Travis Unified School District

General Obligation Bond Measure Citizens' Oversight Committee

Informational Workshop for the Public



TRAVIS UNIFIED SCHOOL DISTRICT

Government Financial Services Joint Powers Authority

October 28, 2024
Presented by Lori Raineri

Presentation materials provided for distribution at meeting and not meant to stand alone without verbal commentary and discussion.

Tonight's Agenda

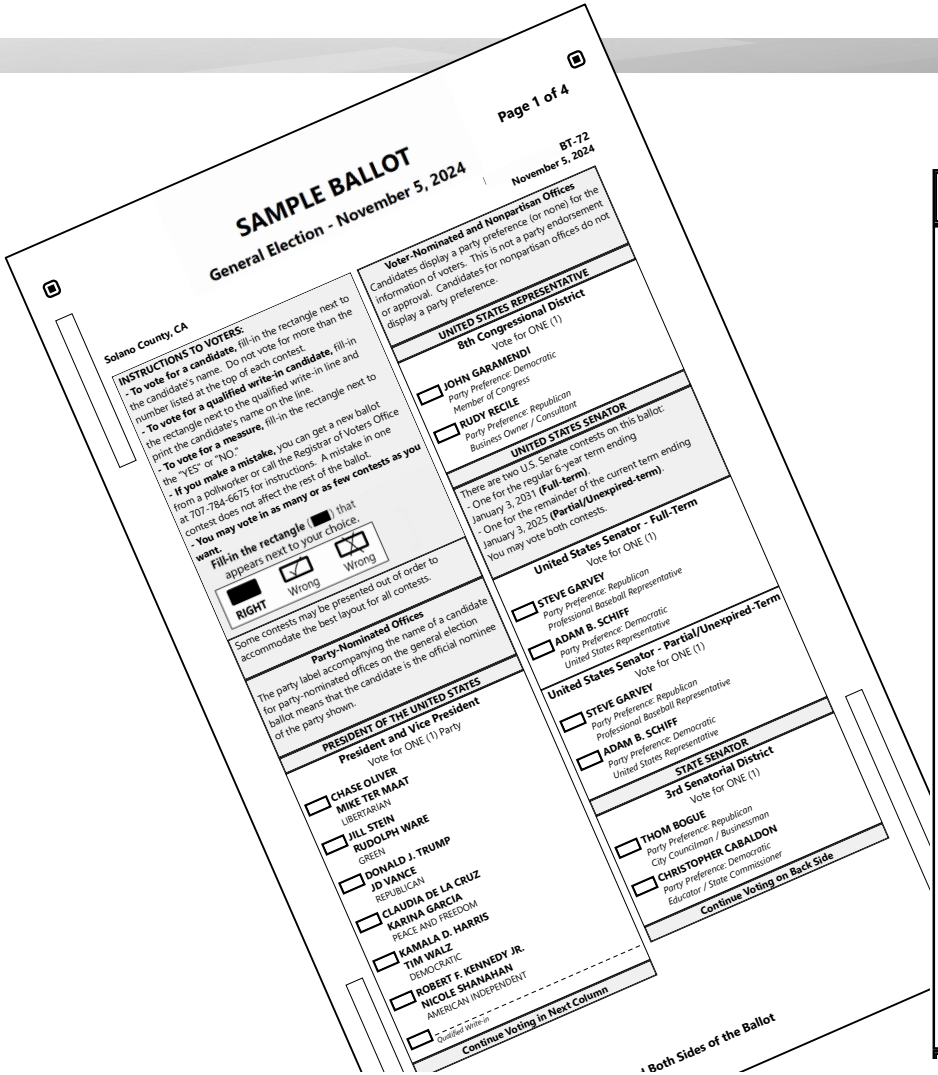
- Review November 5, 2024 Ballot Measure R
- Review the *Strict Accountability in Local School Construction Bonds Act of 2000*
- Next Steps

