



OAKLAND UNIFIED
SCHOOL DISTRICT

Community Schools, Thriving Students

www.ousd.k12.us/facilities

Produced April 2014



Coliseum College Prep Academy and Roots International Academy at
Havenscourt New Classroom & Cafeteria Building

Measure B Independent Citizens' Bond Oversight Committee

Annual Report 2012-2013

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.

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 \$228 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. 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 Calvin Simmons and Havenscourt projects. The construction portion of the work at Calvin Simmons is approximately \$15 million; the LBU on this project is 77% with over \$7.6 million awarded to local businesses. The construction at Havenscourt is \$11.5 million and the LBU is 60% with \$6.9 million awarded to local businesses.

"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 Vice Chair

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's robust green building sustainability initiative requires that all design and construction projects meet its High Performance Schools Guidelines. There is a focus on maximizing natural daylighting, conserving energy, conserving water, resource efficiency, and superior indoor environmental quality among other sustainable attributes. The Bond Program utilizes the latest CHPS (Collaborative for High Performance Schools) Criteria (currently CA-CHPS v.2009) in all elements of design and construction of Modernization and New Building projects. The La Escuelita Education Center, Phase One and Highland Elementary School projects should earn 54- 56 points, among the highest number of points ever awarded to a project in the State. Moreover, the La Escuelita Education Center was designed to be the District's first zero net energy (ZNE) school campus, with a combined Phase 1 and 2 solar photovoltaic system of approximately 600 kW, when completed.

Other ongoing OUSD High Performance Schools include projects at: Montclair Elementary, Havenscourt Middle School, Washington (Sankofa Academy) Elementary, and La Escuelita Education Center Phase 2.

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 classrooms 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. Washington/Sankofa Elementary School is an example of an extensive modernization project.

Sankofa ES at Washington Project includes:

- Renovated classrooms with improved lighting, improved air quality circulation, 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



Sankofa Academy at Washington Modernization

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 classroom 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:

- Roots International Academy and Coliseum College Prep Academy at Havenscourt New Classroom & Cafeteria Building
- United for Success and Life Academy at Calvin Simmons Career Tech Lab & Site Improvements
- La Escuelita ES Phase I
- Sankofa Academy at Washington ES Modernization



Roots International Academy and Coliseum College Prep Academy at Havenscourt New Classroom & Cafeteria

Building a Better Community

NEW CONSTRUCTION HIGHLIGHTS

La Escuelita Elementary School includes a new two-story classroom building and a multipurpose building. The multipurpose building is comprised of a full service kitchen, gymnasium/cafeteria, health clinic (approximately 2,800 SF), District Data Center, TV Station and all associated site work including underground utilities and landscaping.

The La Escuelita Education Center, Phase One project should earn 54 - 56 CHPS points, among the highest number of points ever awarded to a project in the State. Moreover, the La Escuelita Education Center was designed to be the District's first zero net energy (ZNE) school campus, with a combined Phase 1 and 2 solar photovoltaic system of approximately 600 kW, when completed. We believe it will be the first comprehensive public K-12 ZNE campus in the state, demonstrating our commitment to high quality sustainable facilities for our students and community, while lowering our long-term operating costs.



United for Success and Life Academy at Calvin Simmons project is comprised of two increments: Career Tech Lab and Site Building Improvements. The Career tech lab is a two story structure consisting of two life science laboratories, a biochemistry laboratory, a health laboratory with two exam rooms and support space totaling 14,505 sf. Site and building improvements include additional restroom, separation of exiting corridors and modification of existing classrooms for middle school programming.



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 Park Upper Campus School Athletic Field



Photo By Kris Knutson

Arroyo Viejo Child Development Center



La Escuelita Wellness Center

Modernization of the existing Child Development Center at Arroyo Viejo includes a complete renovation of the building and grounds. The building has 4 classroom spaces and is approximately 5,000 square feet. A variety of shading devices and structures are installed around the perimeter of the building. The interior and exterior of the building has been re-clad with new materials. The floor plan has been reconfigured to better suit the programmatic needs of the CDC.

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 2012-2013 Fiscal Year

Chair	Renee Swayne
Vice Chair	Andrea Dawson
Secretary	Lisa Young
Member	Cesar Escalante
Member	Patricia Williams
Member	Patricia Centeno
Member	Jean Moore
Member	Christopher Vernon
Member	George Holland

"Thankfully, the people of Oakland understand that students are more likely to prosper when their environment is conducive to learning. By passing the bond measures the community has insured that the District can continue to build new and renovate existing school buildings. This sends a powerful message to kids and shows the importance their community places on education."

