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California Public School Facility Inventory for K-12

The purpose of this item is to explore potential options for establishing a statewide database of all public school facilities in California. As part of this agenda, Staff has prepared a historical overview of a past school facility inventory system developed for California schools and information on systems in place in other states. Some California school districts have already developed their own facility inventory systems. In addition to the Staff report in this agenda, the following agencies will present information on their facility inventory systems:

San Diego City Unified School District

Los Angeles Unified School District

California Community Colleges

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California Public School Facility Inventory for K-12

Purpose of Report

The purpose of this item is to provide background on prior California K-12 public school facility inventory (SFI) system and information on other systems in use in other states.

Problem Statement/Area of Concern

Subcommittee members have expressed interest in exploring potential options for establishing a statewide database of all public school facilities in California to aid policy makers in determining future school facility funding needs.

Background – California's First School Facilities Inventory

In the mid 1980's, the State Allocation Board and the Office of Local Assistance (OLA – now known as the Office of Public School Construction) were directed by Assembly Bill 2743 9 Chapter 1680, Statutes of 1984, Hughes) to create a SFI database. The purpose of database was to provide estimates of current and projected funding needs for K-12 facilities construction and modernization. During this time, there were no reliable data sources available to the legislature and the Administration to know what school facilities existed and the condition of those facilities to formulate aggregate statewide K-12 school facility funding needs.

The OLA performed the following tasks while establishing the first SFI:

- Prepared a feasibility study in 1986 and initially contracted with BASIS/Arthur Young and Company to install hardware, software and custom develop the SFI database;
- From 1986 through 1991 the OLA collected district facility information in three phases as follows:

  Phase I - Districts were asked 12 questions, such as the number of school sites and total enrollment;

  Phase II – Districts were asked 16 questions about individual school sites, such as the name and location and facilities located on those sites such as parking lots, baseball diamonds, pools, stadiums and tracks etc. (this phase included no building information);

  Phase III – Districts were asked 29 detailed questions about each school building located on school sites reported in Phase II. The data collected included age of building, use, dimensions and specific building components and characteristics of building systems.

By 1991, the SFI database was established and included information on over 1,000 school districts and county offices of education, 7,000 school sites and over 70,000 buildings. The total cost to implement the SFI mandate was $1.1 million and used the equivalent of 3.2 full time positions to develop the SFI database, collect and enter data, and maintain the new database. The funding for this mandate came from the bond funds.

During the early 1990's, the OLA, the Legislative Analyst Office (LAO) and the Department of Finance (DOF) started to notice problems with the SFI. The first concern, as noted by the LAO's analysis of the 1990-1991 budget bill, was that the SFI database did not have complete school district data to provide reliable estimates of statewide facility needs. While almost 100 percent of the State's 1,010 school districts had provided data for Phase I and II, only about 700 districts (69 percent) provided detailed building by building specific data requested in Phase III. In addition, the OLA reported that an estimated 10 percent of school sites were omitted within the 700 districts that had provided Phase III information.

Another major area of concern with the SFI database was that the data provided by districts contained numerous errors. Based on the high error rate and incomplete/incorrect data, the SFI could not be used to reliably extrapolate State facility need estimates. The LAO noted that in reviewing a sample of 37 school districts, the data was incorrect in 62 percent of the sample. The OLA explained that the main reasons for the high error rate were:

1. The voluntary nature of the reporting of SFI data;
2. The design of the data collection instrument;
3. The existence of SFI system programming and data entry errors.

In light of these concerns, the OLA attempted to review and correct incomplete or incorrect data that was submitted during Phases I and II. Second, the OLA revised and streamlined the Phase III data collection instrument to simplify the data collection and reporting process for school districts by only asking for a count of room types, year the

building was constructed and gross square footage. In spite of these changes, school district submittals of the Phase III data continued to lag and validation efforts stalled. Ultimately, funding for the database program was terminated.

Comparison of Various State's K-12 School Facility Inventory Systems

As previously discussed, California does not have a single cohesive SFI database. It should be noted that California does have a database associated with certain high level facility information for *all* approved School Facility Program (SFP) projects since 1998. In addition, a partial and more comprehensive facility database exists that maintains Project Information Worksheet (PIW) building information data sets on a subset of SFP projects. The PIW are for select SFP New Construction projects funded on or after July 2006.

A cursory review of what other states are doing to gather school facility information revealed that California is not alone in not having a comprehensive SFI. Only Florida, Washington and New York have the processes in place and dedicated staff to create a dynamic SFI. This next section of the report will highlight the capabilities of the SFI systems utilized in Florida, Washington and New York.

Florida SFI and Building Assessment Capabilities

The State of Florida mandates that all public schools submit standardized school facility information for each school and building in their district. Florida has named its comprehensive database of schools the "Florida Inventory of School Houses" or FISH. In 2011, the Florida legislature mandated that at minimum every five years, school districts must conduct school site FISH inspections to collect current school facility data to aid in formulating plans for housing current and future students and meeting educational requirements. The statute further states that the FISH inspections and data collection efforts shall be performed by the local school board or agency designated by the school board to include an inventory of existing educational facilities and ancillary plant facilities with recommendations for new schools/additions. The standardized FISH data templates also concurrently gather facility *condition assessment* information to allow *each* school building to be evaluated for current or future repair or replacement needs.

Florida also mandates that annually each school district shall review school facility FISH data for their district and either certify that the inventory is current and accurate or update the FISH database with any pertinent facility changes. Lastly, statutes mandate that Florida's Department of Education annually conduct onsite school facility reviews to verify the accuracy of the FISH data. If the Department of Education finds inaccurate information for a given school district, that school district must submit revised and corrected FISH data within one year of the violation or school project capital outlay funds can be withheld until such time as the district has corrected its data reports.

Florida's Department of Education reviews all school buildings that have designated "unsatisfactory" building assessment ratings to make recommendations to the State legislature regarding potential school project capital outlay funding needs.

Washington SFI and Building Assessment Capabilities

The State of Washington has a SFI and assessment of facility condition program called the Inventory and Condition of Schools (ICOS). Participation is limited to those school districts that are seeking state school facility funding. The State of Washington's Office of the Superintendent of Public Instruction annually receives school facility information from 40 percent of the state's school districts that have received state facility funding. These school districts provide SFI and facility assessment information as a condition of receiving state school facility funding. School districts that receive state funding are also required to submit an independent building condition assessment certification every six years for a period of 30 years.

Washington's ICOS also provides the current assessment or condition of each building, rooms within the building and equipment components located within each building. Each building is rated for overall condition on a scale of 0 to 100 with 100 representing a new condition. Each building component is also rated as excellent, good, fair, poor or unsatisfactory. When building components are rated as poor or unsatisfactory, corrective actions to fix the deficiency are noted. When building components are rated as poor or unsatisfactory, a description of the component that needs replacement repair or maintenance to perform at an optimal level must be detailed.

Since the State of Washington lacks comprehensive SFI data for the other 60 percent of school districts that are not currently requesting state funding, the state Legislature initiated a pilot program in 2008 examining the feasibility and costs of statewide data collection on all K-12 school sites and facilities. This pilot project demonstrated that it was feasible to collect most of the needed K-12 facility data. The State of Washington continues up to the present to analyze options and explore various strategies for making a statewide K-12 SFI and assessment database for all public school districts a reality in the future.

New York SFI and Building Assessment Capabilities

New York State, similar to Florida, has SFI and building assessment program for all of their public schools. New York State mandates that all public school districts provide a Five Year Capital Facilities Plan. This plan must be updated annually and reviewed by the State's Education Department to approve the school district project priorities. The goal of the five year plan is to collect, coordinate, analyze and prioritize facility infrastructure and building program needs on a district-wide basis. Any new school facilities, classroom construction or site acquisition must also be included in the Five Year Capital Facilities Plan. Prior to mandating the Five Year Capital Facilities Plan requirement, New York struggled periodically to determine what school buildings existed, knowing what their condition was and how to prioritize and approve the neediest school construction or renovation projects.

New York also requires building assessment information on all school districts with information such as the last year of reconstruction/replacement, expected remaining useful life and cost of repair or replacement for the building or system. Building assessments are performed by licensed engineers and each building or system is rated for level of adequacy. Ultimately, each school district's Five Year Capital Facilities Plan, building assessment, health and safety risk and school enrollment projections are analyzed by the State Department of Education. School districts are either approved or disapproved for future state funding based on that information.

INFORMATION CONTAINED IN FLORIDA, WASHINGTON AND NEW YORK SFI

Type of SFI Data	Florida	Washington	New York
Name of school and address	X	X	X
Number of acres per site	X	X	
Parcel numbers	X	X	
Detail about the type of site improvements (i.e. athletic fields, playgrounds, parking lots, pools, stadiums etc.)	X	X	X
Current building status such as: occupied, leased to others, leased from others, vacant etc.		X	
Grades served at the school	X	X	X
Building age, number of stories, total square footage	X	X	X
Identification of types of rooms within the building (i.e. classroom, multi, library, cafeteria, admin. etc.)	X	X	X
Specifics about building type (i.e. wood frame, steel frame, concrete and steel etc.)	X	X	X
The condition of various site components such as sidewalks, parking lots, playgrounds, athletic fields, pools, stadiums etc.)		X	X
Assessed condition of rooms within buildings	X	X	X
Assessed condition/life expectancy of building systems (i.e. cooling and heating systems, lighting, electrical, plumbing, doors, windows, roof, elevators etc.)	X	X	X
Buildings that are potentially subject to a disaster such as floods and earthquakes		X	
School funding need data used by the State to fund projects	X	X	X

Considerations

While exploring the possible creation of a California SFI, decision makers may wish to consider the following:

- What type of school facility data the State needs;
- How to capture the data;
- How to minimize costs and avoid State mandated costs associated with capturing SFI data;
- What agency will develop and maintain the database;
- How often the data should be updated;
- How to ensure integrity of the data.

If facility condition assessments are also part of the SFI, policy makers may also wish to consider the following:

- How often building condition assessments are necessary to determine the need for renovation, repair, useful life expectancies of building systems;
- How facility condition assessments will be conducted;
- Who should perform the assessments;
- How to minimize costs associated with the facility assessments.

San Diego Unified
SCHOOL DISTRICT

Facilities Inventory Management

California State Allocation Board
Program Review Subcommittee

October 1, 2013

Lee Dulgeroff, Executive Director
Facilities Planning and Construction
San Diego Unified School District

San Diego Unified

- 132,000 students
- Second largest in California
- 223 total educational facilities
  - 116 elementary schools, including K-8
  - 24 middle schools
  - 26 high schools
  - 14 atypical schools
  - 44 charter schools
- Diverse Student Population

- 15 ethnic groups and more than 60 languages and dialects
- Socioeconomic make-up:
  - 28% English learners
  - 64.9% eligible for free or reduced cost meals

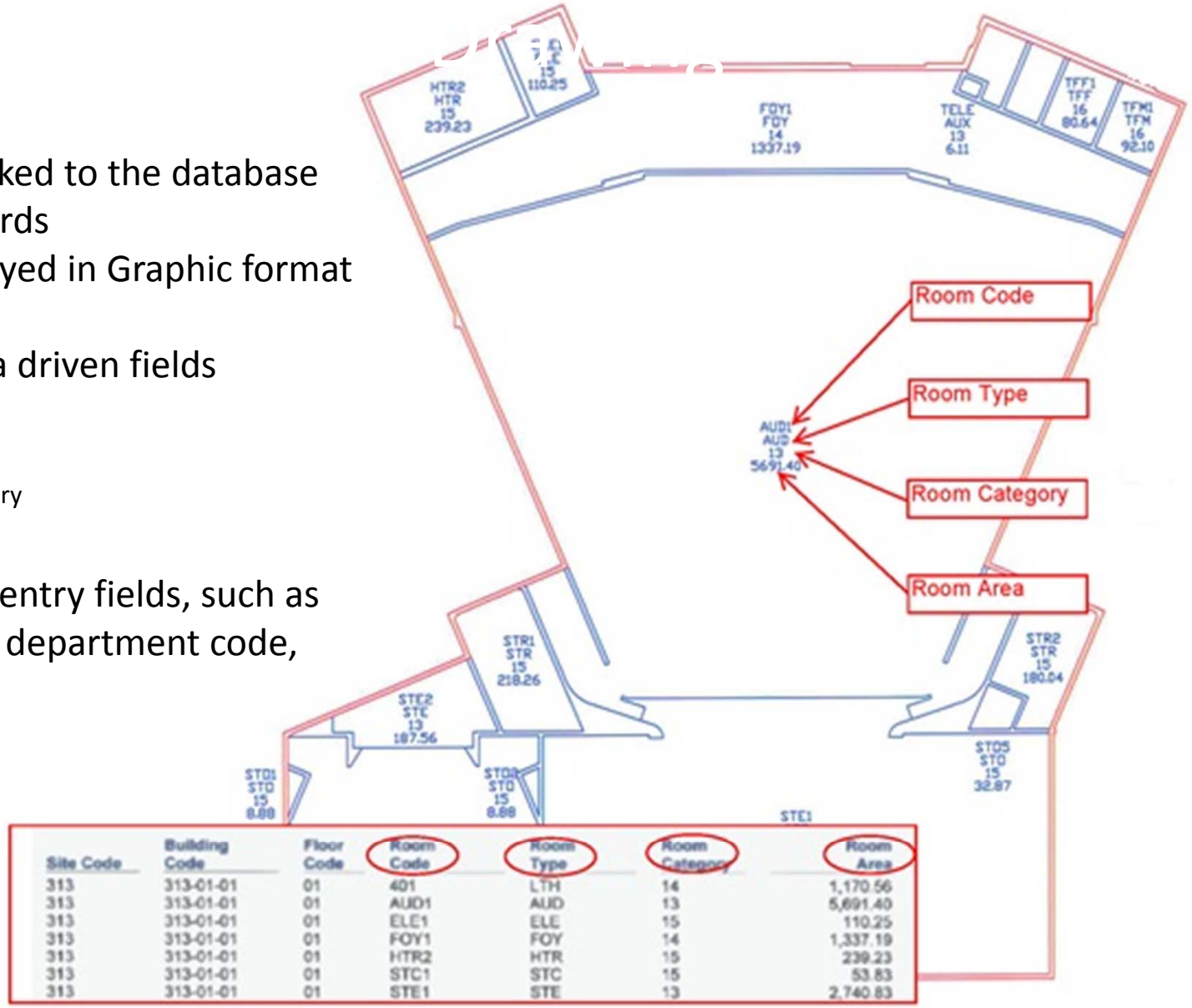
Facilities Inventory

- 208 District Owned Sites
- 2,382 Acres
- 15,109,817 Square Feet
- 3,817 Permanent & Portable Buildings
- 1,573 Permanent Buildings
- 2,244 Portable Buildings
- 41 Years Average Age of Permanent buildings

Facilities Inventory System

- Computer Aided Facilities Management (CAFM)
- Software - ARCHIBUS/FM 18 with Overlay for AutoCAD
  - 13 years with this system
  - SQL Server Backend

- 4,254 CAD files linked to the database
- 30,113 Room records
- Data can be displayed in Graphic format or Tabular Format
- Four drawing data driven fields
    - Room Code
    - Room Type
    - Room Category
    - Room Area
- 33 static or hard entry fields, such as room use, dates, department code, address, etc.



