



OAKLAND UNIFIED SCHOOL DISTRICT

Community Schools, Thriving Students

# 2009 - 2010 Measure B Independent Citizens' Bond Oversight Committee Annual Report

[www.ousd.k12.ca.us/facilities](http://www.ousd.k12.ca.us/facilities)

Produced June 2011



Artist's Rendering - Construction to Begin Summer 2011

## The New State-of-the-Art LaEscuelita Education Center



OAKLAND UNIFIED SCHOOL DISTRICT

Community Schools, Thriving Students

### Together, We Are Building

a full-service community school district that serves the whole child, eliminates inequity and provides each child with an excellent teacher, every day.



Building for the Future ....New LaEscuelita Education Center

# Expect Success

## Bond Background

Since the passage of the \$435 million Measure B School Facilities Improvement Bond (Measure B or the Bond) on June 6, 2006, Oakland public schools have undergone some of the most large-scale renovations that have occurred in many decades.

This annual report summarizes the work of the Independent Citizens' Bond Oversight Committee (CBOC or the Committee) and reviews the expenditures in the Measure B capital improvement program for fiscal year 2009-2010.

## Measure B Projects

The legal guidelines for spending Measure B funds require that the Oakland Unified School District ("the District") restrict expenditures to those projects the District proposed to finance with bond proceeds as described in a bond project list. Among the major improvements are modernization of existing sites, two-story additions to replace portables at school sites and upgrades to address accessibility issues, all made possible by the generous support of Oakland taxpayers.

The scope of the Bond includes renovations and repairs to classrooms, auditoriums and multipurpose rooms, as well as renovation and construction of playgrounds and gymnasiums. Proceeds are also financing construction of new educational facilities such as the LaEscuelita Education Center featured on the cover. The long-awaited LaEscuelita Education Center, will contain the new state-of-the-art La Escuelita Elementary School, Met West High School, combined Child Development Centers and a community health clinic. The design vision is for an integrated campus that fosters an enhanced teaching and learning environment for K-12 students on just 5.7 acres.

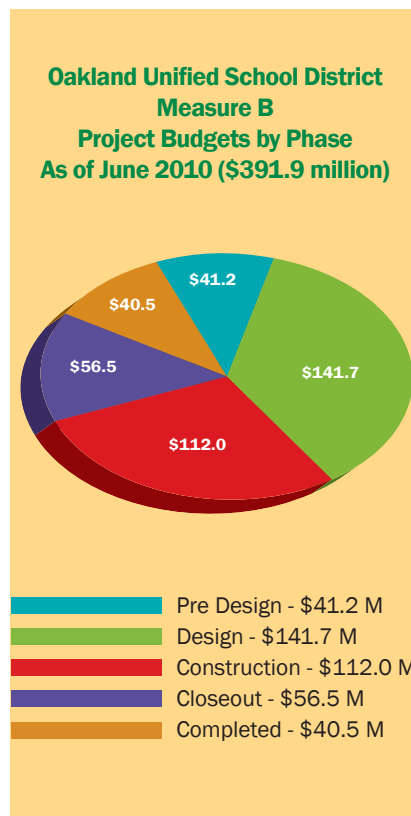
Other projects on the bond project list are Pre-School/Early Childhood Development Centers, outside funding for deferred maintenance and repair, and rehabilitation and modernization of existing student-based health centers.

From the inception of Measure B through fiscal year 2009-2010, the Board of Education has approved 107 projects and increases to two existing projects with a total combined value of \$391.9 million. As stipulated by the bond, these projects meet the categorical requirements for use of funds at various elementary, middle and high schools.

As of June 2010, the remaining \$43.1 million has not been fully programmed. However, planning activities are underway to develop future projects at various sites. These projects will be taken to the Board of Education for approval once the final budgets and related scope of work have been developed and finalized.

## Leveraging Measure B Funds

The Facilities Master Plan approved in 2006 as part of the Measure B process identified approximately \$900 million of need to fully repair, replace and modernize the District's school facilities. To augment the \$435 million Bond, the District has sought federal and state matching program funds. As of June 2010, the District had identified potential matching funds of about \$55 million.



