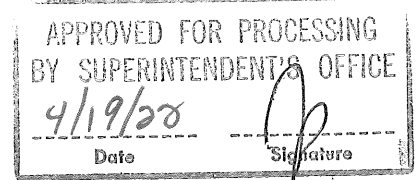


Simi Valley Schools

SIMI VALLEY UNIFIED SCHOOL DISTRICT

**BOARD APPROVED ITEMS
FOR THE
4.19.22 BOE MEETING**



TITLE: AUTHORIZATION TO AWARD BID #B22FS372, VISTA ES CLASSROOM RENOVATION

Business & Facilities
Consent #7

April 19, 2022
Page 1 of 1

Prepared by: Ron Todo, Associate Superintendent
Business and Facilities

Background Information

Four bids were received on March 22, 2022 for Bid #B22FS372, Vista ES Classroom Renovation. The recommended low bidder is indicated in bold type.

Construction Company Name

Bid Amount

Ardalan Construction Company, Inc.
Omega Construction Company, Inc
The Nazerian Group
Waisman Construction, Inc.

\$378,000.00
\$355,000.00
\$444,123.00
\$427,577.00

Additional information is available in the Bond Management Office.

Fiscal Analysis

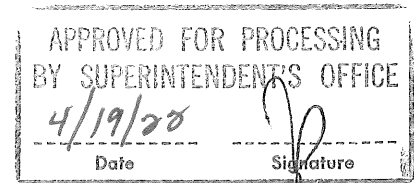
The total amount of this project \$355,000.00 will be funded by Measure X Bond Funds.

Recommendation

It is recommended that the Board of Education authorize award of Bid #B22FS372, Vista ES Classroom Renovation to Omega Construction Company, Inc. in the amount of \$355,000.00.

On a motion # 1579 by Trustee Smollen, seconded by Trustee Bagdasaryan and carried by a vote of 5/0, the Board of Education approved, by roll-call vote, award of the Vista ES Classroom Renovation, Bid #B22FS372, to Omega Construction Company, Inc.

AYES: Subram
Losbelle
Smollen
Bagdasaryan
Blough NOES: 0 Absent: 0 Abstained: 0



**TITLE: APPROVAL OF AMENDMENT #2 TO AGREEMENT NO. R20-02607
BETWEEN SIMI VALLEY UNIFIED SCHOOL DISTRICT AND RACHLIN
PARTNERS, FOR THE DESIGN SERVICES FOR A NEW CTE BUILDING
AT SANTA SUSANA HIGH SCHOOL**

Business & Facilities
Consent #8

April 19, 2022
Page 1 of 1

Prepared by: Ron Todo, Associate Superintendent
Business & Facilities

Background Information

Rachlin Partners are the Architect of Record preparing the construction documents for the New Black Box Theater at Santa Susana High School.

The Architect's contract is based on a percentage of construction costs, per the OPSC (Office of Public-School Construction) sliding scale. The original budget was based on the Master Plan budget of construction costs of \$3,938,500.00 and the architect's fee of \$391,965.00 (Including Theater Consultant Fee).

The revised estimated is based on the final design and scope increases which includes the relocation of the existing relocatable classroom buildings that were initially scheduled to be demolished. The revised construction estimate costs is \$7,726,214.00, revising the architect's fee to \$696,035.

\$ 266,370.00 Amendment #2 (Difference between \$696,370 - \$391,965)
\$ 11,758.00 3% Reimbursable of original contract amount
\$ 278,128.00 Total Amendment #2

Fiscal Analysis

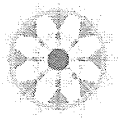
\$ 391,965.00 Original Contract (Not including reimbursables)
\$ 37,700.00 Amendment #1
\$ 278,128.00 Amendment #2 including 3% reimbursables
\$ 707,793.00 Total Revised Contract, paid by Measure X funds

Recommendation

It is recommended that the Board of Education approve Amendment #2 Agreement R20-02607 for architectural and engineering services for the CTE Building at Santa Susana HS.

On a motion #1579 by Trustee Smollen, seconded by Trustee Bagdasaryan and carried by a vote of 5/0, the Board of Education approved, by roll-call-vote, Amendment #2 to Agreement No. R20-02607 with the firm of Rachlin Partners.

Ayes: Jubran
Labelle
Smollen
Bagdasaryan
Elough Noes: 0 Absent: 0 Abstained: 0



Simi Valley Schools
SIMI VALLEY UNIFIED SCHOOL DISTRICT

101 West Cochran Street, Simi Valley, CA 93065
805.306.4500 ext.4461

CONTRACT AMENDMENT

Project Name: Black Box Theater	Amendment #: 2	
Site: Santa Susana HS	Board Date: April 19, 2022	
To (Architect): Rachlin Partners	DSA Application #: 03-121695	
Address: 8640 National Blvd Culver City, CA 90232	Contract #: R20-02607	Contract Date: Dec 18, 2019
	PO #: P20-0628	PO Date:

THE CONTRACT IS CHANGED AS FOLLOWS:

Rachlin Partners are the Architect of Record preparing the construction documents for the New Black Box Theater at Santa Susana High School.

The Architect's contract is based on a percentage of construction costs, per the OPSC (Office of Public-School Construction) sliding scale. The original budget was based on the Master Plan budget of construction costs of \$3,938,500.00 and the architects fee of \$391,965.00 (Including Theater Consultant Fee).

The revised estimated is based on the final design and scope increases which includes the relocation of the existing relocatable classroom buildings that were initially scheduled to be demolished. The revised construction estimate costs is \$7,726,214.00, revising the architects fee to \$658,335 (Including the Theater Consultant Fee).

\$266,370.00 Amendment #2 (Difference between \$658,335- \$391,965)

\$ 11,758.00 3% Reimbursable of original contract amount

\$278,128.00 Total Amendment #2

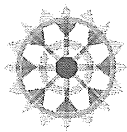
\$391,965.00 Original Contract (Not including reimbursables)

\$ 37,700.00 Amendment #1

\$ 278,128.00 Amendment #2 including 3%reimbursables

\$ 707,793.00 Total Revised Contract, paid by Measure X funds

The terms and conditions of Agreement A18.074 for Ongoing Architect Services, apply to these additional services.



SimiValleySchools

SIMI VALLEY UNIFIED SCHOOL DISTRICT

101 West Cochran Street, Simi Valley, CA 93065
805.306.4500 ext.4461

Adjustment to Contract Amount	Adjustment to Contract Schedule
Original Contract Amount: \$ 391,965.00	Original Contract Duration: N/A
Prior Contract Adjustments: \$ 37,700.00	Original Completion Date: May 24, 2022
Contract Sum Prior to this Amendment: \$ 429,665.00	Total Approve Time Extension to Date: December 15, 2023
Adjustment per this Amendment: \$ 278,128.00	Adjustments per this Amendment:
Revised Contract Amount: \$ 707,793.00	Completion Date Including to December 15, 2023

The amounts and/or time listed in this change order are full, complete and final mutual account and satisfaction from all direct, indirect, impact, delay cost and time for the work defined in this Amendment. All other terms and conditions of the original contract are to remain the same.

Richard Ingrassia / Partner Rachlin Partners 4/21/2022 11:11 AM PDT	<u>Richard Ingrassia</u> (Signature) (Date)	4/18/2022 8:32 AM PDT [SimiPCC20118]
David Pegg / Malihe Shokouhi Project Coordinator 4/21/2022 11:11 AM PDT	<u>Malihe Shokouhi</u> (Signature) (Date)	4/21/2022 1:51 PM PDT
JEFF KIPP Construction Project Manager 4/21/2022 11:11 AM PDT	<u>Jeff Kipp</u> (Signature) (Date)	4/21/2022 3:27 PM PDT
LORI RUBENSTEIN Bond Program Manager 4/21/2022 11:11 AM PDT	<u>LORI RUBENSTEIN</u> (Signature) (Date)	4/22/2022 8:20 AM PDT DR
RON TODO Associate Superintendent, Business & Facilities 4/21/2022 11:11 AM PDT	<u>R. TODO</u> (Signature) (Date)	4/25/2022 2:23 PM PDT

March 9, 2022

Ms. Lori Rubenstein
Facilities and Planning
Simi Valley Unified School District
875 East Cochran Street
Simi Valley, California 93065

RACHLIN
P A R T N E R S

**RE: SANTA SUSANA HIGH SCHOOL
CTE BUILDING – CONTRACT AMENDMENT**

Dear Ms. Rubenstein:

Rachlin Partners is requesting an amendment to our contract fee for the Santa Susana High School Black Box Theater due to increased scope and updated construction budget based on the final design of the project. The initial contract fee was based on the OPSC Fee schedule and a preliminary budget that was determined before the project scope was fully developed in the amount of \$3,938,500.00.

Currently the Santa Susana High School Black Box Theater has been fully designed and is anticipated to receive agency approval at the end of this month. The revised project budget is inclusive of the final design and scope increases which includes the relocation of the existing relocatable classroom buildings that were initially scheduled to be demolished. This scope addition required additional electrical, civil and irrigation engineering. The revised Construction Budget, excluding escalation and project contingency is \$7,726,214.00. Utilizing the OPSC Fee Schedule used to calculate the original project fee, the revised fee shall be \$696,034.98. This represents an increase in the Architectural and Engineering fee in the amount of \$266,369.98.

If you have any questions, please call me at (310) 204-3400.

Sincerely,



Richard Ingrassia, AIA, LEED
Partner

Certificate of Completion

Envelope Id: 181D61B604AC469485017228FD63E848
 Subject: Please DocuSign: Rachlin Black Box Amendment #2.pdf
 Source Envelope:
 Document Pages: 3
 Certificate Pages: 6
 AutoNav: Enabled
 EnvelopeId Stamping: Enabled
 Time Zone: (UTC-08:00) Pacific Time (US & Canada)

Status: Completed

Envelope Originator:
 Bond Contracts
 bondcontracts@simivalleyusd.org
 IP Address: 207.157.143.39

Record Tracking

Status: Original 4/12/2022 2:02:16 PM	Holder: Bond Contracts bondcontracts@simivalleyusd.org	Location: DocuSign
Security Appliance Status: Connected	Pool: StateLocal	
Storage Appliance Status: Connected	Pool: Simi Valley Unified School District - Facilities	Location: DocuSign

Signer Events

Richard Ingrassia
 ringrassia@rachlinpartners.com
 Security Level: Email, Account Authentication
 (None)

Signature

Richard Ingrassia

Signature Adoption: Pre-selected Style
 Signed by link sent to
 ringrassia@rachlinpartners.com
 Using IP Address: 24.43.108.106

Timestamp

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 Signed: 4/18/2022 8:32:58 AM

Electronic Record and Signature Disclosure:

Accepted: 4/18/2022 8:32:38 AM
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David Pegg
 david.pegg@simivalleyusd.org
 Security Level: Email, Account Authentication
 (None)

David Pegg

Signature Adoption: Pre-selected Style
 Signed by link sent to david.pegg@simivalleyusd.org
 Using IP Address: 207.157.143.2

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Malihe Shokouhi
 malihe.shokouhi@simivalleyusd.org
 Security Level: Email, Account Authentication
 (None)





Malihe Shokouhi

Signature Adoption: Pre-selected Style
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 malihe.shokouhi@simivalleyusd.org
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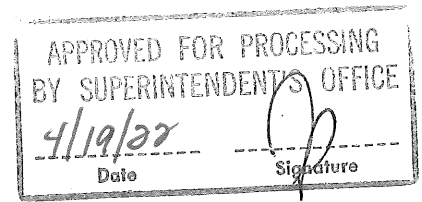
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Electronic Record and Signature Disclosure:

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Signer Events	Signature	Timestamp
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LORI RUBENSTEIN lori.rubenstein@simivalleyusd.org Security Level: Email, Account Authentication (None)	 Signature Adoption: Pre-selected Style Signed by link sent to lori.rubenstein@simivalleyusd.org Using IP Address: 207.157.143.41	Sent: 4/21/2022 3:27:48 PM Viewed: 4/22/2022 8:20:37 AM Signed: 4/22/2022 8:20:47 AM
Electronic Record and Signature Disclosure: Not Offered via DocuSign		
Desiree Rask desiree.rask@simivalleyusd.org Security Level: Email, Account Authentication (None)	 Signature Adoption: Pre-selected Style Signed by link sent to desiree.rask@simivalleyusd.org Using IP Address: 207.157.143.2	Sent: 4/22/2022 8:20:48 AM Viewed: 4/22/2022 10:06:54 AM Signed: 4/22/2022 10:07:40 AM
Electronic Record and Signature Disclosure: Not Offered via DocuSign		
Ron Todo ron.todo@simivalleyusd.org Simi Valley Unified School District - Facilities Security Level: Email, Account Authentication (None)	 Signature Adoption: Uploaded Signature Image Signed by link sent to ron.todo@simivalleyusd.org Using IP Address: 207.157.143.41	Sent: 4/22/2022 10:07:42 AM Viewed: 4/25/2022 2:22:56 PM Signed: 4/25/2022 2:23:19 PM
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Carbon Copy Events	Status	Timestamp
Witness Events	Signature	Timestamp

Notary Events	Signature	Timestamp
Envelope Summary Events	Status	Timestamps
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Completed	Security Checked	4/25/2022 2:23:19 PM
Payment Events	Status	Timestamps
Electronic Record and Signature Disclosure		



TITLE: APPROVAL OF AGREEMENT NO. R22-03650 BETWEEN SIMI VALLEY UNIFIED SCHOOL DISTRICT AND KNOWLAND CONSTRUCTION SERVICES, INC. FOR INSPECTION SERVICES FOR THE CLASSROOM RENOVATION PROJECT AT SIMI VALLEY HIGH SCHOOL

Business & Facilities
Consent #9

April 19, 2022
Page 1 of 1

Prepared by: Ron Todo, Associate Superintendent
Business & Facilities

Background Information

The District requires inspection services on an as-needed basis for the classroom renovation project at Simi Valley High School. The Bond Management Office interviewed inspectors from four firms on the list of selected firms approved by the Board of Education on December 12, 2017. The firm of Knowland Construction Services, Inc. is on the list and has proposed an inspector who has the qualifications and experience required for this project.

