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## DISTRICT FACILITIES PROGRAM A PERSPECTIVE

While the scope of the annual performance audit and midyear reports are limited to Measures M, F "cp f 'L.'k/ku'wughn'vq "tgx lgy "vj g"j kuq t{ "qh'vj g'F kvtkeu'hcekklgu"r tq i tco "vq "rncg"vj g"ewttgpv" program into context.

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## EXECUTIVE SUMMARY

This midyear report, prepared between February 2006 and April 2006, includes a review of the  
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District and Professional Services Staffing Plan for the Bond Program

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## COMPLIANCE WITH BALLOT LANGUAGE

### **MEASURE M**

On July 24, 2000, the Board of Education of the West Contra Costa Unified School District approved the placement of a \$150 million bond measure (Measure M) on the ballot with the adoption of Resolution No. 33-0001.

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oversight committee to monitor that funds are spent accordingly?

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## **MEASURE J**

On July 13, 2005, the Board of Education of the West Contra Costa Unified School District approved the placement of a \$400 million bond measure (Measure J) on the ballot with the adoption of Resolution No. 25-0506. Measure J, a Proposition 39 bond measure requiring a 55 percent affirmative vote, passed with 56.85 percent of the vote on November 8, 2005.

As a Proposition 39 bond measure, Measure J is subject to the requirements of California State Education Code § 52026.6. Measure J requires that the West Contra Costa Unified School District obtain an annual independent per capita audit to ensure that the funds are used for the intended purposes.

The complete ballot language contained in Measure J is attached hereto as Appendix C. The following appeared as the summary ballot explanation:

To continue repairing all school facilities, improve classroom safety and technology, and relieve overcrowding shall the West Contra Costa Unified School District issue \$400 million of bonds. A committee shall be appointed to monitor that funds are spent accordingly, and upon receipt of a waiver of the State Auditor's report shall be submitted to the Board of Education.

The Measure J ballot language focused on the continued repair, modernization and reconstruction of district school facilities in the following broad categories:

### I. All School Sites

- Security and Health/Safety Improvements
- Major Facilities Improvements
- Special Education Facilities
- Property
- Sitework

### II. Elementary School Projects

- Complete Remaining Elementary School Projects
- Complete Remaining Secondary School Projects
- Reconstruction Projects
  - a. Health and Life Safety Improvements
  - b. Systems Upgrades
  - c. Technology Improvements
  - d. Instructional Technology Improvements
- Specific Sites Listed for Reconstruction or New Construction
  - De Anza High School
  - Kennedy High School
  - Pinole Valley High School
  - Richmond High School
  - Castro Elementary School
  - Coronado Elementary School



- Dover Elementary School
- Fairmont Elementary School
- Ford Elementary School
- Grant Elementary School
- Highland Elementary School
- King Elementary School
- Lake Elementary School
- Nystrom Elementary School
- Ohlone Elementary School
- Valley View Elementary School
- Wilson Elementary School

As required by Proposition 39, the West Contra Costa Unified School District certified the results of the November 8, 2005 bond election in which Measure J was passed at the school board meeting of January 24, 2006. At the January 24, 2006 meeting, the school board certified the results of the November 8, 2005 bond election. [Redacted] (b)(4)(r)3.0(d)-504Q

## FACILITIES PROGRAM HISTORY/STATUS

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DATE	ACTION	AMOUNT
August 17, 2005	Establish a Payroll Committee (Appointment of Tony Thurman, representing the City of Richmond and Andres Soto, representing Supervisor John Gioia).	
September 7, 2005	Ratification and approval of August 2005 negotiated change orders for Measure M-1A, M-2A and D-1A projects.	\$1,267,473
September 7, 2005	Approve increase in contract with Alan Kropp and Associates for additional geotechnical engineering services for Measure D projects.	\$112,595
September 7, 2005	Award contract of Kin Woo Construction for portable disconnects at Harding and Sheldon (Measure M, 2 bids).	\$74,820
September 7, 2005	Award contract to Kin Woo Construction for portable disconnects at seven (7) schools (Measure M, 1 bid).	\$499,380
September 7, 2005	Award contract to Ghilloti Bros. for Montalvin sitework project (Measure M, 2 bids).	\$332,173
September 7, 2005	Award contracts to various moving companies for furniture and equipment moving services at five (5) schools (Measure M, 4 bids).	\$63,344
September 7, 2005	Discuss purchase of property on Sycamore Drive in the City of Hercules for a proposed new middle school.	\$4,300,000
September 7, 2005	Establish a Payroll Committee (Appointment of Karen Pfeiffer, representing the City of Richmond and Karen Pfeiffer, representing Board Member Karen Pfeiffer).	
September 28, 2005	Establish a Payroll Committee (Appointment of Karen Pfeiffer, representing the City of Richmond and Karen Pfeiffer, representing Board Member Karen Pfeiffer).	

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DATE	ACTION	AMOUNT
October 5, 2005	Award contract to William Scottsman for Vista Hills portables project (Measure M, 2 bids).	\$986,346
October 19, 2005	C y ctf 'eqpvcev\q'Go rñ{gtàu'C fxqecv'hq t'R tq lgevNcdqt'C i tgggo gpv' (PLA) consulting services (Measures M and D).	\$60,00
October 19, 2005		

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**DATE**

**ACTION**

**AMOUNT**



The Board of Education approved the Facilities Master Plan on October 18, 2000, prior to any Board action or direction on construction quality standards, grade-level configuration, school/site sizes (minimum and maximum), potential school closures/consolidation, replacement vs. modernization threshold, the impact of project labor agreements, local bidding climate, and so forth. The Facilities Master Plan provides useful information on the age and conditions of existing schools, inventory of sites and facilities, the need for new schools, replacement needs of some schools and modernization/renovation needs. The plan identified the need of approximately \$500 million for new construction and modernization. More recent cost estimates for phases M-1A, M-1B and D-1A (September 13, 2004, August 24, 2005 and January 24, 2006) are presented, respectively, in tables 1, 2 and 3 in this section.

A summary of tables 1, 2 and 3 and associated costs is presented below.

Table	Phase	Capital Projects Cost Estimates (September 13, 2004)	Capital Projects Cost Estimates (August 24, 2005)	Capital Projects Cost Estimates (January 24, 2006)
1	M-1A	\$113,204,174	\$120,652,985	\$123,530,146
2	M-1B	127,810,707	132,099,013	135,149,251
	Other Elementary <sup>1</sup>		36,196,918	39,112,634
	Subtotal		288,948,916	297,792,031
3	D-1A	220,858,164	224,245,702	224,598,769
	Other Secondary <sup>2</sup>		36,680,386	29,755,828
	Subtotal		260,926,088	254,354,597
	Totals	\$461,873,045	\$549,875,004	\$552,146,628

<sup>1</sup> Quick start projects, M-2A and M-3 projects, e-rate projects, furniture and equipment, program coordination, miscellaneous portables and renovation.

<sup>2</sup> D-2A and D-3 projects, e-

To provide direction to the WLC/SGI team and future project architects, the Board considered various construction quality standards to apply to Measure M projects. At its meeting of May 15, 2002, the Board was presented with a number of options ranging from \$181 million, the estimated total revenues for Measure M including interest, to \$465 million. These options appear in the table below.

Many variables have impacted construction costs, including but not limited to the following:

- Establishment of Option 1C quality standards
- Inadequate state modernization and new construction funding
- Project labor agreements
- Acceleration of construction costs at a rate higher than projected
- Passage of Proposition 39 and the 55 percent threshold for local bonds and resulting construction
- Passage of Proposition 1A (November 1998), \$9.2 billion bonds and resulting construction
- Passage of Proposition 47 (November 2002), \$13.05 billion bonds and resulting construction
- Passage of Proposition 55 (March 2004), \$10.0 billion bonds and resulting construction
- Labor compliance law requirements
- International procurement of the construction materials

All Phase M-1A projects have been completed, or have been substantially completed, with construction completion dates ranging from September 29, 2004, to December 30, 2005.

The District submitted eight (8) Phase M-1B projects to the Division of State Architect (DSA)

Of the 32 prequalified bidders, the average number of bids ranged between 3.2 and 3.4 bids per project.

Overall, the prequalification process was as follows:

<b>Processes</b>	<b>Number of Firms</b>
Prequalification	32
Firms Submitting Bids	12

**Table 1. Measure M-1A Projects. Total Estimated Costs (Construction and Soft Costs).**

<b>School</b>	<b>Year Built</b>	<b>Capital Projects<sup>1</sup> Cost Estimates</b>	<b>Capital Projects<sup>2</sup> Cost Estimates</b>	<b>Capital Projects<sup>3</sup> Cost Estimates</b>
Harding Elementary	1943	\$14,014,301	\$15,051,673	\$15,376,715
Hercules/Lupine Hills Elementary	1966	13,615,961	13,796,472	13,802,888
Lincoln Elementary	1948	15,200,388	16,352,285	16,416,350
Madera Elementary	1955	9,954,252	10,546,467	11,002,750
Montalvin Elementary	1965	10,420,290	11,207,830	12,055,924
Peres Elementary	1948	16,889,728	17,747,978	18,158,395
Riverside Elementary	1940	11,788,329	12,370,886	12,685,800
Stewart Elementary	1963	8,945,696	10,160,984	10,403,986
Verde Elementary	1950	12,375,228	13,418,406	13,627,334
<b>Total</b>		\$113,204,174	\$120,652,985	\$123,530,146

<sup>1</sup> Budgets from Capital Assets Management Plan/Reconciliation Report, September 13, 2004.

