INTRODUCTION OF THE CITIZENS' BOND OVERSIGHT COMMITTEE BY STAFF

MEASURE O
RIVERSIDE UNIFIED SCHOOL DISTRICT

In 2017, Riverside Unified School District established an independent Citizens' Bond Oversight Committee to oversee Measure O funds and satisfy the accountability requirements of Proposition 39.

CBOC Duties Include:

1. The Committee shall inform the public concerning the District's expenditure of bond proceeds

2. Review expenditure reports produced by the District to ensure that bond proceeds were expended only for the purposes set forth in Measure O; and no bond proceeds were used for teacher or administrative salaries or other operating expenses in compliance Proposition 39

3. Present an annual report to the Board of Trustees, 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

MEASURE O CITIZENS' BOND OVERSIGHT COMMITTEE

ANNUAL REPORT PRESENTATION

2020-2021

Dr. Keith Nelson
CBOC Chair

Board of Education Meeting
November 17, 2022

CITIZENS' BOND OVERSIGHT COMMITTEE

JULY 1, 2020 – JUNE 30, 2021

2020-2021 Committee Members

1. Bob Garcia: 12/17/19 - 12/17/21
2. Dale Kinnear: 7/9/19 - 11/19/20*
3. David Bristow: 1/21/20 - 1/21/22
4. Diane Kwasman: 1/21/20 - 1/21/22
5. George Frahm: 10/2/18 - 10/2/20**
6. Janice Bielman: 8/21/18 - 8/21/20**
7. Jason Hunter: 8/21/18 - 8/21/20**
8. Jose Alcala: 8/21/18 - 8/21/20**
9. Keith Nelson: 12/17/19 - 12/17/21
10. Sarah Simpson: 1/21/20 - 1/21/22
11. Terry Walling: 12/17/19 - 12/17/21
12. Tina Grande-Field: 12/17/19 - 12/17/21
13. Tom Evans: 12/17/19 - 12/17/21
14. Amanda DeLaO: 1/21/21 - 1/21/23***
15. Art Alcaraz: 1/21/21 - 1/21/23***
16. Lara E. Martin: 1/21/21 - 1/21/23***
17. Marilyn Robinson: 1/21/21 - 1/21/23***
18. Martin De Campo: 1/21/21 - 1/21/23***

New Members Appointed During Preparation of Report

1. Beiwei Tu: 7/14/22 – 7/14/24
2. Cheryl Travaglione: 7/14/22 - 7/14/24
3. Douglas Kroon: 2/24/22 - 2/24/24
4. Jessica Gomez: 7/14/22 - 7/14/24
5. Sandra Roy: 7/14/22 - 7/14/24

Support Staff

Renee Hill, District Superintendent
Tim Walker, Deputy Superintendent
Sergio San Martin, Assistant Superintendent Operations
Ana Gonzalez, Director, Planning and Development
Samir Arreola, Administrative Assistant

Notes:

*Resigned 11/19/20 **
*Termed Out ***
*Members who joined in 2020-21****

COMMITTEE ACTIVITIES

The committee conducted quarterly business meetings, including reviewing facilities projects and project expenditures.

- The committee met 17 times from 2017 through 2021.
- All meetings conducted during this time period were held virtually. At every meeting, staff provided a report on the status of projects and project financials.
- At every meeting, the committee encouraged public input related to Measure O funding allocation concerns. These concerns were and will continue to be discussed by the committee as brought forth during public comment.
- The committee reviewed the independent performance and financial audits.
- The committee is invited to project information meetings, Board Study Session meetings, and regular Board meetings when Measure O Bond projects are presented. However, due to the pandemic restriction, in-person meetings and project site tours were postponed.

GENERAL NOTES AND COMMITTEE FINDINGS

- August 26, 2020 virtual meeting, the committee was notified by a member of the public that the posting for public access was not available; therefore, the meeting concluded.

- The committee inquired whether solar was being added to school sites. The response was no, the majority of schools are under the city's public utilities, and payback from converting to solar is not advantageous as it would be if they were under Southern California Edison.

- The committee inquired whether additional security was being provided for active shooters. The response was that security is handled during the design phase; some schools have added infrastructure for cameras and other types of measures for security.

GENERAL NOTES AND COMMITTEE FINDINGS Cont.

- The committee inquired why North High School moved up on the project list at the September 10, 2020 Board meeting. The response was that the Board of Education reviewed the project list and made some modifications accordingly to the order of projects.

