APPROVED FOR PROCESSING
BY SUPERINTENDENT'S OFFICE
6/13/23
Date
Signature

TITLE: CITIZENS' BOND OVERSIGHT COMMITTEE (CBOC) ANNUAL REPORT FOR FISCAL YEAR 2022

Business & Facilities
Information #2

June 13, 2023
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Business & Facilities

Background Information

In accordance with the accountability requirements of Proposition 39, the Board of Education established a Citizens' Bond Oversight Committee (CBOC) to oversee the expenditures and decisions affecting Measure X Bond Funds. Their role is basically an audit function with the responsibility to report to the public on the District's expenditures and consistency with Measure X.

Bylaws were approved by the Board of Education on February 21, 2017 to govern the activities of the Committee. Section 3.3 of the Bylaws states that the Committee shall present to the Board an annual written report which shall include the following: (a) A statement indicating whether the District is in compliance with the requirements of Article XIIIA, Section 1 (b) (3) of the California Constitution; and (b) A summary of the Committee's proceedings and activities for the preceding year.

At their regular meeting held on May 24, 2023, the CBOC approved the content of their Annual Report for Fiscal Year 2022. A copy of this report is attached hereto as Exhibit "A".

Recommendation

This report is for information only.

EXHIBIT "A"

Simi Valley Schools
SIMI VALLEY UNIFIED SCHOOL DISTRICT

Measure X – CBOC

CITIZENS' BOND OVERSIGHT COMMITTEE

Fiscal Year 2021 – 22

Measure X Annual Report



Simi Valley Measure X Citizens' Bond Oversight Committee

July 1, 2021 – June 30, 2022

Business & Facilities, Information #2

Dear Members, Board of Education Members, and Interested Members of the Public,

The Simi Valley Measure X Citizens' Bond Oversight Committee (CBOC or the Committee) is pleased to present its annual report for the Simi Valley Unified School District (SVUSD or the District) Fiscal Year 2021-22. Our independent CBOC was established, as required by law, to actively monitor all Measure X projects and expenditures; provide proper oversight, control, and accountability to ensure that Measure X bond funds are used as they were intended; and to inform the public concerning the District's expenditure of bond proceeds.

Measure X is a $239 million bond measure approved by voters on November 8, 2016, authorizing funding for the design and construction of new buildings, modernization of existing school facilities, and modern technology within SVUSD.

As members of the CBOC, our primary responsibility is to ensure bond proceeds are used appropriately and only spent for the construction, reconstruction, rehabilitation, or replacement of school facilities as listed in Measure X. Our duties also include informing the public if the bond proceeds are used effectively to enhance the quality of education for the students of the Simi Valley Unified School District.

We are happy to report that the District has made significant progress in accomplishing improvements to the schools with the bond funds, despite the recent challenges presented by the pandemic, supply chain issues, and inflation. The original plans for the projects have been impacted by the rising costs of construction materials and labor, resulting in a reduction in the number of projects originally anticipated. Nonetheless, the District has managed to move forward with many important projects.

During the 2021-22 fiscal year, the District was able to complete several important projects using Measure X funds, including:

- *Security Fencing /Curb Appeal*
- *The Royal HS boys' locker rooms*
- *Apollo HS received flooring abatement and new flooring in 2 rooms*
- *Santa Susana HS Irrigation project in preparation for the future Black Box Theatre Building*
- *Valley View Stairs*
- *Vista Classroom Remodel*
- *Continuous technology upgrades, including Microsoft Surface Pros, etc…*

The Committee's oversight has led us to the conclusion that the Measure X projects have made a significant positive impact on the quality of education and the learning environment for the students of the Simi Valley Unified School District.

The District has received funds from the Bond Series A, B, and C, for a total of $189.8M general obligation bonds, which are being utilized for implementation of Measure X projects. Series A was $70 million in June 2017, Series B was $60 million in May 2019, and Series C was $59.8 million in October 2020. The committee is aware that the District is planning to bring a fourth and final series to market under the Measure X authorization. This future Series D is anticipated to be for the amount of $49.2M at a date that is yet to be determined.