<sup>2</sup> Budgets from Capital Assets Management Plan/Reconciliation Report, August 24, 2005.

<sup>3</sup> Budgets from Capital Assets Management Plan/Reconciliation Report, January 24, 2006.

**Table 2. Measure M-1B Projects Projects**

**Table 3. Measure D-1A Projects. Total Estimated Costs. (Construction and Soft Costs).**

<b>School</b>	<b>Year Built</b>	<b>Capital Projects Cost Estimates<sup>1</sup></b>	<b>Capital Projects Cost Estimates<sup>2</sup></b>	<b>Capital Projects Cost Estimates<sup>4</sup></b>
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**Table 4. Measure M-1A. Budget, Contracts and Schedule.**

<b>School</b>	<b>Harding</b>	<b>Hercules/ Lupine Hills</b>	<b>Lincoln</b>	<b>Madera</b>	<b>Montalvin</b>	<b>Peres</b>	<b>Riverside</b>	<b>Stewart</b>	<b>Verde</b>	<b>Totalrt</b>
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**Table 5. Measure M-1B. Budget, Contracts and Schedule.**

<b>School</b>	<b>Bayview</b>	<b>Ellerhorst</b>	<b>Kensington</b>	<b>Mira Vista</b>	<b>Murphy</b>	<b>Sheldon</b>	<b>Tara Hills</b>	<b>Washington</b>	<b>Total Phase M-1B</b>
Budget (January 24, 2006)									



**Table 6. Measure D-1A. Budget, Contracts and Schedule.**

School	Downer Elementary (Abatement /Demolition)	El Cerrito High School (Temp Housing)	El Cerrito High School (Abatement/ Demolition)	Pinole Middle School (Temp Housing)	Portola Middle School <sup>2</sup>	De Anza High School <sup>2</sup>	Helms Middle School <sup>2</sup>	Total Phase D-1A
Budget (January 24, 2006)								
Construction Costs	\$18,106,195	Included	\$74,232,858	\$28,469,182	\$26,680,522	\$ -0-	\$39,577,565	\$187,066,322
Soft Costs	5,838,301	in total	20,860,185	9,298,956	9,001,517	3,409,427	13,068,557	61,476,945 (24.7%)
Total Budget	\$23,944,496	budget	\$95,093,043	\$37,768,138	\$35,682,039	\$3,409,427	\$52,646,121	\$248,543,265
SAB #								
SAB Revenues <sup>1</sup>								
Bid Schedule	9/28/05 (Demolition)	2/3/05 (Site) March 2006 (Port)	Oct. 2005 (Site) Feb. 2006 (Bldgs)	6/15/05 And Sept. 2005 (Bldgs)			Nov. 2005 (Site) June 2006 (Bldgs)	
				nc. HJ Integrated System, Inc.				

## MEASURE D AND MEASURE M EXPENDITURE REPORTS

### MEASURE D

To ensure a comprehensive performance audit, Total School Solutions (TSS) reviewed all Measure D projects, and selected several for more extensive examination. As of December 31, 2005, forty-one (41%) of total Measure D bond funds authorized have been spent.

#### **Measure D Bond Issuance and Expenditures as of December 31, 2005.**

Total bond authorization	\$300,000,000
Total bond issues as of December 31, 2005 (Series A, B, C and D)	\$300,000,000
Expenditures through December 31, 2005	\$122,234,819 (41% of total authorization)

#### **Measure D Expenditures Report (June 30, 2005).**

<b>Audit Projects</b>	<b>2001-02</b>	<b>2002-03</b>	<b>2003-04</b>	<b>2004-05</b>	<b>Total</b>
Bayview Elementary (M-1B)		\$	\$	\$8,247,067	\$8,247,067
Downer Elementary (M-1B)				553,216	553,216
Ellerhorst Elementary (M-1B)			301,424	5,853,517	6,154,941
Harding Elementary (M-1A)				68,487	68,487
Kensington Elementary (M-1B)					

<b>Audit Projects</b>	<b>2001-02</b>	<b>2002-03</b>	<b>2003-04</b>	<b>2004-05</b>	<b>Total</b>
Hercules Middle (D-1B)	60	620,973	3,001		624,033
Pinole Middle (D-1A)		353,758	916,981	2,440,588	3,711,327
Portola Middle (D-1A)	420	410,690	873,353	1,660,003	2,944,966
DeAnza High (D-1A)		686,260	2,178,362	16,920	2,881,542
El Cerrito High (D-1A)		656,699	2,317,678	9,150,276	12,124,653
Gompers High (D-1B)		402,142	54,369	138,915	595,426
Kennedy High (D-1B)		699,246	116,657	238,747	1,054,650
Pinole Valley High (D-2)		563,775	57,621		621,396
Richmond High (D-1B)		658,083	70,636	129,950	859,469
Vista High (D-2)		147,675	(55,306)		92,369
North Campus High (D-2)		166,421	19,323	6,673	192,418
Hercules High (D-1B)		2,495,001	216,960	(135,975)	2,593,277
Delta High (D-1B)		158,199	(25,268)		132,932
Kappa High (D-1B)		155,447	(53,799)		101,648
Omega High (D-1B)		157,030	(53,242)		103,788
Sigma High (D-2)		155,809	(53,222)		102,586
Deferred Maintenance Transfer	1,277,500				1,277,500
Overall Facilities Program	262,142	1,056,914	1,618,088	2,722,856	5,660,000
<b>Totals</b>	<b>\$1,557,412</b>	<b>\$12,599,491</b>	<b>\$9,993,366</b>	<b>\$72,895,361</b>	<b>\$97,045,630</b>
<b>Percent of Total Authorized</b>	<b>1%</b>	<b>4%</b>	<b>3%</b>	<b>24%</b>	<b>32%</b>

<sup>1</sup>Measure D funds were borrowed to complete the new Lovonya DeJean School during 2002-03 and 2003-04 and were repaid in 2004-05 when the project received state funds.

## MEASURE M

To ensure a comprehensive performance audit, TSS reviewed all Measure M projects and selected several for more extensive examination. As of December 31, 2005, one hundred nine (109%) of total Measure M bond funds authorized have been spent. (Note: The percentage exceeds one hundred (100%) of the bond proceeds because of interest earnings and refinancing





**MEASURE J PRELIMINARY BUDGET**

The District established the following preliminary budget and schedule for the projects to be financed out of the \$400 million Measure J. The phasing plan was approved by the Board on November 16, 2005:

**Anticipated revenues for Measure J projects**

<b>Source</b>	<b>Anticipated Revenue</b>	<b>Reference</b>
Measure J bonds	\$400,000,000	Four sales over 8 years, beginning in 2006
Developer fee income	10,500,000	Growth over 8 years
Interest income	14,000,000	Over 8 years
Joint use funds	3,000,000	City/District projects
State funds	44,456,774	

**Measure J: Secondary School Reconstruction Schedule**

<b>School</b>	<b>Proposed Budget</b>	<b>Scheduled Design Phase Start</b>	<b>Scheduled Construction Start</b>	<b>Scheduled Completion</b>
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## **STATE NEW CONSTRUCTION ELIGIBILITY**

As reported in the performance audit report for the period ending June 30, 2004, new construction eligibility was originally established in the Hercules and Pinole Valley High School attendance areas based on CBEDS enrollment data through the 2002-03 school year (SAB 50-01, 50-02 and 50-03). Eligibility forms SAB 50-01, 50-02 and 50-03 were subsequently updated based on CBEDS enrollment data through 2003-04, indicating that eligibility no longer exists within the Pinole Valley High School attendance area and that eligibility declined in the Hercules High School attendance area.



Environmental proposals are due September 21<sup>st</sup> and will be evaluated by staff prior to preparation of a recommendation to the Board.

In follow-up to the meeting on October 5, 2005, reported the following:

The District and District to reach agreement on sale of the proposed school site property. The District will not be eligible to receive the previously awarded 2005 Brownfields Cleanup Grant for the site. EPA staff have indicated that it will be possible to reapply for the current funding cycle when the District can meet the ownership criteria. Staff will review next steps with the City of Hercules, focusing on a consideration of completing Supplemental Site Investigations to more accurately characterize the required environmental impacts.

### **Midyear Report Update**

On November 16, 2005, the District approved the purchase of the above identified Wastewater Treatment Plant property contingent upon a Supplemental Site Investigation regarding clean-up issues. Once the extent of the required clean-up and costs are established, a final agreement can either be entered into or cancelled.



