

## Regular Board Meeting

Thursday, April 13, 2023 7:00 PM

Umatilla School District, 1001 6th St, Umatilla, OR 97882

### A. **Call Meeting to Order**

### B. **Public Input**

### C. **Presentations**

C.1. Superintendents Advisory

### D. **Approve Agenda**

### E. **Action Items**

E.1. Consent Agenda: Minutes for the March Board of Directors Workshop, March Regular Board Meeting, March Special Board Meeting, HR Report, Disbursements and Financial Statements

E.2. Recommend Alliance for Project Manager

### F. **Discussions**

F.1. Bridge Builder Awards

F.2. Crystal Apple

F.3. Bond Sale Update

### G. **Other/Board Discussions**

### H. **Staff Recognition**

### I. **Reports**

I.1. McNary Heights Elementary School - Nicole Coyle, Tim Young, Taunya Daniel

I.2. Clara Brownell Middle School - Rick Cotterell, Anthony Brown

I.3. Umatilla High School - Bob Lorence, April Dirksen, Scott Bow

I.4. Maintenance - Vincent Stefani

I.5. District - Heidi Sipe, Stephanie Williams-Strege, Kim Gilsdorf, David Lougee, Julie Hunt, Rikkilynn Starliper, Maria Sanchez, Pat Kerrigan

I.6. IMESD Talking Points

### J. **Public Input**

### K. **Adjourn**

# Umatilla School District 6

Code: BDDH  
Adopted: 10/11/95  
Revised/Readopted: 2/11/04; 3/10/22  
Orig. Code: BDDH

## Public Comment at Board Meetings

All Board meetings, with the exception of executive sessions, will be open to the public. The Board invites the district's community members to attend Board meetings to become acquainted with the program and operation of the district. The public has a right to attend public meetings held in open session, and may be invited to share comments, ideas and opinions with the Board during designated times on the agenda. The Board may conduct a meeting without public comment.

Individuals with hearing, vision or speech impairments will be given an equal opportunity to participate in Board meetings and submit written comments to the Board. Individuals requesting assistance, aids or accommodations are encouraged to notify the district at least 48 hours prior to the Board meeting with the request, consistent with Board policy BD/BDA – Board Meetings.

### Procedures for Oral Public Comment

The Board establishes the following procedures for public comment at Board meetings held in open session. The information will be accessible and available to all patrons accessing or attending such a Board meeting.

1. Public comment is limited to its designated place on the agenda and while time allows.
2. A person wishing to provide public comment, if an opportunity is provided by the Board during a meeting open to the public, will complete and submit the Intent to Speak card to the Board secretary prior to the Board meeting.<sup>1</sup> A request to give public comment in-person or electronically does not guarantee time will be available.
3. A person speaking during the public comment portion of the meeting may comment only on agenda items.
4. A person speaking during the public comment portion of the meeting should state their name, whether they are a resident of the district, and, if speaking for an organization, the name of the organization. A spokesperson should be designated to represent a group with a common purpose.
5. A person giving public comment is limited to an established time limit of three minutes. Statements should be brief and concise. If a person has more comments than time allows or is unable to comment due to time constraints, the person is encouraged to submit additional written comments to the Board through the district office as directed.

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<sup>1</sup> When in-person attendees are allowed to provide oral comment, virtual attendees will be afforded the same opportunity.

- Inquiries from the public during the designated portion of the agenda will not generally be responded to immediately by the Board chair, and may be referred to the superintendent for reply at a later date. The Board will not respond to inquiries that are expected to be addressed during another designated portion of the agenda.

The Board will not hear public comment at Board work sessions.

### **Procedures for Written Comment**

Members of the public may submit written comments or materials to the Board at any time at the district office, by mail or by email to [help@umatillasd.org](mailto:help@umatillasd.org). Materials or comments submitted at least 72 hours in advance of a Board meeting will be provided to the Board before the Board meeting, but will not be read at the Board meeting. Written materials or comments submitted may not warrant action by the Board.

### **Comments Regarding Staff Members**

A person speaking during the designated portion of the agenda for public comment may offer objective criticism of district operations and programs. The Board will not hear comments regarding any individual district staff member. The Board chair will direct the visitor to the procedures in Board policy KL - Public Complaints for consideration of a legitimate complaint involving a staff member. Any association contract governing the employee's rights will be followed. A commendation involving a staff member should be sent to the superintendent.

END OF POLICY

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#### **Legal Reference(s):**

[ORS 165.535](#)  
[ORS 165.540](#)

[ORS 192.610 - 192.690](#)  
[ORS 332.057](#)

[ORS 332.107](#)

Americans with Disabilities Act of 1990, 42 U.S.C. §§ 12101-12213 (2018); 29 C.F.R. Part 1630 (2020); 28 C.F.R. Part 35 (2020).  
Americans with Disabilities Act Amendments Act of 2008, 42 U.S.C. §§ 12101-12133 (2018).  
*Baca v. Moreno Valley Unified Sch. Dist.*, 936 F. Supp. 719 (C.D. Cal. 1996).  
*Leventhal v. Vista Unified Sch. Dist.*, 973 F. Supp. 951 (S.D. Cal. 1997).  
Oregon House Bill 2560 (2021).

#### **Cross Reference(s):**

BDDC - Board Meeting Agenda  
KC - Community Involvement in Decision Making



# UMATILLA SCHOOL DISTRICT

2022-23 SCHOOL YEAR

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# TRANSPORTATION PLAN 2022-23

- New Midco leadership team
  - Full compliment of drivers
  - Safe reliable transportation
  - Fluent communication
  - True partnership
  - Customer survey
-

**MID-COLUMBIA  
LEADERSHIP TEAM**

# UPPER LEADERSHIP TEAM

❖ **Michelle Taber**

Regional Vice President

❖ **Brian Johnson**

Regional Director of Operations

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# LOCAL LEADERSHIP TEAM

❖ **Christie Livingston**

Location Manager

❖ **Pamela Low**

Dispatcher

❖ **Caitlyn Dunn**

Dispatcher

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# EXPERIENCED MAINTENANCE TEAM

- ❖ **Billy Carrol**

Lead Technician – 1 year with Midco

- ❖ **Josh Ruiz-Burleson**

Technician – 5 years with Midco

**FLEET  
MAINTENANCE**

- All preventive maintenance and annual inspections are tracked and are current in Umatilla.
- Preventative Maintenance inspections are required every 90 days.
- Annual inspections are required annually.

## **FLEET MAINTENANCE**

- Midco has piloted MTC Pro system which tracks maintenance inspections, maintenance request, work orders, parts inventory, etc. and will be implementing in all locations over the next couple months.
- Midco is encouraging all technician to become ASE certified by successfully passing S1-S7 of the ASE test series.
- To promote success in this program Midco is offering technician a \$.25 wage increase per certification, totalling \$1.75 per hour after successfully completing all 7 tests.

## **FLEET MAINTENANCE**

## **RECRUITING EFFORTS**

- Grassroot recruiting
- Banners
- Social media
- Job fairs
- Indeed
- Craigslist
- Unemployment office (weekly)
- Radio ads
- Calling past employees
- Hiring texts via mass communication systems
- Job boards
- Referral bonuses

**TYLER BOTTS,**  
**REGIONAL**  
**RECRUITER LEADS**  
**OUR RECRUITING**  
**EFFORTS.**

# UMATILLA DRIVERS

❖ **Shannon Mott – Mustang**  
(2 Years with Midco)

❖ **Danielle Collins – Roadrunner**  
(1 Year with Midco)

❖ **Marcee Moore – Sandrat**  
(5 years with Midco)

❖ **Paul Carlson - Sidewinder**  
(15 Years with Midco)

❖ **Paul Tricker – Rugrats**  
(12 years with Midco)

❖ **Debra Ledford – E-10**  
(4 years with Midco)

❖ **Jason Epperson – Viking**  
(13 Years with Midco)

❖ **Brittany Gibson – Taz**  
(1 year with Midco)

**FULL COMPLIMENT OF DRIVERS WITH AN  
AVERAGE TENURE OF 6.6 YEARS OF SERVICE**

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**CUSTOMER  
SERVICE**

# CUSTOMER SERVICE

- Christie has established increased communication with Heidi Sipe
  - Brian and Michelle check in regularly to ensure satisfaction
  - Started the year with a driver for every route
  - Proactive communication
  - Processes in place for planning ahead as much as possible
-

Please rate your experience

*Outstanding*

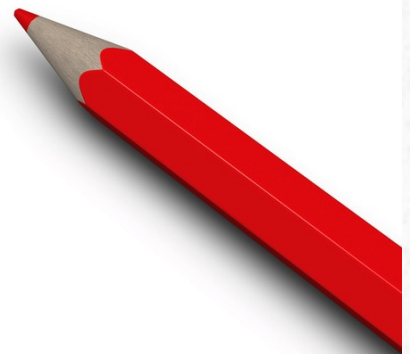
Excellent

Very good

Good

Average

Poor



## CUSTOMER SURVEY

# CUSTOMER SURVEY

- We want your feedback.
  - Corporate Surveys are sent out annually.
    - Scores are rated 1-10. 10 representing great service.
    - If you would rate our service lower than a 10 in any category, we need to create an action plan to improve.
  - Regional Level Service Surveys are sent out Monthly to Administration staff.
-

# **FOCUSED IMPROVEMENTS FOR 2022-23 BASED ON 2022 SURVEY RESULTS**

## **Communication**

- Establish regular communication
  - Weekly customer progress reports provided to Hiedi
  - Processes in place for proactive planning and communication
  - Issues addressed within 24 hours
-

# FOCUSED IMPROVEMENTS FOR 2022-23 BASED ON 2022 SURVEY RESULTS CONT'D

## Service

- Obtain adequate work force
    - Starting the school year fully staffed
    - Continuous recruiting efforts
  - Provide safe on-time service
  - Meet District's service needs
-

# FOCUSED IMPROVEMENTS FOR 2022-23 BASED ON 2022 SURVEY RESULTS CONT'D

## Safety

- Continuous driver/attendant training
    - Conducted 4-hour in-service on managing student behavior
  - Well maintained buses
  - Monthly safety meetings
-

Please rate your experience

*Outstanding*

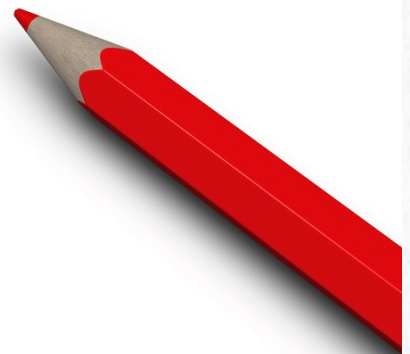
Excellent

Very good

Good

Average

Poor



## PARENT SURVEY

## PARENT SURVEY

- An end of the year survey will be sent out in May to ensure our scores are showing improvement.
  - Very little participation from Umatilla Parents for the first half of the school of the school year, but with the districts help we strive for better results for the end of the year survey.
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**WE SUPPORT OUR COMMUNITY**



**COMMUNITY  
ENGAGEMENT**



## UMATILLA CLEAN THE COAST DAY

Mid-Columbia Driver assist  
Umatilla Clean the coast day



## MIDCO STUFF THE BUS

Umatilla robotics team helps  
unload food for the Stuff the Bus  
food drive



**THANK YOU  
FOR YOUR PARTNERSHIP**

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Board of Directors Workshop  
Thursday, March 9, 2023 6:00 PM Pacific

Umatilla School District  
1001 6th St  
Umatilla, OR 97882

Josiah Barron: Present  
Lesly Claustro-Sanguino: Present  
Toby Cranston: Present  
Travis Eynon: Present  
Veronica Gutierrez: Present  
Jon Lorence: Present  
Jorge Meza: Absent  
Present: 6, Absent: 1.

