

Measures B, J & Y Independent Citizens' Bond Oversight Committee

Annual Fiscal Year 2023/2024 Report and Fiscal Year 2024/2025 Progress Report



Photo: Claremont Middle School Multi-Purpose Building

EXECUTIVE SUMMARY

The Measures B, J, and Y Independent Citizens' Bond Oversight Committee (CBOC) for the Oakland Unified School District (OUSD) has made the following observations and recommendations over the fiscal year of 2024/2025 in last years CBOC meetings:

- Do not proceed with moving up Solar projects ahead of more critical capital projects needs
- Do not cut previously approved funds for demolition of 1025 & demolition scope of Ralph Bunche
- Prioritize projects in historically marginalized schools and where the need was identified as the greatest in the Facilities Master Plan such as McClymonds and Garfield
- Bring voting items to CBOC prior to bringing to the School Board as required by OUSD CBOC bylaws

CBOC has toured all the current project facilities over the last year. Include observations/pictures here of Roosevelt MS, Claremont MS New Building, Laurel CDC, MLA (plan for new bldg), Cole Administration Building,



Photo: Laurel Child Development Center Playground

INTRODUCTION

This report was prepared by the Measures B, J, and Y Independent Citizens' Bond Oversight Committee (CBOC) for the Oakland Unified School District (OUSD) in accordance with California Education Code §15280(b) and OUSD Board Bylaw 9131, Section 2, Subparagraph 4. The purpose of this report is twofold: (1) provide a publicly available annual report of bond activities and expenditures; and (2) provide a review of the annual financial and performance audits of OUSD that are required by Article XIII A of the California Constitution. The first component primarily covers the period when CBOC meetings were held from August 2023 through May 2024. Due to the timing of the audit reports, the second component is a review of the auditor's finding for the fiscal year that ended June 30, 2024 (i.e., FY 2023-24) and was presented to CBOC in March 2025.

PURPOSE OF THE OUSD CITIZENS' BOND OVERSIGHT COMMITTEE

The OUSD CBOC is a state-mandated committee of local residents that oversees the approximately \$1.645 billion in School Facilities bonds approved by voters. According to state law (Cal. Educ. Code § 15278-15282), our job is to inform the public about the expenditure of bond revenues by reviewing and reporting on "the proper expenditure of taxpayers' money for school construction". California Law requires that "taxpayers directly participate in the oversight of bond expenditures" and "the members of the oversight committee appointed pursuant to this chapter promptly alert the public to any waste or improper expenditure of school construction bond money" Cal. Educ. Code § 15264.

In addition to the state-mandated oversight authority, in January 2021, the OUSD School Board approved additional oversight authority for the CBOC in Resolution No. 2021-0031, which is codified in Section 2 of Board Bylaw (BB) 9131. In addition to authorizing us to review the annual financial and performance audits, this resolution tasks us with "preparing a publicly available annual report of bond activities and expenditures." OUSD BB § 9131(2)(4). The Board Bylaws further provide that the CBOC's authority includes "reviewing and making advisory recommendations to the OUSD Board of Directors regarding proposed alterations to project budgets, timelines, and other changes to bond program expenditures that are subject to OUSD Board of Directors approval." OUSD BB § 9131(2)(8).



Photo: Ribbon-cutting Ceremony at Claremont Middle School

BOND BACKGROUND

In June 2006, Oakland voters passed **Measure B, a \$435 million** School Facilities Improvement Bond which provided funding to the Oakland Unified School District (OUSD). Except for some remaining fire alarm projects, all Measure B funds have largely been spent prior to fiscal year 2019-2020.

In June 2012, Oakland voters passed **Measure J, a \$475 million** School Facilities Improvement Bond, for OUSD to enhance the educational environment for the students and communities of Oakland and better prepare students for college and jobs. Bond funds have been allocated to upgrade science labs, classrooms, computers, and technology; improve student safety and security; repair bathrooms, electrical systems, plumbing and sewer lines; improve energy efficiency; and make seismic upgrades.

In November 2020, Oakland voters passed **Measure Y, a \$735 million** School Facilities Improvement Bond, for OUSD to provide, among other things, classroom repair and school safety improvements, upgrading classrooms, science labs and technology; improving student safety and security; repairing bathrooms, electrical systems, plumbing and sewers; and improving energy-efficiency and earthquake safety.



