

LEGISLATIVE FILE

File ID No. 11-0143

Introduction Date 1-25-2011

Enactment No. _____

Enactment Date _____

By _____

OAKLAND UNIFIED SCHOOL DISTRICT
Office of the Board of Education
1-25-2011

To: Board of Education

From: Tony Smith, Ed.D., Superintendent
Timothy E. White, Assistant Superintendent of Facilities Planning &
Management, Buildings & Grounds and Custodial Services

Subject: **Measure 'B' Independent Citizens' School Facilities Bond Oversight
Committee 2009/2010**

ACTION REQUESTED

Approval by the Committee of the Measure "B" Independent Citizens' School Facilities Bond Oversight Committee 2009/2010 Annual Report and authorization of the Chair and/or other representative of Committee to present same to the Board of Education and the public.

BACKGROUND

In keeping with the Oakland Unified School District's commitment to the improvement and development of its K-12 facilities, the District has embarked on a groundbreaking plan to create a district-wide modernization of the District's schools.

STRATEGIC ALIGNMENT

Among the key purposes of the District's Facilities Master Plan is to provide an academic environment for the Oakland community that will give every student, educator, and community member using our facilities the best possible opportunity for learning.

Through implementation of the Facilities Master Plan, the District intends to improve the District's facilities in terms of structural integrity, safety, reliability of operating (mechanical) systems, access to modern resources, number and type of appropriate laboratories and specialized instruction rooms, opportunities for physical education, and attractiveness, such that the Oakland Public Schools are second to none. Operation of the District schools under the planned approach is intended to ensure safety, cleanliness, and orderliness for all individuals participating in the learning process.

The basic facility needs of students such as proper lighting, functional roofs, noise control and well maintained buildings, not only convey the message that we value our students and teachers but may foster a sense of school pride and community ownership which may improve attitudes towards learning. The implementation of the Facilities Master Plan is our first step in that direction.

FISCAL IMPACT

The funding source for this project budget is the General Obligation Bond-Measure B.

RECOMMENDATION

Approval by the Committee of the Measure “B” Independent Citizens’ School Facilities Bond Oversight Committee 2009/2010 Annual Report and authorization of the Chair and/or other representative of Committee to present same to the Board of Education and the public.

ATTACHMENTS

Division of Facilities, Planning and Management – Measure B Citizens’ Bond Oversight Committee – Annual Report 2009/2010.



OAKLAND UNIFIED
SCHOOL DISTRICT

Community Schools • Quality Education

2008-2009 Measure B Independent Citizen's Bond Oversight Committee Annual Report

www.oakland.k12.ca.us/utilities

Produced August 2009



Foundations for Change and Renewal

*New two-story classroom foundation
for Crabot Elementary School*

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 2008-2009.

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 libraries, media centers, science labs, computer labs,

art and music classrooms, vocational shops and laboratories. 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.

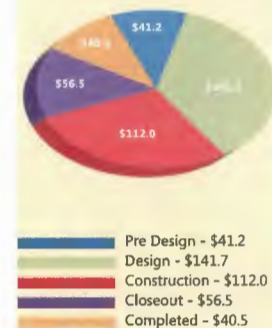
From the inception of Measure B through fiscal year 2008-2009, the Board of Education has approved 93 projects with a combined value of \$391.9 million. As stipulated by the bond, these projects meet the categorical requirements for use of funds at various elementary, middle and high schools.

As of June 2009, 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 programs. As of June 2009, the District had identified potential matching funds of about \$55 million.