**State Allocation Board Modernization Funding for Measure M-1A Projects.**

<b>SAB # 57/</b>	<b>School</b>	<b>SAB Fund Release Date</b>	<b>SAB Grant Amount<sup>1</sup></b>	<b>District Match Requirement</b>
10	Verde Elementary	9/02/03	\$1,161,510	\$774,340
		5/09/05	18,584	12,390
11	Peres Elementary	9/25/03	1,448,206	1,086,084
		5/09/05	20,273	13,515
12	Stewart Elementary	0(5)JTJ	ET	Q
			q	BT

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**State Allocation Board Rehabilitation Funding**

<b>SAB # 58/</b>	<b>School</b>	<b>SAB Fund Release Date</b>	<b>SAB Grant Amount</b>	<b>District Match Requirement</b>
01	Lincoln Elementary		\$654,579 (100%)	\$ 0 (0%)
<b>Grand Total</b>			<b>\$26,743,937</b>	<b>\$17,731,976</b>

**Existing Campuses. Elementary Schools. Updated December 31, 2005**

No.	Existing Campus	Grade	Bond (Phase)	SAB# <sup>1</sup>	SAB Eligibility Approval (50-03)	Eligibility Enrollment	SAB Project Approval (50-04)	SAB Fund Release (50-05) <sup>2</sup>	SAB Grant Amount (%) <sup>3</sup>
104	Bayview (1952)	K-6	M(1B)	024	07/26/00	585	09/22/04	10/18/04 05/09/05	\$2,513,112 (60%) 21,962
108	Cameron (Spec. Ed)	K-6							
109	Castro (1950) <sup>4</sup>	K-6	M(2A)	000					

No.	Existing Campus	Grade	Bond (Phase)	SAB# <sup>1</sup>	SAB Eligibility Approval (50-03)	Eligibility Enrollment	SAB Project Approval (50-04)	SAB Fund Release (50-05) <sup>2</sup>	SAB Grant Amount (%) <sup>3</sup>
135	Lincoln (1948) (1994)	K-5	M(1A)	015 015		58% m			



**Existing Campuses. Alternative Schools. Updated December 31, 2005.**

No.	Existing Campus	Grade	Bond (Phase)	SAB# <sup>1</sup>	SAB Eligibility Approval (50-03)	Eligibility Enrollment	SAB Project Approval (50-04)	SAB Fund Release (50-05) <sup>2</sup>	SAB Grant Amount (%)
358	Gompers (1934)	9-12	D(1B)	000	7/26/00	165			
369	Middle College	9-12							
373	Vista High	K-12	D(2)						
374	North Campus	9-12	D(2)	000	3/22/00	123			
408	Adult Education-Serra								
102	Adult Education-Alvarado								
<b>Total 6 Alternative Schools</b>									



**DISTRICT AND PROFESSIONAL SERVICES STAFFING PLAN**  
**FOR THE BOND PROGRAM**

The governance and management of the bond management plan have evolved over time to address the changing needs, functions and funding of District facilities. This section provides an update on the changes in administering the full facilities program since July 1, 2003. (For a detailed history of the

## **BIFURCATION OF THE MASTER ARCHITECT AGREEMENT**

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**Category**

**FTE<sup>1</sup>**

The table below provides a detailed project cost breakdown for Phases M-1A, M-1B and D-1A.

**Capital Assets Management Plan/Reconciliation Report. August 24, 2005.**

<b>Budget Category</b>	<b>M-1A Budget</b>	<b>M-1B Budget<sup>1</sup></b>	<b>D-1A Budget</b>
Pre-Design Services	\$263,344	\$357,567	\$581,241
Design Phase Services <sup>2</sup>			
Bond Program Manager	\$6,043,711 (5.0%)	\$6,565,238 (5.0%)	\$15,200,365 (6.8%)
Master Architect	4,583,450 (3.8%)	4,671,178 (3.5%)	10,380,788 (4.6%)
Construction Manager	0	1,069,430 (0.8%)	0
Design Manager	0	0	2,410,699 (1.1%)
A/E of Record	7,717,173 (6.4%)	9,344,250 (7.1%)	17,281,336 (7.7%)
Specialty Consultants	821,470 (0.7%)	851,827 (0.6%)	898,953 (0.4%)
Other <sup>3</sup>	2,525,217 (2.1%)	2,674,127 (2.0%)	2,551,903 (1.1%)
Total	\$21,691,021 (18.0%)	\$25,176,049 (19.1%)	\$48,724,044 (21.7%)
Construction Phase Services	\$3,953,420	\$3,936,502	\$6,151,943
<b>Soft Costs Total</b>	<b>\$25,907,784</b> <b>(21.5%)</b>	<b>\$29,470,115</b> <b>(22.3%)</b>	<b>\$55,457,229</b> <b>(24.7%)</b>
Construction Costs			
Modernization/New <sup>4</sup>	\$ 87,869,511	\$ 93,047,227	\$160,357,799
Temporary Housing	6,875,686	9,581,664	8,430,675
<b>Construction Costs Total</b>	<b>\$ 94,745,197</b>	<b>\$102,628,891</b>	<b>\$168,788,474</b>
<b>Total Project Budget</b>	<b>\$120,652,985</b>	<b>\$132,099,013</b>	<b>\$224,245,703</b>

<sup>1</sup> Includes Downer Elementary School.

<sup>2</sup> Percentages based on total project budget.

<sup>3</sup> Includes DSA fees, CDE fees, reproduction costs, General Conditions and Hazardous Materials and Monitoring, etc.

<sup>4</sup> Includes escalation costs.





expected for this spectrum of services. However, the San Francisco Bay Area has a higher standard subjectively estimated at about 8%-10%. As noted above, the WCCUSD provides an even higher scope of service to ensure a quality product.

The existing WCCUSD facilities management structure was developed when virtually no support structure existed. The District administrative staff members designated to the program at that time were new to the District. Also, except for the construction of Hercules Middle/High School, there had been no major active District facilities program for a number of years. Furthermore, the District adopted construction schedules which were aggressive and, consequently, more costly. Therefore, in our opinion, the costs do not appear to be unreasonable.

<sup>1</sup>Based on the total Measure M and D budgets, including the \$450 million bonds plus interest earnings, refinancing, state match funds, developer fees, etc.

**BOND FINANCE OFFICE**

TSS performed an analysis of the duties associated with personnel paid from the bond funds. Currently, the bond program funds three (3) fiscal services positions, at the level of 50 percent to 100 percent, as follows:

- Director of Fiscal Services óCapital Projects (funded at 50 percent from bond funds);
- Senior Director of Bond Finance (funded at 75 percent from bond funds);
- Principal Accountant óBond Fund (funded at 100 percent from bond funds)

Rtqt" rgtq to cpeg" cwfk' tgrqtu" kfgvkgf" flkewkgu" y kj" vjg" dqp f" r tqi tco au" hucn" curgeu." particularly with respect to vendor payment delays, accounting reconciliation between the District and SGI systems, and duplication of work due

The introduction of Measure J brings a significant infusion of capital and the consequent ability to construct more needed projects. However, the District is no longer in need of many of the one-time services that were necessary four (4) years ago. Much of the work already done will serve Measure J well. The original contracts and staffing plans were developed without the current level of District staff. Furthermore, as early as June 2003, as it was pointed out in the first audit report, there were overlap of duties between the Master Architect and the Architects of Record (AORs). It therefore may be reasonable and timely to consider redefining the Master Architect role while expanding the role of the AORs to a more traditional scope of services. This newly defined Master Architect role could be of assistance with overall budget development and oversight of the AORs. In any event, a reduction of cost for Master Architect services should be expected due to the fact that much of the work done for Measures M and D was one-time work. (Refer to the Midyear Report Update in the section titled Master Architect/Engineer Plan for detail.)

The scope of future services to be provided by the Program Manager, SGI, should also be re-considered. Similar to the Master Architect, some of the originally contracted services were included due to the lack of designated district



The foregoing comparison should be viewed as an example of how services might be provided with in-house staffing. Exact classifications applied to specific functions would be based on an analysis of duties as compared to current job description content. Although there may be a tendency for the in-house cost to escalate somewhat, there would probably be financial savings of more than \$2,500,000 over the approximate four years used in the calculation. Fiscal functions, in particular purchasing, budgeting, and payables, would all be under direct district supervision, a matter discussed in all previous performance audits.

It could be agreed that the savings in the table above are overstated, as it may cost more due to higher compatible employees than what is projected, based on the current salary schedule. Furthermore, should the District choose to implement an in-house staffing plan, it should include an additional time allocation to provide appropriate supervision to those positions brought in-house. Further, it is assumed that the secretarial position previously approved by the Board for the Engineering Officer will be filled.



In the 2004 annual performance audit report, it was noted that the District and bond management team had undertaken a thorough review of the master architect contract and initiated a process to bifurcate the contract into two separate contracts.

The 2005 annual performance audit noted that the bifurcation of the contract has been accomplished.

The reorganization appears to have settled and become functional. The role of WLC as master architect is now significantly clearer. In particular, the roles of the Architects of Record for the various projects (providing CM services for certain projects and coordination of other construction management providers) for all projects is better defined. Total School Solutions believes that the District is served

## **STANDARD CONSTRUCTION DOCUMENTS**

### **Process Utilized**

The bond management team provided the review team with copies of the Master Architect/ Engineer Plan, Quality Control Program, and a sample of the construction documents utilized in the projects. TSS conducted interviews with District staff and members of the bond management team. These interviews covered a number of topics, including the process utilized in the development of standard construction documents.

### **Background**

The review process takes into account the fact that each campus is unique and, as a consequence, has different requirements. The review of standard construction documents is intended to determine whether the process utilized in their development will produce the desired consistency in product quality, educational features and overall aesthetics for campuses when they are completed as described by the Master Architect Approach to Standards.

