



FISCAL / PLANNING

What a Facilities Condition Assessment Should Tell You

A deeper framework for turning physical conditions into usable district data, capital forecasts and master-planning decisions - grounded in California state facilities planning and school-construction 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.

What this guide helps you do

- Create a consistent asset-level inventory across every campus.
- Separate observed condition from assumptions and further investigation.
- Connect condition data to educational use, capacity, accessibility, DSA status and cost.
- Deliver an editable dataset that becomes part of the district's living facilities record.

Place the FCA inside the master-planning system

A facilities condition assessment (FCA) is most useful when it is not a stand-alone report. It should be the physical-condition layer of a broader facilities planning system that also includes enrollment, capacity, educational program, site conditions, accessibility, regulatory status, funding and implementation.

OPSC's Five-Year School Facilities Master Plan framework requires an inventory of existing facilities, sites and property. CDE's master-planning resources likewise emphasize evaluating facility utilization and condition as part of long-range planning. Neither source prescribes one universal FCA scoring formula; districts should therefore document the assessment method they choose and apply it consistently.

OFFICIAL CALIFORNIA SOURCE

OPSC - Five-Year School Facilities Master Plans

[Open official source](#)

OFFICIAL CALIFORNIA SOURCE

CDE - Guide to Development of Long-Range Facilities Plan

[Open official source](#)

The minimum dataset should answer six questions

For every significant building, site and system, the district should be able to answer the same core questions. The exact field set can be tailored, but consistency across campuses is essential.

What is it?	Asset/system type, component, building/site, quantity, manufacturer/model when useful.	Creates a searchable inventory and avoids repeated rediscovery.
Where is it?	Campus, building, room/zone, map/GIS reference.	Supports work planning, inspections and future updates.
What condition is it in?	Observed condition, deficiency, photos, maintenance history, risk, notes.	Supports prioritization and validation.
When will it need work?	Install year if known, expected service life, remaining-useful-life estimate, urgency/time horizon.	Moves the district from backlog to forecast.
What should be done?	Repair, replace, investigate, monitor, code/accessibility correction, coordinated modernization.	Turns observations into actionable recommendations.
What might it cost?	Quantity, unit cost basis, deficiency cost, project-level markups/soft costs, escalation assumptions.	Allows capital forecasting and scenario planning.

Separate observed facts, assumptions and further investigation

An FCA is typically visual and records-based. It should not imply destructive testing or certainty about concealed conditions unless that work was actually performed. The data model should distinguish confirmed facts from estimated age, assumed quantities, inferred remaining life and items requiring specialty investigation.

This distinction is especially important when an assessment will be used to build a bond program or state-funding strategy. A planning estimate can be useful without being falsely precise. Document the estimate date, cost basis, exclusions and confidence level.

RECOMMENDED PRACTICE

State master-plan sources establish the need for facility inventories and planning information, but they do not mandate one condition-rating scale or one Facility Condition Index formula. If the district uses an FCI or numerical score, define the calculation and thresholds in the report itself.

Connect physical condition to educational use, site and capacity

Physical condition is only one dimension of facility need. CDE planning resources connect facilities to educational specifications, program needs, site planning, enrollment and capacity. A building can be physically sound but functionally poor for current instruction; conversely, a heavily used facility may have a critical system failure even if its overall condition score appears moderate.

Keep the dimensions distinct

- Condition: physical state and serviceability of systems.
- Functionality: how well the space supports educational and operational use.
- Capacity/utilization: how enrollment and program loads fit the available space.
- Accessibility and safety: code or regulatory conditions that may require action independent of general condition.
- Site performance: circulation, drainage, parking, drop-off, play/athletic areas and other site constraints.

OFFICIAL CALIFORNIA SOURCE

CDE - School Facilities

[Open official source](#)

OFFICIAL CALIFORNIA SOURCE

CDE - Educational Specifications

[Open official source](#)

OFFICIAL CALIFORNIA SOURCE

CDE - Guide to School Site Analysis and Development

[Open official source](#)

Do not ignore DSA project and certification status

For California public K-12 facilities, the district's asset record should connect major capital work to DSA project information where applicable. DSA explains that school construction under its jurisdiction requires certification and that uncertified construction can affect future DSA approvals associated with the facility.

An FCA does not replace a DSA record review, but a mature district facility database can flag known DSA application numbers, certification status, major approved projects and record locations. This helps the capital plan distinguish a condition problem from a documentation/certification issue that requires a different response.

OFFICIAL CALIFORNIA SOURCE

DSA - Construction Projects and Project Certification

[Open official source](#)

OFFICIAL CALIFORNIA SOURCE

DSA - Project Certification

[Open official source](#)

Translate deficiencies into a transparent cost model

A useful assessment should explain how a deficiency-level cost becomes a project-level planning budget. Quantity multiplied by unit cost may establish a base deficiency cost, but the capital program may also need general conditions, contractor markups, bonds/insurance, design, testing, inspection, construction management, temporary facilities, contingency and escalation.

Keep these layers visible. Leadership should be able to see the direct deficiency cost, the project budget and the assumptions that connect them. When costs are updated, preserve the estimate date and index/escalation basis so changes are traceable.

