



OAKLAND UNIFIED
SCHOOL DISTRICT

Community Schools,
Thriving Students

www.ousd.k12.us/facilities

Produced May 2013



“As a longtime Oakland resident, I have thoroughly enjoyed being a member of the Measure B Committee. We have had opportunities to monitor the progress of construction projects at various sites. It is gratifying to see our Oakland tax dollars used to benefit the Oakland community in so many constructive ways.”

Renee Swayne, Citizens' Bond Oversight Committee Member

Highland Elementary School Grand Opening Summer 2012

Measure B Independent Citizens' Bond Oversight Committee

Annual Report 2011-2012

BUILDING FULL SERVICE COMMUNITY SCHOOLS



OAKLAND UNIFIED
SCHOOL DISTRICT

Community Schools, Thriving Students

Together, We Are Building

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

About Measure B

BOND BACKGROUND

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

This annual report summarizes and highlights the work of the Independent Citizens' Bond Oversight Committee (CBOC) and reviews the expenditures in the Measure B School Facilities Improvement Bond for the fiscal year 2011-2012.

MEASURE B PROJECTS

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

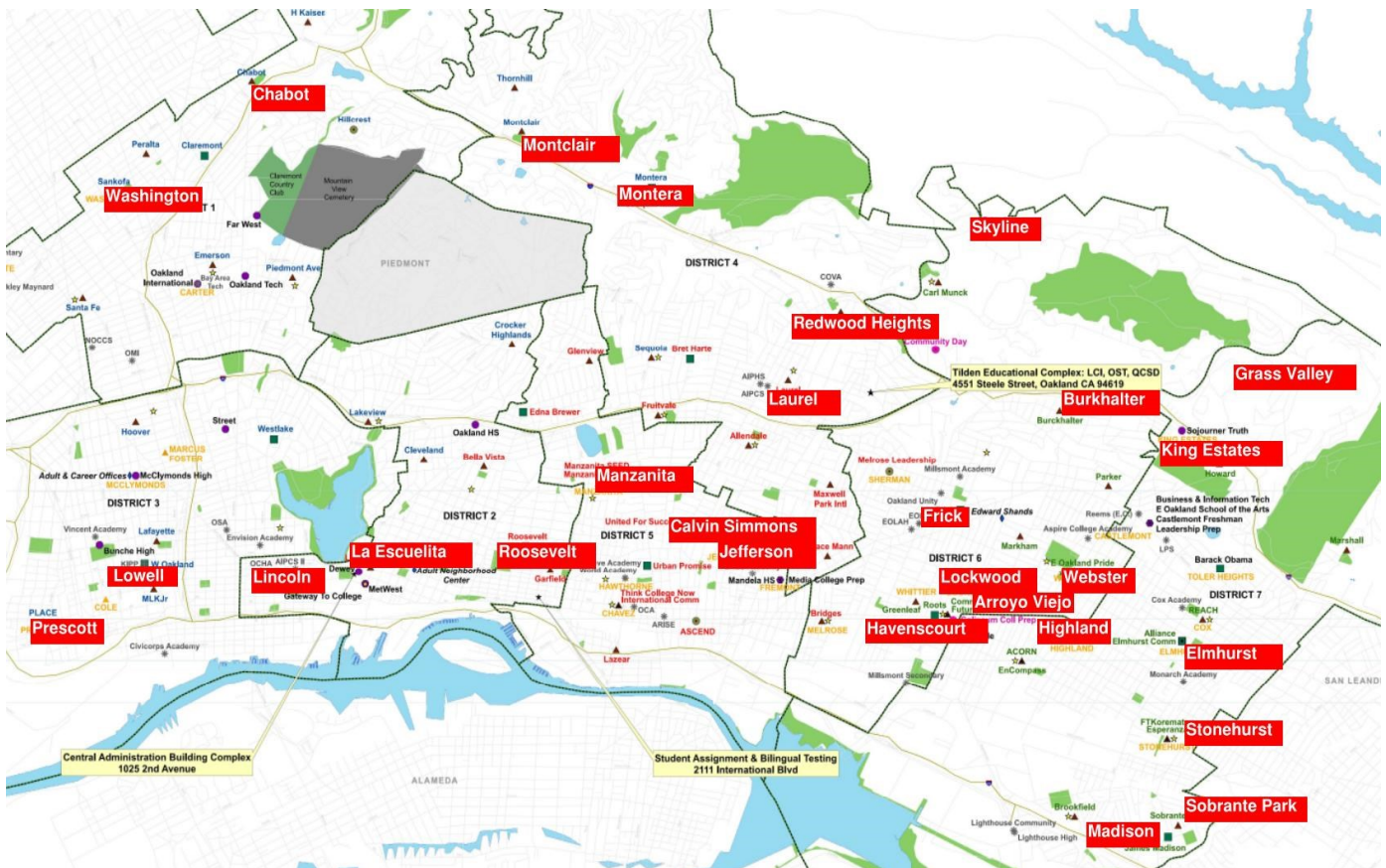
Measure B provided funding for Modernization and New Construction projects that included:

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

"The Facilities Team manages over 100 sites district-wide, and they've programmed the construction improvements to include almost every neighborhood in the city this year."