The 2003 annual performance audit found that the District issued a significant number of addenda in the initial projects for which bids had already been invited. Those bids were high as a result of not having all the standard construction documents available at the time the District bid those projects.

The 2004 annual performance audit commended the District for the development of improved standard documents. At that time, it was anticipated that the new documents would significantly improve the bidding process for the District.



## **DESIGN AND CONSTRUCTION COST BUDGETS**

### **Process Utilized**

Construction of the Phase M-1A and M-1B projects was nearly completed and/or substantially completed during the time period covered in this report. The bond management team provided Total

## **Midyear Report Update**

As noted above and in the pre egf kpi "öF gukip"cpf"Eqputwekqp"Uejgfwnguö"ugekqp."fgvckgf"fcv"lqt" Measure M and D projects are presented in earlier sections of this report.

For budget and discussion of the recently (November 8, 2005) passed Measure J, refer to the section, öO gcuwtg'LR tgnlo kpt{ Dwf i gvö0

## **DISTRICT POLICIES AND GUIDELINES FOR FACILITIES PROGRAM**

### **Process Utilized**

In the performance of this midyear review, Total School Solutions (TSS) interviewed District staff; reviewed available documentation and manuals for content, language, relevance and completeness; and tried to form a comparison with the policies and procedures documentation maintained at other similar school districts. The recent changes in law as well as policies and procedures in place were also taken into consideration.

### **Background**

As in previous performance audits, for the fiscal year 2004-05, Total School Solutions recommended that District administration and staff members continue to work toward updating policies and regulations related to the facilities program. Many policies and regulations remain out of date with respect to current



## BIDDING AND PROCUREMENT PROCEDURES

### Process Utilized

In the process of this examination, numerous purchasing documents were reviewed. The payment documentation pertaining to new construction and modernization projects was examined and analyzed. Additionally, various staff members were interviewed.

### Background

As noted in the 2004-05 annual performance audit report, no major construction bids were conducted during the 2004-05 period. Several construction projects were initiated to take advantage of the summer schedule. A review was made of the procurement practices and smaller bids were conducted within this reporting period.

The several furniture purchases for schools undergoing modernization were discussed. It was noted that Purchasing was able to take advantage of the CMAS Contract, a schedule of negotiated bids performed by the California Department of General Services and U.S. Communities.

### Midyear Report Update

For this midyear report, TSS reviewed the bids and analyzed them for completeness and compliance. Bids reviewed ranged in types from purchase of fitness equipment for El Cerrito High School to the resurfacing of Pinole Valley High School Field. Additionally reviewed were several sitework bids solicited during the period of July 2005 to December 2005. The sitework bids were introduced to achieve equity among schools and were not a part of the original modernization project.

TSS also revisited the procurement practices for the bidding process. Lessons learned from Measure M have served well as guidelines for Measure D projects. Staff has hired RGA Environmental and Interactive Resources to investigate potential problem areas before they occur in the renovation projects. There is a higher awareness that investigation of soil for seismic factors and toxicity is essential in avoiding major time and money problems in a construction project. The proper handling of bids represented savings of nearly one million dollars for the El Cerrito High School project. Continued pre-qualification of contractors shortens bidding time. This system has been in place since the start of Measure M and has been carried out smoothly during the current bidding processes.

It was discovered that two bidders were disqualified from the Shannon Elementary School Modular Sitework and Electrical Project because they failed to attend the mandatory bid meeting. While staff is to be commended for their diligence in catching the discrepancy and avoiding bid protests, which could have potentially delayed the award of the project, new procedures should be implemented to prevent recurring disqualifications. Bidders pick up plans from the printer and do not necessarily attend the mandatory pre-bid meeting, missing out on important information that may have been discussed during said meeting. Therefore, the new procedures should provide for assistance to the bidders including informing them of the importance of attending events such as the pre-bid meeting.

The District expanded the New Campus Theater at El Cerrito High School as a separate bid. These plans were revised, at the request of the community to increase the seating capacity from 360 to 600. Seven million dollars was added to the project budget. The piece meal method of bidding adds overhead cost to the project. For cost effectiveness, it is important to plan the entire scope of work at the outset. The economies of scale can be achieved if bids were to be conducted at one time.

The Pinole Valley High School Track was bid and awarded even though it was \$400,000 over the  
F k u t e v u " q t k i k p c n ' d w f i g v ' f w g " \ q " c " f k h e w n ' d k f f k p i " e r k o c v g O V k o k p i " q h " \_ 1

**CHANGE ORDER AND CLAIM AVOIDANCE PROCEDURES**

**Process Utilized**

In the process of this examination, relevant documents were analyzed. TSS also conducted interviews with the Facilities and Construction Management Team.

**Background**

Change orders happen for a variety of reasons. The most common reason is the discrepancy between the condition of the job site and the drawings. Because small repairs may have been made at various times, the incompatibility is discovered during construction. Other times, problematic site conditions are not discovered until, for example, a portion of a wall or floor is revealed. The presence of hazardous materials also adds to change orders. Geotechnical reasons such as liquefaction, landslides and earthquake faults contribute to change orders if not sufficiently investigated prior to bid.

Construction change orders can be pre-negotiated with the architect for cost recovery. This type of change order can be pre-negotiated with the architect for cost recovery.

The control of change order is a significant issue due to its direct impact on the budget. A sampling of change orders from Measure M and D is given below:

***Measure M Phase 1A:***

<b>Project</b>	<b>Construction Contract</b>	<b>Approved Change Orders</b>	<b>Potential Change Orders</b>	<b>Total Change Orders</b>	<b>Change Order %</b>
Harding Elementary	8,917,000.00	1,745,919.00	645,432.00	2,391,351.00	26.82%
Lupine Elementary	10,272,500.00	451,496.00	0.00	451,496.00	4.40%
Lincoln Elementary	9,375,000.00	2,399,196.00	0.00	2,399,196.00	25.59%
Madera Elementary	6,592,300.00	962,152.00	220,000.00	1,182,152.00	17.93%
Montalvin Elementary	6,823,000.00	1,348,859.00	37,642.00	1,386,501.00	20.32%
Peres Elementary	10,949,000.00	2,295,010.00	265,200.00	2,560,210.00	23.38%
Riverside Elementary	7,772,000.00	1,025,215.00	100,000.00	1,125,215.00	14.48%
Stewart Elementary	6,226,000.00	1,695,568.00	(5,781.00)	1,689,787.00	27.14%
Verde Elementary	8,687,000.00	1,318,862.00	405,905.00	1,724,767.00	19.85%

**Measure M Phase 1B:**

<b>Project</b>	<b>Construction Contract</b>	<b>Approved Change Orders</b>	<b>Potential Change Orders</b>	<b>Total Change Orders</b>	<b>Change Order %</b>
Bayview Elementary	10,413,000.00	529,835.00	100,000.00	629,835.00	6.05%
Ellerhorst Elementary	7,712,500.00	269,967.00	153,397.00	423,364.00	5.49%
Kensington Elementary	11,077,762.00	1,218,362.00	71,330.00	1,289,692.00	11.64%
Mira Vista Elementary	7,711,830.00	1,043,679.00	391,218.00	1,434,897.00	18.61%
Murphy Elementary	7,650,000.00	672,843.00	488,200.00	1,161,043.00	15.18%
Sheldon Elementary	8,561,650.00	537,850.00	1,159.00	539,009.00	6.30%
Tara Hills Elementary	7,243,895.00	335,866.00	150,376.00	486,242.00	6.71%
Washington Elementary	8,809,000.00	1,344,327.00	388,414.00	1,732,741.00	19.67%

**Measure D:**

<b>Project</b>	<b>Construction Contract</b>	<b>Approved Change Orders</b>	<b>Potential Change Orders</b>	<b>Total Change Orders</b>	<b>Change Order %</b>
El Cerrito Temp Housing	3,444,000.00	354,297.00	0.00	354,297.00	10.29%
El Cerrito Demolition	2,078,125.00	(125,962.00)	15,000.00	(110,962.00)	-5.34%
Pinole MS Temp Housing	529,000.00	60,000.00	0.00	60,000.00	11.34%

**Midyear Update**

The change order approval process continues to be organized and orderly. A Request for Information (RFI) is initiated by the contractor and answered by the architect or engineer. Once an appropriate action is identified and selected, the contractor is requested to submit a price

The staff assignment appears to be well balanced and fair as Measure D comes on board. Experienced staff can negotiate fair change orders and understand the effect of such change orders on the overall scheduling of work, thereby minimizing contractor claims. The concern as adequate monitoring is necessary to avoid claims and mistakes at the jobsite.

affected work, thereby requiring additional compensation. The RFI sampled showed the response time to be the longest for questions regarding door schedules, electrical vault location, and low voltage. The RFI may or may not result in a change order. The consultants should continue to improve on the response timeline for RFIs from contractors.

For seventy percent (70%) of the twenty projects sampled, the change order percentage was over ten percent (10%). It has been found that the total change order amounts have surpassed the construction contingency amount for the Measure M 1A and 1B projects by \$4,514,185. Although TSS noted significant improvements on projects sampled for Measure M 1B, there is still room for improvement.

