

# Charter School Facilities Program

## 2014 FILING PERIOD TECHNICAL WORKSHOPS

*Presented by:*

Office of Public School Construction  
California Department of Education  
California School Finance Authority

# Office of Public School Construction



**University High School – Fresno, CA**

# Charter School Facilities Program (CSFP)

- Established in 2002
- Provides funding for classroom facilities
  - 50% State grant
  - 50% charter school match
    - Lease option for match
  - New construction
  - Rehabilitation of district owned sites
- Applications accepted during specified filing rounds

# When Can I Apply?

- April 1 – May 30, 2014.
- Applications accepted during entire filing period
  - Applying earlier may be beneficial.
- Complete, valid applications with an original signature and all supporting documents must be physically received by the OPSC by 5:00 p.m. on May 30, 2014.

**Office of Public School Construction**  
**707 Third Street, West Sacramento, CA 95605**

# Who Can Apply?

- Eligible charters
  - Independent and dependent
  - 2 years operating experience or administrative experience
  - Provide classroom based instruction
    - Meeting the requirements of Education Code 47612.5.
  - Charter petition approved prior to application submittal date
- Applicants
  - Charter school
  - Local school district

# What Am I Applying For?

- Preliminary Apportionment (PA)
  - Reservation of bond authority
    - Amount available for round determined at future SAB meeting
      - Approximately \$87.6 million available
  - Proposed project costs
    - 50% State grant
    - Lease for Charter 50% match, if requested
  - Convert to final apportionment within 4 years
    - Possible one-time, one-year extension

# What Types of Projects?

- New construction
  - Adds capacity
    - Construction of a new school
    - Addition of classrooms to an existing school
    - Funded based on pupil capacity of project
- Rehabilitation
  - Existing district facilities that are at least 15 years old
  - Work is similar to modernization but can include structural changes
    - Increased square footage = new construction
  - Funded on a square footage basis
    - Funding may be capped
- Combination project

# How is the PA Determined?

- Base grant
  - New Construction, pupil grant
  - Rehabilitation, square footage
- Supplemental and excessive cost grants
  - New construction SFP Regulation 1859.163.1
  - Rehabilitation SFP Regulation 1859.163.5
  - Examples
    - Site acquisition
    - Site development
    - Multilevel construction
- Inflation factor

# Calculating the Base Grant

- New Construction

- Multiply the project capacity by the appropriate 2014 pupil grant amounts:

• K-6	\$9,967
• 7-8	\$10,553
• 9-12	\$13,785
• Non-severe	\$20,039
• Severe	\$29,966

- Rehabilitation

- Multiply square footage by the 2014 grant amount

• Non-toilet	\$162
• Toilet	\$292

# What Happens if Program is Oversubscribed?

- Preference points are assigned to each application
  - 160 maximum points possible
    - Percentage of District Overcrowding Up to 40 points
    - Low Income Up to 40 points
    - Non-Profit Status 40 points
    - Existing Facilities 40 points
- The Funding Matrix is used to determine funding order (please see the *CSFP Funding Matrix* handout)
- Unfunded projects remain open for 8 months

# Getting Started

- Approved charter petition
  - Must be approved prior to date application is received by OPSC
- Determine facility needs
  - Work with district to consider existing facilities
- CDE recommended site size letter
- Identify proposed area
- Notify school district
  - Must notify local school district a minimum of 30 days prior to submitting application to OSPC

# Current Application Process

- Submit application packet to OPSC
- OPSC reviews submittal for completeness
  - 24 hour letters
- OPSC forwards financial documents to CSFA
- OPSC reviews application and supporting documents
  - 15 and 4 day letters
- PA amount determined and given to CSFA
- Preference points assigned
- Projects ranked using funding matrix
- Financial soundness determination by CSFA
- PAs awarded at SAB meeting