- Jean Moore, CBOC Vice Chair

PROJECT DISTRIBUTION ACROSS THE DISTRICT—FISCAL YEAR 2011-2012



Measure B Dollars at Work

SUPPORTING THE LOCAL ECONOMY

Since the passage of the local business utilization (LBU) policy by the Board of Education in 2008, Measure B has stimulated the local economy in the City of Oakland by awarding approximately \$112 million of work to over 152 local contractors and vendors. While the LBU requires a minimum of 20% of all work be done by certified local businesses, the Facilities Department is currently trending close to 50% local business utilization, with a 49.4 LBU. Overarching benefits of the LBU included:

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

Two examples of the success of the LBU program are the Highland and Lowell projects. The construction portion of the work at Highland is approximately \$12.9 million; the LBU on this project is 70.8% with over \$9.1 million awarded to local businesses. The construction at Lowell is \$13.7 million and the LBU is 70.9% with \$9.7 million awarded to local businesses.

LEVERAGING MEASURE B FUNDS

OUSD continues to use available opportunities to leverage the \$435 million Measure B Bond. For instance, the District, in conjunction with the local community, obtained Urban Forestry and Air Resource Quality grants from the State and Youth / Family Center grants from the City. In addition to State and Local grant funding, the District has taken advantage of subsidized interest rates offered by the Federal government through financial instruments such as Quality School Construction Bonds (QSCB), Build America Bonds (BAB), and Clean & Renewable Energy Bonds (CREB). To date, the District has applied for approximately \$105,309,688, and has received \$76,495,167, in grants and matching funds. The District continues to aggressively explore new opportunities to leverage Measure B funds.

SUSTAINABILITY AND CHPS

The District has adopted a very robust sustainability initiative, which requires that all construction and related building materials conform to sustainable standards. The Bond Program utilizes CHPS (Collaborative for High Performance Schools) in all elements of design and construction of Modernization and New Building projects. Last year, the La Escuelita Education Project earned 107 CHPS points, one of the largest number of points ever awarded to a project in the State. As evidence of our continued commitment to reaching our CHPS goal, the Montclair Modernization Project has earned 41 CHPS points. Our initiative not only is good for the environment, but natural light and other sustainability features also support students academic achievement.

“The District continues to do a good job building “greener” schools that are energy efficient and focused on using sustainable resources to achieve a healthy environment for learning and teaching.” - Andrea Dawson, CBOC Member

DISTRICT VISION, PRIORITIES, & GOAL

The Vision

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

The Priorities

OUSD’s priorities are:

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

The Goal

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

Building a Better Community

MODERNIZATION HIGHLIGHTS

OUSD has an inventory of aging classroom and ancillary buildings. Of the 328 permanent buildings in the District, nearly two in three are over 50 years old. The modernization of these existing facilities is key to enhancing educational opportunity and improving the educational outcomes for all students. Lowell Middle School and Washington/Sankofa are examples of an extensive modernization project.

The Lowell MS Modernization & Washington / Sankofa ES Projects include:

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

NEW CONSTRUCTION HIGHLIGHTS

OUSD's goal is to provide equitable classroom spaces for all students. To support this goal, the District has undertaken an aggressive campaign to replace old portables with new two story classrooms buildings. These buildings not only contain state of the art classrooms and restrooms, but many will also include ancillary spaces such as multipurpose rooms, health and wellness centers, and counseling areas. This year, the following schools had new construction projects:

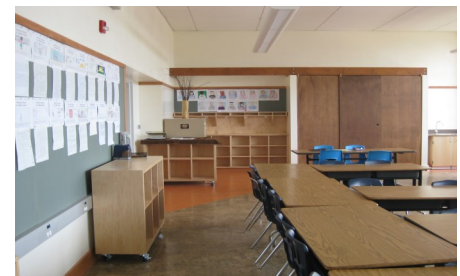
- Havenscourt MS New Classroom & Cafeteria Building
- Highland ES New Classroom & Cafeteria Building
- La Escuelita ES Phase I
- Lowell MS Modernization
- Montclair ES New Classroom Building
- Washington ES Modernization