Oakland Unified School District
Measure B
Project Budgets by Phase
As of June 2009 (\$391.9 million)



Building for the
Future of our
Children in the
Oakland Unified
School District

New multipurpose building at
Chabot Elementary School



New Castlemont High School Performing Arts Center



Castlemont High School Auditorium BEFORE



Castlemont High School Auditorium AFTER

CBOC Activities

Audit Review and Findings



Rendering of Urban Promise Academy (East)



Rendering of Urban Promise Academy (South)

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 2008-2009 Fiscal Year, the CBOC continued to engage in a number of important activities, including the review of expenditures

CBOC Site Visits 2008 - 2009

August 8, 2008

Oakland High School
Laurel Elementary School
Laurel Child Development Center

September 12, 2008

McClymonds High School
Lafayette Elementary School
Prescott Elementary School

October 10, 2008

Skyline High School
Himali Kau Ca Child Development Center
Monterey Middle School

November 14, 2008

Lincoln Elementary School
Westlake Middle School
Roosevelt Middle School

December 12, 2008

Arroyo Viejo Child Development Center
Parker Child Development Center
Castlemont High School

January 9, 2009

Downtown Project
La Escuelita, Met West, Child Development Centers

February 13, 2009

Laurel Elementary School
Cleveland Elementary School
Oakland High School

March 13, 2009

Madison Middle School
Stonehurst Elementary School
Stonehurst Child Development Center

April 10, 2009

Chabot Elementary School
Montclair Elementary School

May 8, 2009

Cox Elementary School
Elmhurst Middle School
Highland Elementary School

June 12, 2009

Urban Promise Academy
Luzear Elementary School
Manzanita Elementary School

and conducting site visits to observe construction progress. The committee is comprised of up to 11 individuals, including a chairperson, vice chairperson, secretary and eight members. It conducted visits to various school sites throughout the District and encouraged community members to participate in the visits as well. Meeting dates in 2008 included: August 8 and 19, September 16,

and October 21.

The current annual report was prepared under the auspices of the 2009-2010 CBOC, since the terms of 2008-2009 CBOC members had expired prior to the preparation and completion of this report. The 2009-2010 membership of the Committee is listed below along with the CBOC's membership for 2008-2009.

COMMITTEE MEMBERS 2008 / 2009

Chair	Dr. John Cooke, Community Member	District 7
Vice Chair	Jody London, PTA/School Site Council Member and Parent	District 1
Secretary	Parker Thomas, Business Community Member	District 5
Member	Joseph Debro, Business Community Member and Taxpayer Representative	District 7
Member	Oscar Wright, Community Member	District 3
Member	Lellie Hamlett, Senior Citizen Representative	District 1
Member	Darryl/William Ovid, PTA/School Site Council Member and Parent	District 7
Member	David Won, PTA/School Site Council Member and Parent	District 4

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	Christopher Vernon, Parent and Community Member	District 3
Member	Patricia Williams, Parent and Community Member	District 1



Bret Harte Hallway



Classroom Lab, Madison Middle School



Madison Middle School Exterior



Madison Middle School Gymnasium

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 2008-2009 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 sub-total of expenditures for each phase. The expenditures for the 2008-2009 fiscal year totaled \$63.98 million, and the cumulative expenditures for the program were \$108.1 million through June 30th, 2009.

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 2008-2009 audit, conducted by Thompson, Cobb, Bazilio & Associates, reported no material exceptions regarding the nature and validity of expenditures.