While the progress made with the Measure X funds has been significant, our committee's oversight has made it apparent that additional funding will be necessary to continue to maintain and make improvements to our schools in the future. We recognize that inflation, largely related to the pandemic,

has made it more challenging to complete projects at the expected cost, and we will continue to work closely with the District to ensure that all future bond funds are used efficiently and effectively.

We would like to extend our gratitude to the Board of Education for their ongoing support and dedication to the education of the students in the Simi Valley Unified School District. We also appreciate the support of the taxpayers who have made these important improvements possible.

This report will be posted to the CBOC's page on the District's website following its presentation to the board.

Sincerely,



Josh Mengers
Chair, Measure X CBOC

PURPOSE

As prescribed by the CBOC bylaws, our committee provides a written annual report that includes the following:

1. A statement indicating whether the District is in compliance with the requirements of Article XIIIA, Section 1(b)(3) of the California Constitution; and
2. A summary of the Committee's proceedings and activities for the preceding year.

DISTRICT COMPLIANCE

Through our ongoing oversight and review, the CBOC believes that the District is in compliance with the requirements of Article XIIIA, Section 1(b)(3) of the California Constitution, which provides that bond revenues are expended only for the construction, reconstruction, rehabilitation or replacement of school facilities, including the furnishing and equipping of school facilities, or the acquisition or lease of real property for school facilities; and that no funds were used for any other purpose including teacher and administrator salaries and other school operating expenses.

CBOC ACTIVITIES

Site Visits – The following section provides a brief summary of some of our oversight activities including site visits and site walks.

Valley View Stair Phase II project – February 3, 2022



Figure 1: Valley View stair project nearing completion

On February 3, 2022, District Measure X staff hosted CBOC member, Josh Mengers, on a site visit to see progress on the Phase II of the Measure X stair improvement project at Valley View Middle School. The project, to replace an old staircase with new stairs and ramp, was nearing completion. The project also added a new footwall at the base of the stairs to retain some of the slope of the hill and provide a place for students to sit. The site preparation was complete, the stairs formed, handrails installed, surrounding area graded, and three sapling trees planted on to the north of the new stairs. It appeared that the project plan incorporated saving a more-mature tree on the south side of the stairs. The landscaping on the surrounding the stairs still needed grass, which was scheduled to occur in the coming days.

At the bottom (West) of the stairs there are basketball courts, and the SVUSD Measure X project team described that there had been some previous issues with water pooling. This area had been regraded and would have new grass grown. The discussions with the SVUSD Measure X project team said that the contractor also has 60 days of maintenance in their contract, which is a good cost-saving measure to maximize bond proceeds.



Figure 2: The Valley View stair project in need of a few final landscaping touches.

This site visit supported the use of Measure X Bond to fund this project. The nearly completed stair project appears to be a great addition to the Valley View Middle School campus and should improve the safe access from the higher elevation campus classroom area to the lower basketball and athletic field areas.

Royal MPR Construction Site Walk – February 16, 2022 CBOC Meeting

The afternoon of February 16, 2022, the District hosted the CBOC on a tour to see the progress in the MPR renovation project at Royal High School.



Figure 3: CBOC members touring the Royal HS MPR Measure X project construction

Some of the items that were noted in the tour were:

- Higher-end pull out seating that can telescope back to make room for the space to be used for other functions, such as eating lunch.
- Ample storage space built-in under the stage
- Specialized acoustics with wooden finishes being installed around the MPR
- Planning for an outdoor stage that was not in budget for current project, but could be added into a future project.
- An elevator lift to second story control room for accessibility
- At the back (south) end of the MPR, indoor office space being constructed with outdoor store front
- Locations in the outdoor court yard for the display of donor bricks
- Stained glass window featuring performing arts icons