Fiscal Analysis

Project

Estimated Cost

Simi Valley HS Classroom Renovation Project

\$51,156.00

Actual cost will be based on actual inspection services performed. Said Agreement is attached as Exhibit "A". These services are based on a billing rate of \$98.00 per hour, and will be funded by Measure X.

Recommendation

It is recommended that the Board of Education approve Agreement No. R22-03650 Between Simi Valley Unified School District and Knowland Construction Services, Inc. for Inspection Services for Simi Valley HS Classroom Renovation Project.

On a motion # 1579 by Trustee Smollen, seconded by Trustee Bagdasaryan and carried by a vote of 5/0, the Board of Education approved, by roll-call-vote, Agreement No. R22-03650 Between Simi Valley Unified School District and Knowland Construction Services, Inc. for Inspection Services for the Simi Valley HS Classroom Renovation Project.

Ayes: Jubran
LaBelle Noes: 0 Absent: 0 Abstained: 0
Smollen
Bagdasaryan
Blough

**AGREEMENT FOR ON-GOING PROJECT INSPECTOR SERVICES
PROJECT ASSIGNMENT AMENDMENT**

Simi Valley HS – Classroom Renovation

AGREEMENT R22-03650

This Project Assignment Amendment (“PAA”) is entered by and between Simi Valley Unified School District and Knowland Construction Services, Inc. (“Inspector Firm”) as of April 19, 2022.

WHEREAS, the District and Inspector Firm entered into a written Agreement entitled Agreement No. A22.088 for On-Going Project Inspector Services (“Agreement”) generally establishing terms and conditions for the Project Inspector’s inspection services for Projects assigned by the District to the Inspector Firm for completion of Project Inspector Services.

WHEREAS, this PAA sets forth the specific terms and conditions applicable to the Assigned Project and the Project Inspector Services to be completed by the Inspector Firm for the Assigned Project.

NOW THEREFORE, the District and Project Inspector agree as follows:

1. Assigned Project Description. The Assigned Project is described as follows: Provision of a Inspector for the Simi Valley Classroom Renovation Project. The Inspector shall be assigned by Knowland Construction Services, Inc. to the project for the duration of the Project, unless another inspector is requested by the District. The inspector is to remain consistent throughout the project and cannot be replaced without approval from the District.
2. Project Inspector Services for Assigned Project. The Inspector Firm shall complete all Project Inspector Services for the Assigned Project set forth in the Agreement, including but not limited too: Preconstruction services, Phases Schematic through Project Closeout.
3. Project Inspector. The Inspector Firm designates one of the following the Project Inspectors: Dan Alberico, Keith Devine or Wayne Quier, for completion of Project Inspector Services for the Assigned Project. The Inspectors cannot be interchanged. The Inspector assigned will remain through the duration of the project. The Project Inspector must pass DOJ fingerprinting requirements identified in California Education Code Section 45125.1. The hourly billing rate for the Project Inspector designated for the Assigned Project is set forth in Attachment 1 to this PAA and is not subject to adjustment, and includes all projected costs related to AB-5, which became effective beginning on January 1, 2020. The billing is to be monthly.
4. Assigned Project Contract Price. The Contract Price for completing Project Inspector Services for the Assigned Project is an **estimated Fifty-One Thousand, One-Hundred Fifty-Six Dollars (\$51,156.00)** (“Assigned Project Contract Price”) per the attached Proposal from Inspector Firm dated March 17, 2022 (Attachment 2- For Fee Only). Billings for payment of the Assigned Project Contract Price shall be based on the actual and reasonable time necessary for the Project Inspector designated for the Assigned Project to complete Project Inspector Services, multiplied by the applicable hourly rate. Billings for Project Inspector Services shall be at the Straight Time hourly rates, unless the District has authorized in advance the completion of Project Inspector Services on days/times subject to Overtime or Premium Overtime hourly rates. No payment will be made and the Inspector Firm is not entitled to any compensation for any Project Inspector Services necessary as a result of the failure of the Inspector Firm to timely and completely provide Project Inspector Services. The Assigned Project Contract Price is not subject to adjustment, except as provided in Paragraph 5 of this PAA.

5. Term of PAA. The District has established the project schedule as follows:

- Quad D: Preconstruction start April 20, 2022, Construction estimated start date June 6, 2022, completion estimated August 4, 2022.
- Quad K: Preconstruction start April 20, 2022, Construction estimated start date August 11, 2022, completion estimated November, 2022.
- Quad B: Preconstruction start April 20, 2022, Construction estimated start date November, 2022, completion estimated January 2023.
- Quad B: Preconstruction start April 20, 2022, Construction estimated start date November, 2022, completion estimated January 2023.

Schedule subject to change.

The actual start date for these inspection services will be based on the successful bid and award of the project. The Assigned Project Contract Price is based on the Construction Duration of the Assigned Project. If Project construction is not completed within the Construction Time and the Assigned Project Contract Price is not exhausted as of expiration of the Construction Time, the Inspector shall provide Project Inspector Services after expiration of the Construction Time without adjustment of the Assigned Project Contract Price until the Assigned Project Contract Price is exhausted. If Project construction is not completed within the Construction Time and the Assigned Project Contract Price is exhausted at the expiration of the Construction Time, or if the unexhausted portion of the Assigned Project Contract Price as of expiration of the Construction Time is exhausted prior to completion of Project Construction, the Assigned Project Contract Price is subject to adjustment by the District, for the Project Inspector Services provided after expiration of the Construction Time.

6. Agreement Terms. All terms of the Agreement for Ongoing Services A22.088 are incorporated herein and applicable to the Assigned Project, except as modified by the terms of this PAA.

IN WITNESS HEREOF, the District and the Architect have executed this Project Assignment Amendment as of the date set forth above.

District
Simi Valley Unified School District

"INSPECTOR FIRM"
Knowland Construction Services, Inc.

By: R. J. Todo 4/20/2022 | 9:09 AM PDT
Ron Todo
Associate Superintendent,
Business & Facilities

By: Chris Knowland 3/31/2022 | 10:37 AM PDT
Christopher Knowland
President

DR

ATTACHEMENT 1
AGREEMENT A22.088
PROJECT ASSIGNMENT AMENDMENT FOR PROJECT INSPECTOR SERVICES, R22-03650
PROJECT: Simi Valley HS – Classroom Renovation

Project Inspector (Knowland Construction Services, Inc. to designate below)	DSA Certification No.	Hourly Billing Rate
		Straight Time Mondays-Fridays (8 hour work day)\$98.00
		Overtime (authorization by District in advance required) Mondays-Fridays (more than 8 hours per work day) Saturdays (8 hour workday 7 AM to 6 PM)TBD
		Premium Overtime (authorization by District in advance required) Saturdays (more than 8 hours per work day) Sundays HolidaysTBD

ATTACHEMENT 2 - FOR FEE ONLY

Knowland Construction Services

March 17, 2022

PROPOSAL FOR PROJECT INSPECTORS

SCHOOL DISTRICT: Simi Valley Unified School District

INSPECTORS: Wayne Quier / Dan Alberico / Keith Devine (or other IOR / PE as approved)

PROJECT: Simi Valley High School
Classroom Renovations

DURATION: June 1, 2022 – September 30, 2023
(and per Exhibit A Attached Herein)

RATE: DSA Class I \$98.00/hour
DSA Class 2 \$88.00/hour
DSA Class 3 \$82.00/hour
Project Eng. \$68.00-\$72.00

TOTAL ESTIMATE: 13 months / 522 hrs.: \$51,156.00

Additional Compensation: Option for Preconstruction Services from 3/15/2022-5/31/2022
NTE \$6,566.00

PROJECT INSPECTOR AGENCY AGREEMENT AND CONTRACT DUTIES:

1. Knowland Construction Services agrees to provide for continuous inspection of work for compliance with approved contract documents. Project Inspector duties as outlined in Title 24, Part 1, Chapter 4, Sections 4-333 thru 4-342 California Code of Regulations, including DSA Interpretive Regulations A-6, A-7, A-8, and as incorporated in the following paragraphs.
2. Represent the District under the guidance of the designee of the District Superintendent.
3. Attend all planning, pre-construction conference, project meetings, or meetings as required by the District.
4. Monitor and observe all Special Inspections performed by the Districts contracted Testing Lab as required by the Testing and Inspections Sheet and as outlined in the Project Specifications. Maintain and update a log specifying hours spent on the project by Special Inspectors. Perform or monitor testing for Torque, Epoxy, Pull Tests and other tests as approved by the DSA Field Engineer. Knowland Construction Services shall assist in minimizing unnecessary costs for testing where possible.
5. The District & the Inspector, Knowland Construction Services, shall each defend and hold

harmless each other against any losses, liabilities, damages, injuries, claims, costs, or expenses arising out of, or connected with the provisions of this agreement and the contract documents.

6. The Agreement shall begin upon written notice by a representative of the District and remain in effect continuously until project closeout, unless terminated in writing. Contract is intended to be an agency agreement and may be terminated in 15 days by either party with or without cause. This Agency Agreement shall be assignable to other schools within the District, and shall apply to other Inspectors as requested and approved by the District. The District shall not employ, contract, or engage in business or mutually beneficial relationships with Inspectors introduced to the District through Knowland Construction Services for a period of two (2) years after the dissolution of any contracts through Knowland Construction Services unless permission is granted prior to such relationships.
7. Knowland Construction Services shall maintain in effect a \$2 million General Liability insurance policy, Workman's Compensation as required, and Full Liability Auto Insurance as required. District requests for additional insurances shall be paid additionally by the District at current market rates.
8. Simi Valley Unified School District agrees to pay Knowland Construction Services the cost of project services billed at the rate as outlined in the fee schedule within 30 working days of receipt of invoice. Knowland Construction Services (Project Inspectors / Project Managers/Engineers) shall provide all necessary cell phones, laptop computers, digital cameras, and equipment necessary to maintain proper documentation and administrative functions throughout the duration of the project. KCS shall provide all utility lines, office space and furniture on an off-site location. KCS at it's own discretion may utilize project managers or project engineers to perform administrative, report writing, DSA Box, and other duties where it is in the interest of the project.
9. When an IOR is on vacation or unable to be at the project for reasons beyond his reasonable control, a Project Manager / Project Engineer will be assigned to oversee the project, and shall be responsible for the accurate reporting of all activities to the Inspector of Record. Hours billed for inspection services shall include only hours worked in support of the project. Other billing arrangements may be as agreed in writing by the District.

Christopher Knowland

Christopher Knowland – KCS
Knowland Construction Services

Agent – Simi Valley Unified School District

Certificate Of Completion

Envelope Id: 07B86E4B8F70483FBB78DDE2AE762720

Status: Completed

Subject: Please DocuSign: R22-03650 - SVHS Classroom Renovations Inspection.pdf

Source Envelope:

Document Pages: 5

Signatures: 2

Envelope Originator:

Certificate Pages: 5

Initials: 1

Bond Contracts

AutoNav: Enabled

bondcontracts@simivalleyusd.org

EnvelopeId Stamping: Enabled

IP Address: 207.157.143.39

Time Zone: (UTC-08:00) Pacific Time (US & Canada)

Record Tracking

Status: Original

Holder: Bond Contracts

Location: DocuSign

3/24/2022 12:08:56 PM

bondcontracts@simivalleyusd.org

Security Appliance Status: Connected

Pool: StateLocal

Storage Appliance Status: Connected

Pool: Simi Valley Unified School District - Facilities Location: DocuSign

Signer Events**Signature****Timestamp**

Chris Knowland

chrisk@knowlandinc.com

Security Level: Email, Account Authentication
(None)

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Signature Adoption: Pre-selected Style

Signed by link sent to chrisk@knowlandinc.com

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Electronic Record and Signature Disclosure:

Accepted: 3/31/2022 10:36:53 AM

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Desiree Rask

desiree.rask@simivalleyusd.org

Security Level: Email, Account Authentication
(None)

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Signature Adoption: Pre-selected Style

Signed by link sent to

desiree.rask@simivalleyusd.org

Using IP Address: 207.157.143.2

Electronic Record and Signature Disclosure:

Not Offered via DocuSign

Ron Todo

ron.todo@simivalleyusd.org

Simi Valley Unified School District - Facilities

Security Level: Email, Account Authentication
(None)

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Signature Adoption: Uploaded Signature Image

Signed by link sent to ron.todo@simivalleyusd.org

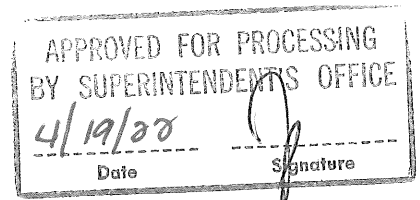
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Electronic Record and Signature Disclosure:

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In Person Signer Events**Signature****Timestamp****Editor Delivery Events****Status****Timestamp****Agent Delivery Events****Status****Timestamp**

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Electronic Record and Signature Disclosure		



TITLE: RATIFICATION OF MEASURE X FUNDED FIELD CONTRACTS UNDER CUPCCAA AND AGREEMENTS; AUGUST 9, 2021 TO MARCH 6, 2022

Business & Facilities
Consent #10

April 19, 2022
Page 1 of 1

Prepared by: Ron Todo, Associate Superintendent
Business & Facilities

Background Information

The District adopted the California Uniform Public Construction Cost Accounting Act ("CUPCCAA") which authorizes the District to engage in alternative bidding procedures for public works and maintenance projects. The District's adoption of CUPCCAA includes authorization for the District's Associate Superintendent, Business & Facilities to enter into contracts bid under CUPCCAA alternative bidding procedures when the value of the contract is \$200,000 or less, as of January 1, 2019. CUPCCAA contracts entered into by the Associate Superintendent, Business & Facilities pursuant to such authority are subject to ratification by the Board of Education.

