



Long Beach Unified School District  
Measure K Citizens' Bond Oversight Committee  
2013 Annual Report

May 6, 2014 (DRAFT)

To the Board of Education and residents of the Long Beach Unified School District:

The Measure K Citizens' Bond Oversight Committee ("COC" or "Committee") is pleased to present its fifth annual report. This annual report covers the activities of the Committee during the 2013 calendar year.

- Our fourth annual report was presented to the Board of Education at its regular Board Meeting on May 7, 2013 and covered the activities of the Committee from January 2012 through December 2012.
- We held five (5) regular meetings including a construction site tour of the new Cabrillo High School Pool project. Members also attended the grand opening ceremonies for the Ernest S. McBride, Sr. High School and Cabrillo High School Pool project.
- Four members completed their second term and new members were appointed to fill the Parent or Guardian with Child Enrolled in LBUSD seat, the Community-at-Large seat, the Business Organization seat, and the Senior Citizen Organization seat. One member was re-appointed to a second term to fill the Community-at-Large seat. In June, the District's bond council presented the committee an overview on the COC Bylaws and Ethics Policy Statement.
- The Committee elected a Chair (Dede Rossi) and a Vice-Chair (Maria Williams-Slaughter).
- At each of the regular meetings, the Committee reviewed and discussed the quarterly financial reports and was provided with project status reports. In December, the District's independent auditing firm attended a regular meeting to present and review the Measure K performance and financial audit.

### **Audits**

The independent auditing firm of Vincenti, Lloyd & Stutzman LLP completed a performance audit and a financial audit for the past calendar year. The audits covered fiscal year 2012-2013 for Measure K Bond activities from July 1, 2012 through June 30, 2013. In June, the Committee met with the audit team prior to the start of their work. In December, the Committee received, reviewed, and discussed the audit reports with the audit team. There were no findings related to the performance and financial audits.

## Financial Summary

The Committee received and reviewed expenditures through November 30, 2013, summarized as follows:

<b>Bond Issued Fiscal Year 2008/2009</b>	<b>\$260,000,000</b>
<b>Bond Issued Fiscal Year 2010/2011</b>	<b>\$75,426,686</b>
<b>Bond Issued Fiscal Year 2012/2013</b>	<b>\$50,000,000</b>
<b>Actual Interest Earnings</b>	<b>\$9,427,126</b>
<b>Bond Issuance Cost</b>	<b>(\$919,819)</b>
<b>Debt Retirement</b>	<b>(\$51,250,000)</b>

### **Expenditures by Site through November 30, 2013:**

▪ ADA Improvements Phase I	\$587,763
▪ Bancroft MS Gym AB300	\$472,227
▪ Boiler Replacement Phase I	\$3,552,865
▪ Cabrillo High School Pool	\$13,388,737
▪ CAMS HS Technology & Site Improvements	\$112,292
▪ Core Switch and UPS Replacement Phase I	\$ 235,716
▪ Core Switch and UPS Replacement Phase II	\$817,826
▪ DOH Portable Removal Phase I	\$ 429,244
▪ DSA Certification	\$1,898,660
▪ Ernest S. McBride Sr. High School New Construction	\$66,207,427
▪ Fire Alarm, Intercom & Clock Replacement Phase I	\$1,696,245
▪ Fire Alarm, Intercom & Clock Replacement Phase II	\$439,668
▪ Hamilton MS Gym AB300	\$122,484
▪ Harte ES Deportablization & Restroom Relocation	\$765,175
▪ Hill MS Gym AB300	\$108,371
▪ Hoover MS Gym AB300	\$371,978
▪ Intercom and Clock Replacement Phase I	\$ 472,291
▪ Intercom and Clock Replacement Phase II	\$94,474
▪ Jessie Elwin Nelson Middle School New Constructions	\$40,601,037
▪ Jessie Elwin Nelson MS Post Occupancy Closeout	\$242,651
▪ Jordan High School Interim Field Improvements	\$23,682
▪ Jordan High School Interim Housing	\$93,836
▪ Jordan High School Major Renovation Phase I	\$8,664,717
▪ Jordan HS Auditorium AB300	\$47,167
▪ Lakewood HS DOH Portable Removal	\$78,156
▪ Lakewood HS DSA Certification	\$3,345
▪ Lowell ES ADA Improvements	\$6,580
▪ Measure K Program Expenses	\$32,148,924
▪ New High School #2 at the Browning Site	\$3,755,178
▪ New High School #3 at the former JFA Site	\$318,548
▪ New High School #4 at the Butler Site	\$24,460
▪ New High School #5 at the Hill Site	\$ 34,635
▪ Newcomb K8 AB300/New Construction	\$8,798,942
▪ Polytechnic HS Auditorium AB300	\$1,270,643
▪ Polytechnic HS DSA Certification	\$113,353
▪ Portable Removal Phase I	\$393,366
▪ Portable Removal Phase II	\$458,353