# What Makes a Complete Application?

- Funding Application
  - *Application for Charter School Preliminary Apportionment* (Form SAB 50-09)
  - Submit 1 copy
- Financial Soundness Application
  - Form CSFA 03-01
  - Submit 2 copies
- Supporting Documentation



Animo Venice Charter High School  
– Venice, CA

# Supporting Documentation

## Items Required for All Application Types

- Narrative description of the proposed project.
  - Number of classrooms and grade level of pupils
  - Permanent or portable
  - Proposed opening date
  - Charter School General Location
- Approved Charter Petition (2 copies)
- Verification of non-profit status (if applicable)
- Verification of notification to the school district (if the charter school is applying independently)

# Supporting Documentation

## Additional Items for New Construction Applications

- California Department of Education (CDE) Estimated Recommended Site Size letter
- Notification to the school district (if the charter school is applying independently)
  - Request district update new construction eligibility
  - Request district certification to the number of unhoused students the project will serve
    - Due to OPSC 90 days from date of notification

# Supporting Documentation

## Additional Items for New Construction Applications (Cont.)

- District certification to the number of unhoused students the project will serve, in the form of a board resolution (only required if the charter school is submitting the application independently)
- Methodology for determining the number of unhoused students the project will serve

# Supporting Documentation

## Additional Items for New Construction

### Applications (If requesting funding for Site Acquisition)

- Appraisal or Preliminary Appraisal that is less than six months old; or
- Median cost valuation (in price per acre format)
  - Must meet requirements in SFP Regulation Section 1859.163.2(2)

# Supporting Documentation

## Additional Items for New Construction Applications

- Relocation and Department of Toxic Substances Control (DTSC) cost documents, if applicable
- Cost estimate for site development reflecting 100% of the proposed work, and approved site development and off-site plans
  - Only if requesting more than the allowed \$70,000 per proposed useable acre

# Supporting Documentation

## Additional Items for Rehabilitation Applications

- Drawings showing dimensions (including the total enclosed exterior square footage) of classrooms and subsidiary facilities to be rehabilitated
  - Drawings must also highlight Toilet area
- Agreement between the District and Charter School that authorizes the use of the District's facilities for the CSFP (only required if the charter school is submitting the application independently)

# Completing the Funding Application

- Filling out the *Application for Charter School Preliminary Apportionment* (Form SAB 50-09)
- How to Find the Locale Code
- How to Find the Free and Reduced Lunch Percentages



Oscar de la Hoya Animo Charter High School – Los Angeles, CA

# Filling Out the Form SAB 50-09

STATE OF CALIFORNIA  
**APPLICATION FOR CHARTER SCHOOL PRELIMINARY APPORTIONMENT**  
SCHOOL FACILITY PROGRAM  
SAB 50-09 (REV 12/11)

STATE ALLOCATION BOARD  
OFFICE OF PUBLIC SCHOOL CONSTRUCTION

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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.

<input type="checkbox"/> SCHOOL DISTRICT APPLYING ON BEHALF OF CHARTER SCHOOL	<input type="checkbox"/> 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		

# Filling Out the Form SAB 50-09

## 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): \_\_\_\_\_

# Filling Out the Form SAB 50-09

## 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:  
\_\_\_\_\_

# Filling Out the Form SAB 50-09

(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.): \_\_\_\_\_

# Filling Out the Form SAB 50-09

## 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 or will be awarded on or after January 1, 2012, please indicate which method will be used to meet the prevailing wage monitoring requirements, pursuant to LC Section 1771.3:

- DIR CMU Administered
- DIR Approved District LCP
- Collective bargaining agreement, pursuant to Labor Code Section 1771.3(b)(3)

# Filling Out the Form SAB 50-09

## Prevailing Wage and Compliance Monitoring Requirements

- Districts/charters must have Department of Industrial Relations (DIR) approved compliance monitoring for all public works projects with a construction contract awarded after January 1, 2012.
- Limited exceptions:
  - District/charter elects to continue to use a previously DIR approved in-house Labor Compliance Program.
  - District/charter has entered in to a collective bargaining or project labor agreement that meets certain conditions detailed in Labor Code.