✓ *Questions welcome at all times.*



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Measure R Ballot Question


SAMPLE BALLOT
General Election - November 5, 2024
Page 1 of 4
BT-72
November 5, 2024
Solano County, CA
INSTRUCTIONS TO VOTERS:
- To vote for a candidate, fill-in the rectangle next to the candidate's name. Do not vote for more than the number listed at the top of each contest.
- To vote for a qualified write-in candidate, fill-in the rectangle next to the qualified write-in line and print the candidate's name on the line.
- To vote for a measure, fill-in the rectangle next to the "YES" or "NO."
- If you make a mistake, you can get a new ballot from a pollworker or call the Registrar of Voters Office at 707-784-6675 for instructions. A mistake in one contest does not affect the rest of the ballot.
- You may vote in as many or as few contests as you want.
Fill-in the rectangle ■ that appears next to your choice.
RIGHT Wrong Wrong
Some contests may be presented out of order to accommodate the best layout for all contests.
Party-Nominated Offices
The party label accompanying the name of a candidate for party-nominated offices on the general election ballot means that the candidate is the official nominee of the party shown.
PRESIDENT OF THE UNITED STATES
President and Vice President
Vote for ONE (1) Party
CHASE OLIVER / MIKE TER MAAT — LIBERTARIAN
JILL STEIN / RUDOLPH WARE — GREEN
DONALD J. TRUMP / JD VANCE — REPUBLICAN
CLAUDIA DE LA CRUZ / KARINA GARCIA — PEACE AND FREEDOM
KAMALA D. HARRIS / TIM WALZ — DEMOCRATIC
ROBERT F. KENNEDY JR. / NICOLE SHANAHAN — AMERICAN INDEPENDENT
Qualified Write-in
Continue Voting in Next Column
Voter-Nominated and Nonpartisan Offices
Candidates display a party preference (or none) for the information of voters. This is not a party endorsement or approval. Candidates for nonpartisan offices do not display a party preference.
UNITED STATES REPRESENTATIVE
8th Congressional District
Vote for ONE (1)
JOHN GARAMENDI — Party Preference: Democratic; Member of Congress
RUDY RECILE — Party Preference: Republican; Business Owner / Consultant
UNITED STATES SENATOR
There are two U.S. Senate contests on this ballot:
- One for the regular 6-year term ending January 3, 2031 (Full-term).
- One for the remainder of the current term ending January 3, 2025 (Partial/Unexpired-term).
You may vote both contests.
United States Senator - Full-Term
Vote for ONE (1)
STEVE GARVEY — Party Preference: Republican; Professional Baseball Representative
ADAM B. SCHIFF — Party Preference: Democratic; United States Representative
United States Senator - Partial/Unexpired-Term
Vote for ONE (1)
STEVE GARVEY — Party Preference: Republican; Professional Baseball Representative
ADAM B. SCHIFF — Party Preference: Democratic; United States Representative
STATE SENATOR
3rd Senatorial District
Vote for ONE (1)
THOM BOGUE — Party Preference: Republican; City Councilman / Businessman
CHRISTOPHER CABALDON — Party Preference: Democratic; Educator / State Commissioner
Continue Voting on Back Side
Both Sides of the Ballot

SCHOOL MEASURES

Measure R - Travis Unified School District Bond Measure

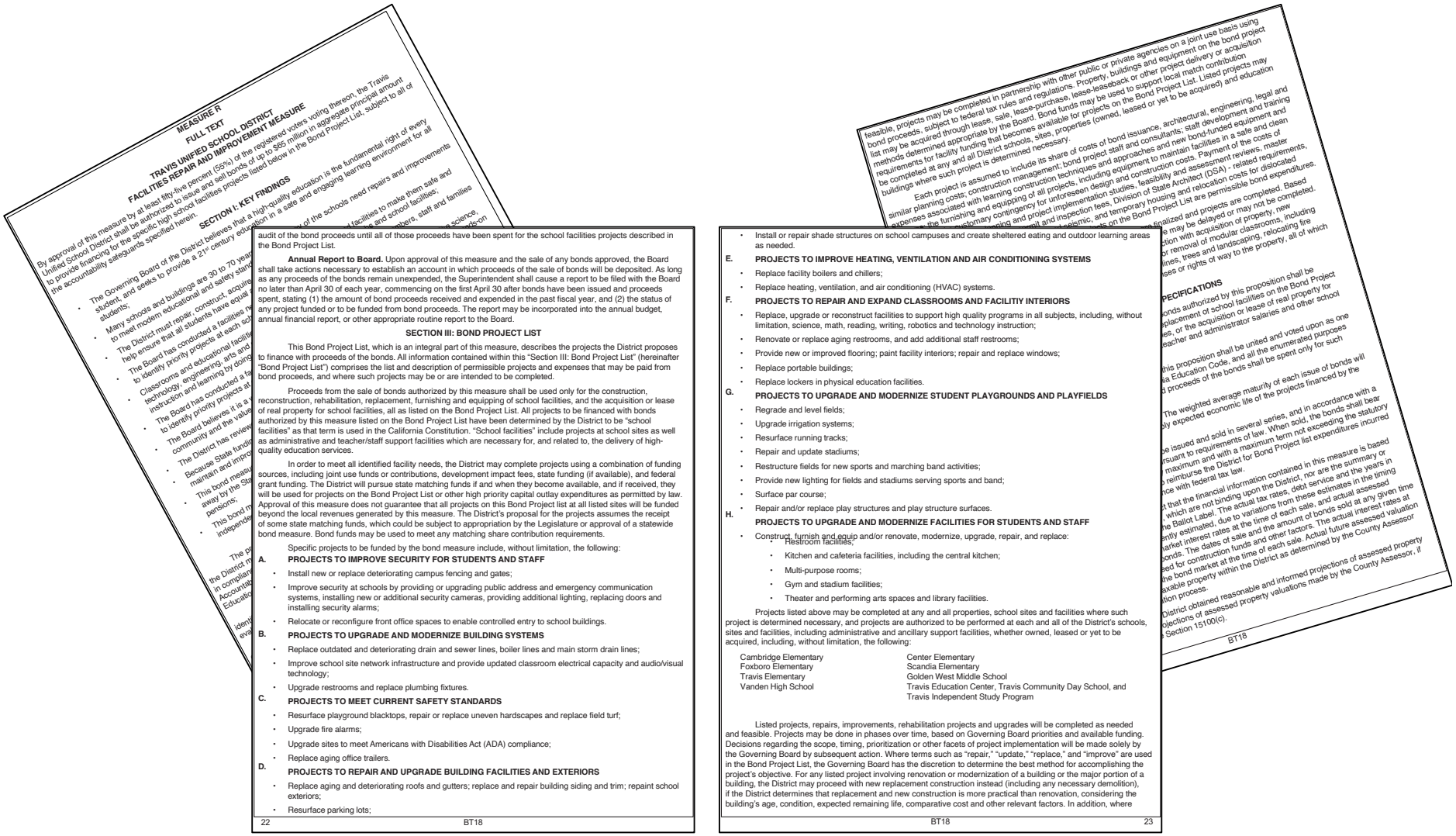
To repair aging schools, including replacing aging plumbing, electrical, lighting/ HVAC systems; repairing/ adding classrooms for science, technology, engineering, and math instruction; and improving campus security with fencing, cameras and lighting; shall the Travis Unified School District measure be adopted authorizing $65,000,000 in bonds at legal rates, levying 6¢ per $100 of assessed value, averaging $4,700,000 annually while bonds are outstanding, with independent citizen oversight, audits, no funds for administrators, and all funds for Travis Unified School District schools only?