- Regarding the Eastside Neighborhood School, a question was raised by the committee regarding the closing of Park Avenue, the expansion of the Metrolink, and the impact on the bus station adjacent to the school's proposed location. The response was that the city has a process that must be followed to vacate a street for a school. The impact on traffic will be studied, and the school district will work with the city, RCTC, and surrounding businesses to find a resolution that works for everyone.

- Other sources of revenue also fund Measure O projects (e.g., CFD, developer fees, federal, and funding from the State of California). The committee receives information on the different funding sources as requested.

GENERAL NOTES AND COMMITTEE FINDINGS Cont.

- Although resolved with the Board recently, there were concerns by the committee during this time period about being left shorthanded regarding committee member vacancies and imminent term expirations. Specifically, there was concern about representation and how members term off and how they are selected. As a result, there will be a continued examination on how to best fill vacancies timely with consideration toward classification and trustee areas.

- We reviewed the expenditures and found that funds were spent in accordance to Article XIIIA, Section 1(b)(3) of the California Constitution and funds were not allocated or expended for any teacher or administrative salaries or other school operating expenses.

- The Committee has determined that these funds are being judiciously used and recommends that RUSD continue with fund accountability procedures.

FUND SUMMARY

	2020/2021 Measure O Fund Summary
Measure O Beginning Balance	$185,604,492.94
2020/2021 Cumulative Interest & Transfers	$889,569.99
Total Measure O Funds	$186,494,062.93

	Expenditures	Remaining Balance
Measure O Expenditures:	$73,472,009.89	$113,022,053.04

Data Source: Key Analytics Annual Report

QUESTIONS & ANSWERS

CITIZENS BOND OVERSIGHT COMMITTEE

Measure O

Annual Report

Covering Fiscal Year Reporting
July 1, 2020 - June 30, 2021

Poly High School Quad

Arlington High School BioMed

CBOC Member

Current Members

Keith Nelson, Chair

Jessica Gomez, Vice Chair

Amanda DeLaO, Member

Art Alcaraz, Member

Beiwei Tu, Member

Cheryl Tavaglione, Member

Douglas Kroon, Member

Lara E. Martin, Member

Marilyn Robinson, Member

Martin De Campo, Member

Sandra Roy, Member

Terry Walling, Member

Tina Grande-Field, Member

20/21 Past Members

Bob Garcia, Member

Dale Kinnear, Member

David Bristow, Member

Diane Kwasman, Member

George Frahm, Member

Janice Bielman, Member

Jason Hunter, Member

Jose Alcala, Member

Sarah Simpson, Member

Tom Evan, Member

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Executive Summary

The Riverside Unified School District (RUSD) was successful passing Measure O General Obligation Bond on November 8, 2016. With a 70% approval rate, the voters approved to issue up to $392,000,000 as the principal amount for the District's school facilities bond (Measure O). Measure O will generate the dollars over the next 10 to 15 years to improve existing school facilities and build new capital facilities in Riverside Unified School District.

The Long Range Facility Master Plan completed in 2016 serves as the guide to plan projects based on condition, educational program, capacity needs, and available state funding. The Board of Education held three workshops to discuss the needs of district facilities and identify priorities. The workshops primarily focused on educating the Board and public on the prioritization process, providing data on the facilities, determining focus goals, and identifying priority projects.

2016 Ballot Measure O

The following is the ballot measure summary presented to the voters by the Riverside Unified School District.

"To repair and upgrade Riverside schools, including deteriorating roofs, plumbing and electrical systems, improve student safety, security, and seismic safety, upgrade classrooms, science labs, career-training facilities, computer systems and instructional technology to support student achievement in math, science, engineering and skilled trades, and construct, acquire, repair classrooms, sites, facilities and equipment, shall Riverside Unified School District issue $392 million in bonds at legal rates, with citizen oversight, no money for administrator salaries, all money staying local?"

To view the full ballot proposition:

http://riversideunified.org/common/pages/DisplayFile.aspx?itemId=14033820

Purpose of the Committee

Pursuant to Section 15278 of the Education Code, the District is obligated to establish an independent Citizens' Bond Oversight Committee (CBOC) in order to satisfy the accountability requirement of Prop. 39. The Board of Education approved the appointment of the CBOC at its March 20, 2017 Board meeting.

The purpose of the Citizens' Bond Oversight Committee (CBOC) shall be to inform the public concerning the expenditure of the bond proceeds. The CBOC will review bond program expenditures and outside audits to make sure the will of the voters is strictly followed in accordance with the wording of the original ballot measure.

