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ABSTRACT

This overview examines California's various State Allocation Board's funding programs for the construction, modernization, and maintenance of local school facilities. Funding information is provided for each program as are explanations of the school facility program construction process and the lease purchase program. The organizational chart for the Office of Public School Construction concludes the document. (GR)

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OFFICE OF PUBLIC SCHOOL CONSTRUCTION

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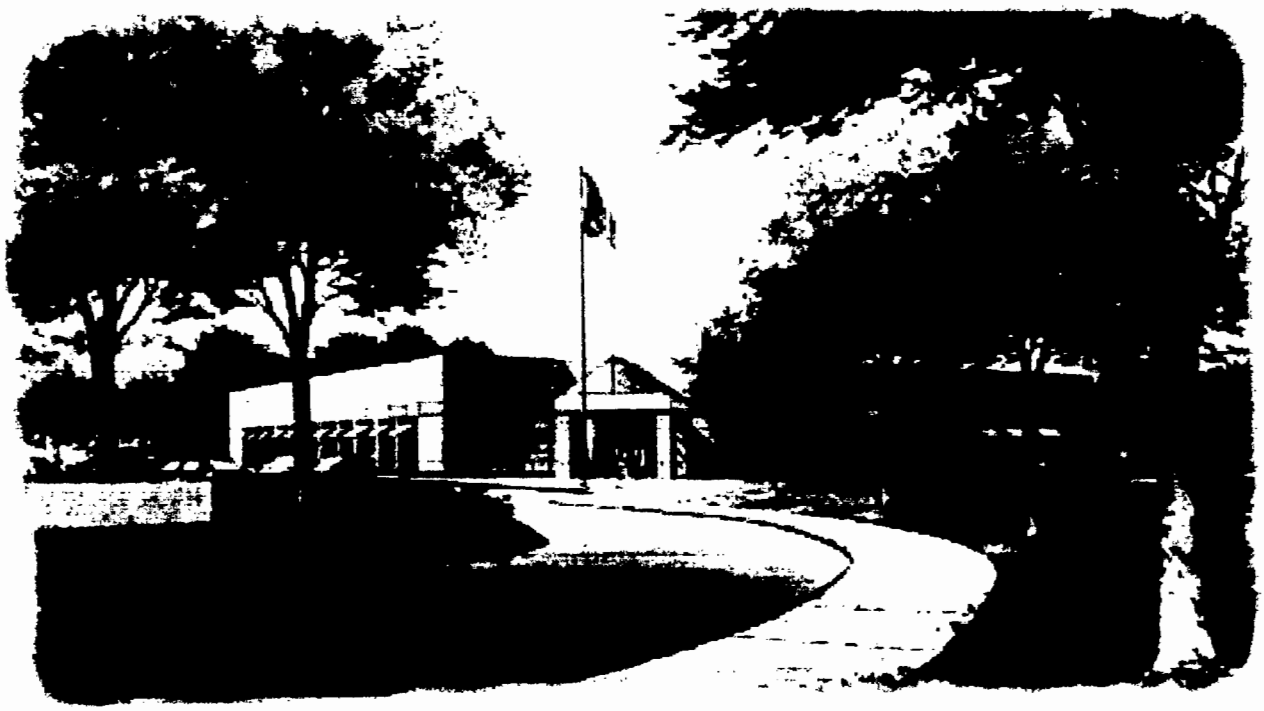
STATE SCHOOL FACILITY PROGRAMS OVERVIEW



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Programs Administered by the Office of Public School Construction for the State Allocation Board

- School Facility Program
  - New Construction
  - Modernization
- Deferred Maintenance Program
- State Relocatable Classroom Program
- Lease-Purchase Program
  - New Construction
  - Modernization/Reconstruction
  - Air Conditioning Program
- Unused Site Program
- Child Care Program
- Contract Registration

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San Diego Office

San Diego County Superintendent of Schools
6401 Linda Vista Road, Room 406
San Diego, CA 92111
Main Telephone Number ..... (619) 292-3598
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Organization

The State Allocation Board is responsible for allocating state resources used for the construction, modernization and maintenance of local school facilities. The Office of Public School Construction administers the Programs for the State Allocation Board.

State Allocation Board

Director of Finance ..... B. Timothy Gage
(Represented by Annette Porini)

Interim Director of General Services .... Clifford Allenby
(Represented by Karen McGagin)

Superintendent of Public Instruction ..... Delaine Eastin
(Represented by Duwayne Brooks)

Senate Member ..... Dede Alpert
Senate Member ..... Patrick Johnston

Assembly Member ..... Marco Firebaugh
Assembly Member ..... Scott Wildman

Executive Officer ..... Ted Dutton

Assistant Executive Officer ..... Bruce B. Hancock
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School Facility Program

The New Construction Grant

The New Construction program provides State funds on a 50/50 state and local sharing basis for public school capital facility projects in accordance with statute. Eligibility for State funding is based on a district's need to house pupils and is determined by criteria set in legislation (SB 50).