Site Code	Building Code	Floor Code	Room Code	Room Type	Room Category	Room Area
313	313-01-01	01	401	LTH	14	1,170.56
313	313-01-01	01	AUD1	AUD	13	5,691.40
313	313-01-01	01	ELE1	ELE	15	110.25
313	313-01-01	01	FOY1	FOY	14	1,337.19
313	313-01-01	01	HTR2	HTR	15	239.23
313	313-01-01	01	STC1	STC	15	53.83
313	313-01-01	01	STE1	STE	13	2,740.83

San Diego Unified
SCHOOL DISTRICT

CAFM Benefits

- Improved quality of information
- Save staff time in information retrieval
- Accurate comprehensive data informs good planning decisions
- Speeds Facility Design/Planning cycle
- Reduced duplication of effort between departments

Facility Condition Assessments (FCAs)

- San Diego Unified' s policy requires district facilities to be assessed on a 5-year cycle
- FCA data supports capital planning and the annual major repair and replacement plan
- Comprehensive approach
  - A/E teams document and quantify the condition and lifecycle of all major systems and components utilizing industry standard Uniformat II guidelines
  - Items are prioritized based on several factors including, but not limited to; safety, code compliance, preservation of assets, educational adequacy, etc.
  - Completed 74 school campuses using this model, totaling approximately 7.8 million square feet of building area

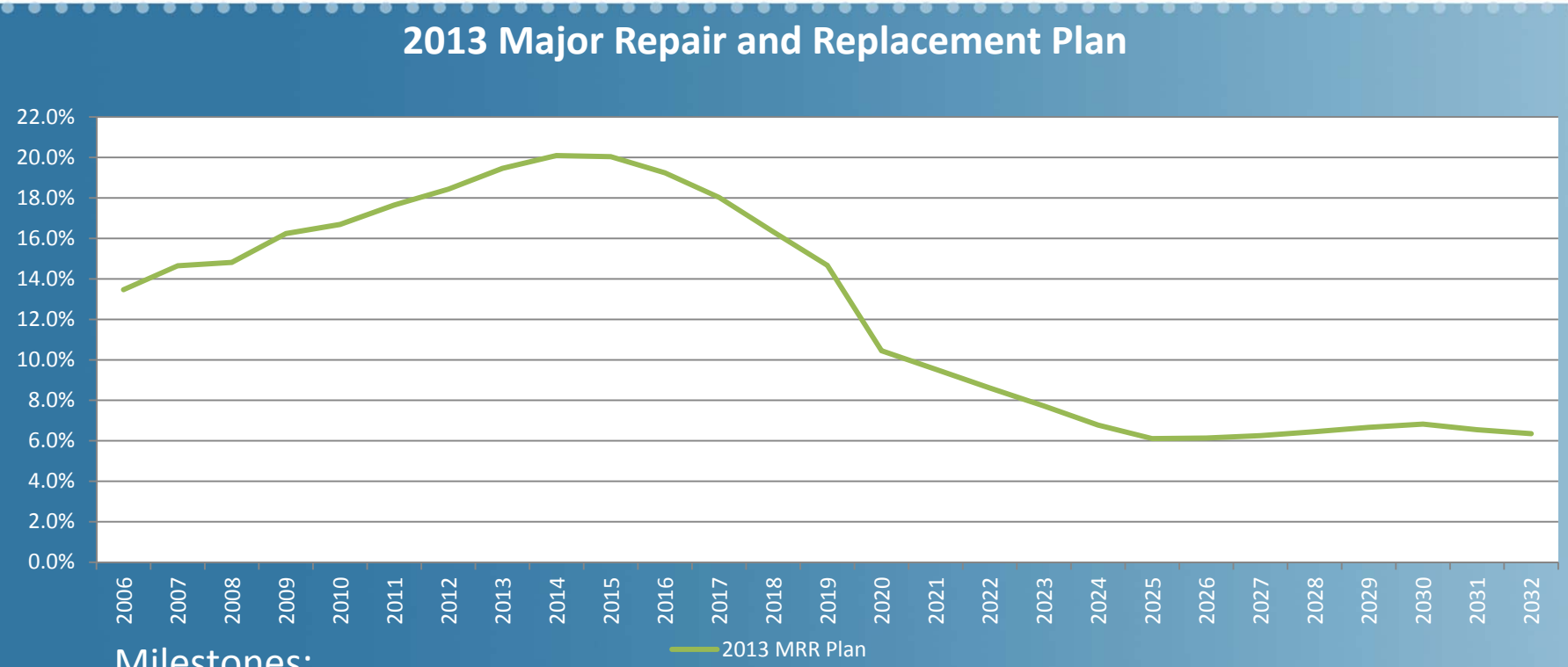
Facility Condition Index (FCI)

- Facility Condition Index (FCI)
  - A numerical rating system that translates FCAs into a rational measurement of facility needs
  - The cost of repairs needed divided by the CRV = FCI
  - According to the Association of Physical Plant Administrators (APPA) guidelines, an FCI of 0-5% is considered to be good; between 6 and 10% is fair; and greater than 10% is poor.
- Facilities repair, replacement, and renovation needs (backlog) is $1.1B
- Current replacement value (CRV) is $5.3B
- District-wide total FCI is 20.1%.

Achieving Good Condition

- Building deterioration and inflation continue
- APPA 2% to 4% CRV per year deterioration
  - San Diego Unified CRV $5.3B x 2% = $106M per year
  - Inflation on current repair backlog $20M per year
- Rates of deterioration change with
  - Preventative maintenance and repair
  - Climate & weather
  - Building Use
- Analyze the cost of deterioration and inflation over time
- Determine annual funding needed over time
  - Local & state facilities bonds
  - District maintenance & repair budgets
  - Account for other type of facilities upgrades e.g. ADA and repair by replacement

Facility Condition Index (FCI)



Milestones:

- 2013 FCI 20.1%
- 2020 reduced to 10.4%
- 2025 reduced to 6.1% (12 years)
- 2032 $3.05B total expended to achieve and maintain 6% (2008 – 2032)

Conclusion & Questions

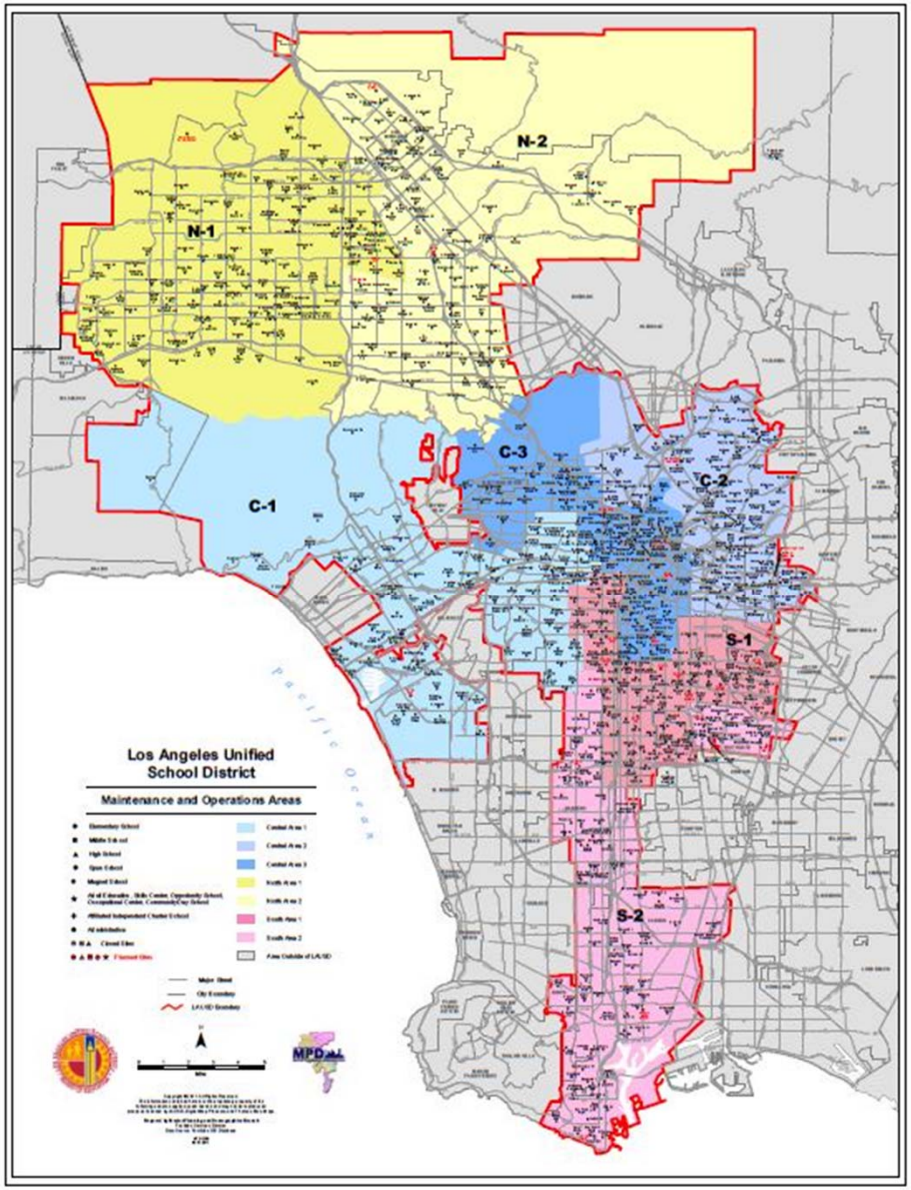
- Computer Aided Facilities Management
- Best Practices FCAs and FCI analysis
- Facilities Plan

Los Angeles Unified School District

Maintenance & Operations

Facility Condition Assessment (FCA)

LAUSD School Inventory



- **High Schools: 89**
- **Middle Schools: 87**
- **Elementary Schools: 540**
- **Others: 178**

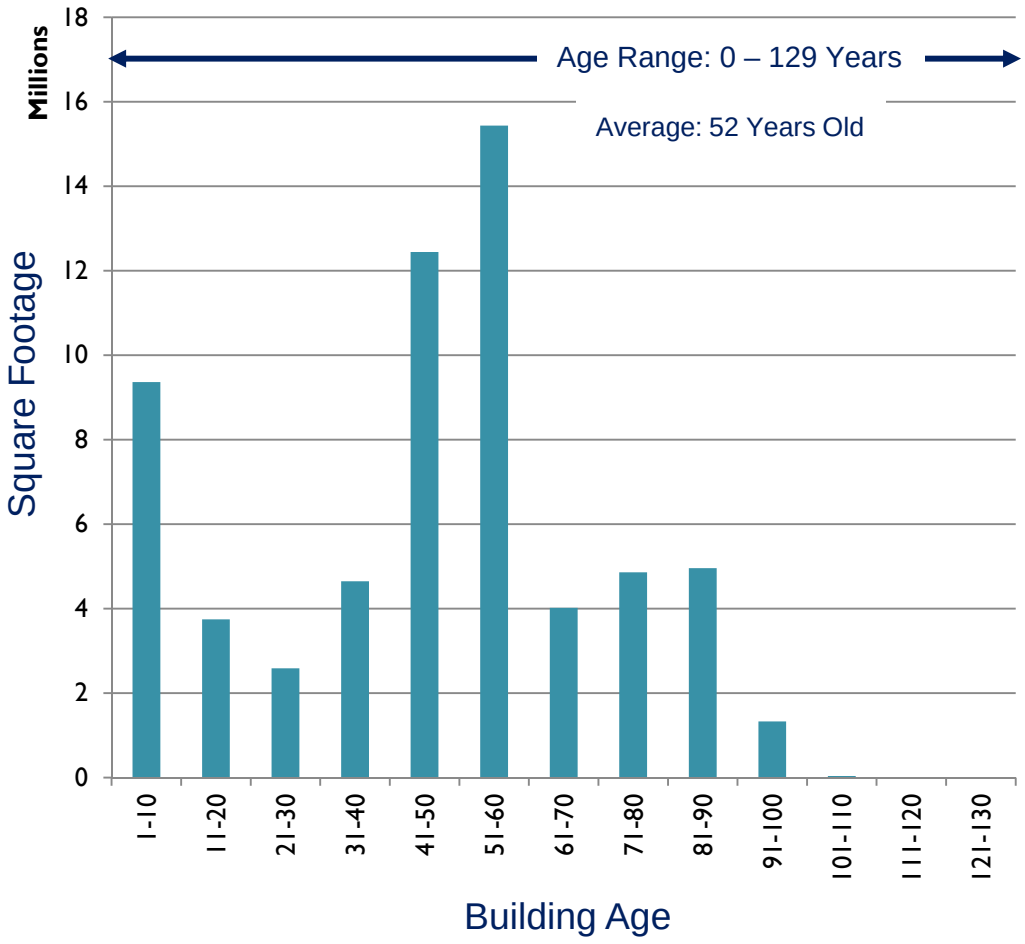
- **Total # of Buildings: 12,736**
- **Total # of Sites: 894**

Total SQFT: 70,834,648

Age of Schools: Avg. Over 50 Yrs.

Building Age/SQFT Distribution

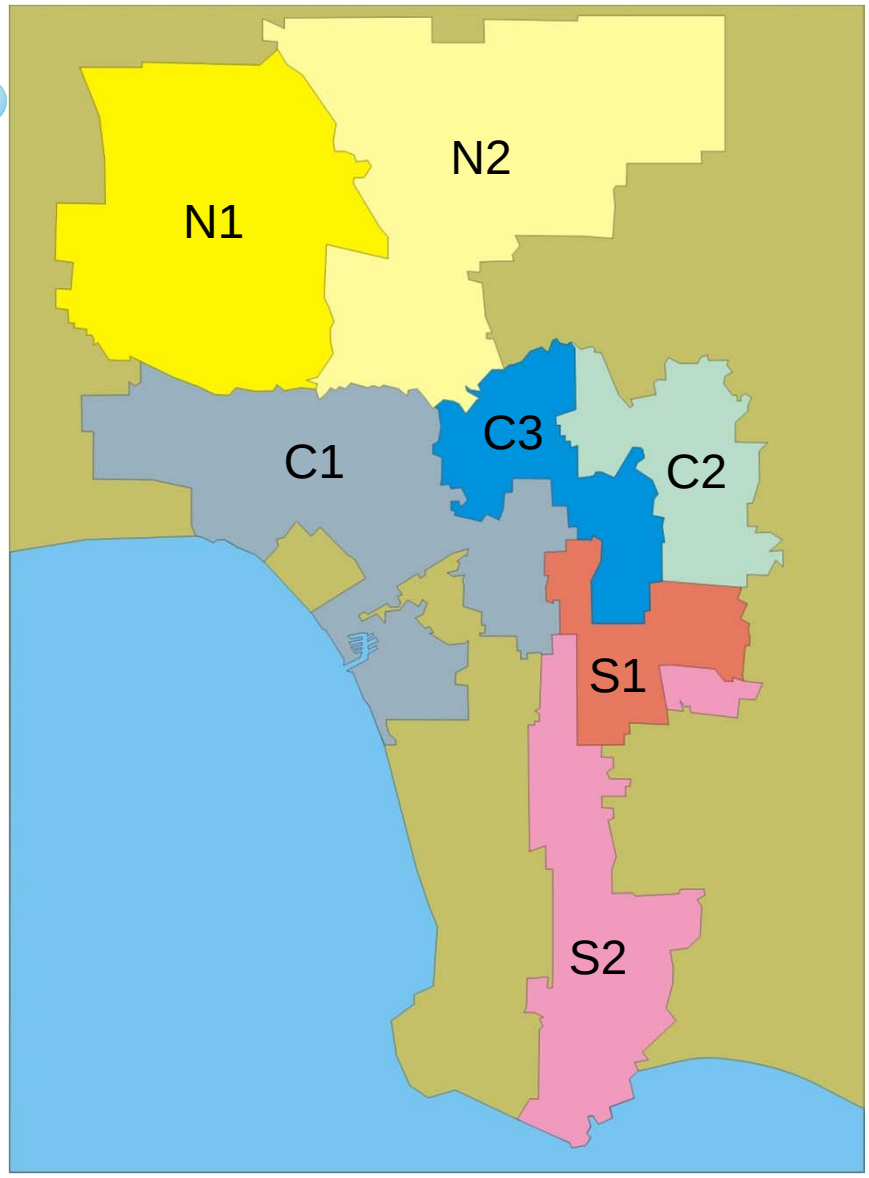
Age	SQFT
1-10	9,363,296
11-20	3,744,467
21-30	2,587,562
31-40	4,647,322
41-50	12,442,152
51-60	15,437,004
61-70	4,018,169
71-80	4,860,187
81-90	4,957,325
91-100	1,328,298
101-110	34,864
111-120	3,166
121-130	2,240



