CUPERTINO UNION SCHOOL DISTRICT

Measure Z Citizens' Bond Oversight Committee
Regular Meeting

03/18/2026 - 07:00 PM
CUSD Administrative Office, Big Conference Room
1309 S. Mary Avenue, Suite 150, Sunnyvale, CA

MEETING MINUTES

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A. CALL TO ORDER

Meeting Called to Order at 7.03 PM.
Chair Sanjay Tandon introduced members Peter Huang and Nicolas Marcott:

- Peter Huang - parent of a first and fifth-grader at Blue Hills Elementary, joined the committee to learn more about its work and contribute to the school community.
- Nicolas Marcott - parent of a kindergartner and second-grader at Sedgwick, and is excited to join the committee.

1. Roll Call

Staff conducted Roll Call to establish Quorum:

- Chair Sanjay Tandon - present
- Vice Chair Ramon Juraboev - present
- Committee Member Bhavani Shankar Garikapati - present
- Committee Member Christina Chu - present
- Committee Member Deb Stoddard - present
- Committee Member Maribel Wallace - present
- Committee Member Mariia Tkachenko - absent
- Committee Member Mark Burns - present
- Committee Member Nicholas Marcott - present
- Committee Member Peter Huang - present
- Committee Member Santosh Rao - present

Staff Present:

- Todd Shimada, Bond Program Administrator, CUSD
- Kavitha Lakshmanan, Administrative Secretary to CBO, CUSD
- Jeff Scogin, Ann Kennedy Group
- Tony Kanastab, Project Director, Brailsford & Dunlavey
- Mark Newton, Bond Program Manager, Brailsford & Dunlavey
- Travis Kirk, TBK Construction Management Corp

B. OPENING ITEMS

1. Approval of the March 18, 2026 Meeting Agenda

Motion: Approve the March 18, 2026 Measure Z CBOC regular meeting agenda.
Motion made by: Santosh Rao
Motion seconded by: Peter Huang
Voting:

Bhavani Shankar Garikapati - Yes
Christina Chu - Yes
Deb Stoddard - Yes
Maribel Wallace - Yes
Mark Burns - Yes
Nicolas Marcott - Yes
Peter Huang - Yes
Ramon Juraboev - Yes
Santosh Rao- Yes
Sanjay Tandon — Yes

Motion passes

2. Approval of the January 21, 2026 Regular Meeting Minutes

Motion: Approve the Jan 21, 2026 Measure Z CBOC regular meeting minutes.
Motion made by: Mark Burns
Motion seconded by: Ramon Juraboev
Voting:

Bhavani Shankar Garikapati - Yes
Christina Chu - Yes
Deb Stoddard - abstain
Maribel Wallace - Yes

Mark Burns - Yes
Nicolas Marcott - abstain
Peter Huang - abstain
Ramon Juraboev - Yes
Santosh Rao- Yes
Sanjay Tandon — Yes

Motion passes

C. PUBLIC COMMENT

No Comments

D. INFORMATION/DISCUSSION

1. Bond Program Update

Todd Shimada, Bond Program Administrator, provided an update on the Bond Program projects.

- A draft of the Master Project List is expected by the end of this week. It will be reviewed by the Facilities Committee before moving to the Board as an information item, followed by a formal action item.
- TK/Kinder Playground Replacement: Scheduled for Summer (June 8 – August 7) at Eisenhower, Stevens Creek, Stocklmeir, and West Valley. Contracts are currently being executed.
- Paving Projects: Planned for Lincoln, Montclaire, and West Valley. Bids are due March 31, with construction set for June 8 – August 2.
- HVAC & Roofing: A bundled package for Eisenhower and Garden Gate.
- Modernization: Stocklmeir TK restroom modernization and roofing/HVAC. CUSD staff has recommended Blach Construction as the general contractor; Board approval is pending for April 9 or sooner.

