



PLANNING

Preparing Your District for a Facilities Bond

A California-focused planning guide for building a defensible, fundable and deliverable facilities program before the ballot - with direct links to official OPSC, State Allocation Board, CDE and DSA resources.

FOR DISTRICT LEADERS

Use this guide as a planning and discussion framework. State-program rules change over time, and project-specific legal, election, procurement, accounting, accessibility, and regulatory requirements should be confirmed with the district's appropriate professionals. This guide does not address local election-law requirements; consult bond counsel for election-specific matters.

What this guide helps you do

- Build one current districtwide baseline before choosing the bond amount.
- Align the facilities master plan and project list with Proposition 2 / School Facility Program requirements.
- Use all-in project budgets, transparent priorities and realistic delivery sequencing.
- Plan state funding, CDE/DSA approvals, governance and financial controls before authorization.

Start with a state-ready facilities foundation

A facilities bond should begin with a defensible statement of need, not a target bond amount. The district should be able to explain what it owns, what condition those facilities are in, how enrollment and program needs affect capacity, what work is urgent versus long-range, and what funding sources may be available.

California's current School Facility Program framework makes this discipline even more important. Proposition 2 added a Five-Year School Facilities Master Plan requirement for participation in the School Facility Program for applicable applications. OPSC states that the plan must be governing-board approved and contain required elements, including an inventory of existing facilities, sites, and property.

OFFICIAL CALIFORNIA SOURCE

OPSC - Five-Year School Facilities Master Plans

[Open official source](#)

OFFICIAL CALIFORNIA SOURCE

OPSC/CDE/DSA - School Facility Program Guidelines for the Five-Year School Facilities Master Plan

[Open official source](#)

Build the bond program in nine readiness gates

A strong pre-bond process moves through a series of gates. Each gate should leave behind evidence that the district can use later for board decisions, community communication, state funding applications, design, and delivery.

1. Baseline	Current districtwide inventory, site data, enrollment/capacity, facility condition, accessibility and safety observations.	Creates one factual starting point across all campuses.
2. Master plan	Board-approved Five-Year School Facilities Master Plan or updated plan, when required for SFP participation.	Aligns long-range needs with the state funding framework.
3. Project definition	Candidate projects with purpose, scope, dependencies and assumptions.	Turns scattered deficiencies into work that can actually be designed and built.
4. Budget	All-in planning budgets with escalation, contingency and owner costs.	Prevents construction-only estimates from understating the program.
5. Funding stack	Local bond, state SFP participation, developer fees, grants and other resources identified separately.	Shows what the local bond must carry and where outside funding may supplement it.
6. Prioritization	Board-understandable criteria and documented rationale.	Supports transparent decisions when total need exceeds available funding.
7. Delivery capacity	Staffing, consultant support, procurement, DSA/CDE review, phasing and market capacity.	Tests whether the promised program can be delivered in the proposed time frame.
8. Controls	Project coding, budget control, change control, records and reporting protocols.	Builds accountability before spending begins.
9. Launch plan	First-wave projects, procurement calendar, state-funding milestones and cash-flow plan.	Allows the district to move immediately after authorization without improvising.

Understand how Proposition 2 changes pre-bond planning

The local bond and the state School Facility Program are separate funding mechanisms, but districts should plan them together. OPSC's Proposition 2 implementation materials and current School Facility Program regulations are the primary official sources for state matching and application requirements.

As of September 2026, OPSC reports that the State Allocation Board approved regulations implementing the Five-Year School Facilities Master Plan and that the regulations were approved by the Office of Administrative Law in May 2026. The due date for a master plan depends on the program, application type, and timing. Districts should verify the current requirements before filing.

OFFICIAL CALIFORNIA SOURCE

OPSC - Proposition 2 / Assembly Bill 247 implementation

[Open official source](#)

OFFICIAL CALIFORNIA SOURCE

OPSC - Laws and Regulations for SAB-Administered Programs

[Open official source](#)

Turn the needs inventory into a credible bond project list

Separate deficiencies from projects

A deficiency is a condition or need. A project is a coordinated scope that can be designed, reviewed, bid, phased and occupied. A district may bundle roofing, HVAC, electrical, accessibility and interior work into one modernization when coordination and disruption make that more practical.