Education Code Section 17072.10 establishes the "new construction grant" per unhoused pupil for new construction projects. The State Allocation Board approved the annual adjustment to the grant on February 24,1999. The adjusted grants are as follows:

- $5,240 for each elementary school pupil.
- $5,542 for each middle school pupil (include 6 grade, if part of a 6-8 school).
- $7,255 for each high school pupil.

This "new construction grant" amount is intended to provide the State's share for all necessary project cost with the exception of site acquisition, utilities, off-site and service-site development. The necessary project cost include, but are not limited to, funding for design, the construction of the building, general-site development, education technology, unconventional energy, tests, inspections and furniture/equipment. The grant amounts are adjusted for inflation each year.

November 1998
School Bond Fund Breakout

FUNDS AVAILABLE AS OF NOVEMBER 4, 1998		
New Construction	$1,350,000,000	*
Modernization	800,000,000	*
Hardship	500,000,000	**
Class Size Reduction	700,000,000	**
Subtotal	$3,350,000,000	
ADDITIONAL FUNDS AVAILABLE JULY 1, 2000		
New Construction	$1,550,000,000	*
Modernization	1,300,000,000	*
Hardship	500,000,000	**
Subtotal	$3,350,000,000	
Grand Total	$6,700,000,000	

* Not Less Than
** Not More Than

Funding

Funds for this Program may be from any funding source made available to the State Allocation Board. This includes the State General Fund and proceeds from the sale of State General Obligation Bonds. In addition, districts are required to provide a portion of the cost of a project from funds available to the school district. This may include, among other sources, local general obligation bonds, developer fees, general fund, etc.

The Modernization Grant

The State Modernization Program provides State funds on a 80/20 basis for improvements to educationally enhanced school facilities. Projects eligible under this Program include such modifications as air conditioning, plumbing, lighting, and electrical systems. Site acquisition may not be included in modernization applications.

Education Code Section 17074.10 establishes the "modernization grant" for each pupil to be housed in buildings to be modernized. The State Allocation Board approved the annual adjustment to the grant on February 24,1999. The adjusted grants are as follows:

- $2,263 for each elementary school pupil.
- $2,394 for each middle school pupil.
- $3,134 for each high school pupil.

The "modernization grant" amount is intended to provide the State's share for all necessary project cost. The necessary project cost include, but are not limited to, funding for design, the modernization of the building, education technology, unconventional energy, tests, inspections and furniture/equipment. The grant amount is adjusted for inflation each year.

School Facility Program

Project Application Package

New Construction	Modernization
Enrollment Certification Projection	Eligibility Determination
Existing School Building Capacity	Application for Funding
Eligibility Determination	
Application Determination	*These forms are available on the*