Member Questions: Todd Shimada, Travis Kirk, Jeff Scogin, and Tony Kanastab responded to member questions

- Regarding Paving Projects, does this refer to roads or something else?
  - A: These are predominantly playground surfaces. Many current surfaces are bumpy and have required repair for some time; bond funds are now making these repairs possible.
- Do these projects need city approval or does CUSD have independent jurisdiction?
  - CUSD has independent jurisdiction via the DSA. Local cities only become involved if a project requires an encroachment permit (e.g., changing a driveway that touches city property). Projects fall under the Division of the State Architect (DSA), not local city jurisdiction. DSA reviews three primary areas: Access Compliance, Fire/Life Safety, and Structural Integrity. CUSD hires an independent Project Inspector certified by the DSA to ensure all work matches approved plans and specs.
- Does the state code reflect the new high-risk Fire Hazard Severity Zones (Red/Orange zones)?
  - Yes. The DSA mandates a Fire/Life Safety review. Any state policy or code changes regarding fire safety must be addressed in the project designs. The California Building Code is updated every three years. All current projects must adhere to the most recent standards (including 2025 updates).
- Is there a cost difference for materials (like Class A fire-retardant roofs) in these high-hazard zones?
  - Code changes—whether for fire alarms or roofing materials—can lead to potential cost differences which the district is required to meet.
- Is there a requirement for centralized fire sprinklers in these projects?
  - It depends on the scope. For example, replacing a roof alone doesn't usually trigger a sprinkler requirement, but a major remodel (often exceeding 50% of the structure's value) may trigger seismic or fire safety upgrades. Architects and the DSA monitor these triggers.
- Are the middle school fields being worked on this summer?
  - Not yet. Track and field projects are slated for the next few years as part of the larger Master Project List awaiting full Board approval.
- Who maintains the playgrounds—the City or the District?
  - While some fields have joint-use agreements where the City of Cupertino or City of Sunnyvale handles maintenance, the playgrounds are managed and maintained by District staff.

2. Review of 2025-26 FY Q2 Financials

Jeff Scogin, Ann Kennedy Group, provided an overview of the 2025-26 FY Q2 Financials

- Reporting Period: Quarter 2 (October 1 – December 31) of the fiscal year.
- The report tracks project numbers, names, board-approved budgets, and expenditures from inception to date.
- Column C specifically highlights financial activity since the last committee meeting.
- Percent Complete Financials: A calculation of expenditures divided by the budget.
- Percent Complete Construction: A status provided by the project management teams reflecting physical work on-site.
- Staff noted a typical three-month lag between work performed and the final financial processing (invoices, approvals, and checks cut).

Project Expense Detail Report

- In response to previous requests, the committee reviewed a granular detail report. For example, the DeVargas TK Playground project showed $174,000 in spend for Q2, which the detail report linked to specific Purchase Orders (POs).
- The data pulls from the district's ERP system (Frontline/Escape) and syncs nightly with project management tools.
- A 5% retention is held on public works projects for 60 days after the Notice of Completion to protect against liens or stop notices.
- The district-wide solar array project concluded in January 2026. These are revenue-generating assets for the General Fund.
    - Payments to Bank of America reflect a lease-purchase debt service for the solar project, as permitted by the ballot language.
- Significant Q2 spend was noted on staff security badges/alert devices. These devices allow staff to alert the office or law enforcement (used successfully during a previous intruder incident).

Member Questions: Todd Shimada, Travis Kirk, Jeff Scogin, and Tony Kanastab responded to member questions

- If a project shows 87% financial completion but 100% construction completion, where does the remaining 13% go?
    - It remains in the program fund. The difference usually accounts for a lag in invoicing or the 5% retention held until the 60-day post-construction period expires.
- Why does the security fencing project show a negative expenditure (-2%)?
    - This reflects a credit received and coded against the project. Staff will verify if this credit should have been applied to a prior project and correct the coding if necessary.
- Can we change "Percentage Complete Construction" to "Percentage Complete Implementation" for non-construction items like technology?
    - Yes. The committee agreed to update the terminology so it is consistent for both physical builds and software/hardware rollouts.
- How do we verify that a specific high-cost item (e.g., a $1M technology spend) is in compliance with the ballot measure?
    - Compliance is verified through three layers:
        - Board Approval: Every PO is published in SIMBLI and ratified monthly.
        - Audit: External auditors review expenditures against ballot language (Measure Z).
        - Committee Oversight: Members can request to see specific invoices or perform site tours to verify work exists.
- Do interest earnings from the bond (e.g., the $919k balance) go back into the bond fund or the general fund?
    - Interest earned on bond proceeds stays within the bond fund to be used for approved projects. However, revenue generated by solar production goes to the General Fund.