▪ Portable Removal Phase III	\$79,777	
▪ Roosevelt Elementary School New Construction	\$6,547,518	
▪ Security Technology, Infrastructure, Intercom and Clock Replacement	\$513,835	
▪ Washington MS DSA Certification	\$12,655	
▪ Willard ES Minor Renovation/Addition	\$36,625	
▪ Wilson HS ADA Improvements	\$159,180	
▪ Wilson HS Auditorium AB300	\$1,158,718	
▪ Wireless Data Communications Phase I	\$2,099,158	
▪ Wireless Data Communications Phase II	\$3,370,932	<b>(\$202,829,413)</b>

**Expenditures Subtotal**

**(\$254,999,232)**

**Balance Remaining on Issuance**

**\$139,854,580**

**Project Status as of December 19, 2013**

**Jessie Elwin Nelson Middle School New Construction**

- Construction is 100% complete and the school opened on September 5, 2012.
- Project close-out activities are underway.
- Project has received \$12,903,722 in School Facilities Program (SFP) funds.
- The District anticipates using a total of \$40,601,637 in Measure K funds at the completion of this project.

**Jessie Elwin Nelson Middle School – Post Occupancy Closeout**

- Scope includes: Repairs, replacement, and additional minor construction related to school opening and post occupancy needs.
- The District anticipates using a total of \$379,423 in Measure K funds at the completion of this project.
- A portion of the close-out work will be performed by the Maintenance Branch.

**Ernest S. McBride, Sr. High School New Construction**

- Construction is 100% complete.
- School opened September 2013.
- Project has received \$6,000,000 in Career Technical Education (CTE) grants and \$9,024,908 in School Facilities Program (SFP) funds.
- Project close-out activities are underway.
- The District anticipates using a total of \$77,096,710 in Measure K funds at the completion of this project.

**Roosevelt Elementary School New Construction**

- Roosevelt students and staff were moved into interim housing at the Butler site.
- The Construction phase started on September 24, 2013.
- The District anticipates using a total of \$58,274,788 in Measure K funds at the completion of this project.
- School is projected to open September 2015.

**Cabrillo High School Pool**

- Construction is 100% complete.
- Pool is currently open and operating.

- Close-out is underway.
- The District anticipates using approximately \$15,974,542 in Measure K funds at the completion of this project.

#### **Newcomb K-8 AB300/New Construction**

- Students and Staff were moved into interim housing to the Keller site.
- Project has received confirmation of Seismic Mitigation Program (SMP) funding eligibility from the Division of State Architect (DSA).
- School is projected to open in the 2015/16 school year.
- The District anticipates using approximately \$65,993,909 in Measure K funds in total at the completion of this project.

#### **Harte Deportablization and Restroom Relocation**

- Construction is 100% complete on the removal of bungalow buildings and relocation of portable restroom building.
- The project is financially closed-out.
- The District anticipates using approximately \$765,175 in Measure K funds in total at the completion of this project.

#### **Wireless Data Communication Phase I**

- Construction is 100% complete on the replacement of edge switches and installation of wireless access points at 4 campuses (Longfellow ES, Marshall MS, Washington MS and Wilson HS).
- Project close-out activities are underway.
- The District anticipates using approximately \$2,099,158 of Measure K funds in total at the completion of this project.