Summary

The Citizens' Bond Oversight Committee engaged in many important activities throughout fiscal year 2008-2009 ranging from project visits to review of program expenditures. The CBOC conducted 11 project tours, which included visits to over 30 schools. 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. Many projects are already completed including: Westlake Middle, Bret Harte Middle and Emerson Elementary schools. 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	Budget	Prior Year Expenditures (06/07-07/08)	Current Year Expenditures (08-09)	Cumulative Expenditures	Variance
PRE-DESIGN						
Life Academy	Renovation Seismic	\$16,000,000	\$-	-	\$-	\$16,000,000
Parker	CDC Replacement	541,500	-	-	-	541,500
Burkbank (Explore)	Small Schools	1,366,600	-	-	-	1,366,600
McClymonds Small Schools	Small Schools	2,800,000	23,908	55,439	79,347	2,720,653
Fremont Federation	Modernization Phase 3	10,000,000	58,357	487,575	545,932	9,454,068
Lazear Elementary	Modernization	2,300,000	16,567	19,158	35,724	2,264,276
Melrose	Small Schools (Bridges)	700,000	-	-	-	700,000
Washington Small Schools	Small Schools (Sankofa)	7,481,661	-	-	-	7,481,661
Pre-Design Total [1]		41,189,761	98,831	562,172	661,003	40,528,758
DESIGN						
Calvin Simmons	Health Center	1,327,038	2,343	62,615	64,958	1,262,080
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	2,343	87,387	89,730	1,209,194
Arroyo Viejo	CDC Replacement	3,064,500	-	-	-	3,064,500
Havenscourt Middle	Classroom and Cafeteria	12,234,000	-	-	-	12,234,000
Havenscourt Middle	Health Center	1,376,080	2,343	4,320	6,663	1,369,417
Hintil Kuu Ca	CDC Replacement	3,275,200	-	-	-	3,275,200
Laurel Elementary	CDC Replacement	3,889,800	-	-	-	3,889,800
Montclair	New Classroom	17,124,286	-	36,274	36,274	17,088,012
Stonehurst	CDC Replacement	3,963,824	-	-	-	3,963,824
Skyline High School	Skyline HS Wellness Center	750,000	-	-	-	750,000
Frick Middle School	Wellness Center	750,000	-	-	-	750,000
Elmhurst Middle School	Wellness Center	750,000	-	-	-	750,000
Highland Small Schools	Portable	16,733,142	140,258	43,050	183,308	16,549,834
Downtown Ed. Complex	Wellness Center	750,000	-	-	-	750,000
Downtown Ed. Complex	Complex	75,000	-	-	-	75,000
District-wide	Playground Inspections/Repair	1,600,000	-	89,070	89,070	1,510,930
Lowell Middle	Modernization	11,910,000	-	-	-	11,910,000
Lowell Middle	Health Center	1,193,660	-	-	-	1,193,660
Elmhurst Middle	Modernization/ Small Schools	7,300,000	570,109	594,890	1,165,000	6,135,000
Madison Middle	Health Center	1,264,150	2,343	22,861	25,204	1,238,946
Havenscourt Middle	Modernization	3,451,708	110,686	2,000,979	2,111,665	1,340,043
Laurel Elementary	Fire Alarm Replacement	160,000	-	19,883	19,883	140,118
Manzanita Elementary	Modernization	3,950,064	972,333	971,839	1,944,172	2,005,892
Ralph Bunche	Modernization	7,500,000	391,451	336,275	727,726	6,772,274
Design Total [2]		141,691,376	2,194,209	4,269,443	6,463,652	135,227,724
CONSTRUCTION						
Chabot Elementary	Portable Replacement	18,900,000	1,984,206	6,791,160	8,775,367	10,124,633
Urban Promise Academy	Multi-purpose Gym	7,577,803	579,964	198,093	778,057	6,799,746
Montera	Modernization	6,535,000	109,777	386,206	496,982	6,039,018
Montera	Fire Alarm	525,000	6,208	25,002	31,210	493,790
Prescott Small Schools	Small Schools (PLACE)	3,475,000	55,873	231,240	287,113	3,187,887
Jefferson Elementary	Portable Replacement	23,000,000	360,280	1,316,839	1,677,119	21,322,881
Stonehurst	Restroom Renovation	1,380,000	-	58,335	58,335	1,321,665
Highland Small Schools	Fire Alarm Upgrade	400,000	4,653	22,558	27,211	372,789
Oakland High	Health Center	2,751,625	52,672	185,706	238,378	2,513,247