Jefferson Elementary School View #1



Jefferson Elementary School View #2

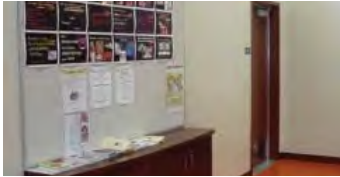


Jefferson Elementary School View #3

# CBOC Activities



Madison Health Center Reception Area



Madison Health Center

## Purpose and Duties of the CBOC

As required by the Education Code Section 15278, the District appointed an Independent Citizens' Bond Oversight Committee designed to inform the public about how the Bond is being spent. The Committee's responsibilities require it to actively review and report on the proper expenditure of taxpayers' money for school construction and to ensure that bond funds are spent in accordance with the language of the bond.

During the 2009-2010 Fiscal Year, the CBOC continued to engage in a number of important activities, including the review of expenditures and conducting project visits to observe construction progress. The committee is comprised of up to 11 individuals, including a chairperson, vice chairperson, secretary and eight members. The Citizens' Bond Oversight Committee engaged in many important activities throughout fiscal year 2009-2010 ranging from project visits to review of program expenditures. The CBOC conducted 7 project tours, which included visits to over 19 schools. Meeting dates in 2009-2010 included: July 14, August 18, September 22 and October 27, 2009; and February 2, March 16, May 18 and June 22, 2010.

## CBOC Project Visits 2009 - 2010\*

### October 2, 2009

- ◆ Cox Elementary
- ◆ Elmhurst Middle School
- ◆ Madison Middle School

### February 5, 2010

- ◆ Castlemont High School
- ◆ New Highland Elementary

### November 6, 2009

- ◆ Chabot Elementary
- ◆ Montclair Elementary
- ◆ Montera Middle School

### March 5, 2010

- ◆ Havenscourt Middle School
- ◆ Coliseum College Preparatory Academy
- ◆ Fremont Federation of High Schools

### December 4, 2009

- ◆ Life Academy at Proposed Site
- ◆ LaEscuelita Education Center
- ◆ Lincoln Elementary

### May 7, 2010

- ◆ Hintl Kuu CDC
- ◆ Laurel CDC

### January 8, 2010

- ◆ Jefferson Elementary
- ◆ Urban Promise Academy
- ◆ Oakland High School

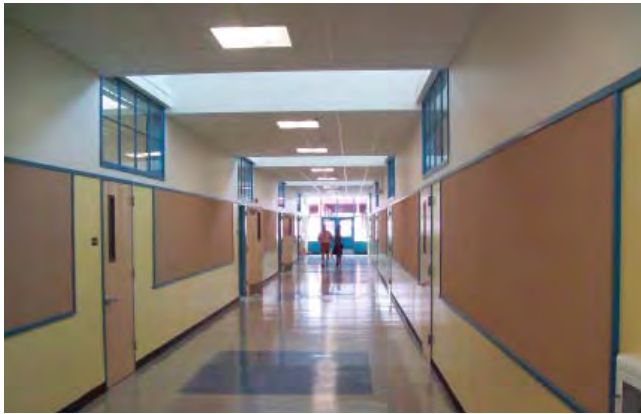
The current annual report was prepared under the auspices of the 2009-2010 CBOC. The 2009-2010 membership of the Committee is listed below.

### COMMITTEE MEMBERS 2009 / 2010\*

Chair	Renee Swayne, Senior Citizen Representative	District 5
Vice Chair	Andrea Dawson, Community Member	At Large
Secretary	Tracy Amaro, Parent and Business Community Member	District 6
Member	Jamie Flaherty-Evans, PTA/School Site Council Member and Parent	District 4
Member	Odest Logan, Parent or Guardian	District 7
Member	Jean Marie Moore, Business Community Member	At Large
Member	Frank Tsai, Community Member	District 2
Member	Chistopher Vernon, Parent and Community Member	District 3
Member	Patricia Williams, Parent and Community Member	District 1