#### **Projects in the planning and design phase:**

##### **Jordan High School Major Renovation**

- The District anticipates using approximately \$141,730,144 of Measure K funds in total at the completion of this project.
- Phase 1A has been DSA Agency Approved. Phase 1B and 1C is under DSA Agency Review.
- Construction documents for Phase 2B are underway.
- Design for Phase 2A, 4, 5, and 6 are underway.
- Construction is projected to start for Main Building Phase 1B in Summer 2014 with phased construction over several years.
- Interim Housing will begin January 2014 and athletic field improvements at JFA are currently underway.

##### **New High School #2 at the Browning Site**

- New small high school planned for 800 students.
- The District anticipates using approximately \$63,623,722 of Measure K funds in total at the completion of this project.
- Project has been submitted to DSA.
- Follow-up review with the CDE Agency, City of Signal Hill, and the City of Long Beach is underway.
- School is projected to open September 2016.

- Construction procurement for remediation and excavation is projected for spring 2014.

#### **New High School #3 at the Former Jordan Freshman Academy**

- Conversion of Jordan Freshman Academy to a small high school.
- The District anticipates using approximately \$5,000,000 of Measure K funds in total at the completion of this project.
- Construction document phase and DSA Agency review is pending.

#### **New High School #4 at the Butler Site**

- New small high school at former Butler site.
- The District anticipates using approximately \$2,500,000 of Measure K funds in total at the completion of this project.
- Conversion and School target opening is to be determined.

#### **New High School #5 at the Hill Site**

- New small high school at former Hill site.
- The District anticipates using approximately \$1,736,699 of Measure K funds in total at the completion of this project.
- Partial conversion is anticipated to start Summer 2014.

#### **Bancroft MS Gym AB300**

- Seismic upgrade to Gym.
- The District anticipates using approximately \$6,010,988 of Measure K funds in total at the completion of this project.
- Project has received confirmation of Seismic Mitigation Program (SMP) funding eligibility from the Division of State Architect (DSA) for Phase 1.
- Construction estimated to start Summer 2014.

#### **Hamilton MS Gym AB300**

- Seismic upgrade to Gym.
- The District anticipates using approximately \$1,339,797 of Measure K funds in total at the completion of this project.
- Project has received confirmation of Seismic Mitigation Program (SMP) funding eligibility from the Division of State Architect (DSA).
- Construction schedule is to be determined.

#### **Hill MS Gym AB300**

- Seismic upgrade to Gym.
- The District anticipates using approximately \$1,338,501 of Measure K funds in total at the completion of this project.
- Project has received confirmation of Seismic Mitigation Program (SMP) funding eligibility from the Division of State Architect (DSA).
- Construction schedule anticipated to start Fall 2015.

#### **Hoover MS Gym AB300**

- Seismic upgrade to Gym.
- The District anticipates using approximately \$4,602,411 of Measure K funds in total at the completion of this project.

- Project has received confirmation of Seismic Mitigation Program (SMP) funding eligibility from the Division of State Architect (DSA).
- Conceptual design is projected for January 2014.
- Construction is projected to start Summer 2014.

#### **Jordan HS Auditorium AB300**

- Seismic upgrade to Auditorium.
- The District anticipates using approximately \$19,036,870 of Measure K funds in total at the completion of this project.
- Project has received confirmation of Seismic Mitigation Program (SMP) funding eligibility from the Division of State Architect (DSA).

#### **Polytechnic HS Auditorium AB300**

- Seismic upgrade to Auditorium.
- The District anticipates using approximately \$20,312,196 of Measure K funds in total at the completion of this project.
- Project has received confirmation of Seismic Mitigation Program (SMP) funding eligibility from the Division of State Architect (DSA).
- DSA Agency submittal on December 13, 2013.
- Construction is projected to start Fall 2014.

#### **Wilson HS Auditorium AB300**

- Seismic upgrade to Auditorium.
- The District anticipates using approximately \$11,500,000 of Measure K funds in total at the completion of this project.
- Project has received confirmation of Seismic Mitigation Program (SMP) funding eligibility from the Division of State Architect (DSA).
- DSA Agency submittal on December 13, 2013
- Construction is projected to start Fall 2014.

#### **Portable Removal Phase II**

- Project to remove portable buildings from thirteen (13) campuses (Birney ES, Burbank ES, Cleveland ES, Gant ES, Gompers K8, Grant ES, Hamilton MS, King ES, MacArthur ES, Madison ES, McKinley ES, Riley ES, Webster ES).
- The District anticipates using approximately \$3,208,702 of Measure K funds in total at the completion of this project.
- There are two (2) removals complete (Burbank ES and Grant ES).
- Construction is anticipated for the remaining eleven (11) to start January 2014.

