

California Common Interest Development Association
AFE Project Proposal Form – California Edition
For Fiscal Year _____

PRODUCTION READY BLANK TEMPLATE — CALIFORNIA RESERVE PROJECT

Project Information

CID Project ID	CID-
Project Name / Description	[Enter project name or brief description]
Recommended By / Reserve Study Source	[Enter name, title, reserve-study or inspection source]
Prepared By	[Enter name and title]
Date Prepared	[Enter date prepared]
Board Meeting Date	[Enter Board meeting date and open-meeting record reference]
Fiscal Year	FY _____
CID Type	☐ Condominium ☐ Planned development ☐ Stock cooperative ☐ Community apartment project

Reserve Classification

Reserve Account / Administrative Classification	[Use the Association's adopted reserve-account and accounting terminology. PRF/SRF is not California statutory terminology.]
Action Classification	☐ REQUIRED ☐ ELECTIVE ☐ EMERGENCY
Reserve Component Category	[Enter the reserve-study component category]
Major Component / Scope	[Identify the major component and proposed scope of work]
Project Type	☐ Repair ☐ Replacement ☐ Restoration ☐ Inspection ☐ Other
Permit / Code / Authority Review	[Record California code, local authority, permit, plan-review, inspection, and closeout determination]
Engineering / Professional Oversight	☐ Not required ☐ Recommended ☐ Required Professional:
Work / Change Type	☐ Maintenance ☐ Repair ☐ Replacement ☐ Alteration ☐ Structural / building-system work
Reserve Study / Funding Plan Reference	[Study date, annual review date, component line, funding-plan page or schedule]
Governing Document / Legal Basis	[Declaration, bylaws, operating rule, Civil Code provision, or other basis, if applicable]
Deferred Maintenance / Special Assessment Impact	[Describe any disclosed deferred work, funding shortfall, or anticipated special assessment impact]

Classification rationale: [State the basis for the reserve component, action classification, project type, scope, and selections above. Identify whether the work is scheduled in the current reserve study or reserve funding plan.]

California technical-work and permitting screening: confirm the applicable California code, local authority having jurisdiction, professional, permit, inspection, testing, and closeout requirements before authorization or commencement. Record the determination and supporting documents.

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Project Description and Funding

Description of Work	[Describe the condition, need, proposed scope, and expected result]
Recommended Vendor / Contractor	[Enter vendor or contractor, if known]
Estimated / Proposed Cost	\$ _____
Funding Option Recommended	☐ Existing reserve funds ☐ Regular reserve contributions ☐ Special assessment ☐ Loan / other lawful measure
Alternatives Considered	[Describe alternatives, including deferment, repair instead of replacement, or different scope]

Funding Method Comments	[Explain funding adequacy, timing, restrictions, and relationship to the adopted reserve budget or funding plan]
Proposed Start Date	[Enter proposed start date]
Proposed Completion Date	[Enter proposed completion date]

Itemized Listing of Costs

Item	Cost
Total Bid / Proposed Cost	\$ _____
Reserve Study Cost / Adopted Reserve Budget	\$ _____ / \$ _____

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Board Action

Board-Authorized Cost Limit	\$ _____ — not to exceed
Reserve Funding Source Approved	[Enter reserve account, assessment, loan, or other approved source]
Authorization Conditions / Notes	[Record funding conditions, scope limitations, permit or professional conditions, and any requirement for additional Board approval.]
Board Members Approving	[Enter names or number of directors approving]
Board Members Disapproving	[Enter names or number of directors disapproving]
Board Members Abstaining / Not Present	[Enter abstentions and members not present]
Board Action	[Summarize the motion, scope, funding source, authorized limit, approval date, open-meeting record, and minutes reference.]

Project Closeout

Project Status	☐ Proposed ☐ Authorized ☐ In progress ☐ Completed ☐ Deferred ☐ Cancelled
Completion Date	[Enter completion or closeout date]
Actual Cost to Date (Open Projects)	\$ _____
Outstanding Commitment (Open Projects)	\$ _____
Final Cost (Completed Projects)	\$ _____
Variance from Board-Authorized Limit	\$ _____ favorable / unfavorable
Closeout Notes	[Summarize completion, final invoices, permits, inspections, warranties, photographs, unresolved items, and records filed.]

Administrative Notes

- REQUIRED means scheduled by the current reserve study or reserve funding plan, required by applicable law or regulation, needed for an emergency repair, or needed to address life-safety or property-protection concerns. ELECTIVE means not scheduled for the current year and not structural, life-safety, or emergency work.
- Use the Association's California reserve-account and accounting terminology consistently with the reserve study, adopted reserve budget, reserve funding plan, governing documents, and financial records. PRF/SRF is an optional administrative classification, not California statutory terminology.
- The Board-authorized amount is the approved contract amount or not-to-exceed limit for a material or nonroutine project. Record the scope, reserve-funding source, motion or contract authority, approval date, open-meeting record, and minutes reference.
- This California AFE is a recommended administrative tool, not a form specifically required by statute. Use it, or an equivalent written project-authorization record, for material or nonroutine reserve projects. It does not replace the adopted reserve budget, reserve study, reserve funding plan, Board minutes, contracts, invoices, accounting records, permits, inspections, or other official records.