Photo: Interior of Multi-Purpose Room at Claremont Middle School

BOND PROJECT OVERVIEW

OUSD completed ANY PROJECTS? Cole, CLAREMONT, Kaiser, Laurel ES, funded by Measure Y between 2023 and 2024 – (MEASURE J, MEASURE B MENTION) Please see the CBOC’s May 2021 annual report for a list of projects completed with Measure J funding that year.) Several projects discussed below were in the planning, demolition and/or construction phases in 2022-23.

The following are notable projects that remain in-progress and rely on, or will rely on, Measure J and Measure Y funds:

- **Cole Administrative Office Conversion:** (COMPLETE) The building is completed and has been turned over to the District, Leadership and Admin Team are using the facility. The first floor of this building is completely empty and is an underutilized OUSD asset that could either be generating revenue or serving the community.

OUSD converted what used to be Cole Elementary School into district administrative office space. The project consists of a new 56,176 sf two-story Administration building, with OUSD solely occupying the second story. Site improvements include landscaping, fences, parking lots, and driveways on the 2.6-acre site. The construction phase began in 2021. OUSD originally identified \$57 million in Measure J and Y funding for this project. The Board subsequently approved **\$6,588,513.88** in change orders for this project.
- **Claremont Multi-Purpose Building:** (COMPLETE) The new kitchen and multipurpose room Project was completed in mid 2024. Construction began in summer of 2022 of the new building to replace the kitchen that was destroyed by a fire. The kitchen that was destroyed by a fire was replaced and a new multi-purpose room was built at Claremont Middle School. Construction began in summer 2022. OUSD identified \$21 million in Measure Y funding for this project. The project is complete and in use.
- **Coliseum College Prep Academy (CCPA):** The project consists of demolition of eight existing portable classrooms and construction of 16 new classrooms in a two-story modular building, to include classrooms, two science laboratories and rooftop solar panels; and construction of a new gymnasium building. Since our last report, the Schematic Design package has been completed and work has begun on preliminary preparation for State approvals. Construction is to commence in Q3 2026, with completion scheduled for Q4 2027. OUSD originally identified \$35,500,000 and subsequently increased that allocation to \$55,000,000 to account for increased construction costs and to adhere to DSA standards and state specifications.
- **Fremont High School:** This project includes a new modular building to replace and the existing non conforming shop classrooms.
- **GARFIELD ELEMENTARY SCHOOL:** The OUSD Board approved a budget of \$56.7 million for this project in 2023/2024. The project consists of modernization to address major deficiencies identified in the 2019 Facilities Conditions Assessment and provide upgraded learning environments. Scope is expected to be completed by the end of Q2, 2024, pending input by site-based Project Advisory Committee. Construction is expected to start in Q2 of 2026, with completion in Q4 of 2027.
- **Kaiser Early Childhood Learning Center:** This project was completed in August 2024 and included site improvements to the outdoor learning and play area, modernization of the fire alarm system, replacing the A/C paving adjacent to the site, and installation of turf in the play yard.



Photo: Laurel Child Development Center - Classroom Exteriors and Outdoor Spaces

- **Laurel CDC:** (COMPLETE) This project was completed in 2024 and occupied by students and staff in fall of 2024. The project consisted of building new classrooms, administrative, foodservice, and other spaces. Site work included new paved play and learning spaces. Construction began in fall 2022, with a planned completion of winter 2023. OUSD has identified \$17.5 million in Measure J and Y funding for this project.
- **McClymonds High School:** The project consists of modernizing various aspects of the school's facilities. Modernization of the entire campus which includes indoor, outdoor and building systems improvements. Since our last report, delivery of 100 percent schematic design set pricing has been provided to the District for review, and the Design Development Phase has begun. A Hazmat RFP has been issued. Project construction is to begin Q2 of 2025, with completion scheduled for Q1 2027. OUSD originally identified \$65 million in Measure Y funding for this project, and subsequently increased that allocation to \$91.25 million to account for increased construction costs and to adhere to DSA standards and state specifications. A change order of \$1,238,252 has been approved by the Board.
- **MELROSE LEADERSHIP ACADEMY:** A modernization or expansion of the Maxwell Park campus to be determined in coordination with the school site. Base scope will include structural, ADA compliance, fire alarm, HVAC, and electrical systems upgrade. Scope was reduced by \$13 million to address Maxwell Campus only as part of a change in spending plan to address rising construction costs and other projects needs. Architects have started schematic design and an RFQ/P has been prepared to select lease/lease-back entity. The project will include a new two story classroom building on the lower yard,
- **OUSD Solar Projects:** In March of 2025 Facilities staff put up for a new reallocation plan that identified

8 plus million dollars for two solar package projects which the Board approved.