- Lisa Young, CBOC Secretary

CBOC ACTIVITIES

The Committee convened and participated in a number of key activities such as preparing the Annual Report, reviewing program expenditures, and visiting 20 project sites to observe construction progress.

Following is a list of Project Site Visits for 2012-2013 Fiscal Year:

July 13, 2012

Webster (East Oakland Pride ES)
Madison (Madison Park Upper Campus MS)
Stonehurst ES (Korematsu)
Sobrante Park (Madison Park Lower Campus ES)

August 3, 2012

La Escuelita Educational Center (LEEC) - Phase 1
Washington (Sankofa Academy ES)
Oakland HS
Piedmont ES

September 7, 2012

Montclair ES
Calvin Simmons (Life Academy HS/United for Success MS)

October 5, 2012

Burhkalter ES
Grass Valley ES

November 2, 2012

LEEC- Phase 2
Havenscourt MS

December 7, 2012

Arroyo Viejo CDC
Madison MS

June 7, 2013

Stonehurst CDC
Glenview ES

July 12, 2013

Marcus Foster ES (Central Commissary Kitchen)
Calvin Simmons MS (Life Academy HS/United for Success MS)

Note:

CDC = Child Development Center

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 Member

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, \$8,700,437 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 2012/2013 Fiscal Year totaled \$29,784,184, and the cumulative expenditures for the first seven years of the bond program totaled \$331,368,714 through June 30, 2013.

The Bond Issuances for the 2012/2013 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, 2013.

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, 2013. The Financial Audit included the following findings and responses from the District Management:

- *Finding 2013-01: The audit found that credits to expenditures did not have adequate support. OUSD responded that recommended adjustments have been made to correct this finding.*
- *Finding 2013-02: The audit found that some construction contract invoices were not processed within 30 days of submission. OUSD management says progress has been made and they continue to work to address this finding and pledge to have it corrected before the next audit is issued.*

The Performance Audit evaluated the District's compliance in ensuring all proceeds were spent on bond-approved projects and implementing internal controls. Based on the evidence obtained from OUSD there is a reasonable basis for the findings and conclusions that bond funds were properly expended and internal controls over compliance were implemented.

STATEMENT OF COMPLIANCE

The 2012/2013 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 2013-2014)

As we conclude this 2012-2013 annual report, we look forward to the 2013/2014 year. Here are some of next year's scheduled milestones in design and construction:

- District wide fire / intrusion alarm projects
- Completion of La Escuelita Education Center Phase II
- Installation of portables at Washington (Sankofa) ES, Madison MS, and Whittier ES

MEASURE J

In November 2012, Oakland voters passed Measure J, a \$475 million School Facilities Improvement Bond, for Oakland Unified School District to enhance the educational environment for the students and communities of Oakland. Measure J will provide funding for Modernization and New Construction projects that include:

- Seismic upgrades of schools and classrooms to reduce danger from earthquakes
- Asbestos and lead paint removal
- Upgrade science labs, classrooms, computers and technology
- Repair bathrooms and unsafe playground areas
- Upgrade kitchen facilities to improve nutrition and nutritional education
- California Solar Initiative Project
- Paving Projects

"In a city where many of the schools were built years ago and where some sites have not had improvements in many years, it is exciting to see how the bond expenditures have improved the educational environment for students in Oakland, even as we realize there is simply not enough money to correct all of the insufficiencies that exist.