A. Call Meeting to Order

The meeting was called to order by Jon Lorence at 6:08pm.

B. Executive Session per ORS 192.660 (2)(i) - To review and evaluate the performance of the superintendent.

C. Open Session

D. Adjourn

The meeting was adjourned at 7:02pm.

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Board Chair

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Superintendent

#### A. Call Meeting to Order

Jon Lorence called the meeting to order at approximately 7:06pm and then led the recitation of the Pledge of Allegiance.

#### B. Public Input

#### C. Presentations

##### C.1. Superintendents Advisory

Sophia Aufdermauer represented Superintendents Advisory and their approval of tonight's agenda items.

#### D. Approve Agenda

Motion to approve agenda as presented. This motion, made by Travis Eynon and seconded by Toby Cranston, Carried.

Josiah Barron: Yea, Lesly Claustro-Sanguino: Yea, Toby Cranston: Yea, Travis Eynon: Yea, Veronica Gutierrez: Yea, Jon Lorence: Yea, Jorge Meza: Yea  
Yea: 7, Nay: 0

#### E. Action Items

##### E.1. Consent Agenda: Minutes for February Board Meeting, HR Report, Disbursements and Financial Statements

Motion to approve consent agenda as presented. This motion, made by Toby Cranston and seconded by Lesly Claustro-Sanguino, Carried.

Josiah Barron: Yea, Lesly Claustro-Sanguino: Yea, Toby Cranston: Yea, Travis Eynon: Yea, Veronica Gutierrez: Yea, Jon Lorence: Yea, Jorge Meza: Yea  
Yea: 7, Nay: 0

##### E.2. Approve Supplemental Budget Resolution #23-06

Motion to approve Supplemental Budget Resolution #23-06. This motion, made by Josiah Barron and seconded by Lesly Claustro-Sanguino, Carried.

Josiah Barron: Yea, Lesly Claustro-Sanguino: Yea, Toby Cranston: Yea, Travis Eynon: Yea, Veronica Gutierrez: Yea, Jon Lorence: Yea, Jorge Meza: Yea  
Yea: 7, Nay: 0

##### E.3. Approve Superintendent Renewal and Contract

Motion to approve superintendent renewal and contract. This motion, made by Travis Eynon and seconded by Lesly Claustro-Sanguino, Carried.

Josiah Barron: Yea, Lesly Claustro-Sanguino: Yea, Toby Cranston: Yea, Travis Eynon: Yea, Veronica Gutierrez: Yea, Jon Lorence: Yea, Jorge Meza: Yea  
Yea: 7, Nay: 0

E.4. Approve Licensed Administration, Non Licensed Administration/Supervisory and Confidential Renewal List for 2023-2024 School Year

Motion to approve Licensed Administration, Non Licensed Administration/Supervisory and Confidential Renewal List for 2023-2024 School Year. This motion, made by Lesly Claustro-Sanguino and seconded by Toby Cranston, Carried.

Jon Lorence: Abstain (Without Conflict), Josiah Barron: Yea, Lesly Claustro-Sanguino: Yea, Toby Cranston: Yea, Travis Eynon: Yea, Veronica Gutierrez: Yea, Jorge Meza: Yea  
Yea: 6, Nay: 0, Abstain (Without Conflict): 1

E.5. Approve Licensed Employee Renewal List for 2023-2024 School Year

Motion to approve Licensed Employee Renewal List for 2023-2024 School Year. This motion, made by Lesly Claustro-Sanguino and seconded by Veronica Gutierrez, Carried.

Jon Lorence: Abstain (Without Conflict), Josiah Barron: Yea, Lesly Claustro-Sanguino: Yea, Toby Cranston: Yea, Travis Eynon: Yea, Veronica Gutierrez: Yea, Jorge Meza: Yea  
Yea: 6, Nay: 0, Abstain (Without Conflict): 1

E.6. Approve Classified Employee Renewal List for 2023-2024 School Year

Motion to approve Classified Employee Renewal List for 2023-2024 School Year. This motion, made by Lesly Claustro-Sanguino and seconded by Josiah Barron, Carried.

Travis Eynon: Abstain (Without Conflict), Josiah Barron: Yea, Lesly Claustro-Sanguino: Yea, Toby Cranston: Yea, Veronica Gutierrez: Yea, Jon Lorence: Yea, Jorge Meza: Yea  
Yea: 6, Nay: 0, Abstain (Without Conflict): 1

E.7. Approve Integrated SIA Guidance

Motion to approve integrated SIA guidance. This motion, made by Toby Cranston and seconded by Lesly Claustro-Sanguino, Carried.

Josiah Barron: Yea, Lesly Claustro-Sanguino: Yea, Toby Cranston: Yea, Travis Eynon: Yea, Veronica Gutierrez: Yea, Jon Lorence: Yea, Jorge Meza: Yea  
Yea: 7, Nay: 0

Heidi: It is available online for the public to view and ready for submission.

E.8. Approve Snow Day Makeup Days

Motion to approve snow day makeup days. This motion, made by Travis Eynon and seconded by Lesly Claustro-Sanguino, Carried.

Josiah Barron: Yea, Lesly Claustro-Sanguino: Yea, Toby Cranston: Yea, Travis Eynon: Yea, Veronica Gutierrez: Yea, Jon Lorence: Yea, Jorge Meza: Yea  
Yea: 7, Nay: 0

Heidi: Last staff day will have some flexibility if necessary.

E.9. Approve 2023-2024 School Calendar

Motion to approve 2023-2024 school calendar. This motion, made by Travis Eynon and seconded by Lesly Claustro-Sanguino, Carried.

Josiah Barron: Yea, Lesly Claustro-Sanguino: Yea, Toby Cranston: Yea, Travis Eynon: Yea, Veronica Gutierrez: Yea, Jon Lorence: Yea, Jorge Meza: Yea  
Yea: 7, Nay: 0

Discussed concerns with Rock the Locks event that happens October 6th, 2023. Potential for traffic issues and err on the side of caution. Switch the last day of school to June 6th as a half day and cancel October 6th.

#### E.10. Approve ASC Contract Revisions 2023-2024

Motion to approve ASC contract revisions 2023-2024. This motion, made by Josiah Barron and seconded by Lesly Claustro-Sanguino, Carried.

Josiah Barron: Yea, Lesly Claustro-Sanguino: Yea, Toby Cranston: Yea, Travis Eynon: Yea, Veronica Gutierrez: Yea, Jon Lorence: Yea, Jorge Meza: Yea  
Yea: 7, Nay: 0

#### E.11. Approve Surplus

Motion to approve surplus. This motion, made by Travis Eynon and seconded by Veronica Gutierrez, Carried.

Josiah Barron: Yea, Lesly Claustro-Sanguino: Yea, Toby Cranston: Yea, Travis Eynon: Yea, Veronica Gutierrez: Yea, Jon Lorence: Yea, Jorge Meza: Yea  
Yea: 7, Nay: 0

### F. Discussions

#### G. Other/Board Discussions

#### H. Staff Recognition

Mr. Caldwell, Bob, Lourdes, Coach Bow, the UHS Basketball Coaches and Team, Delma, Julie, Caitlin, Chevelle, Teena, Jeff, Vall and Team, Morrow County School District, Coach Thomson, Chuchy Sanchez, Adriana Vargas, Tricia Lorence, Monica Torres-Ascencio, Erica Martinez, Ariel Clark, Maria Daniel, Miriam Ruiz, Amanda Kendrick, Ashlee White, Alejandra and Jorge Meza, Nanci Islas, Susie Sotelo.

#### I. Reports

##### I.1. McNary Heights Elementary School – Nicole Coyle, Tim Young, Taunya Daniel

Tim: So thankful to have all the classified staff that we do at McNary.

##### I.2. Clara Brownell Middle School – Rick Cotterell, Anthony Brown

Rick: We really appreciate our classified staff.

Anthony: Track has started strong.

##### I.3. Umatilla High School – Bob Lorence, April Dirksen, Scott Bow

Bob: Fun to go out to the greenhouse and see what they're up to. Working with a lens from Germany that takes a picture of the leaf to tell the farmer what the plant needs. A state of the art irrigation system will be installed for free.

Scott: All sports going right now, 140 kids in spring sports.

##### I.4. Maintenance - Vinny Stefani

##### I.5. District – Heidi Sipe, Stephanie Williams-Strege, Kim Gilsdorf, David Lougee, Julie Hunt, Rikkilynn Starliper, Maria Sanchez, Pat Kerrigan

Stephanie: Author coming next Friday to present to our students. Tina and Stephanie presenting at the National After School Conference.

Maria: Thank you for your support. Trying to figure out what to do to celebrate the people in our district.

Heidi: Shoutout to Midco and Travis, good partnership effort to ensure the police dept has access to videos from MidCo. Kristy was able to schedule busses for robotics last minute.

I.6. IMESD Talking Points

J. Public Input

None.

K. Adjourn

Meeting adjourned at 7:46pm.

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Board Chair

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Superintendent

Special Board Meeting - Call  
Thursday, March 23, 2023 7:00 PM Pacific

Umatilla School District  
1001 6th St  
Umatilla, OR 97882

Josiah Barron: Present  
Lesly Claustro-Sanguino: Present  
Toby Cranston: Absent  
Travis Eynon: Present  
Veronica Gutierrez: Present  
Jon Lorence: Present  
Jorge Meza: Present  
Present: 6, Absent: 1.

#### A. Call Meeting to Order

The meeting was called to order by Jon Lorence at 7:08.

#### B. Approve Agenda

Motion to approve agenda. This motion, made by Travis Eynon and seconded by Veronica Gutierrez, Carried.

Toby Cranston: Absent, Josiah Barron: Yea, Lesly Claustro-Sanguino: Yea, Travis Eynon: Yea, Veronica Gutierrez: Yea, Jon Lorence: Yea, Jorge Meza: Yea  
Yea: 6, Nay: 0, Absent: 1

#### C. Agenda Items

##### C.1. Approve revision to Resolution 23-03.

Motion to approve a revision of resolution 23-03. This motion, made by Travis Eynon and seconded by Veronica Gutierrez, Carried.

