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ANAHEIM UNION HIGH SCHOOL DISTRICT

Measure H Construction Bond Program

Annual/Final Report: March 2024 – February 2025



Anaheim Union High School District
Citizens' Bond Oversight Committee



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Executive Summary 2024 - 2025

On March 7, 2024, we presented the Committee's Annual Report (March 2023 – February 2024) to the Board of Trustees in public session.

The following is a summary of the Committee's activities from March 2024 through February 2025.

The Committee met one time during this period and made a site visit to Magnolia High School. The Committee met on the following date:

❖ February 19, 2025

Specific Meeting Topics

- We visited Magnolia High School to tour the completed New Administration and Cybersecurity Classroom Building Project. We observed the new building and its surrounding sitework.
- We received a presentation and reviewed the Financial and Performance Audits for the year ending June 30, 2024, that was prepared by Eide Bailly, the District's auditing firm. The auditor stated that 80% of Measure H expenditures were tested. The final audit reports were presented to the Board of Trustees on January 16, 2025.



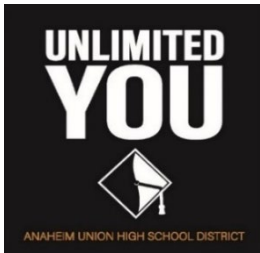
Executive Summary 2015 - 2025

The following is a summary of the Committee's activities from July 2015 through February 2025.

The Committee met a total of **36 times** since the inception of the Citizens' Bond Oversight Committee in 2015, making various site visits Districtwide.

General Meeting Topics

- We received design and construction project updates for various Measure H projects
- We received final cost reports for completed Measure H projects
- We received and reviewed project budgets
- We received and reviewed the list of upcoming Measure H projects and preliminary budgets
- We received and reviewed the expenditure reports related to the Anaheim Union High School District (Orange County, California) General Obligation Bond, Election of 2014 - Series 2015 (\$63.5M), Series 2018 (\$83M) and Series 2019 (\$102M)



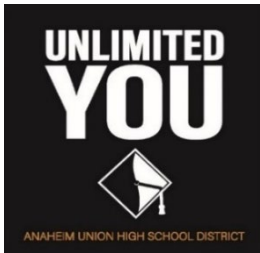
Annual Report

Based on our review of the Financial and Performance Audit Report dated June 30, 2024, project updates and site visits, we are confident the AUHSD is expending the bond proceeds only for the purposes as set forth in the Measure H Bond Program and not for other purposes. We are satisfied with efforts being made to complete all projects as planned and in a cost-effective manner, and will continue to diligently monitor those efforts.

The Anaheim Union High School District Board of Education established the Citizens' Bond Oversight Committee (CBOC) by Resolution No. 2014/15-B-02. The Committee is established under the guidelines of Measure H Bond election. Measure H was approved by the voters on November 4, 2014, and authorized the issuance of \$249,000,000 in general obligation bonds for capital improvement projects throughout the District.

Purpose

The purpose of the CBOC is to inform the public, at least annually in public session, concerning the expenditure of bond proceeds as approved by the voters on November 4, 2014. Bond proceeds may be expended only on capital improvement projects as defined by Exhibit B of Resolution No. 2014/15-B-02.



Committee Membership

❖ **Alan Walker** (Chairperson)

Member Active in a Business Organization

❖ **Blanca Jauregui**

Member Active in a Senior Citizens' Organization

❖ **Jessie Alvarez**

Parent of a Student Enrolled in the District

❖ **Peggy Kruse-Stodghill,**

Parent and PTA Member

❖ **Brenda Soto Bryan**

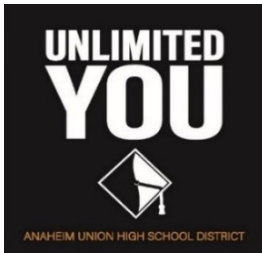
Member Active in a Bonafide Taxpayer Organization

❖ **Moses Kim**

Member Active in a Business Organization

❖ **Robert Nelson**

Member At-Large

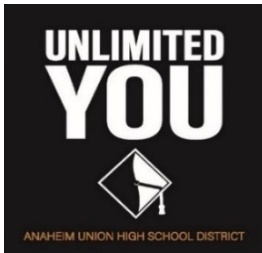


Committee Duties

The CBOC actively reviews Measure H expenditures, annual financial and performance audits, financial statements, and staff reports regarding Bond sales, use of the proceeds, and progress of various capital projects that are funded by Measure H proceeds.