#### **Portable Removal Phase III**

- Project to remove portable buildings from ten (10) campuses (Addams ES, Barton ES, Burcham K-8, Burnett ES, Garfield ES, Marshall MS, Signal Hill ES, Stephens MS, Naples ES, Stanford MS).
- The District anticipates using approximately \$4,375,657 of Measure K funds in total at the completion of this project.
- Construction drawings for replacement portables are underway.
- Portable removal is anticipated to begin Summer 2014.

### **Boiler Replacement Phase 1**

- Replacement of twenty-one (21) boilers at nine (9) campuses (Bancroft MS, Beach HS, Gant ES, Kettering ES, Lakewood HS, Lowell ES, McKinley ES, Millikan HS, and Tincher Preparatory School).
- The District anticipates using approximately \$4,261,830 of Measure K funds in total at the completion of this project.
- Construction is 90% complete.
- Punch work is completed for Phase 1A and 1B. Punch work for Phase 1C is ongoing.

### **Fire Alarm, Intercom and Clock Replacement Phase I**

- Replacements of fire alarm, intercom and clock systems at nine (9) campuses (Addams ES, Bryant ES, Lee ES, Lincoln ES, McKinley ES, Rogers MS, Stephens MS, Washington MS and Willard ES).
- The District anticipates using approximately \$8,036,204 of Measure K funds in total at the completion of this project.
- Construction is underway for bid package #1 and #2
- Construction for bid package #3 is anticipated.

### **Fire Alarm, Intercom and Clock Replacement Phase II**

- Replacements of fire alarm, intercom and clock systems at eleven (11) campuses (Barton ES, Bixby ES, Cabrillo HS, Cleveland ES, Hudson K8, International ES, Jefferson MS, Kettering ES, Lindberg MS, Robinson K8, Webster ES).
- The District anticipates using approximately \$12,316,149 of Measure K funds in total at the completion of this project.
- DSA Agency Review has been approved.
- Construction is anticipated to start Summer 2014.

### **Intercom and Clock System Phase I**

- Replacement and new installation of intercom and clock system at twenty-seven (27) campuses.
- The District anticipates using approximately \$5,405,419 of Measure K funds in total at the completion of this project.
- Construction Documents are pending bid date.
- Construction is projected to start Spring 2014.

### **Intercom and Clock System Phase II**

- Replacement and new installation of intercom and clock system at twenty-four (24) campuses.
- The District anticipates using approximately \$3,106,376 of Measure K funds in total at the completion of this project.
- Site assessments and project scope development is underway.
- Construction is anticipated to start December 2014.

### **Security Technology, Infrastructure, Intercom, and Clock Replacement**

- Upgrade security technology, infrastructure, and replacement and new installation of intercom and clock system at eleven (11) campuses (Avalon K12, Beach HS, Cabrillo HS, EPHS, Lakewood HS, Millikan HS, PAAL, Polytechnic HS, Reid HS, Renaissance HS, and Wilson HS).

- The District anticipates using approximately \$8,370,493 of Measure K funds in total at the completion of this project.
- Site assessments and project scope development is completed.
- Final Design Review is underway.
- Construction is anticipated to start Summer 2014.
- Construction Procurement is anticipated to start Spring 2014.

#### **Telecommunication Phase I**

- Replacement of phone switch and handset at nine (9) campuses (Avalon K-12, Cabrillo HS, Jordan HS, Jordan Plus, Lakewood HS, Millikan HS, Polytechnic HS, Renaissance HS, and Wilson HS).
- The District anticipates using approximately \$1,837,248 of Measure K funds in total at the completion of this project.
- Site assessments and project scope development is completed.
- Construction is anticipated to start Spring 2014.

#### **Telecommunication Phase II**

- Replacement of phone switch and handset at thirty-three (33) elementary, middle, and small high school campuses.
- The District anticipates using approximately \$4,778,426 of Measure K funds in total at the completion of this project.
- Project anticipates receiving ERATE funds for Phase 2.
- Site assessments and project scope development is completed.
- Construction is projected to start Summer 2014.