Toby Cranston: Absent, Josiah Barron: Yea, Lesly Claustro-Sanguino: Yea, Travis Eynon: Yea, Veronica Gutierrez: Yea, Jon Lorence: Yea, Jorge Meza: Yea  
Yea: 6, Nay: 0, Absent: 1

##### C.2. Approve Banlin Construction with Hermiston Home Center for completion of Alt Ed/Daycare Building.

Motion to approve Banlin Construction with Hermiston Home Center for completion of the Alt Ed/Daycare Building. This motion, made by Travis Eynon and seconded by Lesly Claustro-Sanguino, Carried.

Toby Cranston: Absent, Josiah Barron: Yea, Lesly Claustro-Sanguino: Yea, Travis Eynon: Yea, Veronica Gutierrez: Yea, Jon Lorence: Yea, Jorge Meza: Yea  
Yea: 6, Nay: 0, Absent: 1

##### C.3. Adjourn

The meeting was adjourned at 7:10pm.

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Board Chair

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Superintendent

**Umatilla School District #6R**  
**Financial Update**  
**March 2023**

The following Financial Update highlights the significant transactions for the Umatilla School District for the month:

**General Fund Highlights:**

- The General Fund collected the following:
  - Basic School Support, \$1,035,526 (2022-23 School Year)
  - Property taxes: Current year, \$92,440, Prior year, \$3,640
  
- Special Revenue Funds collected:
  -
  
- A copy of the check register is attached for your review. Current month obligation checks totaled \$679,947.56. Some of the larger expenditures include:
  - Foodcorps, Inc. – cost share for 2 Food Corp members
  - InterMountain ESD – Chromebooks, Google Chrome Management, replacement cameras, Dell Monitors, and supplies
  - Mid Columbia Bus Co. – January and February transportation
  - Stagecraft Industries – replacement of UHS Stage Curtains
  - Standard & Poor – analytical services in preparation for bond sale

**Other Notes:**

**UMATILLA SCHOOL DISTRICT 6R General Fund**  
**Statement of 2022-2023 Anticipated Revenue**

3/31/2023

Account	Budget	YTD Revenue	Anticipated	Total	+/(-) Budget
1111 Current Year's Levy*	\$ 4,300,000	\$ 4,399,487	174,000	\$ 4,573,487	\$ 273,487
1112 Prior Years' Levy*	75,000	62,954	12,046	75,000	-
1113-1190 County Sales Tax-Pymt in Lieu	300	233	0	233	(67)
1500 Earnings on Investments	40,000	149,782	45,000	194,782	154,782
1710 Admissions	2,000	-	-	-	(2,000)
1920 Contributions & Donations	500	10,448	-	10,448	9,948
1941 Svc Oth Dist Within State	25,000	-	-	-	(25,000)
1990 Miscellaneous (Includes Recovery)	35,000	66,066	-	66,066	31,066
2101 County School Fund*	35,000	52,192	-	52,192	17,192
2199 Other Intermediate Sources	-	7,328	-	7,328	7,328
3101 State School Support Fund*	12,200,000	10,329,066	2,659,925	12,988,991	788,991
3103 Common School Fund*	135,000	159,032	-	159,032	24,032
3299 Restricted State Other Grants	-	6,983	-	6,983	6,983
4500 Restricted Fed Govt thru State	-	17,626	-	17,626	17,626
4700 Federal Grants Thru Other Agencies	-	-	-	-	-
4801 Federal Forest Fees*	-	2,902	-	2,902	2,902
5000 Other Sources	-	-	-	-	-
<b>Total Revenue</b>	<b>\$ 16,847,800</b>	<b>\$ 15,264,100</b>	<b>\$ 2,890,971</b>	<b>\$ 18,155,071</b>	<b>\$ 1,307,271</b>
5400 Beginning Fund Balance	4,734,300	4,628,603	-	4,628,603	(105,697)
<b>TOTAL RESOURCES</b>	<b>\$ 21,582,100</b>	<b>\$ 19,892,703</b>	<b>\$ 2,890,971</b>	<b>\$ 22,783,674</b>	<b>\$ 1,201,574</b>

\* Local Revenue included within state formula.

**PROJECTED ENDING FUND BALANCE CALCULATION**

Revenues	\$ 18,155,071
Expenditures Estimated	<b>17,906,286</b>
Revenues Over (Under) Expend.	248,785
Beginning Fund Balance - AUDITED	<u>4,628,603</u>
Projected Ending Fund Balance	<b><u>4,877,388</u></b>
Unappropriated Ending Fund Balance	\$ -

**Basic School Support Estimate**

2022-2023 BSSF Estimate as of May 19, 2022	
1,362 ADMr	12,376,401
2022-2023 BSSF Estimate as of Nov. 23, 2022	
1,344 ADMr	12,431,290
2022-2023 BSSF Estimate as of Mar. 21, 2023	
1,397 ADMr	12,988,991

**Historical Expenditure Review**

<b>Expenditures 2023</b>	<b>17,906,286</b>	<b>Estimated</b>
Expenditures 2022	16,554,990	<b>Audited</b>

UMATILLA School District 6R  
Statement of 2022-2023 Anticipated Expenditures

3/31/2023

Cost Center	Budget	Encumbrances	YTD Expenditures	Free Balance
1111 Elementary (MHES)	\$ 4,242,895	\$ 1,495,065	\$ 2,773,251	\$ (25,421)
1121 CBMS Middle School	1,795,476	512,183	900,728	382,566
1122 CBMS Extra Curricular	79,185	1,886	44,018	33,280
1131 Umatilla High School	2,641,468	948,239	1,494,626	198,603
1132 Umatilla HS Extra Curricular	388,136	80,668	288,715	18,753
1210 TAG Program	9,430	2,561	3,997	2,872
1250-1259 Special Education/Spec. Ed. Life Skills	1,894,584	502,536	1,038,295	353,753
1271 Remediation	112,029	31,278	42,871	37,880
1291 ELL Program	1,365,550	328,004	579,635	457,911
1430 UHS Summer School	9,192	-	-	9,192
1460 Special Programs Summer	21,488	-	-	21,488
2114 Student Accounting	229,118	79,217	121,259	28,642
2115 Student Safety	6,225	-	2,474	3,751
2120 Guidance Counseling	556,923	170,894	274,332	111,697
2130 Health Services	500	-	1,028	(528)
2140 Psychological Services	30,000	-	-	30,000
2210 Improvement of Instruction	142,470	21,362	59,481	61,627
2220 Educational Media Services	282,066	70,574	115,205	96,287
2230 Assessment & Testing	157,390	15,982	102,902	38,506
2240 Staff Development	393,698	36	58,042	335,620
2310-2321 Board/Superintendent	723,215	128,754	480,768	113,693
2410 Office of Principal	1,327,748	297,998	865,953	163,797
2520 Fiscal Services	254,765	36,087	214,402	4,276
2540 Plant Operations & Maintenance	2,307,042	388,847	1,358,427	559,769
2550-2558 Student/ Spec Ed. Transportation	847,750	243,528	554,684	49,539
2630-2639 Volunteer Programs/Other Info. Services	157,050	30,775	93,725	32,550
2640 HR Staff Services	132,900	30,076	98,400	4,424
2645-2649 Health Services/Other Staff Services	10,000	-	8,644	1,356
2660 Technology Services	524,710	51,644	374,590	98,476
2680 Interpret/Translation Services	900	-	337	563
3300 Community Services	26,197	-	7,114	19,083
6000 Contingencies	662,000	-	-	662,000
<b>Total Expenditures</b>	<b>21,332,100</b>	<b>5,468,194</b>	<b>11,957,901</b>	<b>3,906,005</b>
Transfer of Funds	250,000	250,000	-	-
Unappropriated Ending Fund Balance	-	-	-	-
<b>TOTAL</b>	<b>\$ 21,582,100</b>	<b>\$ 5,718,194</b>	<b>\$ 11,957,901</b>	<b>\$ 3,906,005</b>

FUNCTION	Budget	Encumbrances	YTD Expenditures	Free Balance
1000 Instructional Services	\$ 12,559,433	3,902,420	\$ 7,166,136	\$ 1,490,877
2000 Support Services	8,084,470	1,565,774	4,784,651	1,734,046
3000 Community Services	26,197	-	7,114	19,083
5000 Transfer of Funds	250,000	250,000	-	-
6000 Contingency	662,000	-	-	662,000
<b>Total Expenditures</b>	<b>21,582,100</b>	<b>5,718,194</b>	<b>11,957,901</b>	<b>3,906,005</b>
7000 Fund Balance	-	-	-	-
<b>TOTAL</b>	<b>\$ 21,582,100</b>	<b>\$ 5,718,194</b>	<b>\$ 11,957,901</b>	<b>\$ 3,906,005</b>

OBJECTS	Budget	Encumbrances	YTD Expenditures	Free Balance
100 Salaries	\$ 9,629,342	\$ 2,951,764	\$ 5,582,378	\$ 1,095,199
200 Payroll Taxes & Benefits	6,842,055	2,001,988	3,544,842	1,295,224
300 Purchased Services	2,388,095	374,440	1,524,527	489,128
400 Supplies and Materials	1,399,493	64,254	954,458	380,782
500 Capital Outlay	136,500	75,748	104,173	(43,420)
600 Other Objects	274,615	-	247,523	27,092
700 Interfund Transfers	250,000	250,000	-	-
800 Contingency	662,000	-	-	662,000
<b>Total Expenditures</b>	<b>21,582,100</b>	<b>5,718,194</b>	<b>11,957,901</b>	<b>3,906,005</b>
Unappropriated Ending Fund Balance	-	-	-	-
<b>TOTAL</b>	<b>\$ 21,582,100</b>	<b>\$ 5,718,194</b>	<b>\$ 11,957,901</b>	<b>\$ 3,906,005</b>