The specific activities of the CBOC includes the following:

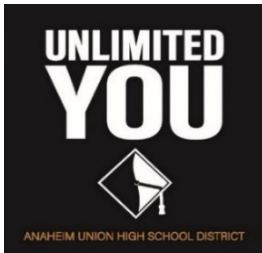
1. Review, revisions and approval of the Committee Bylaws
2. Review of current projects in the Facilities Master Plan, including updates
3. Visits to construction sites
4. Attend regular meetings as a committee
5. Review of various reports and information including:
 - Annual performance and financial audits
 - Quarterly expenditure reports
 - Construction project updates
 - Planning status of future construction projects utilizing Measure H Bond funds
 - Various staff reports



Committee Duties

Committee Activities (continued)

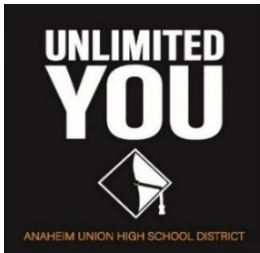
6. Review of bond series issuance details
7. Review of efforts of the District to maximize bond revenues by accessing state matching funds and implementing cost-savings measures
8. Adherence to the Brown Act requirements of publicized and open meetings



The Measure H Bond Series

\$249M Bond Measure approved by voters in November 2014

➤ Bond Series 2015:	\$63,455,000
	+
➤ Bond Series 2018:	\$83,000,000
	+
➤ Bond Series 2019:	<u>\$102,545,000</u>
	=
	\$249,000,000



2015 Bond Series

June 2015 – January 2023 Measure H Expenditure Summary

Bond Series 2015 Proceeds	\$63,455,000.00
Other Local Revenue	\$ 5,038.74
Interest	\$ 1,004,116.16
Leases and Rentals	\$ 11.00
Total Proceeds	\$ 64,464,165.90
Expenditures as of January 31, 2023	(\$ 64,464,165.90)
Balance Bond Series 2015	\$ 0.00

The following is the detail summary of the Measure H Expenditures as of January 31, 2023

A. PPM, Design, Inspection, and Testing	\$9,452,443.05
A1. Construction	\$26,510,532.31
A2. District Project Management	\$576,488.62
B. 21 st Century Furniture	\$7,489,320.12
C. 2012 Certificate of Participation Payoff	\$19,883,505.98
D. Bond Administration Costs and Interest Expense	\$551,875.82

TOTAL EXPENSES:	\$64,464,165.90
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2018 Bond Series

April 2018 – January 2023 Measure H Expenditure Summary

Bond Series 2018 Proceeds	\$83,000,000.00
Other Local Revenue	\$ 242,244.96
Interest	<u>\$ 3,200,635.02</u>
Total Proceeds	\$ 86,442,879.98
Expenditures as of January 31, 2023	<u>(\$86,442,879.98)</u>
Balance Bond Series 2018	\$ 0.00

The following is the detail summary of the Measure H Expenditures as of January 31, 2023

A. PPM, Design, Inspection, and Testing	\$10,653,934.05
A1. Construction	\$72,428,442.05
A2. District Project Management	\$839,046.90
B. 21 st Century Furniture	\$1,420,988.54
B1. Equipment — FFE	\$147,141.72
B2. Graphic Arts	\$1,515.00
C. 2012 Certificate of Participation Payoff	\$0.00
D. Bond Administration Costs and Interest Expense	\$951,811.72


TOTAL EXPENSES:	\$ 86,442,879.98
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2019 Bond Series

