PLANNING

Turning a Facilities Master Plan Into a Project List

A step-by-step framework for converting facility inventories, assessments, enrollment, program needs and funding assumptions into a prioritized, costed and maintainable capital improvement program.

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.

What this guide helps you do

- Preserve the full universe of need while identifying the funded subset.
- Trace every project back to specific observations and planning evidence.
- Bundle work into constructible scopes and test multiple funding scenarios.
- Maintain the project list as a living dataset tied to the Five-Year Master Plan.

Know what the Master Plan now means for state participation

Under Proposition 2, OPSC states that applicable School Facility Program participants must submit a board-approved Five-Year School Facilities Master Plan or updated plan. The plan must include required minimum elements, including an inventory of existing facilities, sites and property. OPSC, CDE and DSA jointly developed guidelines to help districts prepare the plan.

That means the modern facilities master plan should not end with narrative recommendations. It should produce a data structure and decision process that can be converted into a prioritized, costed and deliverable capital improvement program.

OFFICIAL CALIFORNIA SOURCE

OPSC - Five-Year School Facilities Master Plans
Open official source

OFFICIAL CALIFORNIA SOURCE

OPSC/CDE/DSA - Five-Year Master Plan Guidelines
Open official source

Use a clear hierarchy from observation to funded project

The most important transformation in master planning is moving from thousands of observations to a manageable capital program without losing the underlying evidence.

Asset / space	What physically exists at a site.	Building A roof; Classroom 12 HVAC; main electrical service.
Observation / deficiency	A condition, constraint or need.	Roof membrane near end of life; inadequate cooling; inaccessible path.
Candidate project	A constructible grouping of related needs.	Building A envelope and HVAC modernization.
Program scenario	A set of projects tested against funding and schedule assumptions.	Critical-needs scenario; state-match scenario; 10-year modernization scenario.
Funded capital program	Projects authorized for a defined funding source/time period.	Bond Phase 1 / SFP modernization package.

Normalize the needs before ranking them

Needs may come from facility assessments, roof studies, accessibility reviews, site requests, technology plans, work orders, enrollment studies and prior master plans. Reconcile duplicates, remove or mark completed work, normalize naming and cost dates, and make sure different campuses are being compared using equivalent criteria.

Preserve the full universe of need

Do not delete a need simply because the current bond cannot fund it. Keep the complete backlog, then identify the subset of projects selected for the current capital program. This preserves transparency and gives the next planning cycle a valid starting point.

Connect priorities to both technical need and district policy

A prioritization framework can combine condition, risk, health/life safety, accessibility, operational impact, educational program, enrollment/capacity, prior investment, funding opportunity, project readiness and ability to bundle work. The exact weights are a local decision; the value is the documented rationale and consistent use.

Scoring should support judgment, not replace it. Review outliers and document justified exceptions. If leadership changes the sequence for a valid reason - for example, a state-funding window or campus-phasing dependency - record that reason.

OFFICIAL CALIFORNIA SOURCE

CDE - Master Plans Resources
Open official source

OFFICIAL CALIFORNIA SOURCE

CDE - Educational Specifications Resources
Open official source

Bundle deficiencies into projects that can actually be delivered

Related work may be bundled by site, building, system, delivery window or disruption. If ceilings are opened for HVAC work, it may be efficient to coordinate lighting, fire alarm, technology or accessibility work. Conversely, combining too much work can create a project that is difficult to phase, too large for available funding or too disruptive to school operations.

Test each candidate project

- Does the scope have a clear purpose?
- Are dependencies known?
- Can it be designed and reviewed as one package?
- Can construction be phased around school operations?
- Does the scope align with potential state eligibility?
- Is the project size appropriate for the likely procurement market?
- Can the district staff and consultant team manage it?

Build all-in planning budgets and funding scenarios

Each candidate project should have an all-in planning budget tied to an anticipated delivery year. Show base construction cost and the assumptions for contractor markups, bonds/insurance, design, CM, testing/inspection, agency costs, temporary facilities, contingency, escalation, technology and other owner costs.

Then create scenarios instead of one brittle list. A district might compare a critical-needs scenario, a broader modernization scenario, a local-bond-only scenario and a scenario that assumes state participation. This makes the consequences of funding assumptions visible.

OFFICIAL CALIFORNIA SOURCE

OPSC - Modernization Funding
Open official source

OFFICIAL CALIFORNIA SOURCE

OPSC - New Construction Funding
Open official source

Use CDE planning to test program, capacity and site assumptions

CDE facilities planning resources emphasize that school facility planning should be tied to educational programs, enrollment, capacity, site planning and long-range implementation. This matters when the project list includes classroom additions, reconfiguration, replacement, school consolidation, new sites or major program shifts.

