

REPORT OF THE EXECUTIVE OFFICER
State Allocation Board Meeting, August 23, 2006

SCHOOL FACILITY PROGRAM JOINT-USE PROJECTS

PURPOSE OF REPORT

To present requests for funding under the School Facility Program (SFP) Joint-Use Program.

DESCRIPTION

Under the SFP Joint-Use Program, a school district may partner with a local entity to build either a Type I or Type II facility.

- A Type I facility is a joint-use project that is a part of a qualifying SFP new construction project and is constructed under the Joint-Use Program. The proposed facility consists of an increased square footage amount and/or an increase in eligible costs that are greater than that applied to a standard like-project under the SFP. The joint-use project may consist of a multipurpose room, gymnasium, childcare facility, library, or teacher education facility that is part of a new construction project.
- A Type II facility allows for the construction of new joint-use facilities or the reconfiguration of existing school buildings to provide for a multipurpose room, gymnasium, childcare facility, library, or teacher education facility.

A district may submit more than one application for each type of project; however, after its first application is placed on a funding priority list in date-received order, its subsequent applications are not placed on the priority for funding list until all other districts' initial applications are placed on the list. This allows all districts, that have applied, the opportunity to receive funding under the Joint-Use Program. In addition, Type I applications receive funding consideration first and then Type II applications are considered, if remaining funds are available. Once the funds are exhausted, the remaining projects are returned to the school districts as there is no unfunded list. The school districts may reapply in subsequent filing periods when funds become available.

A financial contribution towards the cost of the joint-use project must be equal to the State's share (50/50). The contribution made by the joint-use partner(s) must be no less than 25 percent of the eligible project costs. The remaining local contribution may come from any other district source that would not otherwise be available to the State Allocation Board (SAB). However, if the school district has passed a local bond which specifies that such funds are to be used for that joint-use project, then the school district may opt to provide up to the full 50 percent local share of eligible costs. The State share of a joint-use project will be the lesser of 50 percent of the eligible project costs not to exceed \$1 million if the project is serving an elementary school, \$1.5 million if the project is serving a middle school, or \$2 million if the project is serving a high school.

AUTHORITY

Education Code (EC) Section 17077.40 establishes the authority to fund joint-use projects to construct facilities on Kindergarten to grade 12 school sites.

EC Section 17088.2 states in part that the Board may transfer any funds within the State School Building Aid Fund that are in excess of the amounts needed by the Board for the maintenance of portable buildings or for the purchase of new portable buildings, for that fiscal year, to any of the following, as appropriate: the 1998, 2002, or 2004 State School Facilities Fund for allocation by the Board for any purpose authorized pursuant to that fund.

STAFF COMMENTS

Applications Received

The SFP Joint-Use Program application filing period was June 1, 2005 through May 31, 2006 for projects to be considered for funding at a future SAB meeting. Staff received a total amount of \$46,619,927 in qualifying joint-use projects; these are listed on the Attachment in priority order. Also included on the Attachment to be considered for funding is the St. Helena Unified School District project, which is part of the Specials calendar in today's agenda. There are two projects included in the Attachment that are being built below minimum essential facility standards. However, the California Department of Education has approved the reduced square footage for these projects.

Funding Availability and Options

Two joint-use projects are being rescinded as part of the Consent Calendar in today's agenda, bringing the total available SFP Joint-Use Program funds to \$34,876,363. If the St. Helena Unified School District project is also rescinded at this Board (in the Specials section of today's agenda), the total available would be \$35,425,351. This amount would provide joint-use funding for districts listed above the line on the Attachment, with the exception of Stockton Unified and Big Oak Flat-Groveland Unified School Districts, which declined a partial apportionment. The remaining balance of joint-use funds would be \$30,279, which is insufficient to fund additional projects.

As shown on the Attachment, there is still an outstanding need for joint-use funding. The Board has the following options:

Option 1 - The Board has at its disposal the authority to apportion the remaining projects with funds that can be transferred from the State Relocatable Classroom Program (SRCP). Pursuant to EC Section 17088.2, the Board may transfer any funds within the State School Building Aid Fund that are in excess of the amounts needed by the Board to the 2004 State School Facilities Fund for allocation for any purpose authorized pursuant to the 2004 State School Facilities Fund. The funds that would be requested to be transferred would be enough to fund the rest of the joint-use projects. An item would be presented to fund the projects at a future SAB meeting, when revenue becomes available.

Option 2 - The second option available to the Board would be to hold over the remaining projects until November, at which time Proposition 1D, (Chapter 35, Statutes of 2006 – Nunez and Perata), will be presented to the voters of California. If this measure is approved, it will provide \$50 million for joint-use projects which the Board may use to fund the remaining eligible projects on the Attachment.

Joint-Use Appeals

Beyond those joint-use projects shown on the Attachment, there are three appeal requests that will be presented at the September SAB meeting. Staff determined that the districts did not meet the criteria for funding and the applications were returned to the districts. The districts are appealing Staff's findings. If the Board approves either of the above funding source options, those funds could be used to apportion the three appeal requests, in the event the Board approves the appeal(s).

