#### LEGISLATIVE FILE

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#### OAKLAND UNIFIED SCHOOL DISTRICT

Office of the Board of Education June 27, 2012

To: Board of Education

From: Patricia Williams, Chairperson

Measure "B" Committee

Subject: Presentation: - Presentation to the Board of Education of the Independent

Citizens' Bond Oversight Committee (CBOC) annual report.

#### **ACTION REQUESTED**

Presentation to the Board of Education of the Independent Citizens' Bond Oversight Committee (CBOC) 2010-2011 Annual Report.

#### **BACKGROUND**

In June 2006, Oakland voters passed Measure B, a six-year \$435 million School Facilities Improvement Bond, for Oakland Unified School District to enhance the educational environment for the students and communities of Oakland. In year five of the Bond Program, planning and construction progressed at many sites throughout the District. This annual report summarizes and highlights the work of the Independent Citizens' Bond Oversight Committee (CBOC) and reviews the expenditures in the Measure B School Facilities Improvement Bond for the fiscal year 2010 – 2011.

#### RECOMMENDATION

Presentation to the Board of Education of the Independent Citizens' Bond Oversight Committee (CBOC) 2010-2011 Annual report.

#### **ATTACHMENTS**

2010-2011 Measure B Annual Report



# 2010 - 2011 Measure B Independent Citizens' Bond Oversight Committee Report

www.ousd.k12.ca.us/facilities

**Produced June 2012** 



"It has been exciting to witness the remarkable work done to improve facilities throughout the District. The projects have so many creative and innovative touches. As a member of the Measure B Committee, I have witnessed countless examples of positive, productive use of taxpayer Bond money at schools in all regions of the District. I am proud to live in Oakland and would gladly support funding additional Bond Measures to allow more schools to be updated and improved."

- Renee Swayne, Citizens' Bond Oversight Committee Member, Chairperson



Renovated Classroom Building with New Canopy at Oakland High School

#### **BUILDING FULL SERVICE COMMUNITY SCHOOLS**



### Together, We Are Building

Community Schools, Thriving Students eliminates inequity and provide

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

### **About Measure B**

#### **BOND BACKGROUND**

In June 2006, Oakland voters passed Measure B, a six-year \$435 million School Facilities Improvement Bond, for Oakland Unified School District to enhance the educational environment for the students and communities of Oakland. In year five of the Bond Program, planning and construction progressed at many sites throughout the District.

This annual report summarizes and highlights the work of the Independent Citizens' Bond Oversight Committee (CBOC) and reviews the expenditures in the Measure B School Facilities Improvement Bond for the fiscal year 2010 - 2011.

#### **MEASURE B PROJECTS**

The legal guidelines for spending Measure B funds require that the District restrict expenditures to those projects described in the Bond project list. Since the passage of Measure B, the Board of Education has approved 110 projects with a total value of \$401 million.

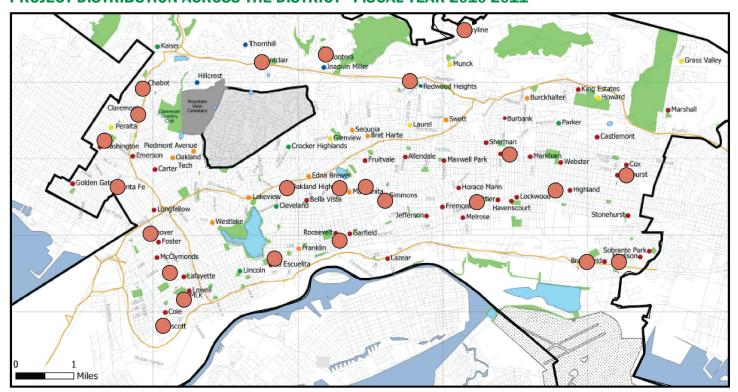
Measure B projects were distributed throughout the District as exhibited in the District map below.

Measure B provided funding for Modernization and New Construction projects that included:

- Classrooms (Including science and computer labs, art and music rooms)
- Student restrooms
- Digital technology
- Libraries
- Multi-purpose rooms
- Cafeterias
- Wellness / health / youth centers
- Child development centers
- Fire alarm / intrusion alarm replacements
- Playground and athletic field improvements

The following pages highlight some projects from the past year.

#### PROJECT DISTRIBUTION ACROSS THE DISTRICT - FISCAL YEAR 2010-2011\*



\* CAMPUS NAMES MAY DIFFER FROM SCHOOL NAMES



### **Building a Better Community**

#### **MODERNIZATION HIGHLIGHTS**

OUSD has an inventory of aging classroom and ancillary buildings. In fact, of the 328 permanent buildings in the District, nearly two in three are over 50 years old. The modernization of these existing facilities is key to improving the educational outcomes for all students.

Montera Middle School modernization project included:

- Renovated classrooms with improved lighting, improved air quality circulation, and new flooring
- Renovated restrooms with an epoxy terrazzo flooring and ceramic tile walls
- · New mechanical system with detection control
- · Campus-wide interior/exterior painting
- · Site wide accessibility
- · Upgrades for fire, life and safety issues
- New fire alarm replacement and data technology networks

Additional scope was added on a site-specific basis. One of the more notable projects was the restored auditorium at Elmhurst Middle School.

#### **NEW CONSTRUCTION HIGHLIGHTS**

OUSD's goal is to provide equitable classroom spaces for all students. To support this goal, the District has undertaken an aggressive campaign to replace old portables with new two story classroom buildings. These buildings will not only contain state of the art classrooms and restrooms, but will also have ancillary and support services such as multi-purpose rooms, health and wellness centers, and counseling areas.



