

Charter School Facilities Program - Preliminary Apportionment Application Submittal Requirements

February 2014

A complete application is an essential element in the process of receiving a preliminary apportionment for the charter school or district's project. The information provided is the basis for determining the apportionment amounts that the charter school or district (on behalf of the charter school) will receive. The application form provides the Office of Public School Construction (OPSC) with the general project information to determine the future new construction or rehabilitation adjusted grant, the grade level of the project, and if any supplemental grants are requested.

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

All Application Types:

- o Completed form, *Application for Charter School Preliminary Apportionment* (Form SAB 50-09).
- o Evidence that charter school delivered notification to the school district at least 30 days prior to the submission of the Form SAB 50-09 to the OPSC. (For charter schools applying independently only)
- o Narrative description of the proposed project.
- o Preliminary CDE Recommended Site Size letter.
- o Copy of the chartering agreement (2 copies – applications without 2 copies will be returned).
- o Verification of non-profit status, if applicable.

CSFA - Financial Soundness Documents (2 copies)

- o Completed form, 2014 Financial Soundness Application Form.
- o All supporting financial documentation (e.g. organization and financial information, all material contracts, and legal status questionnaire).

New Construction:

- o Copy of the school district governing board's resolution certifying to the number of the district's unhoused students that the charter school project will house. (For charter schools applying independently only)
- o Copy of the school board meeting minutes that describe the discussion and approval of the certification resolution. (For charter schools applying independently only)

- o Documentation that describes the method used to determine the number of the school districts unhoused students that would be included in the proposed charter school project.
- o Appraisal or Preliminary Appraisal of the property to be acquired that is less than six months old; or Median Cost valuation, consisting of county recorder documentation of consummated sales transactions, within the General Location; or title insurance company escrow instruction(s) for a minimum of 6 months and a maximum of 2 years, which indicate the agreed upon purchase price of the property(s) for pending real-estate sales. Submit with the consummated sales transactions and pending escrow instruction data a spreadsheet summary of the data in a price per acre format.
- o Relocation and Department of Toxic Substances Control Board cost documents, if applicable. Refer to SFP Regulation Section 1859.145.1.
- o A cost estimate for site development, which reflects 100 percent of the proposed work, outlined in SFP Regulation Section 1859.76, and approved site development and off-site plans, when requesting more than \$70,000 per proposed useable acres. Refer to SFP Regulation Section 1859.145.
- o Completed forms SAB 50-01, Form SAB 50-02 and Form SAB 50-03 for SFP New Construction Eligibility (if not previously submitted by the school district). Application will initially be accepted without this documentation; however, it will be required once available from the school district.

Rehabilitation:

- o Signed agreement between the charter school and the school district for the rehabilitation of district owned facilities.
- o Drawing with dimensions of all proposed buildings including interior dimensioning and labeling of facilities to be rehabilitated. Drawings must highlight toilet area.