purposes, the year it was constructed, the building square footage and the year it was last modernized.
- The pupil capacity of the school.
- The age and number of portable buildings.
- Whether the school has a cafeteria or multipurpose room, a library, and/or a gymnasium.

Subdivision (e) states that the State "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

[1] EC Section 17071.10 requires districts to report Existing School Building Capacity for purposes of the New Construction program and was amended by Proposition 2. (*Existing School Building Capacity* (Form SAB 50-02))
[2] EC Section 17071.25 requires districts to report the grade level of the school buildings reported in 17071.10 and establishes classroom loading standards for the SFP. (Form SAB 50-02)
[3] EC Section 17071.75 provides the methodology for the New Construction Eligibility Determination (i.e. the Cohort Method) and was amended by Proposition 2. (*Enrollment Certification Projection* (Form SAB 50-01))
[4] EC Section 17071.76 provides the computation for high school attendance areas.
[5] EC Section 17070.75 requires districts to maintain school facilities funded by the SFP by establishing a routine restricted maintenance account.
[6] See Authority – Attachment A6a.

STAFF ANALYSIS/DISCUSSION (cont.)

required by Section 14502.1[7], as part of the audit procedures required pursuant to Section 41024[8]."

Subdivision (f) requires the district to update the Master Plan to reflect changes in enrollment, capacity, or other areas as appropriate.

Part II. OPSC Interpretation and Comments
OPSC is seeking stakeholder input for consideration to develop program regulations for the implementation and administration of these new requirements for the five-year Master Plan requirement. OPSC acknowledges that many districts may already have developed their own Master Plan documents that may conform to some elements listed in Proposition 2. Where appropriate, districts may be able to use elements common to both.

Subdivision (a) of EC Section 17070.54
To participate in the SFP on or after October 31, 2024, a district must submit a Master Plan, *or updated plan,* that conforms to the EC, which has been approved by the district's governing board. The Master Plan must be valid for five years. However, the parameters of the five-year period must be established. For example, at time of submittal, a district would theoretically have spent a number of months gathering the necessary information and developing the plan for presentation to its local governing board. The earliest/latest point in time that the information was gathered influences the relevance of the data. Staff is seeking stakeholder feedback on the timing of the five-year period. As noted in the Background section above, the Board took action on December 3, 2024 regarding timelines for submittal of the Master Plan to allow districts to continue submitting applications to OPSC while the implementation process proceeds. Stakeholders can also provide feedback on the adopted timelines for submittal of the Master Plan.

Considerations
1. What duration of the five-year plan should remain to be acceptable?
2. Is remaining duration based on application received date, OPSC processing date, or Board funding date?
3. When must updated plans be submitted?
4. For school districts with Master Plans with a duration longer than five years, such as a 10-year Master Plan that is five years old already, should a recently dated school board resolution accompany the plan to indicate it has been recently reviewed and still accurate?
5. Is acceptance of an addendum to a school district's existing Master Plan acceptable to add required Proposition 2 components?

OPSC invites stakeholder comment on these considerations.

[7] See Authority – Attachment A6a.
[8] See Authority – Attachment A6a.

STAFF ANALYSIS/DISCUSSION (cont.)

Subdivision (b) of EC Section 17070.54
This requirement is broad and thus merits further definition. OPSC currently maintains districts' "eligibility for state bond funding" under the SFP by capturing submitted and Board-approved New Construction and Modernization program eligibility applications and adjustments in the OPSC Online database.

OPSC interprets this subdivision to mean that school districts' Master Plans should consider existing SFP eligibility, as well as well as potential SFP program eligibility. The statute does not appear to require school districts to submit, nor OPSC to process, eligibility applications for New Construction and eligibility applications for all school sites for Modernization.

Subdivisions (c)(1) through (8) of EC Section 17070.54 state the school facilities Master Plan shall include, but is not limited to, all of the following information:

Subdivision (c)(1) of EC Section 17070.54 -- Inventory of Existing Facilities, Sites, and Property as Described in (d)
Because subdivision (c)(1) requires an inventory of facilities described in (d), this section will address both subdivisions together. According to subdivision (d), OPSC, in consultation with CDE, shall develop guidelines or standards for school site inventories that include the following:

- For each building on the site currently used for instructional purposes, the year it was constructed, the building square footage and the year it was last modernized.
- The pupil capacity of the school.
- The age and number of portable buildings.
- Whether the school has a cafeteria or multipurpose room, a library, and/or a gymnasium.

The inventory components listed above are substantially similar to the information that is submitted along with the *Eligibility Determination* (Form SAB 50-03) when a district establishes Modernization eligibility for a site and the *Existing School Building Capacity* (Form SAB 50-02) for New Construction.

The Form SAB 50-03 requires a site map that indicates all permanent and portable classrooms and/or facilities on the site, as well as their age, square footages, and usage. This information is then summarized on the OPSC Site Inventory worksheet. The Form SAB 50-02 captures the number, type (permanent or portable) and grade level of all classrooms on a district-wide or High School Attendance Area (HSAA) filing basis. Individual site data is captured on Site Analysis Worksheets and summed on the Form SAB 50-02.

Thus, existing forms could be used to meet a number of the Master Plan requirements.

STAFF ANALYSIS/DISCUSSION (cont.)

Although subdivision (c)(1) requires districts to submit inventory information for all sites with each Master Plan submittal, OPSC is not required to process an establishment or update existing eligibility on file for every Master Plan submittal. If that is desired by a district, OPSC would need completed eligibility forms.

Therefore, OPSC is seeking stakeholder feedback on how to approach leveraging existing requirements with the new requirements of Proposition 2 for capturing inventory information at this time, with the goal of minimizing duplicative requirements. A future meeting will delve deeper into guidelines for the overall Master Plan and inventory development.

Subdivision (c)(2) of EC Section 17070.54 -- Existing classroom capacity - EC Sections 17071.10 and 17071.25.
The second component of the SFP Master Plan is the existing classroom capacity. As noted above, when establishing New Construction eligibility the first time, districts submit this information using the Form SAB 50-02. Historically, this one-time report was only resubmitted when a district reorganizes.

EC Section 17071.10 was amended by Proposition 2 to add subdivision (b)(2), which requires that this one-time report of existing school building capacity be updated and included in the SFP Master Plan submittal. In addition, subdivision (d) was added to EC 17071.10 and requires a district that participates in the New Construction program or Modernization program after November 5, 2024, to "submit an updated report of the school district's existing school building capacity to the board," notwithstanding the previous provisions regarding submittal of the "one-time report."

Based on the new requirement in EC Section 17071.10(d), school districts submitting New Construction or Modernization applications after November 5, 2024 will need to submit an updated report of their existing school building capacity, using the Form SAB 50-02, to comply with statute.

OPSC notes that Section 14 of the existing *Application for Funding* (Form SAB 50-04) requires school districts to report all classrooms constructed or replaced with local funds outside of an SFP-funded project. This information is currently used by OPSC to adjust the district's New Construction baseline eligibility pursuant to SFP Regulation Section 1859.51. OPSC proposes the continued use of Section 14 of the Form SAB 50-04 as the mechanism to report all classrooms constructed or replaced with local funds outside of the SFP. Any eligibility adjustments that are necessary will be noted by the school district via Section 14 of the Form SAB 50-04 and will be submitted to the Board as eligibility adjustments, as has been done in the past. These two steps together will address the requirements outlined in 17071.10(d).

Staff is requesting stakeholder feedback on this interpretation.

STAFF ANALYSIS/DISCUSSION (cont.)

Subdivision (c)(3) of EC Section 17070.54 -- Projected enrollment growth for the applicable school district over the next five years, accounting for growth pursuant to EC Sections 17071.75 and 17071.76.
OPSC interprets this subdivision to mean that school districts' Master Plans should address projected enrollment growth. The statute does not appear to require school districts to submit, nor OPSC to process, applications for the establishment and/or update of New Construction eligibility unless otherwise requested by school districts.

EC Section 17071.75 is the SFP New Construction eligibility determination and remains mostly unchanged from the language of this Section prior to adoption of Proposition 2. EC Section 17071.76 continues to allow districts to base their New Construction eligibility on a high school attendance area. Districts establishing New Construction eligibility and applying for New Construction funding are already required to update their projected enrollment growth in this manner using the *Enrollment Certification Projection* (Form SAB 50-01).

Proposition 2 amended subdivision (g) of EC Section 17071.75, the former three-year eligibility lock for small school districts, to increase the time period to five years. The proposed regulation change resulting from the amendment to EC Section 17071.75 (g) will be addressed in a separate item.

Staff interprets the remainder of EC Section 17070.54 (c)(3) to require districts to provide a narrative on how it will address projected enrollment growth in the district over the next five years. It is acknowledged that some districts may not be experiencing growth, and this scenario would be addressed as well. Additionally, a school district should address all potential funding sources in the Master Plan, which may include potential SFP funding. However, no SFP funding is guaranteed until the Board approves it. Therefore, a district could cite estimated eligibility anticipated to be available for their project without submitting an eligibility establishment or update officially to OPSC. Many school districts already do this in their planning.

Subdivision (c)(4) of EC Section 17070.54 -- A capital planning budget outlining the applicable school district's projects.
OPSC is seeking stakeholder feedback on how a district would comply with this requirement.

Subdivision (c)(5) of EC Section 17070.54 -- 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.
This subdivision appears to be applicable to the specific project(s) that the Master Plan accompanies. Some districts already submit this information to OPSC when

STAFF ANALYSIS/DISCUSSION (cont.)

applying for Financial Hardship status using the Financial Hardship Fund Worksheet. One option is to use this form to fulfill the requirement.

The project list is inconclusive. It could refer only to the New Construction, Modernization and the new Lead Remediation Programs. Or it could be more broadly interpreted to include the Career Technical Education and Charter School Facilities Programs, which also fund construction of new and Modernization (aka rehabilitation) of existing facilities. These programs do not have a Financial Hardship component. They offer loans to cover the applicant's matching share.

Staff requests stakeholder feedback on this interpretation.

Subdivision (c)(6) of EC Section 17070.54 -- Verification of the applicable school district's current assessed value from the appropriate local government entity that collects and maintains this information.
Some districts already submit this information to OPSC when applying for Financial Hardship assistance for purposes of verifying a district's bonding capacity. Statute now requires this information to be updated and included in the Master Plan. As part of the potential adjustment to a district's matching share, this information could potentially be included on an updated version of the Form SAB 50-04. Therefore, a district could submit this information in that manner.

Subdivision (c)(7) of EC Section 17070.54 -- The school district's deferred maintenance plan certified pursuant to Section 17070.75.
The requirements of EC Section 17070.75 remain unchanged by Proposition 2. As a condition of funding, this section requires districts to create and contribute funds to a routine restricted maintenance account (also known as RRMA). Additionally, districts are required to have publicly approved an ongoing and major maintenance plan that outlines the use of the funds deposited, or to be deposited, as well as other requirements.

For purposes of the Master Plan, OPSC proposes that a district could submit a URL link to the locally approved maintenance plan or to the local board agenda where it was approved to demonstrate compliance.

Subdivision (c)(8) of EC Section 17070.54 -- 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.
EC Section 52060(d)(1) states that the first state priority for the local control and accountability plan as it relates to school facilities is that the "…school facilities are maintained in good repair, as defined in subdivision (d) of Section 17002." Section 17002(d) provides a definition for "good repair."

STAFF ANALYSIS/DISCUSSION (cont.)

OPSC suggests that the district would include a narrative in the Master Plan as required by the statute. OPSC invites stakeholder feedback as to the content, its length, and breadth and/or if districts have a current document that would meet this requirement.

Subdivision (d) of EC Section 17070.54 – Discussion above with (c)(1).

Subdivision (e) of EC Section 17070.54
The Controller shall include the instructions necessary to verify that all 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.

OPSC is not seeking feedback on this section at this time. Any amendments to the audit guide will be addressed during the Controller's annual audit guide update process. At that time, OPSC will present proposed changes to the audit guide and seek stakeholder feedback in that forum.

Subdivision (f) of EC Section 17070.54
Requires the school district 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.

This subdivision is discussed above as part of subdivision (a).

Future Stakeholder Meetings
OPSC will meet with CDE to discuss the creation of guidelines for the Master Plan requirements and welcomes comments in advance of the next stakeholder meeting for OPSC's consideration on the following:

1. Guidelines for school districts to use in the development of the Master Plan.
2. Other information that should be required to include in the Master Plan.
3. Guidelines or standards for school districts to use in development and submittal of the facilities inventory required as a component of the Master Plan.

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.

(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 17070.54

Note: Hyperlinks to the EC citations are provided below. The sections that were amended by Chapter 81, Statutes of 2024 (AB 247) are notated by *italics*.

EC Section 14502.1 – Financial and Compliance Audits

EC Section 14502.1.

EC Section 17070.75 – Routine Restricted Maintenance Requirements

EC Section 17070.75.

EC Section 17071.10 - Existing School Building Capacity

(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 ~~three~~ *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.

School Facility Program Regulations References

Laws and Regulations can be accessed here: Laws, Regulations for School Construction Projects

School Facility Program Forms can be accessed here: Forms

Email to: OPSCCommunications@dgs.ca.gov

February 14th, 2025

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

Dear Ms. Kirk,

We write in response to the request from the Office of Public School Construction for public comment on the Proposition 2 Implementation Regulatory Process and the materials from January 30th and February 13th meetings. This letter addresses implementation regarding Topic 3 and Topic 7 of the Stakeholder Meetings.

Children Now is a non-partisan, whole-child research, policy development and advocacy organization dedicated to promoting children's health, education, and well-being in California. The organization also leads The Children's Movement of California, a network of more than 5,600 direct service, parent, youth, civil rights, faith-based and community groups dedicated to improving children's well-being.

Topic 3, Attachment A3, of January 30th, 2025 Stakeholder Meeting: Eligible Expenses

We deeply appreciate the State's allocation of $115 million for lead testing and remediation, as it provides local educational agencies (LEAs) an opportunity to continue to address their local remediation and testing efforts.

Section 17074.25. (a)(2) in Attachment A3 is missing any mention of testing as an eligible expense and only lists remediation—we request that testing be added back in as an eligible expense.

Additionally, Section 177077.60 (2)(c)(1) states that "A school district may request a grant for the replacement of a water outlet used for drinking or preparing food if the test results indicate lead levels for that water outlet exceed 15 parts per billion." While the replacement of the faucet or fixture may remediate the lead below 15 ppb, there will be some instances in which that is not sufficient and schools may need to install a filter or water filtration/hydration station.

We urge the Office of Public School Construction (OPSC) to allow the purchase of a certified filter as an eligible expense. If onsite water filtration is used to meet the requirements of this subdivision, the onsite water filtration device should be certified by an

independent American National Standards Institute (ANSI) accredited third-party certification body to NSF/ANSI 53 for lead reduction and NSF/ANSI 42 for particulate reduction (Class 1). Additionally, in meeting the requirements of this subdivision, a fixture should meet the requirements of Sections 116875 and 116876 of the Health and Safety Code.

Additionally, lead testing results can vary by time of day, time since the faucet was last used, and method of testing. We request that: 1) sampling should be conducted in accordance with Modules 4 and 5 of the United States Environmental Protection Agency's "3Ts for Reducing Lead in Drinking Water in Schools and Child Care Facilities" manual, or subsequent United States Environmental Protection Agency guidance as identified by the State Water Resources Control Board. Flushing should not be used to collect a first draw sample; and 2) a laboratory that evaluates a water sample for purposes of this section should have current accreditation pursuant to Article 3 (commencing with Section 100825) of Chapter 4 of Part 1 of Division 101 of the Health and Safety Code.

Lastly, there is a widespread lack of testing and remediation data for California's schools, which leaves parents, students, and teachers in the dark about the quality of their drinking water. In administering these grants, it is imperative that there is public reporting and contribution to a more comprehensive picture of California's school drinking water.

Topic #7, Attachment A7 of February 13th, 2025 Stakeholder's Meeting: Facilities Master Plan

Across California, more than 10,000 public schools serve more than 5.8 million K-12 students on over 131,000 acres of public land, every day. Much of that land is paved and lacks trees and shade. As temperatures continue to rise due to climate change, this situation is becoming a crisis for most public schools across the state.

When nature is absent in children's environments, they are denied the mental, physical, social-emotional, and learning benefits they need. Unshaded school grounds are dangerously hot. Research shows that on a sunny 90°F day, unshaded asphalt can reach 140°F or more and rubber "safety" surfaces can be more than 165°F. High temperatures severely impact children. Children engage in vigorous physical activity outdoors, and since they have smaller body mass to surface area ratios than adults, they are more vulnerable to heat.

Under Governor Gavin Newsom, California has adopted an Extreme Heat Action Plan outlining a strategic and comprehensive set of state actions to adapt and strengthen resilience to extreme heat. See more on the action plan here.

As you review school facility regulations and develop guidelines with the State Department of Education for the development of master plans, it is critical to update them with an understanding of climate impacts such as extreme heat and additional flooding. We urge you to update existing policies that guide design for public school facilities to eliminate barriers and catalyze natural greening at schools. Focus the policies and guidelines on direct benefits for children, including tree canopy coverage goals and incorporate nature-based outdoor learning spaces as instructional spaces and as critical components of all schools' facilities, treated the same way as indoor classrooms and sports facilities.

According to the California Department of Public Health, school districts and schools can help reduce heat exposure in schools and schoolyards through engineered and nature-based solutions. Examples include the following:

- Improve school building envelopes (for example, insulation, double-paned windows, window shading and air sealing). From a broader climate resiliency perspective, these improvements would ideally be completed in combination with other health and safety upgrades to ensure healthy air and indoor environmental quality (for example, lead, mold and asbestos remediation).
- Install cool roofs on schools.
- Plant trees to provide shade outdoors, both for the buildings and play areas.
- Install other outdoor shade structures, such as shade sails over playground equipment, outdoor dining and other outdoor common areas.
- Decrease asphalt cover and increase cool pavements, permeable surfaces, and natural ground cover, like gardens.
- Transition toward schoolyards with more trees and other greenery to reduce heat burden.
- Install or improve cooling equipment (like air conditioners or heat pumps), prioritizing energy-efficient equipment whenever possible.

The California Schoolyard Forest System® seeks to create schoolyard forests across PreK-12 public school grounds statewide to directly shade and protect students from extreme heat and rising temperatures due to climate change. This initiative was founded by Green Schoolyards America, California Department of Education, the California Department of Forestry and Fire Protection (CAL FIRE), and Ten Strands.

Climate and forestry experts recommend a 30% tree canopy coverage in cities to mitigate climate impacts. California schools are far from this goal. A multiyear investment in reaching 30% tree canopy coverage at K-12 public schools will achieve the following benefits:

- Vulnerable students protected from extreme heat and other climate impacts
- Improved health and learning outcomes
- Climate and environmental benefits, including carbon sequestration and stormwater management
- Workforce development opportunities
- Improved community resilience and health outcomes for millions of Californians

Long-term planning and sustained public funding investments are necessary to bring green schoolyards to scale across the state. In addition, policy and institutional barriers need to be addressed to ensure that those investments are successful in creating green, climate-resilient school grounds that serve the most vulnerable children and communities.

As OPSC adopts Proposition 2 guidelines for school facilities master plans, we encourage that the agency:

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

We appreciate the transparency and accessibility of OPSC's stakeholder engagement process and look forward to the implementation of Proposition 2 while empowering LEAs to design and modernize their schools through an equity lens. This will improve children's environmental health and school climate resilience for the next generation of students and educators.