School Facility Program Construction Process

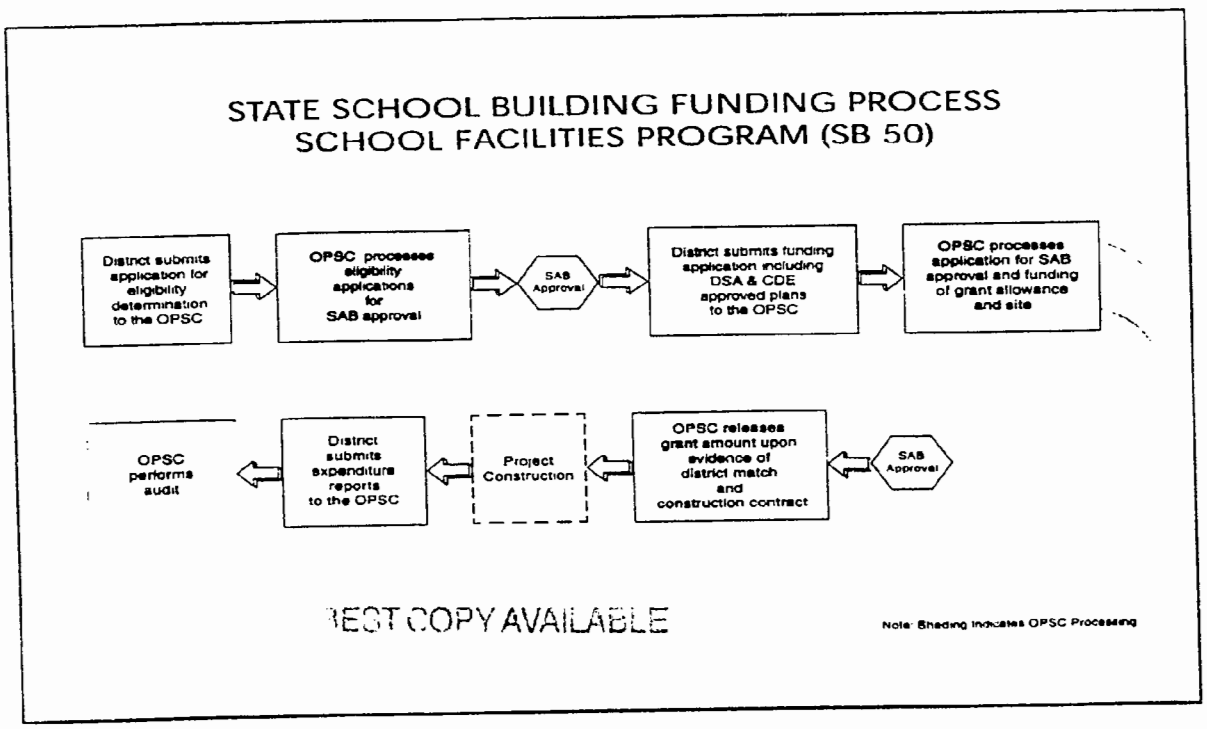
The process of constructing or modernizing a school building originates with and is the responsibility of the individual school district. The school district determines the type and size of the school building utilizing criteria set forth from the California Department of Education. The size is also determined by the number of students to be housed in the facility and consideration of health and safety issues designated by the appropriate State agencies. The school district should encourage and incorporate participation from the local community for input into the site location and design features. The school district usually utilizes community information workshops to generate community input and support. Dedication by the district and support from the community are as important as the site selection approval and acquisition process that may take one or more years.

In the meantime, the school district should have passed a local bond with a 66 2/3% majority vote or secured alternative funding for its share of the project. Without this funding, the school district cannot meet the 50% funding requirement for new construction and the 20% funding requirement for modernization projects.

A district may submit an application to the Office of Public School Construction for eligibility determination prior to commencing the project design.

The Office of Public School Construction will make every effort to process the eligibility application for State Allocation Board approval within 30-60 days. After the initial approval is attained, the district may proceed with the hiring of an architect for the development of plans and specifications for the school. Once the plans and specifications are completed by the architect, they are forwarded to the Division of the State Architect for processing. In order for the district to request construction funding, the district is required to verify that they have their 50/20% share of the project cost, stamped Division of the State Architect plans and approval of the site and plans by the California Department of Education. In the event the district is unable to share in the cost of the construction, the district can pursue financial assistance through the hardship provisions. Once the completed application is received, the Office of Public School Construction, will make every effort to process the application within 30-60 days and will present it to the State Allocation Board for consideration of approval.

With all approvals and funding in place, the actual construction time on an average school of 2,000 students, takes approximately two years. Total design development and construction time from concept to occupancy is between 2 to 4 years. However, portable school construction projects can be completed within 9 to 15 months from concept to occupancy.



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Relocatable Classroom Program

The State Relocatable Classroom Program is designed to meet classroom needs for those districts impacted by excessive growth or unforeseen classroom emergencies. The State Allocation Board allocates funds for the acquisition, installation and relocation of safe relocatable classroom facilities. The classrooms are leased to the school districts for up to $4,000 per year on a year-to-year basis. These 960 square foot facilities are insulated and air conditioned.

State Relocatable Classroom Program

Application Package

Eligibility Worksheet SAB 25-1	Application to Lease State Relocatable Classroom SAB 25-2

Funding

Funding for this Program may be from any funds available to the State Allocation Board. This may be from the State General Fund, lease and sale revenues, or from the proceeds from the sale of State General Obligation Bonds.

Deferred Maintenance Program

The State School Deferred Maintenance Program provides State matching funds, on a dollar-for-dollar basis, to assist school districts with expenditures for major repair or replacement of existing school building components. Typically, this includes plumbing, heating, air conditioning, electrical systems, roofing, interior/exterior painting, floor systems, etc. Funds are also provided for critical hardship projects if the work must be completed within one year.