E. INFORMATION

1. Member Questions/Comments

Member questions and comments:

- Member raised a point regarding the committee's duty—as outlined in the bylaws—to review the district's "deferred maintenance plans."
    - District staff confirmed that there is currently no formal deferred maintenance plan in place for the committee to review.
    - Staff explained that several years ago, the State of California discontinued the specific allocation of funds to school districts for deferred maintenance. Consequently, the burden for major repairs and long-term facility upkeep shifted from a state-funded maintenance plan to local bond programs.
    - While the board has the option to allocate general funds for maintenance, they have not established a separate plan for the committee to review at this time.
- Members engaged in a debate regarding the scope of their responsibilities based on the bylaws
    - It was noted that the bylaws mandate the committee to review district efforts to maximize bond proceeds through cost-saving measures. This includes revenue-generating projects like solar arrays. There was a disagreement regarding how deep the committee should dive into project details. Some members felt that detailed project management (specific vendor choices or minute design details) is the role of the CUSD Board and staff, and the committee should focus on ballot compliance. Other members felt that the bylaws grant the right to scrutinize expenditures more closely to ensure efficiency and savings, asserting this is not overstepping but fulfilling their legal function.
- Member asked what would be efficient for deep dives into project expenses.
    - To balance thorough oversight with respect for everyone's time, the following protocol was suggested:
        - If a committee member wishes to perform a "deep dive" into a specific project or expenditure, they should request it as a future agenda item.
        - This allows district staff sufficient time to gather research, invoices, or technical data to present a complete picture at the next meeting.
- Member expressed concern about meeting length and that the meeting felt rushed.
    - While the committee aims for a one-hour window (7:00–8:00 p.m.) to respect everyone's schedule, the bylaws do not mandate a hard adjournment time. The priority remains thoroughness and transparency over speed.

2. Follow Up Items

The materials provided in the follow-up items were appreciated by the committee.

F. AGENDA SETTING/FUTURE MEETINGS

Future Agenda Items & Requests

- The committee discussed moving the next meeting date to ensure a quorum of six members, as several members will be out of town on the original June 10th date. Attendance reminder that attendance at the meetings is critical to maintain active status on the committee.
    - Motion: Approve to move the next meeting date to Jun 3, 2026

Motion made by: Maribel Wallace
Motion seconded by: Nicolas Marcott
Voting:

Bhavani Shankar Garikapati - Yes
Christina Chu - Yes
Deb Stoddard - Yes
Maribel Wallace - Yes
Mark Burns - Yes
Nicolas Marcott - Yes
Peter Huang - Yes
Ramon Juraboev - Yes
Santosh Rao- Yes
Sanjay Tandon — Yes

Motion passes

- Technology Master Plan Deep-Dive: Request for the Chief Technology Office to present a detailed rollout plan and progress report for technology infrastructure.
- Financial Reporting Cleanup: Remove "Construction" from the percentage column for non-building projects.
- Flag any payment delays exceeding 30 days as exceptions to monitor for potential legal issues.
- Follow-up requested regarding the permissibility of paying interest on the solar lease-purchase agreement from bond funds.
- Staff to provide an update on the Master Project List where budgets need to be increased based on recent bid results (e.g., the Miller Middle School roofing project which encountered unforeseen conditions).
- The committee discussed the possibility of conducting site tours to see "before and after" progress of bond-funded projects. June and September are ideal for tours due to late-evening daylight. A proposed tour-then-meet format was discussed, where the committee would meet at a specific school site (e.g., Kennedy or Blue Hills) at 6:00 p.m. for a walkthrough, followed by the formal meeting at 7:00 p.m. While a tour on June 3rd was discussed, the lack of visible construction progress by that date was noted. Tours may be more impactful once major projects (like gyms or modernizations) are further along.

G. ADJOURNMENT

Motion: Adjourn the March 18, 2026 Measure Z regular meeting
Motion made by: Mark Burns
Motion seconded by: Marbel Wallace
Voting:

Bhavani Shankar Garikapati - Yes
Christina Chu - Yes
Deb Stoddard - Yes
Maribel Wallace - Yes
Mark Burns - Yes
Nicolas Marcott - Yes
Peter Huang - Yes
Ramon Juraboev - Yes
Santosh Rao- Yes
Sanjay Tandon — Yes

Motion passes
Meeting adjourned at 8:34 PM.