Sincerely,



Colleen Corrigan
Senior Policy Associate
Children Now

Comments:

5-year school facility master plan by Richard Lyon on behalf of the **California Building Industry Association (CBIA).**

California home builders are proud to have been a key participant in the formation of the SFP and take our role as a program participant and funding partner very seriously. CBIA strongly supported AB 247 along with the programmatic changes it brought about including the requirement for districts to prepare and submit a 5-year capital facilities master plan (FMP) updated periodically.

We believe that the potential for costs to spin out of control is exacerbated when districts fail to do adequate long-range capital facilities planning. At the same time, because the new master plan requirement is a condition precedent to districts participating in the SFP and receiving state funding, the process should be easy for districts to navigate, accommodating and flexible.

We appreciate the excellent work that the staff of OPSC has done to date to formulate regulatory language necessary to implement AB 247.

With that said, what follows is a bullet point response to a number of the issues raised in the staff report of February 13:

- New construction and modernization applications received October 31, 2024, through 12 months following OAL approval should submit their FMP at the time of OPSC application processing.
- New construction and modernization applications received more than 12 months from OAL approval should submit their FMP along with their initial application.
- The process for updating plans should be flexible and uncomplicated. Districts should not have to "reinvent the wheel." Supplements and addendums to existing documents should be the approved method.
- As to the "process for supplementing," i.e., when must updates be submitted, we will defer to districts on this matter, but because the objective is to ensure the FMP represents a current and effective planning tool it makes sense that districts submit updates/addendums when their FMP undergoes a significant and substantial modification.
- While this may be stating the obvious, we think it important for the regulations to definitively state that if a project application came to OPSC before 10-31-24, the Proposition 2 FMP requirements do not apply.

Thank you. We recognize that this is an ongoing process, and we appreciate the ability to comment on matters of concern to us.

Richard Lyon, RJLyonconsulting@gmail.com

On behalf of the California Building Industry Association (CBIA)

Email to: OPSCCommunications@dgs.ca.gov

February 27, 2025

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

Dear Ms. Kirk,

We write in response to the request from the Office of Public School Construction (OPSC) for public comment on the Proposition 2 Implementation Regulatory Process and the agenda items from the February 13th meeting. This letter addresses implementation regarding Topic 7 (Five Year School Facilities Master Plan) of the Stakeholder Meetings. We are grateful for the opportunity to participate in this process and look forward to continued dialogue in the coming months.

UndauntedK12 is a nonprofit organization working to ensure that every student in California has the opportunity to attend a safe, healthy, and climate resilient school. Ten Strands is a California-based nonprofit dedicated to advancing environmental literacy within California's TK–12 school system.

California's K–12 public school students are increasingly at risk from severe weather, including more days of extreme heat, wildfires, and increased flooding. These severe weather impacts affect student health, safety, and learning, including lost school days when school campuses are closed. The good news is that research shows that resilient school buildings and grounds can keep students healthy, safe, and learning in spite of these impacts. In addition, energy efficient buildings and grounds can help advance California's energy goals.

We are grateful that Proposition 2, or Assembly Bill (AB) 247, specifically cites the opportunity for school districts to invest in climate adaptation and energy efficiency strategies to protect students in the face of climate change and simultaneously help the state meet its energy goals. Specifically:

- 17072.35 (a) states that a grant for new construction can be used for "costs of designs and materials that promote the efficient use of energy and water, the maximum use of natural lighting and indoor air quality" as well as "for the costs of design, materials, and

construction to advance state energy goals pursuant to state law, support outdoor learning environments, or to directly shade and protect pupils from higher average temperatures, which may include incorporating nature and natural materials."

- 17074.25 (a) (1) states that "a modernization apportionment may be used for the costs of design, materials, demolition, and construction to advance state energy goals pursuant to state law, support outdoor learning environments, or to directly shade and protect pupils from higher average temperatures, which may include incorporating nature and natural materials."
- 17077.35 provides for a grant adjustment not to exceed 5% for projects that "promote school facility energy efficiency approaching the ultimate goal of school facility energy self-sufficiency and pollution reduction." This section states that "[e]nergy efficiency components that enable school facilities to advance state energy goals and adapt to higher average temperatures that pose a threat to the health and safety of pupils and staff are eligible for inclusion into a project pursuant to this section."

The creation of school buildings and grounds that are both resilient to climate change impacts and that help the state meet its energy goals requires dedicated planning, which is best accomplished through a district's Facilities Master Planning process. **As OPSC works in consultation with the California Department of Education (CDE) to develop guidelines that school districts may use in the development of the School Facilities Master Plan, we encourage you to reference and recommend publicly available resources that can help school districts understand and plan for the climate impacts in the coming years and to provide access to other state resources that may help them in their planning.**

A recent report by the California Collaborative for Educational Excellence, in partnership with UndauntedK12 and Ten Strands, entitled *Climate Adaptation and Resilience at California's K–12 Schools: Actions and Recommendations for State and District Leadership* outlined four major climate change impacts that will impact schools.

1. Extreme Heat: Heat is already significantly impacting California schools and students, with effects projected to worsen in coming years. By 2045, more than one of every three California students will live in a community with at least 120 days of high heat per year—defined as days over 87 degrees or over the local high heat threshold—practically ensuring disruption to the school calendar.
2. Wildfires and Wildfire Smoke: The majority of California school districts today are at moderate or higher risk for wildfires, and evidence-based models suggest that by 2050, smoke pollution will be 50 percent greater than in 2020.
3. Storms and Flooding: Caught between intensifying drought and increased precipitation, California's school buildings are at risk. Prediction is difficult, but patterns suggest that by 2029, nearly every part of California will see average precipitation above historical norms.
4. Grid Instability: Storms, flooding, and heat waves, which bring the threat of wildfire, all threaten to disrupt the energy grid. With longer and more frequent power outages,

California can expect increased risks to schools, including unhealthy or unsafe learning conditions, and closures that disrupt learning.

In developing guidance in consultation with the CDE, we recommend including the following publicly-available resources that will support district leaders to understand how severe weather will impact their district in the coming years and actions they can take in designing school buildings and grounds. Those resources include:

- Climate Adaptation and Resilience at California's K–12 Schools: Actions and Recommendations for State and District Leadership provides specific recommendations to district leaders to address climate impacts in school building and ground design. (https://drive.google.com/file/d/1EZ-CMzoqK2-SK-rLdnARPYcq56H-aTPo/view)

- CA Data Initiative for Environmental and Climate Action in TK-12 Schools provides localized data to allow district leaders to better understand and plan for environmental and climate related data projections over the course of four decades. (https://sites.google.com/tenstrands.org/ca-envlit-scrs-data-project/explore-data-focus-areas/broader-context-factors/climate-impacts-broader-context?authuser=0)

- HVAC Choices for Student Health and Learning provides district leaders with specific recommendations in selecting HVAC systems that advance student health and safety. (https://www.undauntedk12.org/hvac-rmi)

- Decarbonization Roadmap for School Building Decision Makers provides a guide for school leaders to pursue healthy, efficient, carbon neutral school design, construction and operation. (https://newbuildings.org/resource/decarbonization-roadmap-guide-for-school-building-decision-makers/)

In addition to these resources, we also recommend including the following California state resources that can serve as a guide for decision-makers to align their efforts with state energy goals:

- Executive Order B-55-18 outlining California's goal to achieve carbon neutrality by 2045. (https://archive.gov.ca.gov/archive/gov39/wp-content/uploads/2018/09/9.10.18-Executive-Order.pdf)

- California Climate Adaptation Strategy (https://climateresilience.ca.gov)

- California's Extreme Heat Action Plan: Protecting Californians from Extreme Heat (https://resources.ca.gov/-/media/CNRA-Website/Files/Initiatives/Climate-Resilience/2022-Final-Extreme-Heat-Action-Plan.pdf)

We appreciate OPSC's continued effort to provide a transparent process to enable district leaders and partners to support the development of regulations to implement Proposition 2. We look forward to continuing to engage with OPSC throughout this process to help ensure that districts can access much needed facility funding while also creating healthy, safe, and resilient learning environments while furthering the state's energy goals.

Sincerely,



Jonathan Klein
Co-Founder and CEO
UndauntedK12



Andra Yeghoian
Chief Innovation Officer
Ten Strands

CLEAN AIR
Allies

Via Email

February 28, 2025 (by noon)

Brian LaPask, Chief of Program Services
Office of Public School Construction
707 Third Street, Fourth Floor
West Sacramento, CA 95605
OPSCCommunications@dgs.ca.gov

Re: Comments on 2/13/25 Proposition 2 Implementation Stakeholder Meeting, Topic 7 – Five-Year School Facilities Master Plan (Attachment A7)

Dear Mr. LaPask,

This communication responds to the Office of Public School Construction (OPSC)'s request for feedback regarding proposed regulatory amendments related to Five-Year School Facilities Master Plans (FMPs).

Clean Air Allies is a nonprofit parent/community stakeholder organization dedicated to improving indoor air quality in PK-12 schools as a matter of educational, environmental, and health import. As part of our California Alliance for Clean Air in Schools initiative, we've devoted significant attention to state school facilities funding and accountability mechanisms.

The following comments represent very preliminary thoughts based on the high-level staff analysis/discussion in Attachment A7 to the February 13, 2025 Proposition 2 Implementation Stakeholder Meeting Agenda and the meeting itself. More detailed comments in relation to future stakeholder proceedings are anticipated.

We appreciate OPSC's commitment to broad engagement and open dialogue in this process.

1. **Implementation of Education Code § 17070.54(c)(8) Should Encourage School Districts to Center Conditions of Learning and the Educational Program in Facilities Planning; Recapitulation of Facility Inspection Tool (FIT) Scores Is Not Adequate to this End.**

If safe, healthy school facilities are basic conditions of learning, not all school facilities spending is equal for educational purposes. A 2024 NBER Working Paper by Biasi et al. found that "Investments in school infrastructure such as HVAC, safety and health, plumbing, roofs, and furnaces produce large increases in test scores, likely because they improve students' learning experiences," as compared to "more visible" spending such as on "athletic facilities and the expansion of classroom space" (31).

In existing facilities master planning guidance, the California Department of Education (CDE) has emphasized that school facilities' form should follow educational function (7, 26). Existing CDE regulations state that "Educational facilities planned by school districts shall be: a. Evolved from a statement of educational program requirements which reflects the school district's educational goals and objectives." (CCR, Title 5, § 14001.)

Education Code § 17070.54's reference to Education Code § 52060, which involves Local Control and Accountability Plans (LCAPs), and in particular to that statute's own reference to *Williams*, evinces concern about the strategic alignment of school facilities planning with student safety, health, and learning. An important goal in implementation of § 17070.54 should be to encourage school districts to center conditions of learning and the educational program in their facilities planning.[1]

In particular, Education Code § 17070.54 reads:

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

Education Code § 52060 comes under the article governing LCAPs, created in 2013 as part of adoption of the Local Control Funding Formula (LCFF). All school districts must adopt an LCAP triennially and update it each year in a process involving various stakeholders, including parent advisory committees, and the opportunity for public comment.

According to CDE's LCAP Template Instructions, the LCAP process "serves three distinct, but related functions":

- "Comprehensive Strategic Planning," including around "hard choices … about the use of limited resources to meet student and community needs";
- "Meaningful Engagement of Educational Partners," as "effective strategic planning will incorporate these perspectives and insights"; and
- "Accountability and Compliance" around "various requirements."

Under § 52060 et seq., a school district's LCAP must address eight LCFF/LCAP "priority" areas (for county offices of education, ten), setting and tracking progress around related goals, specific actions/services, and expenditures.

[1] Existing CDE guidance on facilities master planning states that "educational program" refers to the "curricula, learning support programs, programs, and persons to be served; defines educational requirements; and represents local community consensus on educational priorities" (1).

The first priority area, described by CDE as "Priority 1 - Basic (Conditions of Learning)," clearly references the landmark *Williams* settlement and implementing law aimed at ensuring that all California students have access to basic conditions of learning:

> (d)(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**. (Emphasis added.)

According to CDE, the "desired results" of focusing school district attention on LCFF/LCAP Priority 1 as it relates to facilities include that:

> [They] develop and maintain facilities that promote the health and wellbeing of occupants, conserve energy and water, and promote clean indoor air. **[They] consider the manner in which a facility supports the educational program.** (Emphasis added.)

A key consideration for Priority 1 is "resource alignment": "spending the right amount of money on the right thing at the right time."

Thus, Education Code § 17070.54(c)(8) calls for school districts to address in "narrative" form how the FMP comports with Priority 1 of the LCFF/LCAP, which itself references *Williams* and is given shape through a process of comprehensive strategic planning, meaningful engagement, and accountability and compliance to ensure school facility conditions conducive to learning.

One can imagine an implementation of § 17070.54(c)(8) that simply invited school districts to include a few lines about recent Facility Inspection Tool (FIT) scores, given that the FIT is referenced in Education Code § 17002(d) and was created as a result of the *Williams* settlement. But such an approach would arguably provide little useful new information and forgo an opportunity for school district reflection on the alignment of facilities planning with provision of conditions of learning and support of the educational program.

The FIT as currently used is a reactive mechanism largely aimed at identifying urgent or emergency facilities conditions. (Compare Ed Code §§ 17002(d), § 35186(a-g), and 1240(c)(2)(E)(ii).) It relies on a snapshot-in-time "visual inspection" by persons without facilities expertise. (DGS OPSC 4.) It is not addressed to the age, underlying characteristics, "service life expectancies, replacement needs, or preventive maintenance" of buildings and building systems, subsystems, and components or to long-term planning around them. Indeed, by the express terms of § 17002(d)(1), the FIT may "not require capital enhancements beyond the standards to which the facility was designed and constructed."

In contrast, facilities master planning should involve a proactive and long-term focus, include input from facilities specialists as well as various non-specialist school stakeholders, and address any capital enhancements that may be needed to support educational goals as well as basic safety, health, and learning.

Further, the California State Auditor in late 2024 identified and made recommendations still to be implemented in relation to certain issues with the format of the FIT and deficiencies around its use by school districts and county offices of education (1-2).

Thus, information about recent scores on the FIT—at least as that tool currently exists—should not be the sole or primary input for the narrative required by § 17070.54(c)(8).

Instead, consistent with the spirit of *Williams*, the overall goals of the LCFF/LCAP, and the rightful educational context of school facilities master planning, the narrative required by Education Code § 17070.54(c)(8) should address how the FMP:

- promotes access to basic conditions of learning for all students;
- supports and is in strategic resource alignment with the school district's educational program and state-level priorities;
- reflects meaningful engagement with various stakeholders across the school district community; and
- advances accountability and compliance.

These components are consistent with those that CDE has laid out in existing facilities master planning guidance (Appendix 1).

2. A Different *Williams*-Related Instrument Offers a Potential Model for Facility Systems, Subsystems, and Components Data that Should Be Collected as Part of the Inventory Required by Education Code § 17070.54(c)(1).

The lack of consistent and centralized data around various aspects of California school facilities has been a recurrent concern expressed by a number of different stakeholders, who have pointed out that its absence makes it difficult to "spend adequately or efficiently and target places where facility need is greatest" (32). The California State Auditor's 2022 report "School Facilities Program: California Needs Additional Funding and a More Equitable Approach for Modernizing Its School Facilities" also identified the lack of a current "comprehensive set of data" as a problem in this respect (12-13, 19). As the report noted, the last attempt to collect such a set of data took place in the mid-2000s as part of the *Williams* settlement (12). That initiative was the School Facility Needs Assessment Grant Program (SFNAGP).

To implement the SFNAGP needs assessment mandated by Education Code § 17592.70, OPSC developed forms, including the web-based Form SAB 61-01, as well

as a related “Needs Assessment Report Worksheet.” School districts that participated could use the data collected to identify necessary repairs so as to seek reimbursement (and later grant funding) through the Emergency Repair Program (ERP) created by the *Williams* settlement alongside the SFNAGP. (Ed Code § 17592.71 et seq.) They also were required to use the SFNAGP needs assessment as the baseline for the ongoing “facilities inspection system” that the *Williams* settlement made a condition of eligibility for the School Facility Program (SFP). (Ed Code §§ 17070.75(f), 17592.70(d)(3).)

Education Code § 17070.54(c) requires that a “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).”

Section 17070.54(d) states:

> 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.

By express statutory terms, the list in § 17070.54(d) is not exhaustive, “including, but not limited to” the enumerated components.

The staff analysis/discussion in Attachment A7 suggests that the enumerated inventory components are “substantially similar to the information that is submitted” in Forms SAB 50-03 and SAB 50-02 (18).

But missing from the list and Forms SAB 50-02 and SAB 50-03 are building systems, subsystems, or components. Nor will an inventory of these necessarily be included in

deferred maintenance plans certified pursuant to § 17070.75 in relation to routine restricted maintenance accounts (RRMAs), as a number of school districts appear to simply generate a summary along the lines of former Form SAB 40-20. (See Ed Code § 17070.54(c)(7).)

According to existing CDE guidance on facilities master planning, an FMP should assess the "condition and adequacy of existing facilities" and identify "needed improvements and their implementation costs" (2).

To aid in comprehensive strategic planning and resource alignment at the local level, and in service of a comprehensive set of state-level data, school districts should be required to include in the "inventory of existing facilities, sites, and property" in their FMPs some form of standardized assessment of building systems, subsystems, and components in existing facilities and needed improvements and costs.

For the reasons discussed in the previous section, the FIT is not well suited to this purpose. However, the SFNAGP Needs Assessment Worksheet, a copy of which is attached to this letter, does offer a potential model–especially in Parts III and V. Further, requiring data that at least overlaps with that collected through the SFNAGP would allow for potentially useful historical comparison given that more than 2,000 schools submitted needs assessment data through that program.

In any event, some form of standardized assessment of the condition, adequacy, and necessary repairs/improvements of building systems, subsystems, or components should be required as part of the "inventory of existing facilities, sites, and property" that school districts must include in FMPs pursuant to Education Code § 17070.54(d).

Clean Air Allies thanks OPSC for its attention to these comments. Please don't hesitate to reach out with any questions to cleanairalliesorg@gmail.com or (415) 516-9293.

Very truly yours,



JuNelle Harris
Co-Founder
Clean Air Allies/California Alliance for Clean Air in Schools

attachment

OFFICE OF PUBLIC SCHOOL CONSTRUCTION

NEEDS ASSESSMENT REPORT WORKSHEET

SCHOOL FACILITIES NEEDS ASSESSMENT GRANT PROGRAM

LOCAL EDUCATIONAL AGENCY	SCHOOL NAME

GENERAL INFORMATION

This worksheet was designed to assist Local Educational Agencies (LEAs) in preparing a Needs Assessment Report (Form SAB 61-01). The worksheet provides information on the data to be gathered to successfully complete a Web-Based Needs Assessment Report. It is recommended that the inspectors use the Worksheet as they perform the on-site review of the school facility. Qualified inspectors must be hired by the LEA to complete Parts III, IV and V of the Needs Assessment Report.