Background: In 2022/2023 Fiscal year The project includes the installation of photo-voltaic panels at 17 different school sites, spread across the entire school district. Several sites will receive new roof solar array panels, while others will receive a play yard, play field or parking shade structures to house the solar panels. Construction is planned to begin in spring 2023, with planned completion in fall 2024. OUSD has identified \$1.2 million in Measure Y funding for this project.

- **Roosevelt Middle School:** The project consists of structural upgrades to the main building; upgrades to indoor spaces, mechanical heating, cooling, ventilation, plumbing, re-roofing, lighting, main entry, fire, intrusion, and sprinkler systems; right-sizing of classrooms, and upgrades to outdoor spaces site utilities, landscaping, and garden. Since our last report, project scoping has been completed and a General Contractor has been selected. Construction is planned to start Q2 of 2025. Completion is anticipated in Q3 of 2028. Project completion is scheduled for Q21 2027. This timeline was adjusted to account for delays to interim housing approvals. OUSD originally identified a budget of \$70,600,000 and subsequently increased that allocation to \$90,550,000 to account for increased construction costs and to adhere to DSA standards and state specifications. While no change orders have been requested, staff's financial outlook identified possible increases in the range of \$6 to \$7.5, based on current information.

BOND PROGRAM OVERSIGHT

Kenya Chatman was the OUSD Executive Director of Facilities Planning and Management during fiscal year 2023/2024, the period covered by this report. Ms. Chatman and her staff are the primary points of contact for the CBOC committee. Kenya Chatman resigned in mid May 2025. As of the date of this report a replacement to fill her position has not been announced. Publicly noticed meetings of the CBOC are typically held on the second Monday of each month from August through June. Scheduling information and meeting agendas are available at www.ousd.org/domain/67 under the body "Measures B, J, and Y Independent Citizens' School Facilities Bond Oversight Committee. Meetings are typically held in person at Committee Room, KDOL TV Studio, B-237, Met West High School Entrance, 314 East 10th Street, with an option for the public to participate remotely.

OUSD provided the 2023-2024 Financial and Performance Reports to this committee on March 10 2025,(together, the "Audit Reports"). Eide Bailly, a third-party CPA and business advisor firm, prepared the Audits Reports, which are discussed in more detail below.



Photo: Solar Project at Highland Community School

Citizens' Bond Oversight Committee

CBOC's responsibility is to actively review and report on the expenditure of taxpayers' money for school construction with voter-approved projects in accordance with Cal. Educ. Code § 15278. In addition, OUSD Resolution No. 2021-0031, which is codified in Section 2 of Board Bylaw (BB) 9131, requires Staff to present to this committee for review and advice any substantial changes to project scope, budget or timeline that are subject to Board of Education approval.

Over the past year, the committee held in person public meetings on our regular monthly schedule and reviewed program expenditures and other facility reports pertinent to expenditures of bond revenues. We have begun to once again conduct project site visits as part of our regular work and were able to visit the currently on-going bond projects. In addition to the members listed in Table 1, David Colbert was the OUSD Staff Liaison to the committee and OUSD Board Member Valerie Bachelor was the Facilities Committee lead.

Table 1: 2024-2025 CBOC Members and Roles

Name	Role
Andrew Butler	Chairperson
Alexandra Park	Vice Chairperson
Viola Gonzales	Secretary
Anana Clark	Member
Angela Darby	Member
Andrea Dawson	Member
John Jones III	Member
Sarah Price	Member

Photos: (Below) CBOC Members on Site Visits to McClymonds High School and Claremont Middle School



CBOC OBSERVATIONS AND CONCERNS

CBOC appreciates the efforts of OUSD Facilities Staff and Board Office Staff to manage CBOC meetings and present information to our committee each month. Facilities Staff members are generally responsive to our concerns and strive to provide the information that our committee requests in a format that is most helpful to us.