Many of the projects funded with Measure X proceeds are smaller dollar value projects. To expedite obtaining cost proposals and the construction of Measure X funded projects valued at \$60,000 or less, District staff has utilized the CUPCCAA alternative bidding procedures with the District's Field Contracts.

Exhibit "A" is a summary listing of the Field Contracts funded by Measure X proceeds and awarded by the Associate Superintendent, Business & Facilities under the CUPCCAA alternative bidding procedures between August 9, 2021 and March 6, 2022.

Fiscal Analysis

The total amount for Measure X funded Field Contracts issued under CUPCCAA between August 9, 2021 and March 6, 2022 is **\$253,187.63** as shown on Exhibit "A".

Recommendation

It is recommended that the Board of Education ratify the Field Contracts summarized in attached Exhibit "A".

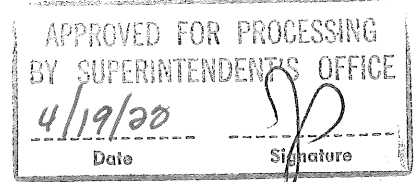
On a motion # 1579 by Trustee Smollen, seconded by Trustee Bagdasaryan and carried by a vote of 5/0, the Board of Education Ratified, by roll-call-vote, Measure X Funded Field Contracts Under CUPCCAA and Agreements; August 9, 2021 to March 6, 2022.

Ayes: Jubran
LaBelle
Smollen
Bagdasaryan
Blough Noes: 0 Absent: 0 Abstain: 0

MEASURE X FIELD CONTRACTS UNCR CUPCAA AND AGREEMENTS FROM 8/9/2021 - 3/6/2022

Req Date	Req #	PO #	Vendor	Total Amt	Comment
8/9/2021	R22-00924	P22-00703	FENCE FACTORY	\$39,927.50	ARROYO FENCE K & SCREEN @ ELECTRICAL
8/11/2021	R22-00957	P22-00644	HUGHES GENERAL ENGINEERING	\$4,955.40	ARROYO & BW MONUMENT SIGNS
8/17/2021	R22-01010	P22-00645	KELLY CLEANING & SUPPLIES	\$280.00	RHS CLEANING KITCHEN/PORTABLE MPR
8/26/2021	R22-01157	P22-01041	DAGAN SALES & MARKETING INC.	\$1,240.33	RHS MPR SWEATSHIRTS
9/9/2021	R22-01305	P22-01217	MISSION PAVING & SEALING, INC	\$4,500.00	SICE MOTORCYCLE TRAINING COURSE STRIPING
9/10/2021	R22-01330	P22-01136	RLD FIRE PROTECTION	\$1,500.00	FIRE FLOW TESTING FOR ROYAL HS MPR
9/21/2021	R22-01465	P22-01164	A AND S FIRE PROTECTION, INC.	\$950.00	SVHS FLOW TEST BOYS LOCKER RM
9/29/2021	R22-01604	P22-01235	EMPIRE CABLING, INC.	\$769.21	RHS CABLING PE OFFICE
10/4/2021	R22-01662	P22-01481	FENCE FACTORY	\$6,840.45	SVHS MPR TEMPORARY SITE FENCING
10/4/2021	R22-01673	P22-01482	EMPIRE CABLING, INC.	\$4,062.35	SVHS INSTALL PA SPEAKERS IN PORTABLE BLDGS.
10/11/2021	R22-01797	P22-01402	GO MINI'S OF VENTURA CNTY	\$80.44	GG RELOCATE UNIT PAVING
10/11/2021	R22-01812	P22-01403	VENCO WESTERN INC.	\$324.00	ARROYO LANDSCAPE SEC/FENCE/LS
10/13/2021	R22-01837	P22-01497	IMPERIAL SPRINKLER SUPPLY, INC	\$39.81	ARROYO STAKE SEC/FENCE/LS
10/13/2021	R22-01840	P22-01485	SALINAS & SONS ROOTER SERVICE	\$595.00	HMS DRAIN CLEAR CLASS RENO
10/13/2021	R22-01852	P22-01543	CHALMERS CONSTRUCTION SERVICE	\$2,362.56	HMS FURNITURE MOVE CLASS RENO
10/14/2021	R22-01865	P22-01487	ANIXTER INC.	\$1,226.36	RHS HARDWARE BOYS LOCKER
10/21/2021	R22-01958	P22-02555	INFINITY COMMUN & CONSULT	\$69,472.43	IT STUDENT DEVICES MGMT FEES
10/22/2021	R22-01959	P22-01783	SALINAS & SONS ROOTER SERVICE	\$5,200.00	ROYAL HS PLAZA COURTYARD IMPROVEMENTS
10/25/2021	R22-01975	P22-01626	INSTITUTION RECYCLING NETWORK	\$3,288.00	SSES FURNITURE REMOVAL
10/25/2021	R22-01978	P22-01930	AGOSTI'S MOVING & STORAGE	\$5,628.95	SSES FURNITURE MOVE CLASS RENO
10/27/2021	R22-02017	P22-02118	EMPIRE CABLING, INC.	\$1,300.00	HMS CABLING CLASS RENO
11/1/2021	R22-02047	P22-01956	MOLLENHAUER GROUP	\$57,175.00	SSH'S UTILITY DETECTION BLACK BOX
11/8/2021	R22-02153	P22-01982	EMPIRE CABLING, INC.	\$3,573.28	ROYAL HS MPR BUILDING RENOVATIONS
11/15/2021	R22-02217	P22-02616	NATIONAL ROOFING CONSULTANTS	\$15,150.00	SVHS ROOF INSPECTION MPR
11/17/2021	R22-02253	P22-01937	GULDMANN, INC.	\$5,641.77	KNOLLS RESTROOM UPGRADE CLASS RENO
11/22/2021	R22-02294	P22-01986	A AND S FIRE PROTECTION, INC.	\$1,850.00	SVHS FIRE HYDRANT FLOW TEST (2 TOTAL)
12/3/2021	R22-02369	P22-02179	SIGNARAMA SIMI VALLEY	\$3,348.99	RHS SIGNS MPR MODULAR BLDG
12/10/2021	R22-02458	P22-02241	CLARK SEIF CLARK, INC.	\$1,580.40	SVHS LOR CLASS RENO
12/17/2021	R22-02553	P22-02247	EMPIRE CABLING, INC.	\$2,000.00	RHS PA CABLING MPR
1/13/2022	R22-02678	P22-02376	CLARK SEIF CLARK, INC.	\$1,880.40	SVHS ENV TEST CLASS RENO
2/2/2022	R22-02929	P22-02636	HUGHES GENERAL ENGINEERING	\$500.00	SVHS UTILITY EXCAVATION MPR
2/2/2022	R22-02937	P22-02637	JORDAN GILBERT & BAIN	\$5,000.00	VVMS ARCHITECT SITE IMP
2/4/2022	R22-02980	P22-02693	KELLY CLEANING & SUPPLIES	\$945.00	RHS CLEANING KITCHEN MPR
			TOTAL FIELD CONTRACTS/AGM 8/9/2021-3/6/2022	\$ 253,187.63	

EXHIBIT "A"



TITLE: APPROVAL OF AGREEMENT NO. R22-03653 BETWEEN SIMI VALLEY UNIFIED SCHOOL DISTRICT AND KNOWLAND CONSTRUCTION SERVICES, INC. FOR INSPECTION SERVICES FOR THE QUAD RENOVATION PROJECT AT SIMI VALLEY HIGH SCHOOL

Business & Facilities
Consent #11

April 19, 2022
Page 1 of 1

Prepared by: Ron Todo, Associate Superintendent
Business & Facilities

Background Information

The District requires inspection services on an as-needed basis for the quad renovation project at Simi Valley High School. The Bond Management Office interviewed inspectors from four firms on the list of selected firms approved by the Board of Education on December 12, 2017. The firm of Knowland Construction Services, Inc. is on the list and has proposed an inspector who has the qualifications and experience required for this project.

Fiscal Analysis

Project

Estimated Cost

Simi Valley HS Quad Renovation Project

\$106,624.00

Actual cost will be based on actual inspection services performed. Said Agreement is attached as Exhibit "A". These services are based on a billing rate of \$98.00 per hour, and will be funded by Measure X.

Recommendation

It is recommended that the Board of Education approve Agreement No. R22-03653 Between Simi Valley Unified School District and Knowland Construction Services, Inc. for Inspection Services for Simi Valley HS Quad Renovation Project.

On a motion # 157a by Trustee Smollen, seconded by Trustee Bagdasaryan and carried by a vote of 5/0, the Board of Education approved, by roll-call-vote, Agreement No. R22-03653 Between Simi Valley Unified School District and Knowland Construction Services, Inc. for Inspection Services for the Simi Valley HS Quad Renovation Project.

Ayes: Labran LaBelle Smollen Bagdasaryan Blough Noes: 0 Absent: 0 Abstained: 0

**AGREEMENT FOR ON-GOING PROJECT INSPECTOR SERVICES
PROJECT ASSIGNMENT AMENDMENT**

Simi Valley HS – Quad Renovation

AGREEMENT R22-03653

This Project Assignment Amendment ("PAA") is entered by and between Simi Valley Unified School District and Knowland Construction Services, Inc. ("Inspector Firm") as of April 19, 2022.

WHEREAS, the District and Inspector Firm entered into a written Agreement entitled Agreement No. A22.088 for On-Going Project Inspector Services ("Agreement") generally establishing terms and conditions for the Project Inspector's inspection services for Projects assigned by the District to the Inspector Firm for completion of Project Inspector Services.

WHEREAS, this PAA sets forth the specific terms and conditions applicable to the Assigned Project and the Project Inspector Services to be completed by the Inspector Firm for the Assigned Project.

NOW THEREFORE, the District and Project Inspector agree as follows:

1. Assigned Project Description. The Assigned Project is described as follows: Provision of a Inspector for the Sim Valley High School Quad Renovation Project. The Inspector shall be assigned by Knowland Construction Services, Inc. to the project for the duration of the Project, unless another inspector is requested by the District. The inspector is to remain consistent throughout the project and cannot be replaced without approval from the District.
2. Project Inspector Services for Assigned Project. The Inspector Firm shall complete all Project Inspector Services for the Assigned Project set forth in the Agreement, including but not limited to: Preconstruction services, Phases Schematic through Project Closeout.
3. Project Inspector. The Inspector Firm designates one of the following the Project Inspectors: Dan Alberico, Keith Devine or Wayne Quier, for completion of Project Inspector Services for the Assigned Project. The Inspectors cannot be interchanged. The Inspector assigned will remain through the duration of the project. The Project Inspector must pass DOJ fingerprinting requirements identified in California Education Code Section 45125.1. The hourly billing rate for the Project Inspector designated for the Assigned Project is set forth in Attachment 1 to this PAA and is not subject to adjustment, and includes all projected costs related to AB-5, which became effective beginning on January 1, 2020. The billing is to be monthly.
4. Assigned Project Contract Price. The Contract Price for completing Project Inspector Services for the Assigned Project is an **estimated One-Hundred and Six Thousand, Six-Hundred Twenty-Four Dollars (\$106,624.00)** ("Assigned Project Contract Price") per the attached Proposal from Inspector Firm dated March 17, 2022 (Attachment 2- For Fee Only). Billings for payment of the Assigned Project Contract Price shall be based on the actual and reasonable time necessary for the Project Inspector designated for the Assigned Project to complete Project Inspector Services, multiplied by the applicable hourly rate. Billings for Project Inspector Services shall be at the Straight Time hourly rates, unless the District has authorized in advance the completion of Project Inspector Services on days/times subject to Overtime or Premium Overtime hourly rates. No payment will be made and the Inspector Firm is not entitled to any compensation for any Project Inspector Services necessary as a result of the failure of the Inspector Firm to timely and completely provide Project Inspector Services. The Assigned Project Contract Price is not subject to adjustment, except as provided in Paragraph 5 of this PAA.

5. Term of PAA. The District has established the project schedule as follows: (Quad Designations per Jordan Gilbert Bain Schematic Plans)

- L-1 – Front of Administration and Library Bldgs.: Preconstruction start April 20, 2022, Construction estimated start date June 6, 2022, completion estimated August 4, 2022.
- L-2.53 – Shade Structure area Preconstruction start April 20, 2022, Construction estimated start date June 6, 2022, completion estimated August 4, 2022.
- L-2.51 – Clock Tower area: Preconstruction start April 20, 2022, Construction estimated start date August 11, 2022, completion estimated November, 2022.
- L-2.4 Rose Bush area: Preconstruction start April 20, 2022, Construction estimated start date November, 2022, completion estimated January 2023.
- L-2.1 – Main Quad: Preconstruction start April 20, 2022, Construction estimated start date November, 2022, completion estimated March 2023.

Schedule subject to change.

