



Board Agenda Item #:	IV A – Action Item
Date:	October 10, 2019
To:	Magnolia Educational & Research Foundation dba Magnolia Public Schools (“MPS”) Board of Directors (“MPS Board”)
From:	Alfredo Rubalcava, CEO & Superintendent
Staff Lead:	Patrick Ontiveros, Director of Facilities and General Counsel
RE:	Los Angeles Unified School District (“LAUSD”) Over-Allocation Fees

## I. Proposed Recommendation

MPS Staff recommends, and believes that it is in the best interests of MPS, that the MPS Board approve and authorize MPS Staff to pay to the LAUSD over-allocation fees in the total amount of \$527,933.01 consisting of \$244,506.50 for MSA-3, \$219,663.36 for MSA-4, and \$63,763.15 for MSA-5 as set forth below. The fees will be paid from each school’s long term reserves.

MPS School	School Year			Total
	2016-17	2017-18	2018-19	
<b>MSA-3</b>	\$159,717.60	\$84,788.90		\$244,506.50
<b>MSA-4</b>	\$219,663.36			\$219,663.36
<b>MSA-5</b>	\$26,651.52		\$37,111.63	\$63,763.15
				<b>\$527,933.01</b>

## II. Background

Each of MSA-3, MSA-4 and MSA-5 are co-located on the LAUSD campuses pursuant to Proposition 39. Proposition 39 is the California State law that requires school districts to share public school facilities “fairly among all public school pupils, including those in charter schools.” See Exhibit A for a summary of Proposition 39.



On September 20, 2019, each of MSA-3, MSA-4 and MSA-5 received a letter from the Office of the Chief Financial Officer of the LAUSD regarding fees for proposition 39 over-allocated space in the 2016-17, 2017-18, and 2018-19 school years. Copies of the letters are attached – MSA-3’s letters are attached as Exhibits B-1 and B-2, MSA-4’s letter is attached as Exhibit C, and MSA-5’s letters are attached as Exhibits D-1 and D-2.

State law controls a charter school's mandatory reimbursement obligations to the school district for overallocated Proposition 39 space. Pursuant to Education Code Section 47614, subdivision (b)(2), if a charter school generated less in-district classroom average daily attendance (“ADA”) than it projected for the Applicable School Year, the charter school “shall reimburse the district for the over-allocated space at rates to be set by the State Board of Education.” California Code of Regulations, Title 5, Section 11969.2, Subdivision (c) describes how “in-district students” are calculated.

The California Code of Regulations dictates how over-allocated space is to be calculated. California Code of Regulations, Title 5, Section 11969.8, Subdivision (a), provides that “[s]pace is considered to be over-allocated if (1) charter school's actual in-district classroom ADA is less than the projected in-district classroom ADA upon which the facility allocation was based, and (2) the difference is greater than or equal to a threshold ADA amount of 25 ADA or 10 percent of projected in-district classroom ADA, whichever is greater.” The reimbursement amount owed by the charter school to the district for over allocated space for the applicable school year is calculated using a per-pupil rate determined by the California Department of Education. California Code of Regulations, Title 5, Section 119691.1 *et al* is attached as Exhibit E.

In the case of each of MSA-3, -4, and -5, the projected in-district classroom ADA was calculated by applying the projection identified in the LAUSD’s final notification of space offered. In compliance with California Code of Regulations, Title 5, Section 11969.8, Subdivision (a), actual in-district classroom ADA was determined using the report submitted by each school pursuant to Section 11969.9(l) in conjunction with the second principal apportionment under Education Code Section 41601.

MPS staff has determined that the estimated and actual in-district classroom ADA numbers set forth in each of the letters received for MSA-3, -4, and -5 are accurate.

### III. Budget Impacts

The aforementioned amounts will be paid by each school from its own long term reserves. Below is the projected balance of each school's reserves based on Unaudited Actuals Report FY 2018-19.

School	Reserves per UA	Fees	Balance after Fees
MSA-3	\$ 1,082,472.00	\$244,506.50	\$836,965.50
MSA-4	\$ 1,322,728.00	\$219,663.36	\$1,103,064.64
MSA-5	\$ 1,782,008.00	\$63,763.15	\$1,718,244.85



## **Exhibit A**

### **Prop 39 One Page Information Sheet**



# Proposition 39 Charter School Facilities Requests

## FACT SHEET

### PROPOSITION 39, THE LAW

Proposition 39 was approved by California's voters in November 2000, and as a result, amended California Education Code Section 47614. Under Proposition 39, school districts are required by state law to share public school facilities "fairly among all public school pupils, including those in charter schools."

### CHARTER SCHOOL FACILITIES REQUESTS

Each year the Los Angeles Unified School District (LAUSD) must undergo a space identification process to meet Proposition 39 facilities requests submitted by charter schools.

#### Eligibility Requirements

Charter schools must meet certain eligibility requirements when making facilities requests to the District. Charter schools must:

- Submit a written facilities request
  - An existing charter school must submit a written request by November 1.
  - A new charter school must submit a written request by November 1. However, a new charter school is eligible to request facilities *only if* it submitted its charter petition to the school district in which it operates on or before November 1 *and* received approval of the charter petition before March 15.

A charter petition is a proposal to create a new school or renew the charter of an existing charter school. If a charter petition is not approved by the school district, the charter school may appeal to the County and the State.
- Operate within the geographic boundaries of the District
  - Education Code 47614 defines the term operating as "having identified at least 80 In-District Students who are meaningfully interested in enrolling in the charter school for the following year."
  - In-District Students are students that reside within the school district's boundaries.
- Provide LAUSD with a reasonable projection of the charter school's Average Daily Attendance (ADA) of at least 80 In-District Students for the following year.
  - Documentation to support the projected ADA would be completed by parents/guardians and can include *Meaningfully Interested Students Information Forms* or *Intent to Re/Enroll Forms* or other *list(s)* of in-district students who are "meaningfully interested" in attending the charter school.

The Proposition 39 Facilities Request Cycle occurs on a yearly basis. The dates that must be met are provided in the Regulatory Timeline.

### REGULATORY TIMELINE

#### NOVEMBER 1

Charter Schools submit written requests for facilities including projected Average Daily Attendance (ADA).

#### DECEMBER 1

District reviews Charters' ADA projections and agrees, or objects and responds with projections the District considers reasonable.

#### JANUARY 2

Charter Schools respond to District's ADA projections.

#### FEBRUARY 1

District makes preliminary proposals to Charter Schools with eligible facilities requests.

#### MARCH 1

Charter Schools respond to preliminary proposals.

#### APRIL 1

District makes final offers to Charter Schools.

#### MAY 1

Charter Schools must notify the District in writing to accept or decline the final offer by May 1 or 30 days from its receipt of final offer.

#### 10 DAYS

If final offers are accepted, Charter Schools occupy sites 10 working days prior to their first day of school instruction.

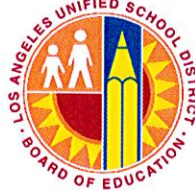


## **Exhibit B-1**

# **MSA-3 2016-17 OVER-ALLOCATION LETTER**

**MEMBERS OF THE BOARD**

**DR. RICHARD A. VLADOVIC, PRESIDENT**  
**MÓNICA GARCÍA**  
**JACKIE GOLDBERG**  
**KELLY GONEZ**  
**DR. GEORGE J. MCKENNA III**  
**NICK MELVOIN**  
**SCOTT M. SCHMERELSON**



**LOS ANGELES UNIFIED SCHOOL DISTRICT**

**AUSTIN BEUTNER**  
Superintendent

**MEGAN K. REILLY**  
Deputy Superintendent

**V. LUIS BUENDIA**  
Interim Chief Financial Officer

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E-mail ([sdaniel@magnoliapublicschools.org](mailto:sdaniel@magnoliapublicschools.org))

September 20, 2019

Shandrea Daniel, Principal  
Magnolia Science Academy 3  
1254 East Helmick St.  
Carson, CA, 90746

RE: Proposition 39 Over-Allocated Space in 2016-17 School Year

Dear Charter School Operator,

The Los Angeles Unified School District (“District”) has determined that Magnolia Science Academy 3 (“Charter School”) was over-allocated Proposition 39 space in the 2016-17 school year (“Applicable School Year”). This letter shall serve as written notice of Charter School’s reimbursement obligation to the District for over-allocated space in the Applicable School Year. This letter also explains how the reimbursement amount of **\$159,717.60** was calculated pursuant to the formula set forth by state law, and provides instructions for Charter School’s payment to the District.

**Definition of Over-Allocated Space**

State law controls Charter School’s mandatory reimbursement obligations to the District for over-allocated Proposition 39 space. Pursuant to Education Code section 47614, subdivision (b)(2), if Charter School generated less in-district classroom average daily attendance (“ADA”) than it projected for the Applicable School Year, Charter School “shall reimburse the district for the over-allocated space at rates to be set by the State Board of Education.”

The State Board of Education adopted California Code of Regulations, title 5, section 11969.8, subdivision (a), which declares that space is considered to be over-allocated if:

- (1) Charter School’s actual in-district classroom ADA is less than the projected in-district classroom ADA upon which the facility allocation was based, and
- (2) The difference is greater than or equal to a threshold ADA amount of 25 ADA or 10 percent of projected in-district classroom ADA, whichever is greater.