Construction of New Two-Story Classroom Building at Highland Elementary School



**Restored Auditorium at Elmhurst Middle School** 



New Floor for Renovated Multi-Purpose Room at Montera Middle School





Portable Replacement Building at Jefferson Elementary School Left - Rendering, Right - Final Construction



Interim Housing for New Two-Story Classroom Building at
Montclair Elementary School

### **Building a Better Community**

#### PLAYGROUND AND ATHLETIC FIELDS

Measure B funds support the physical buildings and contribute to the outside learning environments through projects such as seating walls, small amphitheaters, extensive landscaping and community gardens. Additionally, the District has replaced many play structures, recognizing that children's physical development is central to their academic development. Highlighted projects in this category include:

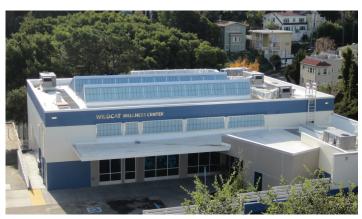
- Chabot Elementary School Landscaping Improvement
- Claremont Middle School Landscape Improvement
- Glenview Elementary School Play Structure
- Martin Luther King Jr. Elementary School Play Structure

#### FIRE ALARM / INTRUSION ALARM

An ongoing safe environment for all students is an OUSD priority. The District continues to improve infrastructure systems such as fire and intrusion alarm systems. Over the past year, the District has upgraded or replaced eight fire and intrusion alarm systems with a value of approximately \$2,000,000.

### CHILD DEVELOPMENT CENTERS/SCHOOL-BASED HEALTH CENTERS

As part of the District's goal to support the whole child, funds from Measure B are used to build spaces to support every aspect of student needs, including child development centers (CDC) and school-based health centers (SBHCs) at some school sites. These facilities provide essential support services to students and the community at-large. Currently, OUSD has developed 31 CDCs and 14 SBHCs using Measure B funds. The adjacent pictures show a few sites where OUSD has developed SBHCs during the past year.



Wildcat Wellness Center SBHC at Oakland High School



Landscaping Improvement at Chabot Elementary School



Planter Boxes at Claremont Middle



New Play Structure and Matting at Glenview Elementary School



New Play Structure and Matting at Martin Luther King Jr. Elementary

"The much needed new Health Care Centers are beautiful examples of the positive things happening in Oakland. Students now have access to free services for their physical and mental health needs--even dental care!"

- Jean Marie Moore, CBOC Member



Interior Rendering of Health Center at Havenscourt Middle School



### **CBOC Roles & Activities**

#### PURPOSE AND DUTIES OF THE CBOC

As required by Education Code Section 15278, the District appointed a Committee of local residents, whose main charge is to inform the public about how the Bond money is being spent. The Committee actively reviews and reports on the expenditure of taxpayer's money for school construction to ensure that bond funds are spent in accordance with the provisions of the bond. The Committee is comprised of up to 11 appointees, including a chairperson, vice chairperson and secretary.

#### **Committee Members for the 2010 / 2011 Fiscal Year**

Chair	Renee Swayne - Senior Citizen Rep.
Vice Chair	Andrea Dawson - Community Member
Secretary	Tracy Amaro - Parent and Business Community Member
Member	Christopher Vernon - Parent and Community Member
Member	Jamie Flaherty-Evans - PTA/School Site Council Member and Parent
Member	Jean Marie Moore - Business Community Member
Member	Odest Logan - Parent/Guardian/Community Member
Member	Patricia Williams - Parent and Community Member

"It has been an amazing experience being part of the Measure B Committee. Touring the modernization projects at OUSD schools and seeing first hand the District's commitment to enhancing our students' learning environment has been awesome. Congratulations, OUSD, for some of the state's most innovative building designs and student friendly community projects."

- Odest Logan, CBOC Member

#### **CBOC ACTIVITIES**

The Committee convened and participated in a number of key activities central to their main charge, such as meeting with the Measure B auditors, preparing the Annual Report, reviewing program expenditures, and visiting 21 project sites to observe construction progress.

Following is a list of Project Site Visits for the 2010/2011 Fiscal Year:

#### July 9, 2010

- Jefferson Elementary School
- Calvin Simmons Middle School

#### August 6, 2010

- McClymonds High School
- Prescott Elementary School

#### October 1, 2010

- Chabot Elementary School
- Montera Middle School

#### November 5, 2010

- Oakland High School
- Urban Promise Middle School

#### **December 3, 2010**

- Roosevelt Middle School
- West Oakland Middle School at Lowell

#### **January 7, 2011**

- Hintil Kuu CA CDC
- Montclair Elementary School

#### February 4, 2011

- United for Success at Calvin Simmons Middle School
- Elmhurst Middle School

#### March 4, 2011

- Reach Academy at Cox
- Madison Middle School

#### April 1, 2011

· La Escuelita Education Center

#### May 6, 2011

- Skyline High School
- Frick Middle School

#### June 3, 2011

- Oakland High School
- Elmhurst Middle School





## Measure B Dollars at Work

#### SUPPORTING THE LOCAL ECONOMY

Since the passage of the local business utilization (LBU) policy by the Board of Education in December 2008, Measure B has stimulated the local economy in the City of Oakland by awarding approximately \$60 million of work to over 152 local contractors and vendors. While the LBU requires a minimum of 20% of all work be done by certified local businesses, the Facilities Department is currently trending around 40% participation. Overarching benefits of the LBU included:

- Increasing the number of Oakland businesses participating in all aspects of District contracting
- Alleviating unemployment and underemployment of Oakland residents
- Increasing participation of under-utilized local businesses in District contracting
- Increasing the circulation of local dollars within the Oakland community and thus stimulating a stronger economic base

An example of the success of the LBU program is the Highland Elementary School New Classroom Building Project. The construction portion of the work is approximately \$13 million; the LBU on this project is 70%, with over \$9 million awarded to local businesses.

#### LEVERAGING MEASURE B FUNDS

OUSD continues to use available opportunities to leverage the \$435 Measure B Bond. For instance, the District, in conjunction with the local community, obtained Urban Forestry and Air Resource Quality grants from the State and Youth/Family Center grants from the City. In addition to State and Local grant funding, the District has taken advantage of subsidized interest rates offered by the Federal government through financial instruments such as Quality School Constructions Bonds (QSCB), Build America Bonds (BAB) and Clean & Renewable Energy Bonds (CREBs). To date, the District has applied for approximately \$63 million, and has received approximately \$30 million in grants and matching funds. The District continues to aggressively explore new opportunities to leverage Measure B funds.