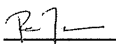
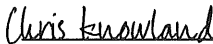
The actual start date for these inspection services will be based on the successful bid and award of the project. The Assigned Project Contract Price is based on the Construction Duration of the Assigned Project. If Project construction is not completed within the Construction Time and the Assigned Project Contract Price is not exhausted as of expiration of the Construction Time, the Inspector shall provide Project Inspector Services after expiration of the Construction Time without adjustment of the Assigned Project Contract Price until the Assigned Project Contract Price is exhausted. If Project construction is not completed within the Construction Time and the Assigned Project Contract Price is exhausted at the expiration of the Construction Time, or if the unexhausted portion of the Assigned Project Contract Price as of expiration of the Construction Time is exhausted prior to completion of Project Construction, the Assigned Project Contract Price is subject to adjustment by the District, for the Project Inspector Services provided after expiration of the Construction Time.

6. Agreement Terms. All terms of the Agreement for Ongoing Services A22.088 are incorporated herein and applicable to the Assigned Project, except as modified by the terms of this PAA.

IN WITNESS HEREOF, the District and the Architect have executed this Project Assignment Amendment as of the date set forth above.

District
Simi Valley Unified School District

“INSPECTOR FIRM”
Knowland Construction Services, Inc.

<p>By: <u></u> 4/20/2022 9:09 AM PDT Ron Todo Associate Superintendent, Business & Facilities</p>	<p>By: <u></u> 3/31/2022 10:37 AM PDT Christopher Knowland President</p>
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DR

ATTACHEMENT 1
AGREEMENT A22.088
PROJECT ASSIGNMENT AMENDMENT FOR PROJECT INSPECTOR SERVICES, R22-03653
PROJECT: Simi Valley HS – Quad Renovation

Project Inspector (Knowland Construction Services, Inc. to designate below)	DSA Certification No.	Hourly Billing Rate
		Straight Time Mondays-Fridays (8 hour work day) \$98.00
		Overtime (authorization by District in advance required) Mondays-Fridays (more than 8 hours per work day) Saturdays (8 hour workday 7 AM to 6 PM) TBD
		Premium Overtime (authorization by District in advance required) Saturdays (more than 8 hours per work day) Sundays Holidays TBD

Attachment 2 - Fee Only

Knowland Construction Services

March 17, 2022

PROPOSAL FOR PROJECT INSPECTORS

SCHOOL DISTRICT: Simi Valley Unified School District

INSPECTORS: Wayne Quier / Dan Alberico / Keith Devine (or other IOR / PE as approved)

PROJECT: Simi Valley High School
Quad Projects

DURATION: June 1, 2022 – September 30, 2023
(and per Exhibit A Attached Herein)

RATE: DSA Class I \$98.00/hour
DSA Class 2 \$88.00/hour
DSA Class 3 \$82.00/hour
Project Eng. \$68.00-\$72.00

TOTAL ESTIMATE: 16 months / 522 hrs.: \$106,624.00

Additional Compensation: Option for Preconstruction Services from 3/15/2022-5/31/2022
NTE \$6,566.00

PROJECT INSPECTOR AGENCY AGREEMENT AND CONTRACT DUTIES:

1. Knowland Construction Services agrees to provide for continuous inspection of work for compliance with approved contract documents. Project Inspector duties as outlined in Title 24, Part 1, Chapter 4, Sections 4-333 thru 4-342 California Code of Regulations, including DSA Interpretive Regulations A-6, A-7, A-8, and as incorporated in the following paragraphs.
2. Represent the District under the guidance of the designee of the District Superintendent.
3. Attend all planning, pre-construction conference, project meetings, or meetings as required by the District.
4. Monitor and observe all Special Inspections performed by the Districts contracted Testing Lab as required by the Testing and Inspections Sheet and as outlined in the Project Specifications. Maintain and update a log specifying hours spent on the project by Special Inspectors. Perform or monitor testing for Torque, Epoxy, Pull Tests and other tests as approved by the DSA Field Engineer. Knowland Construction Services shall assist in minimizing unnecessary costs for testing where possible.
5. The District & the Inspector, Knowland Construction Services, shall each defend and hold harmless each other against any losses, liabilities, damages, injuries, claims, costs, or

expenses arising out of, or connected with the provisions of this agreement and the contract documents.

6. The Agreement shall begin upon written notice by a representative of the District and remain in effect continuously until project closeout, unless terminated in writing. Contract is intended to be an agency agreement and may be terminated in 15 days by either party with or without cause. This Agency Agreement shall be assignable to other schools within the District, and shall apply to other Inspectors as requested and approved by the District. The District shall not employ, contract, or engage in business or mutually beneficial relationships with Inspectors introduced to the District through Knowland Construction Services for a period of two (2) years after the dissolution of any contracts through Knowland Construction Services unless permission is granted prior to such relationships.
7. Knowland Construction Services shall maintain in effect a \$2 million General Liability insurance policy, Workman's Compensation as required, and Full Liability Auto Insurance as required. District requests for additional insurances shall be paid additionally by the District at current market rates.
8. Simi Valley Unified School District agrees to pay Knowland Construction Services the cost of project services billed at the rate as outlined in the fee schedule within 30 working days of receipt of invoice. Knowland Construction Services (Project Inspectors / Project Managers/Engineers) shall provide all necessary cell phones, laptop computers, digital cameras, and equipment necessary to maintain proper documentation and administrative functions throughout the duration of the project. KCS shall provide all utility lines, office space and furniture on an off-site location. KCS at it's own discretion may utilize project managers or project engineers to perform administrative, report writing, DSA Box, and other duties where it is in the interest of the project.
9. When an IOR is on vacation or unable to be at the project for reasons beyond his reasonable control, a Project Manager / Project Engineer will be assigned to oversee the project, and shall be responsible for the accurate reporting of all activities to the Inspector of Record. Hours billed for inspection services shall include only hours worked in support of the project. Other billing arrangements may be as agreed in writing by the District.

Christopher Knowland

Christopher Knowland – KCS
Knowland Construction Services

Agent – Simi Valley Unified School District

Certificate Of Completion

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Status: Completed

Subject: Please DocuSign: R22-03653 - SVHS Quad Renovations Inspection.pdf

Source Envelope:

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Signatures: 2

Envelope Originator:

Certificate Pages: 5

Initials: 1

Bond Contracts

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bondcontracts@simivalleyusd.org

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Record Tracking

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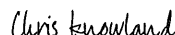
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Signer Events**Signature****Timestamp**

Chris Knowland

chrisk@knowlandinc.com

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Signature Adoption: Pre-selected Style

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Desiree Rask

desiree.rask@simivalleyusd.org

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desiree.rask@simivalleyusd.org

Using IP Address: 207.157.143.2

Electronic Record and Signature Disclosure:

Not Offered via DocuSign

Ron Todo

ron.todo@simivalleyusd.org

Simi Valley Unified School District - Facilities

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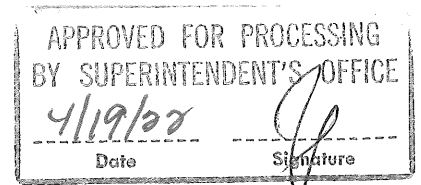
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Electronic Record and Signature Disclosure		



TITLE: APPROVAL OF AGREEMENT NO. R22-03654 BETWEEN SIMI VALLEY UNIFIED SCHOOL DISTRICT AND KNOWLAND CONSTRUCTION SERVICES, INC. FOR INSPECTION SERVICES FOR THE QUAD RENOVATION PROJECT AT ROYAL HIGH SCHOOL

Business & Facilities
Consent #12

April 19, 2022
Page 1 of 1

Prepared by: Ron Todo, Associate Superintendent
Business & Facilities

Background Information

The District requires inspection services on an as-needed basis for the quad renovation project at Simi Valley High School. The Bond Management Office interviewed inspectors from four firms on the list of selected firms approved by the Board of Education on December 12, 2017. The firm of Knowland Construction Services, Inc. is on the list and has proposed an inspector who has the qualifications and experience required for this project.

Fiscal Analysis

Project

Estimated Cost

Royal HS Quad Renovation Project

\$86,436.00

Actual cost will be based on actual inspection services performed. Said Agreement is attached as Exhibit "A". These services are based on a billing rate of \$98.00 per hour, and will be funded by Measure X.

Recommendation

It is recommended that the Board of Education approve Agreement No. R22-03654 Between Simi Valley Unified School District and Knowland Construction Services, Inc. for Inspection Services for Royal HS Quad Renovation Project.

On a motion # 157a by Trustee Smollen, seconded by Trustee Bagdasarian and carried by a vote of 5/0, the Board of Education approved, by roll-call-vote, Agreement No. R22-03654 Between Simi Valley Unified School District and Knowland Construction Services, Inc. for Inspection Services for the Royal HS Quad Renovation Project.

Ayes: Ju Brian
LaBelle Noes: 0 Absent: 0 Abstained: 0
Smollen

**AGREEMENT FOR ON-GOING PROJECT INSPECTOR SERVICES
PROJECT ASSIGNMENT AMENDMENT**

Royal HS – Quad Renovation

AGREEMENT R22-03654

This Project Assignment Amendment (“PAA”) is entered by and between Simi Valley Unified School District and Knowland Construction Services, Inc. (“Inspector Firm”) as of April 19, 2022.

WHEREAS, the District and Inspector Firm entered into a written Agreement entitled Agreement No. A22.088 for On-Going Project Inspector Services (“Agreement”) generally establishing terms and conditions for the Project Inspector’s inspection services for Projects assigned by the District to the Inspector Firm for completion of Project Inspector Services.

WHEREAS, this PAA sets forth the specific terms and conditions applicable to the Assigned Project and the Project Inspector Services to be completed by the Inspector Firm for the Assigned Project.

NOW THEREFORE, the District and Project Inspector agree as follows:

1. Assigned Project Description. The Assigned Project is described as follows: Provision of a Inspector for the Royal High School Quad Renovation Project. The Inspector shall be assigned by Knowland Construction Services, Inc. to the project for the duration of the Royal High School Quad Renovation Project, unless another inspector is requested by the District. The inspector is to remain consistent throughout the project and cannot be replaced without approval from the District.
2. Project Inspector Services for Assigned Project. The Inspector Firm shall complete all Project Inspector Services for the Assigned Project set forth in the Agreement, including but not limited to: Preconstruction services, Phases Schematic through Project Closeout.
3. Project Inspector. The Inspector Firm designates one of the following the Project Inspectors: Dan Alberico, Keith Devine or Wayne Quier, for completion of Project Inspector Services for the Assigned Project. The Inspectors cannot be interchanged. The Inspector assigned will remain through the duration of the project. The Project Inspector must pass DOJ fingerprinting requirements identified in California Education Code Section 45125.1. The hourly billing rate for the Project Inspector designated for the Assigned Project is set forth in Attachment 1 to this PAA and is not subject to adjustment, and includes all projected costs related to AB-5, which became effective beginning on January 1, 2020. The billing is to be monthly.
4. Assigned Project Contract Price. The Contract Price for completing Project Inspector Services for the Assigned Project is an **estimated Eighty-Six Thousand, Four-Hundred Thirty-Six Dollars (\$86,436.00)** (“Assigned Project Contract Price”) per the attached Proposal from Inspector Firm dated March 17, 2022 (Attachment 2- For Fee Only). Billings for payment of the Assigned Project Contract Price shall be based on the actual and reasonable time necessary for the Project Inspector designated for the Assigned Project to complete Project Inspector Services, multiplied by the applicable hourly rate. Billings for Project Inspector Services shall be at the Straight Time hourly rates, unless the District has authorized in advance the completion of Project Inspector Services on days/times subject to Overtime or Premium Overtime hourly rates. No payment will be made and the Inspector Firm is not entitled to any compensation for any Project Inspector Services necessary as a result of the failure of the Inspector Firm to timely and completely provide Project Inspector Services. The Assigned Project Contract Price is not subject to adjustment, except as provided in Paragraph 5 of this PAA.

5. Term of PAA. The District has established the project schedule as follows: (Quad Designations per Jordan Gilbert Bain Schematic Plans)

- L-2 – East area: Preconstruction start April 20, 2022, Construction estimated start date June 6, 2022, completion estimated October 2022.
- L-2, L-4, L-5 – West area: Preconstruction start April 20, 2022, Construction estimated start date October 2022, completion estimated February 2023.

Schedule subject to change.

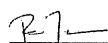

The actual start date for these inspection services will be based on the successful bid and award of the project. The Assigned Project Contract Price is based on the Construction Duration of the Assigned Project. If Project construction is not completed within the Construction Time and the Assigned Project Contract Price is not exhausted as of expiration of the Construction Time, the Inspector shall provide Project Inspector Services after expiration of the Construction Time without adjustment of the Assigned Project Contract Price until the Assigned Project Contract Price is exhausted. If Project construction is not completed within the Construction Time and the Assigned Project Contract Price is exhausted at the expiration of the Construction Time, or if the unexhausted portion of the Assigned Project Contract Price as of expiration of the Construction Time is exhausted prior to completion of Project Construction, the Assigned Project Contract Price is subject to adjustment by the District, for the Project Inspector Services provided after expiration of the Construction Time.

6. Agreement Terms. All terms of the Agreement for Ongoing Services A22.088 are incorporated herein and applicable to the Assigned Project, except as modified by the terms of this PAA.

IN WITNESS HEREOF, the District and the Architect have executed this Project Assignment Amendment as of the date set forth above.

District
Simi Valley Unified School District

"INSPECTOR FIRM"
Knowland Construction Services, Inc.