As shown below, Charter School’s actual in-district classroom ADA was less than its projected in-district classroom ADA upon which the facility allocation was based for the Applicable School Year. In addition, the difference was greater than or equal to the greater of 25 ADA or 10 percent of projected in-district classroom ADA.



Projected In-District Classroom ADA <sup>1</sup>	Actual In-District Classroom ADA <sup>2</sup>	Difference	Is the Difference greater than or equal to 25 ADA, or 10 percent of projected in-district classroom ADA, whichever is greater?
415.68	315.67	100.01	YES

Based on the foregoing, Charter School was over-allocated space in the Applicable School Year.

**Reimbursement Amount Owed by Charter School to the District**

Pursuant to section 11969.8, subdivision (a), the mandatory reimbursement amount owed by Charter School to the District due to over allocated space for the Applicable School Year was calculated using a per-pupil rate posted on the California Department of Education (“CDE”) website.<sup>3</sup> The per-pupil rate for over-allocated space for the Applicable School Year is \$2,016. (See <https://www.cde.ca.gov/sp/ch/overallocated.asp>.)

Section 11969.8, subdivision (a), states that the reimbursement amount owed by Charter School for over-allocated space shall be equal to (1) the per-pupil rate times the difference between Charter School’s actual in-district classroom ADA and the projected in-district classroom ADA upon which the facility allocation was based, less (2) this rate times one-half the threshold ADA. The “threshold ADA” is defined by section 11969.8, subdivision (a), as 25 ADA or 10 percent of projected in-district classroom ADA, whichever is greater. Based on this regulatory formula, the following describes the reimbursement amount owed by Charter School to the District for the Applicable School Year:

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<sup>1</sup> If Charter School and the District did not enter into a Proposition 39 alternative agreement for the Applicable School Year, Charter School’s projected in-district classroom ADA was calculated by applying the projection identified in the District’s final notification of space offered. If Charter School and the District entered into a Proposition 39 alternative agreement for the Applicable School Year, Charter School’s projected in-district classroom ADA was calculated by multiplying the ratio of ADA-to-teaching stations (classrooms) provided to students attending Charter School’s comparison group schools with the number of exclusive use teaching stations (classrooms) allocated to Charter School.

<sup>2</sup> In compliance with California Code of Regulations, title 5, section 11969.8, subdivision (a), “actual in-district classroom ADA” was determined using the report submitted by Charter School pursuant to section 11969.9(l) in conjunction with the second principal apportionment under Education Code section 41601.

<sup>3</sup> “The per-pupil rate for over-allocated space shall be equal to the statewide average cost avoided per pupil set pursuant to Education Code section 42263 for 2005-06, adjusted annually thereafter by the CDE by the annual percentage change in the general-purpose entitlement to charter schools calculated pursuant to Education Code section 47633, rounded to the next highest dollar, and posted on the CDE Web site.” California Code of Regulations, title 5, section 11969.8, subdivision (a).

<b>(1) Per-Pupil Rate times the difference between Charter School's actual in-district classroom ADA and the projected in-district classroom ADA upon which the facility allocation was based</b>	less	<b>(2) Per-Pupil Rate times one-half the threshold ADA</b>	equals	<b>Reimbursement Amount Owed by Charter School to the District</b>
$\$2,016 \times 100.01 = \$201,620.16$	-	$\$2,016 \times (\frac{1}{2} \text{ of } 41.57) = \$41,902.56$	=	$\$159,717.60$

Therefore, Charter School owes the District a reimbursement amount of \$159,717.60 ("Reimbursement") due to over-allocated space for the Applicable School Year.

Charter School was reminded of its legal obligations to reimburse the District if it was over-allocated space both in the preliminary proposal and the final notification of space offered, if any, that were issued by the District for the Applicable School Year. If Charter School and the District entered into a Proposition 39 alternative agreement for the Applicable School Year, Charter School also affirmed therein that it remains subject to potential reimbursement obligations for over-allocated space pursuant to California Code of Regulations, title 5, section 11969.8.

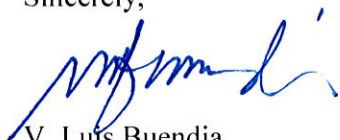
Please remit the Reimbursement within 20 days of delivery of this letter via check payable to "The Los Angeles Unified School District" and delivered to:

Los Angeles Unified School District  
 LAUSD Permit Office  
 333 S Beaudry Ave, 1st Floor  
 Los Angeles, CA 90017  
 ATTN: Over-Allocated Space Payment

Please be sure to include Charter School's name and "Prop. 39 over-allocated space for 2016-17" in the memo section of the check.

If you have any questions or wish to discuss this matter further, please e-mail [prop39@lausd.net](mailto:prop39@lausd.net).

Sincerely,



V. Luis Buendia  
 Interim Chief Financial Officer

Cc: Austin Beutner, Superintendent





## **Exhibit B-2**

# **MSA-3 2017-18 OVER-ALLOCATION LETTER**

**MEMBERS OF THE BOARD**

**DR. RICHARD A. VLADOVIC, PRESIDENT**  
**MÓNICA GARCÍA**  
**JACKIE GOLDBERG**  
**KELLY GONEZ**  
**DR. GEORGE J. MCKENNA III**  
**NICK MELVOIN**  
**SCOTT M. SCHMERELSON**



**LOS ANGELES UNIFIED SCHOOL DISTRICT**

**AUSTIN BEUTNER**  
Superintendent

**MEGAN K. REILLY**  
Deputy Superintendent

**V. LUIS BUENDIA**  
Interim Chief Financial Officer

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[E-mail \(sdaniel@magnoliapublicschools.org\)](mailto:sdaniel@magnoliapublicschools.org)

September 20, 2019

Shandrea Daniel, Principal  
Magnolia Science Academy 3  
1254 East Helmick St.  
Carson, CA, 90746

RE: Proposition 39 Over-Allocated Space in 2017-18 School Year

Dear Charter School Operator,

The Los Angeles Unified School District (“District”) has determined that Magnolia Science Academy 3 (“Charter School”) was over-allocated Proposition 39 space in the 2017-18 school year (“Applicable School Year”). This letter shall serve as written notice of Charter School’s reimbursement obligation to the District for over-allocated space in the Applicable School Year. This letter also explains how the reimbursement amount of **\$84,788.90** was calculated pursuant to the formula set forth by state law, and provides instructions for Charter School’s payment to the District.

**Definition of Over-Allocated Space**

State law controls Charter School’s mandatory reimbursement obligations to the District for over-allocated Proposition 39 space. Pursuant to Education Code section 47614, subdivision (b)(2), if Charter School generated less in-district classroom average daily attendance (“ADA”) than it projected for the Applicable School Year, Charter School “shall reimburse the district for the over-allocated space at rates to be set by the State Board of Education.”

The State Board of Education adopted California Code of Regulations, title 5, section 11969.8, subdivision (a), which declares that space is considered to be over-allocated if:

- (1) Charter School’s actual in-district classroom ADA is less than the projected in-district classroom ADA upon which the facility allocation was based, and
- (2) The difference is greater than or equal to a threshold ADA amount of 25 ADA or 10 percent of projected in-district classroom ADA, whichever is greater.

As shown below, Charter School’s actual in-district classroom ADA was less than its projected in-district classroom ADA upon which the facility allocation was based for the Applicable School Year. In addition, the difference was greater than or equal to the greater of 25 ADA or 10 percent of projected in-district classroom ADA.

<b>Projected In-District Classroom ADA<sup>1</sup></b>	<b>Actual In-District Classroom ADA<sup>2</sup></b>	<b>Difference</b>	<b>Is the Difference greater than or equal to 25 ADA, or 10 percent of projected in-district classroom ADA, whichever is greater?</b>
348.23	289.76	58.47	YES

Based on the foregoing, Charter School was over-allocated space in the Applicable School Year.

**Reimbursement Amount Owed by Charter School to the District**

Pursuant to section 11969.8, subdivision (a), the mandatory reimbursement amount owed by Charter School to the District due to over allocated space for the Applicable School Year was calculated using a per-pupil rate posted on the California Department of Education (“CDE”) website.<sup>3</sup> The per-pupil rate for over-allocated space for the Applicable School Year is \$2,065. (See <https://www.cde.ca.gov/sp/ch/overalllocated.asp>.)

Section 11969.8, subdivision (a), states that the reimbursement amount owed by Charter School for over-allocated space shall be equal to (1) the per-pupil rate times the difference between Charter School’s actual in-district classroom ADA and the projected in-district classroom ADA upon which the facility allocation was based, less (2) this rate times one-half the threshold ADA. The “threshold ADA” is defined by section 11969.8, subdivision (a), as 25 ADA or 10 percent of projected in-district classroom ADA, whichever is greater. Based on this regulatory formula, the following describes the reimbursement amount owed by Charter School to the District for the Applicable School Year:

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<sup>1</sup> If Charter School and the District did not enter into a Proposition 39 alternative agreement for the Applicable School Year, Charter School’s projected in-district classroom ADA was calculated by applying the projection identified in the District’s final notification of space offered. If Charter School and the District entered into a Proposition 39 alternative agreement for the Applicable School Year, Charter School’s projected in-district classroom ADA was calculated by applying the projection identified in the alternative agreement.