#### **SUSTAINABILITY AND CHPS**

The District has adopted a very robust sustainability initiative which requires that all construction and related building materials conform to sustainable standards. The Bond Program utilizes CHPS (Collaborative For High Performance Schools) in all elements of design and construction of Modernization and New Building projects. As evidence of this commitment, the flagship project of the Measure B Bond Program – the La Escuelita Education Project – earned 107 CHPS points, one of the highest points ever awarded to a project in the State.

"It is good to see the District's commitment to building "greener" schools that are energy efficient and focused on using sustainable resources to achieve a healthy environment for learning and teaching." - Andrea Dawson, CBOC Member

#### **DISTRICT VISION, PRIORITIES & GOAL**

#### **The Vision**

OUSD's vision is to re-establish schools as centers of the community by transforming OUSD into a full-service community school district. In this model, high-quality instruction, health, physical education, nutrition, medical, dental, recreation, housing, employment and language instruction all are provided at the school, which becomes the hub of community activity. The emphasis is on educating and caring for the whole child. Social and human services are not seen as extras or add-ons in these schools. Instead, collaboration centered on the well-being of children and families drives all programs at these schools.



#### **The Priorities**

#### OUSD's priorities are:

- Safe, healthy and supportive schools
- High quality, effective instruction
- College and career readiness

#### **The Goal**

OUSD's goal is to build a Full-Service Community School District that cares for the whole child, eliminates inequity and provides all students with excellent teachers every day.



# Expenditures

Site	Project	Board Approved Project Budget	Prior Years Expenditures (06/07 - 09/10)	Current Year Expendi- tures (10/11)	Cumulative	Variance
Projects in the Pre Desi	gn Phase					
Whittier	New Building	\$3,000,000		\$5,623	\$5,623	\$2,994,
Burbank (Explore)	Small Schools	1,366,600		13,562	13,562	1,353,
Prescott Small Schools	Mod	528,000		55,608	55,608	472,
Edna Brewer	Restroom Renovation	509,250				509,
District-wide	Fire Alarm Maintenance	1,200,000		146,385	146,385	1,053,
Brookfield	Playground	38,184				38,
King Estates Schools	Fire Alarm Replacement	608,900		40,725	40,725	568,
Joaquin Miller	Fire and Intrusion Alarm Replacement	554,938				554,
Glenview Elementary	Fire and Intrusion Alarm Replacement	559,800				559.8
Foster Elementary	Fire Alarm Replacement	428,500				428,5
Burbank Elementary	Fire and Intrusion Alarm Replacement	621,000				621,0
Bella Vista Elementary	Fire and Intrusion Alarm Replacement	621,000			-	621,0
Far West High School	Fire and Intrusion Alarm Replacement	255,000				255,0
Lafayette Elementary	Fire and Intrusion Alarm Replacement	564,800		13,904	13,904	550,
Lakeview CDC	Fire and Intrusion Alarm Replacement	108,000		13,304	15,504	108,0
Lockwood CDC	Fire and Intrusion Alarm Replacement	108,000		1,500	1,500	106,
Santa Fe CDC	Fire and Intrusion Alarm Replacement	108,000		1,300	1,500	108,0
Piedmont Avenue Elem.		667,900			-	667,
	Fire and Intrusion Alarm Replacement	621,000		•		621,
Sherman Elementary	Fire and Intrusion Alarm Replacement			750		
Sobrante Park	Modernization  Vitabon Panauction	1,025,000		752	752	1,024,
Webster Academy	Kitchen Renovation	555,500				555,5
McClymonds Small Schools	Small Schools	2,800,000	79,347	31,147	110,493	2,689,
Fremont Federation	Modernization Phase 3	10,000,000	545,932	43,531	589,462	9,410,5
Lazear Elementary	Modernization	2,300,000	40,224	•	40,224	2,259,
Melrose	Small Schools (Bridges)	700,000	-	-	•	700,0
	Pre Design Phase Project Totals	\$29,849,372	\$665,503	\$352,736	\$1,018,239	\$28,831,
Projects in the Design P	hase					
Washington Small Schools	Small Schools (Sankofa)	\$7,481,661		\$357,784	\$357,784	\$7,123,
ū	Small Schools (Sankofa) CDC Replacement	\$7,481,661 2,707,500	-	\$357,784 54,065	\$357,784 54,065	
Webster Academy	, ,					2,653,
Webster Academy  Jefferson Elementary	CDC Replacement	2,707,500		54,065	54,065	2,653, 70,
Washington Small Schools  Webster Academy  Jefferson Elementary  Yuk Yau  Highland Small Schools	CDC Replacement CDC Fire Alarm Replacement	2,707,500 79,200	:	54,065 8,476	54,065 8,476	2,653, 70, 20,
Webster Academy Jefferson Elementary Yuk Yau	CDC Replacement CDC Fire Alarm Replacement CDC Fire Alarm Replacement	2,707,500 79,200 90,200		54,065 8,476 69,395	54,065 8,476 69,395	2,653, 70, 20, 24,
Webster Academy  Jefferson Elementary  Yuk Yau  Highland Small Schools  Centro Infantil	CDC Replacement CDC Fire Alarm Replacement CDC Fire Alarm Replacement CDC Fire Alarm Replacement	2,707,500 79,200 90,200 83,100		54,065 8,476 69,395 58,768	54,065 8,476 69,395 58,768	2,653, 70, 20, 24, 81,
Webster Academy Jefferson Elementary Yuk Yau Highland Small Schools Centro Infantil Harriet Tubman	CDC Replacement CDC Fire Alarm Replacement CDC Fire Alarm Replacement CDC Fire Alarm Replacement CDC Fire Alarm Replacement	2,707,500 79,200 90,200 83,100 90,200		54,065 8,476 69,395 58,768 8,950	54,065 8,476 69,395 58,768 8,950	2,653, 70, 20, 24, 81, 72,
Webster Academy  Jefferson Elementary  Yuk Yau  Highland Small Schools  Centro Infantil  Harriet Tubman  Golden Gate	CDC Replacement CDC Fire Alarm Replacement	2,707,500 79,200 90,200 83,100 90,200 79,200		54,065 8,476 69,395 58,768 8,950 6,500	54,065 8,476 69,395 58,768 8,950 6,500	\$7,123, 2,653, 70, 20, 24, 81, 72, 88,
Webster Academy Jefferson Elementary Yuk Yau Highland Small Schools	CDC Replacement CDC Fire Alarm Replacement	2,707,500 79,200 90,200 83,100 90,200 79,200 90,200	:	54,065 8,476 69,395 58,768 8,950 6,500	54,065 8,476 69,395 58,768 8,950 6,500 2,099	2,653, 70, 20, 24, 81, 72, 88,
Webster Academy Jefferson Elementary Yuk Yau Highland Small Schools Centro Infantii Harriet Tubman Golden Gate Skyline High School Lockwood	CDC Replacement  CDC Fire Alarm Replacement  Auditorium Fire Alarm Replacement  ES Fire and Intursion alarm Replacement	2,707,500 79,200 90,200 83,100 90,200 79,200 90,200 130,000 542,700		54,065 8,476 69,395 58,768 8,950 6,500 2,099	54,065 8,476 69,395 58,768 8,950 6,500 2,099 - 58,258	2,653, 70, 20, 24, 81, 72, 88, 130, 484,
Webster Academy Jefferson Elementary Yuk Yau Highland Small Schools Centro Infantil Harriet Tubman Golden Gate Skyline High School	CDC Replacement  CDC Fire Alarm Replacement  Auditorium Fire Alarm Replacement	2,707,500 79,200 90,200 83,100 90,200 79,200 90,200 130,000		54,065 8,476 69,395 58,768 8,950 6,500 2,099	54,065 8,476 69,395 58,768 8,950 6,500 2,099	2,653, 70, 20, 24, 81, 72, 88,