<p>By: <u></u> 4/20/2022 9:08 AM PDT Ron Todo Associate Superintendent, Business & Facilities</p>	<p>By: <u></u> 3/31/2022 10:36 AM PDT Christopher Knowland President</p>
---	--

Dr

ATTACHEMENT 1
AGREEMENT A22.088
PROJECT ASSIGNMENT AMENDMENT FOR PROJECT INSPECTOR SERVICES, R22-03654

PROJECT: Simi Valley HS – Quad Renovation

Project Inspector (Knowland Construction Services, Inc. to designate below)	DSA Certification No.	Hourly Billing Rate	
		Straight Time Mondays-Fridays (8 hour work day)	\$98.00
		Overtime (authorization by District in advance required) Mondays-Fridays (more than 8 hours per work day) Saturdays (8 hour workday 7 AM to 6 PM)	TBD
		Premium Overtime (authorization by District in advance required) Saturdays (more than 8 hours per work day) Sundays Holidays	TBD

Attachment 2 - Fee Only

Knowland Construction Services

March 17, 2022

PROPOSAL FOR PROJECT INSPECTORS

SCHOOL DISTRICT: Simi Valley Unified School District

INSPECTORS: Wayne Quier / Dan Alberico / Keith Devine (or other IOR / PE as approved)

PROJECT: Royal High School
QUAD PROJECTS

DURATION: June 1, 2022 – June 30, 2023
And per Exhibit A Attached Herein

RATE: DSA Class 1 \$98.00/hour
DSA Class 2 \$88.00/hour
DSA Class 3 \$82.00/hour
Project Eng. \$68.00

TOTAL ESTIMATE: 14 months /882 hrs.: \$86,436.00

Additional Compensation: Option for Preconstruction Services from 3/15/2022-4/30/2022
NTE \$3,920.00

PROJECT INSPECTOR AGENCY AGREEMENT AND CONTRACT DUTIES:

1. Knowland Construction Services agrees to provide for continuous inspection of work for compliance with approved contract documents. Project Inspector duties as outlined in Title 24, Part 1, Chapter 4, Sections 4-333 thru 4-342 California Code of Regulations, including DSA Interpretive Regulations A-6, A-7, A-8, and as incorporated in the following paragraphs.
2. Represent the District under the guidance of the designee of the District Superintendent.
3. Attend all planning, pre-construction conference, project meetings, or meetings as required by the District.
4. Monitor and observe all Special Inspections performed by the Districts contracted Testing Lab as required by the Testing and Inspections Sheet and as outlined in the Project Specifications. Maintain and update a log specifying hours spent on the project by Special Inspectors. Perform or monitor testing for Torque, Epoxy, Pull Tests and other tests as approved by the DSA Field Engineer. Knowland Construction Services shall assist in minimizing unnecessary costs for testing where possible.
5. The District & the Inspector, Knowland Construction Services, shall each defend and hold harmless each other against any losses, liabilities, damages, injuries, claims, costs, or

expenses arising out of, or connected with the provisions of this agreement and the contract documents.

6. The Agreement shall begin upon written notice by a representative of the District and remain in effect continuously until project closeout, unless terminated in writing. Contract is intended to be an agency agreement and may be terminated in 15 days by either party with or without cause. This Agency Agreement shall be assignable to other schools within the District, and shall apply to other Inspectors as requested and approved by the District. The District shall not employ, contract, or engage in business or mutually beneficial relationships with Inspectors introduced to the District through Knowland Construction Services for a period of two (2) years after the dissolution of any contracts through Knowland Construction Services unless permission is granted prior to such relationships.
7. Knowland Construction Services shall maintain in effect a \$2 million General Liability insurance policy, Workman's Compensation as required, and Full Liability Auto Insurance as required. District requests for additional insurances shall be paid additionally by the District at current market rates.
8. Simi Valley Unified School District agrees to pay Knowland Construction Services the cost of project services billed at the rate as outlined in the fee schedule within 30 working days of receipt of invoice. Knowland Construction Services (Project Inspectors / Project Managers/Engineers) shall provide all necessary cell phones, laptop computers, digital cameras, and equipment necessary to maintain proper documentation and administrative functions throughout the duration of the project. KCS shall provide all utility lines, office space and furniture on an off-site location. KCS at it's own discretion may utilize project managers or project engineers to perform administrative, report writing, DSA Box, and other duties where it is in the interest of the project.
9. When an IOR is on vacation or unable to be at the project for reasons beyond his reasonable control, a Project Manager / Project Engineer will be assigned to oversee the project, and shall be responsible for the accurate reporting of all activities to the Inspector of Record. Hours billed for inspection services shall include only hours worked in support of the project. Other billing arrangements may be as agreed in writing by the District.

Christopher Knowland

Christopher Knowland – KCS
Knowland Construction Services

Agent – Simi Valley Unified School District

Certificate Of Completion

Envelope Id: 75EB92FE90F84969B8A70ADCF14BA2F7

Status: Completed

Subject: Please DocuSign: R22-03654 - Royal Quad Renovations Inspection.pdf

Source Envelope:

Document Pages: 5

Signatures: 2

Envelope Originator:

Certificate Pages: 5

Initials: 1

Bond Contracts

AutoNav: Enabled

bondcontracts@simivalleyusd.org

EnvelopeId Stamping: Enabled

IP Address: 207.157.143.39

Time Zone: (UTC-08:00) Pacific Time (US & Canada)

Record Tracking

Status: Original

Holder: Bond Contracts

Location: DocuSign

3/24/2022 11:16:21 AM

bondcontracts@simivalleyusd.org

Security Appliance Status: Connected

Pool: StateLocal

Storage Appliance Status: Connected

Pool: Simi Valley Unified School District - Facilities Location: DocuSign

Signer Events**Signature****Timestamp**

Chris Knowland

chrisk@knowlandinc.com

Security Level: Email, Account Authentication
(None)

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Resent: 3/31/2022 9:12:02 AM

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Signature Adoption: Pre-selected Style

Signed by link sent to chrisk@knowlandinc.com

Using IP Address: 47.156.236.10

Electronic Record and Signature Disclosure:

Accepted: 3/31/2022 10:36:07 AM

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Desiree Rask

desiree.rask@simivalleyusd.org

Security Level: Email, Account Authentication
(None)

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Signed: 4/20/2022 8:59:57 AM

Signature Adoption: Pre-selected Style

Signed by link sent to

desiree.rask@simivalleyusd.org

Using IP Address: 207.157.143.2

Electronic Record and Signature Disclosure:

Not Offered via DocuSign

Ron Todo

ron.todo@simivalleyusd.org

Simi Valley Unified School District - Facilities

Security Level: Email, Account Authentication
(None)

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Viewed: 4/20/2022 9:08:21 AM

Signed: 4/20/2022 9:08:34 AM

Signature Adoption: Uploaded Signature Image

Signed by link sent to ron.todo@simivalleyusd.org

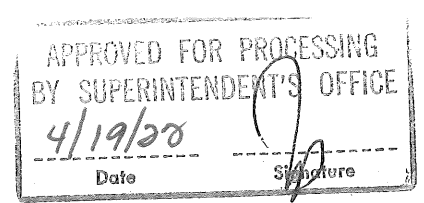
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Electronic Record and Signature Disclosure:

Not Offered via DocuSign

In Person Signer Events**Signature****Timestamp****Editor Delivery Events****Status****Timestamp****Agent Delivery Events****Status****Timestamp**

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Certified Delivery Events	Status	Timestamp
Carbon Copy Events	Status	Timestamp
Witness Events	Signature	Timestamp
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Signing Complete	Security Checked	4/20/2022 9:08:34 AM
Completed	Security Checked	4/20/2022 9:08:34 AM
Payment Events	Status	Timestamps
Electronic Record and Signature Disclosure		



TITLE: APPROVAL OF AGREEMENT NO. R22-03655 BETWEEN SIMI VALLEY UNIFIED SCHOOL DISTRICT AND KNOWLAND CONSTRUCTION SERVICES, INC. FOR INSPECTION SERVICES FOR THE INTERIM PORTABLE RESTROOM PROJECT AT SIMI VALLEY HIGH SCHOOL

Business & Facilities
Consent #13

April 19, 2022
Page 1 of 1

Prepared by: Ron Todo, Associate Superintendent
Business & Facilities

Background Information

Inspection services are required by DSA on an as-needed basis for the Interim Portable Restroom project at Simi Valley High School. The Bond Management Office interviewed inspectors from four firms on the list of selected firms approved by the Board of Education on December 12, 2017. The firm of Knowland Construction Services, Inc. is on the list and has proposed an inspector who has the qualifications and experience required for this project.

Fiscal Analysis

Project

Estimated Cost

Simi Valley HS Interim Portable Restroom Project

\$6,468.00

Actual cost will be based on actual inspection services performed. Said Agreement is attached as Exhibit "A". These services are based on a billing rate of \$98.00 per hour, and will be funded by Measure X.

Recommendation

It is recommended that the Board of Education approve Agreement No. R22-03655 Between Simi Valley Unified School District and Knowland Construction Services, Inc. for Inspection Services for Simi Valley HS Interim Portable Restroom Project.

On a motion # 157a by Trustee Smollen, seconded by Trustee Bagdasaryan and carried by a vote of 5/0, the Board of Education approved, by roll-call-vote, Agreement No. R22-03655 Between Simi Valley Unified School District and Knowland Construction Services, Inc. for Inspection Services for the Simi Valley HS Interim Portable Restroom Project.

Ayes: Jubran
LaBelle
Smollen
Bagdasaryan
Blough Noes: 0 Absent: 0 Abstained: 0

**AGREEMENT FOR ON-GOING PROJECT INSPECTOR SERVICES
PROJECT ASSIGNMENT AMENDMENT**

Simi Valley HS – Interim Portable Restroom Project

AGREEMENT R22-03655

This Project Assignment Amendment ("PAA") is entered by and between Simi Valley Unified School District and Knowland Construction Services, Inc. ("Inspector Firm") as of April 19, 2022.

WHEREAS, the District and Inspector Firm entered into a written Agreement entitled Agreement No. A22.088 for On-Going Project Inspector Services ("Agreement") generally establishing terms and conditions for the Project Inspector's inspection services for Projects assigned by the District to the Inspector Firm for completion of Project Inspector Services.

WHEREAS, this PAA sets forth the specific terms and conditions applicable to the Assigned Project and the Project Inspector Services to be completed by the Inspector Firm for the Assigned Project.

NOW THEREFORE, the District and Project Inspector agree as follows:

1. Assigned Project Description. The Assigned Project is described as follows: Provision of a Class 1 DSA Inspector for the Simi Valley High School Interim Portable Restroom Project, and for inspection of other projects as allowed by DSA. The Class 1 DSA Inspector shall be assigned by Knowland Construction Services, Inc to the project for the duration of the Project, unless another Class 1 inspector is requested by the District.
2. Project Inspector Services for Assigned Project. The Inspector Firm shall complete all Project Inspector Services for the Assigned Project set forth in the Agreement, including but not limited to: Preconstruction services, Phases Schematic through Project Closeout.
3. Project Inspector. The Inspector Firm designates one of the following the Project Inspectors: Dan Alberico, Keith Devine or Wayne Quier, for completion of Project Inspector Services for the Assigned Project. The Inspectors cannot be interchanged. The Inspector assigned will remain through the duration of the project. The Project Inspector must pass DOJ fingerprinting requirements identified in California Education Code Section 45125.1. The hourly billing rate for the Project Inspector designated for the Assigned Project is set forth in Attachment 1 to this PAA and is not subject to adjustment, and includes all projected costs related to AB-5, which became effective beginning on January 1, 2020. The billing is to be monthly.
4. Assigned Project Contract Price. The Contract Price for completing Project Inspector Services for the Assigned Project is an **estimated Six Thousand, Four-Hundred Sixty-Eight Dollars (\$6,468.00)** ("Assigned Project Contract Price") per the attached Proposal from Inspector Firm dated March 17, 2022 (Attachment 2- For Fee Only). Billings for payment of the Assigned Project Contract Price shall be based on the actual and reasonable time necessary for the Project Inspector designated for the Assigned Project to complete Project Inspector Services, multiplied by the applicable hourly rate. Billings for Project Inspector Services shall be at the Straight Time hourly rates, unless the District has authorized in advance the completion of Project Inspector Services on days/times subject to Overtime or Premium Overtime hourly rates. No payment will be made and the Inspector Firm is not entitled to any compensation for any Project Inspector Services necessary as a result of the failure of the Inspector Firm to timely and completely provide Project Inspector Services. The Assigned Project Contract Price is not subject to adjustment, except as provided in Paragraph 5 of this PAA.

5. Term of PAA. The District has established the project schedule as follows:

- Preconstruction start April 20, 2022, Construction estimated start date June 6, 2022, completion estimated September 2022.

Schedule subject to change.

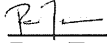
The actual start date for these inspection services will be based on the successful bid and award of the project. The Assigned Project Contract Price is based on the Construction Duration of the Assigned Project. If Project construction is not completed within the Construction Time and the Assigned Project Contract Price is not exhausted as of expiration of the Construction Time, the Inspector shall provide Project Inspector Services after expiration of the Construction Time without adjustment of the Assigned Project Contract Price until the Assigned Project Contract Price is exhausted. If Project construction is not completed within the Construction Time and the Assigned Project Contract Price is exhausted at the expiration of the Construction Time, or if the unexhausted portion of the Assigned Project Contract Price as of expiration of the Construction Time is exhausted prior to completion of Project Construction, the Assigned Project Contract Price is subject to adjustment by the District, for the Project Inspector Services provided after expiration of the Construction Time.