<sup>2</sup> In compliance with California Code of Regulations, title 5, section 11969.8, subdivision (a), “actual in-district classroom ADA” was determined using the report submitted by Charter School pursuant to section 11969.9(l) in conjunction with the second principal apportionment under Education Code section 41601.

<sup>3</sup> “The per-pupil rate for over-allocated space shall be equal to the statewide average cost avoided per pupil set pursuant to Education Code section 42263 for 2005-06, adjusted annually thereafter by the CDE by the annual percentage change in the general-purpose entitlement to charter schools calculated pursuant to Education Code section 47633, rounded to the next highest dollar, and posted on the CDE Web site.” California Code of Regulations, title 5, section 11969.8, subdivision (a).



<b>(1) Per-Pupil Rate times the difference between Charter School's actual in-district classroom ADA and the projected in-district classroom ADA upon which the facility allocation was based</b>	less	<b>(2) Per-Pupil Rate times one-half the threshold ADA</b>	equals	<b>Reimbursement Amount Owed by Charter School to the District</b>
$\$2,065 \times 58.47 = \$120,740.55$	-	$\$2,065 \times (\frac{1}{2} \text{ of } 34.82) = \$35,951.65$	=	$\$84,788.90$

Therefore, Charter School owes the District a reimbursement amount of \$84,788.90 ("Reimbursement") due to over-allocated space for the Applicable School Year.

Charter School was reminded of its legal obligations to reimburse the District if it was over-allocated space both in the preliminary proposal and the final notification of space offered, if any, that were issued by the District for the Applicable School Year. If Charter School and the District entered into a Proposition 39 alternative agreement for the Applicable School Year, Charter School also affirmed therein that it remains subject to potential reimbursement obligations for over-allocated space pursuant to California Code of Regulations, title 5, section 11969.8.

Please remit the Reimbursement within 20 days of delivery of this letter via check payable to "The Los Angeles Unified School District" and delivered to:

Los Angeles Unified School District  
 LAUSD Permit Office  
 333 S Beaudry Ave, 1st Floor  
 Los Angeles, CA 90017  
 ATTN: Over-Allocated Space Payment

Please be sure to include Charter School's name and "Prop. 39 over-allocated space for 2017-18" in the memo section of the check.

If you have any questions or wish to discuss this matter further, please e-mail [prop39@lausd.net](mailto:prop39@lausd.net).

Sincerely,



V. Luis Buendia  
 Interim Chief Financial Officer

Cc: Austin Beutner, Superintendent





## **Exhibit C**

### **MSA-4 2016-17 OVER-ALLOCATION LETTER**

**MEMBERS OF THE BOARD**

DR. RICHARD A. VLADOVIC, PRESIDENT  
MÓNICA GARCÍA  
JACKIE GOLDBERG  
KELLY GONEZ  
DR. GEORGE J. MCKENNA III  
NICK MELVOIN  
SCOTT M. SCHMERELSON



**LOS ANGELES UNIFIED SCHOOL DISTRICT**

AUSTIN BEUTNER  
Superintendent

MEGAN K. REILLY  
Deputy Superintendent

V. LUIS BUENDIA  
Interim Chief Financial Officer

---

E-mail ([arubalcava@magnoliapublicschools.org](mailto:arubalcava@magnoliapublicschools.org))

September 20, 2019

Alfredo Rubalcava  
Magnolia Science Academy 4  
11330 W. Graham Place B-9  
Los Angeles, CA, 90064

RE: Proposition 39 Over-Allocated Space in 2016-17 School Year

Dear Charter School Operator,

The Los Angeles Unified School District (“District”) has determined that Magnolia Science Academy 4 (“Charter School”) was over-allocated Proposition 39 space in the 2016-17 school year (“Applicable School Year”). This letter shall serve as written notice of Charter School’s reimbursement obligation to the District for over-allocated space in the Applicable School Year. This letter also explains how the reimbursement amount of **\$219,663.36** was calculated pursuant to the formula set forth by state law, and provides instructions for Charter School’s payment to the District.

**Definition of Over-Allocated Space**

State law controls Charter School’s mandatory reimbursement obligations to the District for over-allocated Proposition 39 space. Pursuant to Education Code section 47614, subdivision (b)(2), if Charter School generated less in-district classroom average daily attendance (“ADA”) than it projected for the Applicable School Year, Charter School “shall reimburse the district for the over-allocated space at rates to be set by the State Board of Education.”

The State Board of Education adopted California Code of Regulations, title 5, section 11969.8, subdivision (a), which declares that space is considered to be over-allocated if:

- (1) Charter School’s actual in-district classroom ADA is less than the projected in-district classroom ADA upon which the facility allocation was based, and
- (2) The difference is greater than or equal to a threshold ADA amount of 25 ADA or 10 percent of projected in-district classroom ADA, whichever is greater.

As shown below, Charter School’s actual in-district classroom ADA was less than its projected in-district classroom ADA upon which the facility allocation was based for the Applicable School Year. In addition, the difference was greater than or equal to the greater of 25 ADA or 10 percent of projected in-district classroom ADA.

<b>Projected In-District Classroom ADA<sup>1</sup></b>	<b>Actual In-District Classroom ADA<sup>2</sup></b>	<b>Difference</b>	<b>Is the Difference greater than or equal to 25 ADA, or 10 percent of projected in-district classroom ADA, whichever is greater?</b>
287.98	164.62	123.36	YES

Based on the foregoing, Charter School was over-allocated space in the Applicable School Year.

**Reimbursement Amount Owed by Charter School to the District**

Pursuant to section 11969.8, subdivision (a), the mandatory reimbursement amount owed by Charter School to the District due to over allocated space for the Applicable School Year was calculated using a per-pupil rate posted on the California Department of Education (“CDE”) website.<sup>3</sup> The per-pupil rate for over-allocated space for the Applicable School Year is \$2,016. (See <https://www.cde.ca.gov/sp/ch/overallocated.asp>.)

Section 11969.8, subdivision (a), states that the reimbursement amount owed by Charter School for over-allocated space shall be equal to (1) the per-pupil rate times the difference between Charter School’s actual in-district classroom ADA and the projected in-district classroom ADA upon which the facility allocation was based, less (2) this rate times one-half the threshold ADA. The “threshold ADA” is defined by section 11969.8, subdivision (a), as 25 ADA or 10 percent of projected in-district classroom ADA, whichever is greater. Based on this regulatory formula, the following describes the reimbursement amount owed by Charter School to the District for the Applicable School Year:

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<sup>1</sup> If Charter School and the District did not enter into a Proposition 39 alternative agreement for the Applicable School Year, Charter School’s projected in-district classroom ADA was calculated by applying the projection identified in the District’s final notification of space offered. If Charter School and the District entered into a Proposition 39 alternative agreement for the Applicable School Year, Charter School’s projected in-district classroom ADA was calculated by multiplying the ratio of ADA-to-teaching stations (classrooms) provided to students attending Charter School’s comparison group schools with the number of exclusive use teaching stations (classrooms) allocated to Charter School.

<sup>2</sup> In compliance with California Code of Regulations, title 5, section 11969.8, subdivision (a), “actual in-district classroom ADA” was determined using the report submitted by Charter School pursuant to section 11969.9(l) in conjunction with the second principal apportionment under Education Code section 41601.

<sup>3</sup> “The per-pupil rate for over-allocated space shall be equal to the statewide average cost avoided per pupil set pursuant to Education Code section 42263 for 2005-06, adjusted annually thereafter by the CDE by the annual percentage change in the general-purpose entitlement to charter schools calculated pursuant to Education Code section 47633, rounded to the next highest dollar, and posted on the CDE Web site.” California Code of Regulations, title 5, section 11969.8, subdivision (a).



<b>(1) Per-Pupil Rate times the difference between Charter School's actual in-district classroom ADA and the projected in-district classroom ADA upon which the facility allocation was based</b>	less	<b>(2) Per-Pupil Rate times one-half the threshold ADA</b>	equals	<b>Reimbursement Amount Owed by Charter School to the District</b>
$\$2,016 \times 123.36 = \$248,693.76$	-	$\$2,016 \times (\frac{1}{2} \text{ of } 28.80) = \$29,030.40$	=	$\$219,663.36$

Therefore, Charter School owes the District a reimbursement amount of \$219,663.36 ("Reimbursement") due to over-allocated space for the Applicable School Year.

Charter School was reminded of its legal obligations to reimburse the District if it was over-allocated space both in the preliminary proposal and the final notification of space offered, if any, that were issued by the District for the Applicable School Year. If Charter School and the District entered into a Proposition 39 alternative agreement for the Applicable School Year, Charter School also affirmed therein that it remains subject to potential reimbursement obligations for over-allocated space pursuant to California Code of Regulations, title 5, section 11969.8.


Please remit the Reimbursement within 20 days of delivery of this letter via check payable to "The Los Angeles Unified School District" and delivered to:

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 Los Angeles, CA 90017  
 ATTN: Over-Allocated Space Payment

Please be sure to include Charter School's name and "Prop. 39 over-allocated space for 2016-17" in the memo section of the check.

If you have any questions or wish to discuss this matter further, please e-mail [prop39@lausd.net](mailto:prop39@lausd.net).