Deferred Maintenance Program

Application Package

Five Year Plan SAB 40 -1	Critical Hardship Application SAB 40-5

Funding

Funding for this Program is generated from the amount of school district repayments under the State School Building Aid Program that exceed the amount necessary to service the indebtedness on State General Obligation Bonds sold and loaned to the districts for that Program. Additional funds are available from certain State School Site Utilization Funds and may be appropriated from the State General Fund.

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The State General Obligation Bond, Proposition 1A, passed by the voters on November 3, 1998, rendered the Lease-Purchase Program inoperative with the exception of certain grandfathered projects that met requirements to be funded under this Program. Although grandfathered projects may be processed according to Lease-Purchase Program policy, no new applications can be funded under this Program. The guidelines for projects to be grandfathered as Lease-Purchase projects or the School Facility Program are contained in California Code of Regulation, Sections 1859.11 through 1859.16.

Lease Purchase Program

New Construction

The Leroy F. Greene State School Building Lease-Purchase Law of 1976, also called the Lease-Purchase Program, provides State funds for public school capital facility projects in accordance with statute and State Allocation Board policy.

Eligibility for State funds is based upon a district's need to house current, as well as projected, enrollment and is determined by comparing the current space standards of the State Allocation Board to the total space available in the district.

Once eligibility is determined, current law specifies the amount of space, on a per pupil basis, which may be constructed with State funds. These "allowable building area standards", which are on a per square footage basis, vary per grade as well as by type of facility and are intended to provide space for classrooms, passing areas, school administration space, gymnasium, multi-purpose and other school subsidiary facilities.

Modernization/Reconstruction

The Lease-Purchase Modernization Program provides funds for improvements to educationally enhance permanent school facilities that are at least 30 years old and portable buildings that are 20 years old. Projects eligible under this Program include such modifications as air conditioning, plumbing, lighting, and electrical systems. Site acquisition may not be included in modernization applications.

To accomplish modernization, the Program provides funding of up to 25% of the current replacement value of the building. Additional funding is provided for planning, handicap access compliance, including elevators when appropriate, alternate energy systems for the structure, testing, inspection and furniture and equipment.

The Lease-Purchase Reconstruction Program, like the Modernization program, provides funding for improvements in school facilities at least 30 years old. However, the Reconstruction Program provides funding for structural improvements, as well as the traditional modernization improvements. The extra funding is available only when the reconstruction project will result in increased capacity of the facility being reconstructed. The total allowance is limited up to no more than 75% of the current replacement value of the building.

Summary of Bond Allocations & Deferred Maintenance Allocations 1986 - 1996

	November-86	June-88	November-88	June-90	November-90	June-92	November-92	March-96	Grand Total
Growth	680,000,000	585,000,000	682,000,000	630,000,000	631,000,000	1,403,000,000	678,000,000	1,127,800,000	6,416,800,000
Modernization	80,000,000	136,000,000	93,000,000	123,000,000	105,000,000	446,000,000	192,000,000	705,000,000	1,880,000,000
Ed-Tech-Counties	• • •	• • •	• • •	• • •	• • •	• • •	• • •	45,000,000	45,000,000
Air-Conditioning	40,000,000	26,000,000	• • •	33,000,000	44,000,000	49,600,000	12,000,000	26,800,000	230,800,000
State Relocatables	• • •	53,000,000	• • •	14,000,000	20,000,000	• • •	• • •	37,600,000	124,600,000
Asbestos	• • •	• • •	25,000,000	• • •	• • •	2,000,000	7,000,000	• • •	34,000,000
Northridge Earthquake	• • •	• • •	• • •	• • •	• • •	• • •	11,000,000	13,400,000	24,400,000
60/40	• • •	• • •	• • •	• • •	• • •	• • •	• • •	40,000,000	40,000,000
Roofs	• • •	• • •	• • •	• • •	• • •	• • •	• • •	30,000,000	30,000,000
Joint Use	• • •	• • •	• • •	• • •	• • •	• • •	• • •	25,000,000	25,000,000
Child Care	• • •	• • •	• • •	• • •	• • •	• • •	• • •	5,000,000	5,000,000
Contingency Reserve	• • •	• • •	• • •	• • •	• • •	• • •	• • •	19,000,000	19,000,000
Total Bond Funds	$800,000,000	$800,000,000	$800,000,000	$800,000,000	$800,000,000	$1,900,000,000	$900,000,000	$2,065,000,000	$8,865,000,000

Deferred Maintenance	88-89	89-90	90-91	91-92	92-93	93-94	94-95	95-96	96-97	97-98	Totals
Excess Repayments	51,800,000	54,000,000	49,900,000	46,500,000	53,600,000	47,500,000	44,600,000	40,500,000	35,356	29,201	$388,464,550
Other Legislation	23,000,000	23,000,000	23,000,000	22,400,000			24,700,000	50,000,000	100,000,000	115,000,000	$381,100,000

Lease Purchase Program

Growth - 535,552 Students Housed Modernization - 710,269 Students Housed Relocatable Classroom Program 175,590 Students Housed

Note: Administrative costs are less than 1%

Note: The State Allocation Board has a Disabled Veteran Business Enterprise policy which is applicable to the Lease-Purchase Program and the Relocatable Classroom Program. The policy does not apply to any other programs administered by the State Allocation Board. For additional information regarding the Disabled Veteran Business Enterprise policy please see our web site.