☐ **BONDS - YES**

☐ **BONDS - NO**

✓ *More information at: https://www.travisusd.org/about-us/measure-r*

Full Text of Measure R . . .



audit of the bond proceeds until all of those proceeds have been spent for the school facilities projects described in the Bond Project List.

Annual Report to Board. Upon approval of this measure and the sale of any bonds approved, the Board shall take actions necessary to establish an account in which proceeds of the sale of bonds will be deposited. As long as any proceeds of the bonds remain unexpended, the Superintendent shall cause a report to be filed with the Board no later than April 30 of each year, commencing on the first April 30 after bonds have been issued and proceeds spent, stating (1) the amount of bond proceeds received and expended in the past fiscal year, and (2) the status of any project funded or to be funded from bond proceeds. The report may be incorporated into the annual budget, annual financial report, or other appropriate routine report to the Board.

SECTION III: BOND PROJECT LIST

This Bond Project List, which is an integral part of this measure, describes the projects the District proposes to finance with proceeds of the bonds. All information contained within this "Section III: Bond Project List" (hereinafter "Bond Project List") comprises the list and description of permissible projects and expenses that may be paid from bond proceeds, and where such projects may be or are intended to be completed.

Proceeds from the sale of bonds authorized by this measure shall be used only for the construction, reconstruction, rehabilitation, replacement, furnishing and equipping of school facilities, and the acquisition or lease of real property for school facilities, all as listed on the Bond Project List. All projects to be financed with bonds authorized by this measure listed on the Bond Project List have been determined by the District to be "school facilities" as that term is used in the California Constitution. "School facilities" include projects at school sites as well as administrative and teacher/staff support facilities which are necessary for, and related to, the delivery of high-quality education services.

In order to meet all identified facility needs, the District may complete projects using a combination of funding sources, including joint use funds or contributions, development impact fees, state funding (if available), and federal grant funding. The District will pursue state matching funds if and when they become available, and if received, they will be used for projects on the Bond Project List or other high priority capital outlay expenditures as permitted by law. Approval of this measure does not guarantee that all projects on this Bond Project list at all listed sites will be funded beyond the local revenues generated by this measure. The District's proposal for the projects assumes the receipt of some state matching funds, which could be subject to appropriation by the Legislature or approval of a statewide bond measure. Bond funds may be used to meet any matching share contribution requirements.

Specific projects to be funded by the bond measure include, without limitation, the following:

A. PROJECTS TO IMPROVE SECURITY FOR STUDENTS AND STAFF

- Install new or replace deteriorating campus fencing and gates;
- Improve security at schools by providing or upgrading public address and emergency communication systems, installing new or additional security cameras, providing additional lighting, replacing doors and installing security alarms;
- Relocate or reconfigure front office spaces to enable controlled entry to school buildings.

B. PROJECTS TO UPGRADE AND MODERNIZE BUILDING SYSTEMS

- Replace outdated and deteriorating drain and sewer lines, boiler lines and main storm drain lines;
- Improve school site network infrastructure and provide updated classroom electrical capacity and audio/visual technology;
- Upgrade restrooms and replace plumbing fixtures.

C. PROJECTS TO MEET CURRENT SAFETY STANDARDS

- Resurface playground blacktops, repair or replace uneven hardscapes and replace field turf;
- Upgrade fire alarms;
- Upgrade sites to meet Americans with Disabilities Act (ADA) compliance;
- Replace aging office trailers.

D. PROJECTS TO REPAIR AND UPGRADE BUILDING FACILITIES AND EXTERIORS

- Replace aging and deteriorating roofs and gutters; replace and repair building siding and trim; repaint school exteriors;
- Resurface parking lots;

- Install or repair shade structures on school campuses and create sheltered eating and outdoor learning areas as needed.