Umatilla SD Other Funds - 2022-2023

EXPENDITURES

Fund	Description	Budget	Encumbrances	YTD Expenditures	Free Balance
203	CTE Career Pathways	\$ 22,000	\$ -	1,854	\$ 20,146
204	Umatilla Sports Complex	32,610	-	-	32,610
205	ORTOP	10,000	-	-	10,000
206	Medicaid Claiming	93,440	-	-	93,440
207	SB 1149	40,500	-	-	40,500
210	ECIA Title I	574,950	146,254	272,043	156,653
211	Title IA ESSA	145,750	17,478	127,767	505
212	ECIA Title IIA	71,065	23,085	31,954	16,026
214	ECIA Title III	63,954	24,255	33,502	6,197
216	Title IVA Safe & Drug Free Schools	60,000	-	19,135	40,865
217	21st CCLC	559,276	78,837	383,090	97,349
218	Outdoor School	55,000	-	-	55,000
219	Title VIB REAP	42,000	5,564	2,352	34,085
221	Title 1C Migrant Ed	46,315	17,585	24,289	4,441
223	Children's Reading Foundation	3,201	-	-	3,201
224	IDEA	102,375	45,428	59,748	(2,801)
225	IDEA Enhancement Grant	3,125	-	-	3,125
230	CARES Act (ESSER I/CDL)	5,000	-	-	5,000
235	ESSER II Funds	830,200	137,235	409,916	283,049
236	ESSER III Funds	1,726,500	209,837	364,376	1,152,287
239	HS Success Grant	421,071	137,455	279,384	4,232
243	OR First Robotics Grant	20,000	-	-	20,000
250	Child Nutrition Fund	1,494,520	454,850	834,624	205,046
251	Farm to School Grant	40,000	11,202	24,448	4,350
255	Student Investment Acct (SIA)	1,298,700	344,827	708,302	245,570
258	Youth Transition Program Grant	126,995	19,890	63,340	43,765
259	Summer Academic Support Grant	295,675	-	248,966	46,709
261	Education Project Grant	18,500	-	-	18,500
267	OR Healthy Schools Grant	35,000	-	2,364	32,636
284	Daycare Center	83,650	11,616	33,650	38,384
285	MHES ASB	50,000	-	-	50,000
290	CBMS ASB	50,000	-	-	50,000
295	UHS ASB	235,000	-	-	235,000
299	Miscellaneous Grants	304,000	50,986	221,122	31,891
302	Debt Service	1,195,000	-	1,175,100	19,900
303	PERS UAL Debt Service	1,122,000	855,409	175,409	91,183
451	Capital Projects Fund	250,050	70,357	40,082	139,611
452	2016 GO Bond Capital Projects Fund	155,500	6,000	31,067	118,433
453	Construction Excise Tax	300,000	-	-	300,000
455	Capital Projects 2022 GO	48,650,000	-	42,198	48,607,802
	<b>Total Expenditures</b>	<b>\$ 60,632,922</b>	<b>\$ 2,668,150</b>	<b>\$ 5,610,081</b>	<b>\$ 52,354,691</b>

RECAP

Fund	Description	Beginning Balance	YTD Receipts	Expenditures	Ending Balance
203	CTE Career Pathways	\$ -	\$ -	1,854	\$ (1,854)
204	Umatilla Sports Complex	3,308	-	-	3,308
205	ORTOP	-	3,850	-	3,850
206	Medicaid Claiming	3,420	120,000	-	123,420
207	SB 1149	6,204	30,027	-	36,231
210	ECIA Title I	-	-	272,043	(272,043)
211	Title IA ESSA	-	95,684	127,767	(32,082)
212	ECIA Title IIA	-	-	31,954	(31,954)
214	ECIA Title III	-	4,654	33,502	(28,847)
216	Title IVA Safe & Drug Free Schools	-	19,135	19,135	-
217	21st CCLC	(153,158)	284,726	383,090	(251,522)
218	Outdoor School	(24,199)	25,099	-	900
219	Title VIB REAP	-	-	2,352	(2,352)
221	Title 1C Migrant Ed	-	3,375	24,289	(20,914)
223	Children's Reading Foundation	3,200	-	-	3,200
224	IDEA	-	-	59,748	(59,748)
225	IDEA Enhancement Grant	-	-	-	-
230	CARES Act (ESSER/CDL)	-	-	-	-
235	ESSER II Funds	(9,794)	14,773	409,916	(404,937)
236	ESSER III Funds	(248,824)	485,391	364,376	(127,808)
239	HS Success Grant	6	1,998	279,384	(277,380)
243	OR First Robotics Grant	-	-	-	-
250	Child Nutrition Fund	614,666	810,123	834,624	590,165
251	Farm to School Grant	(8,800)	8,800	24,448	(24,448)
255	Student Investment Acct (SIA)	190,073	634,542	708,302	116,312
258	Youth Transition Program Grant	9,383	46,657	63,340	(7,299)
259	Summer Academic Support Grant	-	248,966	248,966	-
261	Education Project Grant	18,040	356	-	18,396
267	OR Healthy Schools Grant	(3,139)	3,139	2,364	(2,364)
284	Daycare Center	59,591	69,534	33,650	95,476
285	MHES ASB	24,726	-	-	24,726
290	CBMS ASB	15,408	-	-	15,408
295	UHS ASB	169,879	-	-	169,879
299	Miscellaneous Grants	3,684	95,129	221,122	(122,310)
302	Debt Service	143,195	1,129,576	1,175,100	97,672
303	PERS UAL Debt Service	89,796	936,285	175,409	850,673
451	Capital Projects Fund	(21,624)	74,880	40,082	13,174
452	2016 GO Bond Capital Projects Fund	67,542	50,017	31,067	86,491
453	Construction Excise Tax	97,973	296,841	-	394,814
455	Capital Projects 2022 GO	-	-	-	-
	<b>Total Resources</b>	<b>\$ 1,050,557</b>	<b>\$ 5,493,558</b>	<b>\$ 5,567,883</b>	<b>\$ 976,231</b>

\* Balances are Audited.

UMATILLA SCHOOL DISTRICT 6R  
 Monthly Revenue and Expenditure Summary

GENERAL FUND

2022-2023

ACCT #	SOURCE	BUDGET	JULY	AUG	SEP	OCT	NOV	DEC	JAN	FEB	MAR	Projected	Projected	Projected	TOTAL	Over/(Under)
												APR	MAY	JUNE		
<b>RESOURCES</b>																
1111	Current Year Taxes	4,300,000	-	-	-	-	3,560,357	652,684	60,041	33,965	92,440	13,500	15,000	75,000	4,502,987	202,987
1112	Prior Year Taxes	75,000	-	15,401	13,329	3,870	14,494	1,282	5,003	5,934	3,640	2,759	5,788	-	71,501	(3,499)
113-119	County Sales Tax-Pymt in Lieu	300	-	-	-	-	-	-	233	-	-	-	-	12,000	12,233	11,933
1500	Interest on Investments	40,000	6,392	9,284	9,589	10,701	16,205	23,354	24,561	23,903	25,792	4,046	4,883	4,500	163,211	123,211
1710	Admissions	2,000	-	-	-	-	-	-	-	-	-	-	-	-	-	(2,000)
1920	Contributions	500	465	9,708	-	-	-	-	-	-	275	-	600	-	11,048	10,548
1941	Svc Oth Dist Within State	25,000	-	-	-	-	-	-	-	-	-	-	-	-	-	(25,000)
1990	Miscellaneous	35,000	1,823	4,116	204	7,418	217	17,682	265	32,537	1,804	-	1,517	-	67,583	32,583
2101	County School Funds	35,000	-	-	-	-	-	-	52,192	-	-	-	-	-	52,192	17,192
2199	Other Intermediate Sources	-	-	-	2,178	-	2,901	-	-	-	2,248	-	2,427	-	9,755	9,755
3101	State School Support	12,200,000	2,063,146	1,030,954	1,030,954	1,030,954	1,030,954	1,035,526	1,035,526	1,035,526	1,035,526	1,031,573	1,031,573	(8,749)	12,383,463	183,463
3103	Common School Fund	135,000	76,199	-	-	-	-	-	-	82,833	-	-	-	-	159,032	24,032
3299	Other Restricted Grants-in-Aid	-	-	-	6,983	-	-	-	-	-	-	-	-	-	6,983	6,983
4500	Restricted Fed thru State	-	8,546	-	9,080	-	-	-	-	-	-	-	-	-	17,626	17,626
4700	Federal Grants thru Other Agencies	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
4801	Federal Forest Fees	-	-	-	-	-	-	-	2,902	-	-	-	-	-	2,902	2,902
5000	Other Sources	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
	<b>Total Revenue</b>	16,847,800	2,156,571	1,069,463	1,072,316	1,052,943	4,625,129	1,730,529	1,180,724	1,214,698	1,161,725	1,051,879	1,061,788	82,751	17,460,516	612,716
5400	Beginning Fund Balance	4,734,300	4,628,603	-	-	-	-	-	-	-	-	-	-	-	4,628,603	(105,697)
	<b>Total Resources</b>	21,582,100	6,785,174	1,069,463	1,072,316	1,052,943	4,625,129	1,730,529	1,180,724	1,214,698	1,161,725	1,051,879	1,061,788	82,751	22,089,119	507,019
<b>REQUIREMENTS</b>																
100	Salaries	9,629,342	146,709	179,607	727,573	767,626	761,400	758,520	736,870	753,460	750,613	750,000	750,000	1,705,000	8,787,378	841,964
200	Benefits	6,842,055	118,440	121,029	459,083	477,375	441,693	475,552	479,841	485,746	486,084	465,000	465,000	1,355,000	5,829,842	1,012,213
300	Purchased Services	2,388,095	66,187	213,285	75,886	106,625	172,711	197,882	301,237	86,964	302,802	170,000	170,000	185,000	2,048,580	339,515
400	Supplies & Materials	1,399,493	64,057	400,546	86,606	121,412	63,616	18,506	35,633	22,762	141,319	65,000	65,000	87,000	1,171,458	228,035
500	Capital Outlay	136,500	-	7,019	16,914	25,058	-	-	12,269	33,783	9,130	37,500	37,500	-	179,173	(42,673)
600	Other Objects	274,615	193,124	4,011	4,303	34,470	1,631	1,611	1,198	470	6,707	1,000	1,000	671	250,194	24,421
720	Transfers	250,000	-	-	-	-	-	-	-	-	-	-	-	250,000	250,000	-
800	Contingency	662,000	-	-	-	-	-	-	-	-	-	-	-	-	-	662,000
	<b>Total Expenditures</b>	21,582,100	588,517	925,496	1,370,366	1,532,565	1,441,052	1,452,070	1,567,047	1,383,185	1,696,656	1,488,500	1,488,500	3,582,671	18,516,625	3,065,475
<b>Monthly Fund Balance</b>		0	6,196,656	143,967	(298,050)	(479,622)	3,184,077	278,458	(386,323)	(168,486)	(534,930)	(436,621)	(426,712)	(3,499,920)	3,572,494	
<b>Accumulated Fund Balance</b>		0	6,196,656	6,340,624	6,042,574	5,562,952	8,747,029	9,025,488	8,639,165	8,470,679	7,935,748	7,499,127	7,072,415	3,572,494	3,572,494	
<b>% of Budgeted Resources</b>			31.44%	4.96%	4.97%	4.88%	21.43%	8.02%	5.47%	5.63%	5.38%	4.87%	4.92%	0.38%	102.35%	
<b>% of Budgeted Requirements</b>			2.73%	4.29%	6.35%	7.10%	6.68%	6.73%	7.26%	6.41%	7.86%	6.90%	6.90%	16.60%	85.80%	