The assessment, which must be submitted electronically to the OPSC, must be accompanied by a hard copy submittal of the certification page along with a site diagram of the school which must identify all buildings on the site. In addition, for Special Education programs operated in multiple locations under a single County-District-School (CDS) code, the LEA must provide a summary of all buildings identified in the assessment with a corresponding address of the physical location of the buildings as well as the CDS codes of the school sites on which the Special Education buildings are located, if applicable. The LEA must complete all the submittals by January 1, 2006.

In order to access the Web-Based Needs Assessment Report for any eligible school under its jurisdiction, the LEA must first complete and submit electronically the Certification of Eligibility, available at the OPSC's Web site at www.opsc.dgs.ca.gov.

For more information on the School Facility Needs Assessment Grant Program, including qualifications of the inspectors and submittal deadlines, refer to Regulation Sections 1859.302 through 1859.319.

SPECIFIC INSTRUCTIONS

Part I. Information

Gather the following information:

▶ Physical School Address: _____

_____

For Special Education programs operated in multiple locations under a single County-District-School (CDS) code, indicate "multiple locations" in lieu of a physical site address.

▶ Site Ownership: _____

Indicate whether the site is owned or leased by the Local Educational Agency (LEA).

▶ Existing Site Size (useable acres): _____

Useable Acres is the gross acreage of a school site less any portion of the site publicly dedicated for off-site street improvements and any portion of the site not available for school purposes as determined by the California Department of Education because of topological impediments or because of other unique circumstances.

▶ Does the School Operate on MTYRE Schedule? ☐ Yes ☐ No

If "Yes", indicate the type of MTYRE Operating Schedule: _____

Select one of the following: 60/20, 60/15, Orchard, 90/30, 45/15, Concept 6, Modified Concept 6, and Custom type.

▶ Lunch Facility(ies) on Site: _____

Indicate the type of facility used for pupil dining which is not designated for classroom instruction. Select one or more of the following: Lunch Shelter, Multipurpose Room, Cafeteria, Gymnasium, Auditorium. Indicate "none" if there is no lunch facility at the school.

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LOCAL EDUCATIONAL AGENCY	SCHOOL NAME

► Indicate the name and contact information for each person that participated in the completion of the assessment:

NAME		JOB TITLE
REPRESENTATIVE OF		AREA OF EXPERTISE
MAILING ADDRESS		
TELEPHONE NUMBER	FAX NUMBER	E-MAIL ADDRESS

NAME		JOB TITLE
REPRESENTATIVE OF		AREA OF EXPERTISE
MAILING ADDRESS		
TELEPHONE NUMBER	FAX NUMBER	E-MAIL ADDRESS

NAME		JOB TITLE
REPRESENTATIVE OF		AREA OF EXPERTISE
MAILING ADDRESS		
TELEPHONE NUMBER	FAX NUMBER	E-MAIL ADDRESS

NAME		JOB TITLE
REPRESENTATIVE OF		AREA OF EXPERTISE
MAILING ADDRESS		
TELEPHONE NUMBER	FAX NUMBER	E-MAIL ADDRESS

Use additional sheets if necessary.

OFFICE OF PUBLIC SCHOOL CONSTRUCTION

NEEDS ASSESSMENT REPORT WORKSHEET

SCHOOL FACILITIES NEEDS ASSESSMENT GRANT PROGRAM

LOCAL EDUCATIONAL AGENCY	SCHOOL NAME

Part II. Facility Inventory. Complete One Sheet for Each Building on the School Site.

▶ Include all buildings that house pupils and staff as part of the regular school curriculum.

Building ID	Enter the building identification number/letter as indicated on the site map to be submitted to the OPSC with the certification page of the Needs Assessment Report. The building ID must be unique and cannot be used to identify another building on the same site.	
Leased/Owned	Indicate whether the building is owned or leased by the LEA.	
Construction Type	Indicate whether the building is of permanent or portable construction. For a definition of portable classroom please refer to Education Code Section 17070.15(j).	
Square Footage	Indicate the total enclosed square footage of the building. For multilevel buildings, report the sum of the square footage at each level.	
Year Constructed	Enter the year of original construction. For purposes of this program, the year of construction shall be considered the date the Notice of Completion was filed with the county recorder, if available. If the date of the Notice of Completion is not available, the LEA may use the year of occupancy as evidenced by historical record.	
Year Modernized	Enter the year of the last building modernization project, excluding any routine and deferred maintenance regardless of the modernization project funding source. For purposes of the assessment, modernization means major improvements made to extend the useful life of, or to enhance the physical environment of the building.	
State-Funded Project	Check "yes" or "no" to indicate whether the modernization project was funded with State bond funds (partially or entirely), under the provisions of the Lease-Purchase Program (Leroy F. Greene State School Building Lease-Purchase Law of 1976) or School Facility Program (Leroy F. Greene School Facilities Act of 1998).	☐ Yes ☐ No
Facility Type	Select the type(s) of facilities housed in the building.	☐ Classrooms ☐ Library ☐ Multipurpose Room ☐ Gymnasium ☐ Auditorium ☐ Theater/Performing Arts ☐ Cafeteria ☐ Kitchen ☐ Administration ☐ Nurse's Office ☐ Toilet Facilities ☐ Counseling ☐ Other
Number of Classrooms	Report the number of classrooms in the building by grade level. For purposes of the assessment, classroom means a teaching station currently used as an area in which to provide pupil instruction including, but not limited to, standard classrooms, industrial arts/art rooms, business educational labs, science labs, homemaking labs, special education classrooms, and music classrooms.	K–6: _____ 7–8: _____ 9–12: _____ Non-Severe SDC: _____ Severe SDC: _____

Print as many sheets as necessary for the number of buildings on the school site.

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NEEDS ASSESSMENT REPORT WORKSHEET

SCHOOL FACILITIES NEEDS ASSESSMENT GRANT PROGRAM

LOCAL EDUCATIONAL AGENCY	SCHOOL NAME

Part III. Useful Life of Major Building Systems

▶ Use this section to identify useful life remaining of all major building systems on the school site. *For systems unique to a particular building, enter the building ID and complete a separate sheet*. Identify more than one building if necessary for systems that are present throughout multiple buildings on campus. Identify "campus-wide" in lieu of a particular building to evaluate systems that encompass the entire campus, such as a sewer system. Use zero as the remaining useful life for a component that is at the end or past its expected useful life.

Building Identification: _____

BUILDING SYSTEM	SUB-SYSTEM	ELEMENTS/MATERIALS	CHECK IF APPLICABLE	USEFUL LIFE REMAINING
Structural	Foundation	Concrete	☐	
		Other	☐	
	Wall Framing	Wood	☐	
		Other	☐	
	Floor Framing	Wood	☐	
		Other	☐	
	Roof Framing	Wood	☐	
		Other	☐	
Roofing	Roofing	Built-Up Roofing	☐	
		Roll Roofing	☐	
		Single-Ply Roofing	☐	
		Elastomeric Roofing	☐	
		Composition Shingles Roofing	☐	
		Sheet Metal Roofing	☐	
		Foam Roofing	☐	
		Tile Roofing	☐	
		Other	☐	
	Flashing and Sheet Metal	Gutters	☐	
		Downspouts	☐	
		Expansion Joints	☐	
		Other	☐	

Continue next page

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Building Identification: _____

BUILDING SYSTEM	SUB-SYSTEM	ELEMENTS/MATERIALS	CHECK IF APPLICABLE	USEFUL LIFE REMAINING
Exterior Envelope	Siding	Plywood Siding	☐	
		Hardboard Siding	☐	
		Wood Board Siding	☐	
		Lath and Plaster	☐	
		Other	☐	
	Exterior Doors	Doors	☐	
		Frames	☐	
		Hardware	☐	
		Other	☐	
	Windows	Frames	☐	
		Glass and Glazing	☐	
		Other	☐	
	Soffits and Overhangs		☐	
Interior Systems	Wall Finishes	Painted Gypsum Wallboard	☐	
		Ceramic Tile	☐	
		Paneling	☐	
		Tackable Wall Panels	☐	
		Other	☐	
	Flooring	Carpet	☐	
		VCT	☐	
		Sheet Vinyl	☐	
		Wood	☐	
		Tile	☐	
		Other	☐	
	Ceilings	Lay-In Acoustical Tile	☐	
		Glue-On Acoustical	☐	
		Painted Gypsum Wallboard	☐	
		Other	☐	
	Interior Doors	Doors	☐	
		Frames	☐	
		Hardware	☐	
		Other	☐	

Continue next page

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LOCAL EDUCATIONAL AGENCY	SCHOOL NAME

Building Identification: _____

BUILDING SYSTEM	SUB-SYSTEM	ELEMENTS/MATERIALS	CHECK IF APPLICABLE	USEFUL LIFE REMAINING
Plumbing	Plumbing Fixtures		☐	
	Water Piping	Galvanized Steel Pipe	☐	
		Copper Pipe	☐	
		Other	☐	
	Waste Piping	Cast Iron	☐	
		Other	☐	
	Water Heater	Gas-Fired Water Heater	☐	
		Electric Water Heater	☐	
		Other	☐	
	Gas Piping	Black Steel	☐	
		Other	☐	
Electrical Equipment	Lighting	Fixtures	☐	
		Flood Lighting	☐	
		Other	☐	
	Power	Switchboards	☐	
		Panel and Breakers	☐	
		Bus Duct	☐	
		Capacitor	☐	
		Switch Units	☐	
		Other	☐	
	Building Transformer	Dry Type	☐	
		Other	☐	
	Low-Voltage Systems	Telephone	☐	
		Data	☐	
		CCTV	☐	
		Public Address System	☐	
		Security Alarm	☐	
		Other	☐	

Continue next page

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Building Identification: _____

BUILDING SYSTEM	SUB-SYSTEM	ELEMENTS/MATERIALS	CHECK IF APPLICABLE	USEFUL LIFE REMAINING
Mechanical	Heating Ventilation and Air Conditioning (HVAC)	Central Type (Central Boiler – Hydronic Heating/Cooling Tower)	☐	
		Central Type (Central Boiler – Hydronic Heating/DX Cool)	☐	
		Multi Zone Package Roof-Top Unit (Gas Heat/DX Cool)	☐	
		Multi Zone Package Roof-Top Unit (Electric Heat/DX Cool)	☐	
		Single Zone Package Roof-Top Unit (Gas Heat/DX Cool)	☐	
		Single Zone Package Roof-Top Unit (Electric Heat/DX Cool)	☐	
		Single Zone Package Heat Pump Roof-Top Unit (Electric Heat/Electric Cool)	☐	
		Split System (Furnace Heat/Condensing Unit Cool)	☐	
		Wall Mounted Heat Pump (Electric Heat/Electric Cool)	☐	
		Other	☐	
	Heating and Ventilation (HV)	Central Boiler Hydronic Heating with Unit Heaters	☐	
		Central Boiler Hydronic Heating with Radiant Under-Floor Piping	☐	
		Furnace (Gas-Fired)	☐	
		Unit Heaters – Electrical	☐	
		Unit Heaters – Gas	☐	
		Other	☐	
	Ventilation and Exhaust System	Exhaust Fans	☐	
		Kitchen Hood and Exhaust Systems	☐	
		Other	☐	
Conveying Systems	Elevators		☐	
	Chair Lifts		☐	
	Other		☐	
Fire and Life Safety	Automatic Fire Sprinkler Systems	Wet Type	☐	
		Dry Type	☐	
		Other	☐	
		None	☐	
	Fire Pumps	Diesel Generator	☐	
		Other	☐	
	Fire Alarm System	Manual	☐	
		Automatic	☐	
		None	☐	

Use additional sheets as necessary.

OFFICE OF PUBLIC SCHOOL CONSTRUCTION

NEEDS ASSESSMENT REPORT WORKSHEET

SCHOOL FACILITIES NEEDS ASSESSMENT GRANT PROGRAM

LOCAL EDUCATIONAL AGENCY	SCHOOL NAME

Part IV. Five-Year Costs to Maintain Functionality

▶ Complete this section by estimating costs for each of the five years to maintain functionality of each building to provide a healthy, safe, and suitable learning environment. *Complete a separate sheet for each building identified in Part II*. Use a separate sheet and identify "campus-wide" in lieu of a particular building to estimate maintenance costs for a particular building component that is located throughout the entire campus.

For purposes of this section, accessibility includes any needed work to provide for proper accessibility to all instructional spaces including paving and other maintenance of all areas immediately surrounding the building entrance.

Building Identification: _____

BUILDING COMPONENT	2005/2006	2006/2007	2007/2008	2008/2009	2009/2010
Roofing					
Framing					
Flooring					
Siding					
Windows					
Doors					
Painting					
Potable/Drinking Water					
Sewer					
Gas					
Lighting					
Electrical Power					
HVAC/HV					
Fire and Life Safety					
Security					
Accessibility					
Playground and Field Areas					
Other					

Print as many sheets as necessary for the number of buildings on the school site.

OFFICE OF PUBLIC SCHOOL CONSTRUCTION

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LOCAL EDUCATIONAL AGENCY	SCHOOL NAME

Part V. Necessary Repairs

▶ Use this section to identify the necessary repairs at the school site, including any health and safety items. Use the building components identified in Part IV on page 7 to categorize the repair items. Repair cost estimates should include all related project costs. The dollar values assigned to the costs of the repairs are to be included in the district's first year cost estimate to maintain functionality of the facilities in Part IV.

REPAIR ITEM NUMBER	BUILDING COMPONENT	LOCATION (BUILDING ID)	DESCRIPTION OF THE DEFICIENCY	DESCRIPTION OF THE REPAIR	ESTIMATE OF REPAIR COSTS
					$
					$
					$
					$
					$
					$
					$
					$
					$
					$
					$
					$
					$
					$
					$
					$
					$
					$
					$
					$
					$

Use additional sheets if necessary.

Alberto M. Carvalho
Superintendent

Los Angeles Unified School District
Legislative Affairs & Government Relations

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February 28, 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 #2

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 February 13, 2025, Implementation Stakeholder Meeting #2.

Topic #6 – Interim Housing and Natural Disaster Assistance (Attachment A6)

The issue of interim housing assistance following a natural disaster raises several important considerations regarding eligibility, funding mechanisms, and regulatory clarifications.

Classroom Inventory Adjustments for Disaster-Related Replacements

In reference to Education Code section 17075.20(d)(2), OPSC states that any classroom portable purchased under section 17075.20(a) must be included in a district's classroom inventory, either when establishing new construction eligibility or through an adjustment if eligibility has already been established. However, clarification is needed to specify that when a portable is acquired

solely to replace a classroom destroyed in a natural disaster, it should not be added to the inventory, as it does not constitute an increase in capacity.

Charter School Eligibility for Interim Housing Assistance

There is ambiguity in the eligibility criteria for charter schools seeking interim housing assistance. While OPSC's analysis on page 6 concludes that charter schools cannot apply directly, a school district may apply on behalf of a charter school occupying district-owned facilities. However, Education Code section 17075.20(a) does not explicitly exclude charter schools on non-district-owned sites. Clarification is needed to determine whether a school district can apply on behalf of a charter school located on a non-district-owned site or if such schools are entirely ineligible for assistance.

Funding Challenges and Timing of Assistance

Timely access to interim housing assistance funding is critical, as schools need to accommodate displaced students immediately following a disaster. Waiting for reimbursement may present financial hardships. One proposed solution is for districts to submit a verified quote for the minimum amount needed and later reconcile any excess once insurance or other public assistance funds are received.

Los Angeles Unified recommends an upfront apportionment based on verified quotes, allowing districts to receive full funding at the outset. Since disasters are unplanned events, many districts lack the immediate resources to cover a matching share. Providing 100% of the verified quote upfront ensures districts can address their needs without delay. Once insurance and public assistance funding is secured, a true-up process would reconcile actual expenses, with any excess funds returned to the State.

Additionally, clarification is needed regarding the timing of state and local funds. If immediate access is not available, a clear timeline should be established to ensure school districts can plan accordingly.

In summary, regulatory clarification, eligibility adjustments, and a shift toward upfront funding mechanisms would improve the effectiveness of interim housing assistance, ensuring that schools can respond swiftly to natural disasters while maintaining financial accountability.

Topic #7 – Five-Year Master Plan (Attachment A7)

Master Plan Updates and Timing:

In response to OPSC's request for stakeholder feedback, Los Angeles Unified recommends the following:

- Updates or addendums to a district's master plan should be required no more than once every five years, with the five-year period beginning on the date of the district governing board's approval. The plan's duration should be determined solely based on this approval date.
- Any updates or addendums must receive formal approval from the district's governing board.

Eligibility Determination and Funding Considerations:

Education Code (EC) 17070.54(b) requires that a facilities master plan include information on a district's eligibility for state bond funding. However, clarification is needed regarding the time period this eligibility should represent and whether second-round funding must be included.

To address these concerns, Los Angeles Unified recommends the following:

- Eligibility should be determined within one calendar year of the governing board's approval of the master plan. Second-round funding should be excluded unless its methodology and application are fully finalized.
- Regulations should explicitly state that a master plan's eligibility calculations are based on the original site snapshots used to establish baseline eligibility, rather than the building inventory submitted as part of the master plan.
- Regulations should clarify that if a district uses SAB forms to estimate eligibility, these forms serve solely as a calculation tool and will not be processed as official submissions.

Master Plan and Closeout Audits:

Los Angeles Unified requests clarification on which version of the master plan is required at the time of the closeout audit—whether it should be the version submitted as part of the application or an updated version. Clear guidance on this requirement will help ensure consistency and compliance across districts.

Additionally, we recommend the development of a standardized master plan certification checklist to help districts document key information and certify the plan's completeness. This checklist would provide a clear framework for compliance, streamline the review process, and reduce administrative uncertainties.

Stakeholder Engagement and Master Plan Cost Reimbursement:

Los Angeles Unified recommends that stakeholders be given the opportunity to provide input on the guidelines and standards for school site inventories, which will be discussed between OPSC and CDE. Ensuring stakeholder involvement will help create clear, practical, and equitable standards that reflect the needs of all districts.

Additionally, the cost of developing a facilities master plan has been discussed, with OPSC indicating it may be classified as an operational expense. Los Angeles Unified recommends revisiting this classification to determine whether master plan development qualifies as an eligible expenditure, allowing districts to receive appropriate funding support for this mandated documentation.

"Current" Assessed Value (EC 17070.54(c)(6))

Los Angeles Unified seeks clarification on what qualifies as "current" assessed value and whether entities other than governmental agencies may be considered appropriate for verification purposes.

"Modernization" (EC 17070.54(d))

Los Angeles Unified requests a clear and comprehensive definition of “modernization” beyond what is outlined in EC 17070.15 to ensure consistency in its application.

Year of Construction and Modernization (EC 17070.54(d))

Los Angeles Unified seeks clarification on how the year of construction and modernization should be determined—whether based on the year construction commenced, the year it was completed, or the year DSA plans were approved. Additionally, we request guidance on the appropriate date to use for non-DSA projects if a DSA approval date is recommended for determining the “last modernized” date. Lastly, we recommend that regulations explicitly state that this data will not be used to determine modernization eligibility.

Topic #9 – Energy Efficiency Supplemental Grant (Attachment A9)

Requesting the Supplemental Grant: Options 1 and 2

Under both options presented, OPSC has stated that the DSA Tracker "Type of Program" must match the SFP funding category being requested. However, it remains unclear how DSA and SFP will interpret a district’s application for like-kind replacement when filed under SFP Modernization funding, despite the actual work involving new building construction. Los Angeles Unified requests further clarification on how DSA will evaluate and assign the Title 24 Energy Requirement program in such cases. If DSA’s classification does not align with SFP’s funding definitions, we recommend that this mandate be reconsidered or removed to prevent unnecessary funding complications for districts.