LAUSD FCA Effort

- **Focus on validating site condition**
- **Identify:**
  - Serviceable components by space
  - Life Cycle for each component
  - Replacement cost
  - Condition by Remaining Service Life (RSL)
- **Update spatial data in Computer-Aided Facility Maintenance (CAFM) software**
- **Develop FCI table by schools**
- **Data universally available for other reports & tools**
- **In-house staff perform surveys**

FCA Survey Teams



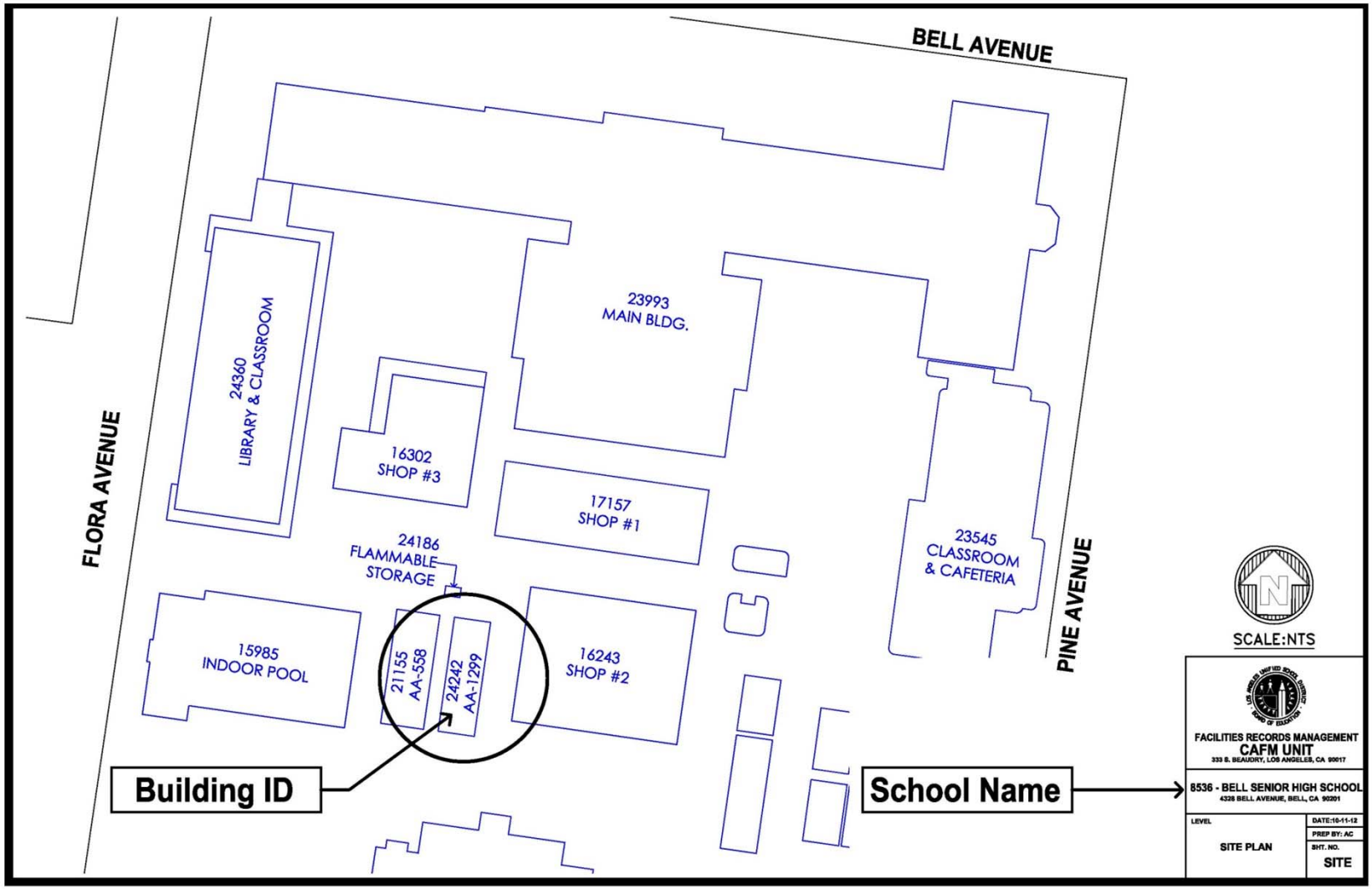
Each Team:

- Team Lead (Maint. Planner)
- 2 Carpenters (Surveyors)
- 1 Electrician (Surveyor)
- 1 Plumber (Surveyor)
- 1 HVAC Tech (Surveyor)
- 1 Draftsman

Roving Team:

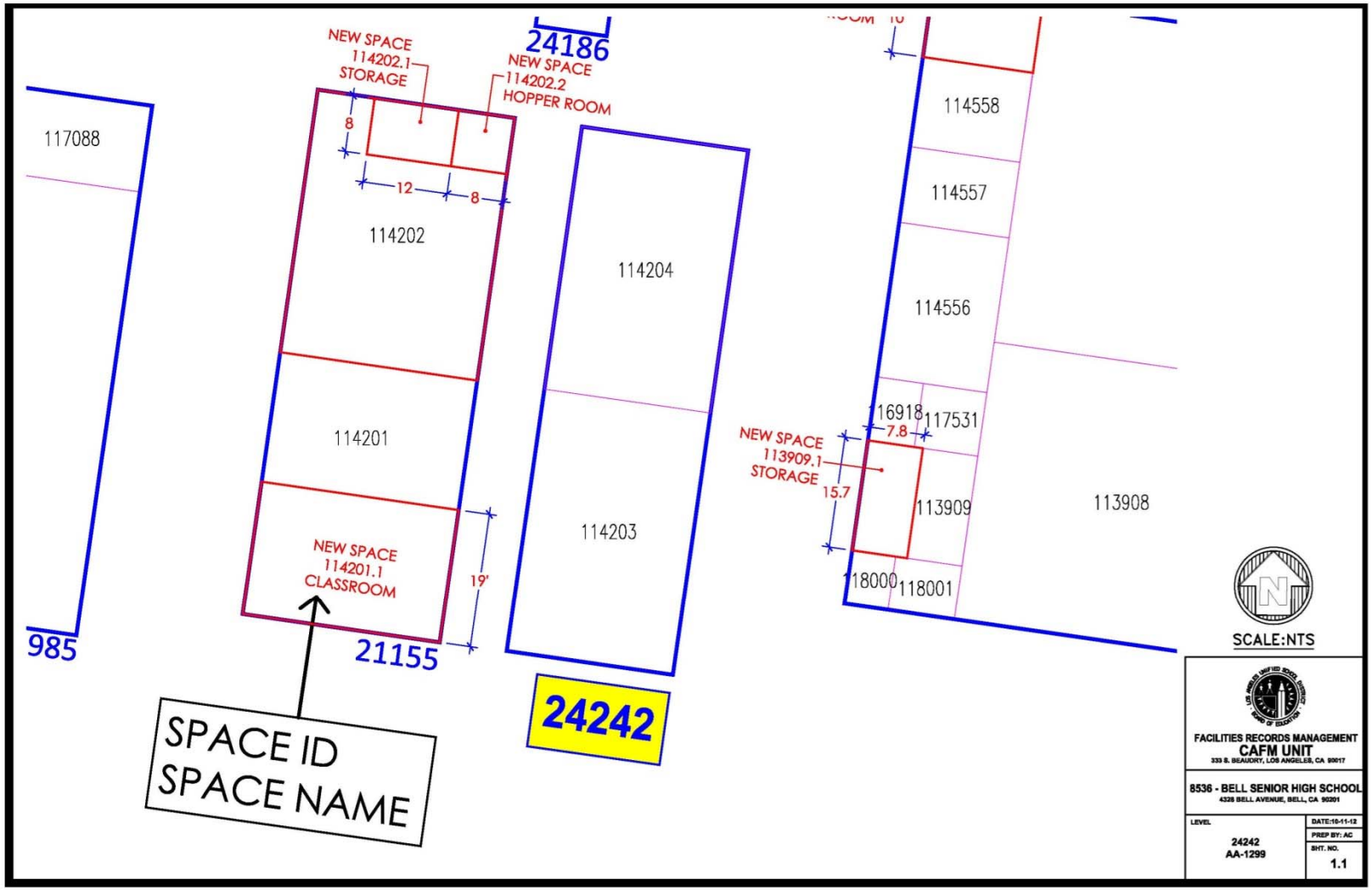
- 4 Roofers (Surveyors)
- 3 Hand Graders (Surveyors)

CAFM School Detail



Site Layout - Bell Senior High School

CAFM Building Detail

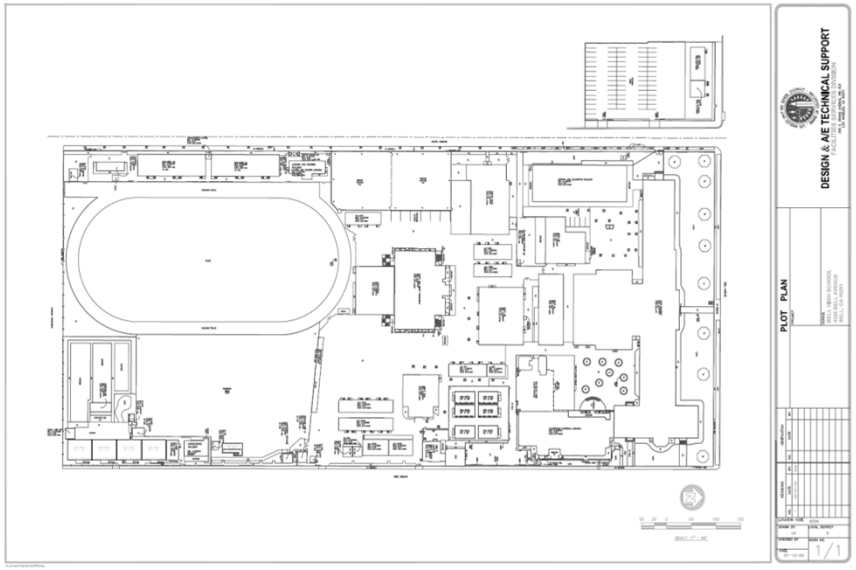


Building Detail - Bell Senior High School

Building & Site Level Attributes

VALIDATED BUILDING ATTRIBUTES

Building ID: 24242
Site Location: Bell SH
Bldg Type : Portable
Space Use: Classroom Space
Square Footage: 1,824
Year Built: 1953



VALIDATED SITE ATTRIBUTES

Site ID: 8536
Site Location: Bell SH
Site Acreage: 19.03 Acres
# of Bldgs : 21 Perm / 29 Port
Square Footage: 265,483 Perm / 37,727 Port
Avg Age of Bldgs: 55 Perm / 40 Port
Site Opened: 1926

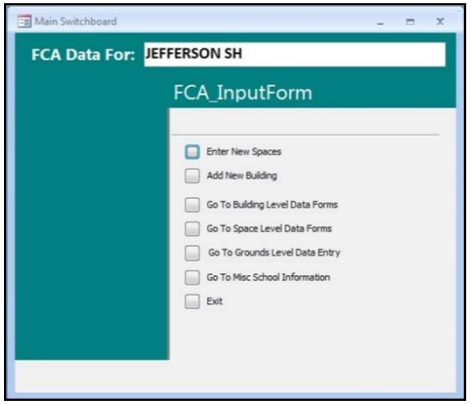
Classified Data in UNIFORMAT II

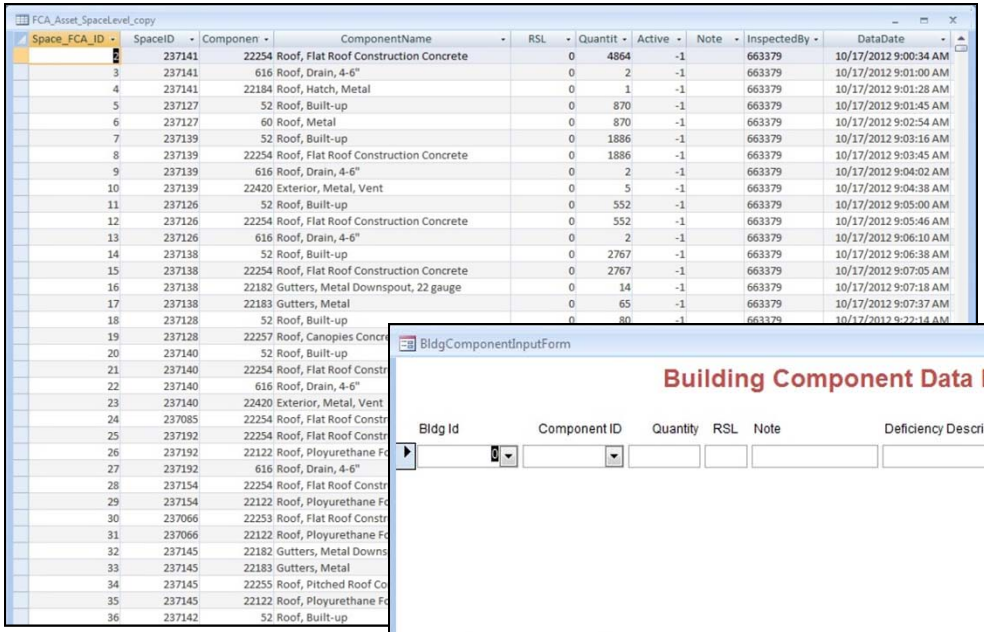
UNIFORMAT II Classification of Building Elements			
Level I Major Group Elements	**Level II Group Elements**	**Level III Elements**	**Level IV Sub-Elements**
D SERVICES	D10 Conveying	D1010 Elevators & Lifts	1690 - Crane, Jib, Electric, 2 Ton
			1051 - Elevator, Traction
			525 - Elevator, Hydraulic
			1053 - Wheel Chair Lift
	D20 Plumbing	D2010 Plumbing Fixtures	552 - Emergency Eye Wash
			22424 - Fountain, ADA Drinking, 1 Bubbler, Stainless Steel
			1871 - Sink, Cast Iron, Enamel
			22900 - Urinal, ADA Elongated for Wheelchair
			22921 - Water Closet, Tankless With Flush Valve, ADA Wall Mount 1.28 Gal
		D2020 Domestic Water Distribution	1070 - Backflow Preventer, 4"
			1996 - Ball Valve
			1873 - Pipe & Fittings, Copper 1"
			22318 - Water Heater, Gas, 100 Gal

Utilize UNIFORMAT so that Data stored in CAFM is Universal!