To carry out its stated purpose, the Committee shall perform the duties set forth in the CBOC bylaws as listed below:

3.1 Inform the Public. The Committee shall inform the public concerning the District's expenditure of bond proceeds. In fulfilling this duty, all official communications to either the Board or the public shall come from the Chair acting on behalf of the Committee. The Chair shall only release information that reflects the majority view of the Committee.

3.2 Review Expenditures. The Committee shall review expenditure reports produced by the District to ensure that (a) bond proceeds were expended only for the purposes set forth in Measure O; and (b) no bond proceeds were used for teacher or administrative salaries or other operating expenses in compliance with Attorney General Opinion 04-110, issued on November 9, 2004.

3.3 Annual Report. The Committee shall present to the Board, in public session, an annual written report for Measure O, 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.

Committee Membership

The Committee is composed entirely of District residents, including those with experience in business, government, finance and education, as well as parents of Riverside Unified School District children, a member of a taxpayer association, and member of senior citizens' community, and parent-teacher organizations.

Committee Activities

In accordance with the provisions of the Ralph M. Brown Public Act, the committee conducts meetings for the public's attendance and participation. Meeting agendas and notices are sent to committee members and posted 72 hours in advance of the meeting. Notices are posted at the Riverside Unified School District office, Business office, Facilities Planning and Development office and on the district website. Meeting notices, agenda, minutes and all other documents received by the committee are a matter of public record and are available on the Riverside Unified School District website:

http://riversideunified.org/cms/One.aspx?portalId=580805&pageId=2305262

The Committee conducts quarterly business meetings, which included review of facilities projects and project expenditures. The Citizens' Bond Oversight Committee held meetings on the following dates:

- June 7, 2017 at 4:30pm at the District Office
- October 4, 2017 at 4:30pm at the District Office
- February 7, 2018 at 4:30pm at the District Office
- April 10, 2018 at 4:30pm at the District Office
- July 31, 2018 at 4:30pm at the District Office
- October 9, 2018 at 4:30pm at the District Office
- February 12, 2019 at 4:30pm at the District Office
- May 29, 2019 at 4:30pm at the District Office
- August 21, 2019 at 4:30pm at the District Office
- October 30, 2019 at 4:30pm at Nutrition Services Training Room
- January 29, 2020 at 4:30pm at Highgrove Elementary School
- May 27, 2020 at 4:30pm through Zoom as a Virtual Meeting

School Year 20/21

- August 29, 2020 at 4:30pm through Zoom as a Virtual Meeting
- September 10, 2020 at 4:30pm through Zoom as a Virtual Meeting
- January 29, 2021 at 4:30pm through Zoom as a Virtual Meeting
- February 26, 2021 at 4:30pm through Zoom as a Virtual Meeting
- April 28, 2021 at 4:30pm through Zoom as a Virtual Meeting

2020/2021 School Year Roster

	Name	Group Representation	Term	Year
1	Bob Garcia	Senior Citizen Organization	2 year term	12/17/19 - 12/17/21
2	Dale Kinnear*	Community Member	2 year term	7/9/19 - 7/9/21
3	David Bristow	Parent Active in PTA	2 year term	1/21/20 - 1/21/22
4	Diane Kwasman	Parent Active in PTA	2 year term	1/21/20 - 1/21/22
5	George Frahm**	Community Member	2 year term	10/2/18 - 10/2/20
6	Janice Bielman **	Business Representative	2 year term	8/21/18 - 8/21/20
7	Jason Hunter **	Taxpayer Organization	2 year term	8/21/18 - 8/21/20
8	Jose Alcala **	Community Member	2 year term	8/21/18 - 8/21/20
9	Keith Nelson	Community Member	2 year term	12/17/19-12/17/21
10	Sarah Simpson	Community Member/Parent	2 year term	1/21/20 - 1/21/22
11	Terry Walling	Community Member	2 year term	12/17/19-12/17/21
12	Tina Grande-Field	Community Member	2 year term	12/17/19-12/17/21
13	Tom Evans	Community Member	2 year term	12/17/19-12/17/21
14	Amanda DeLaO***	Parent and Community	2 year term	1/21/21-1/21/23
15	Art Alcaraz***	Community Member	2 year term	1/21/21-1/21/23
16	Lara E. Martin***	Business Reresentative	2 year term	1/21/21-1/21/23
17	Marilyn Robinson***	Taxpayer Organization	2 year term	1/21/21-1/21/23
18	Martin De Campo***	Parent Active in PTA	2 year term	1/21/21-1/21/23

* Resigned 11/19/20
**Termed Out
***Members who joined in 20-21

All meetings conducted during this time period were done so virtually. At every meeting, staff reports the status of projects and project financials.