Lowell MS Modernization



Lowell MS Science Classrooms



Washington (Sankofa) ES Classroom



Highland ES New Classroom & Cafeteria Building



Washington (Sankofa) ES Rendering

Building a Better Community

PLAYGROUND AND ATHLETIC FIELDS

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

FIRE ALARM / INTRUSION ALARM

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

CHILD DEVELOPMENT CENTERS / SCHOOL-BASED HEALTH CENTERS

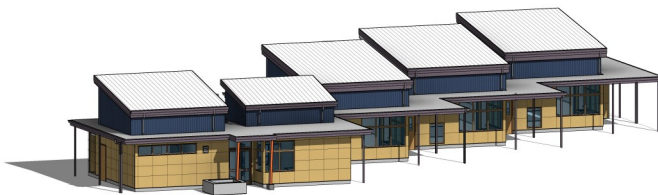
Part of the District's goal to support every aspect of student need, includes new child development centers (CDC) and school-based health centers (SBHCs) at some school sites. These facilities provide essential support services to students and the community at-large. Currently, OUSD has developed 31 CDC's and 14 SBHCs using Measure B funds. The photos show a few sites where OUSD has developed SBHCs during the past year.



Madison MS Field Improvements



Madison MS Field Improvements



Stonehurst CDC



Havenscourt MS Health Center



Arroyo Viejo CDC Renovation

CBOC Roles & Activities

PURPOSE AND DUTIES OF THE CBOC

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

Committee Members for the 2011-2012 Fiscal Year

| | |
|------------|--------------------|
| Chair | Patricia Williams |
| Vice Chair | Jean Moore |
| Secretary | Lisa Young |
| Member | Renee Swayne |
| Member | Patricia Centeno |
| Member | Andrea Dawson |
| Member | Christopher Vernon |
| Member | Odest Logan |

"The school sites I've visited this past year reflect a learner-centered approach to design that addresses the educational needs of learners in the 21st century, with a commitment to creating spaces that are conducive to intellectual, physical, and emotional wellbeing, and are environmentally sustainable"

- Lisa Young, CBOC Member

CBOC ACTIVITIES

The Committee convened and participated in a number of key activities such as preparing the Annual Report, reviewing program expenditures, and visiting 17 project sites to observe construction progress.

Following is a list of Project Site Visits for 2011-2012 Fiscal Year:

August 5, 2011

Frick MS
Skyline HS
Montera MS

Sept 2, 2011

Highland ES
West Oakland MS @ Lowell

October 7, 2011

Montclair ES
Manzanita ES

November 4, 2011

Roots @ Havenscourt MS
Sankofa @ Washington ES

December 2, 2011

Jefferson ES
Elmhurst MS

January 6, 2012

La Escuelita Educational Center (LEEC)

February 3, 2012

Havenscourt MS
Madison MS

March 2, 2012

Calvin Simmons MS (Life Academy)

April 6, 2012

New Highland Academy ES
West Oakland MS @ Lowell MS

Note:

ES = Elementary School

MS = Middle School

HS = High School

"I have learned that every site in OUSD is unique. The facilities staff is great at identifying the needs and challenges of each site and then planning and providing safe and modern facilities that support our students' development and success."

- Pat Williams, CBOC Chair

Audit Review and Findings

ANNUAL EXPENDITURE REVIEW

Of all the activities undertaken by the CBOC, its primary duty is to review and ensure that the Measure B funds are spent in accordance with the Bond language. The chart at the end of this report reflects a summary of project expenditures for the Fiscal Year Ended June 30, 2012. The report is organized to reflect the life of each project commencing with the Pre-Design Phase and concluding with the Completed Phase. In addition, \$9,607,252 was expended on program support items such as staff and consultants in direct support of the bond program. The combined project and program expenditure for the 2011/2012 Fiscal Year totaled \$90,569,055, and the cumulative expenditures for the first six years of the bond program totaled \$301,584,530 through June 30, 2012.

The Bond Issuances for the 2011/2012 Fiscal Year, each on March 21, 2012, were:

- *Election 2006, Series 2012A; amount \$31,040,000, maturity date is August 1, 2032*
- *Election 2006, Series 2012B, Qualified School Construction Board; amount \$23,960,000, maturity date is August 1, 2033*

FINANCIAL AND PERFORMANCE AUDIT

As required by Measure B, each fiscal year a financial and performance audit of Measure B expenditures is conducted. Yano Accountancy Corporation conducted the Financial and Performance Audits of Measure B Revenues and Expenditures for the year ending June 30, 2012.