# Filling Out the Form SAB 50-09

## Prevailing Wage and Compliance Monitoring Requirements (continued)

- Additional information from DIR is available at:  
<http://www.dir.ca.gov/dlse/cmu/cmu.html>

**Failure to comply with the DIR's Compliance Monitoring Unit requirements could jeopardize the project's State funding**

# Filling Out the Form SAB 50-09

STATE OF CALIFORNIA

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

SAB 50-09 (REV 12/11)

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**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:

# \_\_\_\_\_

# How to Find the Locale Code

1. Go to <http://nces.ed.gov/ccd/schoolsearch/>

**Search for Public Schools** CCD Common Core of Data

**School Information** [District Search](#) [New Schools](#) [Data Notes/Grant IDs](#) [Help](#)

**School Name:**  **NCES School ID:**

**Street Address:**  **City:** [Browse](#)

**State:**  **Zip Code:**  ~  **Distance:**  Miles from Zip

**County of District:** [Browse](#)  **Phone #:**  -

**District Name:**  **NCES District ID:**

**SEARCH TIP:** Searches are conducted based on all information you enter. You **not need** to enter information for all fields. More specificity yields fewer results.

After specifying your search criteria, click the **Search** button.

**Additional Characteristics**

**School Description**  
Regular  Special Education  Vocational  Other/Alternative

**Specific School Type**  
All  Charter School  Magnet School

**Grade-Span** All PK KG 1 2 3 4 5 6 7 8 9 10 11 12

Includes Grade

Low Grade

High Grade

**SEARCH TIP:** Use the additional characteristics fields in conjunction with any of the School Information.

Additional Characteristics **should not** be used if you have already entered the name of a school.

Source: CCD Public school data 2006-2007 school year

# How to Find the Locale Code

## 2. Select the school

 **Search for Public Schools** **CCD** Common Core of Data

**Search Results** (records: 66) [Modify Search](#) [Data Notes/Grant IDs](#) [Help](#)

	School Name	Phone	County*	Students*	Grades*
1.	<a href="#">CARVER (GEORGE WASHINGTON) ELEMENTARY</a> 1360 Oakdale AVE., San Francisco, CA 94124	(415) 330-1540	San Francisco County	280	KG-5
2.	<a href="#">FORT WASHINGTON ELEMENTARY</a> 960 East Teague AVE., Fresno, CA 93720	(559) 327-6600	Fresno County	574	KG-6
3.	<a href="#">GEORGE WASHINGTON BATTLES ELEMENTARY</a> 605 East Battles RD., Santa Maria, CA 93454	(805) 361-6880	Santa Barbara County	851	KG-6
4.	<a href="#">GEORGE WASHINGTON CARVER ELEMENTARY</a> 1401 West Santa Ana BLVD., Santa Ana, CA 92703	(714) 564-2000	Orange County	564	KG-3
5.	<a href="#">GEORGE WASHINGTON CARVER MIDDLE</a> 4410 Mckinley AVE., Los Angeles, CA 90011	(323) 846-2900	Los Angeles County	1,590	5-8
6.	<a href="#">GEORGE WASHINGTON CARVER SCHOOL OF ARTS AND SCIENC</a> 10101 Systems PKWY., Sacramento, CA 95827	(916) 228-5751	Sacramento County	245	9-12
7.	<a href="#">GEORGE WASHINGTON CHARTER</a> 45-768 Portola AVE., Palm Desert, CA 92260	(760) 862-4350	Riverside County	766	KG-5
8.	<a href="#">GEORGE WASHINGTON ELEMENTARY</a> 251 Whittier ST., Daly City, CA 94014	(650) 991-1236	San Mateo County	366	KG-5
9.	<a href="#">GEORGE WASHINGTON ELEMENTARY</a> 831 West Lockeford ST., Lodi, CA 95240	(209) 331-7451	San Joaquin County	437	KG-6
10.	<a href="#">GEORGE WASHINGTON ELEMENTARY</a> Po Box 1067, Hanford, CA 93232	(559) 585-3805	Kings County	562	KG-6
11.	<a href="#">GEORGE WASHINGTON ELEMENTARY</a> 1220 West Parkridge AVE., Norco, CA 92860	(951) 736-3326	Riverside County	983	KG-7
12.	<a href="#">GEORGE WASHINGTON ELEMENTARY</a> 2322 North Lincoln ST., Burbank, CA 91504	(818) 558-5550	Los Angeles County	490	KG-5