RECOMMENDATIONS

1. Apportion the available funding for eligible projects as indicated on the Attachment.
2. Consider apportioning the remaining eligible projects utilizing either Option 1 or Option 2.

BOARD ACTION

In considering this item, the Board approved Staff's recommendation number one, with a further recommendation that options to fund the unfunded joint-use projects be considered at the December 2006 meeting following the outcome of the November 2006 statewide school bond election.

ATTACHMENT
SCHOOL FACILITY JOINT-USE PROGRAM
August 23, 2006 SAB MEETING

(Rev.2)

County	School District	Site Name	Application Number	Type of Facility	Joint Use Type	Grade Level	Project Cost				Cumulative Value of State Apportionment
							Total Estimated Cost	Joint Use Partner Share	**Additional Dist./JU Partner Contribution	***State Apportionment	
Contra Costa	Brentwood Union	Marsh Creek Elementary*	52/61655-00-005	Multipurpose	1	K-6	\$927,010	\$417,155	\$0	\$463,505	\$463,505
Riverside	Alvord Unified	The Learning Center*	52/66977-00-001	Teacher Ed	1	K-6	\$2,082,746	\$500,000	\$82,746	\$1,000,000	\$1,463,505
Solano	Dixon Unified	Dixon High*	52/70532-00-001	Gym	1	9-12	\$3,851,500	\$962,875	\$0	\$1,925,750	\$3,389,255
Imperial	McCabe Union Elementary	McCabe Middle*	52/63180-00-001	Gym	1	7-8	\$2,882,100	\$1,441,050	\$0	\$1,441,050	\$4,830,305
Placer	Western Placer Unified	Lincoln Crossing Elementary*	52/66951-00-005	Multipurpose	1	K-6	\$1,979,604	\$494,901	\$0	\$989,802	\$5,820,107
Stanislaus	Patterson Joint Unified	Walnut Grove Middle School*	52/71217-00-001	Gym	1	7-8	\$5,224,062	\$750,000	\$2,224,062	\$1,500,000	\$7,320,107
Placer	Roseville Joint Union High	Antelope High*	52/66928-00-001	Gym	1	9-12	\$5,458,124	\$0	\$1,458,124	\$2,000,000	\$9,320,107
Contra Costa	Brentwood Union	J. Douglas Adams Middle*	52/61655-00-006	Gym	1	7-8	\$2,348,450	\$1,174,225	\$0	\$1,174,225	\$10,494,332
Riverside	Alvord Unified	The Learning Center*	52/66977-00-002	Library	1	K-6	\$1,826,216	\$465,054	\$0	\$930,108	\$11,424,440
San Diego	Fallbrook Union Elementary	Potter (James E.) Inter.	52/68114-00-001	Gym	2	7-8	\$4,645,928	\$0	\$1,645,928	\$1,500,000	\$12,924,440
Tuolumne	Big Oak Flat-Groveland Unified	Tioga High	52/75184-00-001	Gym	2	9-12	\$2,928,532	\$0	\$0	\$1,469,384	\$14,393,824
San Joaquin	Escalon Unified	Van Allen Elementary	52/68502-00-001	Multipurpose	2	K-6	\$1,372,678	\$343,170	\$0	\$686,339	\$15,080,163
Kings	Corcoran Joint Unified	Corcoran High	52/63891-00-001	Teacher Ed	2	9-12	\$6,739,206	\$1,080,000	\$2,739,206	\$2,000,000	\$17,080,163
Riverside	Nuview Union	Nuview Elementary	52/67157-00-002	Child Care	2	K-6	\$806,060	\$201,515	\$0	\$404,411	\$17,484,574
San Joaquin	Manteca Unified	Neil Hafley	52/68593-00-003	Gym	2	K-6	\$4,071,204	\$500,000	\$2,071,204	\$1,000,000	\$18,484,574
Stanislaus	Keyes Union Elementary	Barbara Spratling Middle	52/71134-00-002	Multipurpose	2	7-8	\$1,627,182	\$0	\$0	\$813,591	\$19,298,165
Lake	Konocti Unified	East Lake Elementary	52/64022-00-005	Library	2	K-6	\$372,132	\$0	\$0	\$186,696	\$19,484,861
San Joaquin	Linden Unified	Linden High	52/68577-00-005	Teacher Ed	2	9-12	\$3,132,614	\$783,154	\$0	\$1,566,307	\$21,051,168
Orange	Buena Park Elementary	Buena Park Junior High	52/66456-00-001	Gym	2	7-8	\$5,295,650	\$750,000	\$2,295,650	\$1,500,000	\$22,551,168
Alameda	San Leandro Unified	Muir (John) Junior High	52/61291-00-001	Teacher Ed	2	7-8	\$3,519,296	\$750,000	\$519,296	\$1,500,000	\$24,051,168
Santa Clara	Gilroy Unified	Macsa El Portal Leadership	52/69484-00-001	Multipurpose	2	9-12	\$2,754,402	\$688,601	\$0	\$1,377,201	\$25,428,369
Alameda	San Lorenzo Unified	Washington Manor Middle	52/61309-00-001	Gym	2	7-8	\$4,306,776	\$750,000	\$1,306,776	\$1,500,000	\$26,928,369
Imperial	El Centro Elementary	Wilson Junior High	52/63123-00-001	Gym	2	7-8	\$4,063,454	\$0	\$1,069,454	\$1,500,000	\$28,428,369
Riverside	Menifee Union Elementary	Menifee Valley Middle Expan.	52/67116-00-001	Gym	2	7-8	\$5,116,556	\$750,000	\$2,116,556	\$1,500,000	\$29,928,369
Fresno	Kerman Unified	Kerman-Floyd Elementary 1	52/73999-00-004	Library	2	K-6	\$799,206	\$0	\$0	\$399,603	\$30,327,972