**Umatilla School District 6R**

**BOARD REPORT**

**Mar-23**

<b>VENDOR</b>	<b>DETAIL</b>	<b>AMOUNT</b>	<b>FUND</b>
1 3rd Generation Farms	Produce Farm to School	\$ 2,972.70	251
2 AAF International	Air Filters	\$ 951.44	
3 AJ'S Printed Apparel	Jackets	\$ 665.00	
4 Allstream	Long Distance	\$ 232.39	
5 Amazon	Ziplocs; Tablecloths; Dodgeball Set; Pencil Sharpener; Baking Dishes; Presentation Boards; Dress Form; Podcasting Equipment; Craft & Classroom Supplies	\$ 1,702.44	100; 217; 235
6 American School Counselors	Grief & Loss Training Sarah Blake	\$ 99.00	
7 AndyMark, Inc.	FRC Robotics Supplies	\$ 576.98	239
8 Aufdermauer, Natalie	Mileage; Snacks PTO Supplies; Wix.com: Voice Equity Registration; TSPC Licenses; Robotics Meals; HAAS Automation; REN Dinner; Backdrop; Parking Fees; Zoom; Inst. Coach Meal; Bag Fees; Travel Expenses; Netflix; Cloud/Lizzie; Or Portal Fees; Student Shoes; Fingerprinting; Lodging; Robotics Images; Airfare; Appreciation meals; Crafts; Carpet Shampoo; Staff Lunch; Vacuum	\$ 45.39	100; 217; 219; 239; 255
9 Banner Bank		\$ 11,724.79	
10 Barron, Josiah	NSBA Travel Per Diem	\$ 310.50	
11 Bedolla Garcia, Alondra	Tye Dye T Shirts	\$ 41.72	217
12 Blue Mountain Basketball	Officials Fees	\$ 3,100.00	
13 Blue Mtn Baseball/Softball	Officials Fees	\$ 4,605.50	
14 Bow, Scott	Travel Expenses; Baseball Pullovers	\$ 3,441.94	
15 Bruce Heating & Air	Heating & Air Maintenance	\$ 1,835.18	
16 BSN Sports	Enduro Pole Set; Tennis Shirts	\$ 850.96	
17 Brurres, Elizabeth	OSPRA Conf Travel Expenses	\$ 538.14	
18 Carrillo, Samantha	NABE Conf Meals	\$ 147.37	
19 Cart and Can, LLC	Dairy/Milk Purchases	\$ 9,572.43	250
20 Cascade Athletic Supply	Shot Clock; Brackets; Prewrap Tape; Track Jerseys	\$ 1,758.90	
21 Cascade Natural Gas	Heating Fuel	\$ 7,981.00	100; 250
22 Cengage Learning, Inc.	Textbooks	\$ 81,940.00	
23 CenturyLink	Telephones	\$ 1,251.03	
24 Chem-Aqua, Inc.	UHS Water Treatment	\$ 333.89	
25 Child Care Resource & Referral	Workshop - Resendiz & Casteneda	\$ 110.00	210
26 City of Umatilla	Water; Sewer; Garbage	\$ 4,974.31	100; 250
27 Classy Threads	Sewing Supplies	\$ 1,183.70	235
28 Claustro-Sanguino, Lesly	NSBA Conf Travel Expenses	\$ 840.89	
29 Coleman Oil	Gas/Diesel	\$ 591.51	
30 Columbia Harvest Foods	Food Supplies	\$ 507.07	217; 235
31 COSA	OR Small School Conf; April Conf Sipe	\$ 500.00	
32 Cotterell, Richard	Class Appreciation; Mileage Reimbursement	\$ 313.77	
33 Cranston, Toby	Per Diem; Mileage Reimbursement NSBA	\$ 959.88	
34 Crown Paper & Janitorial	Janitorial Supplies	\$ 996.20	
35 CRS Mini Storage	STEAM Storage Rental	\$ 54.00	
36 Desert Springs Bottled Water	Water; Delivery; Cooler Rental	\$ 56.25	
37 DJC Oregon	BID Advertising	\$ 164.56	455
38 Durfey, Dan	Lodging OVMA Seaside	\$ 388.14	
39 Engelhart, Charlotte	NABE Travel Expense	\$ 1,056.97	
40 Escovedo, Guadalupe	Mileage Reimbursement	\$ 53.06	
41 Eynon, Travis	NSBA Travel Expenses	\$ 1,066.25	
42 Foodcorps Inc	Cost Share for 2 Food Corp Members	\$ 20,000.00	250
43 Garrett Hemann Roberts	Legal Fees	\$ 1,825.00	
44 Gattis, Tammy	STEAM Supplies	\$ 107.01	217
45 Greater Oregon League	Lodging Ad Conference	\$ 372.73	
46 Gutierrez, Veronica	NSBA Travel Expenses	\$ 1,100.64	
47 Hermiston Track and Field	Meet Fees	\$ 50.00	
48 Hill, Clinton	Spring Play Scripts	\$ 559.23	217
49 Home Depot	FRC Robotics Supplies; Maintenance/Grounds Supplies Alcohol Wipes; Facial tissue; Bandages; Cold Packs; Paper; Glue Sticks; Posters; Envelopes; Laminating Film; Netgear 8-port Gigabite; Seagate Ironwolf; Laser Jet Pro; Google Chrome Management; Wall or Ceiling Mounts; Display Adapter; Chromebooks; AV08CPD-118 8 Megapixe; Contreaip Outdoor Dome; Conteraip Indoor Dome; Dell Monitors; Edmentum	\$ 1,938.50	100; 239
50 Intermountain ESD		\$ 55,901.62	100; 203
51 Inland Development	Telecommunications	\$ 237.21	
52 Jaimez, Tessa	NABE Conference Travel Expenses	\$ 205.94	
53 Jepsen, Margaret	NABE Conference Travel Expenses	\$ 615.53	
54 Jimmy's Johns Portable Potty	Porta Potty Rentals	\$ 126.00	
55 JW Pepper & Son	Sheet Music	\$ 355.24	
56 Karan, Salesh	Mileage Wild Horse; Tuition Reimbursement	\$ 975.68	100; 299
57 Kelley Connect	Staples	\$ 59.00	
58 KIE Supply	Irrigation Supplies	\$ 91.29	
59 Kik's Golf Cengter LLC	Facility Use for Season	\$ 500.00	

VENDOR	DETAIL	AMOUNT	FUND
60 Laurence, Karen	NABE Conference Travel Expenses	\$ 128.65	
61 Leaf Capital Funding	Kyocera Lease	\$ 4,222.57	
62 Ledbetter's Refrigeration	Cooler & Freezer Repair	\$ 570.80	250
63 Liebe, Mykel	NABE Conference Travel Expenses	\$ 543.29	
64 Lorence, Eunice D	Travel Expenses Walla Walla CC HS Partners	\$ 79.00	
65 Lorence, Robert	Travel Expenses Wrestling Tigard	\$ 1,611.51	
66 Lougee, David	NABE Conference Travel Expenses	\$ 3,394.23	
67 Martinez, Grace	NABE Conference Travel Expenses	\$ 127.20	
68 McMaster-Carr	FRC Robotics	\$ 3,440.87	239
69 Mele, Mindy	Tuition Reimbursement	\$ 2,200.00	100; 299
70 Meza, Jorge	NSBA Conference Travel Expenses	\$ 662.90	
71 Mid Columbia Bus	Student Transportation (January & February)	\$ 184,728.98	
72 Mirabeau Park Hotel	Robotics Lodging Spokane	\$ 7,744.80	239
73 North Coast Electric	Maintenance Supplies	\$ 264.86	
74 Nygren, Holly	FACS Supplies; FCCLA Clothing & Conference	\$ 648.61	235; 255
75 OADA	2023 OADA Annual Conference	\$ 325.00	
76 Office Of The State Treasurer	OSBG Appl fee	\$ 200.00	455
77 Oregon School Personnel Assoc	Winter Conference	\$ 399.00	
78 OSBA	OSBA Conference November 2022	\$ 3,810.00	
79 Pacific Power	Electricity	\$ 50,342.44	
80 PBS Engineering	Ahera Surveillance	\$ 2,000.00	452
81 Pendleton Track & Field	Track Meet Fees	\$ 100.00	
82 Pottorff, Coni	OR Law Seminar Registration	\$ 550.00	
83 Pottorff, Rex	Door Guard	\$ 32.34	
84 R & R Sports Tropies	Retirement Gift / Lorence	\$ 53.00	
85 Ridings, Kristina	STEAM Supplies; NAA Travel Expenses	\$ 504.50	217
86 Riomondo, Rebecca	NABE Conference Travel Expenses	\$ 132.87	
87 Riverside High School	Entry Fee - Wrestling	\$ 200.00	
88 Shelco Electric	Greenhouse Electrical	\$ 3,150.00	239
89 Sipe, Heidi	Robotics Expenses - Yakima	\$ 2,263.76	219
90 Smith Security	CBMS Fire Alarm	\$ 504.00	
91 Smitty's Ace Hardware	Gloves; Fuel Additive; Keys; Light Switch; Rope; Ties; Nuts; Bolts	\$ 179.12	100
92 Stagecraft Industries	UHS Stage Curtains	\$ 9,130.00	
93 Standard & Poor	Analytical Services	\$ 33,300.00	455
94 State of Oregon Employment Dept	Unemployment	\$ 3,476.07	100; 250
95 Sefani, Vincent	Mileage Pasco	\$ 39.83	
96 Stoel Rives	Legal Services	\$ 2,988.00	455
97 Subzero Nitrogen Ice Cream	STEAM Presentation	\$ 537.57	217
98 Ted Brown Music	Instrument Repairs; Band Supplies	\$ 662.78	
99 The Dalles High School	Track Meet Fees	\$ 50.00	
100 Umatilla-Morrow Head Start	Grant 123 Transportation	\$ 480.32	
101 United Salad	Food Supplies/Produce	\$ 1,556.15	250
102 US. Foods	Food & supply Purchases	\$ 114,265.56	250
103 Verizon Wireless	Transportation Secretary (2 months)	\$ 215.83	
104 Wagner, Tammy	Day Care Supplies	\$ 214.81	239
105 WCP Solutions	Supply Way Temp Rinse & Fail Safe	\$ 909.63	250
106 West Extension Irrigation District	Irrigation Fee 1st Half 2023	\$ 235.95	
107 White, Tess	Robotics Meals	\$ 927.14	217
108 Williams-Strege, Stephanie	NAA Conference Travel Expenses	\$ 327.75	

**TOTAL** \$ **679,947.56**

- |   |  |
|---|--|
| Fund 203-Career Pathways Grant                | Fund 236-ESSER III Funds                   |
| Fund 204-Umatilla Sports Comp/Improv          | Fund 239 - Measure 98                      |
| Fund 205-ORTOP                                | Fund 243-Oregon FIRST Robotics Program     |
| Fund 206-Medicaid Administration              | Fund 250-Food Service                      |
| Fund 207-SB-1149                              | Fund 251-Farm to School                    |
| Fund 210-Title IA Improving Basic Programs    | Fund 255-Student Investment Account        |
| Fund 211-Title IA - ESSA                      | Fund 258-Youth Transition (YTP)            |
| Fund 212-Title IIA-PTR Teachers/Principals    | Fund 259-Summer Academic Support Grant     |
| Fund 214-Limited English Prof. Students       | Fund 261-State Education Project (Lottery) |
| Fund 216-Title IVA - Safe & Drug Free Schools | Fund 267-OR Healthy Schools Grant          |
| Fund 217-21st CCLC                            | Fund 284-Daycare Center                    |
| Fund 218 - Outdoor School Education Fund      | Fund 285-Elementary A S B (MHES)           |
| Fund 219-Title VIB - Rural Low Income Schools | Fund 290-Middle A S B (CBMS)               |
| Fund 221-Title 1C Migrant                     | Fund 295-High A S B (UHS)                  |
| Fund 223-Children's Reading Foundation        | Fund 299-Miscellaneous                     |
| Fund 224-I.D.E.A.                             | Fund 302-Debt Service - High School        |
| Fund 225-Special Ed. I.D.E.A.                 | Fund 303-Debt Service - PERS UAL           |
| Fund 227-Gear Up!                             | Fund 451-Capital Projects                  |
| Fund 230-Cares (ESSER I/CDL)                  | Fund 452-2016 GO Bond Capital Projects     |
| Fund 235-ESSER II Funds                       | Fund 453-Construction Excise Tax           |

## **UMATILLA SCHOOL DISTRICT #6R**

April 13, 2023

### **Superintendent's Recommendation**

#### **Recommendations for Hire:**

**Anthony Pepitone**- Anthony went to University of Portland and received his BA in philosophy, graduating in 2005. He then attended Texas A&M University and he graduated in 2010 with his Masters of Arts in Philosophy. In 2016, he graduated from Portland State University with a Masters of Education in Special Education. While obtaining his Masters Degree he worked as a teacher's assistant at the autistic community activity program, in Portland, Oregon. He then worked as a resource teacher at a charter school in Reynolds School District for two years. He then worked at Newburg School District for five years, as a resource room teacher. Last year, he left Newburg to move closer to family.