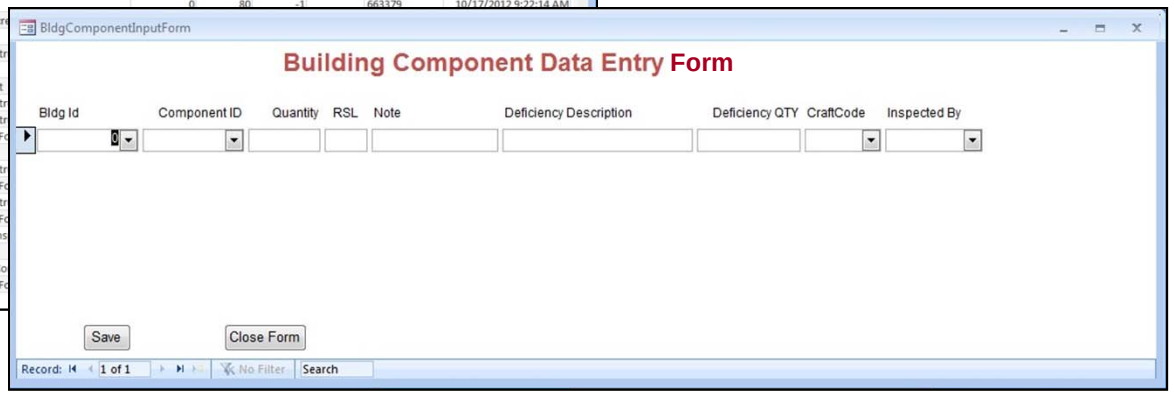
Data Collection Survey

Surveyors collect data from a library of 700 components by Location, Quantity, and Condition (RSL)





Space_FCA_ID	SpaceID	Componen	ComponentName	RSL	Quantit	Active	Note	InspectedBy	DataDate
2	237141	22254	Roof, Flat Roof Construction Concrete	0	4864	-1		663379	10/17/2012 9:00:34 AM
3	237141	616	Roof, Drain, 4-6"	0	2	-1		663379	10/17/2012 9:01:00 AM
4	237141	22184	Roof, Hatch, Metal	0	1	-1		663379	10/17/2012 9:01:28 AM
5	237127	52	Roof, Built-up	0	870	-1		663379	10/17/2012 9:01:45 AM
6	237127	60	Roof, Metal	0	870	-1		663379	10/17/2012 9:02:54 AM
7	237139	52	Roof, Built-up	0	1886	-1		663379	10/17/2012 9:03:16 AM
8	237139	22254	Roof, Flat Roof Construction Concrete	0	1886	-1		663379	10/17/2012 9:03:45 AM
9	237139	616	Roof, Drain, 4-6"	0	2	-1		663379	10/17/2012 9:04:02 AM
10	237139	22420	Exterior, Metal, Vent	0	5	-1		663379	10/17/2012 9:04:38 AM
11	237126	52	Roof, Built-up	0	552	-1		663379	10/17/2012 9:05:00 AM
12	237126	22254	Roof, Flat Roof Construction Concrete	0	552	-1		663379	10/17/2012 9:05:46 AM
13	237126	616	Roof, Drain, 4-6"	0	2	-1		663379	10/17/2012 9:06:10 AM
14	237138	52	Roof, Built-up	0	2767	-1		663379	10/17/2012 9:06:38 AM
15	237138	22254	Roof, Flat Roof Construction Concrete	0	2767	-1		663379	10/17/2012 9:07:05 AM
16	237138	22182	Gutters, Metal Downspout, 22 gauge	0	14	-1		663379	10/17/2012 9:07:18 AM
17	237138	22183	Gutters, Metal	0	65	-1		663379	10/17/2012 9:07:37 AM
18	237128	52	Roof, Built-up	0	80	-1		663379	10/17/2012 9:22:14 AM
19	237128	22257	Roof, Canopies Concr						
20	237140	52	Roof, Built-up						
21	237140	22254	Roof, Flat Roof Constr						
22	237140	616	Roof, Drain, 4-6"						
23	237140	22420	Exterior, Metal, Vent						
24	237085	22254	Roof, Flat Roof Constr						
25	237192	22254	Roof, Flat Roof Constr						
26	237192	22122	Roof, Ployurethane Fo						
27	237192	616	Roof, Drain, 4-6"						
28	237154	22254	Roof, Flat Roof Constr						
29	237154	22122	Roof, Ployurethane Fo						
30	237066	22253	Roof, Flat Roof Constr						
31	237066	22122	Roof, Ployurethane Fo						
32	237145	22182	Gutters, Metal Downs						
33	237145	22183	Gutters, Metal						
34	237145	22255	Roof, Pitched Roof Co						
35	237145	22122	Roof, Ployurethane Fo						
36	237142	52	Roof, Built-up						



Building Level Components

At this location level, Components captured for Building Number 24240 can be reviewed and help make informed decisions on what needs to be replaced or deferred

Component ID	Component Name	Uniformat	Uniformat Name	Qty	Measure	Freq	Wgtd Avg RSL	RSL perc Left	Curr Repl Cost
22453	Exterior, Skirting	A1010	Standard Foundations	200	Sq Ft	25	15	60%	$2,000.00
103	Exterior, Stucco	B2010	Exterior Walls	2,400	Sq Ft	75	40	53%	$32,400.00
22031	Exterior, Painted Surfaces	B2010	Exterior Walls	2,600	Sq Ft	8	5	63%	$2,600.00
1444	Windows, Wood Frame Operable, >12 sf	B2020	Exterior Windows	12	Each	40	20	50%	$24,000.00
22395	Windows, Security Grill, Galvanized, Fixed, >12 sf	B2020	Exterior Windows	10	Each	50	40	80%	$3,500.00
22396	Windows, Security Grill, Galvanized, Openable, >12 sf	B2020	Exterior Windows	2	Each	50	40	80%	$450.00
186	Doors, Exterior, Wood, Solid Core, Painted	B2030	Exterior Doors	2	Each	25	20	80%	$2,950.00
52	Roof, Built-up	B3010	Roof Coverings	2,002	Sq Ft	30	10	33%	$14,014.00
368	Doors, Interior, Wood, Solid Core, Painted	C1020	Interior Doors	1	Each	40	30	75%	$1,500.00
22446	Concrete Exterior Stairs, Prefab Unit	C2010	Stair Construction	4	Each	60	30	50%	$300.00
1988	Walls, Wood, Interior Paneling	C3010	Wall Finishes	2,640	Sq Ft	75	50	67%	$41,184.00
22034	Walls, Painted Surfaces	C3010	Wall Finishes	2,640	Sq Ft	10	5	50%	$2,508.00
490	Flooring, Vinyl Tile 12"x12"	C3020	Floor Finishes	1,702	Sq Ft	18	15	83%	$13,956.40
501	Ceiling, Acoustical Tile 12X12	C3030	Ceiling Finishes	1,702	Sq Ft	25	20	80%	$8,271.72
733	Air Conditioner, Rooftop, Single Zone, 5 Ton	D3050	Terminal & Package Units	2	Each	22	5	23%	$24,000.00
1851	Electrical, Panel, <= 200a	D5010	Electrical Service & Distribution	1	Each	30	15	50%	$5,500.00
1076	Exterior, Metal Halide Lighting Fixture, Wall Mount, 150 w	D5020	Lighting & Branch Wiring	1	Each	20	0	0%	$500.00
1249	Lighting, Incandescent, Surface	D5020	Lighting & Branch Wiring	48	Each	20	15	75%	$4,264.80
1482	Fire, Alarm Horn & Strobe	D5030	Communications & Security	2	Each	20	10	50%	$650.00
1741	Public Address, Intercom Speaker	D5030	Communications & Security	2	Each	20	7	35%	$600.00
1747	Security, Intrusion Detection Motion Detector, Interior	D5030	Communications & Security	2	Each	10	10	100%	$780.00
1790	Public Address, Intercom Hand Set	D5030	Communications & Security	2	Each	7	7	100%	$1,110.00
22378	Clock, Synchronous	D5030	Communications & Security	1	Each	15	10	67%	$300.00
22381	Network, Outlet Assembly	D5030	Communications & Security	12	Each	15	10	67%	$900.00
22133	Casework, Cabinet, Full Height, Shelving or Closet w/ Doors	E2010	Fixed Furnishings	12	Ln Ft	50	27	54%	$3,420.00
22146	Boards, White, Complete or Insert	E2010	Fixed Furnishings	6	Each	15	10	67%	$8,250.00
22148	Boards, Tack/Cork	E2010	Fixed Furnishings	3	Each	15	10	67%	$4,125.00

Space Level Components

At the space level, the inventory can be used to identify replacements in specific environments and target components that directly affect the classroom

Space ID	Space Name	Component ID	Component Name	Uniformat	Uniformat Name	Qty	Measure	Freq	RSL	RSL perc Left	Curr Repl Cost
114203	GENERAL CLASSROOM	22395	Windows, Security Grill, Galvanized, Fixed, >12 sf	B2020	Exterior Windows	5	Each	50	40	80%	$1,750.00
114203	GENERAL CLASSROOM	22396	Windows, Security Grill, Galvanized, Openable, >12 sf	B2020	Exterior Windows	1	Each	50	40	80%	$225.00
114203	GENERAL CLASSROOM	1444	Windows, Wood Frame Operable, >12 sf	B2020	Exterior Windows	6	Each	40	20	50%	$12,000.00
114203	GENERAL CLASSROOM	368	Doors, Interior, Wood, Solid Core, Painted	C1020	Interior Doors	1	Each	40	30	75%	$1,500.00
114203	GENERAL CLASSROOM	22034	Walls, Painted Surfaces	C3010	Wall Finishes	1,320	Sq Ft	10	5	50%	$1,254.00
114203	GENERAL CLASSROOM	1988	Walls, Wood, Interior Paneling	C3010	Wall Finishes	1,320	Sq Ft	75	50	67%	$20,592.00
114203	GENERAL CLASSROOM	490	Flooring, Vinyl Tile 12"x12"	C3020	Floor Finishes	851	Sq Ft	18	15	83%	$6,978.20
114203	GENERAL CLASSROOM	501	Ceiling, Acoustical Tile 12X12	C3030	Ceiling Finishes	851	Sq Ft	25	20	80%	$4,135.86
114203	GENERAL CLASSROOM	1249	Lighting, Incandescent, Surface	D5020	Lighting & Branch Wiring	24	Each	20	15	75%	$2,132.40
114203	GENERAL CLASSROOM	1482	Fire, Alarm Horn & Strobe	D5030	Communications & Security	1	Each	20	15	75%	$325.00
114203	GENERAL CLASSROOM	1747	Security, Intrusion Detection Motion Detector, Interior	D5030	Communications & Security	1	Each	10	10	100%	$390.00
114203	GENERAL CLASSROOM	22381	Network, Outlet Assembly	D5030	Communications & Security	6	Each	15	10	67%	$450.00
114203	GENERAL CLASSROOM	1790	Public Address, Intercom Hand Set	D5030	Communications & Security	1	Each	7	7	100%	$555.00
114203	GENERAL CLASSROOM	1741	Public Address, Intercom Speaker	D5030	Communications & Security	1	Each	20	7	35%	$300.00
114203	GENERAL CLASSROOM	22148	Boards, Tack/Cork	E2010	Fixed Furnishings	2	Each	15	10	67%	$2,750.00
114203	GENERAL CLASSROOM	22146	Boards, White, Complete or Insert	E2010	Fixed Furnishings	3	Each	15	10	67%	$4,125.00
114203	GENERAL CLASSROOM	22133	Casework, Cabinet, Full Height, Shelving or Closet w/ Doors	E2010	Fixed Furnishings	8	Ln Ft	50	20	40%	$2,280.00
114204	GENERAL CLASSROOM	22395	Windows, Security Grill, Galvanized, Fixed, >12 sf	B2020	Exterior Windows	5	Each	50	40	80%	$1,750.00
114204	GENERAL CLASSROOM	22396	Windows, Security Grill, Galvanized, Openable, >12 sf	B2020	Exterior Windows	1	Each	50	40	80%	$225.00
114204	GENERAL CLASSROOM	1444	Windows, Wood Frame Operable, >12 sf	B2020	Exterior Windows	6	Each	40	20	50%	$12,000.00
114204	GENERAL CLASSROOM	186	Doors, Exterior, Wood, Solid Core, Painted	B2030	Exterior Doors	2	Each	25	20	80%	$2,950.00
114204	GENERAL CLASSROOM	22034	Walls, Painted Surfaces	C3010	Wall Finishes	1,320	Sq Ft	10	5	50%	$1,254.00
114204	GENERAL CLASSROOM	1988	Walls, Wood, Interior Paneling	C3010	Wall Finishes	1,320	Sq Ft	75	50	67%	$20,592.00
114204	GENERAL CLASSROOM	490	Flooring, Vinyl Tile 12"x12"	C3020	Floor Finishes	851	Sq Ft	18	15	83%	$6,978.20
114204	GENERAL CLASSROOM	501	Ceiling, Acoustical Tile 12X12	C3030	Ceiling Finishes	851	Sq Ft	25	20	80%	$4,135.86
114204	GENERAL CLASSROOM	1837	Electrical, Power Panel Board	D5010	Electrical Service & Distribution	1	Each	30	15	50%	$5,500.00
114204	GENERAL CLASSROOM	1249	Lighting, Incandescent, Surface	D5020	Lighting & Branch Wiring	24	Each	20	15	75%	$2,132.40
114204	GENERAL CLASSROOM	1482	Fire, Alarm Horn & Strobe	D5030	Communications & Security	1	Each	20	5	25%	$325.00
114204	GENERAL CLASSROOM	1747	Security, Intrusion Detection Motion Detector, Interior	D5030	Communications & Security	1	Each	10	10	100%	$390.00
114204	GENERAL CLASSROOM	22381	Network, Outlet Assembly	D5030	Communications & Security	6	Each	15	10	67%	$450.00
114204	GENERAL CLASSROOM	1790	Public Address, Intercom Hand Set	D5030	Communications & Security	1	Each	7	7	100%	$555.00
114204	GENERAL CLASSROOM	1741	Public Address, Intercom Speaker	D5030	Communications & Security	1	Each	20	7	35%	$300.00
114204	GENERAL CLASSROOM	22378	Clock, Synchronous	D5030	Communications & Security	1	Each	15	10	67%	$300.00
114204	GENERAL CLASSROOM	22133	Casework, Cabinet, Full Height, Shelving or Closet w/ Doors	E2010	Fixed Furnishings	4	Ln Ft	50	40	80%	$1,140.00
114204	GENERAL CLASSROOM	22148	Boards, Tack/Cork	E2010	Fixed Furnishings	1	Each	15	10	67%	$1,375.00
114204	GENERAL CLASSROOM	22146	Boards, White, Complete or Insert	E2010	Fixed Furnishings	3	Each	15	10	67%	$4,125.00
241685	ROOF	52	Roof, Built-up	B3010	Roof Coverings	2,002	Sq Ft	30	10	33%	$14,014.00
241685	ROOF	733	HVAC, Rooftop, Single Zone Package Unit, 5 Ton	D3050	Terminal & Package Units	2	Each	22	5	23%	$24,000.00
24242	BUILDING	22453	Exterior, Skirting	A1010	Standard Foundations	200	Sq Ft	15	25	60%	$2,000.00
24242	BUILDING	103	Exterior, Stucco	B2010	Exterior Walls	2,400	Sq Ft	40	75	53%	$32,400.00
24242	BUILDING	22031	Exterior, Painted Surfaces	B2010	Exterior Walls	2,600	Sq Ft	5	8	63%	$2,600.00
24242	BUILDING	1076	Exterior, Metal Halide Lighting Fixture, Wall Mount, 150 w	D5020	Lighting & Branch Wiring	1	Each	0	20	0%	$500.00
24242	BUILDING	22446	Concrete Exterior Stairs, Prefab Unit	C2010	Stair Construction	4	Each	30	60	50%	$300.00