November 2019 – January 2025 Measure H Expenditure Summary

Bond Series 2019 Proceeds	\$ 102,546,925.16
Other Local Revenue	\$ 1,612.75
Interest	\$ 5,001,067.00
Net Changes in Investments	\$ (433.00)
Leases and Rentals	\$ 1.00
IFT-IN Other Authorized IFT	\$ 14,154.12
Total Proceeds	\$ 107,563,327.03
Expenditures as of January 31, 2025	(\$ 107,562,085.85)
Balance Bond Series 2019	\$ 1,241.18

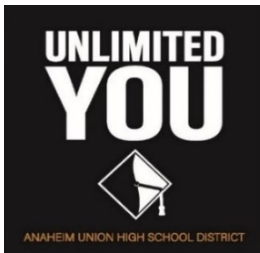


Balance of Bond Series 2019 represents interest earned

The following is the detail summary of the Measure H Expenditures as of January 31, 2025

A. PPM, Design, Inspection, and Testing	\$14,907,879.85
A1. Construction	\$88,468,492.12
A2. District Project Management	\$1,856,171.25
B. 21 st Century Furniture	\$1,335,947.87
B1. Equipment — FFE	\$288,426.83
C. 2012 Certificate of Participation Payoff	\$0.00
D. Bond Administration Costs and Interest Expense	\$705,165.93

TOTAL EXPENSES: \$107,562,085.85

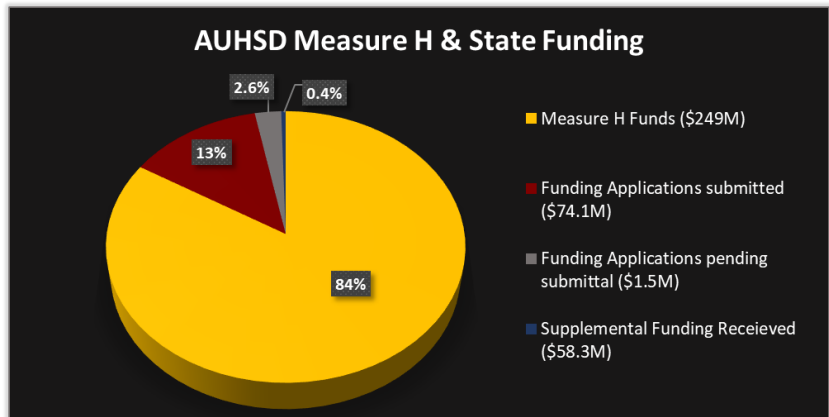


State Funding Applications

No.	Project Name	Pending Funding	Funding Received
Modernization/New Construction			
1	AHS Aquatic Center - Modernization		\$6,254,813
2	AHS Fire Alarm Upgrade	\$976,302	
3	AHS HVAC Upgrades	\$937,125	
4	AHS Track and Field Improvements	\$6,467,598	
5	AHS Hydronic Piping	\$2,374,583	
6	AHS Theatrical Rigging *	\$1,496,756	
7	Ball JHS Parking Lot Ph 1	\$1,180,348	
8	Ball JHS Site Imp. and Modernization Ph 2	\$1,448,209	
9	Brookhurst JHS Fire Alarm	\$1,223,163	
10	Cypress HS Site Improvements		\$3,795,221
11	Cypress HS Field	\$2,303,478	
12	Dale JHS New Construction		\$1,571,582
13	Dale JHS Modernization		\$3,410,041
14	Katella HS Site Improvements		\$7,690,502
15	Kennedy HS Site Improvements Phase 1		\$1,699,232
16	Kennedy HS Site Improvements Phase 2		\$2,149,717
17	Magnolia HS Site Improvements	\$4,973,593	
18	Magnolia HS Shower / Locker Modernization	\$1,175,602	
19	Magnolia HS Modernization	\$3,855,164	
20	Orangeview JHS Site Improvements Phase 1	\$6,627,631	
21	Oxford Academy New Construction (WITHDRAWN)	\$0	
22	Oxford Academy Modernization		\$2,802,286
23	Polaris Modernization		\$4,578,585
24	Savanna HS Site Improvements (Inc. 1 & 2)		\$4,711,581
25	South JHS HVAC	\$1,898,130	
26	Sycamore JHS Site Imp. and Modernization	\$7,672,618	
27	Western HS Parking Lot		\$2,579,977
28	Western HS Practice Field	\$8,253,521	
29	Western HS Gym	\$5,742,973	
30	Western HS Site Improvements Phase 1	\$5,170,035	
31	Western HS HVAC	\$6,929,400	

