Simi Valley Schools
SIMI VALLEY UNIFIED SCHOOL DISTRICT

Measure X – CBOC

CITIZENS' BOND OVERSIGHT COMMITTEE

SVUSD District Office – Training Center
101 West Cochran Street
Date: May 28, 2025
Time: 6:00 pm

Please contact lori.rubenstein@simivalleyusd.org if you wish to attend this meeting and have not been invited.

Amended Meeting Minutes - May 28, 2025

I. Call to Order **Time 6:05 pm by Rebecca Hopkins**

II. Roll Call

Present:

Committee Members:
- Rebecca Hopkins, Chair
- Jonathan Bonesteel, Vice Chair
- Jay Patel (arrived at 6:10 pm)
- Steve Silverman
- Bethany Lowry
- Ellen Plummer

Other Attendees:
- Lori Rubenstein, Bond Program Manager
- Debbie Nelson, Administrative Asst. for Bond
- Susan Stevenson, Accountant for Bond

Absent:
- Elisse Sherman, Publicity Chair
- Larry Borovay
- Anthony Angelini
- Ron Todo, Asst. Superintendent of Business & Facilities
- Pedro Avila, Director of Facilities and Planning
- Jake Finch, Public Information Officer
- David Pegg, Construction Project Manager

III. Pledge of Allegiance: **Lead By: Rebecca Hopkins**

IV. Approval of Minutes: March 19, 2025

Under Action Items c) CBOC Officers for next year, a typo was discovered in the term lengths agreed upon by Ms. Hopkins, Mr. Bonesteel, and Mrs. Sherman. Each had agreed to an additional 2-year term, however the meeting minutes incorrectly reflected 1-year. The meeting minutes have been corrected.

A motion was made to approve the minutes of March 19, 2025, as amended.

Motion: Ellen Plummer	Second: Jonathan Bonesteel	Vote: 4 – Approved/2 Abstained (Bethany Lowry, Ellen Plummer) – Motion Passed

V. Public Comments

None.

VI. Information Items:

a) Welcome new CBOC members

Anthony Angelini (Absent)
Bethany Lowry
Ellen Plummer

Anthony Angelini was absent, however, new committee members Bethany Lowry and Ellen Plummer were introduced and welcomed to the committee by Ms. Hopkins. All committee members took a turn introducing themselves and gave a brief description of their background.

Ms. Rubenstein stated now there are nine members, necessitating a minimum of five in attendance at the meetings in order to create a quorum. The minimum number of members required to be maintained on the committee in order to remain compliant with the state is seven.

b) Ongoing Projects:

Big Springs – Classroom Renovation – Design
Garden Grove – Classroom Renovation – Construction
Hollow Hills – Classroom Renovation – Design
Hollow Hills - Floor Abatement – Construction
Simi Valley - MPR Demo Phase II and Utility Bldg - Construction
Simi Valley – MPR - DSA
Sycamore – Classroom Renovation – Construction
Township – Classroom Renovation - Design
Campus Wide Notification Project
- Phase 4 – 3 Sites – Sinaloa, Valley View, Hillside - Close Out
- Phase 5 – Simi Valley HS, Santa Susana HS, Township ES, Hollow Hills ES – Close Out
- Phase 6 – Atherwood, Katherine, Knolls, Santa Susana ES, Big Springs, White Oak – Construction
- Phase 7 – Berylwood, Crestview, Garden Grove, Justin, Mountain View, Sycamore – Construction
- Phase 8 – Apollo, Arroyo, Madera, Monte Vista, Simi Institute (SICE), Wood Ranch – Construction

Ms. Rubenstein went over the above list of projects. She pointed out that there are five remaining elementary schools that are being renovated – Big Springs, Garden Grove, Hollow Hills, Sycamore, and Township. Of the five, Garden Grove and Sycamore are beginning construction this summer. The remaining three (Big Springs, Hollow Hills, and Township) are currently in the design phase, however, Hollow Hills is having its floor abated this summer while awaiting design approval. All five elementary schools will be receiving new furniture over this summer.