FCA Survey Sheet

School Name: _____ Space Name: _____ Date:_____

Building Id:_____ Space Id:_____ Surveyor:_____ Entered by:_____

Component Name	Component ID	Freq	Qty	Measure	RSL	Notes
Ceiling						
Ceiling, Acoustical Tile, Dropped	502	70		Sq Ft		
Ceiling, Acoustical Tile 12X12	501	25		Sq Ft		
Ceiling, Acoustical Tile 12X12, Over Plaster	22759	25		Sq Ft		
Flooring						
Flooring, Concrete	493	75		Sq Ft		
Flooring, Carpet, Nylon	485	8		Sq Ft		
Flooring, Ceramic Tile	471	50		Sq Ft		
Walls						
Interior Walls, Acoustical Tile	1989	60		Sq Ft		
Interior Walls, Ceramic Tile, 4"x4"	435	75		Sq Ft		
Interior Walls, Clay Brick	432	75		Sq Ft		
Windows						
Windows, Aluminum Fixed, <12 sf	239	75		Each		
Windows, Glass Block	1546	75		Sq Ft		
Windows, Security Grill, Galvanized, Fixed, <12 sf	22174	50		Each		
Doors						
Exterior Doors, Metal Fire Rolling Door, Fusible Link	22721	75		Each		
Exterior Doors, Steel, Painted	171	75		Each		
Exterior Doors, Wood, Metal Covered (Computer Room)	22864	40		Each		

Room Survey

CAFM Update

FCA Component data is assigned to:

- CAFM Space Level – for components in rooms
- CAFM Building Level – for components on the exterior but attached
- CAFM Grounds Level – for components not attached to buildings

Challenges

- Consistency
- Accuracy
- Dynamic data
- Schools in Session

Garbage In

Garbage Out

Approach

- Standardize
- Continuous training
- Documentation
- Team building
- Multi-tiered collaboration for data update
- Technology
- Be innovative

FCA Benefits

- Updated facilities data
- Decision-making tool for Capital Investment
- Deferred Maintenance Plan
- Preventive Maintenance
- Project Development

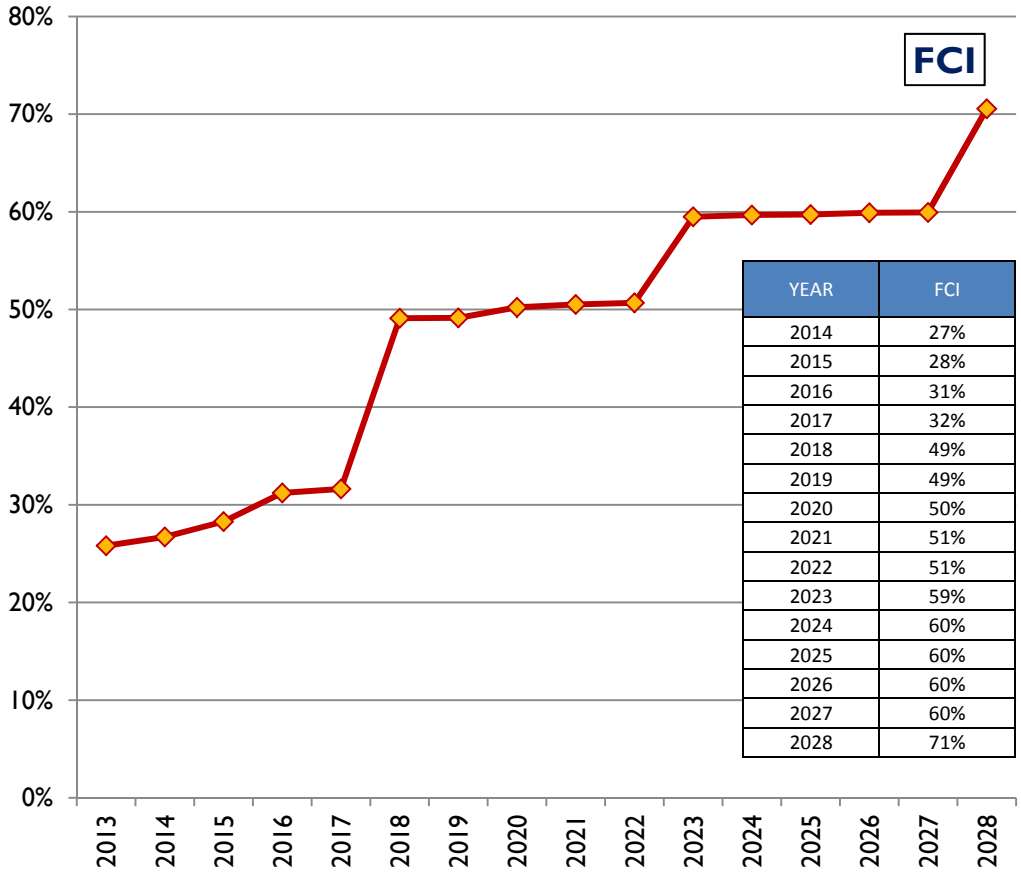
Define Strategic Goals

*Common Industry Standards

FCI VALUE	ASSET CONDITION
0-5%	*Good*
6-10%	*Fair*
11-30%	*Poor*
Above 30%	*Critical*

** Source: 'Managing the Facilities Portfolio' A Practical Approach to Institutional Facility Renewal and Deferred Maintenance*

Increase in FCI
when no money is spent



YEAR	FCI
2014	27%
2015	28%
2016	31%
2017	32%
2018	49%
2019	49%
2020	50%
2021	51%
2022	51%
2023	59%
2024	60%
2025	60%
2026	60%
2027	60%
2028	71%

Any Questions?

California Community Colleges

Facilities Utilization, Space Inventory Options Net (*FUSION*)

Frederick E. Harris, Assistant Vice Chancellor
College Finance and Facilities Planning
California Community Colleges Chancellor's Office

California Community Colleges

Systemwide Detail

- **72 districts encompassing 112 colleges, 72 approved off-campus centers and 23 separately reported district offices**
- **24,398 acres of land, 5,281 buildings, and 75.6 million square feet of space**
- **2.4 million students annually**
  - **75% of the state's public undergraduate students**
  - **25% of community college students nationwide**

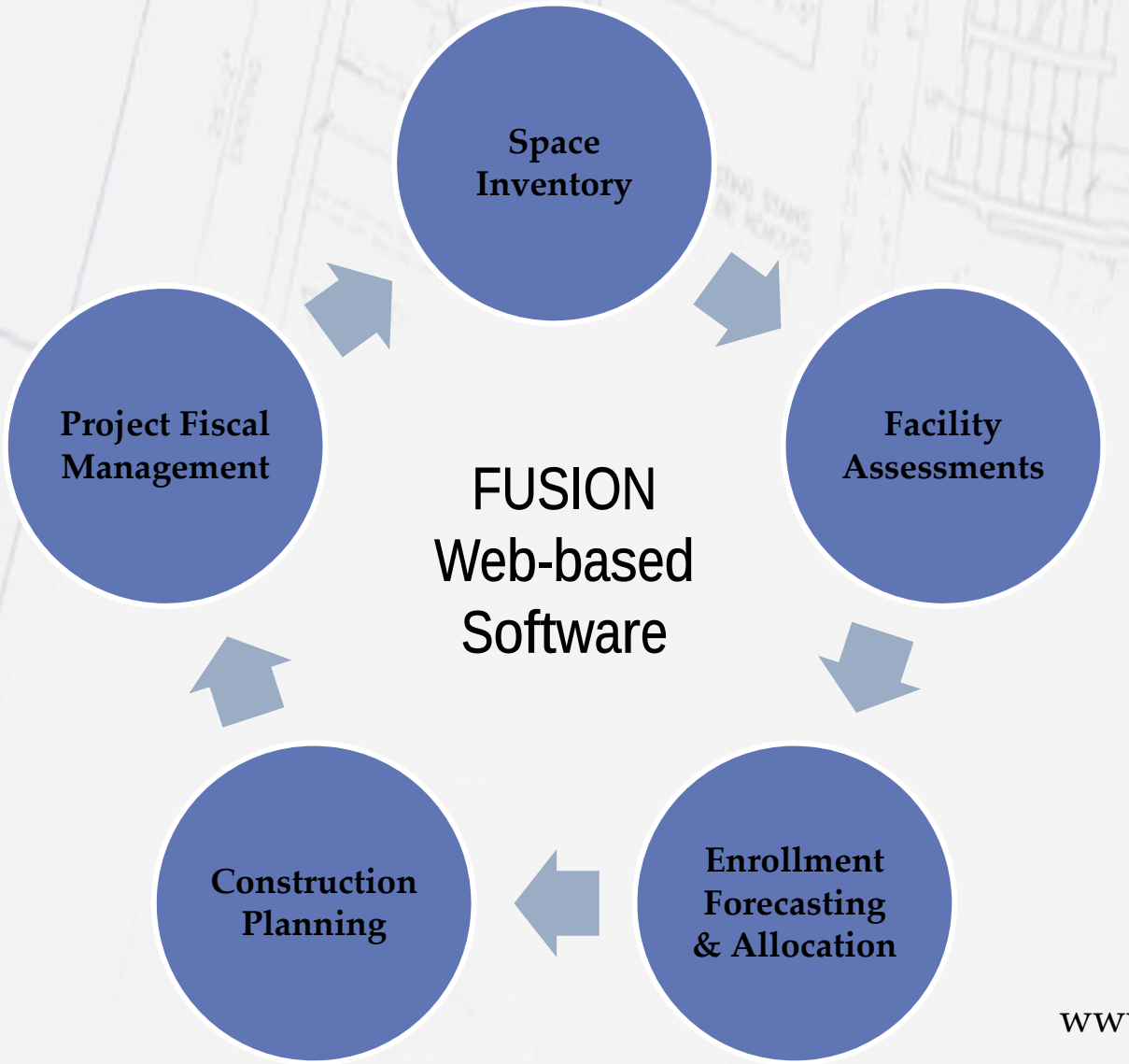
California Community Colleges
Systemwide Facilities Needs

- **10-year Facilities Needs = *$35.8 billion***
- **Enrollment Growth Needs = *18.5 million* new sq ft**
- **Modernization Needs = *27.3 million* existing sq ft**
  - **67% of buildings: over 25 years old**
  - **46% of buildings: over 40 years old**

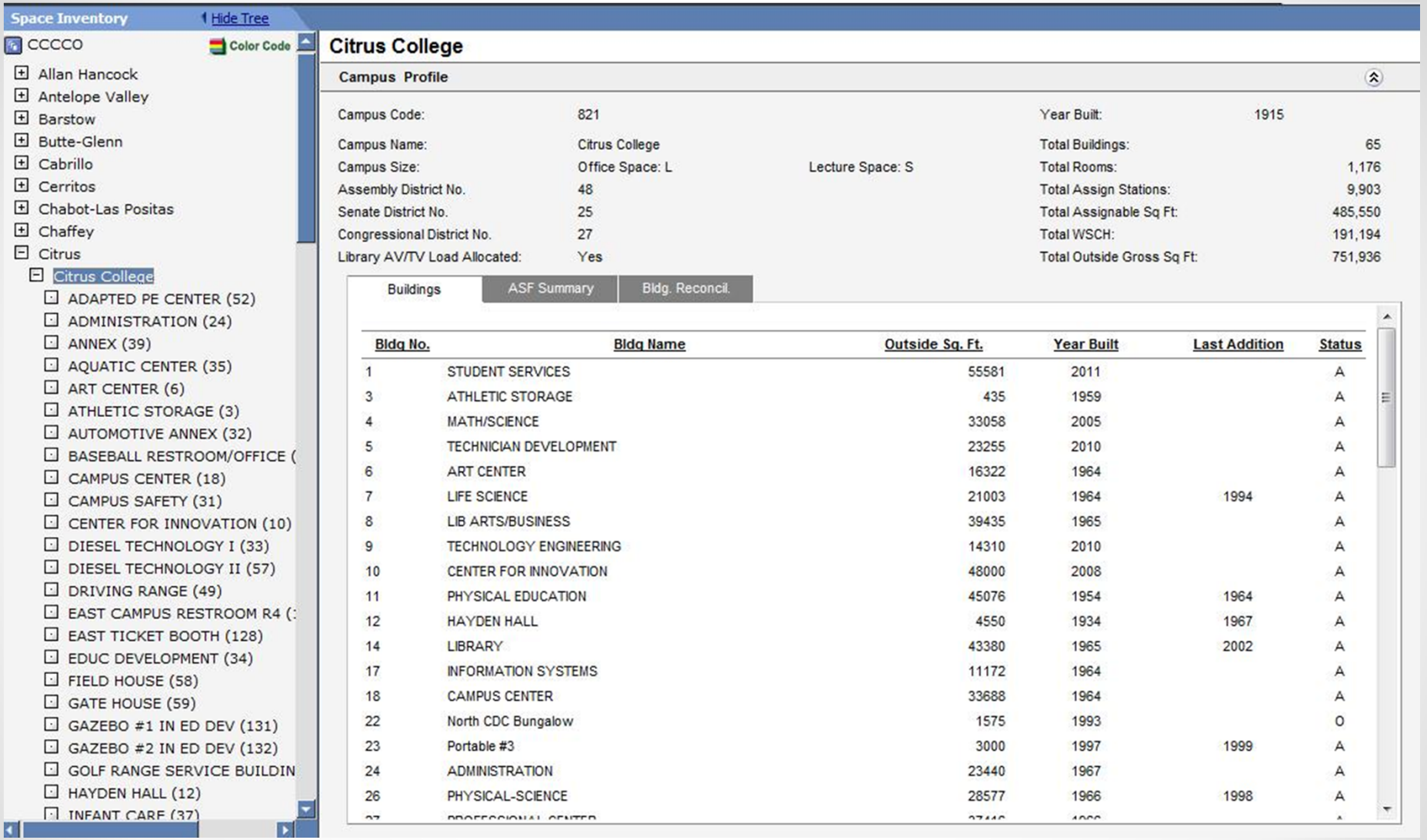
FUSION is… *Collaboration*

- **Online suite of tools used by all 72 community colleges to manage 75,000,000 sq.ft. of facilities**
- **One-of-a-kind tool for California Community Colleges owned by all 72 districts**
- **Staffed and maintained by the Foundation for California Community Colleges**
- **Computer servers hosted on the San Joaquin Delta College campus in Stockton, CA**

FUSION is Online & Modules are Integrated



www.cccfusion.org



Bldg No.	Bldg Name	Outside Sq. Ft.	Year Built	Last Addition	Status
1	STUDENT SERVICES	55581	2011		A
3	ATHLETIC STORAGE	435	1959		A
4	MATH/SCIENCE	33058	2005		A
5	TECHNICIAN DEVELOPMENT	23255	2010		A
6	ART CENTER	16322	1964		A
7	LIFE SCIENCE	21003	1964	1994	A
8	LIB ARTS/BUSINESS	39435	1965		A
9	TECHNOLOGY ENGINEERING	14310	2010		A
10	CENTER FOR INNOVATION	48000	2008		A
11	PHYSICAL EDUCATION	45076	1954	1964	A
12	HAYDEN HALL	4550	1934	1967	A
14	LIBRARY	43380	1965	2002	A
17	INFORMATION SYSTEMS	11172	1964		A
18	CAMPUS CENTER	33688	1964		A
22	North CDC Bungalow	1575	1993		O
23	Portable #3	3000	1997	1999	A
24	ADMINISTRATION	23440	1967		A
26	PHYSICAL-SCIENCE	28577	1966	1998	A