OFFICIAL CALIFORNIA SOURCE

CDE - Guide to Development of Long-Range Facilities Plan
Open official source

OFFICIAL CALIFORNIA SOURCE

CDE - Guide to School Site Analysis and Development
Open official source

Turn the final list into a living capital improvement program

The project list should be a maintainable dataset, not just a PDF table. Useful fields include site, project ID, purpose, scope, source deficiencies, priority, planning budget, estimate date, target design/construction years, funding source, state-funding status, dependencies, project status and major assumptions.

When projects are completed, update the source facility records so the backlog decreases and asset information improves. Add future studies and assessments to the same facility profile. A living system avoids paying repeatedly to rediscover information already collected.

Project completed	Mark source deficiencies complete; update asset age/condition and final cost.
New assessment/study	Add findings without deleting prior history; reconcile duplicates.
Enrollment/capacity change	Revisit projects driven by growth, underutilization or program location.
State funding change	Update funding assumptions, timing and match scenarios.
Bid/market change	Refresh escalation and affordability scenarios.
Board priority change	Document decision and preserve prior ranking/history.

Frequently Asked Questions

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

Does every item in a Master Plan become a capital project?

No. Some needs are maintenance, some should be monitored, some can be bundled and some remain long-range. The project list is the deliberate conversion of needs into deliverable scopes.

What does Proposition 2 require from the Five-Year Master Plan?

OPSC identifies required minimum elements and an inventory requirement for applicable SFP participation. Use the current OPSC Master Plan page, guidelines, regulations and SAB 50-MP checklist for the exact current requirements.

Who should set priorities?

Technical staff and consultants can develop data and options, but priorities should reflect district leadership and governing-board policy. Community and site input can inform the process without replacing technical and fiscal due diligence.

Should a scoring formula automatically choose the project list?

No. Use scoring as a decision-support tool. Review outliers, sequencing dependencies and funding opportunities, and document justified exceptions.

How should equity be handled?

Define it explicitly. Possible dimensions include condition, prior investment, access to comparable facilities, student/program needs and the effect of deficiencies on educational opportunity.

How do we decide whether to bundle work?

Consider shared mobilization, dependencies, disruption, phasing, funding rules, design efficiency and market capacity. Bundle when it reduces cost/risk or improves coordination - not just to make a project larger.

What if total need is several times larger than available funding?

Keep the full needs inventory, identify critical and near-term projects, create funding scenarios, phase work and preserve unfunded needs for future updates.

How should state funding affect project sequencing?

Track state eligibility, application readiness, approvals and timing as separate project fields. A project with a state-funding opportunity may reasonably move in sequence if leadership documents the rationale.

What information should accompany each project?

Site, purpose, preliminary scope, source needs, priority/rationale, all-in planning budget, estimate date, assumptions, anticipated timing, funding strategy and dependencies.

How often should the project list change?

Review it regularly and update when condition, cost, enrollment, funding or completed work materially changes. Use a controlled update process so changes are traceable rather than appearing arbitrary.

Questions to Ask Next

- Is the needs inventory current, normalized and free of duplicate/completed work?
- Can every project be traced back to specific needs?
- Can we explain the prioritization criteria and documented exceptions?
- Are project budgets all-in and tied to likely construction years?
- Have we tested local-only and state-participation funding scenarios?
- Do capacity, enrollment and educational program assumptions support the project?
- Can the list be updated without rebuilding the Master Plan from scratch?
- Does completed work feed back into the facility inventory?

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** Required plan, implementation timelines, sample resolutions and checklist. Open source
OPSC/CDE/DSA	**Five-Year Master Plan Guidelines** Official joint guidance for the plan and facility inventory. Open source
OPSC / SAB	**SFP Laws and Regulations** Current regulatory requirements. Open source
CDE	**Master Plans Resources** CDE facilities-master-plan guidance and publications. Open source
CDE	**Long-Range Facilities Plan Guide** Framework for facilities evaluation, demographics and implementation. Open source
CDE	**Educational Specifications Resources** Educational program and facility planning linkage. Open source
CDE	**Guide to School Site Analysis and Development** Site master planning and utilization guidance. Open source
OPSC	**Modernization Funding** State modernization eligibility and application resources. Open source
OPSC	**New Construction Funding** State new-construction eligibility and application resources. 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.