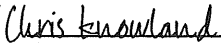
6. Agreement Terms. All terms of the Agreement for Ongoing Services A22.088 are incorporated herein and applicable to the Assigned Project, except as modified by the terms of this PAA.

IN WITNESS HEREOF, the District and the Architect have executed this Project Assignment Amendment as of the date set forth above.

District
Simi Valley Unified School District

"INSPECTOR FIRM"
Knowland Construction Services, Inc.

By:  4/20/2022 | 9:10 AM PDT
Ron Todo
Associate Superintendent,
Business & Facilities

By:  3/31/2022 | 10:38 AM PDT
Christopher Knowland
President

Dr

ATTACHEMENT 1
AGREEMENT A22.088
PROJECT ASSIGNMENT AMENDMENT FOR PROJECT INSPECTOR SERVICES, R22-03655
PROJECT: Simi Valley HS – Interim Portable Restroom Project

Project Inspector (Knowland Construction Services, Inc. to designate below)	DSA Certification No.	Hourly Billing Rate
		Straight Time Mondays-Fridays (8 hour work day) \$98.00
		Overtime (authorization by District in advance required) Mondays-Fridays (more than 8 hours per work day) Saturdays (8 hour workday 7 AM to 6 PM) TBD
		Premium Overtime (authorization by District in advance required) Saturdays (more than 8 hours per work day) Sundays Holidays TBD

Attachment 2 - For Fee Only

Knowland Construction Services

March 17, 2022

PROPOSAL FOR PROJECT INSPECTORS

SCHOOL DISTRICT: Simi Valley Unified School District

INSPECTORS: Wayne Quier / Dan Alberico / Keith Devine (or other IOR / PE as approved)

PROJECT: Simi Valley High School
Interim Housing

DURATION: June 1, 2022 – August 31, 2022
(and per Exhibit A Attached Herein)

RATE: DSA Class I \$98.00/hour
DSA Class 2 \$88.00/hour
DSA Class 3 \$82.00/hour
Project Eng. \$68.00-\$72.00

TOTAL ESTIMATE: 3 months / 66 hrs.: \$6,468.00

Additional Compensation: Option for Preconstruction Services from 3/15/2022-5/31/2022
NTE \$6,566.00

PROJECT INSPECTOR AGENCY AGREEMENT AND CONTRACT DUTIES:

1. Knowland Construction Services agrees to provide for continuous inspection of work for compliance with approved contract documents. Project Inspector duties as outlined in Title 24, Part 1, Chapter 4, Sections 4-333 thru 4-342 California Code of Regulations, including DSA Interpretive Regulations A-6, A-7, A-8, and as incorporated in the following paragraphs.
2. Represent the District under the guidance of the designee of the District Superintendent.
3. Attend all planning, pre-construction conference, project meetings, or meetings as required by the District.
4. Monitor and observe all Special Inspections performed by the Districts contracted Testing Lab as required by the Testing and Inspections Sheet and as outlined in the Project Specifications. Maintain and update a log specifying hours spent on the project by Special Inspectors. Perform or monitor testing for Torque, Epoxy, Pull Tests and other tests as approved by the DSA Field Engineer. Knowland Construction Services shall assist in minimizing unnecessary costs for testing where possible.
5. The District & the Inspector, Knowland Construction Services, shall each defend and hold harmless each other against any losses, liabilities, damages, injuries, claims, costs, or

expenses arising out of, or connected with the provisions of this agreement and the contract documents.

6. The Agreement shall begin upon written notice by a representative of the District and remain in effect continuously until project closeout, unless terminated in writing. Contract is intended to be an agency agreement and may be terminated in 15 days by either party with or without cause. This Agency Agreement shall be assignable to other schools within the District, and shall apply to other Inspectors as requested and approved by the District. The District shall not employ, contract, or engage in business or mutually beneficial relationships with Inspectors introduced to the District through Knowland Construction Services for a period of two (2) years after the dissolution of any contracts through Knowland Construction Services unless permission is granted prior to such relationships.
7. Knowland Construction Services shall maintain in effect a \$2 million General Liability insurance policy, Workman's Compensation as required, and Full Liability Auto Insurance as required. District requests for additional insurances shall be paid additionally by the District at current market rates.
8. Simi Valley Unified School District agrees to pay Knowland Construction Services the cost of project services billed at the rate as outlined in the fee schedule within 30 working days of receipt of invoice. Knowland Construction Services (Project Inspectors / Project Managers/Engineers) shall provide all necessary cell phones, laptop computers, digital cameras, and equipment necessary to maintain proper documentation and administrative functions throughout the duration of the project. KCS shall provide all utility lines, office space and furniture on an off-site location. KCS at it's own discretion may utilize project managers or project engineers to perform administrative, report writing, DSA Box, and other duties where it is in the interest of the project.
9. When an IOR is on vacation or unable to be at the project for reasons beyond his reasonable control, a Project Manager / Project Engineer will be assigned to oversee the project, and shall be responsible for the accurate reporting of all activities to the Inspector of Record. Hours billed for inspection services shall include only hours worked in support of the project. Other billing arrangements may be as agreed in writing by the District.

Christopher Knowland

Christopher Knowland – KCS
Knowland Construction Services

Agent – Simi Valley Unified School District

Certificate Of Completion

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Status: Completed

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Signatures: 2

Envelope Originator:

Certificate Pages: 5

Initials: 1

Bond Contracts

AutoNav: Enabled

bondcontracts@simivalleyusd.org

Envelopeld Stamping: Enabled

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Time Zone: (UTC-08:00) Pacific Time (US & Canada)

Record Tracking

Status: Original

Holder: Bond Contracts

Location: DocuSign

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bondcontracts@simivalleyusd.org

Security Appliance Status: Connected

Pool: StateLocal

Storage Appliance Status: Connected

Pool: Simi Valley Unified School District - Facilities

Location: DocuSign

Signer Events**Signature****Timestamp**

Chris Knowland

chrisk@knowlandinc.com

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(None)

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Signed: 3/31/2022 10:38:12 AM

Signature Adoption: Pre-selected Style

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Electronic Record and Signature Disclosure:

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Desiree Rask

desiree.rask@simivalleyusd.org

Security Level: Email, Account Authentication
(None)

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Signature Adoption: Pre-selected Style

Signed by link sent to

desiree.rask@simivalleyusd.org

Using IP Address: 207.157.143.2

Electronic Record and Signature Disclosure:

Not Offered via DocuSign

Ron Todo

ron.todo@simivalleyusd.org

Simi Valley Unified School District - Facilities

Security Level: Email, Account Authentication
(None)

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Signature Adoption: Uploaded Signature Image

Signed by link sent to ron.todo@simivalleyusd.org

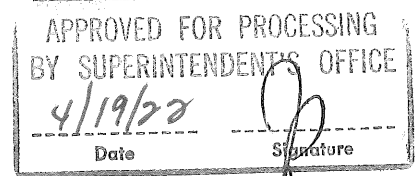
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Electronic Record and Signature Disclosure		



TITLE: AUTHORIZATION OF BLANKET APPROVAL FOR CONTRACT CHANGE ORDERS NOT TO EXCEED STATUTORY LIMITS FOR SUMMER SCHOOL CONSTRUCTION WORK

Business & Facilities
Consent #15

April 19, 2022
Page 1 of 1

Prepared by: Ron Todo, Associate Superintendent
Business & Facilities

Background Information

Pursuant to Public Contract Code 20118.4, the Board of Education may authorize changes to Public Works Contracts without the formality of securing bids if the cost does not exceed ten percent of the original contract price or the legal bid limit of \$15,000, whichever amount is greater.

Normal practice is to present all contractual changes which fall under these parameters to the Board of Education for approval as they occur. However, the brief time frame allocated for summer work and the summer schedule of board meetings impacts the ability of the Division of Facilities, Bond Management Office, and Purchasing Department to authorize payments for work performed on a timely basis. Payments for work completed as the result of a change order can take six to eight weeks to process because warrants cannot be generated without Board of Education approval. This delay affects the manner in which the General Contractor issues payment to subcontractors, many of which are local businesses, and can affect the quality of bids received in the future.

It is therefore requested that the Board of Education provide blanket authorization to the Division of Facilities, Bond Management Office, and Purchasing Department to process change orders which do not exceed the statutory limits set forth in Public Contract Code 20118.4. This authorization would be granted only for the period of June 8, 2022 to August 19, 2022.

Fiscal Analysis

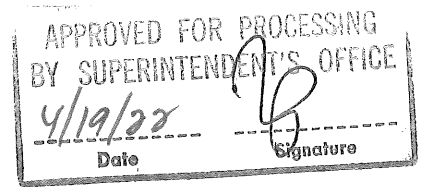
Change orders, if required, cannot exceed the statutory limit of ten percent of contract value or \$15,000 (whichever amount is greater) under this authorization.

Recommendation

It is recommended that the Board of Education authorize the blanket approval of contractual change orders, not to exceed statutory limits, for summer project work.

On a motion# 1579 by Trustee Smollen, seconded by Trustee Bagdasaryan and carried by a vote of 5/0, the Board of Education approved, by roll-call vote, Authorization of the Blanket Approval of Contractual Change Orders, Not to Exceed Statutory Limits, for the Summer Project Work.

AYES: Subian
LaBelle NOES: 0 Absent: 0 Abstained: 0
Smollen
Bagdasaryan
Blough



TITLE: RECEIVE MEASURE X BOND PERFORMANCE AUDIT

Business and Facilities
Information #1

April 19, 2022
Page 1 of 1

Prepared by: Ron Todo, Associate Superintendent
Business & Facilities

Background

The Measure X Bond was passed by the citizens of Simi Valley on November 8, 2016. A requirement of the passing of the bond on a 55% vote is that a performance audit be conducted on an annual basis. Senate Bill 581 requires concurrent submission of the performance audit to both the Board of Education and the Independent Citizens' Oversight Committee.

Article 13A of the California Constitution, Section 1(b)(3)(c) states "A requirement that the school district board, community college board, or county office of education conduct an annual, independent performance audit to ensure that the funds have been expended only on the specific projects listed."

The auditor's stated objectives were to:

- Document the expenditures charged to the 2016 General Obligation Measure X Bond Fund.
- Determine whether expenditures charged to the 2016 General Obligation Measure X Bond Fund have been made in accordance with the bond project list approved by the voters.
- Determine compliance with California Education Code related to oversight of bond expenditures.
- Note any incongruities, system weaknesses, or non-compliance with California Education Code related to bond oversight and provide recommendations for improvement.
- Provide the Board of Education and the Independent Citizens' Oversight Committee with a performance audit as required under the California Constitution and Proposition 39.

The performance audit reflects expenditures and transfers for the 2020/21 fiscal year. The conclusion portion of the audit indicates that, in all significant respects, the Simi Valley Unified School District has properly accounted for the expenditures associated with the Measure X bond funds, and such expenditures were made on authorized bond projects.

Recommendation

This presentation is for information only.



March 14, 2022

To the Governing Board and
Citizens' Oversight Committee
Simi Valley Unified School District
Simi Valley, California

We have audited the financial statements of Simi Valley Unified School District's (the District) Building Fund (Measure X) as of and for the year ended June 30, 2021, and have issued our report thereon dated March 14, 2022. Professional standards require that we advise you of the following matters relating to our audit.

Our Responsibility in Relation to the Financial Statement Audit

As communicated in our letter dated May 17, 2021, our responsibility, as described by professional standards, is to form and express an opinion about whether the financial statements that have been prepared by management with your oversight are presented fairly, in all material respects, in accordance with accounting principles generally accepted in the United States of America. Our audit of the financial statements does not relieve you or management of your respective responsibilities.

Our responsibility, as prescribed by professional standards, is to plan and perform our audit to obtain reasonable, rather than absolute, assurance about whether the financial statements are free of material misstatement. An audit of financial statements includes consideration of internal control over financial reporting as a basis for designing audit procedures that are appropriate in the circumstances, but not for the purpose of expressing an opinion on the effectiveness of the entity's internal control over financial reporting. Accordingly, as part of our audit, we considered the internal control of the District solely for the purpose of determining our audit procedures and not to provide any assurance concerning such internal control.

We are also responsible for communicating significant matters related to the audit that are, in our professional judgment, relevant to your responsibilities in overseeing the financial reporting process. However, we are not required to design procedures for the purpose of identifying other matters to communicate to you.

Our Responsibility in Relation to the Performance Audit

As communicated in our letter dated May 17, 2021, our responsibility, as described by professional standards, is to conduct a performance audit in accordance with *Government Auditing Standards*. Our performance audit does not relieve you or management of your respective responsibilities.

We are also responsible for communicating significant matters related to the objectives of the performance audit. However, we are not required to design procedures for the purpose of identifying other matters to communicate to you.

Planned Scope and Timing of the Audit

We conducted our financial and performance audits consistent with the planned scope and timing we previously communicated to you.

Compliance with All Ethics Requirements Regarding Independence

The engagement team, others in our firm, as appropriate, our firm, and other firms utilized in the engagement, if applicable, have complied with all relevant ethical requirements regarding independence.

Qualitative Aspects of the Entity's Significant Accounting Practices

Significant Accounting Policies

Management has the responsibility to select and use appropriate accounting policies. A summary of the significant accounting policies adopted the District is included in Note 1 to the financial statements. There have been no initial selection of accounting policies and no changes in significant accounting policies or their application during the the year ended June 30, 2021. No matters have come to our attention that would require us, under professional standards, to inform you about (1) the methods used to account for significant unusual transactions and (2) the effect of significant accounting policies in controversial or emerging areas for which there is a lack of authoritative guidance or consensus.