Facility Condition Assessments

Major Features

- Three-year rotating cycle to assess all 72 districts
- Lead assessor works for the Foundation for CCCs
- Local district control of what is assessed
- Uniform standards for assessment & cost modeling

Benefits

- Improved accuracy
- Useful both locally & statewide
- Instrumental in gaining $3.5 billion in state & $26 billion in local bonds in last decade
- Improved tracking and reporting

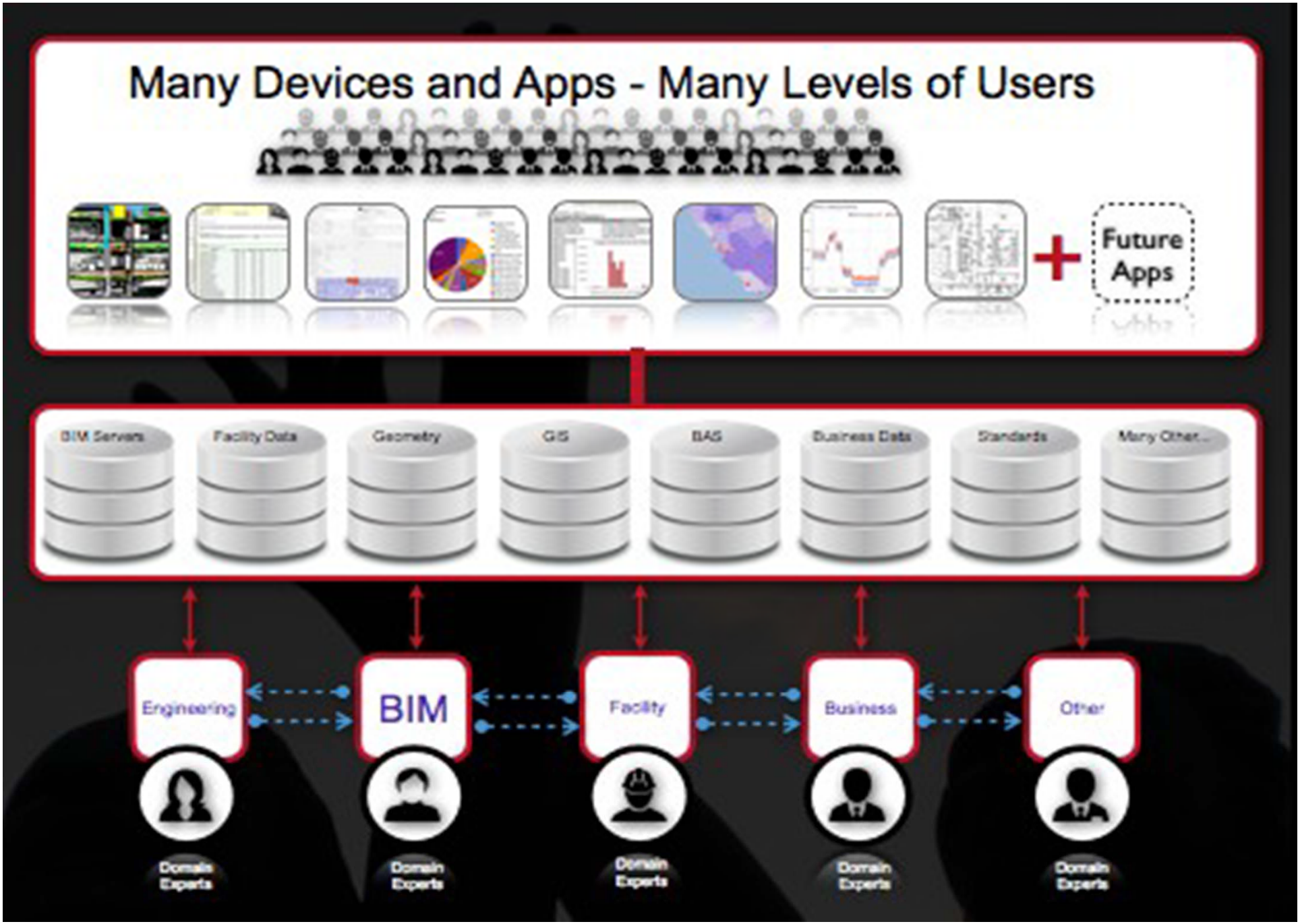
FUSION Benefit to Districts

- Organize facilities data in one place
- Ability to roll up data from site to district
- Assists in planning
  - o Needs for modernization
  - o Deferred maintenance
- Provides "cost to fix" information
  - o *i.e.*, modernize vs. drop & replace
- Assists in Closeout Process
  - o Reduce # of uncertified projects at DSA

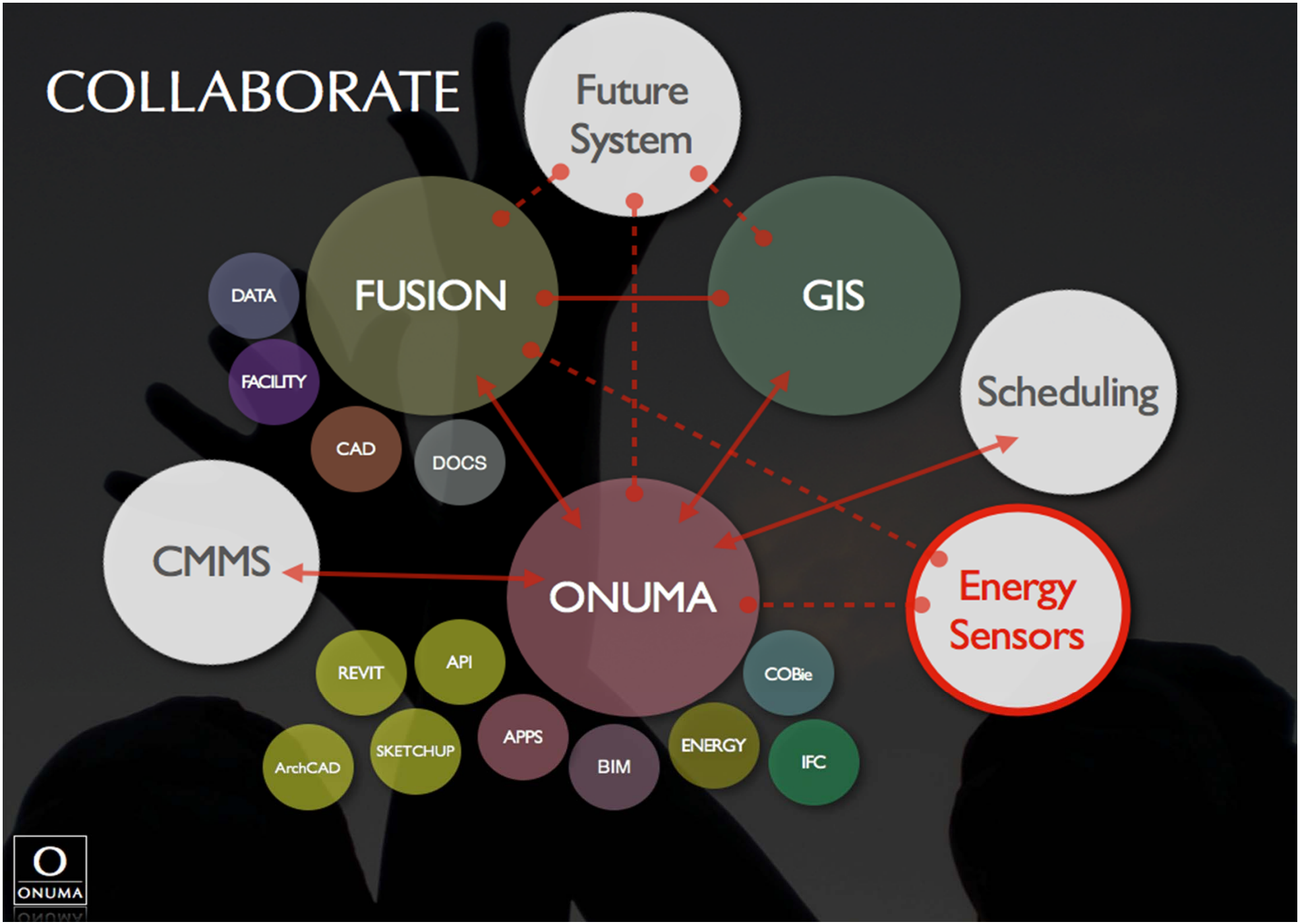
26s

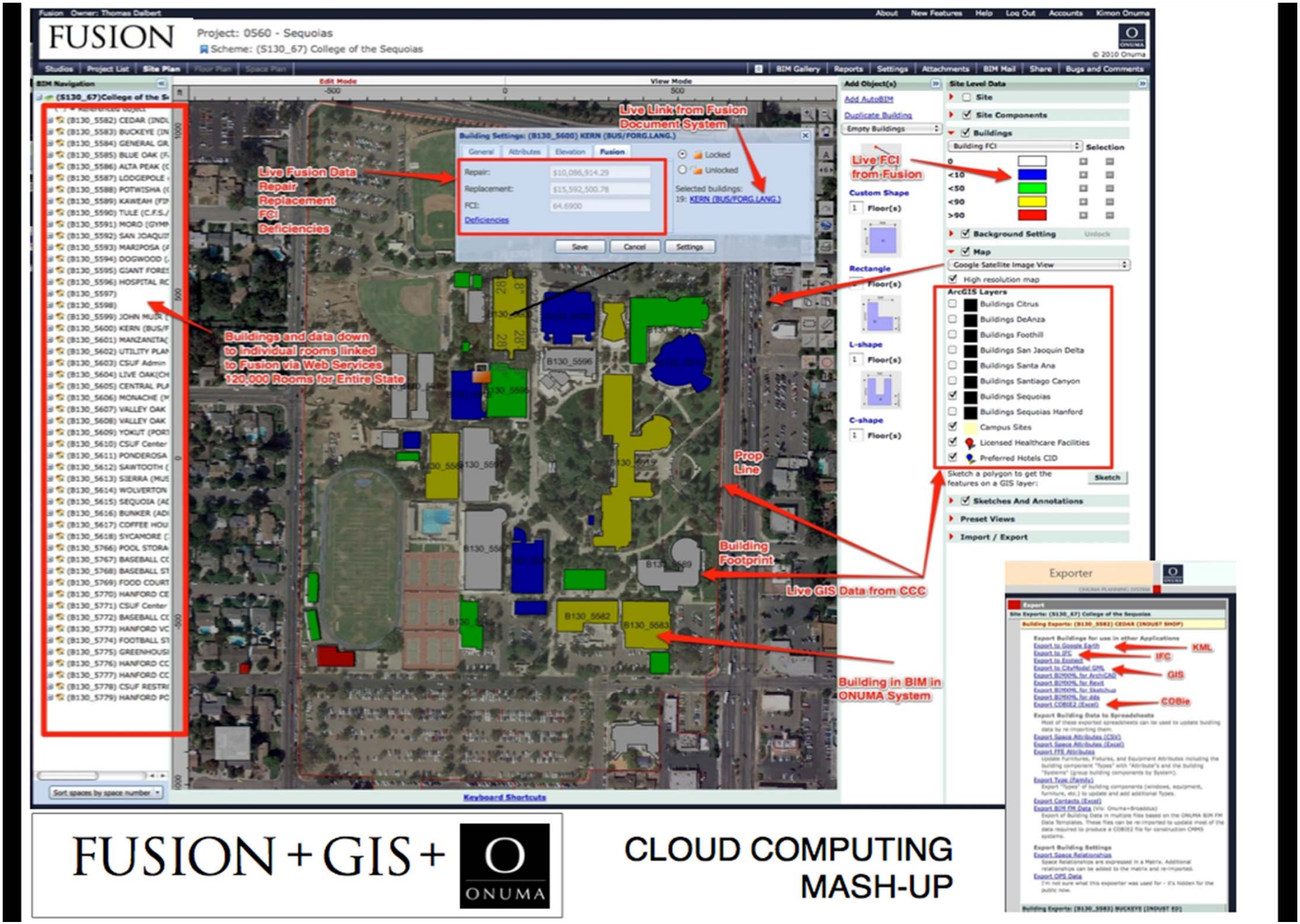

What is
Next?


ONE
DATABASE


Many Devices and Apps - Many Levels of Users
Future Apps
BIM Servers
Facility Data
Geometry
GIS
BAS
Business Data
Standards
Many Other...
Engineering
BIM
Facility
Business
Other
Domain Experts
Domain Experts
Domain Experts
Domain Experts
Domain Experts


WEBSERVICES
ECOSYSTEM


COLLABORATE
Future System
FUSION
GIS
DATA
FACILITY
CAD
DOCS
Scheduling
CMMS
ONUMA
Energy Sensors
REVIT
API
COBie
APPS
SKETCHUP
ENERGY
ArchCAD
BIM
IFC
ONUMA


FUSION
Project: 0560 - Sequoias
Scheme: (S130_67) College of the Sequoias
Live Link from Fusion Document System
Live Fusion Data
Repair
Replacement
FCI
Deficiencies
Buildings and data down to individual rooms linked to Fusion via Web Services
120,000 Rooms for Entire State
Live FCI from Fusion
Prop Line
Building Footprint
Live GIS Data from CCC
Building in BIM in ONUMA System
Exporter
KML
IFC
GIS
COBie
FUSION + GIS +
ONUMA
CLOUD COMPUTING MASH-UP


1. Log In
2. Studios
3. Projects
4. Site
5. Building
6. Room
on iPAD and iPhone
ONUMA

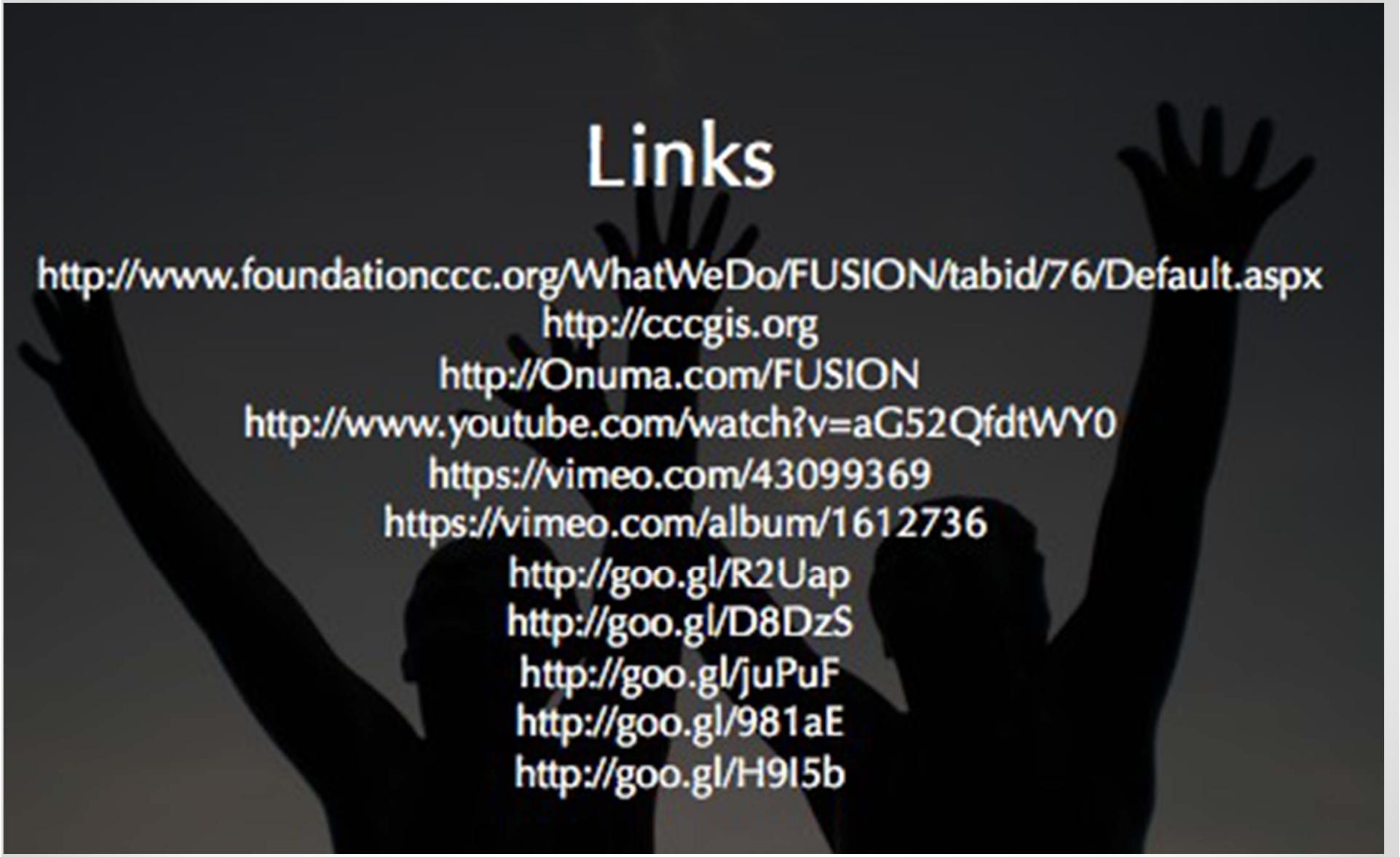
California Community Colleges & ONUMA Receive Fiatech CETI Award April 3, 2012

FIATECH CETI Award for Real-Time Project and Facility Management, Coordination, and Control.