E. PROJECTS TO IMPROVE HEATING, VENTILATION AND AIR CONDITIONING SYSTEMS

- Replace facility boilers and chillers;
- Replace heating, ventilation, and air conditioning (HVAC) systems.

F. PROJECTS TO REPAIR AND EXPAND CLASSROOMS AND FACILITIY INTERIORS

- Replace, upgrade or reconstruct facilities to support high quality programs in all subjects, including, without limitation, science, math, reading, writing, robotics and technology instruction;
- Renovate or replace aging restrooms, and add additional staff restrooms;
- Provide new or improved flooring; paint facility interiors; repair and replace windows;
- Replace portable buildings;
- Replace lockers in physical education facilities.

G. PROJECTS TO UPGRADE AND MODERNIZE STUDENT PLAYGROUNDS AND PLAYFIELDS

- Regrade and level fields;
- Upgrade irrigation systems;
- Resurface running tracks;
- Repair and update stadiums;
- Restructure fields for new sports and marching band activities;
- Provide new lighting for fields and stadiums serving sports and band;
- Surface par course;
- Repair and/or replace play structures and play structure surfaces.

H. PROJECTS TO UPGRADE AND MODERNIZE FACILITIES FOR STUDENTS AND STAFF

- Construct, furnish and equip and/or renovate, modernize, upgrade, repair, and replace:
  - Restroom facilities;
  - Kitchen and cafeteria facilities, including the central kitchen;
  - Multi-purpose rooms;
  - Gym and stadium facilities;
  - Theater and performing arts spaces and library facilities.

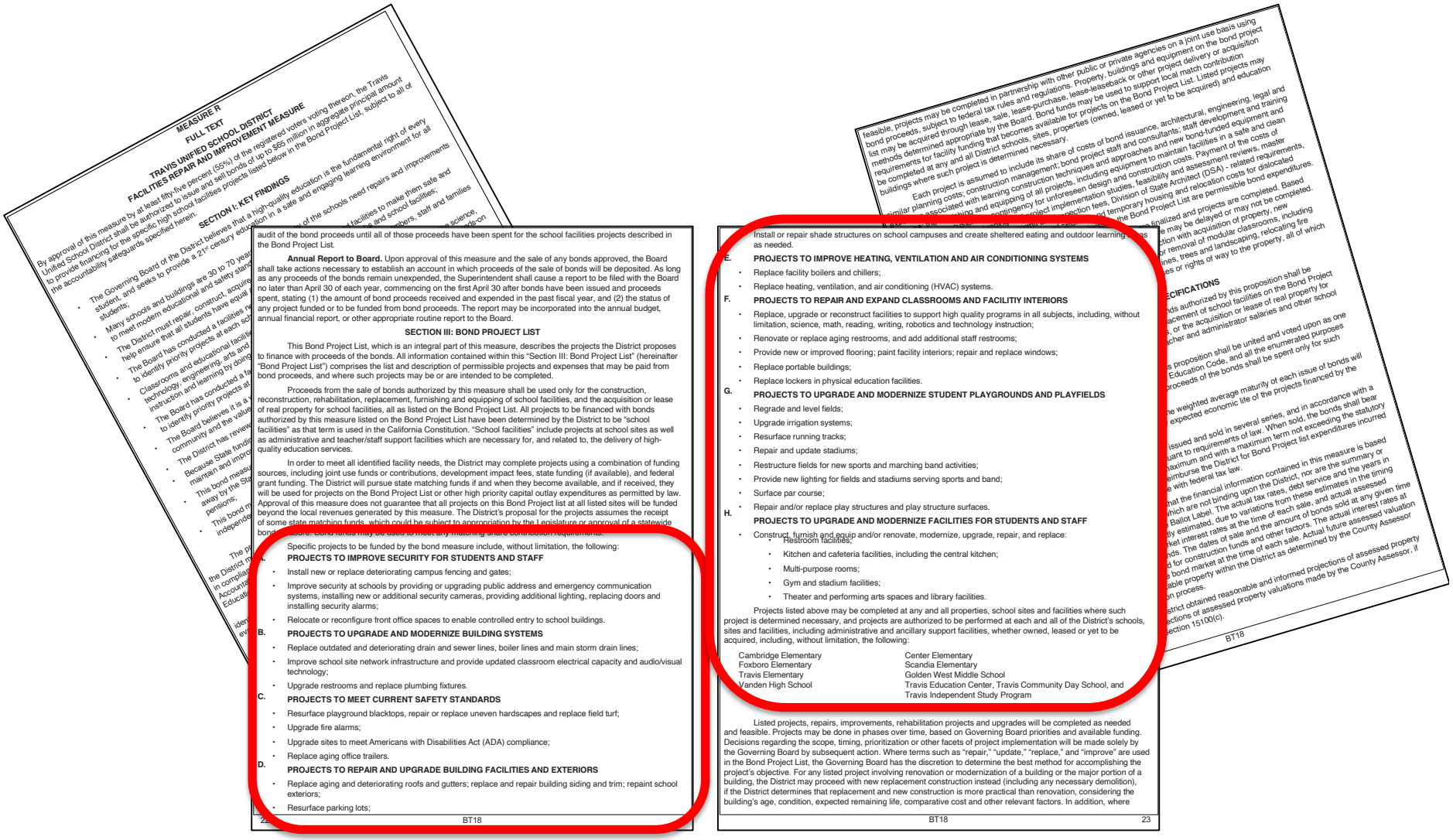
Projects listed above may be completed at any and all properties, school sites and facilities where such project is determined necessary, and projects are authorized to be performed at each and all of the District's schools, sites and facilities, including administrative and ancillary support facilities, whether owned, leased or yet to be acquired, including, without limitation, the following:

Cambridge Elementary	Center Elementary
Foxboro Elementary	Scandia Elementary
Travis Elementary	Golden West Middle School
Vanden High School	Travis Education Center, Travis Community Day School, and Travis Independent Study Program

Listed projects, repairs, improvements, rehabilitation projects and upgrades will be completed as needed and feasible. Projects may be done in phases over time, based on Governing Board priorities and available funding. Decisions regarding the scope, timing, prioritization or other facets of project implementation will be made solely by the Governing Board by subsequent action. Where terms such as "repair," "update," "replace," and "improve" are used in the Bond Project List, the Governing Board has the discretion to determine the best method for accomplishing the project's objective. For any listed project involving renovation or modernization of a building or the major portion of a building, the District may proceed with new replacement construction instead (including any necessary demolition), if the District determines that replacement and new construction is more practical than renovation, considering the building's age, condition, expected remaining life, comparative cost and other relevant factors. In addition, where

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Includes Project List



MEASURE R

FULL TEXT

TRAVIS UNIFIED SCHOOL DISTRICT

FACILITIES REPAIR AND IMPROVEMENT MEASURE

By approval of this measure by at least fifty-five percent (55%) of the registered voters voting thereon, the Travis Unified School District shall be authorized to issue and sell bonds of up to $65 million in aggregate principal amount to provide financing for the specific high school facilities projects listed below in the Bond Project List, subject to all of the accountability safeguards specified herein.

SECTION I: KEY FINDINGS

audit of the bond proceeds until all of those proceeds have been spent for the school facilities projects described in the Bond Project List.

Annual Report to Board. Upon approval of this measure and the sale of any bonds approved, the Board shall take actions necessary to establish an account in which proceeds of the sale of bonds will be deposited. As long as any proceeds of the bonds remain unexpended, the Superintendent shall cause a report to be filed with the Board no later than April 30 of each year, commencing on the first April 30 after bonds have been issued and proceeds spent, stating (1) the amount of bond proceeds received and expended in the past fiscal year, and (2) the status of any project funded or to be funded from bond proceeds. The report may be incorporated into the annual budget, annual financial report, or other appropriate routine report to the Board.

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In order to meet all identified facility needs, the District may complete projects using a combination of funding sources, including joint use funds or contributions, development impact fees, state funding (if available), and federal grant funding. The District will pursue state matching funds if and when they become available, and if received, they will be used for projects on the Bond Project List or other high priority capital outlay expenditures as permitted by law. Approval of this measure does not guarantee that all projects on this Bond Project list at all listed sites will be funded beyond the local revenues generated by this measure. The District's proposal for the projects assumes the receipt of some state matching funds, which could be subject to appropriation by the Legislature or approval of a statewide bond measure. Bond funds may be used to meet any matching share contribution requirements.

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B. PROJECTS TO UPGRADE AND MODERNIZE BUILDING SYSTEMS

- Replace outdated and deteriorating drain and sewer lines, boiler lines and main storm drain lines;
- Improve school site network infrastructure and provide updated classroom electrical capacity and audio/visual technology;
- Upgrade restrooms and replace plumbing fixtures.

C. PROJECTS TO MEET CURRENT SAFETY STANDARDS

- Resurface playground blacktops, repair or replace uneven hardscapes and replace field turf;
- Upgrade fire alarms;
- Upgrade sites to meet Americans with Disabilities Act (ADA) compliance;
- Replace aging office trailers.

D. PROJECTS TO REPAIR AND UPGRADE BUILDING FACILITIES AND EXTERIORS

- Replace aging and deteriorating roofs and gutters; replace and repair building siding and trim; repaint school exteriors;
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E. PROJECTS TO IMPROVE HEATING, VENTILATION AND AIR CONDITIONING SYSTEMS

- Replace facility boilers and chillers;
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H. PROJECTS TO UPGRADE AND MODERNIZE FACILITIES FOR STUDENTS AND STAFF