- Renee Swayne, CBOC Chair

Expenditures

Site	Project	Expenditures
Projects in the Pre Design Phase		
Allendale	Allendale Fire Alarm Replacement	-
Burbank (Explore)	Small Schools	-
Lakeview CDC	Fire and Intrusion Alarm Replacement	
Laurel Elementary	Intrusion Alarm	14,979
Lazear Elementary	Modernization	
Melrose	Small Schools (Bridges)	
Roosevelt Elementary	Modernization	63,635
Whittier	New Building	22,481
Pre Design Phase Project Totals		101,095
Projects in the Design Phase		
Bella Vista Elementary	Fire and Intrusion Alarm Replacement	14,208
Burbank Elementary	Fire and Intrusion Alarm Replacement	
Centro Infantil	CDC Fire Alarm Replacement	
Far West High School	Fire and Intrusion Alarm Replacement	28,200
Foster Elementary	Fire Alarm Replacement	
Fremont Federation	Modernization Phase 3	2,021
Glenview Elementary	Fire and Intrusion Alarm Replacement	8,839
Golden Gate	CDC Fire Alarm Replacement	
Hintil	CDC Replacement	6,217
Joaquin Miller	Fire and Intrusion Alarm Replacement	8,881
Lafayette Elementary	Fire and Intrusion Alarm Replacement	9,932
Laurel Elementary	CDC Replacement	8,600
Laurel Elementary	Fire Alarm Replacement	239
Life Academy	Life Academy Renovation Seismic/Reno	
Manzanita Elementary	CDC Fire Alarm Replacement	1,960
McClymonds Small Schools	Small Schools	9,105
Santa Fe CDC	Fire and Intrusion Alarm Replacement	1,970
Sherman Elementary	Fire and Intrusion Alarm Replacement	
Skyline High School	Auditorium Fire Alarm Replacement	-
Washington Small Schools	CDC Fire Alarm Replacement	
Webster Academy	CDC Replacement	
Design Phase Project Totals		99,972
Projects in the Construction Phase		
Arroyo Viejo	CDC Replacement	4,513
Calvin Simmons	Improvements and Career Tech Lab	-
District-wide	Fire Alarm Maintenance	334,260
Havenscourt Middle	Classroom and Cafeteria	540,337
King Estates Schools	Fire Alarm Replacement	778,304
Montclair	New Classroom	7,042,683
Oakland Tech	Retro Commising Project	-
Piedmont Avenue Elem.	Fire and Intrusion Alarm Replacement	54,586
Sobrante Park	Modernization	473
Stonehurst	CDC Replacement	-
Washington Small Schools	Small Schools (Sankofa)	9,846
Construction Phase Project Totals		8,762,981
Projects in the Close-Out Phase		
Burckhalter Elementary School	Portable Installation Project	32,464
Calvin Simmons	Health Center	8,544

Expenditures

Site	Project	Expenditures
Calvin Simmons	Modernization/Small Schools	
Chabot Elementary	Portable	612,039
Cox Elementary	Additional Classroom	56,560
Cox Elementary	Modernization/ Small Schools	
District-wide	Playground Inspections & Repair	996
Elmhurst Middle	Modernization/ Small Schools	37,625
Elmhurst Middle School	Elmhurst wellness Center	386
Frick	Frick Wellness Center	2,098
Grass Valley Elementary	Portable Installation Project	805,968
Harriet Tubman	CDC Fire Alarm Replacement	22,448
Havenscourt Middle	Modernization	66,232
Havenscourt Middle	Health Center	2,762
Highland Small Schools	New Building	2,265,278
Highland Small Schools	CDC Fire Alarm Replacement	44
Jefferson Elementary	CDC Fire Alarm Replacement	22,087
Jefferson Elementary	Portable	50,221
La Esculelita Educational Complex	New Educational Complex	1,916,877
Lincoln Elementary	Portable Replacement	8,220
Lockwood	ES Fire and Intursion alarm Replacement	284,326
Lockwood CDC	Fire and Intrusion Alarm Replacement	87,373
Lowell Middle	Modernization	3,595,485
Lowell Middle	Health Center	1,080
Madison Middle	Modernization	-
Montera	Modernization	40,902
Oakland High	Building G Restroom project	1,440,282
Oakland High	Health Center	8,246
Oakland High	Modernization	621,461
Piedmont	CDC Fire Alarm Replacement	12,818
Piedmont	Portable Library	265
Prescott Small Schools	Small Schools (PLACE)	3,242
Prescott Small Schools	Mod	95,525
Roosevelt	ES Fire Alarm Replacement	471
Roosevelt Middle School	Health Center	10,793
Skyline High School	Skyline HS Wellness Center	-
Urban Promise Academy	Multi-purpose Gym	1,350
Webster Academy	Kitchen Renovation	3,232
Westlake	Modernization	2,000
Whittier	Modernization	
Close-Out Phase Project Totals		12,119,700
Total Project Expenditures		\$21,083,747
District Staff		\$2,401,276
Consultants and Prof. Services		\$6,299,161
Total Expenditures		\$29,784,184