Frederick E. Harris, Assistant Vice Chancellor, College Finance & Facilities Planning, California Community Colleges Chancellor's Office

Kimon Onuma, FAIA, President ONUMA, Inc.

John Roach
Executive Director,
Technology Services
Foundation for California
Community Colleges


Links
http://www.foundationccc.org/WhatWeDo/FUSION/tabid/76/Default.aspx
http://cccgis.org
http://Onuma.com/FUSION
http://www.youtube.com/watch?v=aG52QfdtWY0
https://vimeo.com/43099369
https://vimeo.com/album/1612736
http://goo.gl/R2Uap
http://goo.gl/D8DzS
http://goo.gl/juPuF
http://goo.gl/981aE
http://goo.gl/H9I5b

Charter School Facilities Program
New Construction & Rehabilitation

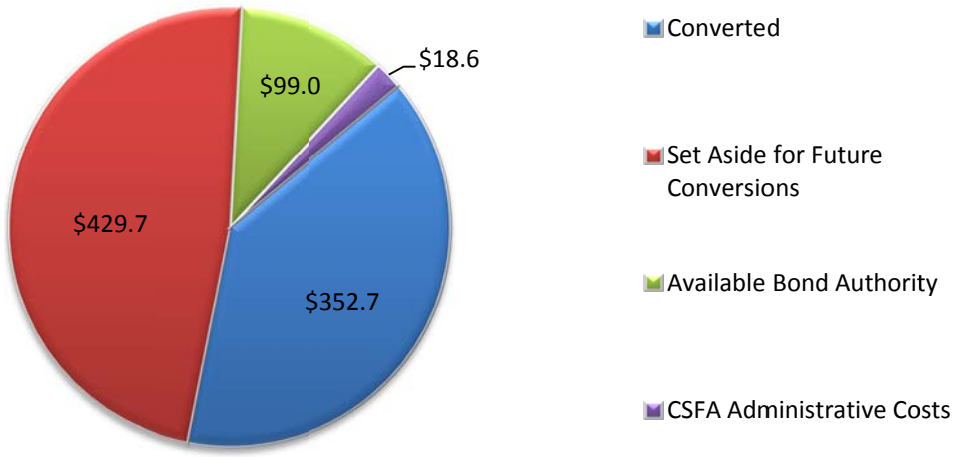
Funding Sources: Propositions 47, 55 & 1D

Purpose of Report

The goal of this item is to present data and to discuss possible changes for the Charter School Facilities Program (CSFP). Considerations have been provided as a platform for discussion.

Background

Through the passage of Propositions 47, 55 and 1D, $900 million has been made available for the new construction of charter school facilities or the rehabilitation of existing school district facilities for charter school use. The following shows a breakdown of the original $900 million that was approved by the Propositions. The $99.0 currently available is due to project rescissions and conversions under the reserved preliminary apportionment amount.



These amounts are estimates and do not account for bond authority allocated for advances for design and site acquisition.

Program Statistics

Under current program requirements, preliminary apportionments must be converted to final apportionments within 4 years, with a possible one year extension. Projects that are unable to meet the deadline are rescinded. The following charts show the conversion rate/percentages of preliminary apportionments for each filing round:

Round and Date of Preliminary Apportionment	Number of Preliminary Apportionments	Deadline to Convert to Final Apportionment	Number of Rescissions	Number of Conversions to Final Apportionment	Number Remaining Active
Proposition 47 (7/2/03)	6	7/2/08	4	2	0
Proposition 55 (2/23/05)	28	1/1/13; 7/9/13	11	17	0
Proposition 1D (5/28/08; 8/26/09)	30	5/7/15; 11/13/15	3	8	19
2009 Filing Round (5/26/10; 4/26/11; 7/12/11)	17	10/26/15; 5/2/16	1	7	9
Total	81	n/a	19	34	28

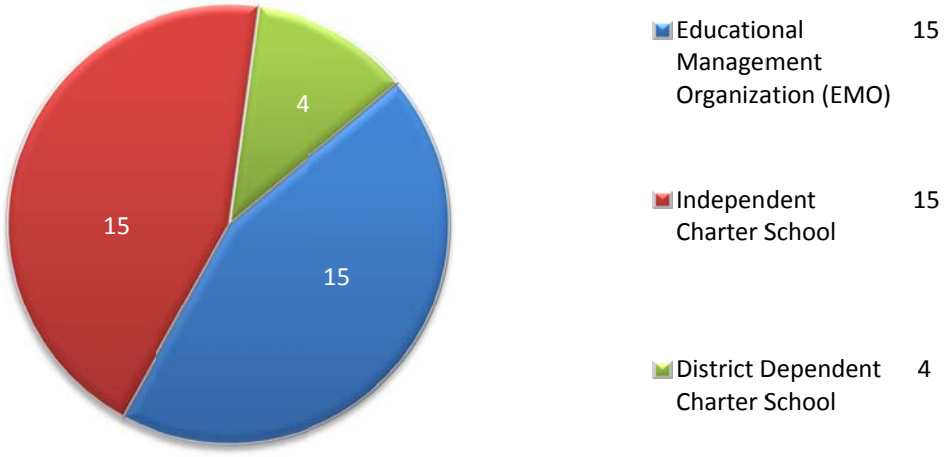
To date, 34 of 81 preliminary apportionments have converted to final apportionments, for a 41.9 percent conversion rate. However, this is not the final success rate, as 28 projects remain active. If those projects were to all convert to a final apportionment, the overall conversion rate for the program would be 76.5 percent.

Fiscal Crisis

In 2010, due to the lack of available funding, the State Allocation Board took action to freeze the conversion deadlines for all active charter preliminary apportionments. During this time, the 2009 filing round occurred. Charter school projects that received funding from this round were given Unfunded Preliminary Apportionments and were apportioned with frozen timelines. Charters that had accessed all of their available advance funding had their timelines reinstated in 2011. The rest of the charter had their timelines reinstated in May 2012 after a second advance funding round.

The average time of conversion from a preliminary apportionment to a final apportionment for successful projects is 4.63 years (this includes time that the projects were frozen). If the time period during which a project was frozen is removed, the average time of conversion is 2.89 years.

Educational Management Organizations (EMO) and independent charter schools account for the majority of projects, with district dependent charter schools accounting for the rest of applications. The following chart shows the breakdown of successful conversion applications by charter school type:

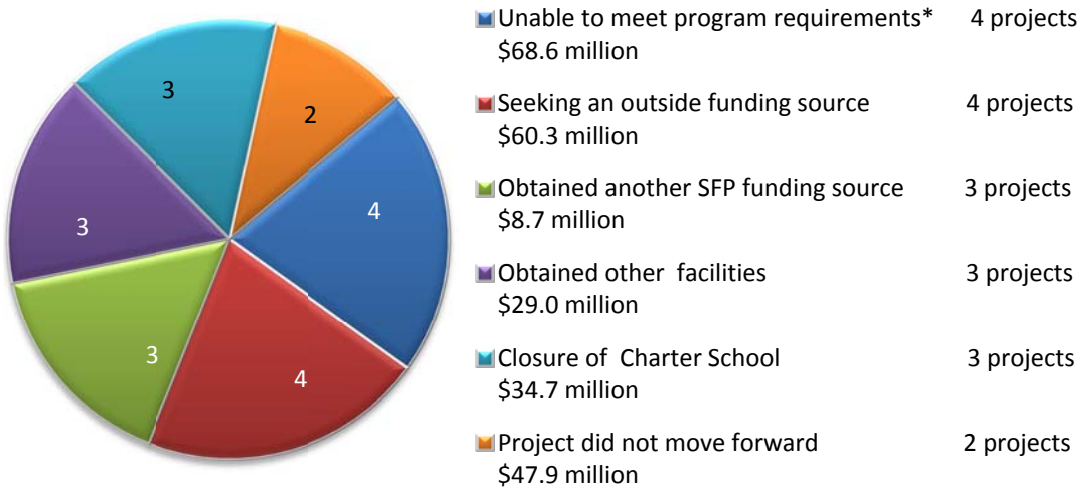


Projects can reserve a loan amount at preliminary apportionment and decide at final apportionment if the loan amount is still needed. Of those charter schools who have converted, 82.3 percent have accepted a loan from the State for some or all of the local matching share:

Status of Loan Requests at Time of Conversion

Received Full Loan	Received Partial Loan	Did Not Request Loan
25 projects	3 projects	6 projects

The reasons Charter Schools have given for rescinding their projects are as follows:



*Program requirements not met included: unable to build within district or High School Attendance Area boundaries (2 projects), lost financial soundness (1 project), and did not submit an application within the five year time limit (1 project).

Of the CSFP rescissions, nine were independent charter schools, nine were EMOs, and one a district dependent charter school.

Distribution of CSFP Bond Authority

Education Code Section 17078.56 requires that when approving applications for the CSFP, the Board shall seek to ensure that applications are representative of the different types of charter schools throughout the state, specifically the following categories:

- Different geographic regions
- Urban, rural, and suburban regions
- Large, medium, and small charter schools
- Various grade levels of pupils served

The following charts on the next two pages show the data for Preliminary Apportionments, Conversion projects, and rescissions as they relate to the categories above.

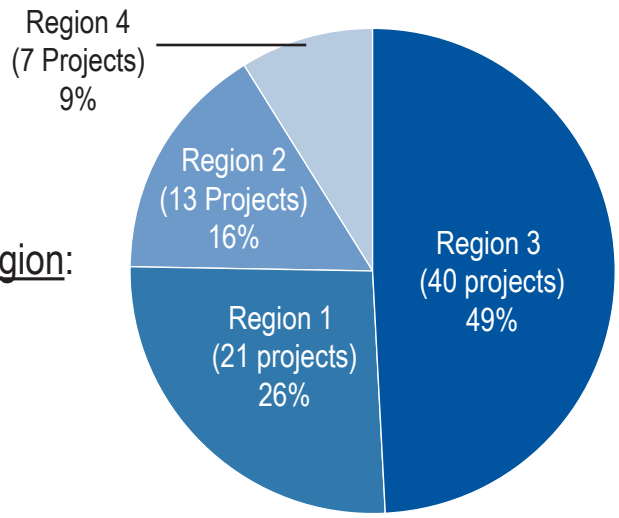
Inflator Factor

The table on page 33 shows the conversion projects from the Proposition 1D and 2009 Filing Rounds and how their final apportionments compared to the preliminary apportionments, which included an inflator factor. The inflator factor was included to account for the predicted grant increases from the time of preliminary apportionment to the time of final apportionment.

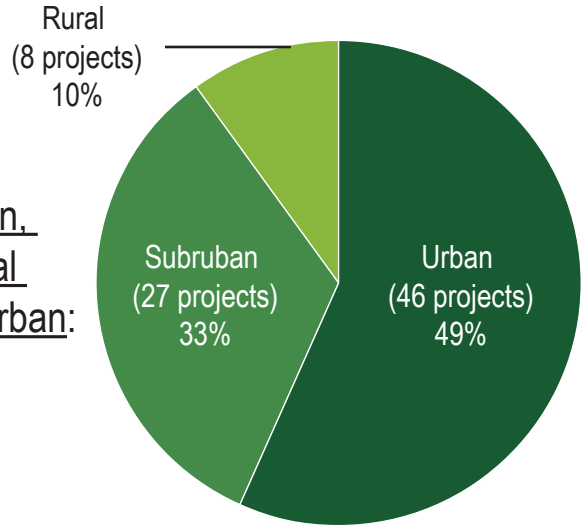
Charter School Facilities Program Demographic Data

Preliminary Apportionments:

Region:



Urban, Rural or Suburban:



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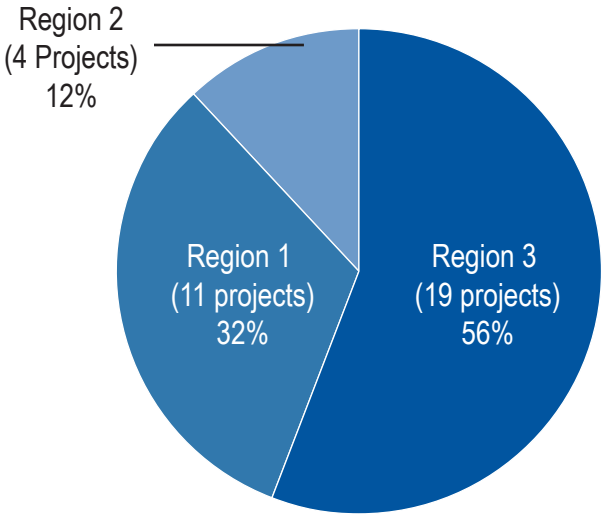