Sincerely,



V. Luis Buendia  
 Interim Chief Financial Officer

Cc: Austin Beutner, Superintendent





## **Exhibit D-1**

# **MSA-5 2016-17 OVER-ALLOCATION LETTER**

**MEMBERS OF THE BOARD**

**DR. RICHARD A. VLADOVIC, PRESIDENT**  
**MÓNICA GARCÍA**  
**JACKIE GOLDBERG**  
**KELLY GONEZ**  
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**LOS ANGELES UNIFIED SCHOOL DISTRICT**

**AUSTIN BEUTNER**  
Superintendent

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Deputy Superintendent

**V. LUIS BUENDIA**  
Interim Chief Financial Officer

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E-mail ([arubalcava@magnoliapublicschools.org](mailto:arubalcava@magnoliapublicschools.org))

September 20, 2019

Alfredo Rubalcava  
Magnolia Science Academy 5  
18230 Kittridge St.  
Reseda, CA, 91335

RE: Proposition 39 Over-Allocated Space in 2016-17 School Year

Dear Charter School Operator,

The Los Angeles Unified School District (“District”) has determined that Magnolia Science Academy 5 (“Charter School”) was over-allocated Proposition 39 space in the 2016-17 school year (“Applicable School Year”). This letter shall serve as written notice of Charter School’s reimbursement obligation to the District for over-allocated space in the Applicable School Year. This letter also explains how the reimbursement amount of **\$26,651.52** was calculated pursuant to the formula set forth by state law, and provides instructions for Charter School’s payment to the District.

**Definition of Over-Allocated Space**

State law controls Charter School’s mandatory reimbursement obligations to the District for over-allocated Proposition 39 space. Pursuant to Education Code section 47614, subdivision (b)(2), if Charter School generated less in-district classroom average daily attendance (“ADA”) than it projected for the Applicable School Year, Charter School “shall reimburse the district for the over-allocated space at rates to be set by the State Board of Education.”

The State Board of Education adopted California Code of Regulations, title 5, section 11969.8, subdivision (a), which declares that space is considered to be over-allocated if:

- (1) Charter School’s actual in-district classroom ADA is less than the projected in-district classroom ADA upon which the facility allocation was based, and
- (2) The difference is greater than or equal to a threshold ADA amount of 25 ADA or 10 percent of projected in-district classroom ADA, whichever is greater.

As shown below, Charter School’s actual in-district classroom ADA was less than its projected in-district classroom ADA upon which the facility allocation was based for the Applicable School Year. In addition, the difference was greater than or equal to the greater of 25 ADA or 10 percent of projected in-district classroom ADA.

<b>Projected In-District Classroom ADA<sup>1</sup></b>	<b>Actual In-District Classroom ADA<sup>2</sup></b>	<b>Difference</b>	<b>Is the Difference greater than or equal to 25 ADA, or 10 percent of projected in-district classroom ADA, whichever is greater?</b>
200.64	174.92	25.72	YES

Based on the foregoing, Charter School was over-allocated space in the Applicable School Year.

**Reimbursement Amount Owed by Charter School to the District**

Pursuant to section 11969.8, subdivision (a), the mandatory reimbursement amount owed by Charter School to the District due to over allocated space for the Applicable School Year was calculated using a per-pupil rate posted on the California Department of Education (“CDE”) website.<sup>3</sup> The per-pupil rate for over-allocated space for the Applicable School Year is \$2,016. (See <https://www.cde.ca.gov/sp/ch/overalllocated.asp>.)

Section 11969.8, subdivision (a), states that the reimbursement amount owed by Charter School for over-allocated space shall be equal to (1) the per-pupil rate times the difference between Charter School’s actual in-district classroom ADA and the projected in-district classroom ADA upon which the facility allocation was based, less (2) this rate times one-half the threshold ADA. The “threshold ADA” is defined by section 11969.8, subdivision (a), as 25 ADA or 10 percent of projected in-district classroom ADA, whichever is greater. Based on this regulatory formula, the following describes the reimbursement amount owed by Charter School to the District for the Applicable School Year:

---

<sup>1</sup> If Charter School and the District did not enter into a Proposition 39 alternative agreement for the Applicable School Year, Charter School’s projected in-district classroom ADA was calculated by applying the projection identified in the District’s final notification of space offered. If Charter School and the District entered into a Proposition 39 alternative agreement for the Applicable School Year, Charter School’s projected in-district classroom ADA was calculated by multiplying the ratio of ADA-to-teaching stations (classrooms) provided to students attending Charter School’s comparison group schools with the number of exclusive use teaching stations (classrooms) allocated to Charter School.

<sup>2</sup> In compliance with California Code of Regulations, title 5, section 11969.8, subdivision (a), “actual in-district classroom ADA” was determined using the report submitted by Charter School pursuant to section 11969.9(l) in conjunction with the second principal apportionment under Education Code section 41601.

<sup>3</sup> “The per-pupil rate for over-allocated space shall be equal to the statewide average cost avoided per pupil set pursuant to Education Code section 42263 for 2005-06, adjusted annually thereafter by the CDE by the annual percentage change in the general-purpose entitlement to charter schools calculated pursuant to Education Code section 47633, rounded to the next highest dollar, and posted on the CDE Web site.” California Code of Regulations, title 5, section 11969.8, subdivision (a).



<b>(1) Per-Pupil Rate times the difference between Charter School's actual in-district classroom ADA and the projected in-district classroom ADA upon which the facility allocation was based</b>	less	<b>(2) Per-Pupil Rate times one-half the threshold ADA</b>	equals	<b>Reimbursement Amount Owed by Charter School to the District</b>
$\$2,016 \times 25.72 = \$51,851.52$	-	$\$2,016 \times (\frac{1}{2} \text{ of } 25.00) = \$25,200.00$	=	$\$26,651.52$

Therefore, Charter School owes the District a reimbursement amount of \$26,651.52 ("Reimbursement") due to over-allocated space for the Applicable School Year.

Charter School was reminded of its legal obligations to reimburse the District if it was over-allocated space both in the preliminary proposal and the final notification of space offered, if any, that were issued by the District for the Applicable School Year. If Charter School and the District entered into a Proposition 39 alternative agreement for the Applicable School Year, Charter School also affirmed therein that it remains subject to potential reimbursement obligations for over-allocated space pursuant to California Code of Regulations, title 5, section 11969.8.

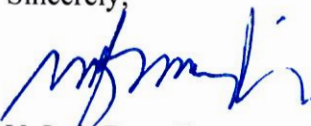
Please remit the Reimbursement within 20 days of delivery of this letter via check payable to "The Los Angeles Unified School District" and delivered to:

Los Angeles Unified School District  
 LAUSD Permit Office  
 333 S Beaudry Ave, 1st Floor  
 Los Angeles, CA 90017  
 ATTN: Over-Allocated Space Payment

Please be sure to include Charter School's name and "Prop. 39 over-allocated space for 2016-17" in the memo section of the check.

If you have any questions or wish to discuss this matter further, please e-mail [prop39@lausd.net](mailto:prop39@lausd.net).

Sincerely,



V. Luis Buendia  
 Interim Chief Financial Officer

Cc: Austin Beutner, Superintendent





## **Exhibit D-2**

# **MSA-5 2018-19 OVER-ALLOCATION LETTER**

**MEMBERS OF THE BOARD**

**DR. RICHARD A. VLADOVIC, PRESIDENT**  
**MÓNICA GARCÍA**  
**JACKIE GOLDBERG**  
**KELLY GONEZ**  
**DR. GEORGE J. MCKENNA III**  
**NICK MELVOIN**  
**SCOTT M. SCHMERELSON**



**LOS ANGELES UNIFIED SCHOOL DISTRICT**

**AUSTIN BEUTNER**  
Superintendent

**MEGAN K. REILLY**  
Deputy Superintendent

**V. LUIS BUENDIA**  
Interim Chief Financial Officer

---

E-mail ([arubalcava@magnoliapublicschools.org](mailto:arubalcava@magnoliapublicschools.org))

September 20, 2019

Alfredo Rubalcava  
Magnolia Science Academy 5  
18230 Kittridge St.  
Reseda, CA, 91335

RE: Proposition 39 Over-Allocated Space in 2018-19 School Year

Dear Charter School Operator,

The Los Angeles Unified School District (“District”) has determined that Magnolia Science Academy 5 (“Charter School”) was over-allocated Proposition 39 space in the 2018-19 school year (“Applicable School Year”). This letter shall serve as written notice of Charter School’s reimbursement obligation to the District for over-allocated space in the Applicable School Year. This letter also explains how the reimbursement amount of **\$37,111.63** was calculated pursuant to the formula set forth by state law, and provides instructions for Charter School’s payment to the District.

**Definition of Over-Allocated Space**

State law controls Charter School’s mandatory reimbursement obligations to the District for over-allocated Proposition 39 space. Pursuant to Education Code section 47614, subdivision (b)(2), if Charter School generated less in-district classroom average daily attendance (“ADA”) than it projected for the Applicable School Year, Charter School “shall reimburse the district for the over-allocated space at rates to be set by the State Board of Education.”

The State Board of Education adopted California Code of Regulations, title 5, section 11969.8, subdivision (a), which declares that space is considered to be over-allocated if:

- (1) Charter School’s actual in-district classroom ADA is less than the projected in-district classroom ADA upon which the facility allocation was based, and
- (2) The difference is greater than or equal to a threshold ADA amount of 25 ADA or 10 percent of projected in-district classroom ADA, whichever is greater.