Change orders are typically reserved for unforeseen conditions or conflicting information in drawings, and not for additional scope of work. The danger of using change orders to add scope of work can mean inadequate funding for later projects. Actual cases have shown contractors holding the District liable for doubling scope of work through change orders. The decision hierarchy should be reviewed so that new scope of work is not unnecessarily added which results in deficit spending of construction budgets.

It was noted that although most of the projects were substantially completed and occupied by the students, the projects have not been totally closed out. The closeout process has taken four months or more on average. If a site is put to use before a project is closed out, the work is difficult to complete as contractors can claim that occupancy might have caused some of the damages that need repair. Also, the contractors are harder to call back because most of the sub-contractors who do the individual trade work have moved on to other projects. The extended timeline for closeout also creates difficulty for staff because, in keeping with the schedule, they are already assigned to new projects while still balancing time to closeout the old ones. The staff should review the closeout process and develop or modify a procedure to shorten the timeline between substantial occupancy and acceptance of work for the Notice of Completion.

The punchwalk process, which allows for the inspection and certification that all aspects of the job are complete, is a critical process. It is recommended that the members of the group responsible for the closeout process include the inspector and the specific consultant engineer. The addition of the School R the specific use of the completed project or facility. A more thorough project closeout checklist can be created with the involvement of all concerned parties. This will circumvent the need for the contractor to return multiple times, for creating avoidable change orders, and for extending the closeout time.





## **BEST PRACTICES IN PROCUREMENT**

### **Process Utilized**

The District staff was interviewed; documentation was reviewed; and processes were observed in the course of work. To clarify issues or questions, subsequent interviews were held.

### **Background**

The best practices in procurement of materials and services ensure the most efficient use of resources. Efficiency can be gained by enforcement of contract language, management of consultants, and the understanding of cause and effect of market economy. It was the intent of this component of the examination to determine that best practices are promoted.

Board policy delegates authority to the purchasing department to engage in contracts to not only ensure that the best-quality products at the most economical prices are obtained, but to enforce the contract and all its rights afforded the District. Board policy sets fiscal controls to ensure monies disbursed are within budgeted appropriations set by the Board. Invoices in excess of the approved purchase order amounts are to be reviewed and approved through appropriate actions.

### **Midyear Update**

During the time since previous update and audit reports were completed, the procurement practices have improved significantly. Staff has done a good job in creating comprehensive operating procedures for handling requisitions, bids, purchase orders and invoices. Procedures are well articulated, concise, and clear. The process includes the name of the responsible party for each step, thus establishing accountability and responsibility so that each task is performed timely and efficiently.

The staff is also taking advantage of cost saving opportunities whenever possible. They utilized a short lease for the purchase of theater seating for Harding Elementary School Auditorium. The legal counsel confirmed the validity of the contract and negotiated a short lease, thus presenting some savings on money and time.

The district staff is commended for doing an analysis on function and need as it relates to construction projects. For example, by changing the grade and decreasing the thickness of temporary asphalt paving at El Cerrito High School, savings of \$100,000 were realized without compromising the functionality of the temporary asphalt pad.

TSS also commends the staff for creating an apprenticeship training program which creates opportunity for talented community members who may otherwise have a difficult time gaining access to such programs. The apprenticeship program eventually builds on the pool of qualified future contractors that can give back to the District. Increasing the pool of qualified contractors provides for more competitive bidding, and a better opportunity for cost reduction.



Despite written operating procedures, the purchase of fitness equipment for El Cerrito High School did not follow said procedures. These procedures require the bidding of contracts over \$65,100. Staff and management should ensure that proper purchasing procedures are followed for the purchase of any material and equipment.

## QUALITY CONTROL PROGRAM

Conceptual considerations to outfitting a completed school construction project with furniture, equipment and materials, as well as managing change orders throughout the construction process.

the District administration committee, the District administration

the performance auditors will

initial M-1A projects to the extent that the bond team did a more effective job of document development and bid sequence.

## ***II. Procurement Quality Control***

While the Pre-construction Quality Control Process was mostly done by the master architect, the Procurement Quality Control Process was under the purview of the bond manager. Because the Procurement Quality Control process is in place and followed, satisfactory outcomes have resulted.

## ***III. Construction Quality Control***

The Construction Quality Control process is implemented by the bond program manager and the master



As requested by the District, TSS has conducted a detailed review of one project, Lupine Hills (formerly J g t e w n g u + . " c u " c p " k p f l e c v q t " q h " c f j g t g p e g " v q " v j g " ö 3 E ö " u c p f c t f 0 K / c r r g c t u " v j c v " v j g " r m p u " c p f " u r g e k l e c v k p u " were developed and published to the standard. The review included materials actually used (substitutions) and the quality of execution.

**Midyear Report Update**

The initial work on Delivered Quality included a review of an audit sample of approved submittals as compared to specifications. There were no significant variances found in the sample documents.

## SCOPE, PROCESS AND MONITORING OF PARTICIPATION BY LOCAL FIRMS

### Background

In previous performance audits and report updates it has been noted that it is important to the Board of Education to encourage the participation and use of local services in the facilities construction program. This interest is articulated in the Project Labor agreement as follows:

To the extent permitted by law, it is in the interest of the parties to this agreement to utilize resources available in the local area, including those provided by minority-owned, women-owned, small, disadvantaged and other businesses.

To date, the District has used many local architects and other service providers offering a range of services with the term generally defined as one that maintains an office in the counties of San Francisco, Alameda, Contra Costa, Napa, Solano, and Marin.

There have additionally been legal obstacles to the awarding of contracts based on locality or geography.

The District has contracted with Davillier-Sloan, the current Labor Compliance Administrator, to conduct outreach in encouraging local firms to bid and participate in the facilities construction program. In conjunction with the bond management team, Davillier-Sloan has conducted training programs and offered guidance in the bidding process to encourage local competitive participation. The bond management team and Davillier-Sloan have been working to develop a Local Capacity Building Program creating clearly defined goals and objectives for local participation in the facilities construction projects.

### Midyear Report Update

Local firm participation in the facilities construction program has remained largely static for the last two years, following an increase in the participation as a result of the initial outreach. Both the bond management team and Davillier-Sloan have continued outreach efforts, and although substantial progress was made, initially there has not been continued growth in local participation.

Working with the bond management team, Davillier-

## EFFECTIVENESS OF THE COMMUNICATION CHANNELS AMONG ALL STAKEHOLDERS WITHIN THE BOND PROGRAM

### Background

To facilitate communication among stakeholders, promote the dissemination of information, and encourage community participation and involvement with the West Contra Costa Unified School District:

- Maintains a communication office;

- Has three (3) Internet sites:

- West Contra Costa Unified School District: [www.wccusd.k12.ca.us](http://www.wccusd.k12.ca.us)

- Bond Oversight Committee: [www.wccusd-bond-oversight.com](http://www.wccusd-bond-oversight.com)

- Bond Program: [www.wccusdbondprogram.com](http://www.wccusdbondprogram.com);

- Has a board policy on media relations;

- Has developed a procedures manual for print and electronic communications and media relations.

Also,

- The Bond Oversight Committee has established a Public Outreach Subcommittee to enhance communication among stakeholders.

In addition to the above internal communications programs and offices, the District has retained Craig Communications to aid in information planning and community outreach through public relations. In response to recommendations in previous audits, the district has been moving toward proactive information, rather than reactive responses in their internal and external communications.

### Midyear Report Update

As noted in the annual performance audit for the period ending June 30, 2005, program awareness and satisfaction are high with those closest to the program, and correlates in descending satisfaction as individuals move further from direct involvement with the program. The District staff continues to take proactive steps toward improving communication and level of satisfaction with the program for the groups not closely connected to the program.

The staff continues to work with Craig Communications for public relations consulting, and retains SGI to manage the bond program website.

The bond program site did not appear to be updated as frequently as internal reports indicated, although the site is currently current. As late as in June 2004, the staff reported the intention to have the site updated once per month. Out of date information, or lack of current information has been a recurrent problem throughout the bond program. Information contained on the new bond website in March 2006 did not contain any information about the passage of Measure J.





**OVERALL BOND PROGRAM**



**WEST CONTRA COSTA UNIFIED SCHOOL DISTRICT**  
Resolution No. 25-0506  
**RESOLUTION OF THE BOARD OF EDUCATION OF THE WEST  
CONTRA COSTA UNIFIED SCHOOL DISTRICT ORDERING A**

*Section 1.* Specifications of Election Order. Pursuant to sections 5304, 5322, 15100 *et seq.*, and section 15266 of the California Education Code, an election shall be held within the boundaries of the West Contra Costa Unified School District on November 8, 2005, for the purpose of submitting to the registered voters of the District the following proposition:

**BOND AUTHORIZATION**

By approval of this proposition by at least 55% of the registered voters voting on the proposition, the West Contra Costa Unified School District shall be authorized to issue and sell bonds of up to \$400,000,000 in aggregate principal amount to provide financing for the specific school facilities projects listed in the Bond Project List attached hereto as Exhibit A, subject to all of the accountability safeguards specified below.