If a tiered approach is selected, the thresholds outlined in OPSC’s Option 1 would need to be revised. The recent revision to EC 17077.35 does not establish a minimum threshold for grant eligibility—it simply requires that the proposed building exceed nonresidential building energy-efficiency standards without specifying by how much. Given this, any tiered approach should align with the intent of the statute and avoid imposing arbitrary thresholds that are not legally required. Additionally, if a tiered approach is implemented, Los Angeles Unified requests calculation examples to clarify how the grant amount would be determined under each tier.

Los Angeles Unified recommends adopting Option 2, as it provides a simplified and streamlined approach. However, there are inconsistencies regarding how DSA would confirm a project exceeds Title 24 energy requirements. OPSC has indicated that the appropriate DSA Project Tracker checkbox would be selected to confirm compliance, but it would not display a percentage. This, in turn, would trigger the need for additional documentation, such as the “DSA Energy Compliance Review Verification Form”, to prove that Title 24 standards were exceeded. If no minimum percentage exceedance is required, then the DSA Project Tracker should not need to display a percentage, nor should additional documentation be necessary. Additionally, if the DSA Energy Compliance Review Verification Form is to be required, it should be made available for review before it is incorporated into the process. Los Angeles Unified recommends addressing and clarifying these points before finalizing the selection and implementation of either option.

Topic #10 – Supplemental Grants for Minimum Essential Facilities (MEF) (Attachment A10)

Los Angeles Unified appreciates the ability to consider multiple funding options for the calculation of the supplemental grant for MEFs. Los Angeles Unified staff has performed an initial analysis based on the proposed options but is not prepared to make a recommendation without additional information from OPSC demonstrating how the calculation examples would compare. Therefore, we request that the next stakeholder materials include examples to facilitate comparison of the different funding options, including Use of Grants, Option 1, and Option 2.

Additionally, while the Use of Grants provision (2 CCR 1859.77.3) specifies that current CBEDS data be used to calculate the pupil amount requested, Los Angeles Unified recommends allowing the option to use a three-year average of CBEDS, similar to the flexibility provided under 2 CCR 1859.82.1 and 1859.82.2.

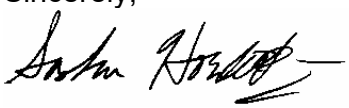
Lastly, we request clarification on the calculation of fundable toilet square footage, specifically whether a site-wide analysis will be conducted to determine if an existing site already meets the required toilet square footage for current enrollment.

Topic #11 – Transitional Kindergarten Classrooms Supplemental Grant (Attachment A11)

Los Angeles Unified appreciates the ability to consider multiple funding options for the calculation of the supplemental grant for Transitional Kindergarten Classrooms. Los Angeles Unified staff has performed an initial analysis based on the proposed options but is not prepared to make a recommendation without additional information from OPSC demonstrating how the calculation examples would compare to one another. Therefore, we request that the next stakeholder materials include examples to facilitate comparison of the different funding options.

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

Sincerely,



Sasha Horwitz
Legislative Advocate
Los Angeles Unified School District

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 #2, Master Plan Requirement

Dear Ms. Kirk,

On behalf of the undersigned school districts and education management organizations, we write to provide comments and recommendations on the implementation of the Master Plan requirement under Proposition 2.

For many school districts, the inclusion of the Master Plan requirement has been the greatest source of uncertainty surrounding Proposition 2. We believe that the Legislature's clear intention behind including the requirement is to provide additional transparency and

accountability to the School Facility Program, and not to create costly and overly burdensome hurdles that could impede access to the program.

The feedback below recognizes that California's 1,000 school districts and their facilities programs are diverse in every sense of the term, from racial and ethnic demographics to geographic region, to socioeconomic needs, to district size, to languages spoken. No one-size-fits-all approach will perfectly address the unique circumstances of every district. However, we believe these principles will enable the greatest number of districts to comply with the letter and spirit of the Master Plan requirement of Proposition 2 in the least disruptive manner.

We recommend that the design of the Master Plan at a minimum address the following principles:

1) **Existing Materials Can Satisfy Master Plan Requirements**

   To the extent practicable, districts should be permitted to satisfy the Master Plan requirement using existing responsible documents without an implied obligation to hire outside architects or consultants to produce new materials. While many districts will not have an existing Master Plan (or comparable project list) that meets all of EC 17070.54's requirements, we recommend that they be able to submit supplementary materials that satisfy the missing Proposition 2 components. Further, we recognize that any included supplemental materials must be approved by the governing board of the district.

2) **Master Plan Verification Form**

   OPSC should provide a Master Plan Verification Form that outlines all the components required by law and provides simple guidance to districts regarding the various methods available to meet the requirements. This document, which could be attached to project applications, will allow districts to certify that their Master Plan includes all the components required by law, and function as a guide to collect/produce the missing components in order to assemble a compliant Master Plan.

   Additionally, we recommend including the school board approval date for the current five-year Master Plan and, the school board approval date for the previously approved five-year Master Plan, if applicable, in the form.

3) **Timeline of Updates to Master Plan**

   Rather than submitting a five-year Master Plan with every application, we recommend that school districts provide the school board approved Master Plan to OPSC no more than once every five years. For individual applications, districts would only need to submit the certified form. OPSC staff could then verify the information using their records. This approach would significantly reduce administrative burdens for both school districts and OPSC.

Because Master Plans are by their very nature snapshots in time, districts must have the flexibility to deviate from the plan as needs evolve. Therefore, we recommend adding language clarifying that OPSC cannot require an updated Master Plan or a supplement to the Master Plan if a district submits a project not included in the approved plan. Similarly, districts must not be restricted to pursuing only projects explicitly listed in the approved Master Plan, ensuring greater flexibility in addressing needs as circumstances arise.

4) Period of Validity of Existing Master Plan

Any Master Plan (five-year or more) that was approved by governing board less than four years ago should be acceptable. Master Plans that were approved more than four years ago also should be acceptable now, but an updated plan should be approved and submitted before the previous plan approval is more than five years old, but no case should any one project be required to submit multiple Master Plans. We recommend that the age of a Master Plan should begin on the date of a district's governing board approval.

5) Eligible Operational Expenditures

Any costs associated with creating a Master Plan or supplementary components of the plan should be eligible as a state bond fundable expenses. This is especially important for smaller districts that lack the capacity or funding to develop a compliant Master Plan with existing resources. Additional clarity will be needed detailing how a district will be able to apply for these costs.

Thank you for the opportunity to provide our perspectives on the structure of the Proposition 2 Master Plan requirement. Together, these recommendations will provide necessary clarity and to the field. We look forward to ongoing stakeholder discussions as the design is further refined.

Sincerely,

Yuri Calderon
Executive Director
Small School Districts' Association

Sasha Horwitz
Legislative Advocate
Los Angeles Unified School District



Dr. Sierra Cook
Director of Government Relations
San Diego Unified School District



Lucy Salcido Carter, MA, JD
Director of Policy and Governance
Office of the Superintendent
Alameda County Office of Education



Mishaal Gill
Director of Policy and Advocacy
California Association of School
Business Officials



Rebekah Kalleen
Legislative Advocate
Coalition for Adequate School Housing



Carlos Rojas
Chief Governmental Relations Officer
Governmental Relations
Kern County Superintendent of Schools



Jeffrey A. Vaca
Chief Governmental Relations Officer
Office of the Riverside County
Superintendent of Schools



Dorothy Johnson
Legislative Advocate
Association of California School
Administrators

February 28, 2025

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

Re: Proposition 2: SSDA Comments on Facilities Master Plan

Dear Ms. Kirk,

On behalf of the **Small School Districts' Association (SSDA),** representing over 600 small and rural school districts throughout California, I want to express sincere gratitude for the opportunity to provide input and participate in the stakeholder sessions regarding the implementation of **Proposition 2**. We recognize the monumental task OPSC faces in balancing many diverse district needs while ensuring fair and equitable access to state funding while striving to create a framework that serves the best interests of students across California. Your commitment to engaging with stakeholders and seeking feedback is greatly appreciated, and we commend the agency's efforts to develop thoughtful and effective regulations.

As we continue working together over the next several months, SSDA remains committed to ensuring that the regulations crafted under Proposition 2 equitably address the needs of small and rural school districts. To that end, we would like to offer specific comments regarding the **Five-Year School Facilities Master Plan** and other critical components under discussion. These comments are specific to the second stakeholder meeting and are additive to those comments that I included in the chat during the session.

The Five-Year School Facilities Master Plan: A Barrier for Small and Rural Districts

While SSDA understands that **a Facilities Master Plan** is a requirement under Proposition 2, we strongly urge modifications to ensure that small and rural school districts are not unfairly burdened.

For small and rural districts, the current master planning model is unnecessarily complex, costly, and administratively burdensome. Most of these districts are not anticipating or planning for significant growth or large-scale expansion projects; instead, they are focused on **maintaining and modernizing their existing facilities**.

Unlike their larger counterparts, most small and rural school districts operate with a single administrator responsible for all district operations—including facilities. They already have

a clear understanding of their facilities' needs without the need for a lengthy, consultant-driven master plan. Requiring them to produce a five-year plan designed for large, urban districts will only serve as a barrier to accessing state bond funds, which is counterproductive to Proposition 2's purpose.

The Consultant Accessibility Problem

Compounding this issue is the **difficulty in securing consultant support** for small and rural school districts. The firms that typically assist school districts with facilities master planning and state funding applications are less inclined to take on small projects, as these projects are often:

- **Smaller in scope and budget**, making them less financially attractive.
- **Located in remote rural areas**, which are costly and time-consuming for consultants to travel to.
- **Time-intensive for minimal return**, particularly when compared to large-scale urban projects.

As a result, **small and rural LEAs are left with little to no external support**, forcing already short-staffed districts to navigate a highly technical planning and application process alone. Without outside consultants willing to assist, many districts will struggle to complete the required Facilities Master Plan, effectively shutting them out of Proposition 2 funding opportunities.

Recommendation: Advance Funding for Master Plan Development

To prevent the Facilities Master Plan requirement from becoming a financial barrier, SSDA recommends that OPSC provide advance funding to any school district under 2,500 ADA to conduct the required master plan.

- **Small districts should not have to front the cost** of creating a state-mandated plan that is a prerequisite for accessing facilities funding. Most small and rural school districts would be taking money from their general fund used primarily for their educational program to fund the facilities master plan study.
- **Many small and rural districts lack general fund reserves** to cover consultant fees or staff time needed to draft the plan.
- **Advance funding ensures equity**, allowing all districts—regardless of size or financial capacity—to participate in Proposition 2 programs.

Without this upfront funding mechanism, the requirement will effectively exclude many of California's smallest districts from accessing the facilities funding they need.

A Practical and Streamlined Facilities Master Plan for Small and Rural Districts

To ensure that Proposition 2 does not become an unintended obstacle, SSDA proposes a streamlined approach to the Facilities Master Plan that relies heavily on documentation that has already been developed and meets the intent of the law while remaining practical and feasible for small school districts.

The plan should begin with an **Executive Summary** that outlines the district's primary facility-related goals, whether it be ensuring safety, maintaining functionality, or addressing critical repairs. This section should include a brief district snapshot summarizing the number of schools, student enrollment, and unique challenges such as geographic isolation or fluctuating enrollment. Many Districts have used this type of language in their LCAP or SARC documentation. Additionally, a basic enrollment projection should be provided, reflecting a simple five-year trend rather than requiring complex forecasting. Finally, the summary should include a practical planning timeline that spans five years, with the flexibility to adjust as conditions change. The plan should be revisited no more frequent than every five years.

A **Needs and Conditions Assessment** should follow, documenting the current state of school facilities. Instead of requiring expensive third-party evaluations, this section should be based on the District's Facilities Inspection Tool ("FIT") tool and a simple walkthrough conducted by district leadership and maintenance staff. It should note the same essential information found in the FIT, such as roof conditions, HVAC systems, plumbing, and other infrastructure concerns. The focus should remain on immediate and high-priority repairs, ensuring that urgent health and safety needs are addressed first. Cost estimates should be based on local maintenance staff expertise or informal contractor input, reducing the need for external consultants.

The plan should also include a **Space Utilization and Flexibility Review**, allowing districts to describe how they are using their current facilities and whether existing spaces could be repurposed. Since small and rural districts typically do not anticipate significant expansion, this section should focus on maximizing the use of current classrooms, multipurpose spaces, and other facilities rather than long-term growth strategies. Any potential adjustments, such as minor facility modifications or the use of portable buildings, should be noted without requiring extensive redevelopment plans.

Funding and Resource Planning should be a straightforward section identifying available and anticipated funding sources for facility improvements. Given that small districts primarily focus on maintenance rather than large-scale development, this section should emphasize cost-effective solutions, such as upgrading existing infrastructure with energy-efficient materials or leveraging grants for critical repairs. Instead of requiring long-term

capital expenditure projections, the plan should outline realistic, near-term funding strategies that align with state bond funding and local revenue sources.

Finally, a **Community Engagement and Oversight** section should ensure transparency and local involvement in facility planning. The plan should describe how the school board and community are kept informed of facilities priorities, whether through board meetings, community forums, or informal discussions. This section should also clarify that facility planning remains a dynamic process, allowing for adjustments as needed while maintaining the overall five-year framework.

Key Implementation Considerations

1. **What duration of the five-year plan should remain to be acceptable?**
    - SSDA recommends that the master plan be updated once every five years—no more, no less. The Plan should be a discretionary tool for the district's governing board and should not have to be revised or updated outside of that timeframe. The plan, once approved, should be valid for a full five-year period regardless of when a grant application is submitted.
2. **Is the remaining duration based on the application received date, OPSC processing date, or Board funding date?**
    - The application received date should not be used as the reference point for determining a plan's validity. Given the long timelines in state approvals, using the Board funding date could force districts to revise plans unnecessarily before receiving funding. Small and rural school districts should not be required to review or revise a plan within the five-year period beginning with the date the plan was adopted by the LEA's governing board.
3. **When must updated plans be submitted?**
    - Small and rural districts should only be required to update their Facilities Master Plan once every five years. The Facilities Master Plan should be considered a discretionary document adopted by a governing board of directors of the school district and should not be subject to any requirements for updating. Districts should not be required to submit updates simply because they are applying for a grant during an existing plan's lifecycle.

Final Recommendation

SSDA urges OPSC to:

1. In addition to allowing the cost of the Facilities Master Plan to be included as an allowable project cost, **OPSC should advance funding for any school district under 2,500 ADA** to develop a Facilities Master Plan, ensuring that no district is shut out of funding due to financial constraints.
2. **Adopt a simplified, right-sized Facilities Master Plan model** that is **practical, cost-effective, and minimizes unnecessary burdens** on small districts.
3. **Ensure that master plans are only updated once every five years, without OPSC authority to require additional revisions**.

We appreciate the opportunity to submit these comments and look forward to working together to ensure that Proposition 2 truly benefits all students across California—without creating unnecessary roadblocks for small and rural communities.

Please contact me, or our legislative advocate, Cathy McBride (cathy@capitoladvisors.org), if we can provide any additional information.

Sincerely,



Yuri Calderon
Executive Director
Small School Districts' Association (SSDA)
Yuri@ssda.org

February 28, 2025

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

RE: FEEDBACK ON TOPICS PRESENTED DURING FEBRUARY 13, 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 second Proposition 2 Implementation meeting held on February 13, 2025. Below is a summary of our comments and concerns:

- **Topic 6 – Interim Housing and Natural Disaster Assistance**
  - We appreciate OPSC recognizing that the costs for interim housing assistance reimbursement may create barriers for some school districts. Is it possible to create a standard classroom-based emergency interim housing grant, similar to a design grant or a preliminary grant, that could be adjusted for a construction or "final" apportionment after additional information is provided and other government or insurance assistance is considered?

- **Topic 7 – Five-Year Master Plan**
  - We encourage OPSC to reconsider the costs of developing a facility master plan (FMP) as an eligible project expenditure. The costs to prepare a master plan range from tens of thousands of dollars to several hundreds of thousands of dollars. There does not appear to be a mechanism to provide funding for the preparation of an FMP, so to also disallow the expense as an allowable project expenditure creates an even larger hurdle for school districts and could be characterized as an unfunded mandate for participation in the School Facility Program (SFP).
  - We encourage OPSC to consider allowing an FMP to be valid for a full five years after school district board approval and then allowing 5-year updates to the FMP thereafter. A well-developed FMP can take anywhere from a few months up to a year (or beyond) for a district to prepare, and often includes significant community and stakeholder input, so requiring a school district to update the FMP annually is overly burdensome and unnecessary. Furthermore, small school districts are less likely to have the funding, staff or resources necessary to prepare annual updates, which will likely limit their ability to participate in the SFP if this becomes a requirement.

- **Topic 8 – Small Size School District Program**
  - We request that OPSC provide clarification on how pupils are to be counted for the Small Size School District program, within the *Enrollment Certification/ Projection* (SAB Form 50-01) instructions. The instructions seem to have conflicting direction on when to include enrollment if students are both "receiving non-classroom-based instruction" and "attending independent study". Many (or most) independent study programs do not have students attending physical classrooms 100 percent of the school day, and are considered "non-classroom-based", however they do still have the need for a certain number of classrooms.
  - For certain small-to-medium sized districts, including the below charter school students may mean the difference between being above or below the 2,500 pupil cut-off to be a small school district:

    SAB Form 50-01 instructions – Include: "Students receiving Classroom-Based Instruction in Charter Schools located within the district boundaries and are enrolled in the same grade levels or type served by the district regardless if the district chartered the school."

    This may be a rare occurrence, but it would be unfortunate if a district was not able to participate in the program due to a factor that is largely out of their control.

- **Topic 9 – Energy Efficiency Supplemental Grant**
  - No comments

- **Topic 10 – Supplemental Grants for Minimum Essential Facilities**
  - No comments

- **Topic 11 – Transitional Kindergarten (TK) Supplemental Grant**
  - We request that districts be able to utilize contracts signed *prior to* July 3, 2024 to justify projects under this program. This program is essentially taking the place of the CA Preschool, Transitional Kindergarten, Full Day Kindergarten Facilities Grant Program (CAPSTKFDKFGP), with the same intent, and we believe that districts who anticipated being able to participate in the CAPSTKFDKFGP should not be excluded from requesting the TK supplemental grant.

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

Sincerely,

Jessica Love
Hancock Park & DeLong

Fresno County Office of Education Questions – 5 Year Master Plan

Master Plans

1. Will OPSC be providing some kind of financial assistance to small school Districts to be able to go to an architect and get the facility master plan created?
2. Will the master plan be more basic? If we are able to show that we put work into it and compiled the necessary documents, will that be sufficient as it was in the past? Or will it be stricter and have more specific requirements for how it is organized and put together?
3. Because there are 5 years of district information required, who will be watching for when it is submitted? Will OPSC be reaching out to tell the district when they should start it and how current does the information have to be? If the application was submitted in the past, when does the 5 years actually start?
4. Is there a template for a facility master plan yet?
5. How will COE owned SDC classrooms on district campuses be handled when creating the facility master plan?

OFFICE OF PUBLIC SCHOOL CONSTRUCTION
STAKEHOLDER MEETING
April 10, 2025

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

PURPOSE

To continue discussion from the February 13, 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.