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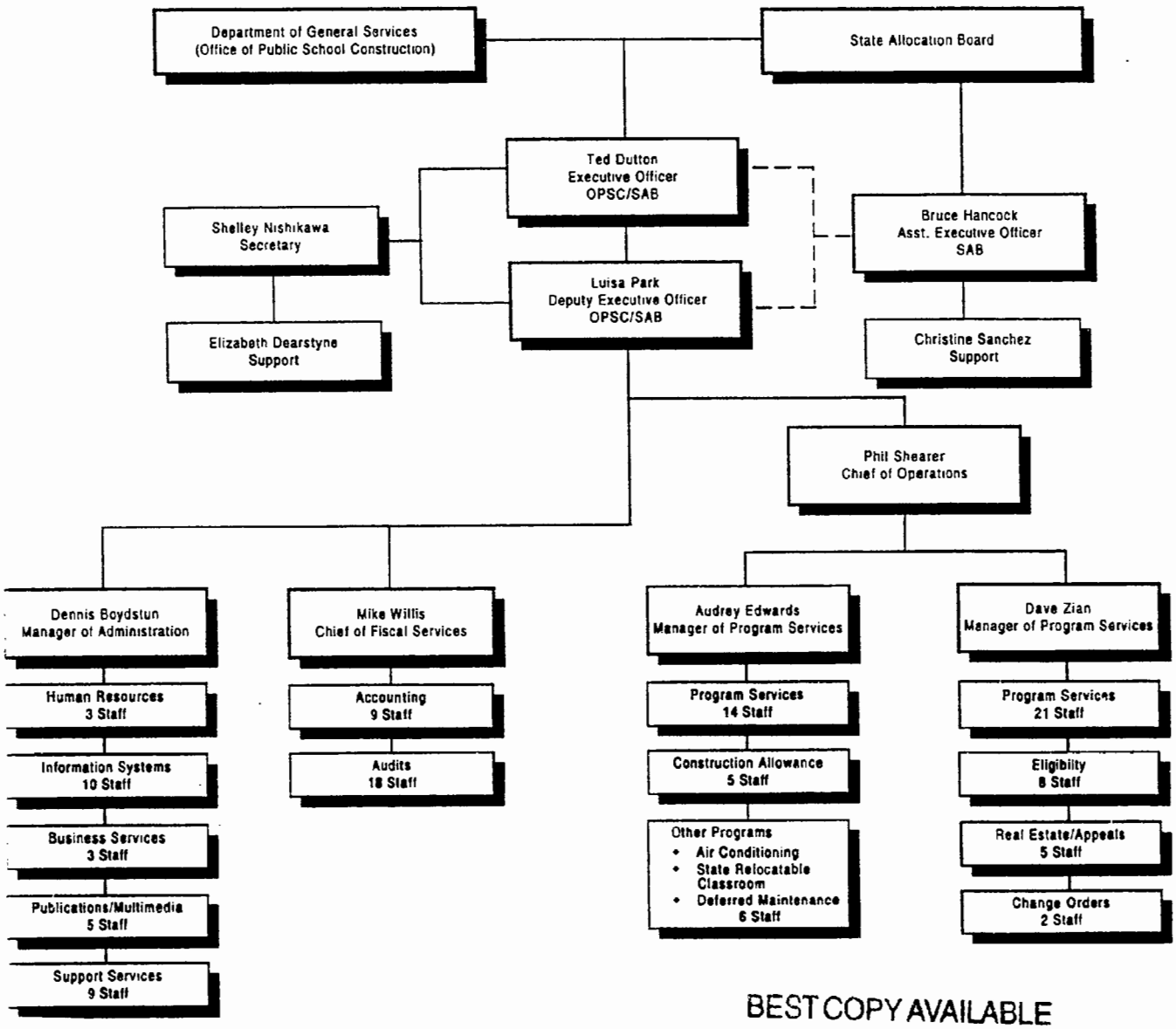
Office of Public School Construction Organizational Chart



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