# How to find the Free and Reduced Lunch Percentages

1. Go to <http://dq.cde.ca.gov/dataquest/>



Change Text Size: [A](#) [A](#) [A](#)

 **California** Department of  
**EDUCATION**

**DataQuest**

[CDE Home](#) | [Enrollment](#) and [Staffing](#) Data Files | [API Home](#) | [AYP Home](#) | [CAHSEE Home](#) | [CELDT Home](#) | [STAR Home](#) | [Testing Home](#)

**DataQuest** helps you find facts about California schools and districts.

To create a report: (1) select a Level, (2) select a Subject, and (3) click on the "Submit" button.

- [What's NEW?](#) DataQuest Change Log
- [What's in DataQuest?](#)
- [QuickQuest](#) lets you find answers fast!
- [Our Parents Page](#) is another way to find data.
- [Contact information for program related questions](#)
- [California School Directory](#)
- [Help on using DataQuest](#)
- [DataQuest Reporting Levels](#)

**1. Select Level:**

Level:

**2. Select Subject:**

Subject:

**3. Click Submit:**

Questions: [DataQuest](#) | [DataQuest Management Team](#) | (916) 327-0193

# How to find the Free and Reduced Lunch Percentages

## 2. Enter the school name or district information

Change Text Size: [A](#) [A](#) [A](#)



[CDE Home](#) » [DataQuest](#) » Select Criteria

### Select Year of Data and Enter a Portion of the School Name

1) Determine a time frame.