# Expenditures

Site	Project	Board Approved Project Budget	Prior Years Expenditures (06/07 - 09/10)	Current Year Expendi- tures (10/11)	Cumulative	Variance
Cesar Chavez Elementary	School Fire Alarm Replacement	\$546,900	-	\$50,774	\$ 50,774	\$496,126
Piedmont	CDC Fire Alarm Replacement	83,100		6,158	6,158	76,942
Washington Small Schools	CDC Fire Alarm Replacement	95,700	-	33	33	95,667
Downtown	New Educational Complex	38,000,000			-	38,000,000
Life Academy	Life Academy Renovation Seismic/Reno	16,000,000	178,282	1,098,153	1,276,436	14,723,564
Arroyo Viejo	CDC Replacement	3,064,500	311,454	48,362	359,816	2,704,684
Havenscourt Middle	Classroom and Cafeteria	12,234,000	470,925	1,008,941	1,479,866	10,754,134
Havenscourt Middle	Health Center	1,376,080	58,319	394,032	452,351	923,729
Hintil	CDC Replacement	3,275,200	73,265	245,187	318,452	2,956,749
Laurel Elementary	CDC Replacement	3,889,800	195,557	104,717	300,274	3,589,526
Montclair	New Classroom	17,124,286	1,106,191	1,068,678	2,174,870	14,949,416
Stonehurst	CDC Replacement	3,963,824	103,456	322,705	426,161	3,537,663
Skyline High School	Skyline HS Wellness Center	750,000	30,761	174,452	205,213	544,787
Frick	Frick Wellness Center	750,000	24,146	159,543	183,689	566,311
Elmhurst Middle School	Elmhurst wellness Center	750,000	21,510	164,298	185,808	564,192
Highland Small Schools	Portable	16,733,142	1,182,155	1,943,595	3,125,750	13,607,392
Downtown Ed. Complex	Downtown Ed. Com. Wellness Center	-				
Downtown Ed. Complex	Downtown Education Complex	1,500,000	135,030	4,834,076	4,969,106	(3,469,106)
Lowell Middle	Modernization	14,410,000	956,934	913,438	1,870,372	12,539,628
	Health Center	1,193,660	46,294	26,990	73,284	1,120,376
Lowell Middle			00 700	925	23,687	136,313
Laurel Elementary	Fire Alarm Replacement	160,000	22,762	020		
	Fire Alarm Replacement  Modernization	160,000 3,950,064	2,008,521	81,014	2,089,535	1,860,529
Laurel Elementary	·					1,860,529
Laurel Elementary	·					1,860,529 <b>\$131,441,070</b>
Laurel Elementary Manzanita Elementary	Modernization  Design Phase Project Totals	3,950,064	2,008,521	81,014	2,089,535	
Laurel Elementary	Modernization  Design Phase Project Totals	3,950,064	2,008,521	81,014	2,089,535	
Laurel Elementary Manzanita Elementary	Modernization  Design Phase Project Totals	3,950,064	2,008,521	81,014	2,089,535	\$131,441,070
Laurel Elementary  Manzanita Elementary  Projects in the Construct	Design Phase Project Totals	3,950,064 \$152,363,967	2,008,521 \$6,925,561	\$1,014 \$13,997,335	2,089,535 \$20,922,897	\$131,441,070 \$1,033,409
Laurel Elementary  Manzanita Elementary  Projects in the Construct  Chabot Elementary	Design Phase Project Totals  ttion Phase  Portable	3,950,064 \$152,363,967 \$18,900,000	\$6,925,561 \$16,763,554	\$1,014 \$13,997,335 \$1,103,037	2,089,535 \$20,922,897 \$17,866,591	\$131,441,070 \$1,033,409 1,097,969
Laurel Elementary  Manzanita Elementary  Projects in the Construc  Chabot Elementary  Urban Promise Academy	Design Phase Project Totals  tion Phase  Portable  Multi-purpose Gym	\$152,363,967 \$152,363,967 \$18,900,000 7,089,364	\$6,925,561 \$16,763,554 4,072,603	\$13,997,335 \$11,103,037 1,918,792	\$20,922,897 \$17,866,591 5,991,395	\$131,441,070 \$1,033,409 1,097,969 405,249
Laurel Elementary  Manzanita Elementary  Projects in the Construct  Chabot Elementary  Urban Promise Academy  Calvin Simmons	Design Phase Project Totals  ction Phase  Portable  Multi-purpose Gym  Health Center	\$152,363,967 \$152,363,967 \$18,900,000 7,089,364 1,327,038	\$6,925,561 \$16,763,554 4,072,603 188,835	\$13,997,335 \$1,103,037 1,918,792 732,953	\$20,922,897 \$17,866,591 5,991,395 921,789	\$131,441,070 \$1,033,409 1,097,969 405,249 347,437
Laurel Elementary  Manzanita Elementary  Projects in the Construct  Chabot Elementary  Urban Promise Academy  Calvin Simmons  Roosevelt Middle School	Design Phase Project Totals  etion Phase  Portable  Multi-purpose Gym  Health Center  Health Center	\$152,363,967 \$18,900,000 7,089,364 1,327,038 1,298,924	\$6,925,561 \$16,763,554 4,072,603 188,835 114,274	\$1,014 \$13,997,335 \$1,103,037 1,918,792 732,953 837,213	\$20,922,897 \$17,866,591 5,991,395 921,789 951,487	\$131,441,070 \$1,033,409 1,097,969 405,249 347,437 621,772