The Financial Audit included a review of the financial schedule presented by the District and found that the financial schedule presents Measure B revenues and expenditures for the fiscal year ending June 30, 2012. The Financial Audit included the following findings and responses from the District Management:

- *Finding 2012-01: The District shall transfer to Measure B approximately \$300,000 in interest earned from the \$26,500,000 that was loaned to the general fund and repaid to Measure B.*
- *Finding 2012-02: The District is modifying its accrual accounting processes to provide more accurate year end estimates of expenditures.*
- *Finding 2012-03: The District is re-reviewing its invoice payment procedure to reduce processing time and ensure timely payments within 30 days of submission by vendors.*

The Performance Audit evaluated the District's compliance in ensuring all proceeds were spent on bond-approved projects and implementing internal controls. The Performance Audit included the following findings and responses from the District Management:

- *Finding 2012-04: The District is ensuring that all designated personnel sign and return the conflict-of-interest Form 700.*
- *Finding 2012-05: The District is including bid forms and documentation within purchase orders and change orders to ensure that excluded parties are not contracting for construction or professional services.*

STATEMENT OF COMPLIANCE

The 2011/2012 Measure B Annual Report is submitted to the Board of Education by the Committee, in accordance with the Education Code section 15278 (b). The Committee advises that, to the best of its knowledge based on available information provided by the District, OUSD is in compliance with the requirements of Article XXIIA, Section 1(b)(3) of the California Constitution. Specifically, the performance and financial audits were conducted and included a list of bond-approved projects. There were no findings disputing the requirements that all bond proceeds be used on bond-approved projects and that bond proceeds not be used to pay administrator salaries.

LOOKING AHEAD (Fiscal Year 2012-2013)

As we conclude this 2011-2012 annual report, we look forward to the 2012/2013 year. Here are some of next year's scheduled milestones in design and construction:

- District wide fire / intrusion alarm projects
- Construction of La Escuelita Education Center Phase II
- Completion of Arroyo Viejo CDC
- Completion of Havenscourt MS New Classroom & Cafeteria Building
- Completion of Stonehurst CDC
- Construction of Montclair ES
- Installation of portables at Washington (Sankofa) ES, Madison MS, and Whittier ES

"The Oakland Unified School District should be proud of the modernization projects that have been completed. Our youth's learning experience can only be enhanced by the state of the art classrooms, health centers, and overall building improvements from the Bond Measures approved by the citizens of Oakland"

- Odest Logan, CBOC Member

Expenditures

| Site | Project | Expenditures |
|---|---|------------------|
| Projects in the Pre Design Phase | | |
| Whittier | New Building | 72,089 |
| Allendale | Allendale Fire Alarm Replacement | 105 |
| Burbank (Explore) | Small Schools | |
| Roosevelt Elementary | Modernization | 226 |
| Lakeview CDC | Fire and Intrusion Alarm Replacement | |
| Laurel Elementary | Intrusion Alarm | |
| Lazear Elementary | Modernization | 36,420 |
| Melrose | Small Schools (Bridges) | - |
| Pre Design Phase Project Totals | | \$108,840 |
| Projects in the Design Phase | | |
| Webster Academy | CDC Replacement | 6,829 |
| Joaquin Miller | Fire and Intrusion Alarm Replacement | - |
| Glenview Elementary | Fire and Intrusion Alarm Replacement | 32,803 |
| Foster Elementary | Fire Alarm Replacement | 11,424 |
| Burbank Elementary | Fire and Intrusion Alarm Replacement | 36,444 |
| Bella Vista Elementary | Fire and Intrusion Alarm Replacement | 2,087 |
| Far West High School | Fire and Intrusion Alarm Replacement | - |
| Lafayette Elementary | Fire and Intrusion Alarm Replacement | 32,340 |
| Santa Fe CDC | Fire and Intrusion Alarm Replacement | 10,899 |
| Sherman Elementary | Fire and Intrusion Alarm Replacement | |
| Webster Academy | Kitchen Renovation | 70,607 |
| Centro Infantil | CDC Fire Alarm Replacement | 2,450 |
| Manzanita Elementary | CDC Fire Alarm Replacement | 7,350 |
| Piedmont | CDC Fire Alarm Replacement | 67,523 |
| Washington Small Schools | CDC Fire Alarm Replacement | |
| Life Academy | Life Academy Renovation Seismic/Rer | 95,015 |
| Hintil | CDC Replacement | 6,342 |
| Golden Gate | CDC Fire Alarm Replacement | 490 |
| Skyline High School | Auditorium Fire Alarm Replacement | - |
| Laurel Elementary | Fire Alarm Replacement | - |
| Fremont Federation | Modernization Phase 3 | 59,274 |
| Design Phase Project Totals | | 441,877 |
| Projects in the Construction Phase | | |
| Sobrante Park | Modernization | 472,307 |
| Piedmont Avenue Elem. | Fire and Intrusion Alarm Replacement | 14,573 |
| Lockwood | ES Fire and Intursion alarm Replacement | 18,990 |
| Jefferson Elementary | CDC Fire Alarm Replacement | 66,013 |
| King Estates Schools | Fire Alarm Replacement | 11,194 |
| Washington Small Schools | Small Schools (Sankofa) | 1,786,734 |
| Oakland Tech | Retro Commissing Project | 28,386 |
| Burckhalter Elementary School | Portable Installation Project | 75,524 |
| Grass Valley Elementary | Portable Installation Project | 67,529 |
| Oakland High | Building G Restroom project | 197,740 |
| Calvin Simmons | Improvements and Career Tech Lab | 1,194,989 |
| Piedmont | Portable Library | 2,115 |
| Laurel Elementary | CDC Replacement | 221,893 |
| Montclair | New Classroom | 1,797,988 |
| Stonehurst | CDC Replacement | 977,177 |
| Manzanita Elementary | Modernization | 1,429,858 |
| Arroyo Viejo | CDC Replacement | 656,821 |
| Havenscourt Middle | Classroom and Cafeteria | 1,449,978 |
| District-wide | Fire Alarm Maintenance | 653,014 |