At every meeting, the committee has encouraged community input related to concerns with Measure O funding allocation. These concerns have and will continue to be discussed by the committee as brought forth in public comment.

An independent performance and financial audit was reviewed by the committee.

The Committee was to be invited to Town Hall meetings, Board Study Session meetings, and regular Board meetings when Measure O Bond projects were discussed. However, due to the lockdown, this did not occur. Site visits were also suspended due to the lockdown.

Committee Findings

August 26, 2020 virtual meeting, the committee was notified by a member of the public that the posting for public access was not available; therefore, the meeting concluded.

The committee inquired as to whether the district saves money by retiring portables. The response to the committee was that the district owns the portables; therefore, there are no savings.

The committee inquired as to whether solar was being added to at school sites. The response was no, the schools are under the city's public utilities, and payback from converting to solar is not advantageous as it would be if they were under Southern California Edison.

The committee inquired as to whether additional security is being provided for active shooters. The response was that security is handled in the design phase; some schools have added infrastructure for cameras and other types and measures of security.

The committee inquired as to why North High School moved up on the project list at the September 10, 2020 meeting? The response was that the Board of Education reviewed the project list and the cash flow and made some modifications to the order of projects while waiting for state funds. There are funds for the planning stage of North High School, but the construction phase will have to wait until more bonds are sold in 2022 or 2023.

With regard to the Eastside Neighborhood School, concern was raised by the committee as to the closing of Park Avenue, the expansion of the Metro Link, and the impact on the bus station that is adjacent to the proposed location of the school. The response was that the city has a process that must be followed to vacate a street for a school. The impact on traffic will be studied and the school district will work with the city, metro link, and surrounding businesses to find a resolution that works for everyone.

Measure O projects are also funded by other sources of revenue (e.g., Mello-Roos, developer fees, and funding from the State of California). The committee receives information on the different funding sources as requested.

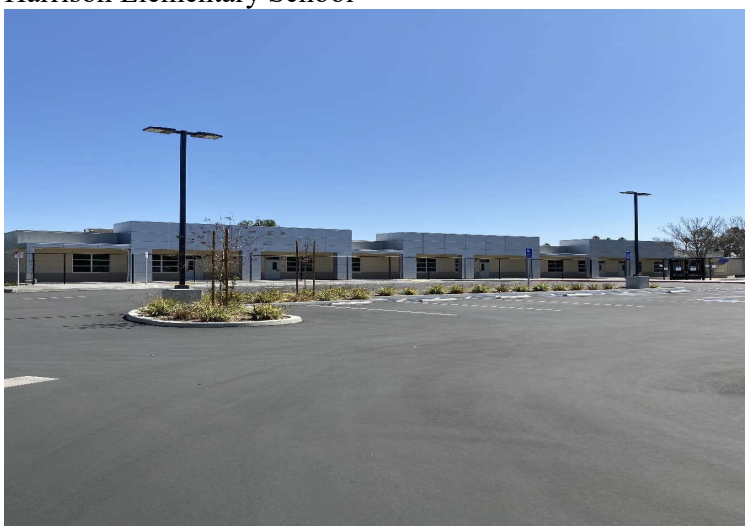
Although resolved with the Board recently, there were concerns by the committee during this time period about being left shorthanded with regard to committee member vacancies and imminent term expirations. Specifically, there was concern about representation and how members term off and are selected. There will be continued examination of how to best fill vacancies timely with consideration towards classification and trustee areas.