Figure 4: Left - the CBOC members enter the construction area at Royal High School MPR; Right - the North end of the Royal MPR with the optional future expansion for an outdoor stage

This project is an appropriate use of Measure X funding as the project ties to the bond language for the Multipurpose Room renovation project at Royal High School:

- *"Modernize, renovate, repair, expand and/or upgrade the interior and/or exterior of existing classrooms and school facilities."*
- *"Construct, upgrade and modernize athletic fields and facilities."*
- *"Upgrade, expand, construct/provide, repair and/or equip student support facilities including science labs, multipurpose rooms, cafeterias, auditoriums, libraries, locker rooms, and other school facilities."*
- *"Federal and State-mandated Americans with Disabilities Act (ADA) accessibility upgrades and as mandated by the Division of the State Architect (DSA) including site access, parking, restrooms, relocation of some existing electrical devices, drinking fountains, playground equipment, etc."*

Projects Completed – During the 2021-22 fiscal year, the District completed several important projects using Measure X funds, including:

- *The Royal High School boys' locker rooms*
  Completed August 2022
  Architect: Amador Whittle
  Contractor: Monet Construction



Figure 5: Royal HS Boys' Locker Room Renovation. The previous locker room before (Left), during the renovation (Center), and the archetect's rendering of the finished locker room

- *Valley View Middle School Stair Replacement (Phase II)*

  Previous existing stair was replaced with a new stair and ramp
  Completed May 2022
  Contractor: Ardalan Construction Company



Figure 6: The previous Valley View staircase (Left), and during removal and construction of the new stair (Center & Right)

- *Vista Elementary School Classroom Remodel*

  22 Classrooms remodeled: flooring, paint, ceiling tiles, tack boards & marker boards
  Completed September 2022
  Contractor: Omega Construction

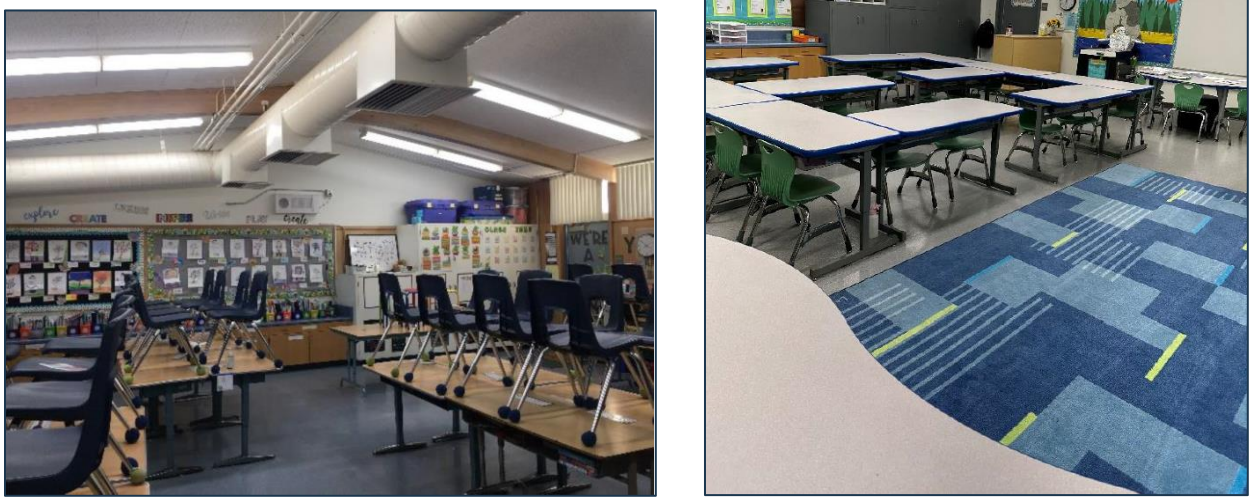


Figure 7: The Vista classroom renovation project. A classroom before the renovation (Left) and after the renovation (Right).