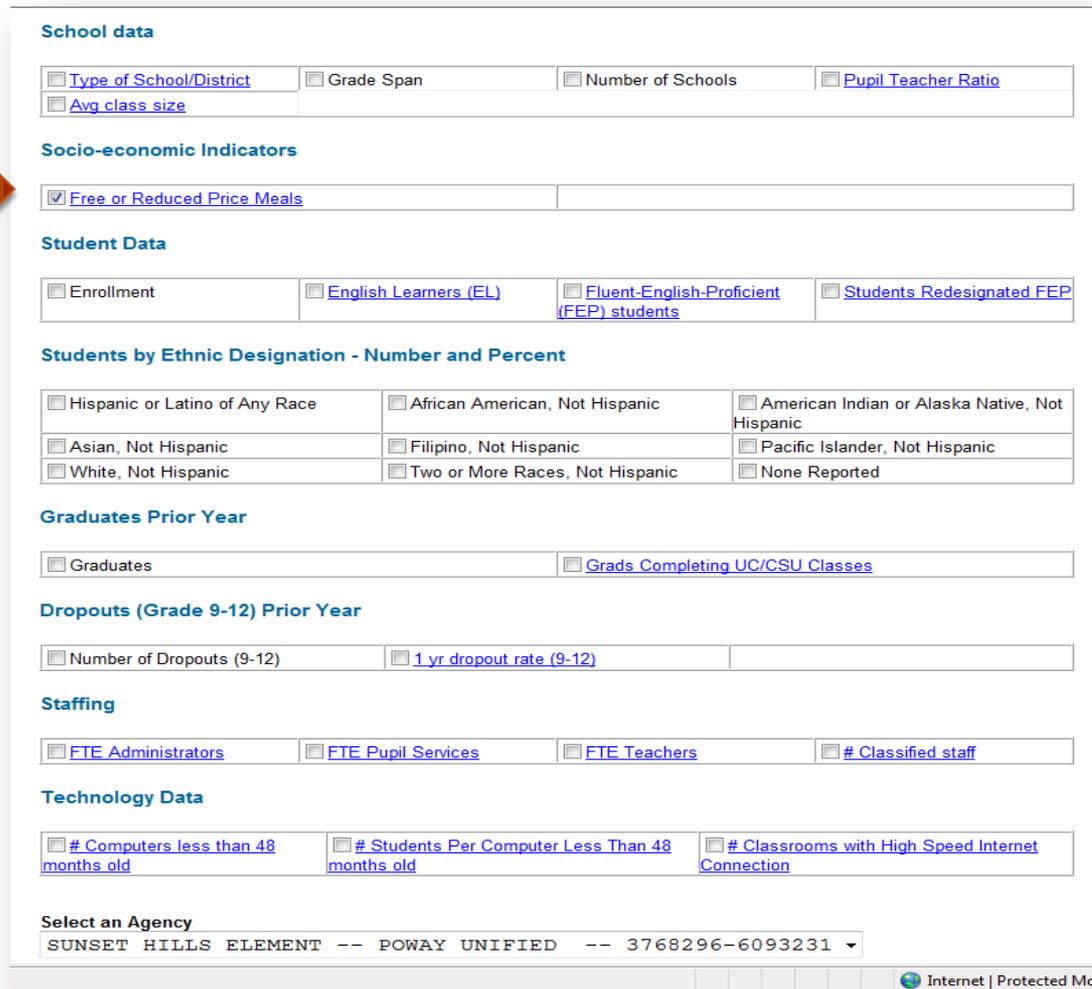
Single year -- select year:  ▼

2) Type a portion of the name then press the "Submit" button.

Questions: [DataQuest](#) | [Data Reporting Office](#) | (916) 327-0193

# How to find the Free and Reduced Lunch Percentages

3. Select the “Free or Reduced Price Meals” box.



**School data**

<input type="checkbox"/> <a href="#">Type of School/District</a>	<input type="checkbox"/> <a href="#">Grade Span</a>	<input type="checkbox"/> <a href="#">Number of Schools</a>	<input type="checkbox"/> <a href="#">Pupil Teacher Ratio</a>
<input type="checkbox"/> <a href="#">Avg class size</a>			

**Socio-economic Indicators**

<input checked="" type="checkbox"/> <a href="#">Free or Reduced Price Meals</a>	
---	--

**Student Data**

<input type="checkbox"/> <a href="#">Enrollment</a>	<input type="checkbox"/> <a href="#">English Learners (EL)</a>	<input type="checkbox"/> <a href="#">Fluent-English-Proficient (FEP) students</a>	<input type="checkbox"/> <a href="#">Students Redesignated FEP</a>
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**Students by Ethnic Designation - Number and Percent**

<input type="checkbox"/> <a href="#">Hispanic or Latino of Any Race</a>	<input type="checkbox"/> <a href="#">African American, Not Hispanic</a>	<input type="checkbox"/> <a href="#">American Indian or Alaska Native, Not Hispanic</a>
<input type="checkbox"/> <a href="#">Asian, Not Hispanic</a>	<input type="checkbox"/> <a href="#">Filipino, Not Hispanic</a>	<input type="checkbox"/> <a href="#">Pacific Islander, Not Hispanic</a>
<input type="checkbox"/> <a href="#">White, Not Hispanic</a>	<input type="checkbox"/> <a href="#">Two or More Races, Not Hispanic</a>	<input type="checkbox"/> <a href="#">None Reported</a>

**Graduates Prior Year**

<input type="checkbox"/> <a href="#">Graduates</a>	<input type="checkbox"/> <a href="#">Grads Completing UC/CSU Classes</a>
--	--