**ACCOUNTABILITY SAFEGUARDS**

The provisions in this section are specifically included in this proposition in order that

a customary contingency for unforeseen design and construction costs. The final cost of each

*Section 8.* Delivery of Order of Election to County Officers. The Clerk of the Board of Education of the District is hereby directed to deliver, no later than August 12, 2005 (which date is not fewer than 88 days prior to the date set for the election), one copy of this Resolution to the Registrar of Voters of the County together with the Tax Rate Statement (attached hereto as Exhibit B), completed and signed by the Superintendent, and shall file a copy of this Resolution with the Clerk of the Board of Supervisors of the County.

*Section 9.* Ballot Arguments. The members of the Board are hereby authorized, but not directed, to prepare and file with the Registrar of Voters a ballot argument in favor of the proposition contained in Section 1 hereof, within the time established by the Registrar of Voters.

*Section 10.* Further Authorization. The members of this Board, the Superintendent, and all other officers of the District are hereby authorized and directed, individually and collectively, to do any and all things that they deem necessary or advisable in order to effectuate the purposes of this resolution.

*Section 11.* Effective Date. This Resolution shall take effect upon its adoption.

PASSED AND ADOPTED this day, July 13, 2005, by the following vote:

AYES:

NAYS:

ABSTAIN:

ABSENT:

APPROVED:

President of the Board of Education of the West Contra Costa Unified School District

Attest:

Clerk of the Board of Education of the West Contra Costa Unified School District

I, , Clerk of the Board of Education of the West Contra Costa Unified School District, of the County of Contra Costa, California, hereby certify as follows:

The attached is a full, true and correct copy of a resolution duly adopted at a meeting of the Board of Education of the District duly and regularly held at the regular meeting place thereof on July 13, 2005, and entered in the minutes thereof, of which meeting all of the members of the Board of Education had due notice and at which a quorum thereof was present.

The resolution was adopted by the following vote:

AYES:

NOES:

ABSTAIN:

ABSENT:

At least 24 hours before the time of said meeting, a written notice and agenda of the

**EXHIBIT A**  
**WEST CONTRA COSTA UNIFIED SCHOOL DISTRICT**  
**BOND PROJECT LIST**

**SECTION I**

**PROJECTS TO BE COMPLETED AT ALL SCHOOL SITES (AS NEEDED)**

**Security and Health/Safety Improvements**

- Modifications and renovations necessary for compliance with Americans with Disabilities Act (ADA).
- Improvements required for compliance with applicable building codes including the Field Act.
- Remove, abate, or otherwise mitigate asbestos, lead-based paint and other hazardous materials, as necessary.
- Install closed circuit television (CCTV) systems, as necessary, to provide secure environment for students, staff, and other users of the facilities.
- Survey, assess and mitigate seismic and structural issues and reinforce or replace existing structures, as necessary.
- Purchase necessary emergency equipment and provide adequate storage for such equipment.

**Major Facilities Improvements**

- Provide for required demolition in order to perform all work indicated below as well as the specific school site identified needs.
- Upgrade, install and/or replace, as necessary, intercom, alarm, bell, and clock systems.
- Renovate gymnasiums, or replace, as economically advantageous, and replace or install gymnasium equipment.
- Provide a technology backbone system for voice, data, and video communications to accommodate computer network systems, internet access, and other technology advancements; upgrade or install electrical wiring and power for all systems, and provide computers and other technology equipment.
- Assure that all instructional areas and classrooms are provided with telephone service in order to enhance safety and security.
- Improve, upgrade and/or replace heating, ventilation and air conditioning systems, (including energy management systems).
- Improve, upgrade and/or replace electrical systems and equipment.
- Improve, upgrade and/or replace plumbing lines and equipment.
- Install or upgrade energy efficient systems.
- Improve, replace and/or install new outdoor lighting to improve security, safety and enhance evening educational events or athletic activities.
- Renovate, improve, relocate and/or create adequate trash enclosures.
- Renovate, add, or replace lockers.
- Construct, relocate and/or improve lunch shelters.
- Furnish and/or replace emergency evacuation, building identification and address signage and monument signs.
- Replace doors, hardware, windows and window coverings.





**BOND MEASURE D  
WEST CONTRA COSTA UNIFIED SCHOOL DISTRICT**

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**TAX RATE STATEMENT IN CONNECTION WITH  
BOND MEASURE D**

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## Exhibit A

### **WEST CONTRA COSTA UNIFIED SCHOOL DISTRICT BOND PROJECT LIST**

#### **SECTION I**

#### **PROJECTS TO BE COMPLETED AT ALL SCHOOL SITES**

(As needed, upon final evaluation of each site.)

##### Security and Health/Safety Improvements

Modifications and renovations necessary for compliance with Americans with Disabilities Act (ADA).

Improvements required for compliance with applicable building codes including the Field Act. Remove, abate, or otherwise mitigate asbestos, lead-based paint and other hazardous materials, as necessary.

Install closed circuit television (CCTV) systems, as necessary, to provide secure environment for students, staff, and other users of the facilities.

Survey, assess and mitigate seismic and structural issues and reinforce or replace existing structures, as necessary, except at Hercules Middle/High School and Richmond Middle School.

Purchase necessary emergency equipment and provide adequate storage for such equipment.

##### Major Facilities Improvements

Provide for required demolition in order to perform all work indicated below as well as the specific school site identified needs.

Upgrade, install and/or replace, as necessary, intercom, alarm, bell, and clock systems.

Renovate gymnasiums, or replace, as economically advantageous, and replace or install gymnasium equipment.

Provide a technology backbone system for voice, data, and video communications to accommodate computer network systems, internet access, and other technology advancements; upgrade or install electrical wiring and power for all systems, and provide computers and other technology equipment.

Assure that all instructional areas and classrooms are provided with telephone service in order to enhance safety and security.

Improve, upgrade and/or replace heating, ventilation and air conditioning systems, (including energy management systems).

Improve, upgrade and/or replace electrical systems and equipment.

Improve, upgrade and/or replace plumbing lines and equipment.

Install or upgrade energy efficient systems.

Improve, replace and/or install new outdoor lighting to improve security, safety and enhance evening educational events or athletic activities.

Renovate, improve, relocate and/or create adequate trash enclosures.

Renovate or replace lockers.

Construct, relocate and/or improve lunch shelters.

Furnish and/or replace emergency evacuation, building identification and address signage and monument signs.

Replace doors, hardware, windows and window coverings.

Create, renovate and/or improve kitchen areas, including replacement of specialized equipment and furnishings.

Renovate, upgrade or install library areas, including seismic restraints for shelving.

Renovate, improve or replace restrooms.

Renovate, improve or replace roofs.

Re-finish and/or improve exterior and interior surfaces, including walls, ceilings, and floors.

Upgrade, improve, install and/or replace indoor lighting systems.

Provide furnishings and equipment for improved or newly constructed classrooms and administrative facilities.

Replace worn/broken/obsolete instructional and administrative furniture and equipment, as well as site furnishings and equipment.

Purchase, rent, or construct temporary classrooms and equipment (including portable buildings) as needed to house students displaced during construction.

Acquire any of the facilities on the Bond Project List through temporary lease or lease-purchase arrangements, or execute purchase options under a lease for any of these authorized facilities.

Construct regional School District Maintenance and Operations Yard or Yards at current District locations as necessary.

As to any major renovation project, replace such facility if doing so would be economically advantageous.

Sitework



<u>Improvements/Rehabilitation</u>	<p>Renovate library.          Improve/replace floors.          Replace sinks in science lab.          Improve and paint interior walls.          Renovate stage.          Improve/replace ceilings.          Replace acoustic tiles in cafeteria.</p>
<u>Construction/Renovation of Classroom and Instructional Facilities</u>	<p>Renovate cafeteria side room or computer room for          Expand textbook room.          Renovate shower rooms.          Renovate shop room.          Renovate classroom 602.          Expand counseling office</p>
<u>Furnishing/Equipping</u>	<p>Replace fold down tables in cafeteria.          Install or replace whiteboards, tackboards and counters.</p>

<u>PROJECT TYPE</u>	<p><u>Helms Middle School</u>  <u>2500 Road 20, San Pablo, CA 94806-5010</u>  <u>Project List</u></p>
	<p>Rtq lgevu"cu"cr r tq r tkvg'htqo "vj g'čC mUejqqnUkguö"          list.</p>
<u>Major Building Systems</u>	<p>Improve/replace roof and skylights.</p>
<u>Improvements/Rehabilitation</u>	<p>Improve/replace glass block walls.          Improve/replace floor surfaces.          Improve/replace ceilings.          Repaint locker rooms.          Replace carpet.          Improve and paint interior walls.</p>
<u>Construction/Renovation of Classroom and Instructional Facilities</u> <u>Site and Grounds Improvements</u>	<p>Demolish and replace two portable classrooms.</p>

<u>Major Building Systems</u>	Add additional buildings or portables to address overcrowding.
<u>Improvements/Rehabilitation</u>	Install additional outdoor and indoor water fountains.
<u>Furnishing/Equipping</u>	Install lockers. Provide and install new furniture and equipment.