\*Represents the school year 07/01/09 - 06/30/10

# Audit Review and Findings



Cox Elementary - Newly Renovated Hallway



Cox Elementary - Framing for New Building



Arroyo Viejo Child Development Center - Architect's Rendering



Oakland High School - Framing for New Building

## Annual Expenditure Review

One of the most important duties entrusted to the Committee is to ensure that Measure B funds are expended in accordance with Bond language and their intended uses. To assist the Committee's work, a Measure B capital expenditure report is regularly provided to the CBOC. The charts on the following pages present summary expenditures of 2009-2010 for each project that has been reviewed by the Committee. The report groups the projects into phases ranging from Pre-Design to Completed and shows a subtotal of expenditures for each phase. The expenditures for the 2009-2010 fiscal year totaled \$45.9 million, and the cumulative expenditures for the program were \$154 million through June 30, 2010.

## Fiscal and Performance Audit

As required by Measure B, each year a fiscal and performance audit is conducted on expenditures charged to the Bond. The 2009-2010 audit, conducted by Thompson, Cobb, Bazilio

& Associates, reported no material exceptions regarding the nature and validity of expenditures. Overall, the audit found the following:

1. Measure B Bond funds were expended only for the purposes described in the bond measure
2. OUSD procurement policies and procedures were consistent with the California State procurement laws, but there were no specific guidelines in place to ensure employee compliance and disclosure of OUSD and state conflict of interest laws
3. Internal controls over the review and approval processes for Measure B invoices were adequate
4. Further improvements could be made to contract file documentation
5. Improved invoice processing procedures are needed to ensure timely payment of invoices.

The audit provided recommendations for improvement and management plans to

incorporate these recommendations as appropriate.

## Summary

The CBOC is pleased to report that in over 60 projects the Oakland Unified School District is delivering on its promise as contained in Measure B Bond language, enhancing the learning environment for Oakland students.

Generally, projects were delivered within budget and the expected timeline. Other projects are in various stages of design, a process that includes input of students, parents, administrators and community stakeholders.

As outlined in the report, an independent audit of the Measure B Bond management and related expenditures was completed and the CBOC reports that no material findings or exceptions were noted.

For more detailed information visit:

<http://publicportal.ousd.k12.ca.us/19941081117574070/lib/19941081117574070/20100915134014.pdf>