She further stated that the Simi Valley HS (SVHS) MPR, phase 2, and utility building are due to begin construction this June, and that the remaining Campus Notification Projects (phases 6, 7, and 8) are in construction, with phases 4 and 5 in close out.

Mr. Bonesteel voiced interest in receiving more information on the SVHS MPR with regards to the number of Division of the State Architect (DSA) comments received and when it would be approved. Ms. Rubenstein said approval would hopefully come in July and that there were numerous structural comments. She further stated that the hope is to begin bidding by the end of June, in anticipation of DSA approval in July, so there won't be any delays in starting construction. She added that contingencies will be included.

Ms. Hopkins inquired whether the Campus Notification Project included all SVUSD school campuses, to which Ms. Rubenstein confirmed that is correct, all campuses were included in the project.

VII. Discussion Items

a) Communication – **Tabled until the September 17th meeting due to Mrs. Sherman's absence.**

b) Annual Report

i) 2023 - 2024 Annual Report – For the 6/10/25 BOE

Everyone was given a draft of the annual report for review. Ms. Rubenstein reminded the committee that they need to present the report at the June 10th Board meeting. After a brief discussion, it was decided that Mr. Bonesteel would be the one to present the report. Ms. Hopkins stated that she would not be attending the meeting.

Mr. Bonesteel shared some charts that he had created based on the data received from Ms. Rubenstein, and that he would like to incorporate them into the final report. One chart reflects the needs of the District, the amount of the bond, the funds utilized, and the additional funds needed due to DSA expenses. The second chart depicts the costs incurred due to DSA. The third chart shows the completed projects that did not require DSA review and, therefore, came in under budget.

Ms. Hopkins added that the majority of the DSA costs were a result of the damage the SVHS MPR sustained due to the 1994 earthquake.

Ms. Plummer questioned whether there was a project prioritization list, to which Ms. Rubenstein replied that there were certain projects that were listed in the promotion of the bond as

modernization projects. Mr. Bonesteel added that as costs increased, some projects were put on hold.

Mr. Patel questioned the use of additional matching funds as discussed during a prior CBOC meeting, and what happens to those funds once they're received. Ms. Rubenstein explained that the District applies for the additional funds whenever possible, but it takes 3-5 years before the money is awarded. When the District does receive matching funds, it's put into an account that is used for construction; there are certain rules that must be followed as to how the money can be spent, and one of the rules is that it must be used for construction or modernization.

Mr. Patel further questioned whether the state gives any funding to schools in general, to which Ms. Rubenstein replied that the state does not provide funding for construction, that's why schools need to use bonds. She further stated that the state requires earthquake retrofitting for any modernization projects.

A motion was made to approve the annual report as amended with the addition of the charts Mr. Bonesteel shared at the meeting.

Motion: Ellen Plummer Second: Bethany Lowry Vote: 6/0 – Motion Passed

VIII. Action Items

a) Membership Categories:

Simi Valley Schools
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										
	One (1) Year	Two (2) Year	One (1) Year	Two (2) Year	One (1) Year	Two (2) Year	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
Anthony Angelini							05/20/25			X		X			X
Jonathan Bonesteel		X		X			11/21/22	11/30/2026	Vice Chair				X	X	
Larry Borovay		X		X			06/14/22	6/24/26		X					
Rebecca Hopkins	X			X		X	08/17/21	9/30/26	Chair			X	X		
Bethany Lowry							05/20/25			X			X	X	X
Jayesh Patel		X		X			08/17/21	9/30/25							X
Ellen Plummer							05/20/25						X	X	
Elisse Sherman		X		X			11/15/22	11/30/26	Publicity Chair				X	X	X
Steve Silverman		X					12/12/23	12/12/2025			X				

