APPROVED FOR PROCESSING
BY SUPERINTENDENT'S OFFICE
6/11/24
Date
Signature

TITLE: CITIZENS' BOND OVERSIGHT COMMITTEE (CBOC) ANNUAL REPORT FOR FISCAL YEAR 2022-2023

Business & Facilities
Information #2

June 11, 2024

Prepared by: Ron Todo, Associate Superintendent
Business & Facilities

Background Information

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

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

At their regular meeting held on May 15, 2024, the CBOC approved the content of their Annual Report for Fiscal Year 2022-2023. A copy of this report is attached hereto as Exhibit "A".

Recommendation

This report is for information only.

EXHIBIT "A"

Simi Valley Schools
SIMI VALLEY UNIFIED SCHOOL DISTRICT

Measure X Annual Report



JORDAN GILBERT & BAIN
LANDSCAPE ARCHITECTS, INC.

SIMI VALLEY HIGH SCHOOL
5400 COCHRAN STREET
SEMI VALLEY, CALIFORNIA 90365

CENTRAL CAMPUS QU

Simi Valley Measure X Citizens' Bond Oversight Committee

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

The Simi Valley Measure X Citizens’ Bond Oversight Committee (Measure X CBOC or the Committee) is pleased to present its annual report for the Simi Valley Unified School District (SVUSD or the District) Fiscal Year 2022-23. Our independent CBOC was established, as required by law, to actively monitor all Measure X projects and expenditures; provide proper oversight, control, and accountability to ensure that Measure X bond funds are used as they were intended; and to inform the public concerning the District’s expenditure of bond proceeds.

Background:

Measure X is a $239 million bond measure approved by voters on November 8, 2016, authorizing funding for the design and construction of new buildings, modernization of existing school facilities, and modern technology within Simi Valley Unified School District (“the District”).

In June 2017 the District brought to market, $70 million of Series “A” general obligation bonds, the first series to be used under the Measure X authorization.

In June 2019 the District brought to market, $60 million of Series ``B” general obligation bonds, the second series to be used under the Measure X authorization.

In October 2020 the District brought to market, $59.8 million of Series ``C” general obligation bonds, the third series to be used under the Measure X authorization.

The district received the Series “A”, Series “B” funds, and Series “C” which are being utilized for implementation of Measure X projects.

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

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

During the 2022-23 fiscal year, the District was able to complete several important projects using Measure X funds, including the following:

- Garden Grove inclusive playground
- Santa Susana High School security fence and gates
- Sycamore security fence and landscaping
- Sycamore Inclusive Playground
- Berylwood Classroom Renovation
- Knolls Special Needs Restroom Renovation - Bldg P3
- Vista Classroom Renovations Measure X
- Royal High School Portables Relocation to RSRPD Pool
- Royal High School Gym Snack Bar Renovation
- Royal High School East Quad
- Simi Valley High School Main Quad, Pathways and Shade Structure
- Simi Valley High Classroom Renovations at D, K, B and H and Quads

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

During this report period the Simi Valley Unified School District has received funds from the Bond Series A, B, and C, for a total of $189.8 million in general obligation bonds, which are being utilized for implementation of Measure X projects during this report period.

While the progress made with the Measure X funds has been significant, the Board of Education will need to pursue additional funding to meet the commitments of Measure X.

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

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

Sincerely,



Rebecca Hopkins
Chair, Bond Measure X, CBOC

PURPOSE

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

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

DISTRICT COMPLIANCE

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

CBOC ACTIVITIES

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

- Royal High School (RHS) Quad projects, MPR Plaza, and Snack Bar Construction Site Walk– November 2, 2022 CBOC Meeting

Royal High School (RHS) completed Quad and MPR Plaza projects completed

Figure A1: RHS WestQuad





Figure A2: RHS West Quad completed



Figure A3: RHS East Quad completed



Figures A4 and A5: RHS MPR with retractable seating completed



CBOC members at Site Visit at Simi Valley High School, May 24, 2023 (photo below)



Simi Valley High School (SVHS) Site Visit/Walk- Classroom Renovation Project D, K, B, H & Completed Quad – May 24, 2023 CBOC Meeting

Classroom Renovation Project D, K, B and H

On May 24, 2023, District Measure X staff hosted CBOC members for an onsite visit to see the completion of the Classroom Renovation Project for classrooms: D, K, B and H and the Quad at Simi Valley High School.

SVHS Classroom renovation project D,K,B and H.

- The SVHS Classroom Renovation Project updated dated classrooms D, K, B and H at Simi Valley High School.
- The new renovations included new desk and chair compositions that can be reconfigured.
- The new whiteboards have been replaced, wherein, current Director of Secondary Education, Matt Guzzo gave a brief demonstration to the CBOC members of the functionality of the new whiteboard technology.