Significant Accounting Estimates

Accounting estimates are an integral part of the financial statements prepared by management and are based on management's current judgments. Those judgments are normally based on knowledge and experience about past and current events and assumptions about future events. Certain accounting estimates are particularly sensitive because of their significance to the financial statements and because of the possibility that future events affecting them may differ markedly from management's current judgments. No such significant accounting estimates were identified.

Financial Statement Disclosures

Certain financial statement disclosures involve significant judgment and are particularly sensitive because of their significance to financial statement users. The most sensitive disclosures affecting the District's Building Fund (Measure X) financial statements relate to:

The Summary of significant accounting policies in Note 1 and the disclosures of Commitments in Note 5.

Significant Difficulties Encountered during the Audits

We encountered no significant difficulties in dealing with management relating to the performance of the audits.

Uncorrected and Corrected Misstatements

For purposes of this communication, professional standards require us to accumulate all known and likely misstatements identified during the audit, other than those that we believe are trivial, and communicate them to the appropriate level of management. Further, professional standards require us to also communicate the effect of uncorrected misstatements related to prior periods on the relevant classes of transactions, account balances or disclosures, and the financial statements as a whole. There were no uncorrected or corrected misstatements that we identified as a result of our audit procedures that were brought to the attention of management.

Disagreements with Management

For purposes of this letter, professional standards define a disagreement with management as a matter, whether or not resolved to our satisfaction, concerning a financial accounting, reporting, or auditing matter, which could be significant to the District's Building Fund (Measure X) financial statements or the auditor's report. No such disagreements arose during the course of the financial and performance audit.

Representations Requested from Management

We have requested certain written representations from management which are included in the management representation letter dated March 14, 2022.

Management's Consultations with Other Accountants

In some cases, management may decide to consult with other accountants about auditing and accounting matters. Management informed us that, and to our knowledge, there were no consultations with other accountants regarding auditing and accounting matters.

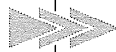
Other Significant Matters, Findings, or Issues

In the normal course of our professional association with the District, we generally discuss a variety of matters, including the application of accounting principles and auditing standards, operating and regulatory conditions affecting the entity, and operating plans and strategies that may affect the risks of material misstatement. None of the matters discussed resulted in a condition to our retention as the District's auditors.

This report is intended solely for the information and use of the Governing Board and management of the District and is not intended to be and should not be used by anyone other than these specified parties.

A handwritten signature in black ink that reads "Eide Bailly LLP". The signature is written in a cursive, flowing style.

Rancho Cucamonga, California



Financial and Performance Audits
Building Fund (Measure X)
June 30, 2021

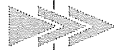
Simi Valley Unified School District

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Financial Audit

Building Fund (Measure X)

June 30, 2021

Simi Valley Unified School District



Independent Auditor's Report

Governing Board and
Citizens Oversight Committee
Simi Valley Unified School District
Simi Valley, California

Report on the Financial Statements

We have audited the accompanying financial statements of the Simi Valley Unified School District's (the District), Building Fund (Measure X), as of and for the year ended June 30, 2021, and the related notes to the financial statements, as listed in the table of contents.

Management's Responsibility for the Financial Statements

Management is responsible for the preparation and fair presentation of these financial statements in accordance with accounting principles generally accepted in the United States of America; this includes the design, implementation, and maintenance of internal control relevant to the preparation and fair presentation of financial statements that are free from material misstatement, whether due to fraud or error.

Auditor's Responsibility

Our responsibility is to express an opinion on these financial statements based on our audit. We conducted our audit in accordance with auditing standards generally accepted in the United States of America and the standards applicable to financial audits contained in *Government Auditing Standards*, issued by the Comptroller General of the United States. Those standards require that we plan and perform the audit to obtain reasonable assurance about whether the financial statements are free of material misstatement.

An audit involves performing procedures to obtain audit evidence about the amounts and disclosures in the financial statements. The procedures selected depend on the auditor's judgment, including the assessment of the risks of material misstatement of financial statements, whether due to fraud or error. In making those risk assessments, the auditor considers internal control relevant to the District's Building Fund (Measure X) preparation and fair presentation of the financial statements in order to design audit procedures that are appropriate in the circumstances, but not for the purpose of expressing an opinion on the effectiveness of the District's Building Fund (Measure X) internal control. Accordingly, we express no such opinion. An audit also includes evaluating the appropriateness of accounting policy used and the reasonableness of significant accounting estimates made by management, as well as evaluating the overall presentation of the financial statements.

We believe that the audit evidence we have obtained is sufficient and appropriate to provide a basis for our audit opinion.

Opinion

In our opinion, the financial statements referred to above present fairly, in all material respects, the financial position of the Building Fund (Measure X) of the Simi Valley Unified School District as of June 30, 2021, and the changes in financial position for the year then ended in accordance with accounting principles generally accepted in the United States of America.

Emphasis of Matter

As discussed in Note 1, the financial statements of the Building Fund specific to Measure X are intended to present the financial position and the changes in financial position attributable to the transactions of that Fund. They do not purport to, and do not, present fairly the financial position of the Simi Valley Unified School District as of June 30, 2021, and the changes in financial position for the year then ended in accordance with accounting principles generally accepted in the United States of America. Our opinion is not modified with respect to this matter.

Other Reporting Required by *Government Auditing Standards*

In accordance with *Government Auditing Standards*, we have also issued our report dated March 14, 2022, on our consideration of District's Building Fund (Measure X) internal control over financial reporting and on our tests of its compliance with certain provisions of laws, regulations, contracts, grant agreements and other matters. The purpose of that report is solely to describe the scope of our testing of internal control over financial reporting and compliance and the results of that testing, and not to provide an opinion on the effectiveness of the District's Building Fund (Measure X) internal control over financial reporting or on compliance. That report is an integral part of an audit performed in accordance with *Government Auditing Standards* in considering the District's Building Fund (Measure X) internal control over financial reporting and compliance.

A handwritten signature in black ink that reads "Eide Sallie LLP". The signature is written in a cursive, flowing style.

Rancho Cucamonga, California
March 14, 2022

Simi Valley Unified School District
Building Fund (Measure X)
Balance Sheet
June 30, 2021

Assets	
Investments	\$ 126,542,396
Accounts receivable	<u>103,242</u>
Total assets	<u><u>\$ 126,645,638</u></u>
Liabilities and Fund Balance	
Liabilities	
Accounts payable	\$ 2,463,761
Due to other funds	<u>25,518</u>
Total liabilities	<u>2,489,279</u>
Fund Balance	
Restricted for capital projects	<u>124,156,359</u>
Total liabilities and fund balance	<u><u>\$ 126,645,638</u></u>

Simi Valley Unified School District
Building Fund (Measure X)
Statement of Revenues, Expenditures, and Changes in Fund Balance
Year Ended June 30, 2021

Revenues	
Other local sources	<u>\$ 535,632</u>
Expenditures	
Facility acquisition and construction	<u>14,088,328</u>
Deficiency of Revenues over Expenditures	<u>(13,552,696)</u>
Other Financing Sources	
Other sources - proceeds and premium on general obligation bond issuances	<u>59,800,000</u>
Net Change in Fund Balance	46,247,304
Fund Balance - Beginning	<u>77,909,055</u>
Fund Balance - Ending	<u><u>\$ 124,156,359</u></u>

Note 1 - Summary of Significant Accounting Policies

The accounting policies of the Simi Valley Unified School District's (the District) Building Fund (Measure X) conform to accounting principles generally accepted in the United States of America as prescribed by the Governmental Accounting Standards Board (GASB) and the American Institute of Certified Public Accountants (AICPA). The Simi Valley Unified School District Building Fund (Measure X) accounts for financial transactions in accordance with the policies and procedures of the California School Accounting Manual.

Financial Reporting Entity

The financial statements include only the Building Fund of the Simi Valley Unified School District used to account for Measure X projects. This Fund was established to account for the expenditures of general obligation bonds issued under Measure X. These financial statements are not intended to present fairly the financial position and the changes in financial position of the Simi Valley Unified School District in accordance with accounting principles generally accepted in the United States of America.

Fund Accounting

The operations of the Building Fund (Measure X) are accounted for in a separate set of self-balancing accounts that comprise its assets, liabilities, fund balance, revenues, and expenditures. Resources are allocated to and accounted for in the fund based upon the purpose for which they are to be spent and the means by which spending activities are controlled.

Basis of Accounting

The Building Fund (Measure X) is accounted for using a flow of current financial resources measurement focus and the modified accrual basis of accounting. With this measurement focus, only current assets and current liabilities generally are included on the balance sheet. The statement of revenues, expenditures, and changes in fund balance reports on the sources (revenues and other financing sources) and uses (expenditures and other financing uses) of current financial resources.

Budgets and Budgetary Accounting

Annual budgets are adopted on a basis consistent with accounting principles generally accepted in the United States of America for all governmental funds. The District's governing board adopts an operating budget no later than July 1 in accordance with State law. A public hearing must be conducted to receive comments prior to adoption. The District's governing board satisfied these requirements. The Board revises this budget during the year to give consideration to unanticipated revenue and expenditures primarily resulting from events unknown at the time of budget adoption. The District employs budget control by minor object and by individual appropriation accounts. Expenditures cannot legally exceed appropriations by major object account.

Encumbrances

The District utilizes an encumbrance accounting system under which purchase orders, contracts and other commitments for the expenditure of monies are recorded in order to reserve that portion of the applicable appropriation. Encumbrances are liquidated when the commitments are paid, and all outstanding encumbrances lapse at June 30.

Fund Balance - Building Fund (Measure X)

As of June 30, 2021, fund balance of the Building Fund is classified as follows:

Restricted - amounts that can be spent only for specific purposes because of constitutional provisions or enabling legislation or because of constraints that are externally imposed by creditors, grantors, contributors, or the laws or regulations of other governments.

Spending Order Policy

When an expenditure is incurred for purposes for which both restricted and unrestricted fund balance is available, the District considers restricted funds to have been spent first. When an expenditure is incurred for which committed, assigned, or unassigned fund balances are available, the District considers amounts to have been spent first out of committed funds, then assigned funds, and finally unassigned funds, as needed, unless the governing board has provided otherwise in its commitment or assignment actions.

Estimates

The preparation of financial statements in accordance with accounting principles generally accepted in the United States of America requires management to make estimates and assumptions that affect the reported amounts of assets and liabilities and disclosure of contingent assets and liabilities at the date of the financial statements and the reported amounts of revenues and expenditures during the reporting period. Actual results could differ from those estimates.

Note 2 - Deposits and Investments

Policies and Practices

The District is authorized under California *Government Code* to make direct investments in local agency bonds, notes, or warrants within the State: U.S. Treasury instrument; registered State warrants or treasury notes; securities of the U.S. Government, or its agencies; bankers acceptances; commercial paper; certificates of deposit placed with commercial banks and/or savings and loan companies; repurchase or reverse repurchase agreement; medium term corporate notes; shares of beneficial interest issued by diversified management companies, certificates of participation, obligations with first priority security, and collateralized mortgage obligations.

Investment in County Treasury

The District is considered to be an involuntary participant in an external investment pool as the District is required to deposit all receipts and collections of monies with their County Treasurer (*Education Code* Section 41001). The fair value of the District's investment in the pool is reported in the accounting financial statement at amounts based upon the District's pro-rata share of the fairly value provided by the County Treasurer for the entire portfolio (in relation to the amortized cost of that portfolio). The balance available for withdrawal is based on the accounting records maintained by the County Treasurer, which is recorded on the amortized cost basis.

General Authorizations

Limitations as they relate to interest rate risk, credit risk, and concentration of credit risk are indicated in the schedules below:

Authorized Investment Type	Maximum Remaining Maturity	Maximum Percentage of Portfolio	Maximum Investment in One Issuer
Local Agency Bonds, Notes, Warrants	5 years	None	None
Registered State Bonds, Notes, Warrants	5 years	None	None
U.S. Treasury Obligations	5 years	None	None
U.S. Agency Securities	5 years	None	None
Banker's Acceptance	180 days	40%	30%
Commercial Paper	270 days	25%	10%
Negotiable Certificates of Deposit	5 years	30%	None
Repurchase Agreements	1 year	None	None
Reverse Repurchase Agreements	92 days	20% of base	None
Medium-Term Corporate Notes	5 years	30%	None
Mutual Funds	N/A	20%	10%
Money Market Mutual Funds	N/A	20%	10%
Mortgage Pass-Through Securities	5 years	20%	None
County Pooled Investment Funds	N/A	None	None
Local Agency Investment Fund (LAIF)	N/A	None	None
Joint Powers Authority Pools	N/A	None	None

Interest Rate Risk

Interest rate risk is the risk that changes in market interest rates will adversely affect the fair value of an investment. Generally, the longer the maturity of an investment, the greater the sensitivity of its fair value is to changes in market interest rates. The District does not have a formal investment policy that limits investment maturities as a means of managing its exposure to fair value losses arising from increasing interest rates. The District manages its exposure to interest rate risk by investing in the Ventura County Investment Pool. The District maintains a Building Fund (Measure X) investment of \$126,542,396 with the Ventura County Treasury Investment Pool with an average maturity of 322 days.

Credit Risk

Credit risk is the risk that an issuer of an investment will not fulfill its obligation to the holder of the investment. This is measured by the assignment of a rating by a nationally recognized statistical rating organization. The District's investments in the Ventura County Treasury Investment Pool is rated Aaa-mf by Moody's Investor Service Ratings.