#### **Telecommunication Phase III**

- Replacement of phone switch and handset at thirty-eight (38) campuses.
- The District anticipates using approximately \$4,040,051 of Measure K funds in total at the completion of this project.
- Construction is anticipated to start Summer 2015.

#### **Wireless Data Communication Phase II**

- Replacement of edge switches and installation of wireless access points at eighty (80) campuses.
- The District anticipates using approximately \$20,768,280 of Measure K funds in total at the completion of this project.
- Project anticipates receiving ERATE funds for thirty-three (33) elementary, middle, and high school sites.
- Construction schedule is 15% complete.

#### **CAMS Technology & Site Improvements**

- Technology and site improvements including: Fire alarm upgrade, intercom and clock replacement, wireless data communications, ADA accessible ramp/stair, and site signage.
- The District anticipates using approximately \$1,310,326 of Measure K funds in total at the completion of this project.
- DSA Agency review is underway.
- Construction is anticipated to start Summer 2014.

### **Wilson HS ADA Improvements**

- ADA improvements/accessibility improvements (i.e.: signage, parking seating, ramps, etc.)
- The District anticipates using approximately \$2,590,970 of Measure K funds in total at the completion of this project.
- DSA Agency submittal for PH 1A and 2 anticipated January 2014.
- Construction is anticipated to start Summer 2014.

### **Lowell ES ADA Improvements**

- ADA improvements including: Site accessibility and path of travel, site signage, main entry ramp, and new door hardware.
- The District anticipates using approximately \$700,725 of Measure K funds in total at the completion of this project.
- DSA Agency submittal is under review.
- Construction is anticipated to start Summer 2014.

### **Division of State Architect (DSA) Certification**

- DSA Certification and close-out of 392 applications identified to date.
- The District anticipates using approximately \$5,154,647 of Measure K funds in total at the completion of this project.
- Project is currently underway with strategic planning and close-out activities.
- Remedial work will be performed by the District's Maintenance Branch.
- 15 cleared sites, 284 certified projects as of December 2013.

### **Lakewood HS DSA Certification**

- Completing ADA/accessibility compliance improvements (i.e. handrails, ramps, wheelchair lift, etc.).
- The District anticipates using approximately \$368,551 of Measure K funds in total at the completion of this project.
- Post Inspection Plan is pending DSA review.
- Construction is anticipated to start Summer 2014.

### **Polytechnic HS DSA Certification**

- Scope of work includes: Completing restroom renovations for ADA/accessibility compliance.
- The District anticipates using approximately \$113,353 of Measure K funds in total at the completion of this project.
- Construction phase is completed.
- DSA Certification is underway.

### **Washington MS DSA Certification**

- Scope includes: Site accessibility and path of travel, new unisex restroom in basement, new ramp to basement, and accessible parking.
- The District anticipates using approximately \$1,041,969 of Measure K funds in total at the completion of this project.
- Submitted to DSA December 2013.
- Construction is anticipated to start Summer 2014.

**Wilson HS DSA Certification**

- Scope includes: Roof at buildings 100, 200, 300, and 400 (Clay roof tiles only).
- The District anticipates using approximately \$1,635,971 of Measure K funds in total at the completion of this project.
- Submitted to DSA Agency December 2013.
- Construction anticipated to start Summer 2014.

For more detailed information, please see the Citizens' Bond Oversight Committee website at [www.lbschools.net](http://www.lbschools.net) by clicking on Citizens' Oversight Committee, located in the Alphabet index under the letter C.

To the best of our knowledge, the District is in compliance with the requirements of Article XIII A, Section 1 (b) (3) of the California State Constitution.

2012-2013 Committee Members

*Representing:*

Dede Rossi, Chair  
Maria Williams-Slaughter, Vice Chair  
Dean Chow  
Julie Jackson  
Heather Morrison  
Rosi Pederson  
Kris Thornton

*Community-at-Large  
Taxpayer Association  
Community-at-Large  
Parent with Child Enrolled in LBUSD  
Parent with Child Enrolled in LBUSD and active in a PTO  
Senior Citizen Organization  
Business Organization*

Respectfully,

Dede Rossi, Chair