BACKGROUND

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

In summary, Proposition 2 requires the following:

- School districts to include specified minimum elements as part of the required five-year school facilities master plan, including an inventory of existing facilities, sites, and property.
- The Office of Public School Construction (OPSC) to develop guidelines, in consultation with the California Department of Education (CDE), that school districts may use to guide the development of the school facilities master plan.
- OPSC to 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) to 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 to 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.

Before and after the passage of Proposition 2, OPSC continued to accept SFP applications on a flow basis. To acknowledge the statutory requirements for the Master Plan and to allow continued acceptance of applications, the State Allocation Board (Board) adopted the timelines and policy listed below on December 3, 2024. This policy is intended to ensure that program applicants are aware of their future obligation to comply with the new statute. Therefore, pending the effective date of the program regulations for

BACKGROUND (cont.)

the Master Plan, applications submitted to OPSC on or after October 31, 2024, must conform to the following:

- All districts must submit a governing board resolution acknowledging the submittal timeline requirements for the type of application submitted, and acknowledging that the project may be rescinded for failure to submit with the required components.
- Facility Hardship and Seismic Mitigation Program projects must submit the Master Plan with the substantial progress certification for construction of the project or the 100 percent complete *Expenditure Report* (Form SAB 50-06), whichever occurs first following the approval of the regulations.
- New Construction and Modernization applications received October 31, 2024, through 12 months following the Office of Administrative Law's (OAL) approval of regulations must submit the Master Plan at time of processing.
- New Construction and Modernization applications received more than 12 months following OAL approval of regulations must submit the Master Plan with the application.

A sample resolution is available on the OPSC website under Resources/School Facility Master Plans and is linked here: School Facility Master Plans.

STAFF ANALYSIS/DISCUSSION

At the February 13, 2025 meeting, OPSC prepared a report that provided an overview of the new and amended statutory requirements regarding the SFP Master Plan codified in EC Section 17070.54. This report is a follow up to the first meeting on this topic and will focus on responding to the feedback OPSC received either during or after that meeting.

First and foremost, OPSC thanks everyone that was able to view, attend, or participate in this meeting. OPSC also thanks you for the thoughtful and thorough feedback that was submitted. While the chart that follows contains only comments received during or after the February 13, 2025 meeting and OPSC's responses to those comments, the entire topic is still open for any feedback, not just the points raised in the comments below. Please refer to the February 13, 2025, item for the full list of OPSC's suggestions related to the Master Plan.

STAFF ANALYSIS/DISCUSSION (cont.)

Stakeholder Feedback	OPSC Response
1. What will be the process of intake/review/approval of a Facilities Master Plan? Will the plan be evaluated at application intake before being officially received, or do the plans need to be approved by OPSC or another agency such as CDE prior to application submittal?	**1.** When the district's Master Plan is submitted to OPSC, the intake review process will just be to confirm that the Master Plan has been submitted with all the necessary documents in support of the plan, as outlined in EC Section 17070.54(c). Once the application package is confirmed to have all required components, including all components of the Master Plan, the application package will be given a received date. After being given a received date, a second team will then review the Master Plan documents more deeply to validate that documents submitted contain all of the components required by EC Section 17070.54 and will work with the district to obtain any missing elements or clarifications that are needed. If the district cannot complete this process in a timely fashion, the application will be returned, and the district can reapply when it has the missing elements prepared. It is not necessary for OPSC, CDE, or any other agency to review the plan before submittal to OPSC.
2. How does OPSC determine that a Master Plan is for "five years?" What if the plan does not specify length to completion? Many school districts prepare plans of long term needs well beyond five years.	**2.** EC Section 17070.54(a) states that the school district shall submit a "five-year school facilities master plan, or updated five-year school facilities maser plan" as a condition of participation in the SFP. Based on feedback received at the February 13, 2025 meeting, including this comment, OPSC recognizes that many districts implement plans with terms longer than just five years. OPSC recommends the following in response to these comments: • When a Master Plan is submitted

STAFF ANALYSIS/DISCUSSION (cont.)

Stakeholder Feedback	OPSC Response
	2. (cont.) with a funding application, the plan must have at least four years remaining on the term of the plan, based on the date the plan was approved by the school board. For school districts that are very active in the SFP and submit applications several times per year, this means that, at most, those districts must only update their plan annually. For districts that only submit applications every few years, for example, they would need to update their plans prior to submittal of their next application. • OPSC also recommends that, at minimum, each district would readopt or certify that plans longer than five years in duration have at least four years remaining on the term of the plan, based on the date the plan was approved by the school board. This approach is proposed to meet the requirements in EC Section 17070.54 and for consistency with the approach mentioned above. • OPSC will accept Master Plans that have only made amendments to a previous plan, so long as the amended plan meets all of the requirements outlined in EC Section 17070.54 and the district submits both the previous plan and the amendments. • For plans that exceed five years in duration, OPSC recommends that to comply with the statutory requirement to have a five-year plan, the applicant clarifies which of the components of the plan are for the next five years and which components of the plan are longer term, and/or the plan should be detailed enough that it outlines goals over the course of the term of the agreement, which would inherently illustrate which goals are within the

STAFF ANALYSIS/DISCUSSION (cont.)

Stakeholder Feedback	OPSC Response
	2. (cont.) next five years. • Additionally, EC Section 17070.54(c)(3) requires the Master Plan to include a projection of enrollment growth over the following five years, which would also tie into the relevance for highlighting or clarifying which aspects of the plan are to occur over the next five years, versus longer than five years into the future. • Additionally, one stakeholder response mentions that because the objective is to ensure the Master Plan represents a current and effective planning tool, it makes sense that districts should submit updates or addendums when the Master Plan undergoes a significant and substantial modification. OPSC agrees with this, and proposes a requirement to update the Master Plan to be current if any changes have taken place, or certify that no significant changes have occurred and that the previously submitted Master Plan still meets all statutory and regulatory requirements, whenever a new application is submitted.
3. Can the Master Plan be for a select number of schools that are pursuing funding?	**3.** OPSC interprets EC Section 17070.54 as requiring a comprehensive, districtwide scope for the Master Plan. This is reinforced in several of the outlined requirements, such as the examination of the district's enrollment growth, assessed value, deferred maintenance plan, as well as the requirement to complete a site-by-site inventory of "every school in the district" in EC Section 17070.54(d).
4. Is the cost to develop the Master Plan an eligible SFP expenditure?	**4.** Generally speaking, the SFP considers the costs to develop Master Plans as an operational expense and the EC sections that define eligible uses of new construction and modernization funds do not include

STAFF ANALYSIS/DISCUSSION (cont.)

Stakeholder Feedback	OPSC Response
	4. (cont.) operational expenses as eligible expenditures. However, the costs necessary to develop a Master Plan can be an eligible expenditure specifically for small school district projects receiving the Project and Construction Management grant that is part of the newly enacted Small Size School District Program established in EC Sections 17078.35, 17078.36, 17078.37, and 17078.38. EC Section 17078.35(d) specifies that the new Project and Construction Management grant is available for small school districts to obtain services that, in part, assist with project planning. SFP expenditures eligible for development of a Master Plan are limited to the state and local matching share of the Project and Construction Management grant.
5. There were several questions, or statements, related to OPSC creating a template for Master Plans. Additionally, OPSC received a request to develop a form that outlines all Master Plan components required by law and provides simple guidance to applicants regarding the methods available to meet the requirements. It was suggested that this form would then be used by school districts to sign and certify they meet the requirements in EC Section 17070.54.	**5.** OPSC plans to create resources such as a checklist aimed at helping districts to create Master Plans, which will be made available through OPSC's website and/or in the OPSC Online Database. Currently, CDE has a resource website that provides guidelines for development of long-range facilities plans. CDE intends to update this website to support the requirements in EC Section 17070.54. As required in statute, OPSC will develop guidelines, in consultation with CDE, that school districts may use to guide the development of the Master Plan required as a condition of participating in the SFP. OPSC notes that EC Section 17070.54 expressly requires submittal of the Master Plan as a condition of SFP participation. Therefore, self-certification alone will not satisfy the statutory requirements.
6. Does the Master Plan have to be updated if the project the plan is being submitted with was originally included in the plan, but is now complete and the district is seeking reimbursement?	**6.** Yes, submittal of a Master Plan, or updated Master Plan, is a condition of participation in the SFP, and the Master Plan is not limited to the project being submitted. Rather, it is a comprehensive five-year plan

STAFF ANALYSIS/DISCUSSION (cont.)

Stakeholder Feedback	OPSC Response
	6. (cont.) for the entire district projecting into the future.
7. Will the project list and capital planning budget be analyzed to the degree that it will be reconciled by OPSC with projects on submitted applications?	**7.** No, the Master Plan is a planning document for school districts. OPSC is only verifying that the required documents and elements have been included and that the level of detail is sufficient to meet the statutory requirements.
8. Will OPSC perform any form of review other than simply confirming that the requirements have been met? If so, what type of review will be conducted?	**8.** Currently OPSC's proposal is to review each submittal for compliance with the required components of the Master Plan as outlined in EC Section 17070.54. If any of those components are missing, OPSC will work with the district to obtain the missing documents or request the Master Plan be updated.
9. The process for updating plans should be flexible and uncomplicated. Districts should not have to reinvent the wheel. Supplements and addendums to existing documents should be the approved method.	**9.** OPSC agrees with this comment, and agrees to accept supplements, addenda, or updates to already existing, or previously submitted, Master Plans so long as the updates reflect a current five-year plan for the district and all components required by EC Section 17070.54 are included and have local school board approval. When submitting supplements, addenda, or updates, districts must also include a copy of the Master Plan that has been amended.
10. Feedback was received from several sources that indicated support for inclusion of an understanding of climate impacts such as extreme heat and flooding in district Master Plans. Other elements suggested for inclusion in submitted Master Plans were prioritization of green schoolyards, outdoor learning spaces, and climate adaptation. It was also suggested that OPSC provide guidance on climate resilience, eliminating barriers and catalyzing natural greening at schools, and obtaining information on making investments to create healthy climate-resilient school buildings.	**10.** OPSC's core responsibility is to ensure that the Master Plans are submitted in accordance with EC Section 17070.54. OPSC recognizes that climate-related goals are laudable, and related expenditures are normally eligible uses of SFP funds. Additionally, Proposition 2 establishes a new energy efficiency supplemental grant that can help further these objectives. As required in statute, OPSC will develop guidelines, in consultation with CDE, that school districts may use to guide the development of the Master Plan required as a condition of participating in the SFP. OPSC and CDE intend to include information regarding climate resilience as a component

STAFF ANALYSIS/DISCUSSION (cont.)

Stakeholder Feedback	OPSC Response
	10. (cont.) of these guidelines for districts' consideration in developing their Master Plans.
11. Districts should be permitted to use existing documentation, along with supplemental documentation as needed, to satisfy the requirements for the components of a Master Plan submittal as outline in EC Section 17070.54.	**11.** OPSC intends to provide flexibility to allow school districts to develop the Master Plan in a method that suits their purposes beyond the SFP submittal requirements, as long as each of the components of the Master Plan required by EC Section 17070.54 is included in the submittal.

Other Topics Requiring Discussion and Feedback

In addition to the stakeholder feedback mentioned above, the issues below need further development, and OPSC seeks feedback on these topics.

Remaining Duration of Existing Master Plans
As discussed above, OPSC proposes that the duration of any submitted Master Plan has at least four years remaining. As a result, an updated Master Plan, or acknowledgement the plan is still valid and meets all statutory and regulatory requirements for at least four more years, would be required with each application submittal. OPSC's intent with this proposal is to ensure the Master Plan information is up to date and pertinent, without necessarily requiring a new Master Plan with each submittal. Districts that are less active in the program and do not submit new projects every year would only be required to submit a Master Plan upon participation in the SFP. OPSC proposes that the date the most recent Master Plan was adopted by the applicant's governing board be used as the date from which to measure when a new, or updated Master Plan should be 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, 2027.

Inventory of Existing Facilities and Sites
When this topic was discussed at the February 13, 2025 meeting, OPSC sought feedback on how leveraging existing documentation could be used to help fulfill this aspect of the Master Plan requirements. Many of the forms used to establish and/or adjust eligibility for either new construction or modernization 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 applicant 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 used to amend the information to be current.

STAFF ANALYSIS/DISCUSSION (cont.)

Enrollment Projection
Another requirement of the Master Plan that could leverage the information already entered into existing forms, is the requirement to project enrollment growth over the five years after the Master Plan submittal. The *Enrollment Certification/Projection* (Form SAB 50-01) can be used for this purpose in part or in whole depending on if 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. OPSC's website also currently features an enrollment calculator to assist districts in determining projected enrollment.

Capital Planning Budget Requirements and Deliverables
At the February 13, 2025 meeting, OPSC identified the capital planning budget required in EC Section 17070.54(c)(4) and to date, OPSC has not received comments or suggestions on the format of this required Master Plan component. To fulfill this requirement, OPSC proposes that applicants submit a narrative that outlines the anticipated budget and expenditure needs to complete the projects intended within the next five years that are included in the plan.

OPSC welcomes further feedback on these topics.

AUTHORITY

Education Code 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.
(B) A library.

AUTHORITY (cont.)

(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.)

School Facility Program Regulations References

Laws and Regulations can be accessed here: Laws, Regulations for School Construction Projects
School Facility Program Forms can be accessed here: Forms

CALIFORNIA'S COALITION for ADEQUATE SCHOOL HOUSING℠

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April 24, 2025

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

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

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

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

Duration of a Master Plan

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

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

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

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

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

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

Sincerely,

Rebekah Kalleen

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

CLEAN AIR
Allies

Via Email

April 25, 2025

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

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

Dear Communications Team,

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

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

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

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

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

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

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

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

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

b. Support from Other States.[2]

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

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

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

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

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

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

> An inventory is a reliable count of each of the school district's facilities and should contain basic information on (1) the facility's condition, and (2) the various building components and equipment and basic information of their condition. Information in the inventory should include, but not be limited to, the following:
>
> • A count of each facility, its age, square footage, and a basic building history describing any upgrades, major repairs, renovations, and/or additions.
> • For each facility, a listing of the building components, their condition and functional performance, as well as the equipment's age, usage, location, warranty information, and model type.

(MSBA, "Maintenance and Capital Planning Best Practices," Apr. 25, 2011, 3.)

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

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

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

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

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

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

c. Support from Existing California School District FMPs.

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

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

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

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

Very truly yours,



JuNelle Harris
Co-Founder
Clean Air Allies

CENTER FOR CITIES+SCHOOLS
UNIVERSITY OF CALIFORNIA BERKELEY

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

Dear members of the OPSC Proposition 2 implementation team:

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

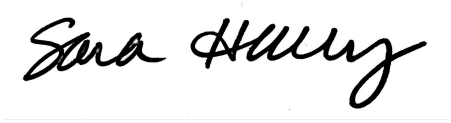
Additionally, we hope that the inventory submission in particular is structured in such a way that the data can be integrated into a statewide repository that can serve as a pilot for building a comprehensive dataset on California's schools, their ages, size, adequacy, and potential capital needs.

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

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

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

Sincerely,



Sara Hinkley, California Program Manager
hinkley@berkeley.edu

Alberto M. Carvalho
Superintendent

Los Angeles Unified School District
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Board of Education
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Sherlett Hendy Newbill
Nick Melvoin
Karla Griego
Kelly Gonez
Tanya Ortiz Franklin

April 25, 2025

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

Re: Proposition 2 Implementation Stakeholder Meeting #8

Dear Ms. Kirk,

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

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

Interim Housing and Natural Disaster Assistance

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

Five-Year Master Plan

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

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

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

Sincerely,



Sasha Horwitz
Legislative Advocate
Los Angeles Unified School District

April 25, 2025

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

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

To Whom it May Concern:

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

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

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

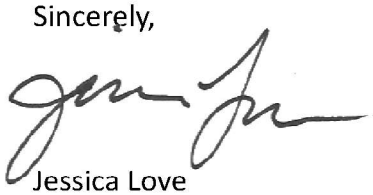
    It is a general and long-standing capital planning practice to develop long-term facilities master plans because those master plans require several years to be implemented and realized. Consider, for example, the five-year enrollment projections that inform new construction

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

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

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

Sincerely,



Jessica Love
Hancock Park & DeLong

May 16, 2025

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

Rebecca Kirk
Office of Public School Construction
707 Third Street, Fourth Floor
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Ida Clair
Division of the State Architect
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Sacramento, CA 95811

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

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

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

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

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

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

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

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

- **Issue joint guidance on eligible climate-resilient investments.** Clarify how schools can use Proposition 2 funds for projects that align with state climate goals, such as HVAC upgrades, solar and battery storage, electrification, shade structures, schoolyard forests and green schoolyards. Provide guidance on how districts can leverage complementary funding sources such as federal energy tax credits and CalSHAPE.

- **Provide technical assistance and model resources to districts to help incorporate climate resilient practices in their FMP and facilities projects.** Develop and share best practices, example FMP language, and planning tools that help districts incorporate climate-resilient strategies, and coordinate across CDE, DSA and OPSC, to reduce confusion and streamline support for local education agencies.

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

Sincerely,

Below signed members of the Climate Ready Schools Coalition:

Andra Yeghoian
CIO
Ten Strands
Co-Lead
Climate Ready Schools Coalition

Jonathan Klein
Co-Founder and CEO
UndauntedK12
Co-Lead
Climate Ready Schools Coalition

Sara Hinkley
California Program Manager
Center for Cities + Schools

Sarah Matsumoto
Director of Policy
Green Schoolyards America

JuNelle Harris
Co-Founder
California Alliance for Clean Air in Schools

Mary Hillemeier
Policy Associate
TreePeople

Shereen Walter
President
California State PTA

Alexa Norstad
Executive Director
Center for Ecoliteracy

Mitch Steiger
Legislative Representative
California Federation of Teachers

Julia Sebastian
Climate Policy Director
Jobs with Justice San Francisco

Serena Pelka
Policy Advocate
Climate Action Campaign

Mary Ruppenthal
Education Market Sector Leader
HED

Vanessa Forsythe
Leadership Council Member
California Nurses for Environmental Health & Justice

Vanessa Aramayo
CEO & President
Alliance for a Better Community

Alvin Lee
Executive Director
GENup (Generation Up)

Reilly Loveland
Associate Director
New Buildings Institute

Richard Burke
Chapter Leader
Elders Climate Action Southern California

Janet Perlman MD MPH
Physician
(Individual)

Proposition 2 Implementation Guidance from Climate Ready Schools Coalition Partners

Spring 2025



Ten Strands
Connecting Education, Environment, and Community

UNDAUNTED K12

Green Schoolyards America

CENTER FOR CITIES+SCHOOLS
UNIVERSITY OF CALIFORNIA BERKELEY

California Alliance for CLEAN AIR in Schools

TreePeople

Purpose and Overview

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

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

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

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

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

I. Executive Summary

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

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

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

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

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

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

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

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

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

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

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

III. Climate Ready Facilities Issues Considerations and Guidance

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

ISSUE 2: Indoor Environmental Quality (Including Temperature)

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

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

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

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

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

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

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

C) What Proposition 2 authorizes for indoor environmental quality

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

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

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

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

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

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

ISSUE 3: Schoolyard Greening

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

A) Why schoolyard greening matters in a changing climate

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

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

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

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

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

B) What the law already recommends for schoolyard greening

In 2002, California adopted an Extreme Heat Action Plan[1], outlining a strategic and comprehensive set of state actions to adapt and strengthen resilience to extreme heat.