Recommended time horizons

Organizing needs into immediate, near-term and long-term windows helps the district see future replacement waves. Common planning windows include immediate/urgent, 1 year, 2-5 years, 6-10 years and 11-15 years. These windows are planning conventions rather than a state-mandated FCA format.

STATE-PLAN CONNECTION

OPSC's current Five-Year Master Plan requirement makes it especially important to identify near-term facility needs and to keep the underlying inventory updateable beyond a single assessment cycle.

Deliver data the district can maintain

The final product should not be a static binder. The district should receive the underlying data in an editable format, a clear data dictionary, the cost methodology, photo references and instructions for updating records. If a dashboard or hosted software is used, ownership, export rights, attachment export, retention and long-term access should be understood.

Districtwide inventory	One consistent field structure for all campuses and major systems.
Condition observations	Concise, location-specific notes with supporting photographs and clear condition definitions.
Priorities/time horizons	A documented method that lets staff filter urgent, near-term and long-range needs.
Cost model	Transparent assumptions and separation of deficiency cost from all-in project budget.
Source records	Links or references to drawings, DSA projects, prior studies, warranties and maintenance data when available.
Update process	Defined ownership, naming conventions and a practical way to mark completed work and add new studies.

Quality-control the FCA before accepting it

- Sample-check multiple campuses to verify assessors applied ratings consistently.
- Reconcile obvious discrepancies between work-order history and assessment findings.
- Confirm that photos and observations are tied to locations and assets, not just site-level folders.
- Review large-cost items and unusually high/low scores with maintenance and facilities staff.
- Verify cost markups, escalation and estimate dates are documented.
- Check that completed projects are not still counted as deficiencies.
- Confirm the district can export and update all underlying data after the consultant leaves.

Frequently Asked Questions

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

Is an FCA the same as a Five-Year School Facilities Master Plan?

No. The FCA focuses on existing physical conditions and renewal needs. OPSC/CDE master-plan guidance is broader and includes facility inventory plus planning topics such as enrollment, capacity, educational program and implementation.

Does California require a specific FCA scoring scale?

The official OPSC/CDE master-plan sources used in this guide do not prescribe one universal FCA condition scale. Districts can use qualitative or numerical ratings, but the definitions should be explicit and applied consistently.

Does California require a specific Facility Condition Index formula?

The official sources cited here emphasize inventory, condition and planning information rather than a single mandated FCI formula. If a district uses FCI, it should document the denominator, cost basis, thresholds and limitations.

Should the FCA include educational adequacy?

It can, but label it separately from physical condition. CDE educational-specification and master-planning resources support evaluating how facilities serve the educational program.

How should unknown installation dates be handled?

Record the date as unknown and identify the basis for any estimate - labels, records, prior projects, observed condition or staff knowledge. Assumptions should never be presented as confirmed facts.

Should work orders be included?

Yes, where useful. Recurring work orders can identify chronic failures or maintenance burden. Reconcile them to the same site/building/asset identifiers so they become part of one facility record.

How should accessibility and life-safety issues be treated?

Do not bury them inside an overall condition score. Flag them separately and coordinate with qualified professionals. DSA is the official source for applicable school construction review, accessibility, structural safety and fire/life-safety processes.

What should the district receive at the end?

At minimum: findings, supporting documentation, cost methodology, prioritization/time-horizon logic and the usable underlying data. Hosted systems should include clear export and ownership provisions.

How often should an FCA be updated?

Keep the dataset current as projects are completed and conditions change, with periodic comprehensive reassessment. OPSC also expects Master Plans to be updated as relevant conditions such as enrollment and capacity change.

What makes an FCA useful for bond planning?

A consistent districtwide dataset, transparent cost assumptions, time horizons and the ability to turn individual deficiencies into constructible project scopes.

Questions to Ask Next

- Can we identify every major system by campus, building and location?
- Do condition ratings mean the same thing from one assessor and campus to another?
- Which findings are observed facts and which are assumptions?
- Can we see urgent, 1-year, 5-year, 10-year and longer-term needs?
- Are cost assumptions and markups transparent?
- Can we connect major capital work to DSA project/certification records?
- Can staff update the dataset after work is completed?
- Can leadership drill from a district summary to the specific observation and photo behind the number?

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

Official Proposition 2 Master Plan requirements and implementation resources.

[Open source](#)

OPSC/CDE/DSA

Five-Year Master Plan Guidelines

Joint guidance for facility inventory and master-plan development.

[Open source](#)

CDE

Guide to Development of Long-Range Facilities Plan

CDE framework for educational facilities evaluation, capacity, demographics and implementation.

[Open source](#)

CDE

Master Plans Resources

Current facilities-master-planning resources.

[Open source](#)

CDE

Educational Specifications Resources

Links educational program requirements to facility planning.

[Open source](#)

CDE

Guide to School Site Analysis and Development

Site planning, site master plan and educational-program considerations.

[Open source](#)

DSA

Project Certification for Schools

Official certification process and project record requirements.

[Open source](#)

DSA

Construction Projects for Schools

Certification responsibilities and consequences of uncertified work.

[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.