Laurel Elementary  Manzanita Elementary  Projects in the Construct  Chabot Elementary  Urban Promise Academy  Calvin Simmons  Roosevelt Middle School  District-wide	Modernization  Design Phase Project Totals  Etion Phase  Portable  Multi-purpose Gym  Health Center  Health Center  Playground Inspections & Repair	\$152,363,967 \$18,900,000 7,089,364 1,327,038 1,298,924 1,600,000	\$6,925,561 \$16,763,554 4,072,603 188,835 114,274 95,557	\$1,014 \$13,997,335 \$1,103,037 1,918,792 732,953 837,213 882,672	\$20,922,897 \$20,922,897 \$17,866,591 5,991,395 921,789 951,487 978,228	\$131,441,070 \$1,033,409 1,097,969 405,249 347,437 621,772 2,788,176
Laurel Elementary  Manzanita Elementary  Projects in the Construct  Chabot Elementary  Urban Promise Academy  Calvin Simmons  Roosevelt Middle School  District-wide  Elmhurst Middle	Modernization  Design Phase Project Totals  Etion Phase  Portable  Multi-purpose Gym  Health Center  Health Center  Playground Inspections & Repair  Modernization/ Small Schools	\$152,363,967 \$18,900,000 7,089,364 1,327,038 1,298,924 1,600,000 7,300,000	\$6,925,561 \$16,763,554 4,072,603 188,835 114,274 95,557 1,443,242	\$13,997,335 \$1,103,037 1,918,792 732,953 837,213 882,672 3,068,582	\$20,922,897 \$17,866,591 5,991,395 921,789 951,487 978,228 4,511,824	\$131,441,070 \$1,033,409 1,097,969 405,249 347,437 621,772 2,788,176 181,878
Laurel Elementary  Manzanita Elementary  Projects in the Construct  Chabot Elementary  Urban Promise Academy  Calvin Simmons  Roosevelt Middle School  District-wide  Elmhurst Middle  Madison Middle	Design Phase Project Totals  Portable Multi-purpose Gym Health Center Health Center Playground Inspections & Repair Modernization/ Small Schools Health Center	\$152,363,967 \$18,900,000 7,089,364 1,327,038 1,298,924 1,600,000 7,300,000 1,264,150	\$6,925,561 \$16,763,554 4,072,603 188,835 114,274 95,557 1,443,242 69,825	\$1,014 \$13,997,335 \$1,103,037 1,918,792 732,953 837,213 882,672 3,068,582 1,012,447	\$20,922,897 \$17,866,591 5,991,395 921,789 951,487 978,228 4,511,824 1,082,272	\$131,441,070 \$1,033,409 1,097,969 405,249 347,437 621,772 2,788,176 181,878 1,003,318
Laurel Elementary  Manzanita Elementary  Projects in the Construct  Chabot Elementary  Urban Promise Academy  Calvin Simmons  Roosevelt Middle School  District-wide  Elmhurst Middle  Madison Middle  Havenscourt Middle  Montera	Modernization  Design Phase Project Totals  Portable Multi-purpose Gym Health Center Health Center Playground Inspections & Repair Modernization/ Small Schools Health Center Modernization Modernization	\$152,363,967 \$18,900,000 7,089,364 1,327,038 1,298,924 1,600,000 7,300,000 1,264,150 3,451,708	2,008,521 \$6,925,561 \$16,763,554 4,072,603 188,835 114,274 95,557 1,443,242 69,825 2,237,380 544,500	\$1,014 \$13,997,335 \$1,103,037 1,918,792 732,953 837,213 882,672 3,068,582 1,012,447 211,011 6,626,408	\$20,922,897 \$20,922,897 \$17,866,591 5,991,395 921,789 951,487 978,228 4,511,824 1,082,272 2,448,390 7,170,907	\$1,033,409 1,097,969 405,249 347,437 621,772 2,788,176 181,878 1,003,318 2,764,093
Laurel Elementary  Manzanita Elementary  Projects in the Construct  Chabot Elementary  Urban Promise Academy  Calvin Simmons  Roosevelt Middle School  District-wide  Elmhurst Middle  Madison Middle  Havenscourt Middle  Montera  Montera	Modernization  Design Phase Project Totals  Portable Multi-purpose Gym Health Center Health Center Playground Inspections & Repair Modernization/ Small Schools Health Center Modernization Modernization Fire Alarm	\$152,363,967 \$18,900,000 7,089,364 1,327,038 1,298,924 1,600,000 7,300,000 1,264,150 3,451,708 9,935,000 525,000	2,008,521 \$6,925,561 \$16,763,554 4,072,603 188,835 114,274 95,557 1,443,242 69,825 2,237,380 544,500 31,210	\$1,014 \$13,997,335 \$1,103,037 1,918,792 732,953 837,213 882,672 3,068,582 1,012,447 211,011 6,626,408 653,258	\$20,922,897 \$20,922,897 \$17,866,591 5,991,395 921,789 951,487 978,228 4,511,824 1,082,272 2,448,390 7,170,907 684,468	\$131,441,070 \$1,033,409 1,097,969 405,249 347,437 621,772 2,788,176 181,878 1,003,318 2,764,093 (159,468)