Areas of near-term focus include the following efforts:

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

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

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

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

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

[1] California Natural Resources Agency, “Protecting Californians From Extreme Heat: A State Action Plan to Build Community Resilience,” April 2022. https://resources.ca.gov/-/media/CNRA-Website/Files/Initiatives/Climate-Resilience/2022-Final-Extreme-Heat-Action-Plan.pdf.

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

C) What Proposition 2 authorizes for schoolyard greening

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

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

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

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

Example recommendations include the following:

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

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

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

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

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

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

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

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

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

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

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

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

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

C) What Proposition 2 authorizes for climate risk assessments

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

D) Recommendations for including climate risk assessments in state guidance

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

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

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

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

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

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

CALIFORNIA'S COALITION for ADEQUATE SCHOOL HOUSING℠

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May 23, 2025

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

Subject: Proposition 2 Stakeholder Comments – Various Items

Dear Ms. Kirk:

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

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

Proposed Regulatory Amendments for General Updates: Increases to Pupil Grants

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

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

Five-Year Master Plan: Deferred Maintenance Plan Verification

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

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

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

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

Sincerely,

Rebekah Kalleen
CASH Legislative Advocate

Ian Padilla
CASH Legislative Advocate

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

Children Now

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June 16, 2025

Juan Mireles
California Department of Education
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Rebecca Kirk
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Ida Clair
Division of the State Architect
1102 Q Street, Suite 5100
Sacramento, CA 95811

Re: Proposition 2 Guidance and Considerations for Implementation

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

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

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

> SEC. 5., Section 17070.54 (c) of California Education Code states "**The school facilities master plan shall include, but is not limited to, all of the following information:**
>
> (*1) An inventory of existing facilities, sites, and property pursuant to subdivision (d).*
> *(2) Existing classroom capacity, as determined pursuant to Sections 17071.10 and 17071.25.*
> *(3) Projected enrollment growth for the applicable school district over the next five years, accounting for growth pursuant to Sections 17071.75 and 17071.76.*
> *(4) A capital planning budget outlining the applicable school district's projects.*
> *(5) The financing and other funding sources that would be used to support the acquisition of the applicable schoolsite, new construction project, modernization project, and lead testing and remediation projects.*
> *(6) Verification of the applicable school district's current assessed value from the appropriate local government entity that collects and maintains this information.*
> *(7) The school district's deferred maintenance plan certified pursuant to Section 17070.75.*
> *(8) A narrative describing how the school facilities master plan is consistent with the goals, actions, and services identified in the school district's local control and accountability plan for the first state priority, as described in paragraph (1) of subdivision (d) of Section 52060, as it relates to school facilities.*

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

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

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

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

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

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

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

Sincerely,

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

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

OFFICE OF PUBLIC SCHOOL CONSTRUCTION
STAKEHOLDER MEETING
August 28, 2025

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

PURPOSE

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

AUTHORITY

See Attachment A7a.

DESCRIPTION

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

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

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

BACKGROUND

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

BACKGROUND (cont.)

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

STAFF ANALYSIS/DISCUSSION

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

Summary of Stakeholder Feedback

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

Stakeholder Feedback	**OPSC Response**
1. Several stakeholders commented on the proposed requirement that there must be at least four years remaining on the Master Plan term at the time of application submittal, and that districts must update their Master Plans when submitting new applications if there are fewer than four years remaining. Several stakeholders requested that OPSC reconsider this requirement and expressed concerns. Several stakeholders opined that this requirement to effectively update the five-year Master Plan annually is not supported by the statute. Additionally, stakeholders cited potential negative impacts on districts, including: • The five-year plan would only be valid for one year, which is contrary to how districts undertake long-term planning, which can take several years to finalize. • It would generate additional expense and administrative burden.	**1**. OPSC acknowledges and appreciates stakeholders' feedback on this proposed requirement and the alternative recommendations stakeholders provided. Upon further consideration and review of stakeholder input, OPSC has provided an updated proposal in this item that is intended to provide flexibility to School Districts by ensuring there a period of up to five years during which School Districts may submit a single or multiple applications following submittal of a complete, valid Master Plan. If a district elects to participate in the SFP more than once during this five-year period, the district would only be required to update the Master Plan during this period if there are changes that materially affect components of the Master Plan that are required by statute.

STAFF ANALYSIS/DISCUSSION (cont.)

Stakeholder Feedback	OPSC Response
1. (cont.) • It would create a hurdle to participation in the SFP, especially for small School Districts. • Because districts must already update eligibility applications, the proposed process would be duplicative. One stakeholder recommended that a Five-Year Master Plan be considered valid for five years from local governing board approval, and districts should not be required to submit a new or updated Master Plan for a specific application if the five-year term expires after the application was submitted to OPSC.	**1. (cont.)** Updates to the valid Master Plan within the five-year period following local governing board approval would be dependent on the individual district's self-certification of whether a material change has occurred to statutorily required components of the Master Plan, and frequency of participation in the SFP. For additional flexibility in this case, OPSC proposes that districts could provide a local governing board resolution with information on the material updates, in lieu of submitting an amended Master Plan. OPSC agrees that the statute requires submittal of a five-year master plan as a condition of participation in the SFP and that statute does not specify the time period for the five-year span. However, the statute also refers to an *updated plan*. Additionally, EC Section 17070.54(f) requires a district to "update its school facilities master plan to reflect any changes in enrollment, capacity, or other areas, as appropriate for purposes of participating in the school facilities program." The revised proposal presented in this item is intended to align with these statutory requirements while minimizing potential impacts to districts if there have not been material changes to statutorily required components of the Master Plan within a five-year period.
2. In summary, the stakeholder states that it intends to publish a comprehensive guide to best practices in facilities master planning and has recommendations on additional components of the Master Plan that should be required. For example, the stakeholder recommends that a facilities assessment,	**2.** OPSC acknowledges and appreciates the stakeholder's feedback and recommendations. OPSC's approach to implementing the Master Plan requirement is to closely align the proposed regulations with the statute. Recommendations for additional

STAFF ANALYSIS/DISCUSSION (cont.)

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

STAFF ANALYSIS/DISCUSSION (cont.)

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

STAFF ANALYSIS/DISCUSSION (cont.)

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

Summary of Proposed SFP Regulations

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

STAFF ANALYSIS/DISCUSSION (cont.)

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

Attachment A7b contains the proposed SFP regulatory amendments.

Proposed Amendments to SFP Regulation Section 1859.2 Definitions
Amendments are proposed to add two definitions to this Section: "Form SAB 50-MP," the newly proposed Five-Year School Facilities Master Plan Checklist, and "Master Plan," a document or compilation of documents approved by the governing board of a School District that reflects at least a five-year period and that includes all of the required elements, which may be submitted electronically to OPSC, either as a digital file or via a Uniform Resource Locator (URL).

Proposed SFP Regulation Section 1859.18 Five-Year School Facilities Master Plan
This proposed new section is inserted into the SFP Regulations under Article 3, SFP Application Procedure, as submittal of the Master Plan is a condition of participation in the SFP for applications submitted on or after October 31, 2024. Comments on the notable subsections are provided below.

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

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

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

STAFF ANALYSIS/DISCUSSION (cont.)

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

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

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

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

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

STAFF ANALYSIS/DISCUSSION (cont.)

New Construction and Modernization Applications (Full Grant)		
Date of Application Submittal	When is a Board Resolution Required?	When is Master Plan required?
October 31, 2024 through 12 months from OAL approval of Regulations	At the time of application submittal*	Within 90 days of notification of application processing
>12 months after OAL approval of Regulations	N/A	At the time of application submittal
*Applications submitted between October 31, 2024 and December 3, 2024 were provided a 60-day notification to submit the required board resolution.		

New Construction and Modernization Applications for Design and/or Site Funding		
Date of Application Submittal	When is a Board Resolution Required?	When is Master Plan required?
October 31, 2024 through 12 months from OAL approval of Regulations	At the time of application submittal*	By the time the application request for full grant funding is submitted to OPSC using the *Application for Funding* (Form SAB 50-04)
>12 months after OAL approval of Regulations	At the time of application submittal	By the time the application request for full grant funding is submitted to OPSC using the Form SAB 50-04
*Applications submitted between October 31, 2024 and December 3, 2024 were provided a 60-day notification to submit the required board resolution.		

Facility Hardship Program and Seismic Mitigation Program Applications		
Date of Application Submittal	When is a Board Resolution Required?	When is Master Plan required?
On or after October 31, 2024	At the time of application submittal*	By the time of Substantial Progress certification or with the 100 percent complete *Expenditure Report* (Form SAB 50-06), whichever occurs first
*Applications submitted between October 31, 2024 and December 3, 2024 were provided a 60-day notification to submit the required board resolution.		

STAFF ANALYSIS/DISCUSSION (cont.)

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

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

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

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

STAFF ANALYSIS/DISCUSSION (cont.)

Proposed Master Plan Checklist Form

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

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

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

Proposed Certification

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

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

OPSC welcomes further feedback on these topics.

AUTHORITY

Education Code (EC) Section 17070.54 – General Provisions

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

AUTHORITY (cont.)

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

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

EC Citations Referenced in Section 17070.74

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

EC Section 14502.1 – Financial and Compliance Audits

EC Section 14502.1.

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

EC Section 17070.75 – Routine Restricted Maintenance Requirements

EC Section 17070.75.

AUTHORITY (cont.)

EC Section 17071.10 - Existing School Building Capacity

EC Section 17071.10.

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

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

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

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

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

EC Section 17071.25 - Existing School Building Capacity

EC Section 17071.25.

EC Section 17071.75 New Construction Eligibility Determination

EC Section 17071.75.

(a)…

…

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

EC Section 17071.76 – High School Attendance Area

EC Section 17071.76.

EC Section 41024 – Accounting Regulations, Budget Controls and Audits

EC Section 41024.

EC Section 52060 – Local Control and Accountability Plans

EC Section 52060.

PROPOSED REGULATIONS

Section 1859.2 Definitions

….

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

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

….

Article 3. SFP Application Procedure

Section 1859.18 Five-Year School Facilities Master Plan

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

(a) The date of local governing board approval of the Master Plan must be no more than five years earlier than the applicable deadline for submittal of the Master Plan to OPSC in Section 1859.18.1 for the type of the associated application for funding. For a period of five years following the date of local governing board approval of a Master Plan determined by OPSC to be a valid Master Plan, the School District may submit additional applications for funding to OPSC without resubmitting the previous, valid Master Plan, except as specified in subsection (b).

(b) For a period of five years following the date of local governing board approval of a Master Plan determined by OPSC to be a valid Master Plan, the School District must submit one of the following to OPSC as a required component of an additional application for funding, only if any changes in enrollment, capacity, or other areas have materially affected components of the Master Plan required in subsection (d):
(1) An updated, valid Master Plan with all required information.
(2) A governing board resolution updating the components required in subsection (d) that were materially affected and a description of what changed.

(c) Once a period of five years has elapsed following the date of a previous local governing board approval of a Master Plan determined by OPSC to be a valid Master Plan, the School District shall submit an updated, valid Master Plan as a required component of additional applications for funding. The updated Master Plan must reflect a new five-year period as

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

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

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

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

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

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

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

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

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

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

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

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

(C) The year, if any, each building that is currently used for instructional purposes was last modernized with either local or state funds.
(D) The pupil capacity of each school, listed by grade level including Special Day Class, Non-severe and Severe pupils.
(E) The age, determined in accordance with Section 1859.60, and number of portable buildings.
(F) Whether each school has any of the following ancillary facilities:
1. A cafeteria
2. A kitchen
3. A multipurpose room or hybrid multipurpose room
4. A library
5. A gymnasium or hybrid gymnasium
6. An auditorium and/or performing arts facility
7. Athletic facilities, including but not limited to, pools, stadiums, etc.
8. Career technical education facilities, including but not limited to, barns, shops, and outdoor student work areas.

(3) Existing classroom capacity at each school site, as determined pursuant to Education Code Sections 17071.10 and 17071.25.
(4) Projected enrollment growth for the School District over the next five years, accounting for growth pursuant to Education Code Sections 17071.75 and 17071.76.
(5) A capital planning budget outlining the School District's significant capital outlay projects included in the Master Plan. The budget shall outline the estimated costs for each project for each fiscal year.
(6) The financing and other funding sources that would be used to support the acquisition of any applicable school site, new construction project, modernization project, and lead testing and remediation projects included in the Master Plan.
(7) Verification of the School District's current assessed value from the county audit controller or other appropriate local government entity that collects and maintains this information.
(8) The School District's deferred maintenance plan certified by the local governing board pursuant to Education Code Section 17070.75.
(9) A narrative describing how the Master Plan is consistent with the goals, actions, and services identified in the School District's local control and accountability plan for the first state priority, as described in paragraph (1) of subdivision (d) of Education Code Section 52060, as it relates to school facilities.

Section 1859.18.1 Master Plan Submittal Time Frames
When submittal of a Master Plan or updated Master Plan is required pursuant to subsections (a) through (c) of Section 1859.18, inclusive, School Districts shall submit a complete Master Plan and a local governing board resolution, as applicable, to OPSC within the time frames stated below. If a complete Master Plan or a local governing board resolution is not submitted within the specified time frame, the Form SAB 50-04 shall be returned or the Apportionment may be rescinded.
(a) For Approved Applications for funding received on or after October 31, 2024, applicants to the Facility Hardship and Seismic Mitigation Programs in Sections 1859.82.1 and 1859.82.2 must submit a Master Plan as follows:
(1) A complete Master Plan must be submitted with the substantial progress certification or with the 100 percent complete Form SAB 50-06, whichever occurs first.

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

Apportionment.

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

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

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

Note: Authority cited: Sections 17070.35, Education Code.

Reference: Sections 17070,54, 17070.75, 17071.10, 17071.25, 17071.75, 17071.76 and 41024., Education Code.

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 Locater (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.

☐ The year, if any, each building that is currently used for instructional purposes was last modernized with local and/or state funds.

☐ The pupil capacity of the school listed by grade level including Special Day Class, Non-severe and Severe pupils.

☐ The age, in accordance with Section 1859.60, and number of portable buildings at the school.

☐ Whether the school has any of the following facilities:

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

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

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

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

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

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

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

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

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

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:

OFFICE OF PUBLIC SCHOOL CONSTRUCTION
STAKEHOLDER MEETING
August 28, 2025

PROPOSED GUIDELINES FOR A FIVE-YEAR SCHOOL FACILITIES MASTER PLAN

PURPOSE

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

AUTHORITY

See Attachment A7a.

BACKGROUND

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

STAFF ANALYSIS/DISCUSSION

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

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

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

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

STAFF ANALYSIS/DISCUSSION (cont.)

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

Chapter 1: An Overview of School Facility Program Guidelines for the Five-Year School Facilities Master Plan
This chapter provides background information on the inception of Master Plan requirement, defines terms, and provides direction for submittal requirements. Additionally, this section outlines submittal timelines for the various programs under the SFP, according to application type and submittal date, as this will vary by project.

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

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

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

STAFF ANALYSIS/DISCUSSION (cont.)

Chapter 3: Cost Reduction Tools
This chapter identifies some of the key areas and processes that impact the cost of construction and provides suggestions of how to achieve measurable cost savings. The concepts presented in this chapter are intended to assist school districts in creating a Master Plan that aligns with their budgetary goals. An overview of the following considerations is included throughout the chapter:

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

Chapter 4: Other Considerations
This chapter explores additional factors that school districts may consider when developing facilities plans to support the school district's goals and best serve its community. The following recommendations were provided based on input from CDE, DSA, and numerous stakeholders that provided feedback during the implementation of Proposition 2.

- Seismic Safety: A school district can conduct a seismic evaluation of the existing facilities to inform the long-term strategies outlined in its Master Plan. Seismic safety considerations extend the useful life of the building and protect the facilities' occupants.

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

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

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

STAFF ANALYSIS/DISCUSSION (cont.)

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

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

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

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

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

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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 districts[4].

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

Timelines for Submittal

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

Facility Hardship Program and Seismic Mitigation Program Applications

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

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

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

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

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

New Construction and Modernization Program Applications

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

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

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

Career Technical Education Facilities Program Applications

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

Charter School Facilities Program Applications

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

Small School District Program Applications

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

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

Natural Disaster Assistance Program Applications

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

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

Submittal Guidelines

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

Master Plan as a PDF Document

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

Master Plan as an External Link

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

Figure 1- Excerpt from *Form SAB 50-MP*

Section 3 – Required Elements

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

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

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

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

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

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

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

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

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Introduction

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

Defining Terms

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

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

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

Five-Year Requirement

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

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

…

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

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

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

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

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

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

School District Eligibility

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

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

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

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

by Regulation Sections 1859.82.1 and 1859.82.2.

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

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

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

District-wide Inventory

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

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

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

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

and year of construction and modernization[5] (if applicable). For portable buildings, the age is determined by the year it was placed onsite[6].