Expenditures

| Site | Project | Expenditures |
|--|--------------------------------------|---------------------|
| Construction Phase Project Totals | | 11,122,824 |
| Projects in the Close-Out Phase | | |
| Oakland High | Williams Settlement | 1,563 |
| Madison Middle | Modernization | 922,108 |
| Chabot Elementary | Portable | 863,852 |
| Urban Promise Academy | Multi-purpose Gym | 247,026 |
| Calvin Simmons | Health Center | 158,087 |
| Roosevelt Middle School | Health Center | 27,013 |
| District-wide | Playground Inspections & Repair | 590,838 |
| Elmhurst Middle | Modernization/ Small Schools | 2,059,675 |
| Lowell Middle | Modernization | 13,393,459 |
| Lowell Middle | Health Center | 15,547 |
| La Esculelita Educational Complex | New Educational Complex | 29,400,707 |
| Highland Small Schools | New Building | 10,292,959 |
| Harriet Tubman | CDC Fire Alarm Replacement | 60,940 |
| Lockwood CDC | Fire and Intrusion Alarm Replacement | 407,118 |
| McClymonds Small Schools | Small Schools | 25,067 |
| Madison Middle | Health Center | 28,157 |
| Havenscourt Middle | Modernization | 412,309 |
| Montera | Modernization | 1,426,184 |
| Montera | Fire Alarm | 84,051 |
| Prescott Small Schools | Small Schools (PLACE) | 134,498 |
| Jefferson Elementary | Portable | 836,419 |
| Jefferson Elementary | Portable | 2,143,753 |
| Stonehurst | Restroom Renovation | 3,446 |
| Oakland High | Health Center | 434,243 |
| Oakland High | Modernization | 2,030,503 |
| Cox Elementary | Additional Classroom | 241,834 |
| Cox Elementary | Modernization/ Small Schools | 21,992 |
| Prescott Small Schools | Mod | 379,158 |
| Skyline High School | Skyline HS Wellness Center | 286,359 |
| Frick | Frick Wellness Center | 535,075 |
| Elmhurst Middle School | Elmhurst wellness Center | 308,637 |
| Havenscourt Middle | Health Center | 623,671 |
| Yuk Yau | CDC Fire Alarm Replacement | 11,873 |
| Highland Small Schools | CDC Fire Alarm Replacement | 4,605 |
| Cesar Chavez Elementary | School Fire Alarm Replacement | 570,321 |
| Roosevelt | ES Fire Alarm Replacement | 172,123 |
| Redwood Heights | ES Fire Alarm Replacement | 391 |
| Highland Small Schools | Fire Alarm Upgrade | - |
| Brookfield | Playground | 38,219 |
| Lincoln Elementary | Portable Replacement | 74,698 |
| Stonehurst | Small Schools (Esperanza) | 4,000 |
| Calvin Simmons | Modernization/Small Schools | 4,893 |
| Whittier | Modernization | 10,890 |
| Close-Out Phase Project Totals | | 69,288,262 |
| Total Project Expenditures | | \$80,961,803 |
| District Staff | | \$2,110,822 |
| Consultants and Prof. Services | | \$7,496,430 |
| Total Expenditures | | \$90,569,055 |