# Expenditures

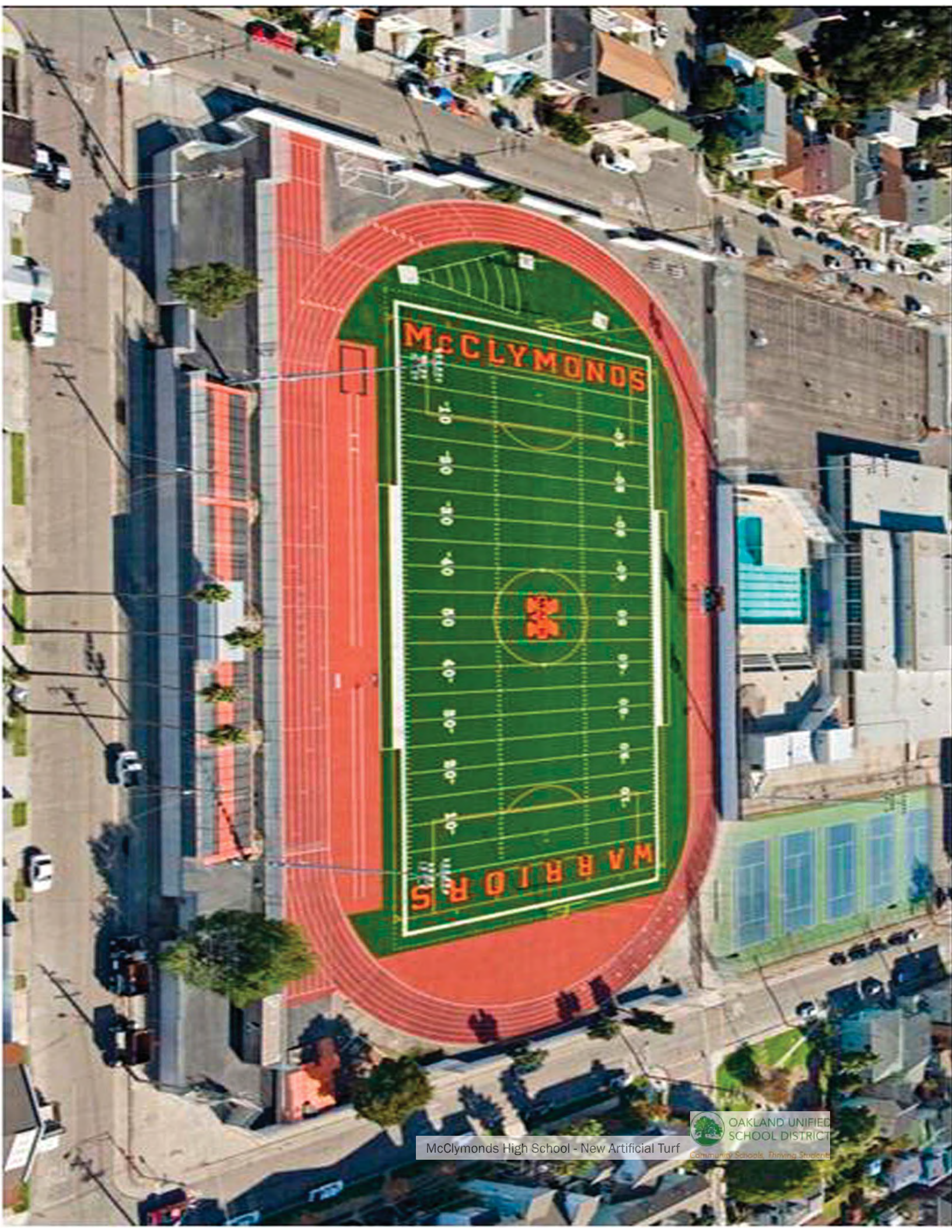
Site	Project	Board Approved Project Budget	Prior Year Expenditures (06/07 - 08/09)	Current Year Expenditures (09/10)	Cumulative Expenditures	Variance
Life Academy	Life Academy Renovation Seismic/Reno	\$16,000,000	\$ -	\$178,282	\$ 178,282	\$15,821,718
Parker	CDC Replacement	541,500	-	-	-	541,500
Burbank (Explore)	Small Schools	1,366,600	-	-	-	1,366,600
McClymonds Small Schools	Small Schools	2,800,000	79,347	-	79,347	2,720,653
Fremont Federation	Modernization Phase 3	10,000,000	545,932	-	545,932	9,454,068
Lazear Elementary	Modernization	2,300,000	35,724	4,500	40,224	2,259,776
Melrose	Small Schools (Bridges)	700,000	-	-	-	700,000
Washington Small Schools	Small Schools (Sankofa)	7,481,661	-	-	-	7,481,661
<b>Pre Design</b>		<b>41,189,761</b>	<b>661,003</b>	<b>182,782</b>	<b>843,785</b>	<b>40,345,976</b>
Calvin Simmons	Health Center	1,327,038	64,958	123,878	188,835	1,138,203
Whittier	New Building	3,000,000	-	-	-	3,000,000
Downtown	New Educational Complex	33,000,000	-	-	-	33,000,000
Roosevelt Middle School	Health Center	1,298,924	89,730	24,544	114,274	1,184,650
Arroyo Viejo	CDC Replacement	3,064,500	-	311,454	311,454	2,753,046
Havenscourt Middle	Classroom and Cafeteria	12,234,000	-	470,925	470,925	11,763,075
Havenscourt Middle	Health Center	1,376,080	6,663	51,656	58,319	1,317,761
Hintil	CDC Replacement	3,275,200	-	73,265	73,265	3,201,935
Laurel Elementary	CDC Replacement	3,889,800	-	195,557	195,557	3,694,243
Montclair	New Classroom	17,124,286	36,274	1,069,917	1,106,191	16,018,095
Stonehurst	CDC Replacement	3,963,824	-	103,456	103,456	3,860,368
Skyline High School	Skyline HS Wellness Center	750,000	-	30,761	30,761	719,239
Frick	Frick Wellness Center	750,000	-	24,146	24,146	725,854
Elmhurst Middle School	Elmhurst wellness Center	750,000	-	21,510	21,510	728,490
Highland Small Schools	Portable	16,733,142	183,308	998,846	1,182,155	15,550,987
Downtown Ed. Complex	Downtown Ed. Com. Wellness Center	750,000	-	-	-	750,000