OPSC also recommends including:

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

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

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

[5] In the SFP modernization program, age of buildings is one year after DSA approval date
[6] A footnote could be included if the portable buildings were previously stockpiled or relocated from other sites

Example 1- OPSC Elementary School Site Map

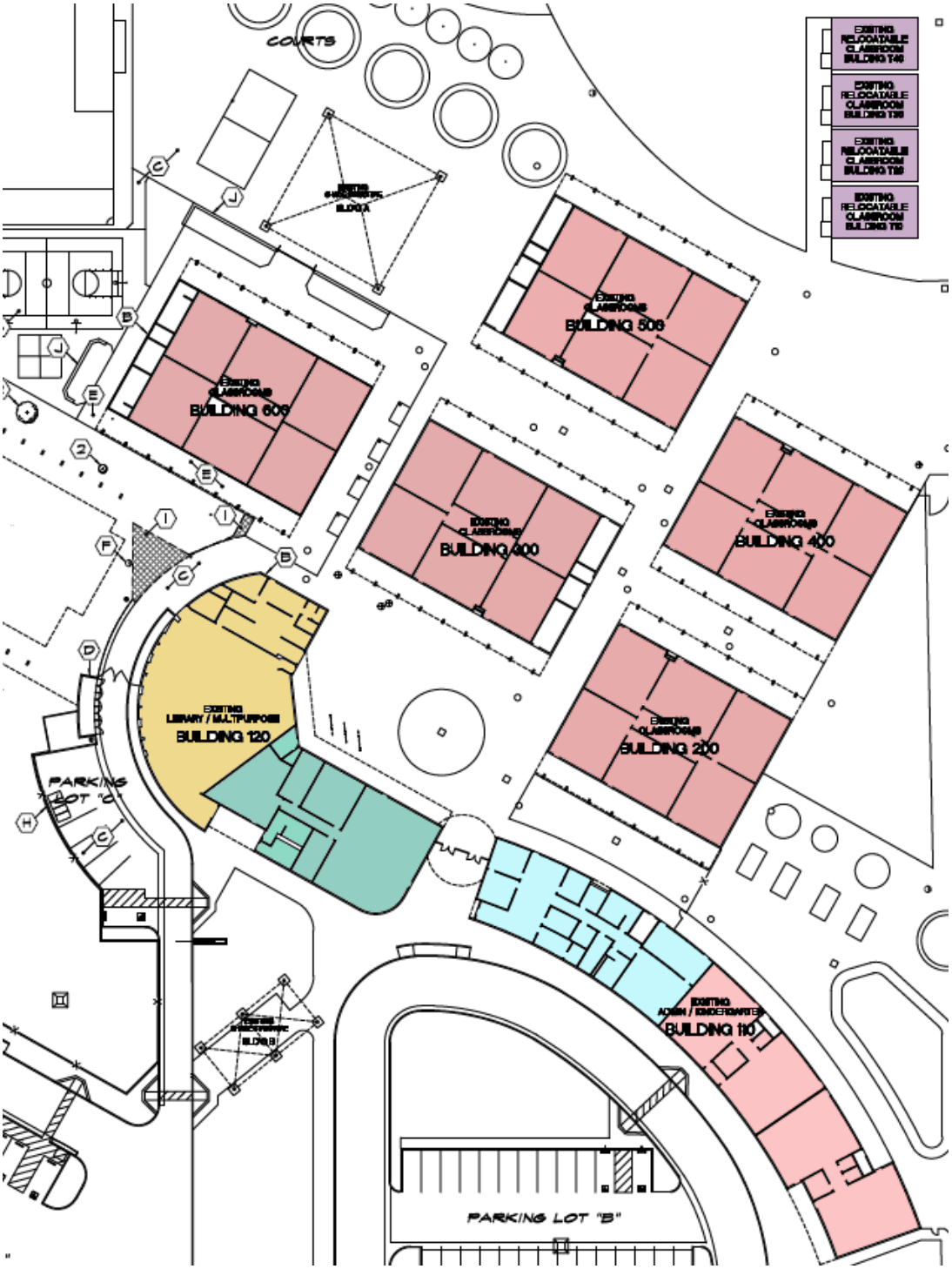


Table A

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

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

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

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

Table B

Facility Type	Elementary School Pupils	Middle School Pupils	High School Pupils
Multi-Purpose (includes food service)	5.3 sq. ft. per pupil minimum 4,000 sq. ft.	5.3 sq. ft. per pupil minimum 5,000 sq. ft.	6.3 sq. ft. per pupil minimum 8,200 sq. ft.
Toilet	3 sq. ft. per pupil minimum 300 sq. ft.	4 sq. ft. per pupil minimum 300 sq. ft.	5 sq. ft. per pupil minimum 300 sq. ft.
Gymnasium (includes shower/locker area)	N/A	12.9 sq. ft. per pupil minimum 6,828 sq. ft. maximum 16,000 sq. ft.	15.3 sq. ft. per pupil minimum 8,380 sq. ft. maximum 18,000 sq. ft.
School Administration	3 sq. ft. per pupil minimum 600 sq. ft.	3 sq. ft. per pupil minimum 600 sq. ft.	4 sq. ft. per pupil minimum 800 sq. ft.
Library/Media Center	2.3 sq. ft. per pupil plus 600 sq. ft., minimum 960 sq. ft.	3.3 sq. ft. per pupil plus 600 sq. ft. minimum 960 sq. ft.	4.3 sq. ft. per pupil plus 600 sq. ft. minimum 960 sq. ft.
Kindergarten Classrooms (including Transitional Kindergarten)	1,350 sq. ft. for each replacement classroom.	NA	NA
Classrooms (1st-12th 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**
Square Footage Break Out	Kindergarten 1	Kinder CR	1,290
	Kindergarten 2	Kinder CR	1,290
	Kindergarten 3	Kinder CR	1,290
	Kindergarten 4	Kinder CR	1,290
	Kindergarten Restroom 1	Toilet	90
	Kindergarten Restroom 2	Toilet	90
	Main Office	Administration	960

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

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

Existing Classroom Capacity

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

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

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

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

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

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

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

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

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

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

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

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

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

Projected Enrollment

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

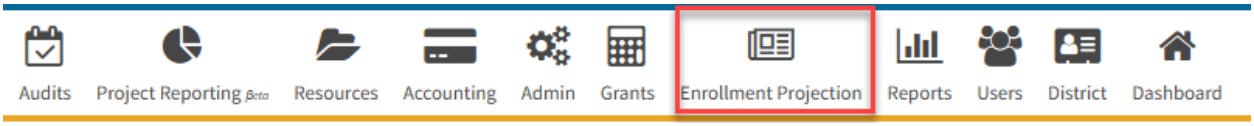
Statute requires the Master Plan to include projected enrollment growth information over the five years after the Master Plan submittal. The School Facility Program's *Enrollment Certification/Projection* (Form SAB 50-01) can be used for this purpose, part or in whole, depending on whether the application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

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

Part A. K-12 Pupil Data

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

OPSC's website also currently features an Enrollment Calculator to assist districts in determining projected enrollment.



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

Historic District-Wide Enrollment

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

Five-Year Projected Enrollment

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

Capital Planning Budget

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

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

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

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

Example 1 : Capital Planning Budget

Recommended Project List

Health, Safety, and Accessibility Projects

Facility Name	Hardcost
A. Warren McClaskey Adult Center	$542,524
A.M. Winn K-8	$35,722
Abraham Lincoln Elementary	$30,441
Albert Einstein Middle	$1,678,161
Alice Birney Public Waldorf K-8	$540,263
American Legion High	$24,649
Arthur A. Benjamin Health Professions High	$31,540
Bret Harte Elementary	$1,024,016
C.B. Wire Elementary	$473,526
C.K. McClatchy High	$6,333,995
Caleb Greenwood Elementary	$6,856
California Middle	$750,152
California Montessori Project - Capitol Campus K-8	$186,071
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

Vision Projects

School	Hardcost
Bowling Green Chacon Language & Science Academy Elementary	$35,996,740
Cesar E. Chavez Elementary	$29,112,150
Edward Kemble Elementary	$28,809,945
Ethel I. Baker Elementary	$27,441,310
Fern Bacon Middle	$53,482,600
Fr. Keith B Kenny K-8	$6,816,480
Leataata Floyd Elementary	$24,729,480
Nicholas Elementary	$38,301,030
Oak Ridge Elementary	$24,273,080
Pacific Elementary	$24,729,480
Peter Burnett Elementary	$33,049,100
Will C. Wood Middle	$55,609,400
Subtotal	$382,350,795

COST BREAKDOWN

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

Total Probable Cost

$751,558,639

Facilities Condition Assessment

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

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

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

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

Financing

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

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

FINANCIAL HARDSHIP WORKSHEET

CURRENT FINANCIAL CONDITION OF DISTRICT TO SUPPORT FINANCIAL HARDSHIP REQUEST

DISTRICT | COUNTY

CAPITAL PROJECT FUND _____

Statement of revenues, expenditures and changes in fund balance for fund _____	Column 1 Amounts from District's Audited Financial Statement June 30, _____	Column 2 Subsequent Events as of _____	Column 3 Subsequent Events as of _____
Revenues (Actual):			
Developer Fees	$0	$0	$0
Federal Funds	0	0	0
Redevelopment Funds	0	0	0
Surplus Property Sales	0	0	0
General Obligation Bonds	0	0	0
Earnings on Investments	0	0	0
Other Local Revenues	0	0	0
Other -	0	0	0
(1) Total Revenues	$0.00	$0.00	$0.00

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

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

Assessed Current Value

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

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

Deferred Maintenance Plan

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

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

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

Some examples of Deferred Maintenance projects include:

Floor Covering	Painting	Electrical	Classroom Lighting
• Carpeting • Asphalt Tile and	• Interior of classrooms, library, offices,	• Panels and boards • Signal systems,	• Substandard incandescent lighting

Vinyl Asbestos Tile • Hardwood Floors	hallways, cafeteria, restrooms, etc. • Exterior stucco, masonry, wood, and metal trim	including fire alarms and public address • Conductors and cables	and obsolete fluorescent lighting • Fixtures
Plumbing	Roofing	HVAC	Wall Systems
• Piping within boundaries • Underground gas, water • Sewer, leech fields • Well replacement	• Large sections or whole buildings of roofing systems • Flashings, gutters, and downspouts • Ceiling tiles	• Heating • Gas-fired unvented wall heaters • Other heating systems o Boilers o Piping o Individual heating units except gas-fired wall heaters • Ventilation and Air-Conditioning Systems o Central systems o 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.

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

STATE ALLOCATION BOARD
OFFICE OF PUBLIC SCHOOL CONSTRUCTION

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

The district:

- [x] 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
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

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

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

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

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

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

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

Chapter 3: Cost Reduction Tools

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Introduction

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

District Responsibilities

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

Joint-Use Facilities

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

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

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

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

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

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

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

Site Concerns

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

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

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

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

Professional Consultants

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

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

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

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

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

Contractors

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

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

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

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

Agencies

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

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

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

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

Types of Construction

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

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

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

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

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

Prototypes

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

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

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

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

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

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

Project Delivery

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

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

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

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

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

Conclusion

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

The proper design and construction process includes:

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

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

Chapter 4: Other Considerations

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Introduction

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

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

Seismic Safety:

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

Sustainability

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

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

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

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

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

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

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

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

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

Facility Inspection Tool Findings

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

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

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

School District's Education Specifications

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

> ***"The shape of our students' learning environment must be carefully planned to support our educational objectives as well as to provide clean, safe, and technologically up to date facilities. The planning process begins with the definition of educational goals and development of educational specifications."***
> *Education Specification: Linking Design of School Facilities to Educational Program, CDE, 1997*

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

AI Driven Educational Planning and Reporting Tools

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

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Appendix 1 - Authority

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

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

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

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

(1) An inventory of existing facilities, sites, and property pursuant to subdivision (d).

(2) Existing classroom capacity, as determined pursuant to Sections 17071.10 and 17071.25.

(3) Projected enrollment growth for the applicable school district over the next five years, accounting for growth pursuant to Sections 17071.75 and 17071.76.

(4) A capital planning budget outlining the applicable school district's projects.

(5) The financing and other funding sources that would be used to support the acquisition of the applicable schoolsite, new construction project, modernization project, and lead testing and remediation projects.

(6) Verification of the applicable school district's current assessed value from the appropriate local government entity that collects and maintains this information.

(7) The school district's deferred maintenance plan certified pursuant to Section 17070.75.

(8) A narrative describing how the school facilities master plan is consistent with the goals, actions, and services identified in the school district's local control and accountability plan for the first state priority, as described in paragraph (1) of subdivision (d) of Section 52060, as it relates to school facilities.

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

(1) The year each building at the school that is currently used for instructional purposes was constructed.

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

(3) The year, if any, each building that is currently used for instructional purposes was last modernized.

(4) The pupil capacity of the school.

(5) The age and number of portable buildings at the school.

(6) Whether the school has any of the following:

(A) A cafeteria or multipurpose room.

(B) A library.

(C) A gymnasium.

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

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

Appendix 2 – Form 1.02e Evaluation of School Facilities

School Facilities Unit
California State
Department of Education

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

School	Grades
Reported by	Date of report

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

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		

School Facilities Unit
California State
Department of Education

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

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

Recommendations for needed corrections and improvements:

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

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

STATE ALLOCATION BOARD
OFFICE OF PUBLIC SCHOOL CONSTRUCTION

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.

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

STATE ALLOCATION BOARD
OFFICE OF PUBLIC SCHOOL CONSTRUCTION

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

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

STATE ALLOCATION BOARD
OFFICE OF PUBLIC SCHOOL CONSTRUCTION

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 - Resources

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

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

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

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

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

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

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

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

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

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

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

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

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

CALIFORNIA'S COALITION for ADEQUATE SCHOOL HOUSING℠

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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:

Date of Application Submittal	*When is a Master Plan required?*
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,



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

Alberto M. Carvalho
Superintendent

Los Angeles Unified School District
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Board of Education
Scott M. Schmerelson, President
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Karla Griego
Kelly Gonez
Tanya Ortiz Franklin

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 Schol 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

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
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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

Hancock Park & DeLong INC
SCHOOL FACILITY CONSULTING

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 ever 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,



Jessica Love
Hancock Park & DeLong

From: Ulysses Ramirez <uramirez@ruhnauclarke.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
Assistant Facilities Services, Planning, Ext. 146

email uramirez@ruhnauclarke.com
tel (951) 684-4664
location(s) 3775 10th Street, Riverside, California, 92501

ruhnauclarke.com
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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 *Guide to Development of Long-Range Facilities Plan* 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 *recommend* 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 *complete* 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 *Expenditure Report* (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).

….

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.

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

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 Locater (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.

☐ 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).

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:

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 districts[4].

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 *Expenditure Report* (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 modernization[5] (if applicable). For portable buildings, the age is determined by the year it was placed onsite[6].

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

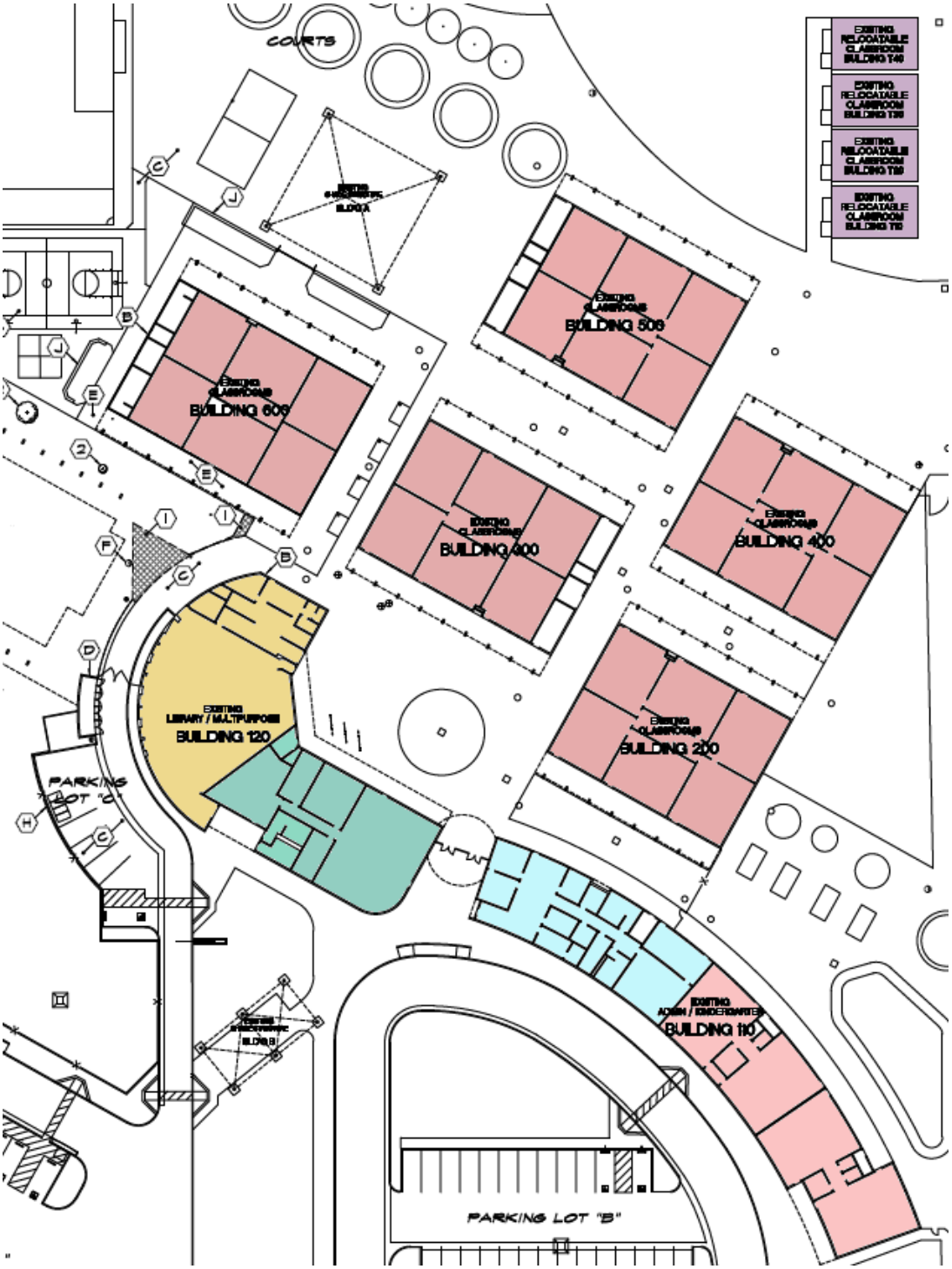


Table A

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 (1st-12th 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**
Square Footage Break Out	Kindergarten 1	Kinder CR	1,290
	Kindergarten 2	Kinder CR	1,290
	Kindergarten 3	Kinder CR	1,290
	Kindergarten 4	Kinder CR	1,290
	Kindergarten Restroom 1	Toilet	90
	Kindergarten Restroom 2	Toilet	90
	Main Office	Administration	960
	Teacher's Lounge	Administration	700
	Storage Closet	Other	55
	Staff Restroom	Toilet	125

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

Existing Classroom Capacity

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.

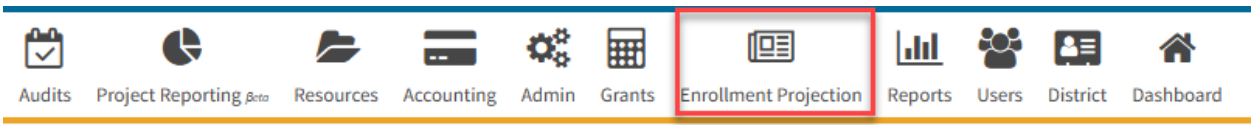
Regulation requires the Master Plan to include projected enrollment change information over the five years after the Master Plan submittal. The School Facility Program's *Enrollment Certification/Projection* (Form SAB 50-01) can be used for this purpose, part or in whole, depending on whether the application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

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

OPSC's website also currently features an Enrollment Calculator to assist districts in determining projected enrollment.



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

Historic District-Wide Enrollment

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

Five-Year Projected Enrollment

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

Capital Planning Budget

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

Facility Name	Hardcost
A. Warren McClaskey Adult Center	$542,524
A.M. Winn K-8	$35,722
Abraham Lincoln Elementary	$30,441
Albert Einstein Middle	$1,678,161
Alice Birney Public Waldorf K-8	$540,263
American Legion High	$24,649
Arthur A. Benjamin Health Professions High	$31,540
Bret Harte Elementary	$1,024,016
C.B. Wire Elementary	$473,526
C.K. McClatchy High	$6,333,995
Caleb Greenwood Elementary	$6,856
California Middle	$750,152
California Montessori Project - Capitol Campus K-8	$186,071
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

Vision Projects

School	Hardcost
Bowling Green Chacon Language & Science Academy Elementary	$35,996,740
Cesar E. Chavez Elementary	$29,112,150
Edward Kemble Elementary	$28,809,945
Ethel I. Baker Elementary	$27,441,310
Fern Bacon Middle	$53,482,600
Fr. Keith B Kenny K-8	$6,816,480
Leataata Floyd Elementary	$24,729,480
Nicholas Elementary	$38,301,030
Oak Ridge Elementary	$24,273,080
Pacific Elementary	$24,729,480
Peter Burnett Elementary	$33,049,100
Will C. Wood Middle	$55,609,400
Subtotal	$382,350,795

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

CAPITAL PROJECT FUND _____

Statement of revenues, expenditures and changes in fund balance for fund _____	Column 1 Amounts from District's Audited Financial Statement June 30, _____	Column 2 Subsequent Events as of _____	Column 3 Subsequent Events as of _____
Revenues (Actual):			
Developer Fees	$0	$0	$0
Federal Funds	0	0	0
Redevelopment Funds	0	0	0
Surplus Property Sales	0	0	0
General Obligation Bonds	0	0	0
Earnings on Investments	0	0	0
Other Local Revenues	0	0	0
Other -	0	0	0
(1) Total Revenues	$0.00	$0.00	$0.00

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

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

Bond Authority (ARBBA) List.