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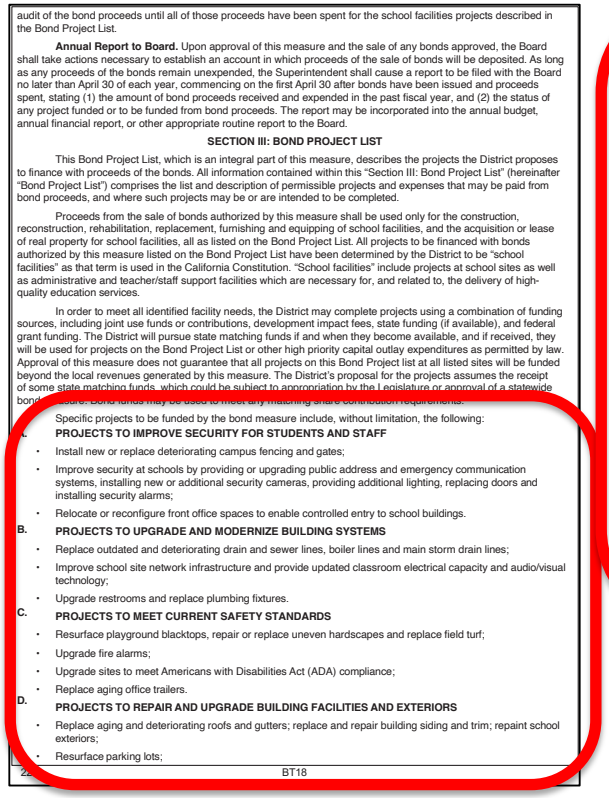
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Project List has 8 Categories of Projects



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- Projects to improve security for students and staff
- Projects to upgrade and modernize building systems
- Projects to meet current safety standards
- Projects to repair and upgrade building facilities and exteriors
- Projects to improve heating, ventilation and air conditioning systems
- Projects to repair and expand classrooms and facilitiy interiors
- Projects to upgrade and modernize student playgrounds and playfields
- Projects to upgrade and modernize facilities for students and staff

Tonight's Agenda

- Review November 5, 2024 Ballot Measure R
- Review the *Strict Accountability in Local School Construction Bonds Act of 2000*
- Next Steps

✓ *Questions welcome at all times.*



“Strict Accountability . . .

- *…in Local School Construction Bonds Act of 2000”*
- Today’s Law
  - Five methods of accountability
    - Citizens’ Oversight Committee
    - Performance Auditing
    - Financial Auditing
    - Court Restraint and Prevention of Any Expenditure of Funds
    - Law Enforcement Pursuit in the Event of Allegation or Misuse of Bond Funds



“Strict Accountability . . .

- *…in Local School Construction Bonds Act of 2000”*
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Citizens' Oversight Committee

- Purpose
  - "The purpose of the citizens' oversight committee shall be to inform the public concerning the expenditure of bond revenues. The citizens' oversight committee shall actively review and report on the proper expenditure of taxpayers' money for school construction."

✓ *Education Code 15278 (b)*



Citizens' Oversight Committee

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✓ *Education Code 15278 (b)*



Mission: Review

- What to review?
  - Bond expenditures
  - Performance audit
  - Financial audit



- What to compare against?
  - Ballot question
  - Bond project list



- Tips for reviewing:
  - What does each document tell you?
  - How are the documents prepared?
  - Audits are annual and to be provided by March 31 following the prior Fiscal Year
  - Responses to audit findings must be provided within 3 months

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Mission: Report



- What to report?
  - Conclusions based on review of:
    - Bond expenditures
    - Performance audit
    - Financial audit
  - Advise public on compliance with proper expenditures
- Tips for reporting:
  - Report to the community annually
  - Post on the Citizens' Bond Oversight Committee's web page:
    - Meeting agendas
    - Meeting minutes
    - Documents received
    - Annual report

✓ *Education Code 15280(b): All citizens' oversight committee proceedings shall be open to the public and notice to the public shall be provided in the same manner as the proceedings of the governing board of the district.*

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Proper Expenditures

- "Proper expenditure" means that expenditures . . .
  - are for 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 conform to list of the specific school facilities projects to be funded
  - do not include any teacher or administrative salaries or other school operating expenses

✓ *California Constitution Article XIII A, Section 1 (b) (3) and Education Code 15278 (b)*
  - *Note: 1978's Proposition 13 became Article XIII A of the California Constitution*

✓ *Resolution Ordering the Election for Measure which includes:*
  - *Ballot Question*
  - *Full Text Ballot Proposition (also includes Project List)*

Let's Take a Few Minutes…

- . . . to read the two pages of the Act describing the Citizens' Oversight Committee.



California LEGISLATIVE INFORMATION

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EDUCATION CODE - EDC
TITLE 1 GENERAL EDUCATION CODE PROVISIONS [1. - 32500] *(Title 1 enacted by Stats. 1976, Ch. 1010.)*
DIVISION 1 GENERAL EDUCATION CODE PROVISIONS [1. - 32500] *(Division 1 enacted by Stats. 1976, Ch. 1010.)*
PART 10. SCHOOL BONDS [15100 - 17199.6] *(Part 10 repealed and added by Stats. 1996, Ch. 277, Sec. 2.)*
CHAPTER 1.5. Strict Accountability in Local School Construction Bonds Act of 2000 [15264 - 15288] *(Chapter 1.5 added by Stats. 2000, Ch. 44, Sec. 3.)*

ARTICLE 2. Citizens' Oversight Committee [15278 - 15282] *(Article 2 added by Stats. 2000, Ch. 44, Sec. 3.)*

15278. (a) If a bond measure authorized pursuant to paragraph (3) of subdivision (b) of Section 1 of Article XIII A of the California Constitution and subdivision (b) of Section 18 of Article XVI of the California Constitution is approved, the governing board of the school district or community college shall establish and appoint members to an independent citizens' oversight committee, pursuant to Section 15282, within 60 days of the date that the governing board enters the election results on its minutes pursuant to Section 15274.