Laurel Elementary  Manzanita Elementary  Projects in the Construct  Chabot Elementary  Urban Promise Academy  Calvin Simmons  Roosevelt Middle School  District-wide  Elmhurst Middle  Madison Middle  Havenscourt Middle  Montera  Montera  Prescott Small Schools	Design Phase Project Totals  Portable Multi-purpose Gym Health Center Health Center Playground Inspections & Repair Modernization/ Small Schools Health Center Modernization Small Schools (PLACE)	\$152,363,967 \$18,900,000 7,089,364 1,327,038 1,298,924 1,600,000 7,300,000 1,264,150 3,451,708 9,935,000 525,000 3,625,000	2,008,521 \$6,925,561 \$16,763,554 4,072,603 188,835 114,274 95,557 1,443,242 69,825 2,237,380 544,500 31,210 335,884	\$1,014 \$13,997,335 \$1,103,037 1,918,792 732,953 837,213 882,672 3,068,582 1,012,447 211,011 6,626,408 653,258 3,043,454	\$17,866,591 \$17,866,591 5,991,395 921,789 951,487 978,228 4,511,824 1,082,272 2,448,390 7,170,907 684,468 3,379,339	\$131,441,070 \$1,033,409 1,097,969 405,249 347,437 621,772 2,788,176 181,878 1,003,318 2,764,093 (159,468) 245,661
Laurel Elementary  Manzanita Elementary  Projects in the Construct  Chabot Elementary  Urban Promise Academy  Calvin Simmons  Roosevelt Middle School  District-wide  Elmhurst Middle  Madison Middle  Havenscourt Middle  Montera  Montera  Prescott Small Schools  Jefferson Elementary	Design Phase Project Totals  Portable Multi-purpose Gym Health Center Health Center Playground Inspections & Repair Modernization/ Small Schools Health Center Modernization Fire Alarm Small Schools (PLACE) Portable	3,950,064 \$152,363,967 \$18,900,000 7,089,364 1,327,038 1,298,924 1,600,000 7,300,000 1,264,150 3,451,708 9,935,000 525,000 3,625,000 18,200,000	2,008,521 \$6,925,561 \$16,763,554 4,072,603 188,835 114,274 95,557 1,443,242 69,825 2,237,380 544,500 31,210 335,884 3,896,877	\$1,014 \$13,997,335 \$1,103,037 1,918,792 732,953 837,213 882,672 3,068,582 1,012,447 211,011 6,626,408 653,258 3,043,454 8,130,161	2,089,535 \$20,922,897 \$17,866,591 5,991,395 921,789 951,487 978,228 4,511,824 1,082,272 2,448,390 7,170,907 684,468 3,379,339 12,027,038	\$131,441,070 \$1,033,409 1,097,969 405,249 347,437 621,772 2,788,176 181,878 1,003,318 2,764,093 (159,468) 245,661 6,172,962
Laurel Elementary  Manzanita Elementary  Projects in the Construct  Chabot Elementary  Urban Promise Academy  Calvin Simmons  Roosevelt Middle School  District-wide  Elmhurst Middle  Madison Middle  Havenscourt Middle  Montera  Montera  Prescott Small Schools  Jefferson Elementary  Stonehurst	Portable Multi-purpose Gym Health Center Playground Inspections & Repair Modernization/ Small Schools Health Center Modernization Modernization Fire Alarm Small Schools (PLACE) Portable Restroom Renovation	3,950,064 \$152,363,967 \$18,900,000 7,089,364 1,327,038 1,298,924 1,600,000 7,300,000 1,264,150 3,451,708 9,935,000 525,000 3,625,000 18,200,000 983,501	2,008,521 \$6,925,561 \$16,763,554 4,072,603 188,835 114,274 95,557 1,443,242 69,825 2,237,380 544,500 31,210 335,884 3,896,877 75,972	\$1,014 \$13,997,335 \$1,103,037 1,918,792 732,953 837,213 882,672 3,068,582 1,012,447 211,011 6,626,408 653,258 3,043,454 8,130,161 489,742	2,089,535 \$20,922,897 \$17,866,591 5,991,395 921,789 951,487 978,228 4,511,824 1,082,272 2,448,390 7,170,907 684,468 3,379,339 12,027,038 565,714	\$131,441,070 \$1,033,409 1,097,969 405,249 347,437 621,772 2,788,176 181,878 1,003,318 2,764,093 (159,468) 245,661 6,172,962 417,787
Laurel Elementary  Manzanita Elementary  Projects in the Construct  Chabot Elementary  Urban Promise Academy  Calvin Simmons  Roosevelt Middle School  District-wide  Elmhurst Middle  Madison Middle  Havenscourt Middle  Montera  Montera  Prescott Small Schools  Jefferson Elementary  Stonehurst  Oakland High	Portable Multi-purpose Gym Health Center Playground Inspections & Repair Modernization/Small Schools Health Center Modernization Modernization Fire Alarm Small Schools (PLACE) Portable Restroom Renovation Health Center	3,950,064 \$152,363,967 \$18,900,000 7,089,364 1,327,038 1,298,924 1,600,000 7,300,000 1,264,150 3,451,708 9,935,000 525,000 3,625,000 18,200,000 983,501 2,751,625	2,008,521  \$6,925,561  \$16,763,554 4,072,603 188,835 114,274 95,557 1,443,242 69,825 2,237,380 544,500 31,210 335,884 3,896,877 75,972 388,326	\$1,014 \$13,997,335 \$1,103,037 1,918,792 732,953 837,213 882,672 3,068,582 1,012,447 211,011 6,626,408 653,258 3,043,454 8,130,161 489,742 1,651,084	2,089,535 \$20,922,897 \$17,866,591 5,991,395 921,789 951,487 978,228 4,511,824 1,082,272 2,448,390 7,170,907 684,468 3,379,339 12,027,038 565,714 2,039,410	\$1,033,409 1,097,969 405,249 347,437 621,772 2,788,176 181,878 1,003,318 2,764,093 (159,468) 245,661 6,172,962 417,787 712,215