**Katherine Simmons** - Special Education Secretary

**Ebony Wilson** - MHES Temporary Behavior Specialist

**Delma Bernal** - Payroll Clerk

#### **Resignations:**

Amethyst (Amy) Jewett - UHS Science Teacher

Isaac Mejia Ortiz - Payroll Clerk

Tammy Wagner - UHS Volleyball Coach

#### **Retirements:**

Charleen Lynch - MHES Educational Assistant



**alliance**

MANAGEMENT & CONSTRUCTION SOLUTIONS

**MAIN ENTRANCE**

**McNARY HEIGHTS**

**Request for Proposals  
Project Management  
Services - March 24, 2023**

**COVER LETTER**

<b>1. BACKGROUND &amp; HISTORY OF FIRM</b>	<b>Page 1</b>
A. Insurance Certificate	
<b>2. PROJECT TEAM &amp; STAFFING</b>	<b>Page 3</b>
A. Approach to Construction Management	
B. Proposed Staff & Workload	
<b>3. RELATED EXPERIENCE</b>	<b>Page 5</b>
A. Energy Trust Experience	
<b>4. Overall Approach</b>	<b>Page 10</b>
A. Budget & Schedule	
B. Knowledge of Market	
B. Fee Structure	
- <b>APPENDIX items: References, Resumes, C Forms</b>	





March 24, 2023

Heidi Sipe—Superintendent  
Umatilla School District  
1001 6th Street  
Umatilla, OR 97882

Subject: Letter of Interest for Project Management Services

Mrs. Sipe,

As you know, Alliance Management & Construction Solutions is **very** excited to submit our proposal for Project Management Services for the 2022 Bond Projects! Working with the School District on the 2017 Bond Projects allowed us to develop a connection with your staff, the kids you serve, and the community as a whole. Partially due to our successful experience on your last bond projects, we are currently working with the Umatilla Hospital District to help them oversee design and construction of a new Medical Office Building for the local clinic. Simply put, we like working in Umatilla and want to continue to do so.

Alliance has grown since you hired us last. Now we are led by two Principals, Doug Carl and Earl Eastman. Doug Carl was the Capital Projects Director for the Kennewick School District for approximately 15 years and successfully wrote, directed, and completed 3 capital bond project campaigns. During his tenure Doug oversaw 21 building projects. Doug has continued to help public owners' plan, budget, program and administer contracts for multiple projects since joining Alliance 5 years ago. Additionally, Earl has now led dozens of school projects to successfully completion by providing pre-design support, budget and schedule oversight, quality control and strong owner advocacy for owners in the region.

We appreciate the opportunity to express our interest in serving the Umatilla School District again. We welcome the opportunity to partner with you to serve as your advocate and help achieve your objectives.

Sincerely,

Douglas M. Carl  
Principal

Earl Eastman  
Principal

## 1. Background and firm history

Earl Eastman started Alliance Management & Construction Solutions in February 2017. Earl had a long history as a project manager for both general contractors as well as subcontractors. While Earl's background gave him a great foundational strength as a construction manager, his real passions were in relationship building, team building, and problem solving. These core strengths led him to start the businesses. Five years after partnering with Doug Carl, Alliance has become a project management firm that now has extensive and specialized expertise helping K-12 Schools with capital improvements in all project phases. Doug has 34 years of K-12 work history and has been a teacher, an administrator and a Capital Projects Director.

As our highlighted projects pages provided herein detail, Alliance has recently helped several school districts with Pre-Project Planning, Site Study & Surveys, Facility Condition Assessments, Land Acquisition, Project Scheduling and Budgeting, Cost Estimating, Hiring of Professional Consultants, Construction Management, and Facility Operations and Maintenance projects. We provide a wide array of services, tailored to the School District's needs, and believe that we are best suited to help the Umatilla School District with all of its upcoming project needs.

### **Extensive K-12 Bond Program Management Experience**



Doug Carl and Earl Eastman, Alliance's two Principal's, have worked on over 35 different K-12 projects combined with total construction valuations exceeding \$500 million. Doug, while previously serving as the Capital Projects Director for the Kennewick School District, helped direct and write long range capital plans that led to the successful passing of Bonds in 2009 for \$68 million, a Bond in 2015 for \$89.5 million, and a Bond in 2019 for \$125 million. As the Capital Projects Director, Doug oversaw all aspects of planning, design, and construction for all Bond projects. Earl has successfully managed construction projects for several school districts as well as other public and private owners.

In just the last 5 years, Alliance has provided service as a Construction Manager and Owner's Representative for the following school districts:

- Pasco School District (current client)
- Kennewick School District (current client)
- Columbia Burbank School District
- Umatilla School District
- Pendleton School District
- Lone School District (current client)

# 1. Background (Insurance Certificate)

The sample Certificate of Liability Insurance below describes our current levels of coverage, deductibles, and identifies our insurance provider, Lloyd’s of London. The RFP asks for a \$2,000,000 limit of coverage. Alliance will increase it’s coverage to meet the RFP requirements after being awarded the project.

	<b>CERTIFICATE OF LIABILITY INSURANCE</b>	ALLIMAN-01	CZUMHOFF			
			DATE (MM/DD/YYYY) <b>3/14/2019</b>			
<p><b>THIS CERTIFICATE IS ISSUED AS A MATTER OF INFORMATION ONLY AND CONFERS NO RIGHTS UPON THE CERTIFICATE HOLDER. THIS CERTIFICATE DOES NOT AFFIRMATIVELY OR NEGATIVELY AMEND, EXTEND OR ALTER THE COVERAGE AFFORDED BY THE POLICIES BELOW. THIS CERTIFICATE OF INSURANCE DOES NOT CONSTITUTE A CONTRACT BETWEEN THE ISSUING INSURER(S), AUTHORIZED REPRESENTATIVE OR PRODUCER, AND THE CERTIFICATE HOLDER.</b></p>						
<p><b>IMPORTANT: If the certificate holder is an ADDITIONAL INSURED, the policy(ies) must have ADDITIONAL INSURED provisions or be endorsed. If SUBROGATION IS WAIVED, subject to the terms and conditions of the policy, certain policies may require an endorsement. A statement on this certificate does not confer rights to the certificate holder in lieu of such endorsement(s).</b></p>						
<b>PRODUCER</b> Basin Pacific Insurance & Benefits 6917 W Grandridge Blvd, Ste C Kennewick, WA 99336	<b>CONTACT NAME:</b> PHONE (A/C, No, Ext): <b>(509) 735-7506</b> FAX (A/C, No): <b>(509) 491-3322</b> E-MAIL: <b>gsimonson@basinpacific.com</b> ADDRESS:					
<b>INSURED</b> Alliance Management & Construction Solutions, LLC 6825 W Clearwater Ave Ste A101 Kennewick, WA 99336		INSURER(S) AFFORDING COVERAGE INSURER A : <b>Underwriters at Lloyd's, London</b> INSURER B : INSURER C : INSURER D : INSURER E : INSURER F :	NAIC #			
<b>COVERAGES</b>		<b>CERTIFICATE NUMBER:</b>				
		<b>REVISION NUMBER:</b>				
<p>THIS IS TO CERTIFY THAT THE POLICIES OF INSURANCE LISTED BELOW HAVE BEEN ISSUED TO THE INSURED NAMED ABOVE FOR THE POLICY PERIOD INDICATED. NOTWITHSTANDING ANY REQUIREMENT, TERM OR CONDITION OF ANY CONTRACT OR OTHER DOCUMENT WITH RESPECT TO WHICH THIS CERTIFICATE MAY BE ISSUED OR MAY PERTAIN, THE INSURANCE AFFORDED BY THE POLICIES DESCRIBED HEREIN IS SUBJECT TO ALL THE TERMS, EXCLUSIONS AND CONDITIONS OF SUCH POLICIES. LIMITS SHOWN MAY HAVE BEEN REDUCED BY PAID CLAIMS.</p>						
INSR LTR	TYPE OF INSURANCE	ADDL SUBR INSD WVD	POLICY NUMBER	POLICY EFF (MM/DD/YYYY)	POLICY EXP (MM/DD/YYYY)	LIMITS
A	<input checked="" type="checkbox"/> <b>COMMERCIAL GENERAL LIABILITY</b> <input type="checkbox"/> CLAIMS-MADE <input checked="" type="checkbox"/> OCCUR  GEN'L AGGREGATE LIMIT APPLIES PER: <input checked="" type="checkbox"/> POLICY <input type="checkbox"/> PROJ-JECT <input type="checkbox"/> LOC OTHER:	X	PSH001136251	3/13/2019	3/13/2020	EACH OCCURRENCE \$ <b>1,000,000</b> DAMAGE TO RENTED PREMISES (Ea occurrence) \$ <b>100,000</b> MED EXP (Any one person) \$ <b>5,000</b> PERSONAL & ADV INJURY \$ <b>1,000,000</b> GENERAL AGGREGATE \$ <b>2,000,000</b> PRODUCTS - COMP/OP AGG \$ <b>2,000,000</b> STOP GAP LIABIL \$ <b>1,000,000</b>
A	<b>AUTOMOBILE LIABILITY</b> <input type="checkbox"/> ANY AUTO OWNED AUTOS ONLY <input type="checkbox"/> SCHEDULED AUTOS <input checked="" type="checkbox"/> HIRED AUTOS ONLY <input checked="" type="checkbox"/> NON-OWNED AUTOS ONLY	X	PSH001136251	3/13/2019	3/13/2020	COMBINED SINGLE LIMIT (Ea accident) \$ <b>1,000,000</b> BODILY INJURY (Per person) \$ BODILY INJURY (Per accident) \$ PROPERTY DAMAGE (Per accident) \$ \$ \$
	<b>UMBRELLA LIAB</b> <input type="checkbox"/> OCCUR <b>EXCESS LIAB</b> <input type="checkbox"/> CLAIMS-MADE DED    RETENTION \$					EACH OCCURRENCE \$ AGGREGATE \$ \$
A	<b>WORKERS COMPENSATION AND EMPLOYERS' LIABILITY</b> ANY PROPRIETOR/PARTNER/EXECUTIVE OFFICER/MEMBER EXCLUDED? (Mandatory in NH)    Y/N <input type="checkbox"/> N/A If yes, describe under DESCRIPTION OF OPERATIONS below		PSH001136251	3/13/2019	3/13/2020	<input type="checkbox"/> PER STATUTE <input checked="" type="checkbox"/> OTH-ER E.L. EACH ACCIDENT \$ <b>1,000,000</b> E.L. DISEASE - EA EMPLOYEE \$ <b>1,000,000</b> E.L. DISEASE - POLICY LIMIT \$ <b>1,000,000</b>
A	<b>Professional</b>	X	PSH001136251	3/13/2019	3/13/2020	<b>Per Claim</b> <b>1,000,000</b>
DESCRIPTION OF OPERATIONS / LOCATIONS / VEHICLES (ACORD 101, Additional Remarks Schedule, may be attached if more space is required) RE Fire Station Planning Services Contract No. 19-011  City of Kennewick it's officers, employees, and volunteers are Additional Insured a by written wirtten contract as respects insureds operations						
<b>CERTIFICATE HOLDER</b>				<b>CANCELLATION</b>		
City of Kennewick PO Box 6108 210 W 6th Ave Kennewick, WA 99336				SHOULD ANY OF THE ABOVE DESCRIBED POLICIES BE CANCELLED BEFORE THE EXPIRATION DATE THEREOF, NOTICE WILL BE DELIVERED IN ACCORDANCE WITH THE POLICY PROVISIONS.  AUTHORIZED REPRESENTATIVE 		