Assessed Current Value

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

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.

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

STATE ALLOCATION BOARD
OFFICE OF PUBLIC SCHOOL CONSTRUCTION

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/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
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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Joint-Use Facilities 31
Site Issues 32
Professional Consultants 32
Contractors 33
Agencies 33
Types of Construction 34
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Introduction

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

District Responsibilities

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

Joint-Use Facilities

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

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

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

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

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

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

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

Site Concerns

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

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

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

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

Professional Consultants

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

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

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

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

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

Contractors

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

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

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

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

Agencies

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

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

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

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

Types of Construction

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

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

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

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

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

Prototypes

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

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

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

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

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

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

Project Delivery

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

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

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

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

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

Conclusion

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

The proper design and construction process includes:

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

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

Chapter 4: Other Considerations

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AI Driven Educational Planning and Reporting Tools 40

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

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

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

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

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

Facility Inspection Tool Findings

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

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

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

School District's Education Specifications

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

> ***"The shape of our students' learning environment must be carefully planned to support our educational objectives as well as to provide clean, safe, and technologically up to date facilities. The planning process begins with the definition of educational goals and development of educational specifications."***
> *Education Specification: Linking Design of School Facilities to Educational Program, CDE, 1997*

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

AI Driven Educational Planning and Reporting Tools

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

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Appendix 1 - Authority

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

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

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

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

(1) An inventory of existing facilities, sites, and property pursuant to subdivision (d).

(2) Existing classroom capacity, as determined pursuant to Sections 17071.10 and 17071.25.

(3) Projected enrollment growth for the applicable school district over the next five years, accounting for growth pursuant to Sections 17071.75 and 17071.76.

(4) A capital planning budget outlining the applicable school district's projects.

(5) The financing and other funding sources that would be used to support the acquisition of the applicable schoolsite, new construction project, modernization project, and lead testing and remediation projects.

(6) Verification of the applicable school district's current assessed value from the appropriate local government entity that collects and maintains this information.

(7) The school district's deferred maintenance plan certified pursuant to Section 17070.75.

(8) A narrative describing how the school facilities master plan is consistent with the goals, actions, and services identified in the school district's local control and accountability plan for the first state priority, as described in paragraph (1) of subdivision (d) of Section 52060, as it relates to school facilities.

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

(1) The year each building at the school that is currently used for instructional purposes was constructed.

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

(3) The year, if any, each building that is currently used for instructional purposes was last modernized.

(4) The pupil capacity of the school.

(5) The age and number of portable buildings at the school.

(6) Whether the school has any of the following:

(A) A cafeteria or multipurpose room.

(B) A library.

(C) A gymnasium.

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

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

Appendix 2 – Form 1.02e Evaluation of School Facilities

School Facilities Unit
California State
Department of Education

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

School	Grades
Reported by	Date of report

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

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		

School Facilities Unit
California State
Department of Education

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

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

Recommendations for needed corrections and improvements:

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

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

STATE ALLOCATION BOARD
OFFICE OF PUBLIC SCHOOL CONSTRUCTION

Page 1 of 3

GENERAL INFORMATION

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

SPECIFIC INSTRUCTIONS

Part I—Authorized District Representative

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

Part II—Estimated Fiscal Year Data

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

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

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

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

STATE ALLOCATION BOARD
OFFICE OF PUBLIC SCHOOL CONSTRUCTION

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

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

STATE ALLOCATION BOARD
OFFICE OF PUBLIC SCHOOL CONSTRUCTION

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.

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

STATE OF CALIFORNIA
APPLICATION FOR FUNDING
SCHOOL FACILITY PROGRAM
SAB 50-04 (REV ~~08/25~~XX/XX)

STATE ALLOCATION BOARD
OFFICE OF PUBLIC SCHOOL CONSTRUCTION

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.

- 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).

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.

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).

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.

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.

STATE OF CALIFORNIA
APPLICATION FOR FUNDING
SCHOOL FACILITY PROGRAM
SAB 50-04 (REV ~~08/25~~XX/XX)

STATE ALLOCATION BOARD
OFFICE OF PUBLIC SCHOOL CONSTRUCTION

The school district named below applies to the State Allocation Board via the Office of Public School Construction for a grant under the provisions of Chapter 12.5, Part 10, Division 1, commencing with Section 17070.10, et seq., of the Education Code and the Regulations thereto.

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

1. Type of Application—Check Only One

- ☐ New Construction
- ☐ New Construction (Final Apportionment)
- ☐ New Construction (Final Charter School Apportionment)
- ☐ New Construction (Overcrowding Relief Grant)
- ☐ Rehabilitation (Final Charter School Apportionment)
- ☐ Modernization
- ☐ Modernization of California Schools for Deaf/Blind
- ☐ Facility Hardship [Section 1859.82.1]
  - ☐ Conceptual Approval [Section 1859.82.3(a)]
  - ☐ Replacement Site
  - ☐ Replacement School Building(s):
    - Toilets (sq. ft.) _____
    - Other (sq. ft.) _____
  - ☐ Rehabilitation Costs: $_____
- ☐ Seismic Mitigation [Section 1859.82.2]
  - ☐ Conceptual Approval [Section 1859.82.3(b)]
  - ☐ Replacement Site
  - ☐ Replacement School Building(s):
    - Toilets (sq. ft.) _____
    - Other (sq. ft.) _____
  - ☐ Seismic Rehabilitation Grant: $_____

Separate Apportionment

- ☐ Site Only—New Construction [Section 1859.81.1]
- ☐ Site Only (District owned)—New Construction [Section 1859.81.2]
- ☐ Site Only—Environmental Hardship [Section 1859.75.1]
- ☐ Design Only—New Construction [Section 1859.81.1]
- ☐ Design Only—New Construction with High Performance
- ☐ Design Only—Modernization
- ☐ Design Only—Modernization with High Performance
- ☐ Design Only—Modernization of California Schools for Deaf/Blind
- ☐ Design Only—Facility Hardship [Section 1859.82.1]
- ☐ Design Only—Seismic Mitigation [Section 1859.82.2]
- ☐ Advance Funding for Evaluation and RA

2. Type of Project

a. ☐ Elementary School
☐ Middle School
☐ High School

Total Pupils Assigned:
K–6: _____
7–8: _____
9–12: _____
Non-Severe: _____
Severe: _____

b. ☐ 50 Years or Older Building Funding (Modernization Only)
Total Eligible Classrooms/Square Footage: _____
Classroom/Square Footage at Least 50 Years Old: _____
Ratio of 50 Years Old Classrooms/Square Footage: _____ %

From 2a above, how many are 50 Year or Older Pupil Grants?
K–6: _____
7–8: _____ Non-Severe: _____
9–12: _____ Severe: _____

c. Included in 2a above, how many pupils are generated by the Alternative Enrollment Projection? (New Construction Only)
K–6: _____
7–8: _____ Non-Severe: _____
9–12: _____ Severe: _____

d. If the request is to replace 75 Years or Older Facilities (Modernization Only)
Number of existing classrooms being demolished _____
The total square footage of non-classroom space being demolished _____
The number of classrooms being constructed _____
The total square footage of non-classroom space being constructed _____
From 2a above, how many are 75 Years or Older Pupil Grants?
K–6: _____
7–8: _____ Non-Severe: _____
9–12: _____ Severe: _____

e. Is this a 6–8 school? ☐ Yes ☐ No
If you answered yes, how many K–6 pupils reported above are sixth graders? _____
Is this an Alternative Education School? ☐ Yes ☐ No

f. Is this a use of grant request pursuant to Section 1859.77.2? ☐ Yes ☐ No
Is this request pursuant to Section 1859.77.2(c)? ☐ Yes ☐ No
If yes, enter date of successful bond election: _____
Is this a use of grant request pursuant to Section 1859.77.3? ☐ Yes ☐ No
Is this request pursuant to Section 1859.77.3(c)? ☐ Yes ☐ No
If yes, enter date of successful bond election: _____

g. Charter School Facilities Program Rehabilitation Request:
Toilets (sq. ft.) _____
Other (sq. ft.) _____

h. Project to be located on:

- ☐ Leased Site
- ☐ New Site
- ☐ Existing Site with Additional Acreage Acquired
- ☐ Existing Site with No Additional Acreage Acquired

i. ORG Projects Only

NAME OF ELIGIBLE SCHOOLSITE(S)	NUMBER OF PORTABLES BEINGREPLACED	NUMBER OF SITE SPECIFIC ELIGIBLE PUPILS BEING REQUESTED
	Total	

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

Grade	3rd Prev. /	2nd Prev. /	Previous /	Current /
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: _____

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

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.

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 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,

- 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,

- 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

STATE OF CALIFORNIA
APPLICATION FOR CHARTER SCHOOL PRELIMINARY APPORTIONMENT
SCHOOL FACILITY PROGRAM
SAB 50-09 (REV ~~10/14~~XX/XX)

STATE ALLOCATION BOARD
OFFICE OF PUBLIC SCHOOL CONSTRUCTION

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~~aquisition~~ 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.goc/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).

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

a. Select the type of project that best represents this application request.
b. 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

a. Enter the estimated number of pupils, by grade level, that will attend the Charter School.
b. 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).
c. 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.

a. Check the box if the applicant request additional funding due to multilevel construction. See Section 1859.163.1(a)(2).
b. Site Acquisition:

   1) 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.
   2) 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.
   3) 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).

c. 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.

d. Check the box if the proposed project is eligible for an increase due to geographic location. See Section 1859.163.1(a)(7).
e. Check the box if this request is for a small size project. See Section 1859.163.1(a)(5).
f. 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

a. Check the box if the proposed project is eligible for an increase due to geographic location. See Section 1859.163.5(a)(4).
b. Check the box if this request is for a small size project. See Section 1859.163.5(a)(2).
c. Check the box if the proposed project qualifies for an urban location allowance. See Section 1859.163.5(a)(3).
d. 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.
e. Enter the number of additional stops on new DSA required elevator(s) beyond two.

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.

STATE OF CALIFORNIA
APPLICATION FOR CHARTER SCHOOL PRELIMINARY APPORTIONMENT
SCHOOL FACILITY PROGRAM
SAB 50-09 (REV ~~10/14~~XX/XX)

STATE ALLOCATION BOARD
OFFICE OF PUBLIC SCHOOL CONSTRUCTION

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

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.

• 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

STATE OF CALIFORNIA
APPLICATION FOR CAREER TECHNICAL EDUCATION FACILITIES FUNDING
SCHOOL FACILITY PROGRAM
SAB 50-10 (REV ~~10/14~~ XX/XX)

STATE ALLOCATION BOARD
OFFICE OF PUBLIC SCHOOL CONSTRUCTION

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.

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.

STATE OF CALIFORNIA
APPLICATION FOR CAREER TECHNICAL EDUCATION FACILITIES FUNDING
SCHOOL FACILITY PROGRAM
SAB 50-10 (REV ~~10/14~~ XX/XX)

STATE ALLOCATION BOARD
OFFICE OF PUBLIC SCHOOL CONSTRUCTION

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,

- 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 (l) 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		

STATE OF CALIFORNIA
APPLICATION FOR NATURAL DISASTER ASSISTANCE

STATE ALLOCATION BOARD
OFFICE OF PUBLIC SCHOOL CONSTRUCTION

SAB 195 (~~New xx/25~~ REV XX/XX)

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/opsconline.

1. Type of Application

a. Check the appropriate box that indicates whether this application is a new or an amended Natural Disaster Assistance request.
b. 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.
c. 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.
d. 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.
e. 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:

a. 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.

STATE OF CALIFORNIA
APPLICATION FOR NATURAL DISASTER ASSISTANCE

STATE ALLOCATION BOARD
OFFICE OF PUBLIC SCHOOL CONSTRUCTION

SAB 195 (~~New xx/25~~ REV XX/XX)

SCHOOL DISTRICT		APPLICATION NUMBER
SCHOOL NAME		PROJECT TRACKING NUMBER
COUNTY	DISTRICT REPRESENTATIVE'S E-MAIL ADDRESS	HIGH SCHOOL ATTENDANCE AREA (HSAA) OR SUPER HSAA (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): _____

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:

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:

STATE OF CALIFORNIA
APPLICATION FOR NATURAL DISASTER ASSISTANCE

STATE ALLOCATION BOARD
OFFICE OF PUBLIC SCHOOL CONSTRUCTION

SAB 195 (~~New xx/25~~ REV XX/XX)

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,

• 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.

SIGNATURE OF AUTHORIZED SCHOOL DISTRICT REPRESENTATIVE	DATE

Alberto M. Carvalho
Superintendent

Los Angeles Unified School District
Legislative Affairs & Government Relations

Sacramento Office: 1201 K St., Suite 1040
Sacramento, CA 95814
Administrative Office: 333 S. Beaudry Ave., 24th Floor
Los Angeles, CA 90017
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Board of Education
Scott M. Schmerelson, President
Dr. Rocío Rivas, Vice President
Sherlett Hendy Newbill
Nick Melvoin
Karla Griego
Kelly Gonez
Tanya Ortiz Franklin

November 21, 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 #18

Dear Ms. Kirk,

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

The comments and recommendations provided below correspond to the topics raised and materials provided for the November 6, 2025, Implementation Stakeholder Meeting #18.

Five-Year School Facilities Master Plan

Proposed Form SAB 50-MP - Section 3 Required Elements (page 25) – Under the second checkbox, the form states, in part, "The Master Plan includes an inventory of existing school facilities for each active/closed school site…" However, OPSC's response to stakeholder comment #5 states that the inclusion of closed school sites is recommended but not required. Los Angeles Unified recommends the form reflect only what is required by regulations or include language about required versus recommended information.

Proposed Form SAB 50-MP - Section 3 Required Elements (page 26) – Under the eighth checkbox, the form states, in part, "The Master Plan includes projected enrollment change for the School District

over the next five years, accounting for growth…" However, OPSC's response to stakeholder comment #7 and proposed regulation section 1859.18(d)(4) "growth" is supposed to be "changes". Los Angeles Unified recommends this form section be updated to reflect the proposed regulation language.

Proposed Form SAB 50-MP - Section 4 Certifications and Acknowledgements (page 27) – Under the third checkbox, the form states "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." Los Angeles Unified requests additional information on what OPSC envisions the auditor's role in validating the master plan will be.

Additionally, the Los Angeles Unified requests clarification on whether the statement authorizes a penalty for any oversight in the preparation of the master plan, and if so, requests the statue references that authorizes the penalty.

Proposed School Facility Program Guidelines for the Five-Year School Facilities Master Plan (page 42) – The final sentence of this page states, in part, "Please note that the site plan/map shall…" Los Angeles Unified believes the reference to "site plan/map" should be "master plan" and suggests this be revised.

Sincerely,



Sasha Horwitz
Legislative Advocate
Los Angeles Unified School District

Email to: OPSCCommunications@dgs.ca.gov

November 21, 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,

We appreciate the continued opportunity to provide input on the implementation of the Five-Year School Facilities Master Plan requirement under Proposition 2. We would like to acknowledge and thank OPSC for incorporating several of the third-party climate resilience and sustainability resources we previously recommended into Appendix 4 of the Master Plan Guidelines. This step will support districts in accessing relevant reference materials.

However, we want to note that this incorporation occurred only in the voluntary Guidelines, not in the regulatory requirements or the Five-Year Master Plan Checklist (Form SAB 50-MP). Therefore, the changes were limited to non-binding informational resources, rather than placement in the core planning, inventory, or compliance elements of the Master Plan. This distinction is significant, because only the regulatory and checklist components determine what information must be included for Master Plans to be considered complete, valid, and auditable for purposes of participating in the School Facility Program.

We are therefore writing again to express significant concern that the substantive recommendations from this group—particularly those related to facility condition reporting, climate-responsive operational planning, and basic indoor and outdoor environment indicators—were not incorporated into either the proposed regulations or the Form SAB 50-MP checklist.

We believe these recommendations are minimal data elements necessary to ensure that Master Plans fulfill the statutory intent of Education Code §17070.54, which is to produce facility inventories and planning documents sufficient to inform safe, equitable, long-term capital decision-making.

This comment reinforces the need for the Master Plan to include a district-wide inventory of existing school facilities that includes basic indicators of whether learning environments are safe and operable under current climate conditions. We again request the inclusion of three yes/no inventory fields in the Five-Year Master Plan Checklist (Form SAB 50-MP) - see table below. Note, these fields do not expand program scope, instead they simply ensure the state can see where conditions are adequate and where they are not.

Inventory Indicator	**Purpose**	**Impact**
Central cooling system presence	Determines ability to maintain safe indoor temperatures during instructional hours	Directly influences classroom usability and emergency closure risk
Shaded outdoor play/learning area availability	Identifies safe learning and recreation space in high-heat conditions	Affects heat exposure mitigation and student outdoor access
Presence of real-time indoor air quality monitoring	Allows districts to manage wildfire smoke and ventilation performance	Impacts respiratory safety and continuity of instruction

In addition, we reiterate our recommendation that the Master Plan explicitly incorporate climate risk assessment data, including projected extreme heat days, wildfire and smoke exposure, and flood and stormwater risk. Education Code §17070.54 requires that Master Plans support accurate, long-term capital decision-making, which is not possible if they are based solely on current or historical climate conditions that no longer reflect the operational realities schools face. Including climate risk data does not mandate any particular design response; it simply ensures that districts have the minimum information necessary to plan prudently, avoid preventable future costs, and maintain continuity of instruction.

Relatedly, while the Master Plan is updated every five years, school buildings themselves are intended to operate for multiple decades. Therefore, we recommend clarifying in the Guidelines that Master Plans should reference facility performance and environmental risk projections consistent with the expected useful life of major building systems, even though the plan itself follows a five-year update cycle. This clarification is consistent with standard capital planning practice and does not impose new requirements.

Additionally, we note that even within the voluntary Guidelines, several of the coalition's recommended clarifications and structural improvements were not incorporated. Specifically, the Guidelines do not include the suggested reframing of the Sustainability section to Climate Resilience and Sustainability, the alignment of planning guidance to the useful life of facilities, or the expansion of Chapter 3 to reflect lifecycle cost reduction through energy efficiency, resilience improvements, and indoor environmental quality performance. These elements are intended to support districts in developing fiscally sound and instructionally reliable long-term plans.

We remain committed to working collaboratively with OPSC to support useful inventories, transparent planning, and continuity of instruction as climate impacts increase across school communities. The recommendations above require no new project obligations and improve the planning and accountability value of every Master Plan submitted.

We respectfully ask that OPSC consider these 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,

Andra Yeghoian
Chief Innovation Officer
Ten Strands

Heather Ippolito
President
California State PTA

Jonathan Klein
CEO and Co-founder
UndauntedK12

Mitch Steiger
Legislative Representative
CFT

Sara Hinkley
California Program Manager
Center for Cities + Schools

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