CTE Grants			
32	Magnolia HS CTE		\$1,137,053
33	Katella HS CTE Culinary Arts		\$1,139,295
34	Oxford Academy CTE		\$1,302,330
Facility Hardship Grant			
35	AHS Aquatic Center (FH)		\$2,531,711
36	Katella HS Pool Reconstruction (FH)		\$4,033,235
37	Magnolia HS Pool Reconstruction (FH)		\$2,949,176
Congressional Grant			
38	Anaheim HS Cook Auditorium		\$2,000,000
DROPS Grant			
39	Katella HS DROPS Site Improvement		\$2,000,000
CALFIRE Grant			
41	Gilbert HS Site Improvements	\$2,475,000	
42	South JHS Site Improvements	\$2,475,000	
Total Pending & Received Supplemental Funding		\$75,656,229	\$58,336,337
Total Supplemental Funding		\$133,992,566	

(*) Soon to be submitted (Estimated Value)



Magnolia HS New Administration & Cybersecurity Classroom Building Project

COMPLETED



Within Budget ✓
Total Project Budget: \$47.9M
Original Contract Value: \$38.3M
Final Contract Value: \$38.9M
Total Expended to Date: \$44M



Magnolia HS Art Classrooms & Courtyard Project

COMPLETED

On Schedule ✓
Within Budget ✓
Total Project Budget: \$3.7M

Original Contract Value: \$2.8M
Final Contract Value: \$2.9M

Total Expended to Date: \$2.7M



Western High School Practice Field Project

COMPLETED



Within Budget ✓
Total Project Budget: \$14.9M

Original Contract Value: \$11.4M
Final Contract Value: \$11.7M

Total Expended to Date: \$13.7M



Katella High School Pool Renovation Project

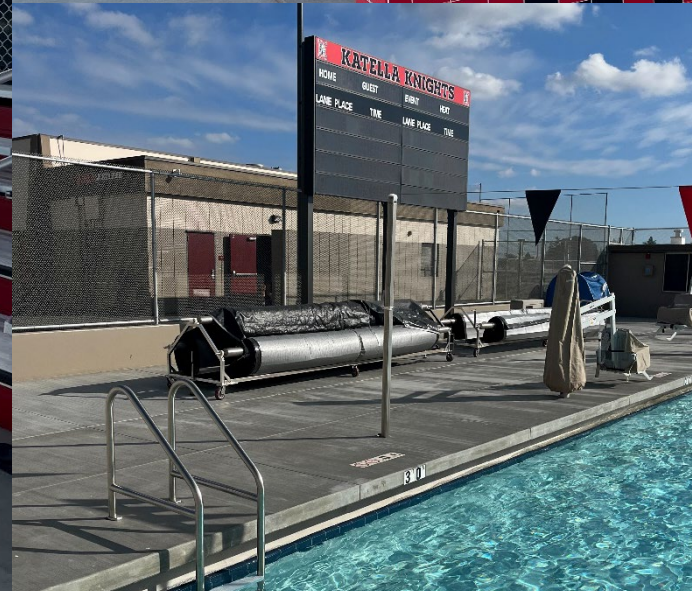
COMPLETED



Within Budget ✓
Total Project Budget: \$7.3M

Original Contract Value: \$5.4M
Final Contract Value: \$5.8M

Total Expended to Date: \$6M



Marquee Projects at Various Sites/District Office Fencing



On Schedule✓
Within Budget ✓
Total Project Budget: \$5.6M

Original Contract Value: \$4.8M
Final Contract Value: \$4.8M

Total Expended to Date: \$5.2M



COMPLETED

On Schedule ✓
Within Budget ✓
Total Project Budget: \$5.1M

Contract Value: \$4.1M
Total Expended to Date: \$3.5M

Katella Culinary Arts Project



COMPLETED

Katella MPR/Dance ADA Barrier Removal Project

COMPLETED

On Schedule ✓
Within Budget ✓
Total Project Budget: \$700K

Contract Value: \$548K
Total Expended to Date: \$550K



Orangeview JHS Site Improvements Project

COMPLETED



Within Budget ✓
Total Project Budget: \$12.35M

Original Contract Value: \$9.7M