Describe what each project is meant to accomplish

Each candidate project should state the facility problem, intended outcome, preliminary scope, affected site or buildings, dependencies, approximate delivery window, planning budget and major assumptions. This is detailed enough to support decisions without pretending the project is already designed.

Use CDE planning to connect facilities to educational program

CDE describes a facilities master plan as a working document used by the board and community to make informed facilities decisions. CDE resources also connect educational specifications, enrollment, site planning, utilization and facility evaluation to long-range planning.

OFFICIAL CALIFORNIA SOURCE

CDE - Master Plans Resources

[Open official source](#)

OFFICIAL CALIFORNIA SOURCE

CDE - Educational Specifications Resources

[Open official source](#)

Develop an all-in program budget

Planning budgets should distinguish construction from total project cost. Depending on the project, the full budget may need to address design and engineering, DSA/CDE review, testing and inspection, construction management, temporary facilities, technology, furniture/equipment, utilities, permits, contingency, escalation and other owner costs.

A project planned several years into a bond program should not be carried at today's construction price. The district should identify the base estimate date, escalation assumption and target construction year. It should also maintain separate design, construction and program contingencies so risk is visible rather than hidden in one number.

PLANNING DISCIPLINE

State agencies do not establish a single local-bond budgeting template. Use OPSC funding guidance and CDE/DSA requirements to identify likely state, educational and regulatory cost drivers, then apply a documented district budgeting method consistently.

Overlay state funding and approvals before the ballot

If a district expects to pursue state participation, identify likely SFP eligibility and application pathways before finalizing the local program. OPSC maintains separate New Construction and Modernization program pages, current forms, checklists, and regulations.

For state-funded projects, the process may require coordinated information from OPSC, CDE and DSA. OPSC's modernization checklist, for example, identifies a Project Tracking Number and references CDE final plan approval and DSA approval as application documentation for applicable modernization projects.

OFFICIAL CALIFORNIA SOURCE

OPSC - Modernization Funding

[Open official source](#)

OFFICIAL CALIFORNIA SOURCE

OPSC - New Construction Funding

[Open official source](#)

OFFICIAL CALIFORNIA SOURCE

CDE - Plan Submittal Process

[Open official source](#)

OFFICIAL CALIFORNIA SOURCE

DSA - Construction Project Submittal

[Open official source](#)

Prepare governance and accountability before money arrives

The best time to design project controls is before the first major contract. Establish who can authorize scope, budget and schedule changes; how projects will be coded; how commitments, expenditures and forecasts will be reconciled; how board reports will be produced; and how records will be retained.

If state funds are part of the plan, add the OPSC reporting requirements to the control framework. OPSC requires expenditure reporting for funded projects and provides the Form SAB 50-06, Detailed Listing of Project Expenditures and progress/audit guidance.

OFFICIAL CALIFORNIA SOURCE

OPSC - Forms (including SAB 50-06 and project expenditure schedules)

[Open official source](#)

OFFICIAL CALIFORNIA SOURCE

OPSC - Substantial Progress and Expenditure guidance

[Open official source](#)

What not to leave until after the election

- Waiting to verify state eligibility until after the project list is publicly committed.
- Using old master plan data without reconciling completed projects or changed enrollment.
- Publishing construction-only numbers as if they were total project budgets.
- Promising more projects in the first years than staff, designers, DSA review, procurement and contractors can realistically deliver.
- Failing to distinguish projects that depend on state participation from projects that can proceed with local funds alone.
- Entering the program without a controlled budget, schedule, decision, change and reporting structure.

IMPORTANT SCOPE NOTE

OPSC, SAB, CDE and DSA materials address facilities planning, state funding and school construction regulation. They do not replace bond counsel for local election law, ballot language, tax-rate statements, campaign rules or other election-specific requirements.

Frequently Asked Questions

Practical questions district leaders commonly ask when moving from planning into implementation.

Does Proposition 2 require every district to prepare a Five-Year School Facilities Master Plan?