Downtown Ed. Complex	LaEscuelita Education Center	75,000	-	135,030	135,030	(60,030)
District-wide	Playground Inspections & Repair	1,600,000	89,070	6,487	95,557	1,504,443
Lowell Middle	Modernization	11,910,000	-	956,934	956,934	10,953,066
Lowell Middle	Health Center	1,193,660	-	46,294	46,294	1,147,366
Elmhurst Middle	Modernization/ Small Schools	7,300,000	1,165,000	278,242	1,443,242	5,856,758
Madison Middle	Health Center	1,264,150	25,204	44,621	69,825	1,194,325
Havenscourt Middle	Modernization	3,451,708	2,111,665	125,715	2,237,380	1,214,329
Laurel Elementary	Fire Alarm Replacement	160,000	19,883	2,879	22,762	137,238
Manzanita Elementary	Modernization	3,950,064	1,944,172	64,349	2,008,521	1,941,543
Ralph Bunche	Modernization	7,500,000	727,726	956,782	1,684,507	5,815,493
<b>Design</b>		<b>141,691,376</b>	<b>6,463,652</b>	<b>6,117,247</b>	<b>12,580,899</b>	<b>129,110,477</b>
Chabot Elementary	Portable	18,900,000	8,775,367	7,988,188	16,763,554	2,136,446
Urban Promise Academy	Multi-purpose Gym	7,577,803	778,057	3,294,546	4,072,603	3,505,200
Montera	Modernization	6,535,000	495,982	48,517	544,500	5,990,500
Montera	Fire Alarm	525,000	31,210	-	31,210	493,790
Prescott Small Schools	Small Schools (PLACE)	3,475,000	287,113	48,772	335,884	3,139,116
Jefferson Elementary	Portable	23,000,000	1,677,119	2,219,758	3,896,877	19,103,123
Stonehurst	Restroom Renovation	1,380,000	58,335	17,637	75,972	1,304,028
Highland Small Schools	Fire Alarm Upgrade	400,000	27,211	226,619	253,829	146,171
Oakland High	Health Center	2,751,625	238,378	149,948	388,326	2,363,299
Oakland High	Modernization	25,197,597	2,817,161	12,568,131	15,385,292	9,812,305
Cox Elementary	Additional Classroom	16,695,000	6,842,526	6,119,529	12,962,055	3,732,945
Cox Elementary	Modernization/ Small Schools	5,551,570	1,193,610	3,854,154	5,047,764	503,806
<b>Construction</b>		<b>111,988,595</b>	<b>23,222,067</b>	<b>36,535,799</b>	<b>59,757,866</b>	<b>52,230,729</b>