<u>PROJECT TYPE</u>	<u>Pinole Middle School</u> <u>1575 Mann Drive, Pinole, CA 94564-2596</u> <u>Project List</u>
- <u>Improvements/Rehabilitation</u>	R tq lgevu"cu"cr r tq r tkvg'htqo "vj g'õC m'Uejqqn'Ukguö" list. Improve/replace floors. Improve/replace ceilings. Improve/replace exterior doors. Strip wallpaper and paint interior corridors. Add ventilation to Woodshop. Improve/replace overhang at snack bar. Improve and paint interior walls. Improve/replace skyligh80112.0(g)









<u>Improvements/Rehabilitation</u>	<p>Improve and paint interior walls.          Improve/replace ceilings.          Improve/replace floors.          Replace carpet.          Correct or replace ventilation/cooling system in computer lab.          Improve partition walls between classrooms 313/311 and 207/209.          Reconfigure wires and cables in computer lab.          Replace broken skylights.</p>
<u>Construction/Renovation of Classroom and Instructional Facilities</u>	<p>Demolish and replace approximately thirty-five (35) portable classrooms.          Add/provide flexible teaching areas and parent/teacher rooms.          Add storage.</p>
<u>Furnishing/Equipping</u>	<p>Add new soundboard in cafeteria.          Install or replace whiteboards, tackboards and counters.</p>

<u>PROJECT TYPE</u>	<p><u>De Anza High School and Delta High School</u>  <u>5000 Valley View Road, Richmond, CA 94803-2599</u>  <u>Project List</u></p>
-	<p>R tq lgeu"cu"cr r tq r tkvg'htqo "vj g"öC mR "</p>

	<p align="center"><u>Gompers High School</u>  <u>1157 9<sup>th</sup>. Street, Richmond, CA 94801-3597</u>  <u>Project List</u></p>
	<p>R tq lgevu"cu"cr r tq r tkvg'htqo "vj g'ŮC mUejqqnŮkguö"  list.</p>
n	<p>Improve or add ventilation/cooling system to  computer lab.  Replace outdoor and indoor water fountains.  Improve/replace floors and carpet.  Add sinks to Stop-Drop classrooms.  Improve/replace interior and exterior doors and locks.  Add new partition walls in classroom 615.  Improve and paint interior walls.  Improve/replace ceilings.</p>
<u>Classroom</u>	<p>Add science lab.  Add lunch area for students.  Add area for bicycle parking.</p>
	<p>Install or replace whiteboards, tackboards and  counters.</p>
	<p align="center"><u>North Campus High School</u>  <u>and Transition Learning Center</u>  <u>2465 Dolan Way, San Pablo, CA 94806-1644</u>  <u>Project List</u></p>

R tq lgevu"cu"cr r tq r tkvg'htqo "vj

<u>Security and Health/Safety Improvements</u>	Improve fences and gates to alleviate security issues.
<u>Improvements/Rehabilitation</u>	Remodel offices. Add weather protection for walkways and doors. Improve and paint interior walls. Improve/replace ceiling tiles. Replace carpet.
<u>Construction/Renovation of Classroom and Instructional Facilities</u>	Add multi-purpose room. Add cafeteria. Add library. Move/add time-out room. Add flexible teaching areas, counseling, and conference rooms.
<u>Site and Grounds Improvements</u>	Add play structures/playgrounds. Improve site circulation. Add bicycle parking to site. Resolve parking inadequacy.
<u>School Support Facilities</u>	Add storage space. Add restrooms for students and staff.

Furnishing/Equipp-13.0(t)-1.9(e)49(st)-2.9o9(E)1.0 .44(E)1v9.24 -0.59 re

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# **APPENDIX C**

**WEST CONTRA COSTA UNIFIED SCHOOL DISTRICT**  
Resolution No. 25-0506

**RESOLUTION OF THE BOARD OF EDUCATION OF THE WEST CONTRA COSTA UNIFIED SCHOOL DISTRICT ORDERING A SCHOOL BOND ELECTION, AND AUTHORIZING NECESSARY ACTIONS IN CONNECTION THEREWITH**

Y JGTGCU."vjg'Dqctf"qh'Gfwecvkqp"\*vjg"öDqctfö+"qh"vjg"Y guv'Eqpvtc'E quc'Wpkkgf'Uejqqn'F kvtlev' \*vjg"öF kvtlevö+.y kvjlp"vjg'E qwpv{"qh'E qpvtc'E quc.'E crkqtpk"\*vjg"öE qwpv{ö, is authorized to order elections within the District and to designate the specifications thereof, pursuant to sections 5304 and 7544"qh'vjg'E crkqtpk'Gfwecvkqp'E qfg"\*vjg"öGfwecvkqp'E qfgö=





*Special Bond Proceeds Account; Annual Report to Board.* Upon approval of this proposition and the sale of any bonds approved, the Board of Education 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 January 1 of each year, commencing January 1, 2007, stating (1) the amount of bond proceeds received and expended in that year, and (2) the status of any project funded or to be funded from bond proceeds. The report may relate to the calendar year, fiscal year, or other appropriate annual period as the Superintendent shall determine, and may be incorporated into the annual budget, audit, or other appropriate routine report to the Board.

## **BOND PROJECT LIST**

The Bond Project List attached to this resolution as Exhibit A shall be considered a part of the ballot proposition, and shall be reproduced in any official document required to contain the full statement of the bond proposition. The Bond Project List, which is an integral part of this proposition, lists the specific projects the West Contra Costa Unified School District proposes to finance with proceeds of the Bonds. Listed repairs, rehabilitation projects and upgrades will be completed as needed. Each project is assumed to include its share of costs of the election and bond issuance, architectural, engineering, and similar planning costs, construction management, and a customary contingency for unforeseen design and construction costs. The final cost of each project will be determined as plans are finalized, construction bids are awarded, and projects are completed. In addition, certain construction funds expected from non-bond sources, including State grant funds for eligible projects, have not yet been secured. Therefore the Board of Education cannot guarantee that the bonds will provide sufficient funds to allow completion of all listed projects.

## **FURTHER SPECIFICATIONS**

*No Administrator Salaries.* Proceeds from the sale of bonds authorized by this proposition shall be used 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 not for any other purpose, including teacher and administrator salaries and other school operating expenses.

*Single Purpose.* All of the purposes enumerated in this proposition shall be united and voted upon as one single proposition, pursuant to section 15100 of the California Education Code, and all the enumerated purposes shall constitute the specific single purpose of the bonds, and proceeds of the bonds shall be spent only for such purpose, pursuant to section 53410 of the California Government Code.

*Other Terms of the Bonds.* When sold, the bonds shall bear interest at an annual rate not exceeding the statutory maximum, and that interest will be made payable at the time or times permitted by law. The bonds may be issued and sold orayrat fyiesbond0(n)-9.9(d)-360.0()3.0270.0(1)-11la thelaurahatl yearwfaomhe dte drto

*Section 2.*

days prior to the date set for the election), one copy of this Resolution to the Registrar of Voters of the County together with the Tax Rate Statement (attached hereto as Exhibit B), completed and signed by the Superintendent, and shall file a copy of this Resolution with the Clerk of the Board of Supervisors of the County.

*Section 9. Ballot Arguments.* The members of the Board are hereby authorized, but not directed, to prepare and file with the Registrar of Voters a ballot argument in favor of the proposition contained in Section 1 hereof, within the time established by the Registrar of Voters.

*Section 10. Further Authorization.* The members of this Board, the Superintendent, and all other officers of the District are hereby authorized and directed, individually and collectively, to do any and all things that they deem necessary or advisable in order to effectuate the purposes of this resolution.

*Section 11. Effective Date.* This Resolution shall take effect upon its adoption.

PASSED AND ADOPTED this day, July 13, 2005, by the following vote:

AYES:

NAYS:

ABSTAIN:

ABSENT:

APPROVED:

President of the Board of Education of the West Contra Costa Unified School District

Attest:

Clerk of the Board of Education of the West Contra Costa Unified School District

I, Clerk of the Board of Education of the West Contra Costa Unified School District, of the County of Contra Costa, California, hereby certify as follows:

The attached is a full, true and correct copy of a resolution duly adopted at a meeting of the Board of Education of the District duly and regularly held at the regular meeting place thereof on July 13, 2005, and entered in the minutes thereof, of which meeting all of the members of the Board of Education had due notice and at which a quorum thereof was present.

The resolution was adopted by the following vote:

AYES:

NOES:

ABSTAIN:

ABSENT:

At least 24 hours before the time of said meeting, a written notice and agenda of the meeting was mailed and received by or personally delivered to each member of the Board of Education not having waived notice thereof, and to each local newspaper of general circulation, radio, and television station requesting such notice in writing, and was posted in a location freely accessible to members of the public, and a brief description of the resolution appeared on said agenda.

I have carefully compared the same with the original minutes of the meeting on file and of record in my office. The resolution has not been amended, modified or rescinded since the date of its adoption, and the same is now in full force and effect.

WITNESS my hand this 13<sup>th</sup> day of July, 2005.

Clerk of the Board of Education

**EXHIBIT A**

**WEST CONTRA COSTA UNIFIED SCHOOL DISTRICT  
BOND PROJECT LIST**

**SECTION I  
PROJECTS TO BE COMPLETED AT ALL SCHOOL SITES (APPLICABLE)**

**Security and Health/Safety Improvements**

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ÉT go qxg."cdcvg ðr otherwise mitigate asbestos, lead-based paint and other hazardous materials, as  
necessary.  
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students, staff, and other users of the facilities.  
ÉUwtxg{ assess and mitigate seismic and structural issues and reinforce or replace existing structures,  
necessary.  
ÉRwtej cug"p

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ÉT gfinish and/or improve exterior and interior surfaces, including walls, ceilings, and floors.

