

Charter School Facilities Program - Preliminary Apportionment Application Submittal Requirements

February 2025

The following items are necessary for a Charter School Facilities Program (CSFP) application package to be deemed complete by the Office of Public School Construction (OPSC) and the California School Finance Authority (CSFA):

All Application Types:

- Completed *Application for Charter School Preliminary Apportionment* (Form SAB 50-09)
This will require a resolution or other appropriate documentation from the applicant's governing board, supporting the submittal of the application. Date of resolution provided on Form SAB 50-09.
- Narrative description of the proposed project that includes at minimum the following information:
 - Number of classrooms to be rehabilitated or constructed
 - Grade level served in each classroom
 - Intended opening date
 - If the project will be permanent or portable construction
 - The Charter School General Location (the present charter school location address or the proposed address of where the project will be located, or, if using a 3-mile radius of where the project is located, the cross streets at the center of the radius)
- California Department of Education Preliminary Recommended Site Size Letter
- One copy of the most recently approved or renewed charter petition
- Minutes from the board meeting held by the chartering entity approving the most recent charter petition
- Verification of non-profit status, if applicable.
 - IRS 501(c)(3) determination letter, or
 - Articles of Incorporation showing the entity is organized as/operated by a nonprofit public benefit corporation
- Copy of notification(s) of the charter school's intent to apply sent to the superintendent and

governing board of the school district(s). The school district(s) where the project will be physically located and that serves the same grade level that will be housed in the charter project must be notified **(for charter schools applying independently only)**.

- Evidence that the charter school's notification to superintendent and governing board of the school district(s) of its intent to apply was received by the school district at least 30 days prior to the submission of the Form SAB 50-09 to OPSC **(for charter schools applying independently only)**.
- School resolution acknowledging the Proposition 2 requirement to submit the five-year school facilities master plan, or an updated version, at the time the *Application for Funding* (Form SAB 50-04) is submitted to convert the preliminary apportionment to a final apportionment. A sample resolution is available on OPSC's website **(for applications submitted by school districts only)**.
- CSFA - Financial Soundness Documents. Contact CSFA for required documents **(Submit directly to CSFA. Do not submit copies to OPSC)**

Rehabilitation Applications:

- Signed agreement between the charter school and the school district for the use of the facilities to be rehabilitated with funds provided by the CSFP. Must be approved by governing board of district prior to application submittal. **(for charter schools applying independently only)**

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- Site map with facilities to be rehabilitated identified and labeled. Site map must highlight toilet area and classrooms and indicate the grade levels served in each classroom.
- Drawings with dimensions of all facilities to be rehabilitated.
- Square footage spreadsheet listing all eligible facilities to be rehabilitated and their total enclosed exterior square footage amount. Facilities should be broken out into non-toilet facilities and toilet facilities. The totals for each category should match the request on the Form SAB 50-09.
- Documentation, such as Division of the State Architect approvals, verifying the age of the facilities to be rehabilitated

New Construction Applications:

- Appraisal or Preliminary Appraisal of the property to be acquired with a valuation date within six months of the application submittal date; or Median Cost valuation, consisting of county recorder documentation of consummated sales transactions, within the Charter School General Location; or title insurance company escrow instruction(s) for a minimum of 6 months and a maximum of 2 years from the application submittal date, 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 an editable spreadsheet summary of the data in a price per acre format that calculates a median cost per acre.
- A cost estimate for actual or historical site development costs, which reflects 100 percent of the proposed work, outlined in SFP Regulation Section 1859.76, and approved site development and off-site plans. Refer to SFP Regulation Section 1859.145 **(for projects requesting more than \$70,000 per proposed useable acres)**

- Department of Toxic Substances Control invoices or estimates for actual or historical costs. **(for projects requesting more than 15 percent of the property value)**
New construction applications submitted by Charter Schools will initially be accepted without the following documentation; however, it will be required to complete the application process:
- Completed Form SAB 50-01 to update the district's new construction eligibility (if a district has not established new construction eligibility, it will need to submit Forms SAB 50-01, 50-02, and 50-03 to do so.)
- Copy of the school district governing board's resolution certifying to the number of the district unhoused students the charter school project will house **(For charter schools applying independently only)**
- Copy of the school board meeting minutes that describe the discussion and approval of the certification resolution above **(For charter schools applying independently only)**
- Documentation that describes the method used to determine the number of unhoused students from the school district that would be included in the proposed charter school project **(For charter schools applying independently only)**
- Documentation that supports the number of school districts unhoused students reported by the district on the Form SAB 50-09 **(For district applicants only)**