During this period Measure X funds were used to complete two additional projects: Apollo High School received flooring abatement and new flooring in two rooms, and Santa Susana High School completed an irrigation project in preparation of the Black Box Theatre.

Meetings – The committee held quarterly meetings this year occurring on August 18, 2021, November 17, 2021, February 16, 2022, and May 18, 2022. Each meeting is open to the public to provide input regarding the overall bond program, budget, financing matters and construction schedules.

Website (https://simi-ca.schoolloop.com/MXCBOC) – The District continues to assist in maintaining and updating a CBOC page on their website. This page provides the public with general information relating to the CBOC including meeting minutes, annual report, and audit reports. The district also maintains additional Measure X information on their website that provides updated Measure X expenditures, planning and construction schedules, budget reports, press releases, legislative requirements and other items of interest.

Facebook (https://www.facebook.com/simivalleycitizensbondoversightcommitteemeasurex) - The CBOC created a Facebook Page for the purpose of providing general information to the community at large relating to the CBOC, Measure X expenditures, planning and construction schedules, budget reports, press releases, legislative requirements and other items of interest.

Financial and Performance Audits – The sixth annual financial and performance audit of the Measure X program was finalized on March 15, 2023 by Eide Bailly LLP, an independent certified public accountant firm with an office in Rancho Cucamonga. These audits covered the fiscal year of July 1, 2021 thru June 30, 2022. The CBOC has reviewed both the financial and performance audits for Fiscal Year 2021-22, which did not identify any findings and concluded the District has properly accounted for the expenditures held in the Building Fund (Measure X) and that such expenditures were made for authorized Bond projects.

Annual Report – This document fulfills the CBOC's requirement for an annual written report to the Board of Education. This is the sixth Annual Report for the Measure X Bond issued by the CBOC.

CBOC Membership

At the beginning of fiscal year 2021-22, the CBOC was made of the following eight members: Jennifer Jones, Richard Grossman, Frank Sinsheimer, Shawn Herrera, Bethany Lowry, Kimberly Knight, Barry Fisher, and Steven Randall. During the year, all of these members' terms expired, with the exception of Mr. Randall and the following ten individuals began new terms as members of the CBOC committee: Jayesh Patel, John Strickler, Josh Mengers, Josh Platten, Omar Noorzai, Rasesh Mehta, Rebecca Hopkins, Anabel Moctezuma-Palafix, Katharine Smith, and Larry Borovay.

The final makeup of the CBOC committee on June 30, 2022 with details about term expiration dates, position held and representation from each of the categories required by California Education Code 15282 is shown in Table 1: California Education Code 15282 states that the Committee shall consist of at least seven members, who shall serve for a minimum term of two years and for no more than three consecutive terms. The committee shall have a member from each of the required categories shown in this table. Note that throughout the year, the CBOC's membership always included at least seven members with at least one member from each of the required categories.

				Required Categories				
CBOC Member	**Current Position**	**Current Term End Date**	**Term #**	**Local Business Org.**	**Senior Citizens Org.**	**Bona-Fide Taxpayers Org.**	**Parent / Guardian of Child Enrolled in District**	**Parent/Guardian & Active in PTA or School Site Council**
Steven Randall	Vice Chair	6/30/2023	3			X		
Jayesh Patel	Co-Publicity Chair	9/30/2023	1				X	
John Strickler		9/30/2023	1		X			
Josh Mengers	Chair	9/30/2023	1				X	X
Josh Platten		9/30/2024	2				X	
Larry Borovay		9/30/2024	1	X				
Omar Noorzai		9/30/2024	2				X	X
Rasesh Mehta		9/30/2023	1				X	X
Rebecca Hopkins	Secretary / Co Publicity	9/30/2024	2			X	X	

Table 1: California Education Code 15282 states that the Committee shall consist of at least seven members, who shall serve for a minimum term of two years and for no more than three consecutive terms. The committee shall have a member from each of the required categories shown in this table.