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## **SECONDARY SCHOOL PROJECTS**

Remaining Election of March 5, 2002, Measure D, projects. All Secondary Schools may include projects, as necessary, from Section I.

## **RECONSTRUCTION PROJECTS**

The following projects will be completed as part of the reconstruction program of the district, as funds allow. The reconstruction program includes the following:

- Health and Life Safety Improvements
- Code upgrades for accessibility
- Seismic upgrades
- Systems Upgrades
- Electrical
- Mechanical
- Plumbing
- Technology
- Security
- Technology Improvements
- Data
- Phone
- CATV (cable television)
- Instructional Technology Improvements
- Whiteboards
- TV/Video
- Projection Screens

In addition, the reconstruction program includes the replacement of portable classrooms with permanent structures, the improvement or replacement of floors, walls, insulation, windows, roofs, ceilings, lighting, playgrounds, landscaping, and parking, as required or appropriate to meet programmatic requirements and depending on the availability of funding.

## **PROJECT SCOPE**

- De Anza High School Reconstruction/New Construction
- Kennedy High School Reconstruction/New Construction
- Pinole Valley High School Reconstruction/New Construction
- Richmond High School Reconstruction
- Castro Elementary School Reconstruction
- Coronado Elementary School Reconstruction
- Dover Elementary School Reconstruction
- Fairmont Elementary School Reconstruction
- Ford Elementary School Reconstruction
- Grant Elementary School Reconstruction
- Highland Elementary School Reconstruction



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King Elementary School Reconstruction  
Lake Elementary School Reconstruction  
Nystrom Elementary School Reconstruction  
Ohlone Elementary School Reconstruction/New Construction  
Valley View Elementary School Reconstruction  
Wilson Elementary School Reconstruction

**EXHIBIT B**  
**TAX RATE STATEMENT**

An election will be held in the Y guvE qpvtc'E qucWpkhgf 'Uej qqn'F kvtkv'\*vj

# **APPENDIX D**

## REFERENCE DOCUMENTS

### **Measures M, D & J Ballot Language**

Bond Measure M óBallot Language. November 7, 2000.

Bond Measure D óBallot Language. March 5, 2002.

Bond Measure J óBallot Language. November 8, 2005.

### **Audit Reports**

WCCUSD Audit Reports, Fiscal Years 2000-01 through 2004-05.

WCCUSD Bond Financial Audit Report, Fiscal Years 2000-01 through 2004-05.

### **Measures M and D Budget/Expenditure Reports**

WCCUSD Measures M and D Expenditure Reports through December 31, 2005.

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# **APPENDIX E**

**SUMMARY FINDINGS AND RECOMMENDATIONS  
MEASURE D AND MEASURE M  
PERFORMANCE AUDIT  
JUNE 30, 2005**

For reference, the findings and recommendations included in the 2004-05 annual performance audit are included in this appendix. The status of those findings and recommendations will be assessed and included in the 2005-06 annual performance audit, scheduled for final delivery to the District on December 15, 2006. Also to be included in that audit report will be the status of findings and recommendations included in the 2002-03 and 2003-04 audit reports.







**DISTRICT AND PROFESSIONAL SERVICES STAFFING PLAN**  
**FOR THE BOND PROGRAM**

**Finding (page 39)**

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**DISTRICT POLICIES AND GUIDELINES FOR FACILITIES PROGRAM**

**Recommendation (page 53)**

TSS recommends that the District continue to work on revising and updating its policies.

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## BIDDING AND PROCUREMENT PROCEDURES

### Findings (page 54-55)

The District needs to ensure that its practice of requiring two or three quotes for materials or services greater than \$2,000 is observed. The bond management team can assist with this practice by attaching copies of all quotes received to the requisition form (for the public record).

Purchases such as leases of portables or purchases of furniture and equipment did not include references to the bid it was piggybacking. To remain compliant with the public contract code, references should be included to identify the original bid with the CMAS number.

Costs ranging from \$9,000 to \$12,000, a difference of 33 percent between the high and low. The differences in the cost range should be better explained in the proposal to ensure that the District is charged a fair and appropriate amount for services and materials.

### Recommendations (page 54-55)

It is recommended the District ensure that documentation showing compliance with the competitive bidding process is maintained either by attaching other quotes to the requisition or indicating the bid or CMAS agreement numbers on the bid. References to the original bid or CMAS number for purchases that exceed the bid limit should be made in the purchase order documentation.

It is recommended the District spot-check piggybacked bids by comparing them with random quotes to ensure the method is more economical than bidding. (It is important to note that CMAS purchases may incur a surcharge of up to 2.56 percent to be invoiced a year later.)

For better control, management and evaluation of bids, it is recommended that staff require bidders to itemize their bids to ensure vendors do not overcharge the District. To avoid misunderstandings or overcharges, the District should require vendors to supply an explanation or itemization of fee structures when the vendors offer a range of prices.

## **CHANGE ORDER AND CLAIM AVOIDANCE PROCEDURES**

### **Findings (page 57-58)**

Change orders are typically reserved for unforeseen conditions or conflicting information in drawings. It is generally unwise to use change orders to add or modify the scope of work in a project. The disadvantages using change orders to add scope of work lie in the absence of competitive pricing and the consequent difficulty in determining true-market value. Examples of this practice in the District include the following projects:

- The addition of a north-end parking lot at Montalvin

## **PAYMENT PROCEDURES**

### **Findings (page 59-60)**

The time of payments can be shortened. Only twenty five (25) percent of the sampled invoices took four (4) weeks or fewer to pay from the date of the invoice. Forty (40) percent of the sampled invoices took approximately three (3) months or more for payments from the date of the invoice. One of the least timely invoices was for furniture and equipment, which took twenty (20) weeks to pay.

During the course of the audit, one of the sample invoices for \$217,025 was not available for audit because paperwork was not in the file.

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for Bond Program expenditures.



It is recommended that the District verify with their legal counsel the validity of accepting certified payroll records without original signatures.

It is recommended that District enforce contract conditions for nonperforming /underperforming contractors. When work delays caused by the contractor affect the



## **DELIVERED QUALITY REVIEW**

### **Finding (page 66)**

On May 24, 2005, the District Engineering Officer presented a status report that included a component relative to Measure D Secondary Projects, Geotechnical Work Update. This section of the report provided an update of the new field work accomplished at five schools. The new geotechnical work was necessary due to the alleged inadequacy of the original geotechnical work. Since geotechnical data is a primary basis of structural design when an inadequacy is substantiated, the District finds itself in a position of incurring expenses to either correct soils conditions, add scope to compensate for newly verified conditions not accommodated in the original design, and/or relocate buildings on the site (or consider a different site altogether).

### **Recommendation (page 66)**

A quality review mechanism in advance of structural design is needed. The District should work with the bond management team to develop such mechanism(s).

## **SCOPE, PROCESS AND MONITORING OF PARTICIPATION BY LOCAL FIRMS**

### **Recommendation (page 67)**

It is recommended that the outreach to firms within the defined parameters for participation in the bond program projects.

**EFFECTIVENESS OF THE COMMUNICATION CHANNELS AMONG ALL  
STAKEHOLDERS WITHIN THE BOND PROGRAM**

**Findings (page 68)**

While communication at the staff level has improved, as reflected by the survey responses, communication between the district and the non-staff stakeholders remains a challenge. District staff appears to be aware of the need to implement improvements in this area.

The WCCUSD web-site and BOC site continue to list out of date information, though it is linked to the bond program site that has current information clearly listed. As of November 8, 2005, the WCCUSD site contained information about the chosen plan for El Cerrito High School, but no update on the construction that has begun. Again, as of November 8, 2005, the BOC site listed information of October 26, 2005.

**Recommendations (page 68)**

It is recommended that the District staff keep current information listed on the WCCUSD web site regarding the bond program projects, or refrain from posting long out of date information and simply provide a link in the update section to the bond program website.

It is recommended that that Bond Oversight Committee website be updated following the committee meetings to ensure that the current information is provided to users.

It is recommended that communication from the district to the public involve more long-range planning for the updates that are being provided to the community. The district should continue to move toward a proactive communications process, with more focus on planned public relations engagements conceived by an agency specializing in public communications. Based on survey results it is recommended that the district engage in more direct communication with communities anticipating involvement in the bond program.

**Findings (page 68)**

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**Recommendation (page 68)**

It is recommended that training should be provided to the CBOC informing them of their role and requesting active engagement of the committee members in public awareness and information process.

**Finding (page 68)**

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**Recommendation (page 68)**

It is recommended that the District ensure that it gives the oversight committee the kphq to cvqp" kv" pggfu" kp" c" vko gn{ " hcujkqp." cu" qpg" qh" vjg" eqo o kwggau" rtko ct{ " tguqpukdkkku"ku

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## OVERALL BOND PROGRAM

### Findings (page 70)

There appears to be a disconnect between SGI cpf "vjg" F kvtkvau "hucen" ugtxlegu "uvch."  
which is causing sig1.9(s)-611.0(c)4.0(a)4.0(usi)-2.9(n1 0 s)-6f0(t)-1.0(c)4.0(a)4-13.0(nt9(g)2be)-4-6]