Final Contract Value: \$9.4M

Total Expended to Date: \$8.3M

Western HS Site Improvement Project – Phase 1

Within Budget ✓
Total Project Budget: \$12.35M

Contract Value: \$9.7M
Total Expended to Date: \$5.2M



Our Measure H Journey



Over **32** projects completed
Total Construction Value of **\$253M**

Partially or fully funded by 'H'

ANAHEIM HS SECURITY FENCING

Substantial Completion: December 2019

Original Contract Amount: \$239,000

Final Contract Amount: \$239,000

Project Savings: \$0

ANAHEIM HS TRACK & FIELD

Substantial Completion: December 2023

Original Contract Amount: \$7,650,948

Final Contract Amount: \$7,696,585

Project Overrun: (\$45,637)

BALL JHS SITE IMPROVEMENT – PHASE 1

Substantial Completion: November 2019

Original Contract Amount: \$1,207,186

Final Contract Amount: \$1,162,081

Project Savings: \$45,104



Ball JHS Site Improvement Project – Phase 2

BALL JHS SITE IMPROVEMENT – PHASE 2

Substantial Completion: January 2022

Original Contract Amount: \$8,975,000

Final Contract Amount: \$8,715,975

Project Savings: \$259,025

BROOKHURST JHS TENNIS COURTS

Substantial Completion: June 2018

Original Contract Amount: \$141,990

Final Contract Amount: \$135,702

Project Savings: \$6,288

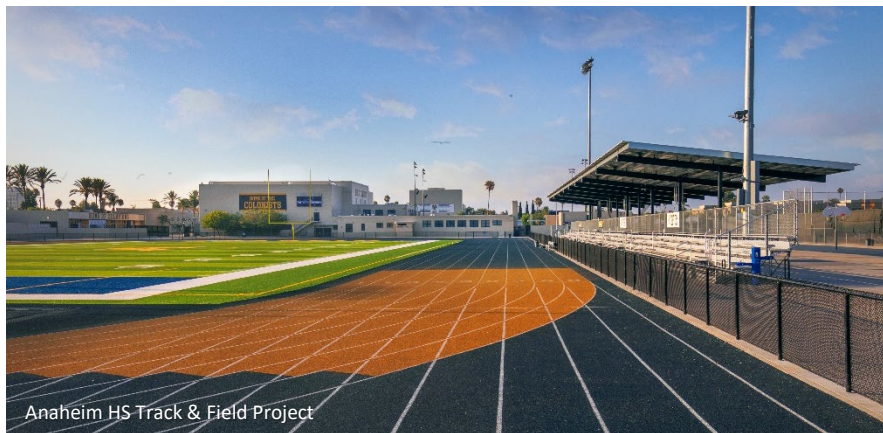
BROOKHURST JHS SECURITY FENCING

Substantial Completion: June 2018

Original Contract Amount: \$673,507

Final Contract Amount: \$718,507

Project Overrun: (\$45,000)



Anaheim HS Track & Field Project

CYPRESS HS SITE IMPROVEMENT

Substantial Completion: April 2019
Original Contract Amount: \$10,895,489
Final Contract Amount: \$9,424,780
Project Savings: \$1,470,709

DALE JHS INTERIM HOUSING

Substantial Completion: July 2018
Original Contract Amount: \$1,914,899
Final Contract Amount: \$1,868,497
Project Savings: \$46,402

DALE JHS MODERNIZATION, NEW CONSTRUCTION & POLARIS

Substantial Completion: September 2021
Original Contract Amount: \$45,799,000
Final Contract Amount: \$45,257,909
Project Overrun: \$541,091



Dale JHS Modernization & New Construction Project



Cypress HS Site Improvement Project

DISTRICT OFFICE ROOFING

Substantial Completion: November 2019
Original Contract Amount: \$2,375,178
Final Contract Amount: \$2,355,178
Project Savings: \$19,822