## 2. Project Team & Staffing (our approach)

**Our Philosophy (a team approach):** For the last 25+ years, both Doug and Earl have managed to develop strong and trusted working relationships with multiple architects, engineers, general contractors, sub-contractors, specialty sub-consultants. We work hard to be a good team member with all of the of the project team participants. With this approach, we've developed many trusted working relationships that benefit the project owners we work with in various ways throughout both the design and construction process. When a need for specific expertise arises, or a problem comes up, we not only know the right firms to call, we know their work history and often times have the company owner's cell phone number in our phone contacts. Both Doug and Earl count on these trusted working relationships, and the new ones we continue to build on with every project to ensure team success. It takes a well managed, well organized, and good communicating team to complete any major project on time and on budget. We know how to lead those teams for the owners that we work for. It's what we do.



**Managing Communications and Expectations:** As your Owner's Representative we see ourselves as your in-house Project Manager. A good Project Manager is accountable, listens well, pays attention to the details, and follows through with the responsible party. Through detailed meeting notes, updated budgets and schedules that continue to develop and evolve as we go, Alliance will help manage communications and exceed District expectations.

**Controlling budget, schedule, and quality control:** For most of the Owner's we work for, Alliance is ultimately responsible for controlling the master budget, the master schedule, and ensuring that both a quality design and quality construction product is delivered. Budgetary success depends on making good decisions, and communicating clearly, at every step of the project. The clearer the scope of work, and the better the bid documents, the better the pricing usually looks. Schedule success and quality control can largely be ensured by hiring the right people, for the right project, and then give them all the information they need to do their work well. Ultimately its our job as the Owner's Agent and to ensure the right information and expectations are communicated well to the rest of the team. Additionally is our job to handle problems that arise if the design team or contractor are not meeting their contractual obligations. Weekly jobsite visits and attending the general contractor's and subcontractor's coordination meetings are a key to quality control.



## 2. Project Team & Staffing (personnel & workload)

Who is assigned to your project is what separates Alliance from our competitors. When you hire Alliance, both owner's, Doug and Earl will be working directly with you from start to finish. We are owner-operators and are both very hands on. Doug and Earl both would plan to attend all early planning and strategy meetings with the District. Doug would attend all meetings where key programming, design, project delivery strategy and budget decisions are being analyzed. Earl will be the lead point of contact during the budgeting, scheduling, bidding, construction, and closeout phases of the project.

### Home base location and travel

Both Doug and Earl live in the Tri-Cities. Our recent trips to Umatilla have taken us around 25 minutes each way. During the strategy and pre-construction process, both of us would plan to be in lone as much as required to keep our project moving forward. Earl will visit the jobsite at least weekly during construction for meetings and monitoring.

### Workload and current project assignments

Your Bond project fits in perfectly with our current workloads. Both Earl and Doug are available to attend regular meetings now, and begin working on this project right away. The other project commitments we have are listed below. smaller projects, or an ongoing Capital Projects department support role.



#### Doug:

Umatilla School District Bond Program	20%	Available to begin work immediately
Kennewick Fire Station #1	15%	Construction completes in July 2024
Pasco School District	50%	Ongoing contract to support Capital Projects Department
lone School District Bond Program	15%	Bond work will continue through December of 2024

#### Earl:

Umatilla School District Bond Program	50%	Available to begin work immediately
Umatilla Hospital District Clinic Bldg.	10%	Construction starts in July 2023 and ends in July of 2024
Kennewick School District	10%	Ridge View Elementary complete in December 2023
lone School District Bond Program	20%	Bond work will continue through December of 2024

### 3. Related Experience & Project History



#### 2017 Pasco School District Bond Program Management

Pasco School District hired Alliance in 2018 and we have been working for them continuously since that time. For the 2017 Bond Program our scope of work as the Program Manager included, project development, master scheduling, master budget management, design team procurement & management, bidding oversight, construction oversight and quality control.

Projects include:

- ◇ Three Rivers Elementary, 74k sf. new elementary school
- ◇ Ray Reynolds Middle School, 114k sf. new middle school
- ◇ Columbia River Elementary, 74K sf. new elementary school
- ◇ Stevens Middle School, 106k sf. replacement school
- ◇ Transportation Services Building
- ◇ Security and access control improvements in all schools

PSD Contact: Raul Sital, Superintendent  
of Operations & Support Services

Ph: 509-546-6700

Email: [rsital@psd1.org](mailto:rsital@psd1.org)

Alliance managed all of the 2017 Bond Projects (\$99 Million) listed above.



### 3. Related Experience & Project History



#### 2019 Kennewick School District Bond Program

- ◇ Kennewick High School, new-in-lieu
- ◇ Amistad Elementary, new-in-lieu
- ◇ Southridge High School, new addition
- ◇ Kamiakin High School, new addition
- ◇ Ridge View Elementary, new-in-lieu

KSD Contact: Ryan Jones,  
Capital Projects Manager  
Ph: 509-222-6810  
Email: [rjones@ksd..org](mailto:rjones@ksd..org)

The 2019 \$125 million Bond included one new elementary school, one new-in-lieu elementary school, one new-in-lieu high school and new additions to two high schools. The Kennewick High School 250,000k sf.

Alliance’s role: before joining Alliance, Doug Carl was responsible for all of the Pre-Bond planning, design team procurement, programming, and management of schematic design phases of work for every project listed in the Bond above. After the Bond was passed in 2019, Alliance was awarded the contract for Construction Management services on the following projects: Amistad phase 1, Amistad phase 2, Southridge High School’s Expansion & Renovations, Kamiakin High School’s Expansion & Renovation as well as the Ridge View Elementary Replacement project.





## 2016 Columbia School District Bond Program

- ◇ Elementary School gymnasium building, new
- ◇ Elementary restroom renovations
- ◇ Elementary classroom remodel upgrades
- ◇ Elementary 2 classrooms addition, new
- ◇ High School reroofing project
- ◇ Elementary playground improvements



The 2016 \$4.5 million Bond included the capital projects listed above. The Alliance scope of work included establishing an overall project schedule and budget, hiring the design team, overseeing the design pro-

CSD Contact: Todd Hilberg,  
Superintendent

Ph: 509-851-3537

Email: [todd.hilberg@csd400.org](mailto:todd.hilberg@csd400.org)



# Umatilla School District

USD Contact: Heidi Sipe  
Superintendent

Ph: 541-720-0227

Email: [sipeh@umatillasd.org](mailto:sipeh@umatillasd.org)



## 2016 Umatilla School District Bond Program

- ◇ McNary Heights Elementary, remodel
- ◇ McNary Heights Elementary, kitchen renovations
- ◇ McNary Heights Elementary, new gymnasium
- ◇ Clara Brownwell Middle School, renovation
- ◇ Umatilla High School, system upgrades & remodel



The 2016 \$9.5 million Bond included one new building , upgrades to safety and security for three schools and entry way renovations at three schools. The Alliance scope of work including hiring the design team, overseeing the design process deliverables, and budget development and adherence. Alliance’s scope additionally included hiring the general contractor and providing quality assurance. Alliance fully represented the District as the overall project manager and owner’s representative.



## 2015 Kennewick School District Bond Program

- ◇ Eastgate Elementary, new-in-lieu
- ◇ Sage Crest Elementary, new school
- ◇ Desert Hills Middle School, new-in-lieu
- ◇ Chinook Middle School, new school
- ◇ Westgate Elementary, new-in-lieu
- ◇ Amon Creek Elementary, new school



The 2015 \$89.5 million Bond included 2 new elementary schools and 2 new-in-lieu elementary schools, plus 1 new middle school and 1 new-in-lieu middle school. Program scope included but was not limited to the following: budget development, debt service review, state assistance documentation, project building assessment, community inclusion, architect and consultant advertising and hiring, educational specification development, School Board approval, D-Form processing, construction bidding, contract review, contractor oversight, and complete project closeout. Scope additionally included land purchases and land swaps, coordination with the cities having jurisdiction, and new community infrastructure needs.

## 2009 Kennewick School District Bond Program

- ◇ Canyon View Elementary, remodel
- ◇ Cottonwood Elementary, new school
- ◇ Southgate Elementary, remodel
- ◇ Cascade Elementary, remodel
- ◇ Sunset View Elementary, remodel
- ◇ Lincoln Elementary, remodel



The 2009 \$68 Million Bond included one new elementary school and 5 elementary remodel projects. Program scope included but was not limited to the following: budget development, debt service review, state assistance documentation, project building assessment, community inclusion, architect and consultant advertisement and hiring, educational specification development, School Board approval, D-Form processing, construction bidding, contract review, contractor oversight and complete project closeout.



## 4. Overall Approach (quality control)

For pretty much all of the Owner’s we work for, Alliance is ultimately responsible for ensuring our owners get both a quality design and quality construction project. This assurance and control is delivered primarily through ensuring we hire the right people for the right project, giving those people all the information they need to do their work well, and holding them accountable. Ultimately its our job as the



Owner’s Agent and to ensure the right information and expectations are communicated well to the rest of the team. Additionally is our job to handle problems that arise if the design team or contractor are not meeting their contractual obligations. Weekly jobsite visits and attending the general contractor’s and subcontractor’s coordination meetings are a key to quality control.