Laurel Elementary  Manzanita Elementary  Projects in the Construct  Chabot Elementary  Urban Promise Academy  Calvin Simmons  Roosevelt Middle School  District-wide  Elmhurst Middle  Madison Middle  Havenscourt Middle  Montera  Montera  Prescott Small Schools  Jefferson Elementary  Stonehurst  Oakland High  Oakland High	Portable Multi-purpose Gym Health Center Health Center Modernization Modernization Modernization Fire Alarm Small Schools (PLACE) Portable Restroom Renovation Health Center Modernization	3,950,064 \$152,363,967 \$18,900,000 7,089,364 1,327,038 1,298,924 1,600,000 7,300,000 1,264,150 3,451,708 9,935,000 525,000 3,625,000 18,200,000 983,501 2,751,625 25,197,597	2,008,521  \$6,925,561  \$16,763,554  4,072,603  188,835  114,274  95,557  1,443,242  69,825  2,237,380  544,500  31,210  335,884  3,896,877  75,972  388,326  15,385,292	\$1,014 \$13,997,335 \$1,103,037 1,918,792 732,953 837,213 882,672 3,068,582 1,012,447 211,011 6,626,408 653,258 3,043,454 8,130,161 489,742 1,651,084 8,630,813	2,089,535 \$20,922,897 \$17,866,591 5,991,395 921,789 951,487 978,228 4,511,824 1,082,272 2,448,390 7,170,907 684,468 3,379,339 12,027,038 565,714 2,039,410 24,016,105	\$1,033,409 1,097,969 405,249 347,437 621,772 2,788,176 181,878 1,003,318 2,764,093 (159,468) 245,661 6,172,962 417,787 712,215 1,181,492
Laurel Elementary  Manzanita Elementary  Projects in the Construct  Chabot Elementary  Urban Promise Academy  Calvin Simmons  Roosevelt Middle School  District-wide  Elmhurst Middle  Madison Middle  Havenscourt Middle  Montera  Montera  Prescott Small Schools  Jefferson Elementary  Stonehurst  Oakland High  Oakland High  Cox Elementary	Portable Multi-purpose Gym Health Center Health Center Playground Inspections & Repair Modernization/ Small Schools Health Center Modernization Fire Alarm Small Schools (PLACE) Portable Restroom Renovation Health Center Modernization Additional Classroom	3,950,064 \$152,363,967 \$18,900,000 7,089,364 1,327,038 1,298,924 1,600,000 7,300,000 1,264,150 3,451,708 9,935,000 525,000 18,200,000 983,501 2,751,625 25,197,597 16,745,000	2,008,521  \$6,925,561  \$16,763,554  4,072,603  188,835  114,274  95,557  1,443,242  69,825  2,237,380  544,500  31,210  335,884  3,896,877  75,972  388,326  15,385,292  12,962,055	\$1,014 \$13,997,335 \$1,103,037 1,918,792 732,953 837,213 882,672 3,068,582 1,012,447 211,011 6,626,408 653,258 3,043,454 8,130,161 489,742 1,651,084 8,630,813 3,237,401	2,089,535 \$20,922,897 \$17,866,591 5,991,395 921,789 951,487 978,228 4,511,824 1,082,272 2,448,390 7,170,907 684,468 3,379,339 12,027,038 565,714 2,039,410 24,016,105 16,199,456	\$131,441,070 \$1,033,409 1,097,969 405,249 347,437 621,772 2,788,176 181,878 1,003,318 2,764,093 (159,468) 245,661 6,172,962 417,787 712,215 1,181,492 545,544
Laurel Elementary  Manzanita Elementary  Projects in the Construct  Chabot Elementary  Urban Promise Academy  Calvin Simmons  Roosevelt Middle School  District-wide  Elmhurst Middle  Madison Middle  Havenscourt Middle  Montera  Montera  Prescott Small Schools  Jefferson Elementary  Stonehurst  Oakland High  Oakland High	Portable Multi-purpose Gym Health Center Health Center Modernization Modernization Modernization Fire Alarm Small Schools (PLACE) Portable Restroom Renovation Health Center Modernization	3,950,064 \$152,363,967 \$18,900,000 7,089,364 1,327,038 1,298,924 1,600,000 7,300,000 1,264,150 3,451,708 9,935,000 525,000 3,625,000 18,200,000 983,501 2,751,625 25,197,597	2,008,521  \$6,925,561  \$16,763,554  4,072,603  188,835  114,274  95,557  1,443,242  69,825  2,237,380  544,500  31,210  335,884  3,896,877  75,972  388,326  15,385,292	\$1,014 \$13,997,335 \$1,103,037 1,918,792 732,953 837,213 882,672 3,068,582 1,012,447 211,011 6,626,408 653,258 3,043,454 8,130,161 489,742 1,651,084 8,630,813	2,089,535 \$20,922,897 \$17,866,591 5,991,395 921,789 951,487 978,228 4,511,824 1,082,272 2,448,390 7,170,907 684,468 3,379,339 12,027,038 565,714 2,039,410 24,016,105	