As shown below, Charter School’s actual in-district classroom ADA was less than its projected in-district classroom ADA upon which the facility allocation was based for the Applicable School Year. In addition, the difference was greater than or equal to the greater of 25 ADA or 10 percent of projected in-district classroom ADA.

Projected In-District Classroom ADA <sup>1</sup>	Actual In-District Classroom ADA <sup>2</sup>	Difference	Is the Difference greater than or equal to 25 ADA, or 10 percent of projected in-district classroom ADA, whichever is greater?
264.10	234.11	29.99	YES

Based on the foregoing, Charter School was over-allocated space in the Applicable School Year.

**Reimbursement Amount Owed by Charter School to the District**

Pursuant to section 11969.8, subdivision (a), the mandatory reimbursement amount owed by Charter School to the District due to over allocated space for the Applicable School Year was calculated using a per-pupil rate posted on the California Department of Education (“CDE”) website.<sup>3</sup> The per-pupil rate for over-allocated space for the Applicable School Year is \$2,211. (See <https://www.cde.ca.gov/sp/ch/overallocated.asp>.)

Section 11969.8, subdivision (a), states that the reimbursement amount owed by Charter School for over-allocated space shall be equal to (1) the per-pupil rate times the difference between Charter School’s actual in-district classroom ADA and the projected in-district classroom ADA upon which the facility allocation was based, less (2) this rate times one-half the threshold ADA. The “threshold ADA” is defined by section 11969.8, subdivision (a), as 25 ADA or 10 percent of projected in-district classroom ADA, whichever is greater. Based on this regulatory formula, the following describes the reimbursement amount owed by Charter School to the District for the Applicable School Year:

---

<sup>1</sup> If Charter School and the District did not enter into a Proposition 39 alternative agreement for the Applicable School Year, Charter School’s projected in-district classroom ADA was calculated by applying the projection identified in the District’s final notification of space offered. If Charter School and the District entered into a Proposition 39 alternative agreement for the Applicable School Year, Charter School’s projected in-district classroom ADA was calculated by applying the projection identified in the alternative agreement.

<sup>2</sup> In compliance with California Code of Regulations, title 5, section 11969.8, subdivision (a), “actual in-district classroom ADA” was determined using the report submitted by Charter School pursuant to section 11969.9(1) in conjunction with the second principal apportionment under Education Code section 41601.

<sup>3</sup> “The per-pupil rate for over-allocated space shall be equal to the statewide average cost avoided per pupil set pursuant to Education Code section 42263 for 2005-06, adjusted annually thereafter by the CDE by the annual percentage change in the general-purpose entitlement to charter schools calculated pursuant to Education Code section 47633, rounded to the next highest dollar, and posted on the CDE Web site.” California Code of Regulations, title 5, section 11969.8, subdivision (a).



<b>(1) Per-Pupil Rate times the difference between Charter School's actual in-district classroom ADA and the projected in-district classroom ADA upon which the facility allocation was based</b>	less	<b>(2) Per-Pupil Rate times one-half the threshold ADA</b>	equals	<b>Reimbursement Amount Owed by Charter School to the District</b>
$\$2,211 \times 29.99 = \$66,307.89$	-	$\$2,211 \times (\frac{1}{2} \text{ of } 26.41) = \$29,196.26$	=	$\$37,111.63$

Therefore, Charter School owes the District a reimbursement amount of \$37,111.63 ("Reimbursement") due to over-allocated space for the Applicable School Year.

Charter School was reminded of its legal obligations to reimburse the District if it was over-allocated space both in the preliminary proposal and the final notification of space offered, if any, that were issued by the District for the Applicable School Year. If Charter School and the District entered into a Proposition 39 alternative agreement for the Applicable School Year, Charter School also affirmed therein that it remains subject to potential reimbursement obligations for over-allocated space pursuant to California Code of Regulations, title 5, section 11969.8.

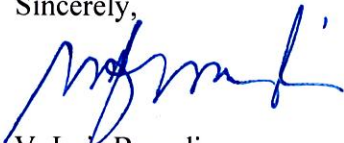
Please remit the Reimbursement within 20 days of delivery of this letter via check payable to "The Los Angeles Unified School District" and delivered to:

Los Angeles Unified School District  
 LAUSD Permit Office  
 333 S Beaudry Ave, 1st Floor  
 Los Angeles, CA 90017  
 ATTN: Over-Allocated Space Payment

Please be sure to include Charter School's name and "Prop. 39 over-allocated space for 2018-19" in the memo section of the check.

If you have any questions or wish to discuss this matter further, please e-mail [prop39@lausd.net](mailto:prop39@lausd.net).

Sincerely,



V. Luis Buendia  
 Interim Chief Financial Officer

Cc: Austin Beutner, Superintendent





## **Exhibit E**

# **CALIFORNIA CODE OF REGULATIONS, TITLE 5, ARTICLE 3 – FACILITIES FOR CHARTER SCHOOLS**



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TITLE 5. EDUCATION  
DIVISION 1. CALIFORNIA DEPARTMENT OF EDUCATION  
CHAPTER 11. SPECIAL PROGRAMS  
SUBCHAPTER 19. CHARTER SCHOOLS  
ARTICLE 3. FACILITIES FOR CHARTER SCHOOLS

5 CCR 11969.1 (2011)

§ 11969.1. Purpose and Stipulation

(a) This article governs provision of facilities by school districts to charter schools under *Education Code section 47614*.

(b) If a charter school and a school district mutually agree to an alternative to specific compliance with any of the provisions of this article, nothing in this article shall prohibit implementation of that alternative, including, for example, funding in lieu of facilities in an amount commensurate with local rental or lease costs for facilities reasonably equivalent to facilities of the district.

AUTHORITY:

Note: Authority cited: *Sections 33031 and 47614(b), Education Code*. Reference: *Section 47614, Education Code*.

HISTORY:

1. New article 3 (sections 11969.1-11969.9) and section filed 7-30-2002; operative 8-29-2002 (Register 2002, No. 31).
2. Amendment of section heading, section and Note filed 2-28-2008; operative 3-29-2008 (Register 2008, No. 9).



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SUBCHAPTER 19. CHARTER SCHOOLS  
ARTICLE 3. FACILITIES FOR CHARTER SCHOOLS

5 CCR 11969.2 (2011)

§ 11969.2. Definitions

(a) Average Daily Classroom Attendance. As used in *Education Code section 47614(b)*, "average daily classroom attendance," or "classroom ADA," is average daily attendance (ADA) for classroom-based apportionments as used in *Education Code section 47612.5*. "In-district classroom ADA" is classroom ADA attributable to in-district students. Nothing in this article shall prohibit a school district from allowing a charter school to include nonclassroom-based ADA in average daily classroom attendance, but only:

(1) to the extent of the instructional time that the students generating the nonclassroom-based ADA are actually in the classroom under the direct supervision and control of an employee of the charter school; and

(2) if the school district and charter school agree upon the time(s) that facilities devoted to students generating non-classroom-based ADA will be used.

(b) Operating in the School District. As used in *Education Code section 47614(b)*, a charter school is "operating in the school district" if the charter school meets the requirements of *Education Code section 47614(b)(5)* regardless of whether the school district is or is proposed to be the authorizing entity for the charter school and whether the charter school has a facility inside the school district's boundaries.

(c) In-district Students. As used in *Education Code section 47614(b)*, a student attending a charter school is an "in-district student" of a school district if he or she is entitled to attend the schools of the school district and could attend a school district-operated school, except that a student eligible to attend the schools of the school district based on inter-district attendance pursuant to *Education Code section 46600-46611* or based on parental employment pursuant to *Education Code section 48204(b)* shall be considered a student of the school district where he or she resides.

(d) Contiguous. As used in *Education Code section 47614(b)*, facilities are "contiguous" if they are contained on the school site or immediately adjacent to the school site. If the in-district average daily classroom attendance of the charter school cannot be accommodated on any single school district school site, contiguous facilities also includes facilities located at more than one site, provided that the school district shall minimize the number of sites assigned and shall consider student safety. In evaluating and accommodating a charter school's request for facilities pursuant to *Education Code section 47614*, the charter school's in-district students must be given the same consideration as students in the district-run schools, subject to the requirement that the facilities provided to the charter school must be contiguous. If a school district's preliminary proposal or final notification presented pursuant to subdivisions (f) or (h) of section 11969.9 does not accommodate a charter school at a single school site, the district's governing board must first make a finding that the charter school could not be accommodated at a single site and adopt a written statement of reasons explaining the finding.



## 5 CCR 11969.2

(e) **Furnished and Equipped.** As used in *Education Code section 47614(b)*, a facility is "furnished and equipped" if it includes reasonably equivalent furnishings necessary to conduct classroom instruction and to provide for student services that directly support classroom instruction as found in the comparison group schools established under section 11969.3(a), and if it has equipment that is reasonably equivalent to that in the comparison group schools. "Equipment" means property that does not lose its identity when removed from its location and is not changed materially or consumed immediately (e.g., within one year) by use. Equipment has relatively permanent value, and its purchase increases the total value of a Local Educational Agency's (LEA's) physical properties. Examples include furniture, vehicles, machinery, motion picture film, videotape, furnishings that are not an integral part of the building or building system, and certain intangible assets, such as major software programs. Furnishings and equipment acquired for a school site with non-district resources are excluded when determining reasonable equivalence.