The CBOC notes the following specific observations related to bond expenditures:

- **Facilities Master Plan Update:** The Facilities Master Plan (FMP) is the foundational document to guide the District's decisions related to its facilities needs and is currently being updated. The District and the Board should be using the results of the FMP to not only identify projects, but also to prioritize projects. CBOC members have made the following recommendations for the current and future FMP efforts:
 - **Survey a larger cross-section of staff, students and families regarding facility conditions and use.** Currently, each site is visited for a period of 2-4 hours and one or two people are interviewed at each site for facility assessment. A survey was developed this year and sent out through ParentSquare, so that was a start to improving the data. However, many people miss ParentSquare messages. The survey could also ask more specific data questions to help target classroom conditions that can be utilized in prioritizing necessary facility repairs (i.e. classroom temperatures being too hot or cold would likely indicate issues with HVAC, are facilities run down/paint chipping, do toilets and sinks function, etc.). Survey questions could be developed with input from school administration, staff, and students to gather even more complete information. These surveys could also be sent to site administration with clear communication that the responses to the survey will directly affect the recommendations for OUSD Facilities improvements.
 - **Include an executive summary in the beginning of the FMP summarizing recommendations and clearly stating which facilities are in worst condition as well as information regarding the population served at these facilities (income levels and demographics served by that facility). This information should be used as a guideline for scheduling/prioritizing projects.**

As the Audit notes, Board Policy (BP 7110) mandates that the District update the FMP "every five years in its entirety and also updated annually as to work accomplished in the prior year as well as the District's demographics."

- **Continued Improvements in Financial Reports and Inclusion in Process for Substantial Change:** Staff continues to be responsive to requests for changes to the financial reports. For the most part these reports are clear and presented to us in a timely manner. In fall of 2023, staff presented change orders to the Cole Administrative project which enabled us to share concerns and feedback to the Board in a timely fashion.

The major project Facts Sheets are an important addition to the information we receive. They enable us to track projects and be able to report to the community spending and timeline changes. We are in consultation with staff about some improvements to the Fact Sheet formats, which we expect to see in the coming months.

- **Change Order Reporting to Board and CBOC Process Needs Improvement:** We note that the current process for reporting change orders lacks any meaningful review opportunities for either the CBOC or the Board. While some change orders are both unavoidable and must be expedited in order to

conform to construction timelines, many others are not. We discovered this year that change orders are routinely reported to the Board **after** a commitment to the expenditure has been made to the payee. For instance, we found that a change order to add a stairwell at Cole at staff's discretion had been executed with no review by the Board or CBOC. CBOC by-laws require that project alterations, including change orders, are reported to CBOC at the same time that they are reported to the Board, yet as the audit notes "there is no defined policy for reporting meaningful change orders to key stakeholders." We want to work with staff and the Board to create a process whereby, at a minimum, change orders initiated at staff discretion (i.e. owner-initiated change orders) are available for review prior to expenditure approval.



Photo: Laurel Child Development Center - Main Entrance and Accessible Curb

Annual Financial and Performance Audit Review and Findings

CBOC's primary duty is to provide a written statement on compliance for the public on both our review of the bond program expenditures and activities and the independent auditor's Financial and Performance Audit to ensure that Measure B, J and Y bond funds are spent in accordance with the bond language.

Each fiscal year a financial and performance audit of Measures B, J, and Y expenditures is required to be conducted. Eide Bailey LLP was contracted to conduct the performance and financial audit of Measures B, J and Y for the year ending June 30, 2024. This committee received the Audit Reports on March 10, 2025 and received a presentation of the findings from Eide Bailey LLP during our regular meeting on March 10, 2025.

The Audit Reports are available for review on the District website (www.ousd.org/domain/67) by searching for **file number 24-0878**.

CBOC COMPLIANCE STATEMENT

In accordance with Cal. Educ. Code § 15278 (b), the CBOC is tasked with advising the Board of Education and the public on OUSD's compliance with the California Constitution's requirements related to the expenditure of bond funds. None of the observations and concerns with the expenditure of bond funds noted in the report rise to a level that constitutes improper use of bond funds. We therefore **find that OUSD is in compliance** with the requirements of Article XIII A, Section 1(b)(3) of the California Constitution.



Photo: Solar Project at Lockwood Steam Academy