Figure B1: SVHS Classroom renovation project D,K,B and H with multi level classroom seating



SVHS Quad Renovation Project:

(Below) Figure B2: SVHS Main Quad completed



(***Right) Figure B3: SVHS Quad & Pathway completed***



(Below) Figure B4: SVHS Shade Structure with tables completed



California Association of Bond Oversight Committees (CABOC) virtual conference - October 15, 2022

Some of the Citizen's Bond Oversight Committee members attended this virtual conference. I was one of the attendees and found the information to be very informative as to the purpose of the Bond Oversight committee.

This virtual conference provided overviews of:
Audit functions of oversight committees, how to perform the auditory practices, best practices for updating stakeholders, understanding current and/or forecasted states for bond measures, possible needs for further bonds to complete projects, how performance audits are performed by a third person, various upcoming legislation for CBOC practices and detailed overviews of the type contracting practices of bond management firms for completion of projects.

Other activities attended by CBOC members:

- **Measure X Bond Workshop – October 19, 2022**
- **Brown Act Training (with packet)– January 30, 2023**

Meetings – The committee held quarterly meetings this year occurring on September 28, 2022, November 2, 2022, March 1, 2023, and May 24, 2023. Each meeting is open to the public to provide input regarding the overall bond program, budget, financing matters and construction schedules.

Website Measure X Citizens Bond Oversight Committee - Simi Valley Unified School District (simivalleyusd.org(https://www.simivalleyusd.org/district/business-facilities/welcome-to-the-measure-x-bond/measure-x-citizens-bond-oversight-committee)– The District continues to assist in maintaining and updating a CBOC page on their website. This page provides the public with general information relating to the CBOC including meeting minutes, annual report, and audit reports. The district also maintains additional Measure X information on their website that provides updated Measure X expenditures, planning and construction schedules, budget reports, press releases, legislative requirements and other items of interest.

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

Financial and Performance Audits – The seventh annual financial and performance audit of the Measure X program was finalized on December 14, 2023 by Eide Bailly LLP, an independent certified public accountant firm with an office in Rancho Cucamonga. These audits covered the fiscal year of July 1, 2022 thru June 30, 2023. The CBOC has reviewed both the financial and performance audits for Fiscal Year 2022-23, which did not identify any findings and concluded the District has properly accounted for the expenditures held in the Building Fund (Measure X) and that such expenditures were made for authorized Bond projects.

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

CBOC Membership

At the beginning of fiscal year 2022-23, the CBOC was made of the following 11 members: Josh Mengers, Steven Randall, Rebecca Hopkins, Jay (Jayesh) Patel, Josh Platten, Ray Mehta, Larry Borovay, Anabel Moctezuma-Palafix, John Strickler, Katie Smith, and Omar Noorzai. During the year, some of these members' terms expired, or did not renew their terms: such as, Steven Randall, who termed out, with Anabel Moctezuma-Palafix and Katherine (Katie) Smith, no further renewal of terms. The following two individuals began new terms as members of the CBOC committee: Jonathan Bonesteel and Elisse Sherman. Meanwhile, continuing their terms were: Rebecca Hopkins, Jay (Jayesh) Patel, John Strickler, Josh Platten, Omar Noorzai, Rasesh (Ray) Mehta, and Larry Borovay.

The final makeup of the CBOC committee on June 30, 2023 with details about term expiration dates, position held and representation from each of the categories required by California Education Code 15282 is shown in Table 1: California Education Code 15282 states that the Committee shall consist of at least seven members, who shall serve for a minimum term of one year and for no more than three consecutive terms. Committee shall have members from each of the required categories shown in this table. Note that throughout the year, the CBOC's membership always included at least seven members with at least one member from each of the required categories.

Table 1:

SimiValleySchools
SIMI VALLEY UNIFIED SCHOOL DISTRICT

Citizens Bond Oversight Committee (CBOC)
Measure X

Members	TERMS						DATE		Position Held	REQUIRED CATEGORIES					
	Term #1		Term #2		Term #3		Date Started	Date Ended		Local Business Org.	Senior Citizens Org.	Bona-fied Taxpayers Org.	Parent/ Guardian of Child Enrolled in District	Parent/ Guardian of Child Enrolled in District and Active in PTA or School Site Council	At-Large Community Member
	One (1) Year	Two (2) Year	One (1) Year	Two (2) Year	One (1) Year	Two (2) Year									
Jonathan Bonesteel		X					11/21/22	11/30/2024	Vice Chair				X	X	
Jayesh Patel		X					08/17/21	9/30/23					X		
John Strickler		X					08/17/21	9/30/23			X				
Josh Mengers		X					08/17/21	9/30/23					X	X	X
Josh Platten	X		X				08/17/21	9/30/23					X		
Larry Borovay							06/14/22	6/24/24		X					
Elisse Sherman		X					11/15/22	11/30/24	Publicity Chair				X	X	X
Omar Noorzai	X		X				08/17/21	9/30/23	Secretary				X	X	X
Rasesh (Ray) Mehta		X					08/17/21	9/30/23					X	X	X
Rebecca Hopkins	X			X			08/17/21	9/30/24	Chair			X	X		

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