(f) **General Fund.** As used in *Education Code section 47614(b)(1)*, "general fund" means the main operating fund of the LEA. It is used to account for all activities except those that are required to be accounted for in another fund. In keeping with the minimum number of funds principle, all of an LEA's activities are reported in the general fund unless there is a compelling reason to account for an activity in another fund. An LEA may have only one general fund.

(g) **Unrestricted Revenues.** As used in *Education Code section 47614(b)(1)*, "unrestricted revenues" are those funds whose uses are not subject to specific constraints and that may be used for any purposes not prohibited by law. Restricted revenues are those funds received from external sources that are legally restricted or that are restricted by the donor to specific purposes. Programs funded by a combination of restricted and unrestricted sources will be accounted for and reported as restricted. Funds or activities that are not restricted or designated by the donor, but rather by the LEA's governing board, will be accounted for and reported as unrestricted.

(h) **Facilities Costs.** As used in *Education Code section 47614(b)(1)*, "facilities costs" are those activities concerned with keeping the physical plant open, comfortable, and safe for use and keeping the grounds, buildings, and equipment in working condition and a satisfactory state of repair. These include the activities of maintaining safety in buildings, on the grounds, and in the vicinity of schools. This includes plant maintenance and operations, facilities acquisition and construction, and facilities rents and leases.

**AUTHORITY:**

Note: Authority cited: *Sections 33031 and 47614(b), Education Code*. Reference: *Sections 46600-46611, 47612.5, 47614 and 48204, Education Code*.

**HISTORY:**

1. New section filed 7-30-2002; operative 8-29-2002 (Register 2002, No. 31).
2. Amendment of section and Note filed 2-28-2008; operative 3-29-2008 (Register 2008, No. 9).



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5 CCR 11969.3 (2011)

§ 11969.3. Conditions Reasonably Equivalent

The following provisions shall be used to determine whether facilities provided to a charter school are sufficient to accommodate charter school students in conditions reasonably equivalent to those in which the students would be accommodated if they were attending public schools of the school district providing facilities, as required by *Education Code section 47614(b)*.

(a) Comparison Group.

(1) The standard for determining whether facilities are sufficient to accommodate charter school students in conditions reasonably equivalent to those in which the students would be accommodated if they were attending public schools of the school district providing facilities shall be a comparison group of district-operated schools with similar grade levels. If none of the district-operated schools has grade levels similar to the charter school, then a contiguous facility within the meaning of subdivision (d) of section 11969.2 shall be an existing facility that is most consistent with the needs of students in the grade levels served at the charter school. The district is not obligated to pay for the modification of an existing school site to accommodate the charter school's grade level configuration.

(2) The comparison group shall be the school district-operated schools with similar grade levels that serve students living in the high school attendance area, as defined in *Education Code section 17070.15(b)*, in which the largest number of students of the charter school reside. The number of charter school students residing in a high school attendance area shall be determined using in-district classroom ADA projected for the fiscal year for which facilities are requested.

(3) For school districts whose students do not attend high school based on attendance areas, the comparison group shall be three schools in the school district with similar grade levels that the largest number of students of the charter school would otherwise attend. For school districts with fewer than three schools with similar grade levels, the comparison group shall be all schools in the school district with similar grade levels.

(4) Although the district is not obligated to pay for the modification of an existing school site to accommodate the charter school's grade level configuration, nothing in this article shall preclude the district from entering into an agreement with the charter school to modify an existing school site, with the costs of the modifications being paid exclusively by the charter school or by the school district, or paid jointly by the district and the charter school.

(b) Capacity.

(1) Facilities made available by a school district to a charter school shall be provided in the same ratio of teaching stations (classrooms) to ADA as those provided to students in the school district attending comparison group schools. School district ADA shall be determined using projections for the fiscal year and grade levels for which facilities are

requested. Charter school ADA shall be determined using in-district classroom ADA projected for the fiscal year and grade levels for which facilities are requested. The number of teaching stations (classrooms) shall be determined using the classroom inventory prepared pursuant to *California Code of Regulations, title 2, section 1859.31*, adjusted to exclude classrooms identified as interim housing. "Interim housing" means the rental or lease of classrooms used to house pupils temporarily displaced as a result of the modernization of classroom facilities, as defined in *California Code of Regulations, title 2, section 1859.2*, and classrooms used as emergency housing for schools vacated due to structural deficiencies or natural disasters.

(2) If the school district includes specialized classroom space, such as science laboratories, in its classroom inventory, the space allocation provided pursuant to paragraph (1) of subdivision (b) shall include a share of the specialized classroom space and/or a provision for access to reasonably equivalent specialized classroom space. The amount of specialized classroom space allocated and/or the access to specialized classroom space provided shall be determined based on three factors:

- (A) the grade levels of the charter school's in-district students;
- (B) the charter school's total in-district classroom ADA; and
- (C) the per-student amount of specialized classroom space in the comparison group schools.

(3) The school district shall allocate and/or provide access to non-teaching station space commensurate with the in-district classroom ADA of the charter school and the per-student amount of non-teaching station space in the comparison group schools. Non-teaching station space is all of the space that is not identified as teaching station space or specialized classroom space and includes, but is not limited to, administrative space, kitchen, multi-purpose room, and play area space. If necessary to implement this paragraph, the district shall negotiate in good faith with the charter school to establish time allocations and schedules so that educational programs of the charter school and school district are least disrupted.

(c) Condition.

(1) All of the factors listed below shall be used by the school district and charter school to determine whether the condition of facilities provided to a charter school is reasonably equivalent to the condition of comparison group schools. Condition is determined by assessing such factors as age (from latest modernization), quality of materials, and state of maintenance.

- (A) School site size.
- (B) The condition of interior and exterior surfaces.
- (C) The condition of mechanical, plumbing, electrical, and fire alarm systems, including conformity to applicable codes.
- (D) The availability and condition of technology infrastructure.
- (E) The condition of the facility as a safe learning environment including, but not limited to, the suitability of lighting, noise mitigation, and size for intended use.
- (F) The condition of the facility's furnishings and equipment.
- (G) The condition of athletic fields and/or play area space.

(2) Notwithstanding paragraph (1) of subdivision (c), at a charter school established at an existing public school site pursuant to *Education Code sections 47605(a)(2), 52055.5, 52055.55, or 52055.650*, the condition of the facility previously used by the school district at the site shall be considered to be reasonably equivalent to the condition of school district facilities for the first year the charter school uses the facility. During its first year of operation, the charter school shall be subject to charges for pro rata costs pursuant to section 11969.7, but shall not be subject to reimbursement for over-allocated space pursuant to section 11969.8.

(d) Additional Provisions Relating to a Charter School Established at an Existing Public School Site.

The following provisions apply only to a charter school established at an existing public school site pursuant to *Education Code sections 47605(a)(2), 52055.5, 52055.55, or 52055.650* and that operated at the site in its first year pursuant to paragraph (2) of subdivision (c).



## 5 CCR 11969.3

(1) The school site, as identified in the school's charter, shall be made available to the school for its second year of operation and thereafter upon annual request pursuant to *Education Code section 47614*. The district is entitled to charge the charter school pro rata costs for the school site pursuant to section 11969.7, and the district is entitled to receive reimbursement for over-allocated space from the charter school pursuant to section 11969.8, except as provided in paragraph (3).

(2)(A) If, by material revision of the charter, the location of a charter school is changed, or if one or more additional sites are approved pursuant to *Education Code section 47605(a)(4)*, then the school is entitled to request and the district shall provide for the use of facilities by the school in accordance with the revised charter, *Education Code section 47614*, and the provisions of this article.

(B) If the charter school was established pursuant to *Education Code section 47605(a)(2)*, the district shall change the school's attendance area only if a waiver is first secured from the State Board of Education (SBE) pursuant to *Education Code sections 33050-33053* of the requirement in *Education Code section 47605(d)(1)* that the school continuously give admission preference to students residing in the former attendance area of the school site.

(C) If the charter school was established pursuant to *Education Code sections 52055.5, 52055.55, or 52055.650*, the district shall relocate the school or change the school's attendance area only if a waiver is first secured from the SBE pursuant to *Education Code sections 33050-33053* of the provision of statute binding the school to the existing school site.

(D) If a school district decides to change a charter school's attendance area as provided in subparagraphs (B) or (C), and if the decision occurs between November 1 and June 30 and becomes operative in the forthcoming fiscal year, then the space allocated to the charter school is not subject to reimbursement for over-allocated space pursuant to section 11969.8 in the forthcoming fiscal year.

(3) If, by February 1 of its first year of operation, a charter school notifies the district that it will have over-allocated space in the following fiscal year, the space identified is not subject to reimbursement for over-allocated space pursuant to section 11969.8 in the following year or thereafter, and the district is entitled to occupy all or a portion of the space identified. To recover space surrendered to the district pursuant to this paragraph, a charter school must apply to the district. An application to recover surrendered space shall be evaluated by the district in accordance with the provisions of this article.

**AUTHORITY:**

Note: Authority cited: *Sections 33031 and 47614(b), Education Code*. Reference: *Sections 33050-33053, 47605, 47614, 52055.5, 52055.55 and 52055.650, Education Code*.