Site	Project	Budget	Prior Year Expenditures (06/07-07/08)	Current Year Expenditures (08-09)	Cumulative Expenditures	Variance
CONSTRUCTION CONT...						
Oakland High	Modernization	25,197,597	371,776	2,445,385	2,817,161	22,380,436
Cox Elementary	Additional Classroom	16,695,000	2,165,546	4,676,980	6,842,526	9,852,474
Cox Elementary	Modernization/ Small Schools	5,551,570	369,570	824,040	1,193,610	4,357,960
Construction Total [3]		111,988,595	6,060,523	17,161,544	23,222,067	88,766,528
CLOSE OUT						
Oakland High	Williams Settlement	18,484,338	10,685,091	7,345,159	18,030,250	454,088
Castlemont	Auditorium Renovations	3,570,000	177,332	3,151,441	3,328,773	241,227
Madison Middle	Modernization	8,798,084	1,438,339	5,443,832	6,882,170	1,915,914
Cole Middle School	Renovations	979,839	292,195	686,554	978,749	1,090
Cole Middle School	Health Center	71,950	11	71,938	71,950	-
Manzanita Elementary	Small Schools	150,000	-	-	-	150,000
Lincoln Elementary	Portable Replacement	9,091,800	575,347	6,259,646	6,834,993	2,256,807
Stonehurst	Small Schools (Esperanza)	610,000	-	242,874	242,874	367,126
Peralta	Modernization	1,739,308	38,304	1,088,209	1,126,512	612,796
Calvin Simmons	Modernization/Small Schools	4,232,059	1,916,099	1,910,982	3,827,081	404,978
Hoover	Modernization	4,504,462	62,979	4,048,673	4,111,652	392,810
Whittier	Modernization	4,294,240	1,757,243	1,919,237	3,676,481	617,759
Close Out Total [4]		56,526,079	16,942,939	32,168,545	49,111,484	7,414,596
COMPLETED						
Arts Far West	Intercom/PA/Clock Repairs	206,315	21,076	105,117	126,194	80,121
Oakland Tech	Oakland Tech Modernization	3,547,187	2,317,811	940,032	3,257,843	289,344
McClymonds	Intercom/PA/Clock Repairs	287,321	-	226,170	226,170	61,151
Cleveland Elementary	Modernization Phase 2	4,204,295	3,437,578	362,542	3,800,121	404,174
Bret Harte Middle	Modernization	5,814,622	167,641	4,572,506	4,740,146	1,074,476
Emerson Elementary	Modernization	4,277,550	3,819,203	78,473	3,897,676	379,874
Carter Middle	Modernization	3,325,000	2,263,672	602,858	2,866,530	458,470
Sequoia	Portable Installation	80,000	-	73,581	73,581	6,419
Laurel Elementary	Modernization	2,108,060	1,164,928	695,251	1,860,180	247,880
Redwood Heights	Portable Addition	157,500	142,787	-	142,787	14,713
Acorn/Woodland Library		500,000	-	-	-	500,000
Westlake	Modernization	10,375,000	3,707,897	1,749,744	5,457,641	4,917,359
Cole Middle School	Intercom/PA/Clock Repairs	182,992	21,524	124,827	146,351	36,641
Highland Small Schools	Interim Housing	400,000	64,405	151,519	215,924	184,076
Highland Small Schools	Modernization/ Small Schools	1,300,000	767,207	88,981	856,188	443,812
Joaquin Miller	ADA Accessibility	11,460	-	-	-	11,460
King Estates Small Schools	Small Schools	3,500,000	697,072	7,173	704,245	2,795,755
Lafayette	Intercom/PA/Clock Repairs	75,877	20,796	45,709	66,506	9,371
Webster Academy	Portable Demolition	195,000	205,196	-	205,196	(10,196)
Completed Total [5]		40,548,179	18,818,793	9,824,484	28,643,278	11,904,901
TOTAL		\$391,943,990	\$44,115,295	\$63,986,188	\$108,101,483	\$283,842,507

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



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