OPSC states that the Master Plan is a condition of participating in the School Facility Program for applicable applications received on or after the Proposition 2 implementation date. The exact due date and documentation depend on program and application type; verify the current OPSC implementation table and regulations.

Does OPSC approve a district's local facilities bond?

No. OPSC administers the state School Facility Program on behalf of the State Allocation Board. The local bond process is separate. The value of OPSC guidance in pre-bond planning is that it helps a district align local projects with potential state participation and current state facility-planning requirements.

How detailed should the project list be before the ballot?

Detailed enough to support a credible scope, purpose, planning budget, sequencing and funding strategy, but not represented as final design. Keep assumptions visible and preserve the ability to refine projects through programming, design, agency review and procurement.

Should every campus receive the same dollar amount?

State guidance emphasizes planning from facility, program, enrollment, site and other needs rather than identical campus allocations. Districts should adopt transparent local criteria and document the rationale for differences.

When should CDE and DSA requirements enter the planning process?

Before a project budget and schedule are treated as reliable. CDE plan review and DSA plan review/certification can affect scope, documentation, schedule and cost. Early identification of these pathways reduces later surprises.

Can state funding be treated as guaranteed revenue in a local bond plan?

It is safer to show state participation as a separate assumption until eligibility, application status and apportionment are established. OPSC maintains the official program rules, forms and current funding procedures.

What should happen immediately after local authorization?

Confirm governance, update first-wave scopes and budgets, launch required professional-service procurements, establish state-funding milestones, begin surveys/investigations, and publish the program controls and reporting cadence.

How often should the facilities plan be updated?

OPSC requires updates to reflect changes in enrollment, capacity or other areas as appropriate for SFP participation. CDE also characterizes a facilities master plan as a working document that should be monitored and updated.

What is the most common planning mistake?

Treating the bond as a list of desired projects instead of an integrated capital program with evidence of need, all-in budgets, funding assumptions, delivery capacity and control systems.

Where should staff check for current rules?

Use the current OPSC School Facility Program regulations, Proposition 2 implementation page, Master Plan page, CDE facilities pages and DSA project guidance - not saved copies of old forms or summaries.

Questions to Ask Next

- Do we have one current districtwide facility baseline?
- Is our Five-Year Master Plan current and board approved where required?
- Can we explain every proposed project in one paragraph and show the evidence behind it?
- Are budgets all-in and escalated to the likely delivery year?
- Which projects assume state participation, and what happens if that funding is delayed or unavailable?
- Can our staffing, consultants and agency-review schedule support the promised delivery pace?
- Are project controls and reporting procedures ready before the first contract is issued?

VALLEY OAK PROJECT ADVISORS

We help school districts translate facility needs into clear, financially responsible, and deliverable capital programs - from assessments and master planning through project delivery and closeout.

Official California Resources

Every link below goes directly to an official California state source from OPSC, the State Allocation Board, CDE, or DSA.

OPSC	Five-Year School Facilities Master Plans Current implementation information, due dates, board resolutions, checklist and guidelines. Open source
OPSC/CDE/DSA	Five-Year Master Plan Guidelines Joint guidance for developing the required plan and inventory. Open source
OPSC / SAB	Proposition 2 - Assembly Bill 247 Implementation history, stakeholder materials and current Proposition 2 resources. Open source
OPSC / SAB	SFP Laws and Regulations Current approved regulations and pending regulatory changes. Open source
OPSC	Modernization Funding Eligibility, forms, checklists and application resources. Open source
OPSC	New Construction Funding Eligibility, capacity and application resources. Open source
CDE	Master Plans Resources CDE facilities master planning publications and references. Open source
CDE	Educational Specifications Resources Resources linking facility design to educational program. Open source
DSA	Construction Project Submittal DSA jurisdiction, design professional responsibility and submittal guidance. Open source
OPSC / SAB	State Allocation Board Agendas Official Board agendas, supporting documents, transcripts and webcasts. Open source

Source note: This guide intentionally limits external references to the California Office of Public School Construction (OPSC), State Allocation Board materials hosted by OPSC, the California Department of Education (CDE), and the Division of the State Architect (DSA).

Prepared September 2026. Always verify the current version of forms, regulations, and agency guidance before acting.