**HISTORY:**

1. New section filed 7-30-2002; operative 8-29-2002 (Register 2002, No. 31).
2. Amendment of section and Note filed 2-28-2008; operative 3-29-2008 (Register 2008, No. 9).



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5 CCR 11969.4 (2011)

§ 11969.4. Operations and Maintenance

(a) Facilities and furnishings and equipment provided to a charter school by a school district shall remain the property of the school district.

(b) The ongoing operations and maintenance of facilities and furnishings and equipment is the responsibility of the charter school. Projects eligible to be included in the school district deferred maintenance plan established pursuant to *Education Code section 17582* and the replacement of furnishings and equipment supplied by the school district in accordance with school district schedules and practices, shall remain the responsibility of the school district. The charter school shall comply with school district policies regarding the operations and maintenance of the school facility and furnishings and equipment, except to the extent variation is approved by the district. However, the charter school need not comply with policies in cases where actual school district practice substantially differs from official policies.

AUTHORITY:

Note: Authority cited: *Sections 33031 and 47614(b), Education Code*. Reference: *Section 47614, Education Code*.

HISTORY:

1. New section filed 7-30-2002; operative 8-29-2002 (Register 2002, No. 31).
2. Amendment of section and Note filed 2-28-2008; operative 3-29-2008 (Register 2008, No. 9).



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5 CCR 11969.5 (2011)

§ 11969.5. Availability

The space allocated for use by the charter school, subject to sharing arrangements, shall be available for the charter school's entire school year regardless of the school district's instructional year or class schedule and may not be sublet or used for purposes other than those that are consistent with school district policies and practices for use of other public schools of the school district without permission of the school district.

AUTHORITY:

Note: Authority cited: *Section 47614(b), Education Code*. Reference: *Section 47614, Education Code*.

HISTORY:

1. New section filed 7-30-2002; operative 8-29-2002 (Register 2002, No. 31).





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5 CCR 11969.6 (2011)

§ 11969.6. Location

A school district may satisfy the requirements of *Education Code section 47614* by providing facilities that are located outside the school district's boundaries, subject to other provisions of this article and subject to the restrictions on location of charter schools established in *Education Code sections 47605* and *47605.1*. No school district is required to provide facilities that are located outside the school district's boundaries to a charter school.

AUTHORITY:

Note: Authority cited: *Sections 33031 and 47614(b), Education Code*. Reference: *Sections 47605, 47605.1 and 47614, Education Code*.

HISTORY:

1. New section filed 7-30-2002; operative 8-29-2002 (Register 2002, No. 31).
2. Amendment of section and Note filed 2-28-2008; operative 3-29-2008 (Register 2008, No. 9).



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5 CCR 11969.7 (2011)

§ 11969.7. Charges for Facilities Costs

If the school district charges the charter school a pro rata share of its facilities costs for the use of the facilities, the pro rata share shall not exceed (1) a per-square-foot amount equal to those school district facilities costs that the school district pays for with unrestricted revenues from the district's general fund, as defined in sections 11969.2(f) and (g) and hereinafter referred to as "unrestricted general fund revenues," divided by the total space of the school district times (2) the amount of space allocated by the school district to the charter school. The following provisions shall apply to the calculation of the pro rata share of facilities costs:

(a) For purposes of this section, facilities costs that the school district pays with unrestricted general fund revenues includes those costs associated with plant maintenance and operations, facilities acquisition and construction, and facilities rents and leases, as defined in section 11969.2(h). For purposes of this section, facilities costs also includes:

(1) contributions from unrestricted general fund revenues to the school district's Ongoing and Major Maintenance Account (*Education Code section 17070.75*), Routine Restricted Maintenance Account (*Education Code section 17014*), and/or deferred maintenance fund,

(2) costs paid from unrestricted general fund revenues for projects eligible for funding but not funded from the deferred maintenance fund, and

(3) costs paid from unrestricted general fund revenue for replacement of facilities-related furnishings and equipment, that have not been included in paragraphs (1) and (2), according to school district schedules and practices.

For purposes of this subdivision, facilities costs do not include any costs that are paid by the charter school, including, but not limited to, costs associated with ongoing operations and maintenance and the costs of any tangible items adjusted in keeping with a customary depreciation schedule for each item.

(b) For purposes of this section, the cost of facilities shall include debt service costs.

(c) "Space allocated by the school district to the charter school" shall include a portion of shared space where a charter school shares a campus with a school district-operated program. Shared space includes, but is not limited to, those facilities needed for the overall operation of the campus, whether or not used by students. The portion of the shared space to be included in the "space allocated by the school district to the charter school" shall be calculated based on the amount of space allocated for the exclusive use of the charter school compared to the amount of space allocated to the exclusive use of the school-district-operated program.

(d) The per-square-foot charge shall be determined using actual facilities costs in the year preceding the fiscal year in which facilities are provided and the largest amount of total space of the school district at any time during the year preceding the fiscal year in which facilities are provided.

(e) The per-square-foot charge shall be applied equally by the school district to all charter schools that receive facilities under this article, and a charter school using school district facilities pursuant to *Education Code section 47614* shall report the per-square-foot charge it is paying in the current fiscal year to the California Department of Education (CDE) in any notification the charter school makes to the CDE pursuant to *Education Code section 47630.5(b)*. The CDE shall post the per-square-foot amounts reported by charter schools on its publicly accessible Web site. The CDE shall offer the opportunity to each school district to provide explanatory information regarding its per-square-foot charge and shall post any information received.

(f) If a school district charges a charter school for facilities costs pursuant to this article, and if the district is the charter school's authorizing entity, the facilities are not substantially rent free within the meaning of *Education Code section 47613*, and the district may only charge for the actual costs of supervisory oversight of the charter school not to exceed one percent of the school's revenue.

**AUTHORITY:**

Note: Authority cited: *Sections 33031 and 47614(b), Education Code*. Reference: *Sections 17014, 17070.75, 47613, 47614 and 47630.5, Education Code*.

**HISTORY:**

1. New section filed 7-30-2002; operative 8-29-2002 (Register 2002, No. 31).
2. Amendment of section and Note filed 2-28-2008; operative 3-29-2008 (Register 2008, No. 9).





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5 CCR 11969.8 (2011)

§ 11969.8. Reimbursement Rates for Over-Allocated Space

(a) Space is considered to be over-allocated if (1) the charter school's actual in-district classroom ADA is less than the projected in-district classroom ADA upon which the facility allocation was based and (2) the difference is greater than or equal to a threshold ADA amount of 25 ADA or 10 percent of projected in-district classroom ADA, whichever is greater. The per-pupil rate for over-allocated space shall be equal to the statewide average cost avoided per pupil set pursuant to *Education Code section 42263* for 2005-06, adjusted annually thereafter by the CDE by the annual percentage change in the general-purpose entitlement to charter schools calculated pursuant to *Education Code section 47633*, rounded to the next highest dollar, and posted on the CDE Web site. The reimbursement amount owed by the charter school for over-allocated space shall be equal to (1) this rate times the difference between the charter school's actual in-district classroom ADA and the projected in-district classroom ADA upon which the facility allocation was based, less (2) this rate times one-half the threshold ADA. For purposes of this subdivision, the actual in-district classroom ADA shall be determined using the report submitted pursuant to section 11969.9(l) in conjunction with the second principal apportionment under *Education Code section 41601*.

(b) A charter school must notify the school district when it anticipates that it will have over-allocated space that could be used by the school district. Upon notification by a charter school that the charter school anticipates having over-allocated space, a school district may elect to use the space for school district programs. The school district must notify the charter school whether or not it intends to use the over-allocated space within 30 days of the notification by the charter school. If the school district notifies the charter school that it intends to use all or a portion of the over-allocated space, payments for over-allocated space and pro rata share payments shall be reduced accordingly beginning at the time of the school district notification to use the space. If the school district notifies the charter school that it does not intend to use the space, the charter school must continue to make payments for over-allocated space and pro rata share payments. The school district may, at its sole discretion, reduce the amounts owed by the charter school.

(c) With respect to charter schools established at existing public school sites pursuant to *Education Code sections 47605(a)(2), 52055.5, 52055.55, or 52055.650*, the provisions of this section are limited by the applicable provisions of subdivisions (c) and (d) of section 11969.3.

AUTHORITY:

Note: Authority cited: *Sections 33031 and 47614(b), Education Code*. Reference: *Sections 41601, 42263, 47605, 47614, 47633, 52055.5, 52055.55 and 52055.650, Education Code*.

**HISTORY:**

1. New section filed 7-30-2002; operative 8-29-2002 (Register 2002, No. 31).
2. Amendment of subsection (a), new subsection (c) and amendment of Note filed 2-28-2008; operative 3-29-2008 (Register 2008, No. 9).



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5 CCR 11969.9 (2011)

§ 11969.9. Procedures and Timelines for the Request for, Reimbursement for, and Provision of, Facilities

(a) A charter school must be operating in the school district as defined in *Education Code section 47614* before it submits a request for facilities. A new or proposed new charter school is operating within the school district and, therefore, eligible to request facilities for a particular fiscal year only if it submitted its charter petition pursuant to *Education Code sections 47605, 47605.5, 47605.6, or 47605.8* on or before November 1 of the fiscal year preceding the year for which facilities are requested. A new charter school is entitled to be allocated and/or provided access to facilities only if it receives approval of the petition before March 15 of the fiscal year preceding the year for which facilities are requested.