California Education Code 15282: The Committee shall consist of at least seven (7) members, who shall serve for a minimum term of two years and for no more than three consecutive terms. Committee shall have one member from each of the REQUIRED CATEGORIES

	(1) Parent or Guardian of a Child Enrolled in the District
	(1) Parent or guardian of a child enrolled in the District and active in a parent - teacher organization, such as P.T.A
	(1) Active in a buisness organization representing the buiness community located in the District
	(1) active in a senior citizens' organization
	(1) acative in a bona-fide taxpayers association
	(2) members of the community at large

A majority of the number of Committee members shall constitute a quorum for the transaction of any business

b) Review term length options for new members to see whether they prefer a one-year or two-year term.

Both Ellen Plummer and Bethany Lowry agreed that they would like to volunteer for a two-year term.

c) Review members who are terming out in September to see whether they wish to extend their term. – **Tabled until the September 17th meeting**

d) CBOC Officers for next year: **Table until the September 17th meeting.**

Secretary -

Motion: Second: Vote:

e) Proposed CBOC Meeting Dates for Next Year:

September 17, 2025; November ~~12~~ 19, 2025;
March 18, 2026; May 27, 2026

A motion was made to approve next year's meeting dates as amended above.

Motion: Bethany Lowry Second: Jonathan Bonesteel Vote: 6/0 – Motion Passed

IX. New Business

a) Recruitment of new members.

Ms. Rubenstein addressed the committee stating that if any of them knows of anyone who would like to become a CBOC member, to please let her know.

Mr. Bonesteel explained the importance of having a diverse group, as represented in the membership chart, so that information can be disseminated to community members, as well as sharing differing viewpoints from the various groups within the community. It's important to get the word out on how funds are being used and what still needs to be done.

Ms. Plummer questioned whether a new bond in the future would necessitate a new CBOC, or if the current one would still be in use. Ms. Rubenstein stated that a new one would need to be formed.

Mr. Patel inquired what the amount of a new bond would be, and if it would cover this bond's shortfall. Ms. Rubenstein stated that there is no way to predict the amount of a new bond, as many factors are taken into consideration before an amount can be determined. Ms. Hopkins noted that there isn't a shortfall, just not enough money to complete all the projects that are needed within the district.

Ms. Plummer asked when the funds of the current bond are expected to be depleted, to which Ms. Hopkins replied, 2028. Ms. Rubenstein added that there is currently a $4 million shortage needed to complete the SVHS MPR, however, if necessary, the funds can be used from a

modernization fund account. Mr. Patel questioned where the state gets the money for Prop 2, for state matching funds. Ms. Rubenstein pointed out that the funds come from state taxes. Ms. Hopkins questioned whether all projects have a Guaranteed Maximum Price (GMP), to which Ms. Rubenstein replied, only lease-lease back projects which for now is only the SVHS MPR. Mr. Patel questioned whether the people who pay for the bonds receive a refund when the district receives matching funds. Ms. Rubenstein and Mrs. Stevenson both said that is not the case. The money is deposited into an account that can only be used for construction and modernization.

X. Next Meeting

Date: September 17, 2025 (tentatively) **Time:** 6:00 pm **Location:** District Office – Training Room

XI. Other Business

a) Regular Board of Education meetings:

June 10, 2025 (CBOC Present the Annual Report)	August 19, 2025
September 9, 2025	October 21, 2025

b) Tentative Dates for Upcoming CBOC meetings:

September 17, 2025;	November 19, 2025;
March 18, 2026;	May 27, 2026

c) Presentation of the Annual Report at the June 10, 2025 BOE Meeting.

XII. Adjournment

Time **7:10 pm** **by** **Rebecca Hopkins**

Motion: Jonathan Bonesteel Second: Jay Patel Vote: 6/0

NOTICE: The School District accommodates individuals with disabilities. Forty-eight hour advance notice is required to meet special needs for public meetings. Upon written request, materials in alternate formats will be provided for individuals with disabilities. Please contact the Bond Program Manager, 306-4500 ext. 4461.