* The Joint-Use approval is contingent upon the SAB approval of the qualifying new construction project, in accordance with Regulation Section 1859.123.

** Any additional financial contributions can be made by the Joint-Use partner(s), the district or any other local source.

*** The State Apportionment has a maximum cap of \$1,000,000 for an elementary school, \$1,500,000 for a middle school, and \$2,000,000 for a high school.

Note: Amounts shown have been adjusted per Regulation Section 1859.71

1. The District is not building Minimum Essential Facilities; however, the CDE has approved the reduced square footage.

**ATTACHMENT
SCHOOL FACILITY JOINT-USE PROGRAM
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(Rev.2)

County	School District	Site Name	Application Number	Type of Facility	Joint Use Type	Grade Level	Project Cost				Cumulative Value of State Apportionment
							Total Estimated Cost	Joint Use Partner Share	**Additional Dist./JU Partner Contribution	***State Apportionment	
Los Angeles	Montebello Unified	Rosewood Park Elementary	52/64808-00-001	Library	2	7-8	\$731,440	\$0	\$0	\$365,720	\$30,693,692
Los Angeles	Arcadia Unified	Foothills Middle	52/64261-00-001	Gym	2	7-8	\$3,655,140	\$750,000	\$655,140	\$1,500,000	\$32,193,692
Marin	Marin COE	Marin County Comm. School	52/10215-00-001	Teacher Ed	2	9-12	\$1,079,186	\$269,797	\$0	\$539,593	\$32,733,285
Inyo	Owens Valley Unified	Owens Valley Elementary	52/63297-00-001	Multipurpose	2	K-8	\$1,448,422	\$0	\$0	\$726,757	\$33,460,042
Tulare	Dinuba Unified	Dinuba High	52/75531-00-001	Teacher Ed	2	9-12	\$1,870,060	\$467,515	\$0	\$935,030	\$34,395,072
San Joaquin	Stockton Unified	Garfield High 2	52/68676-00-001	Gym	2	9-12	\$5,107,600	\$1,000,000	\$1,107,600	\$2,000,000	
Tuolumne	Big Oak Flat-Groveland Unified	Pedro (Don) High	52/75184-00-002	Multipurpose	2	9-12	\$4,029,128	\$0	\$29,128	\$1,452,800	
San Joaquin	Manteca Unified	Shasta Elementary	52/68593-00-002	Gym	2	K-6	\$2,674,754	\$500,000	\$674,754	\$1,000,000	\$35,395,072
Alameda	San Lorenzo Unified	Edendale Middle	52/61309-00-002	Gym	2	K-8	\$4,243,656	\$0	\$1,243,656	\$1,500,000	\$36,895,072
Fresno	Kerman Unified	Sun Empire Elementary	52/73999-00-005	Library	2	K-6	\$725,256	\$0	\$0	\$316,345	\$37,211,417
San Joaquin	Stockton Unified	Garfield High 1, 2	52/68676-00-002	Multipurpose	2	9-12	\$3,359,222	\$839,806	\$0	\$1,473,056	\$38,684,473
Lake	Konocti Unified	Pomo Elementary	52/64022-00-006	Library	2	K-6	\$897,984	\$0	\$0	\$407,111	\$39,091,584
Alameda	San Lorenzo Unified	Bohannon Middle	52/61309-00-003	Gym	2	7-8	\$4,263,706	\$0	\$1,263,706	\$1,500,000	\$40,591,584
Lake	Konocti Unified	Lower Lake High	52/64022-00-007	Gym	2	9-12	\$4,691,252	\$0	\$691,252	\$2,000,000	\$42,591,584
Napa	St. Helena Unified	St. Helena Elementary	52/66290-00-001	Multipurpose	2	K-6	\$274,494	\$274,494	\$0	\$575,543	\$43,167,127

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Note: Amounts shown have been adjusted per Regulation Section 1859.71

1. The District is not building Minimum Essential Facilities; however, the CDE has approved the reduced square footage.
2. Pending verification of addendum to agreement designating the school district ownership of the building.