# Expenditures

Site	Project	Board Approved Project Budget	Prior Years Expenditures (06/07 - 09/10)	Current Year Expendi- tures (10/11)	Cumulative	Variance
Projects in the Close Out	Phase					
Oakland High	Williams Settlement	\$18,062,137	\$18,062,137	-	\$18,062,137	
Madison Middle	Modernization	8,798,084	7,351,548	84,670	7,436,218	1,361,86
Ralph Bunche	Modernization	4,200,000	1,684,507	54,612	1,739,120	2,460,88
Highland Small Schools	Fire Alarm Upgrade	260,000	253,829		253,829	6,1
Manzanita Elementary	Small Schools	150,000	-	-	-	150,00
Lincoln Elementary	Portable Replacement	8,886,225	7,967,437	97,855	8,065,292	820,9
Stonehurst	Small Schools (Esperanza)	480,526	411,752	49,969	461,721	18,8
Calvin Simmons	Modernization/Small Schools	4,232,059	3,879,106	2,354	3,881,460	350,5
Whittier	Modernization	3,994,240	3,690,314	30,365	3,720,679	273,50
	Close Out Phase Project Totals	\$49,063,271	\$43,300,631	\$319,825	\$43,620,456	\$5,442,81
Completed Projects						
Arts Far West	Intercom/PA/Clock Repairs	\$206,315	\$126,194		\$126,194	\$80,12
Oakland Tech	Oakland Tech Modernization	3,327,843	3,257,912		3,257,912	69,9
McClymonds	McClymonds intercom/PA/clock Repairs	287,321	227,410		227,410	59,9
Castlemont	Auditorium Renovations	3,570,000	3,554,945	5,626	3,560,570	9,4
Cole Middle School	Renovations	979,839	979,839		979,839	
Cole Middle School	Health Center	71,950	71,950		71,950	
Peralta	Modernization	1,430,586	1,361,160	1,050	1,362,210	68,3
Hoover	Modernization	4,504,462	4,124,453	2,684	4,127,137	377,3
Cleveland Elementary	Modernization Phase 2	3,803,574	3,801,124	2,450	3,803,574	
Bret Harte Middle	Modernization	5,221,468	4,771,223	7,564	4,778,786	442,6
Emerson Elementary	Modernization	3,900,000	3,899,267	2,046	3,901,313	(1,3:
Carter Middle	Modernization	3,008,904	2,951,025	-	2,951,025	57,8
Sequoia	Sequoia Portable Installation	80,000	73,581	-	73,581	6,4
Laurel Elementary	Modernization	1,963,723	1,890,003	1,025	1,891,029	72,6
Redwood Heights Portable	Portable addition	157,500	142,787		142,787	14,7
Acorn/Woodland Library		500,000	497,065		497,065	2,9
Westlake	Modernization	5,757,641	5,496,892	2,585	5,499,477	258,1
Cole Middle School	Intercom/PA/Clock Repairs	146,351	146,351		146,351	
Highland Small Schools	Interim Housing	215,924	215,924		215,924	
Highland Small Schools	Modernization/ Small Schools	1,300,000	864,816	-	864,816	435,1
Joaquin Miller	ADA Accessibility	11,460	-	-	-	11,4
King Estates Small Schools	Small Schools	3,500,000	704,311	-	704,311	2,795,6
Lafayette	Intercom/PA/Clock Repairs	75,877	66,506	-	66,506	9,3
Webster Academy	Portable Demolition	195,000	205,196		205,196	(10,19
	Completed Project Totals	\$44,215,738	\$39,429,931	\$25,030	\$39,454,961	\$4,760,77

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

#### FOOTNOTES:

- 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.
- 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.

  Construction Projects where a "notice to proceed" to commence construction has been issued to the general contractor. 2.
- 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 close-
- out process is being completed. Ongoing payments are still being made to the contractor and other design professionals as part of this phase.

  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.



### **Audit Review and Findings**

#### **ANNUAL EXPENDITURE REVIEW**

Of all of the activities undertaken by the CBOC, its primary duty is to review and ensure that the Measure B funds are spent in accordance with the Bond language. The preceding is a chart that reflects a summary of project expenditures for the Fiscal Year Ended June 30, 2011. The report is organized to reflect the life of each project commencing with the Pre-Design Phase and concluding with the Completed Phase. In addition, \$7,675,530 was expended on program support items such as staff and consultants in direct support of the bond program. The combined project and program expenditures for the 2010/2011 Fiscal Year totaled \$64,716,229, and the cumulative expenditures for the first five years of the bond program totaled \$218,691,004 through June 30, 2011.

#### **FISCAL AND PERFORMANCE AUDIT**

As required by Measure B, each year a fiscal and performance audit of Measure B expenditures is conducted. Yano Accountancy Corporation conducted the 2010/2011 audit and concluded that OUSD complied in all material respects with the Measure B requirements to expend bond proceeds only on the school facilities projects specified in the Measure B legislation.

#### STATEMENT OF COMPLIANCE

This 2010/2011 Measure B Annual Report is submitted to the Board of Education by the Committee, in accordance with Education Code section 15278 (b). The Committee advises that, to the best of its knowledge based on available information provided by the District, OUSD is in full compliance with the requirements of Article XIIIA, Section 1 (b) (3) of the California Constitution.

### **Investing for Tomorrow**

#### **LOOKING AHEAD (FISCAL YEAR 2011/2012)**

As we conclude this 2010/2011 annual report, we look forward to the 2011/2012 year. Here are some of next year's scheduled milestones in design and construction:

- Completion of the first phase of the La Escuelita Education Project, including the new La Escuelita Elementary School
- Completion of Highland Elementary New Building Project
- Completion of Lowell Middle Modernization Project
- Construction of Montclair Elementary New Building Project
- Construction of Havenscourt Middle New Building Project
- Construction of Arroyo Viejo ES CDC
- Construction of Stonehurst ES CDC
- Construction of Laurel ES CDC
- Construction of Madison Middle New Football Field Project
- Numerous Fire/Intrusion Alarm Projects

"The OUSD facilities staff regularly impress me with their creativity and attention to detail in designing and implementing improvements at school sites. They do an excellent job, addressing the needs of each unique site and delivering safe and modern facilities that support our students' development and success."

- Patricia Williams, CBOC Member