(b) The purpose of the citizens' oversight committee shall be to inform the public concerning the expenditure of bond revenues. The citizens' oversight committee shall actively review and report on the proper expenditure of taxpayers' money for school construction. The citizens' oversight committee shall advise the public as to whether a school district or community college district is in compliance with the requirements of paragraph (3) of subdivision (b) of Section 1 of Article XIII A of the California Constitution. The citizens' oversight committee shall convene to provide oversight for, but not be limited to, both of the following:

(1) Ensuring that bond revenues are expended only for the purposes described in paragraph (3) of subdivision (b) of Section 1 of Article XIII A of the California Constitution.

(2) Ensuring that, as prohibited by subparagraph (A) of paragraph (3) of subdivision (b) of Section 1 of Article XIII A of the California Constitution, no funds are used for any teacher or administrative salaries or other school operating expenses.

(c) In furtherance of its purpose, the citizens' oversight committee may engage in any of the following activities:

(1) Receiving and reviewing copies of the annual, independent performance audit required by subparagraph (C) of paragraph (3) of subdivision (b) of Section 1 of Article XIII A of the California Constitution.

(2) Receiving and reviewing copies of the annual, independent financial audit required by subparagraph (C) of paragraph (3) of subdivision (b) of Section 1 of Article XIII A of the California Constitution.

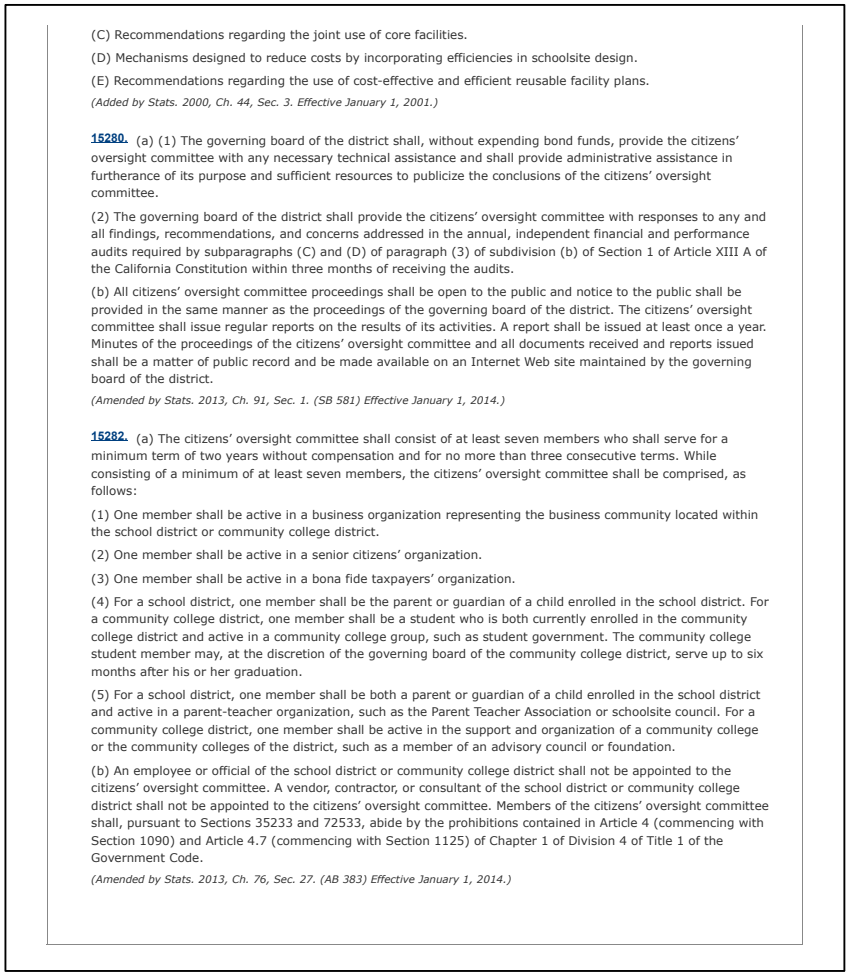
(3) Inspecting school facilities and grounds to ensure that bond revenues are expended in compliance with the requirements of paragraph (3) of subdivision (b) of Section 1 of Article XIII A of the California Constitution.

(4) Receiving and reviewing copies of any deferred maintenance proposals or plans developed by a school district or community college district, including any reports required by Section 17584.1.