KATELLA HS DROPS SITE IMPROVEMENT

Substantial Completion: May 2017
Original Contract Amount: \$11,368,000
Final Contract Amount: \$10,917,373
Project Savings: \$450,626

KATELLA HS POOL RENOVATION

Substantial Completion: January 2025
Original Contract Amount: \$5,467,797
Final Contract Amount: \$5,830,098
Project Overrun: (\$362,301)

KENNEDY HS PARKING LOT & SITE IMPROVEMENT

Substantial Completion: May 2019
Original Contract Amount: \$6,378,773
Final Contract Amount: \$6,242,329
Project Savings: \$136,444

LOARA HS SECURITY FENCING

Substantial Completion: July 2018
Original Contract Amount: \$443,011
Final Contract Amount: \$440,042
Project Savings: \$2,969

MAGNOLIA HS SITE IMPROVEMENT

Occupancy: August 2021
Original Contract Amount: \$10,614,123
Final Contract Amount: \$9,816,720
Project Savings: \$797,403



Magnolia HS Pool Renovation Project



Magnolia HS Shower/Locker Room Project

MAGNOLIA HS SHOWER/LOCKER ROOM

Occupancy: August 2022
Original Contract Amount: \$4,844,123
Final Contract Amount: \$4,484,106
Project Savings: \$360,017

MAGNOLIA HS POOL RENOVATION

Substantial Completion: July 2023
Original Contract Amount: \$6,326,784
Final Contract Amount: \$6,434,492
Project Overrun: (\$107,708)

MAGNOLIA HS ART CLASSROOM & COURTYARD

Occupancy: May 2024
Original Contract Amount: \$2,852,851
Final Contract Amount: \$2,947,582
Project Overrun: (\$94,731)

MAGNOLIA HS NEW ADMINISTRATION & CYBERSECURITY BLDG.

Occupancy: July 2024

Original Contract Amount: \$38,300,000

Final Contract Amount: \$38,912,818.00

Project Overrun: (\$612,818)

MARQUEE PROJECTS AT VARIOUS SITES/DISTRICT OFFICE FENCING

Substantial Completion: August 2024

Original Contract Amount: \$4,851,439

Final Contract Amount: \$4,884,118

Project Overrun: (\$32,679)

OXFORD ACADEMY FENCING – NEW STUDENT DROP-OFF

Substantial Completion: August 2019

Original Contract Amount: \$73,455

Final Contract Amount: \$73,455

Project Savings: \$0



Magnolia HS Site Improvement Project

OXFORD ACADEMY NEW MUSIC BLDG. & ENGINEERING LABS

Substantial Completion: August 2019

Original Contract Amount: \$9,794,119

Final Contract Amount: \$9,354,282

Project Savings: \$439,837

Oxford Academy New Music Bldg. & Engineering Labs Project



ORANGEVIEW JHS SITE IMPROVEMENT

Substantial Completion: December 2024

Original Contract Amount: \$9,698,948

Final Contract Amount: \$9,412,903

Project Savings: 286,042

SAVANNA HS INTERIM LOCKER ROOMS

Substantial Completion: April 2019

Original Contract Amount: \$188,900

Final Contract Amount: \$166,231

Project Savings: \$22,669

SAVANNA HS MODERNIZATION & SITE IMPROVEMENT

Substantial Completion: January 2020
Original Contract Amount: \$21,186,771
Final Contract Amount: \$20,529,262
Project Savings: \$657,509

SYCAMORE JHS SECURITY FENCING – PHASE 1

Substantial Completion: May 2019
Original Contract Amount: \$382,763
Final Contract Amount: \$372,763
Project Savings: \$10,000

SYCAMORE JHS SITE IMPROVEMENT

Substantial Completion: May 2019
Original Contract Amount: \$382,763
Final Contract Amount: \$372,763
Project Savings: \$10,000

Savanna HS Site Improvement Project



Sycamore JHS Site Improvement Project

WESTERN HS PARKING LOT

Substantial Completion: June 2020
Original Contract Amount: \$2,580,000
Final Contract Amount: \$2,972,751
Project Overrun: (\$392,751)