**Dropouts (Grade 9-12) Prior Year**

<input type="checkbox"/> <a href="#">Number of Dropouts (9-12)</a>	<input type="checkbox"/> <a href="#">1 yr dropout rate (9-12)</a>	
--	---	--

**Staffing**

<input type="checkbox"/> <a href="#">FTE Administrators</a>	<input type="checkbox"/> <a href="#">FTE Pupil Services</a>	<input type="checkbox"/> <a href="#">FTE Teachers</a>	<input type="checkbox"/> <a href="#"># Classified staff</a>
---	---	---	---

**Technology Data**

<input type="checkbox"/> <a href="#"># Computers less than 48 months old</a>	<input type="checkbox"/> <a href="#"># Students Per Computer Less Than 48 months old</a>	<input type="checkbox"/> <a href="#"># Classrooms with High Speed Internet Connection</a>
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**Select an Agency**

SUNSET HILLS ELEMENT -- POWAY UNIFIED -- 3768296-6093231 ▾

Internet | Protected Mod

# How to find the Free and Reduced Lunch Percentages

Selected School Level Data  
SUNSET HILLS ELEMENT--POWAY UNIFIED --3768296-6093231  
for the year 2012-13

- Click on the school name to run other reports for the same school.
- Click on "District Total", "County Total" or "State Total" to view reports at that level.

School	Free & Reduced Price Meals	Unofficial Enrollment Used for Meals
<a href="#">Sunset Hills Elementary</a>	71 (16.6%)	429
<a href="#">District Total:</a>	4,771 (13.9%)	34,417
<a href="#">County Total:</a>	240,503 (49.6%)	485,006
<a href="#">State Total:</a>	3,509,407 (58.0%)	6,054,192



# Completing the Form SAB 50-09

## Y APPORTIONMENT

STATE ALLOCATION BOARD  
OFFICE OF PUBLIC SCHOOL CONSTRUCTION

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### 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 con-

# Completing the Form SAB 50-09

## 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
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# A Few More Items

- Whoever applies receives the funding
- Pupil grants and square footage requested at the PA phase may not be increased at the time of conversion.
- Title to the facilities and site must be held by the school district, a governmental entity or the charter school
  - A request to hold title is required by the charter school if it wishes to hold title

# A Few More Items (Cont.)

- If you receive a preliminary apportionment advance funds are available for the design of the project and the purchase of a site
  - In order to receive funds:
    - Charter must participate in the Priority Funding process
    - Charter must have current financial soundness
    - Prior to any funds being released the Charter School Agreements must be executed
    - Additional requirements must be met for site acquisition and for charters holding title

# Projects In Process

- Rehabilitation and new construction funding can be used to reimburse completed projects
  - All CSFP/SFP requirements must be met
  - For new construction no occupancy prior to submittal of a complete *Application for Funding* (Form SAB 50-04) to the OPSC
    - Final DSA and CDE approvals for the project.
- PWM compliance for projects with construction contracts awarded January 1, 2012 or later

# OPSC Website

- CSFP
  - <http://www.dgs.ca.gov/opsc/Programs/charterschoolfacilitiesprogram.aspx>
- Current Form SAB 50-09
  - <http://www.dgs.ca.gov/opsc/Forms/formsbynumber.aspx>
- SFP Handbook
  - <http://www.dgs.ca.gov/opsc/Resources/Guides.aspx>
- Priority Funding information
  - <http://www.dgs.ca.gov/opsc/Home/PriorityFunding.aspx>

# CSFP Contacts

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**Janna Shaffer**, Supervisor

- (916) 376-1822
- [janna.shaffer@dgs.ca.gov](mailto:janna.shaffer@dgs.ca.gov)

**Erin Cunneen**, Project Manager

- (916) 375-4741
- [erin.cunneen@dgs.ca.gov](mailto:erin.cunneen@dgs.ca.gov)

**Jason Casillas**, Project Manager

- (916) 375-4229
- [jason.casillas@dgs.ca.gov](mailto:jason.casillas@dgs.ca.gov)

# Questions?