Note 3 - Accounts Receivable

Accounts receivable at June 30, 2021, consisted of the following:

Local Government	
Interest	<u>\$ 103,242</u>

Note 4 - Accounts Payable

Accounts payable at June 30, 2021, consisted of the following:

Capital outlay	<u>\$ 2,463,761</u>
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Note 5 - Interfund Transactions

Interfund Payables (Due To)

Interfund payable balances arise from interfund transactions and are recorded by all funds affected in the period in which transactions are executed. Interfund payable balances at June 30, 2021, are as follows:

The balance of \$25,518 due to the General Fund are for the reimbursement of costs.

Simi Valley Unified School District
Building Fund (Measure X)
Notes to Financial Statements
June 30, 2021

Note 6 - Commitments and Contingencies

As of June 30, 2021, the Building Fund (Measure X) had the following commitments with respect to unfinished projects:

<u>Capital Project</u>	<u>Remaining Construction Commitment</u>	<u>Expected Date of Completion</u>
Modernization, Health & Safety, Technology, Building and Land Improvement projects at various sites:		
Elementary Schools:		
Arroyo Elementary School	\$ 6,124	October 31, 2021
Atherwood Elementary School	11,888	October 31, 2021
Berylwood Elementary School	6,113	October 31, 2021
Crestview Elementary School	205	October 31, 2021
Garden Grove Elementary School	739,845	October 31, 2021
Hollow Hills Elementary School	14,417	June 30, 2024
Knolls Elementary School	2,543	October 31, 2021
Park View Elementary School	31,642	October 31, 2021
Santa Susana Elementary School	304,316	March 31, 2022
Vista Elementary School	47,000	February 28, 2022
White Oak Elementary School	18,185	June 30, 2024
Middle Schools:		
Hillside Middle School	289,186	October 31, 2021
Sinaloa Middle School	333,886	October 31, 2021
Valley View Middle School	140,968	October 31, 2021
High Schools:		
Royal High School	7,724,070	March 31, 2022
Santa Susana High School	186,991	December 31, 2023
Simi Valley High School	8,424,161	June 30, 2024
Apollo Continuation School	450	October 31, 2021
Others:		
Adult Education	1,152	October 31, 2021
Monte Vista Independent Study	673	October 31, 2021
Information Services	316,781	April 30, 2022
Undesignated	18,013	June 30, 2025
	<u>\$ 18,618,609</u>	

Litigation

The District is involved in various litigation arising from the normal course of business. In the opinion of management and legal counsel, the disposition of all litigation pending is not expected to have a material adverse effect on the overall financial position of the District at June 30, 2021.



Independent Auditor's Report
June 30, 2021

Simi Valley Unified School District



**Independent Auditor's Report on Internal Control over Financial Reporting and
on Compliance and Other Matters Based on an Audit of Financial Statements Performed
in Accordance with *Government Auditing Standards***

Governing Board and
Citizens Oversight Committee
Simi Valley Unified School District
Simi Valley, California

We have audited, in accordance with the auditing standards generally accepted in the United States of America and the standards applicable to financial audits contained in *Government Auditing Standards*, issued by the Comptroller General of the United States, the financial statements of the Simi Valley Unified School District (the District) Building Fund (Measure X), as of and for the year ended June 30, 2021, and the related notes of the financial statements, and have issued our report thereon dated March 14, 2022.

Emphasis of Matter

As discussed in Note 1, the financial statements of the Building Fund specific to Measure X are intended to present the financial position and the changes in financial position attributable to the transactions of that Fund. They do not purport to, and do not, present fairly the financial position of the Simi Valley Unified School District as of June 30, 2021, and the changes in financial position for the year then ended in accordance with accounting principles generally accepted in the United States of America. Our opinion is not modified with respect to this matter.

Internal Control over Financial Reporting

In planning and performing our audit of the financial statements, we considered Simi Valley Unified School District's internal control over financial reporting (internal control) as a basis for designing audit procedures that are appropriate in the circumstances for the purpose of expressing our opinions on the financial statements, but not for the purpose of expressing an opinion on the effectiveness of Simi Valley Unified School District's internal control. Accordingly, we do not express an opinion on the effectiveness of Simi Valley Unified School District's internal control.

A *deficiency in internal control* exists when the design or operation of a control does not allow management or employees, in the normal course of performing their assigned functions, to prevent or detect and correct misstatements on a timely basis. A *material weakness* is a deficiency, or a combination of deficiencies, in internal control, such that there is a reasonable possibility that a material misstatement of the District's Building Fund (Measure X) financial statements will not be prevented or detected and corrected on a timely basis. A *significant deficiency* is a deficiency, or a combination of deficiencies, in internal control that is less severe than a material weakness, yet important enough to merit attention by those charged with governance.

Our consideration of internal control was for the limited purpose described in the first paragraph of this section and was not designed to identify all deficiencies in internal control that might be material weaknesses or significant deficiencies. Given these limitations, during our audit we did not identify any deficiencies in internal control that we consider to be material weaknesses. However, material weaknesses may exist that have not been identified.

Compliance and Other Matters

As part of obtaining reasonable assurance about whether Simi Valley Unified School District's Building Fund (Measure X) financial statements are free from material misstatement, we performed tests of its compliance with certain provisions of laws, regulations, contracts, and grant agreements, noncompliance with which could have a direct and material effect on the financial statements. However, providing an opinion on compliance with those provisions was not an objective of our audit, and accordingly, we do not express such an opinion. The results of our tests disclosed no instances of noncompliance or other matters that are required to be reported under *Government Auditing Standards*.

Purpose of this Report

The purpose of this report is solely to describe the scope of our testing of internal control and compliance and the results of that testing, and not to provide an opinion on the effectiveness of the District's Building Fund (Measure X) internal control or on compliance. This report is an integral part of an audit performed in accordance with *Government Auditing Standards* in considering the District's Building Fund (Measure X) internal control and compliance. Accordingly, this communication is not suitable for any other purpose.

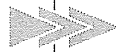
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Rancho Cucamonga, California
March 14, 2022

None reported.

Simi Valley Unified School District
Building Fund (Measure X)
Summary Schedule of Prior Audit Findings
June 30, 2021

There were no audit findings reported in the prior year's Schedule of Findings and Questioned Costs.



Performance Audit

Building Fund (Measure X)

June 30, 2021

Simi Valley Unified School District



Independent Auditor's Report on Performance

Governing Board and
Citizens Oversight Committee
Simi Valley Unified School District
Simi Valley, California

We were engaged to conduct a performance audit of the Simi Valley Unified School District (the District) Building Fund (Measure X) for the year ended June 30, 2021.

We conducted this performance audit in accordance with generally accepted government auditing standards. Those standards require that we plan and perform the audit to obtain sufficient, appropriate evidence to provide a reasonable basis for our findings and conclusions based on our audit objectives. We believe that the evidence obtained provides a reasonable basis for our findings and conclusions based on our audit objectives.

Our audit was limited to the objectives listed within the report which includes determining the District's compliance with the performance requirements as referred to in Proposition 39 and outlined in Article XIII A, Section 1(b)(3)(C) of the California Constitution and Appendix A contained in the *2020-2021 Guide for Annual Audits of K-12 Local Education Agencies and State Compliance Reporting* issued by the California Education Audit Appeals Panel. Management is responsible for the District's compliance with those requirements.

In planning and performing our performance audit, we obtained an understanding of the District's internal control in order to determine if the internal controls were adequate to help ensure the District's compliance with the requirements of Proposition 39 and outlined in Article XIII A, Section 1(b)(3)(C) of the California Constitution, but not for the purpose of expressing an opinion of the effectiveness of the District's internal control. Accordingly, we do not express an opinion on the effectiveness of the District's internal control. Had we performed additional procedures, other matters might have come to our attention that would have been reported to you.

The results of our tests indicated that the District expended Building Fund (Measure X) funds only for the specific projects approved by the voters, in accordance with Proposition 39 and outlined in Article XIII A, Section 1(b)(3)(C) of the California Constitution.

This report is intended solely for the information and use of the District, and is not intended to be and should not be used by anyone other than this specified party.

A handwritten signature in cursive script that reads "Eide Bailly LLP".

Rancho Cucamonga, California
March 14, 2022

Authority for Issuance

The General Obligation Bonds, Election 2016 (Measure X) were issued pursuant to the Constitution and laws of the State of California (the State), including the provisions of Chapters 1 and 1.5 of Part 10 of the California Education Code, and other applicable provisions of law.

The District received authorization at an election held on November 8, 2016, to issue bonds of the District in an aggregate principal amount not to exceed \$239,000,000 to finance specific construction and renovation projects approved by eligible voters within the District. The proposition required approval by at least 55% of the votes cast by eligible voters within the District (the 2016 Authorization). The Bond represents the first series of the authorized bonds to be issued under the 2016 Authorization. Following the issuance of the Series A, Series B, and Series C Bonds, the principal amount remaining under the 2016 Authorization will be \$109,000,000.

Purpose of Issuance

"To improve the quality of education; modernize and upgrade outdated classrooms, science labs, restrooms and school facilities; repair and replace leaky roofs; upgrade or renovate inadequate electrical and deteriorating plumbing and sewer systems; improve student access to computers/modern technology; and make health, safety and handicapped accessibility improvements, shall Simi Valley Unified School District issue \$239,000,000 of bonds at legal interest rates, include an independent citizens' oversight committee, no money for administrative salaries or be taken by the state."

Authority for the Audit

On November 7, 2000, California voters approved Proposition 39, the Smaller Classes, Safer Schools, and Financial Accountability Act. Proposition 39 amended portions of the California Constitution to provide for the issuance of general obligation bonds by school districts, community college districts, or county offices of education, "for the construction, reconstruction, rehabilitation, or replacement of school facilities, including the furnishing and equipping of school facilities, or the acquisition or lease of rental property for school facilities", upon approval by 55% of the electorate. In addition to reducing the approval threshold from two-thirds to 55%, Proposition 39 and the enacting legislation (AB 1908 and AB 2659) requires the following accountability measures as codified in *Education Code* Sections 15278-15282:

1. Requires that the proceeds from the sale of the bonds be used only for the purposes specified in Article XIII A, Section 1(b)(3)(C) of the California Constitution, and not for any other purpose, including teacher and administrator salaries and other school operating expenses.
2. The school district must list the specific school facilities projects to be funded in the ballot measure, and must certify that the governing board has evaluated safety, class size reduction and information technology needs in developing the project list.
3. Requires the school district to appoint a Citizen's Oversight Committee.

4. Requires the school district to conduct an annual independent financial audit and performance audit in accordance with the *Government Auditing Standards* issued by the Comptroller General of the United States of the bond proceeds until all of the proceeds have been expended.
5. Requires the school district to conduct an annual independent performance audit to ensure that the funds have been expended only on the specific projects listed.

Objectives of the Audit

1. Determine whether expenditures charged to the Building Fund have been made in accordance with the bond project list approved by the voters through the approval of Measure X.
2. Determine whether salary transactions, if any, charged to the Building Fund were in support of Measure X and not for District general administration or operations.

Scope of the Audit

The scope of our performance audit covered the period of July 1, 2020 to June 30, 2021. The population of expenditures tested included all object and project codes associated with the bond projects. The propriety of expenditures for capital projects and maintenance projects funded through other State or local funding sources, other than proceeds of the bonds, were not included within the scope of the audit. Expenditures incurred subsequent to June 30, 2021, were not reviewed, or included within the scope of our audit or in this report.

Methodology

We obtained the general ledger and the project expenditure reports prepared by the District for the fiscal year ended June 30, 2021, for the Building Fund (Measure X). Within the fiscal year audited, we obtained the actual invoices, purchase orders, and other supporting documentation for a sample of expenditures to ensure compliance with the requirements of Article XIII A, Section 1(b)(3)(C) of the California Constitution and Measure X as to the approved bond projects list. We performed the following procedures:

1. We identified expenditures and projects charged to the general obligation bond proceeds by obtaining the general ledger and project listing.
2. We selected a sample of expenditures using the following criteria:
 - a. We considered all expenditures recorded in all object codes.
 - b. We considered all expenditures recorded in all projects that were funded from July 1, 2020 through June 30, 2021 from Measure X bond proceeds.
 - c. We selected all expenditures that were individually significant expenditures. Individually significant expenditures were identified as individual transactions (expenditures) that exceeded approximately two percent of the total expenditures incurred.

- d. For all items below the individually significant threshold identified in item 2c, judgmentally selected expenditures based on risk assessment and consideration of coverage of all object codes, including transfers out, and projects for period starting July 1, 2020 and ending June 30, 2021.
3. Our sample included transactions totaling \$12,435,080. This represents 88% of the total expenditures of \$14,088,328.
4. We reviewed the actual invoices and other supporting documentation to determine that:
 - a. Expenditures were supported by invoices with evidence of proper approval and documentation of receipting goods or services.
 - b. Expenditures were supported by proper bid documentation, as applicable.
 - c. Expenditures were expended in accordance with voter-approved bond project list.
 - d. Bond proceeds were not used for salaries of school administrators or other operating expenses of the District.
5. We determined that the District has met the compliance requirement of Measure X if the following conditions were met:
 - a. Supporting documents for expenditures were aligned with the voter-approved bond project list.
 - b. Expenditures were not used for salaries of school administrators or other operating expenses of the Districts.

Conclusion

The results of our tests indicated that, in all significant respects, the Simi Valley Unified School District has properly accounted for the expenditures held in the Building Fund (Measure X) and that such expenditures were made for authorized Bond projects.

Simi Valley Unified School District
Building Fund (Measure X)
Schedule of Findings and Questioned Costs
June 30, 2021

None reported.

Simi Valley Unified School District
Building Fund (Measure X)
Summary Schedule of Prior Audit Findings
June 30, 2021

There were no audit findings reported in the prior year's Schedule of Findings and Questioned Costs.