WESTERN HS INCUBATOR LAB (i-LAB)

Substantial Completion: January 2021
Original Contract Amount: \$1,138,700
Final Contract Amount: \$1,123,858
Project Savings: \$14,842

WESTERN HS PRACTICE FIELD

Substantial Completion: June 2024
Original Contract Amount: \$11,415,455
Final Contract Amount: \$11,738,059
Project Overrun: (\$322,604)

VIDEO SURVEILLANCE SOLUTION DISTRICTWIDE (CAMERAS) - 3 PHASES

Substantial Completion: March 2021

Original Contract Amount: \$2,235,014

Final Contract Amount: \$2,454,878

Project Overrun: (\$219,864)

21ST CENTURY CLASSROOM FURNITURE

Substantial Completion: October 2022

Total classrooms upgraded: 625

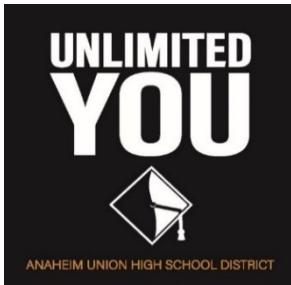
Total expended: \$10,262,279



21st Century Classroom Furniture

SCHOOL	2015-2022 INNOVATION CLASSROOMS
ANAHEIM HS	64
BALL JHS	21
BROOKHURST JHS	24
CYPRESS HS	50
DALE JHS	44
HOPE SCHOOL	14
KATELLA HS	49
KENNEDY HS	40
LEXINGTON JHS	24
LOARA HS	47
MAGNOLIA HS	36
ORANGEVIEW JHS	21
OXFORD ACADEMY	23
SAVANNA HS	38
SOUTH JHS	28
SYCAMORE JHS	27
TRIDENT/GILBERT HS	18
WALKER JHS	22
WESTERN HS	32
CAMBRIDGE VIRTUAL ACADEMY	3
TOTAL CLASSROOMS	625





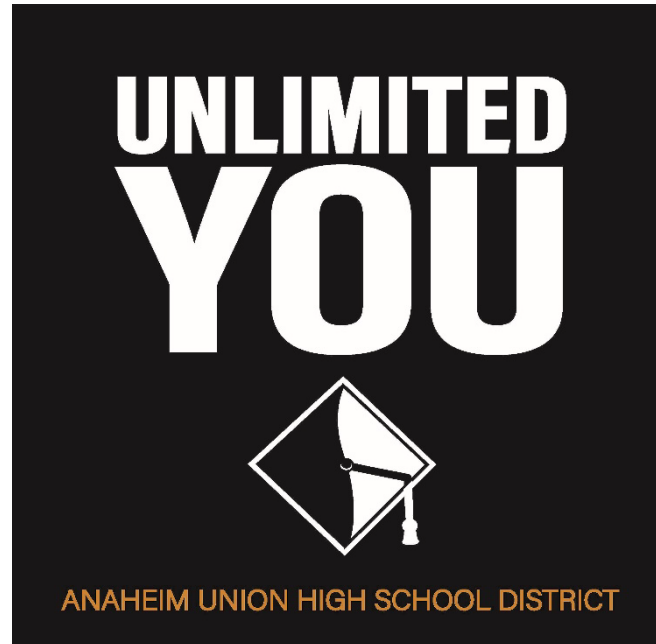
Annual Report

Conclusion

Based on the listed activities, the CBOC advises the public that the Anaheim Union High School District is in compliance with Education Code Sections 15100 *et seq.*, 15264 *et seq.*, Government Code Section 53506, and Article XIII A, Section 1(b)(3) of the California Constitution. Bond proceeds have been expended on projects set forth in the ballot measure. No bond proceeds have been used for teachers or administrative salaries or other school operating expenditures. Audits have been performed as prescribed by law.

Attachments

Meeting minutes, program reports, bylaws, audits, and additional Information can be found on the District's website: www.auhsdbblueprint.us (Citizens' Bond Oversight Committee tab).



Thank You!

Comments and Questions