Projects Completed Photos

Sierra Middle School

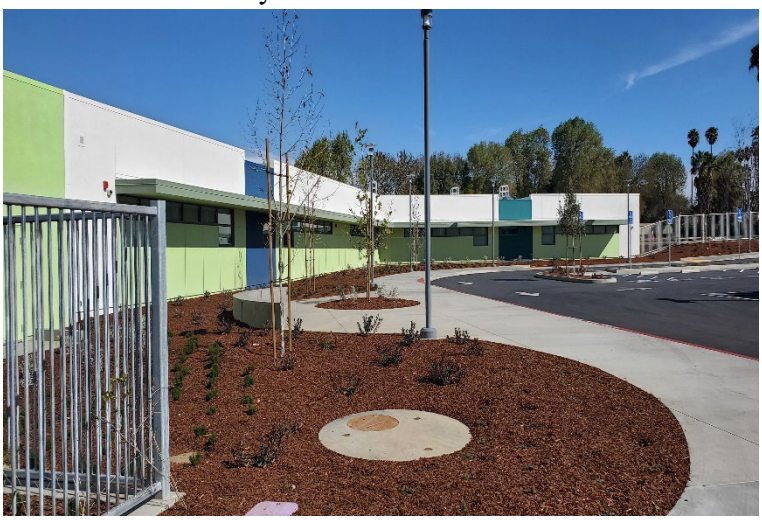
Highgrove Elementary School

Harrison Elementary School



Jefferson Elementary School

Madison Elementary School



Adams Elementary School

Projects Completed Photos….

Sunshine Early Childhood Center

Magnolia Elementary School

Jackson Elementary School

Poly High School

Arlington High School

Alcott Elementary School

Citizens' Bond Oversight Committee Statement

The Riverside Unified School District Citizens' Bond Oversight Committee submits this Annual Report to the Board of Education in conformance with the standards of the Strict Accountability in Local School Construction Bond Act also known as Proposition 39.

Respectfully Submitted,

_____

Keith Nelson, Chairperson
Citizens' Bond Oversight Committee
Riverside Unified School District

MEASURE O 2020/2021 FISCAL YEAR PROJECT EXPENDITURES

No.	District Project Name	Measure O CUMULATIVE Project Expenditures	Project Phase/Status
GROUP A PROJECTS			
1	Harrison Elementary School	($1,128,556.64)	Completed
2	Highgrove Elementary School	(1,904,799.34)	Completed
3	Jefferson Elementary School	(3,249,696.65)	Completed
4	Madison Elementary School	(5,958,006.67)	Completed
5	Sierra Middle School	(92,629.15)	Completed
	GROUP A PROJECT TOTALS:	($12,333,688.45)	
GROUP B PROJECTS			
6	Alcott Elementary School	($2,325,085.77)	Completed
7	Jackson Elementary School	(11,868,096.27)	Completed
8	Monroe Elementary School	(2,949,332.62)	Construction
9	Sunshine Early Childhood Center	(2,499,052.29)	Completed
10	Poly High School	(12,825,474.11)	Completed
	GROUP B PROJECT TOTALS:	($32,467,041.06)	
GROUP C PROJECTS			
11	Adams Elementary School	($7,549,064.28)	Completed
12	Fremont Elementary School	(661,082.41)	Construction
13	Longfellow Elementary School	(969,917.39)	Construction
14	Magnolia Elementary School	(6,704,510.66)	Completed
15	University Middle School	(12,500.00)	Construction
16	Arlington High School	(9,947,863.33)	Completed
	GROUP C PROJECT TOTALS:	($25,844,938.07)	
Groups D, E, F, & H and Expanded Projects			
17	Bryant Elementary School	($161.01)	Dormant
18	Casa Blanca Neighborhood School	(155,216.18)	Planning
19	Eastside Neighborhood School	(1,459,758.60)	Planning
20	Highgrove II Neighborhood School	(14,375.00)	Planning
21	King High School	(264,967.90)	Dormant
22	North High School	(145,250.00)	Planning
23	STEM Education Center	8,645.77	Planning
24	Facilities Projects	(795,259.39)	Ongoing
	GROUPS D, E, F, & H AND EXPANDED PROJECT TOTALS:	($2,826,342.31)	
	MEASURE O CUMULATIVE PROJECT EXPENDITURES:	($73,472,009.89)	

KeyAnalytics - *California Financial Services*

District Financials as of 6/30/2021

PERFORMANCE & FINANCIAL AUDIT REPORTS

Financial and Performance Audit Report:

20-21 FY

https://www.riversideunified.org/common/pages/DisplayFile.aspx?itemId=17120698

19-20 FY

https://riversideunified.org/common/pages/DisplayFile.aspx?itemId=15819381

18-19 FY

https://www.riversideunified.org/common/pages/DisplayFile.aspx?itemId=22071346

17-18 FY

https://www.riversideunified.org/common/pages/DisplayFile.aspx?itemId=22071348

16-17 FY

https://www.riversideunified.org/common/pages/DisplayFile.aspx?itemId=22073298