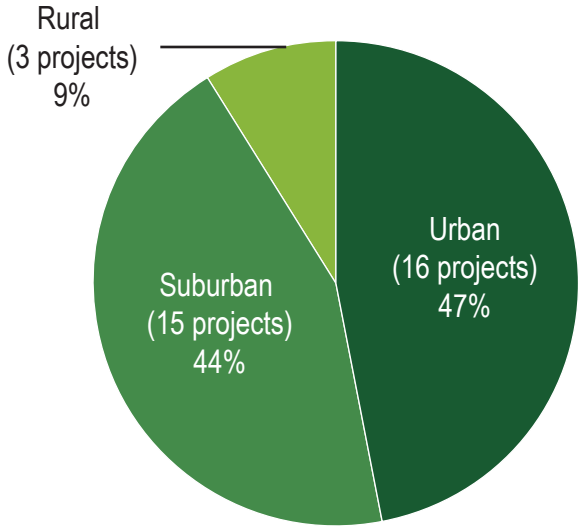

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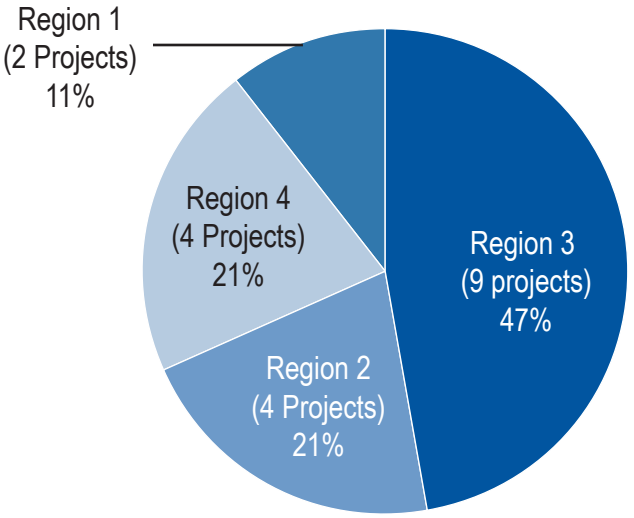
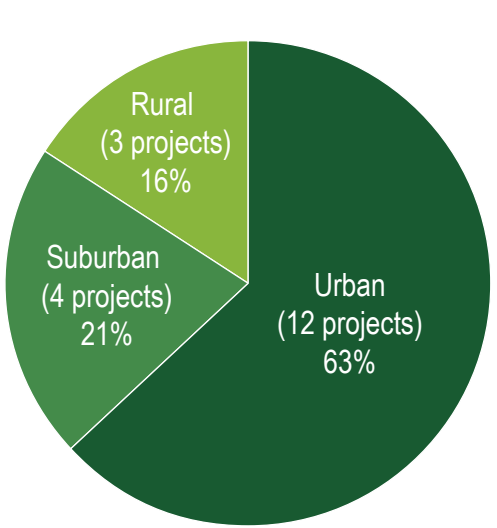
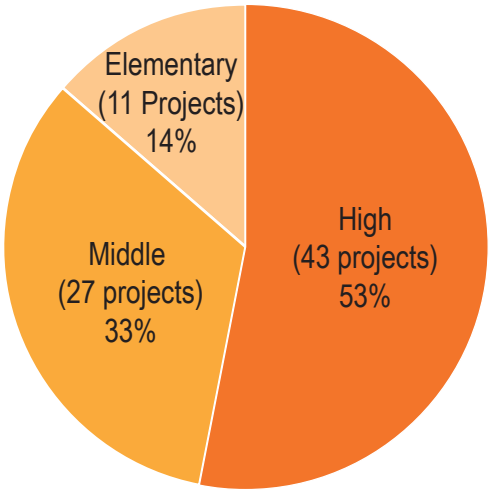




Charter School Facilities Program Demographic Data

Preliminary Apportionments:

Grade Level:



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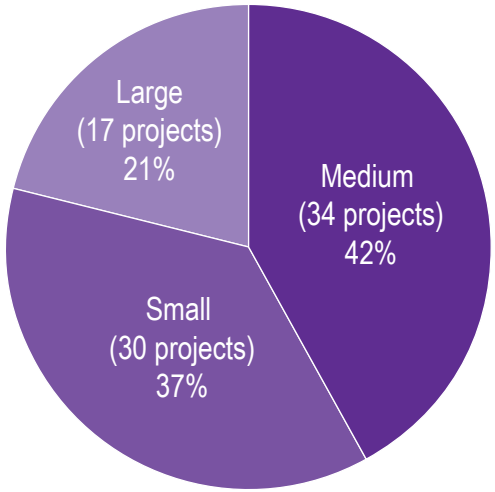

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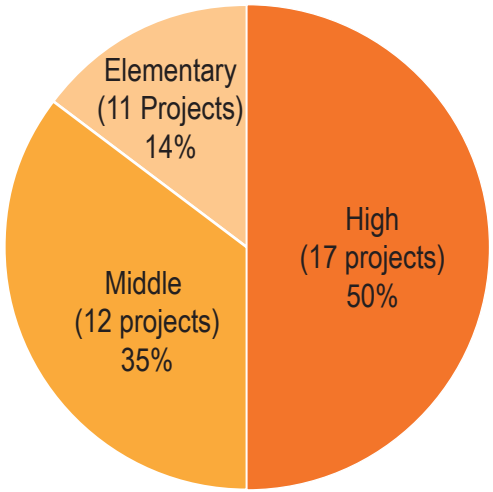

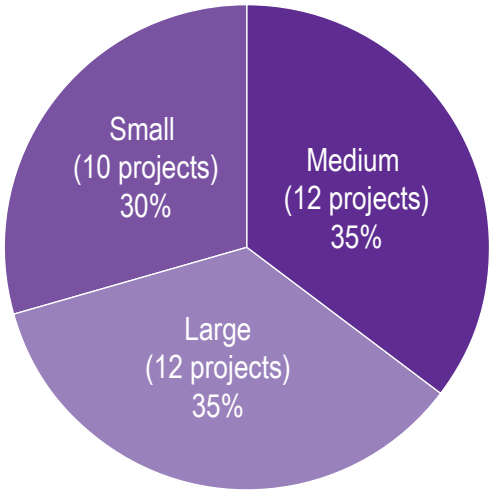

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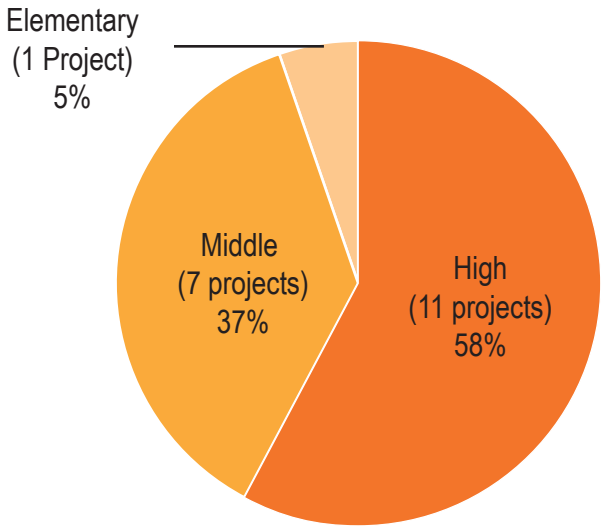

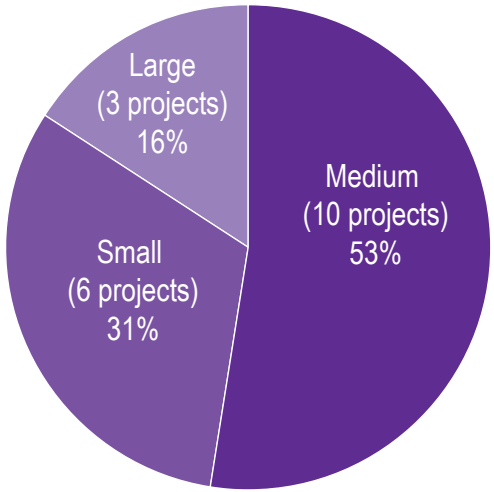

Charter School Facilities Program:
Comparison of Preliminary Apportionment and Final Apportionment/Unfunded Approvals
(Proposition 1D and 2009 Filing Round)

Application Number	School District	County	Charter School	Preliminary Apportionment without Inflator	PA Amount (Actual)	Final Apportionment (FA)/ Unfunded Approval Amnount	Difference between FA and PA (Actual)	FA: Percent-age of PA	Years from PA to FA
54/61259-00-001	Oakland Unified	Alameda	Oakland Military Institute	2,873,250	3,131,842	3,131,842 *	0	100.0%	1.42
54/64352-00-007	Centinela Valley Union High	Los Angeles	Animo Leadership High	14,716,896	15,573,416	10,200,984 *	(5,372,432)	65.5%	0.25
54/68627-00-001	New Jerusalem Elementary	San Joaquin	New Jerusalem Charter Elementary	1,382,336	1,506,746	1,159,488	(347,258)	77.0%	2.24
54/61309-00-001	San Lorenzo Unified	Alameda	KIPP King Collegiate High (NC)	8,626,464	11,041,874	8,282,844	(2,759,030)	75.0%	3.12
54/61424-00-001	Chico Unified	Butte	Chico Country Day School	6,591,454	8,437,062	7,955,650	(481,412)	94.3%	4.99
54/61796-03-001	West Contra Costa Unified	Contra Costa	Leadership Public Schools - Richmond	12,686,079	15,398,181	14,345,722 *	(1,052,459)	93.2%	4.99
54/64733-00-035	Los Angeles Unified	Los Angeles	Oscar de la Hoya Animo Los Angeles	8,451,364	10,817,746	9,967,216	(850,530)	92.1%	1.00
54/64733-00-056	Los Angeles Unified	Los Angeles	Vaughn Next Century Learning Center	5,755,565	6,219,925	4,382,251	(1,837,674)	70.5%	1.99
54/64733-00-058	Los Angeles Unified	Los Angeles	Camino Nuevo Charter High School	23,487,572	26,409,520	22,251,334	(4,158,186)	84.3%	4.55
54/69179-00-002	College Elementary	Santa Barbara	Santa Ynez Valley Charter (Rehab)	567,639	726,578	721,601	(4,977)	99.3%	2.92
54/75044-00-002	Hesperia Unified	San Bernardino	Pathways to College Charter School	7,051,894	8,837,944	5,337,172 *	(3,500,772)	60.4%	4.99
				$ 92,190,513	$ 108,100,834	$ 87,736,104	$ (20,364,730)		

Percentage of Preliminary Apportionment 81.16%
Average Conversion Time in Years: 2.95

Conversions average 81.2 percent of the total Preliminary Apportionment.
The Final Apportionments range from 100 to 60.39 percent of the actual Preliminary Apportionments

*Amount does not include the High Performance Incentive grant.

Conditions Specific to Each Proposition

Assembly Bill 14 (Chapter 935, Statutes of 2002, Goldberg) created a pilot program within the existing State SFP that allows the State Allocation Board (SAB) to provide funding for the new construction of charter school facilities. Within Proposition 47, approved by the voters in November 2002, $100 million was made available for the CSFP. Total project costs allowed for six charter school projects to receive preliminary apportionments.

Senate Bill 15 (Chapter 587, Statues of 2003, Alpert) modified the Program to address some of the concerns raised after the first round of funding. Changes made included the placement of a cap on project costs at the time of preliminary apportionment. With the passage of Proposition 55, approved by the voters in 2005, an additional $300 million was made available for the CSFP. SFP regulation changes later allowed for additional eligible funding amounts for projects at the time of conversion to a final apportionment.

Assembly Bill 127 (Chapter 35, Statutes of 2006, Nunez) further modified the program. The funding cap for project costs was removed. The option of rehabilitating existing district facilities was also added into law, making CSFP rehabilitation projects eligible for the first time. With the addition of the rehabilitation component, this statute also added rehabilitation projects as a type of project that received preference in funding. With the passage of Proposition 1D in 2006, an additional $500 million was made available for the CSFP.

In 2009, a fourth filing round was created using the unused and returned funds from Proposition 47 and 1D. This round followed the same requirements as Proposition 1D. The projects were approved during the fiscal crisis and received Unfunded Preliminary Apportionments.

Other changes have been made within the CSFP and School Facility Program that have affected charter schools with preliminary apportionments:

- The passage of Senate Bill 592 – Charter School Facilities Program in 2010 allowed charter schools to hold title to project facilities. This allowed charter schools to advance with their projects and enter into the Charter School Agreements with the State without participation from the district.
- On December 8, 2010 all timelines to convert were frozen due to the fiscal crisis, and funds were no longer readily available for advances and conversions.
- Charter schools with preliminary apportionments were unable to access advance funding after the onset of the fiscal crisis in December 2008 until process changes occurred in December 2010 that allowed them to participate in SFP Priority Funding rounds.

California Charter Schools Association

1107 9th Street, Suite 200 • Sacramento, CA 95814 • p 916-448-0995 • f 916-448-0998 • www.calcharters.org

Charter School Facilities

State Level Facilities Funding Programs

Charter School Facilities Program (State bond): A $900 million program that provides low-cost financing for charter school facilities; fifty percent grant, fifty percent loan. Funds both new construction and rehabilitation of existing school facilities.

Charter School Facility Grant Program (SB 740): A grant program that provides annual assistance with facilities rent and lease expenditures for charter schools that meet specific eligibility criteria. Precludes charter schools who lease district facilities from receiving reimbursement, even when they are leasing at market value.

Charter School Facilities Credit Enhancement Grant Program: An $8.3 million program that serves to fund debt service reserves for the financing of acquisition, renovation, or construction of charter school facilities, or the refinancing of existing charter school facility debt.

Federal Level Facilities Funding Programs

State Charter School Facilities Incentive Grants Program: A federal grant program designed to assist California charter schools in meeting their facility needs.

Local Level Facilities Funding Programs

Proposition 39: Passed by voters in 2000, requires that public school facilities be shared fairly among all public school pupils, including those in charter schools. There are very specific regulations that school districts and charter schools must meet under Proposition 39.

Local bonds: Local school districts that run bond acts for their school facilities needs have the option of including charters in those bonds. For example, San Diego included charter schools in their 2012 bond, Proposition Z. San Diego Unified School District created a Charter School Facility Committee for the purpose of providing recommendations concerning acquisition, construction, reconstruction, rehabilitation, or replacement of charter school facilities, including the furnishing and equipping of charter school facilities. Charter schools were allocated 350 million in funds out of the $2.8 billion bond.

Where does the bond program fit in?

The bond program is a unique option that allows charter schools to own their own facility that is either a new construction project or the rehabilitation of current school facilities. Historically, the bond program has been a great option for some schools, but has also proven to be less than ideal for other schools.

What works?

Rehabilitation program: The bond program allows for charter schools to rehabilitate an existing school district facility. The program currently offers preference points for a charter application that includes a rehabilitation component.

Ideal facilities for an educational environment: The bond program allows charter public school students to attend a school that has all the same features as traditional public schools – gymnasiums, fields and outdoor areas, etc.

What doesn't work?

Matching share: Like traditional public school districts, charter public schools must provide fifty percent of the total project cost as a match of the state share. Unlike traditional public school districts, charters do not have a bonding capacity and cannot run local bonds on their own to use for that matching share.

Charters may get a loan for their matching share. The loan is a long-term loan which requires charter schools to take on a debt obligation. Further, the process is burdensome as they have to renew their financial soundness determination every six months. The loan also must be paid back through general operating dollars that could be spent on instructional expenses.

Facilities use agreements: When a charter school chooses to rehabilitate an existing school facility, they must enter into a facilities use agreement with that school. This has proven to be a hurdle for some schools as the parties have a difficult time coming to an agreement on terms.

How to increase charter participation in the bond program

Streamline the program: This is a complicated program and charter schools have struggled to jump through all the necessary hoops. It is typically a top school official who handles their facilities, not a school facility expert.

Enhance the rehabilitation component: The program already incentivizes charters to use district facilities. Further charter use of district facilities provides for a smaller grant (and therefore smaller matching share) for charters. It also provides for the use of facilities that are not being used otherwise.

Encourage charter and district relationships: It would be a win-win for charters to utilize district facilities and take advantage of the rehabilitation program to improve those facilities. Charter inclusion in local bonds would alleviate the need for the state to front the 50 percent loan to a charter school, providing more funds to be used for projects.