Site	Project	Board Approved Project Budget	Prior Year Expenditures (06/07 - 08/09)	Current Year Expenditures (09/10)	Cumulative Expenditures	Variance
Oakland High	Williams Settlement	18,484,338	18,030,250	31,887	18,062,137	422,201
Castlemont	Auditorium Renovations	3,570,000	3,328,773	226,172	3,554,945	15,055
Madison Middle	Modernization	8,798,084	6,882,170	469,377	7,351,548	1,446,536
Cole Middle School	Renovations	979,839	978,749	1,090	979,839	-
Cole Middle School	Health Center	71,950	71,950	-	71,950	-
Manzanita Elementary	Small Schools	150,000	-	-	-	150,000
Lincoln Elementary	Portable Replacement	9,091,800	6,834,993	1,132,444	7,967,437	1,124,363
Stonehurst	Small Schools (Esperanza)	610,000	242,874	168,879	411,752	198,248
Peralta	Modernization	1,739,308	1,126,512	234,648	1,361,160	378,148
Calvin Simmons	Modernization/Small Schools	4,232,059	3,827,081	52,025	3,879,106	352,953
Hoover	Modernization	4,504,462	4,111,652	12,801	4,124,453	380,009
Whittier	Modernization	4,294,240	3,676,481	13,834	3,690,314	603,926
<b>Close Out</b>		<b>56,526,079</b>	<b>49,111,484</b>	<b>2,343,156</b>	<b>51,454,640</b>	<b>5,071,440</b>
Arts Far West	Intercom/PA/Clock Repairs	206,315	126,194	-	126,194	80,121
Oakland Tech	Oakland Tech Modernization	3,547,187	3,257,843	68	3,257,912	289,275
McClymonds	McClymonds intercom/PA/clock Repairs	287,321	226,170	1,240	227,410	59,911
Cleveland Elementary	Modernization Phase 2	4,204,295	3,800,121	1,004	3,801,124	403,171
Bret Harte Middle	Modernization	5,814,622	4,740,146	31,076	4,771,223	1,043,399
Emerson Elementary	Modernization	4,277,550	3,897,676	1,591	3,899,267	378,283
Carter Middle	Modernization	3,325,000	2,866,530	84,495	2,951,025	373,975
Sequoia	Sequoia Portable Installation	80,000	73,581	-	73,581	6,419
Laurel Elementary	Modernization	2,108,060	1,860,180	29,824	1,890,003	218,057
Redwood Heights Portable	Portable addition	157,500	142,787	-	142,787	14,713
Acorn/Woodland Library		500,000	-	497,065	497,065	2,935
Westlake	Modernization	10,375,000	5,457,641	39,251	5,496,892	4,878,108
Cole Middle School	Intercom/PA/Clock Repairs	182,992	146,351	-	146,351	36,641
Highland Small Schools	Interim Housing	400,000	215,924	-	215,924	184,076
Highland Small Schools	Modernization/ Small Schools	1,300,000	856,188	8,628	864,816	435,184
Joaquin Miller	ADA Accessibility	11,460	-	-	-	11,460
King Estates Small Schools	Small Schools	3,500,000	704,245	66	704,311	2,795,689
Lafayette	Intercom/PA/Clock Repairs	75,877	66,506	-	66,506	9,371
Webster Academy	Portable Demolition	195,000	205,196	-	205,196	(10,196)
<b>Completed</b>		<b>40,548,179</b>	<b>28,643,278</b>	<b>694,307</b>	<b>29,337,586</b>	<b>11,210,593</b>
<b>Total Projects</b>		<b>\$391,943,990</b>	<b>\$108,101,484</b>	<b>\$45,873,292</b>	<b>\$153,974,776</b>	<b>\$237,969,214</b>

Footnotes:

GENERAL NOTE: Some of the categorical totals do not appear to add correctly due to rounding of figures

- 1) Pre-Design - Projects that have board approved budgets but do not yet have architects under contract for the design. Projects may have some minor expenditures.
- 2) Design - Projects that are in the design phase or that have been submitted to Division of the State Architect (DSA) for review, or are in the Bid Phase.
- 3) Construction - Projects where a "notice to proceed" to commence construction has been issued to the general contractor.
- 4) Close Out - Projects where substantial completion has been achieved and the construction area has been released to the site for occupancy. Final correction items may be ongoing and the DSA closeout process is being completed. Ongoing payments are still being made to the contractor and other design professionals as part of this phase.
- 5) Completed - Projects that have been closed out with DSA. Some ongoing payments may be made to design professionals as well as some regulatory agencies as fees and assessments are finalized.



McClymonds High School - New Artificial Turf