(5) Reviewing efforts by the school district or community college district to maximize bond revenues by implementing cost-saving measures, including, but not limited to, all of the following:

(A) Mechanisms designed to reduce the costs of professional fees.

(B) Mechanisms designed to reduce the costs of site preparation.



(C) Recommendations regarding the joint use of core facilities.

(D) Mechanisms designed to reduce costs by incorporating efficiencies in schoolsite design.

(E) Recommendations regarding the use of cost-effective and efficient reusable facility plans.

(Added by Stats. 2000, Ch. 44, Sec. 3. Effective January 1, 2001.)

15280. (a) (1) The governing board of the district shall, without expending bond funds, provide the citizens' oversight committee with any necessary technical assistance and shall provide administrative assistance in furtherance of its purpose and sufficient resources to publicize the conclusions of the citizens' oversight committee.

(2) The governing board of the district shall provide the citizens' oversight committee with responses to any and all findings, recommendations, and concerns addressed in the annual, independent financial and performance audits required by subparagraphs (C) and (D) of paragraph (3) of subdivision (b) of Section 1 of Article XIII A of the California Constitution within three months of receiving the audits.

(b) All citizens' oversight committee proceedings shall be open to the public and notice to the public shall be provided in the same manner as the proceedings of the governing board of the district. The citizens' oversight committee shall issue regular reports on the results of its activities. A report shall be issued at least once a year. Minutes of the proceedings of the citizens' oversight committee and all documents received and reports issued shall be a matter of public record and be made available on an Internet Web site maintained by the governing board of the district.

(Amended by Stats. 2013, Ch. 91, Sec. 1. (SB 581) Effective January 1, 2014.)

15282. (a) The citizens' oversight committee shall consist of at least seven members who shall serve for a minimum term of two years without compensation and for no more than three consecutive terms. While consisting of a minimum of at least seven members, the citizens' oversight committee shall be comprised, as follows:

(1) One member shall be active in a business organization representing the business community located within the school district or community college district.

(2) One member shall be active in a senior citizens' organization.

(3) One member shall be active in a bona fide taxpayers' organization.

(4) For a school district, one member shall be the parent or guardian of a child enrolled in the school district. For a community college district, one member shall be a student who is both currently enrolled in the community college district and active in a community college group, such as student government. The community college student member may, at the discretion of the governing board of the community college district, serve up to six months after his or her graduation.

(5) For a school district, one member shall be both a parent or guardian of a child enrolled in the school district and active in a parent-teacher organization, such as the Parent Teacher Association or schoolsite council. For a community college district, one member shall be active in the support and organization of a community college or the community colleges of the district, such as a member of an advisory council or foundation.

(b) An employee or official of the school district or community college district shall not be appointed to the citizens' oversight committee. A vendor, contractor, or consultant of the school district or community college district shall not be appointed to the citizens' oversight committee. Members of the citizens' oversight committee shall, pursuant to Sections 35233 and 72533, abide by the prohibitions contained in Article 4 (commencing with Section 1090) and Article 4.7 (commencing with Section 1125) of Chapter 1 of Division 4 of Title 1 of the Government Code.

(Amended by Stats. 2013, Ch. 76, Sec. 27. (AB 383) Effective January 1, 2014.)

Review of Statutory Member Criteria

- At least 7 members, 5 of whom meet specified criteria
  - One member who is active in a business organization representing district's business community
  - One member who is active in a senior citizens' organization
  - One member who is active in a bona fide taxpayers' organization
  - One member who is a parent/guardian of child enrolled in district
  - One member who is both a parent/guardian of child enrolled in district and active in a parent-teacher organization or school site council



✓ *Education Code 15282(a)*

✓ *Note: these are diversity categories, not representatives*

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Common Challenges We Can Overcome

- Fulfilling the five required membership categories
- Term limits can contribute to vacancies and loss of expertise
- Lack of participation
  - Schedule needs to fit the work and fit the members
  - The work should be feasible and impactful

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Citizens' Oversight Committee Should Improve Outcomes

- Process should be oriented to meeting the letter of the law and be meaningful in terms of better results by some measure
- Process should be documented and periodically reconsidered
- Process should be developed by oversight committee and District staff, together
  - This will help to avoid technical violations of archaic rules

✓ *Oversight should be made feasible and produce an improved outcome:*

- *Efficient citizen oversight for routine decisions*
- *Community support for difficult decisions*
- *Positive relationships and community cohesiveness*

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Making Our Place The Best It Can Be



Tonight's Agenda

- Review November 5, 2024 Ballot Measure R
- Review the *Strict Accountability in Local School Construction Bonds Act of 2000*
- Next Steps

✓ *Questions welcome at all times.*



Next Steps

- If you are interested in serving, please apply:
  - https://www.travisusd.org/about-us/measure-r
    - Click button on right side of page to obtain Oversight Committee Application
    - Submit via email to Mr. Gabriel Moulaison
      - gmoulaison@travisusd.org
  - Questions can also be addressed to Mr. Moulaison
    - Email: gmoulaison@travisusd.org
    - Phone: (707) 437-4604, ext. 1299



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Questions?