(b) To receive facilities during a particular fiscal year, a charter school must submit a written facilities request to the school district on or before November 1 of the preceding fiscal year.

(c)(1) The written facilities request consists of:

(A) reasonable projections of in-district and total ADA and in-district and total classroom ADA, based on ADA claimed for apportionment, if any, in the fiscal year prior to the fiscal year in which the facilities request is made, adjusted for expected changes in enrollment in the forthcoming fiscal year;

(B) a description of the methodology for the projections;

(C) if relevant (i.e., when a charter school is not yet open or to the extent an operating charter school projects a substantial increase in in-district ADA), documentation of the number of in-district students meaningfully interested in attending the charter school that is sufficient for the district to determine the reasonableness of the projection, but that need not be verifiable for precise arithmetical accuracy;

(D) the charter school's operational calendar;

(E) information regarding the district school site and/or general geographic area in which the charter school wishes to locate; and

(F) information on the charter school's educational program, if any, that is relevant to assignment of facilities.

(2) Projections of in-district ADA, in-district classroom ADA, and the number of in-district students shall be broken down by grade level and by the school in the school district that the student would otherwise attend.

(3) School districts may require the charter school to submit its facilities request containing the information specified in paragraphs (1) and (2) on a form available from the CDE and developed in consultation with the Advisory

Commission on Charter Schools (ACCS) or another form specified by the school district. School districts may also require the charter school either to distribute a reasonable number of copies of the written facilities request for review by other interested parties, such as parents and teachers, or to otherwise make the request available for review.

(d) The school district shall review the charter school's projections of in-district and total ADA and in-district and total classroom ADA and, on or before December 1, express any objections in writing and state the projections the district considers reasonable. If the district does not express objections in writing and state its own projections by the deadline, the charter school's projections are no longer subject to challenge, and the school district shall base its offer of facilities on those projections.

(e) On or before January 2, the charter school shall respond to any objections expressed by the school district and to the district's projections provided pursuant to subdivision (d). The charter school shall reaffirm or modify its previous projections as necessary to respond to the information received from the district pursuant to subdivision (d). If the charter school does not respond by the deadline, the district's projections provided pursuant to subdivision (d) are no longer subject to challenge, and the school district shall base its offer of facilities on those projections.

(f) On or before February 1, the school district shall prepare in writing a preliminary proposal regarding the space to be allocated to the charter school and/or to which the charter school is to be provided access. At a minimum, the preliminary proposal shall include (1) the projections of in-district classroom ADA on which the proposal is based, (2) the specific location or locations of the space, (3) all conditions pertaining to the space, including a draft of any proposed agreement pertaining to the charter school's use of the space, and (4) the projected pro rata share amount and a description of the methodology used to determine that amount. The district shall also provide the charter school a list and description of the comparison group schools used in developing its preliminary proposal, and a description of the differences between the preliminary proposal and the charter school's facilities request as submitted pursuant to subdivision (b).

(g) On or before March 1, the charter school shall respond in writing to the school district's preliminary proposal made pursuant to subdivision (f), expressing any concerns, addressing differences between the preliminary proposal and the charter school's facilities request as submitted pursuant to subdivision (b), and/or making counter proposals.

(h) On or before April 1, having reviewed any concerns and/or counter proposals made by the charter school pursuant to subdivision (g), the school district shall submit in writing a final notification of the space offered to the charter school. The notification shall include a response to the charter school's concerns and/or counter proposals (if any). The notification shall specifically identify:

(1) the teaching station, specialized classroom space, and non-teaching station space offered for the exclusive use of the charter school and the teaching station, specialized classroom space, and non-teaching station space to which the charter is to be provided access on a shared basis with district-operated programs;

(2) for shared space, the arrangements for sharing;

(3) the in-district classroom ADA assumptions for the charter school upon which the allocation is based and, if the assumptions are different than those submitted by the charter school pursuant to subdivision (e), a written explanation of the reasons for the differences;

(4) the specific location or locations of the space;

(5) all conditions pertaining to the space;

(6) the pro rata share amount; and

(7) the payment schedule for the pro rata share amount, which shall take into account the timing of revenues from the state and from local property taxes.

(i) The charter school must notify the school district in writing whether or not it intends to occupy the offered space. This notification must occur by May 1 or 30 days after the school district notification pursuant to subdivision (h), whichever is later. The charter school's notification can be withdrawn or modified before this deadline. After the deadline, if the charter school has notified the school district that it intends to occupy the offered space, the charter school is committed to paying the pro rata share amount as identified. If the charter school does not notify the school district by this deadline that it intends to occupy the offered space, then the space shall remain available for school district programs and the charter school shall not be entitled to use facilities of the school district in the following fiscal year.



## 5 CCR 11969.9

(j) The space allocated to the charter school by the school district (or to which the school district provides the charter school access) must be furnished, equipped and available for occupancy by the charter school for a period of at least ten working days prior to the first day of instruction of the charter school. For good cause, the period is subject to reduction by the school district, but to no fewer than seven working days.

(k) The school district and the charter school shall negotiate an agreement regarding use of and payment for the space. The agreement shall contain at a minimum, the information included in the notification provided by the school district to the charter school pursuant to subdivision (h). In addition:

(1) The charter school shall maintain general liability insurance naming the school district as an additional insured to indemnify the school district for damage and losses for which the charter school is liable. The school district shall maintain first party property insurance for the facilities allocated to the charter school.

(2) The charter school shall comply with school district policies regarding the operations and maintenance of the school facility and furnishings and equipment.

(3) A reciprocal hold-harmless/indemnification provision shall be established between the school district and the charter school.

(4) The school district shall be responsible for any modifications necessary to maintain the facility in accordance with *Education Code section 47610(d) or 47610.5*.

(l) The charter school must report actual ADA to the school district every time that the charter school reports ADA for apportionment purposes. The reports must include in-district and total ADA and in-district and total classroom ADA. The charter school must maintain records documenting the data contained in the reports. These records shall be available on request by the school district.

**AUTHORITY:**

Note: Authority cited: *Sections 33031 and 47614(b), Education Code*. Reference: *Sections 47605, 47605.5, 47605.6, 47605.8, 47610, 47610.5 and 47614, Education Code*.

**HISTORY:**

1. New section filed 7-30-2002; operative 8-29-2002 (Register 2002, No. 31).
2. Amendment of section and Note filed 2-28-2008; operative 3-29-2008 (Register 2008, No. 9).



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5 CCR 11969.10 (2011)

§ 11969.10. Mediation of Disputes

If a dispute arises between a school district and a charter school concerning the provisions of *Education Code section 47614* or this article, nothing in this article shall preclude the dispute being subject to mediation in accordance with the procedures set forth in this section, if agreeable to both parties. Mediation consists of the following:

(a) The initiating party shall select a mediator, subject to the agreement of the responding party. If, though agreeing to mediation, the parties are unable to agree upon a mediator, the CDE shall be requested by the initiating party to appoint a mediator within seven days to assist the parties in resolving the dispute. The mediator shall meet with the parties as quickly as possible.

(b) Within seven days of the selection or appointment of the mediator, the party initiating the dispute resolution process shall prepare and send to both the responding party and the mediator a notice of dispute that shall include the following information:

- (1) The name, address, and phone numbers of designated representatives of the parties;
- (2) A statement of the facts of the dispute, including information regarding the parties' attempts to resolve the dispute;
- (3) The specific sections of the statute or regulations that are in dispute; and
- (4) The specific resolution sought by the initiating party.

(c) Within seven days of receiving the information specified in subdivision (b), the responding party shall file a written response.

(d)(1) The mediation procedure shall be entirely informal in nature. However, copies of exhibits upon which either party bases its case shall be shared with the other party. The relevant facts shall be elicited in a narrative fashion to the extent possible, rather than through examination and cross-examination of witnesses. The rules of evidence will not apply and no record of the proceedings will be made.

(2) If an agreement is reached, the agreement shall be reduced to writing and shall be signed by the school district and the charter school. The agreement shall not set a precedent for any other case.

(3) If the school district and the charter school fail to meet within the specified time line, have not reached an agreement within 15 days from the first meeting held by the mediator, or if the mediator declares the parties at impasse, the mediation is terminated.

(e) The costs of the mediation shall be divided equally by the two parties and paid promptly.

**AUTHORITY:**

Note: Authority cited: *Sections 33031 and 47614(b), Education Code*. Reference: *Section 47614, Education Code*.

**HISTORY:**

1. New section filed 2-28-2008; operative 3-29-2008 (Register 2008, No. 9). For prior history, see Register 2002, No. 37.



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5 CCR 11969.11 (2011)

§ 11969.11. Operative Date of Changes

The changes to this article made during 2007 and 2008 and filed with the Secretary of State in February 2008 shall become operative with the requests submitted by charter schools during fiscal year 2008-09 for the use of facilities in fiscal year 2009-10.

AUTHORITY:

Note: Authority cited: *Sections 33031 and 47614(b), Education Code*. Reference: *Section 47614, Education Code*.

HISTORY:

1. New section filed 2-28-2008; operative 3-29-2008 (Register 2008, No. 9).