## 5. Budget & Schedule Approach

Similar to Quality Control, we see understand that the Mater Budget and Master Schedule are our responsibility to set up correctly at the beginning of the project, and then manage judiciously throughout the project. Regarding the budget, when scope creep starts to happen from either the design team, or the owner, it’s our job to make sure the team understands the implications of the decisions being made. Similarly, when decisions are being made that might effect the schedule, it’s our job to make the issue clear to the group and help come up with alternative solutions and options.

## 6. Knowledge of Umatilla Market

After working with the Umatilla School District on the 2017 Bond Projects program, it became clear to us that the Umatilla Market is essentially just an extension of the Tri Cities market. Almost all of architects, general contractors, and subcontractors that work in the Tri Cities Market are all willing and able to do business in Umatilla.

## 8. Cost of Services

The table below represents the total estimated hours of involvement, from both Doug Carl and Earl Eastman, at each phase of the project, for all of the projects included in the Bond and described in the RFP. The durations are based on the RFP ad the hourly rate for all services included below is \$175.00.

Doug & Earl's Estimated Time Commitments			
Phase	Duration	Hours	Fee
Pre-construction & design	13 mos.	1280	\$211,400.00
Bidding & construction	18 mos.	1950	\$341,250.00
Closeout & warranty	12 mos.	260	\$45,500.00
Insurance and fuel costs (lump sum)			\$20,000.00

**Lump-sum not-to-exceed fee \$618,150.00**



## Earl Eastman Skill Summary

Over 20 years of Construction Project Management with both general contractors and subcontractors.

Team management & team building expertise.

Quality control/assurance program oversight.

Value engineering & constructability analysis.

Scheduling & estimating expertise.

GC/CM & CM/GC experience.

## Experience

### Principal

**Alliance Management & Construction Solutions, LLC - Kennewick, WA**      **2017-present**

Manage public procurement processes to hire general contractors

Hire specialty consultants and inspectors as needed

Responsible for quality assurance/control

Monitor all communications between design team and general contractor

Responsible for construction progress documentation

Make day-to-day decisions on behalf of School District as the Owner's Representative

Review & approve change order requests, pay applications, substitution requests, etc.

### Prior work experience

#### **Project Manager**

Balfour Beatty Construction—Umatilla, OR

2016-2017

#### **Operations Manager**

Bruce Mechanical, Inc.—Kennewick, WA

2013-2016

#### **Project Manager**

Bouten Construction—Kennewick, WA

2010-2013

#### **Project Manager**

Lydig Construction—Spokane, WA

2004-2010

## Reference for Earl Eastman

Earl has, or is currently, worked with all of the professional references listed below on K-12 projects:

### Municipal Owners

1. Pasco School District, Raul Sital—Assistant Superintendent, rsital@psd1.org, 509-543-6700. (multiple completed & ongoing projects)
2. Kennewick School District, Ryan Jones—Capital Projects Manager, ryan.jones@ksd.org, 509-222-6810. (multiple completed new construction and renovation projects)
3. Lone School District, Kevin Dinning—Superintendent, kevin.dinning@ionesd.org, 541-256-0509. (ongoing projects)
4. Pendleton School District, Michelle Jones—Director of Business Services, mjones@pendletonsd.org, 541-966-3259. (High School gym re-roofing project)

### Architects

1. MMEC Architects, Doug Mitchell, Principal, doug@mmeccarchitecture.com, 509-624-6800. (multiple large projects completed for Pasco and Kennewick School Districts)
2. Design West Architects, Brandon Wilm, Principal, bwilm@designwestwa.com, 509-783-2244. (multiple large projects completed for Pasco and Kennewick School Districts)
3. ALSC Architects, Ken Murphy, Principal, kmurphy@alscarchitects.com, 509-838-8568. (multiple large projects completed together for Kennewick School District)
4. Architects West, Ed Champagne—Principle, edc@architectswest.com, 208-661-8175. (ongoing projects)

### General Contractors

1. Chervenell Construction, Brandon Mayfield—Owner, bmayfield@chervenell.com, 509-727-1198. (multiple large new construction projects completed together in Pasco)
2. Fowler General Construction, Jeff Durfee—General Mgr., jeffd@fowlergc.com, 509-375-3331. (multiple large new construction projects completed together in Pasco)
3. Banlin Construction, Jasen Banta—Owner, jasen@banlinconstruction.com, 509-430-7311. (multiple large new construction projects completed)
4. Bouten Construction, Bill Bouten—Owner, billb@boutenconstruction.com, 509-535-3531. (multiple large new construction projects completed)



## Douglas M. Carl

### Principal

### Skill Summary

Project Management and long-range facility planning experience

Construction management experience

Over 30 years experience working with school districts, includes 10 years as a building administrator

Experienced in bid packaging, data analysis, budget building and evaluation strategies

Construction experience as a builder/owner

Proven record of successful long-term professional relationships, team building

## Experience

### Principal

**Alliance Management & Construction Solutions, LLC - Kennewick, WA** 2018-present

Project Director responsible for all pre-planning, design and construction of capital projects

Owner advocacy. Funding

Data analysis and long-term planning

Communications officer for owner and community stakeholders regarding plans and strategies

### Prior work experience

#### Director

Capital Projects & Planning, Kennewick School District - Kennewick, WA 2005-2018

#### Principal

Edison Elementary—Kennewick School District—Kennewick, WA 1998-2005

#### Assistant Principal

Desert Hills Middle School—Kennewick School District—Kennewick, WA 1995-1998

#### Co-Owner/Builder

Parkwood Construction—Kennewick, WA 1994-1998

## Reference for Doug Carl

Doug has successful large municipal construction projects with ALL of the individuals listed below:

### Municipal Owners

1. Pasco School District, Raul Sital—Assistant Superintendent, rsital@psd1.org, 509-543-6700. (multiple completed & ongoing projects)
2. City of Kennewick, John Noble—Management Services/Purchasing; john.nolbe@ci.kennewick.wa.us; 509.585.4813. (Toyota Center Ice Making Building)
3. Kennewick Fire Department, Chad Michael—Fire Chief; chad.michael@ci.kennewick.us; 509-585-4559. (Fire Stations 3 and 1)
4. Kennewick School District, Ryan Jones—Capital Projects Manager, ryan.jones@ksd.org, 509-222-6810. (multiple completed new construction and renovation projects)

### Architects

1. MMEC Architects, Doug Mitchell, Principal, doug@mmeccarchitecture.com, 509-624-6800. (multiple large projects completed for Pasco and Kennewick School Districts)
2. Design West Architects, Brandon Wilm, Principal, bwilm@designwestwa.com, 509-783-2244. (multiple large projects completed for Pasco and Kennewick School Districts)
3. ALSC Architects, Ken Murphy, Principal, kmurphy@alscarchitects.com, 509-838-8568. (multiple large projects completed together for Kennewick School District)
4. NAC Architecture, Keith Comes—Principal, kcomes@nacarchitecture.com, 509-838-8240.

### General Contractors

1. Chervenell Construction, Brandon Mayfield—Owner, bmayfield@chervenell.com, 509-727-1198. (multiple large new construction projects completed together in Pasco)
2. Fowler General Construction, Jeff Durfee—General Mgr., jeffd@fowlergc.com, 509-375-3331. (multiple large new construction projects completed together in Pasco)
3. Banlin Construction, Jasen Banta—Owner, jasen@banlinconstruction.com, 509-430-7311. (multiple large new construction projects completed)
4. Bouten Construction, Bill Bouten—Owner, billb@boutenconstruction.com, 509-535-3531. (multiple large new construction projects completed)

Appendix C

**UMATILLA SCHOOL DISTRICT**  
**Proposal to Provide Project Management Services**

Firm Contact Information

Firm Name: Alliance Management & Construction Solutions, LLC.  

---

Name of Contact Person Earl Eastman  

---

Address: 6855 W. Clearwater Ave. Suite A101 #161  

---

Kennewick, WA 99336  

---

Phone Number: 509-222-9800  

---

Email Address: [earl@alliancemcs.com](mailto:earl@alliancemcs.com)  

---

Facsimile:  

---

Firm Qualifications

*(Please attach additional pages as necessary.  
Subject to the 10-page limitation identified in the RFP)*

1.BACKGROUND

a Please describe the history of your firm **See attached proposal.**  

---

b Please describe your firm 's corporate mission and vision  
**Alliance Management & Construction Solutions is a business focused on providing the very best Construction Management & Owner's Representative services in the Inland Northwest.**  

---

c Please attach evidence of your Professional Liability Insurance Policy including a description of annual per claim and aggregate limits and any claims history in the last 5 years.  
**See the attached Certificate of Professional Liability Insurance.**

d. Please describe the nature and status of any claims, actions, or lawsuits made against your firm within the last five (5) years. Claims should be disclosed regardless of whether they involved litigation, arbitration, or other formal dispute resolution process. The disclosures required under this provision also apply to any claims arising out of services of any principal or officer of your firm or any member of the project team regardless of whether the person was associated with your firm at the time of the claim.

**Alliance Management & Construction Solutions has not had any claims in the last 5 years.**  

---

e. Please indicate whether your firm or any personnel have been involved in any litigation, arbitration or mediation, either as defendant or plaintiff, over the five (5) years immediately preceding the closing date of the RFP. If your firm or any personnel has been involved in any such litigation, arbitration or mediation, provide a general description of the cause or nature and status of each case or claim, and the identity of the client.

Alliance Management & Construction Solutions has not been involved in any litigation, arbitration, or mediation, in any form, in the last 5 years.

---

f. Please indicate whether your firm has ever been terminated [from a project, so please provide the name(s) and address(es) of the client(s) and the nature of the termination.

Alliance Management & Construction Solutions has never been terminated from a project.

---

## **2. PROJECT TEAM AND STAFFING**

a. Please describe your organizational approach to providing the Services.

See attached proposal.

---

b. Please describe current work load and priority of providing the Services as it relates to overall work load.

See attached proposal.

---

c. Please describe responsibilities of personnel assigned to provide the Services.

See attached proposal.

---

d. Please state whether your firm is capable of performing all Services described in this RFP and other Services recommended in the Proposal. If your firm intends to subcontract any of the Services to other consultants, the Proposal shall identify those consultants and describe the consultants' experience in providing the type of services covered by this RFP.

Alliance intends to provide all of the services described in this RFP.

---

e. If your firm has multiple locations, please identify the offices in which the various components will originate.

N/A – we only have one location.

---

f. Please attach a copies of resumes of kev personnel. See attached proposal.

## **3. RELATED EXPERIENCE**

a. Please describe your previous experience on similar projects. Specifically, provide your firm's history of providing similar Services on time and within budget and identify projects of similar scope and scale.

See attached proposal.

---

b. Please describe your firm's role in developing the budget, scope and schedule for each example and your firm's performance in achieving the budget, scope and schedule requirements for each.

See attached proposal.

---

c. Please provide a listing of all of your firm's lost or discontinued accounts in the State of Oregon within the last five years.

Alliance does not have any lost or discontinued accounts in the last 5 years.

---

d. Please describe your firm's previous experience administering and implementing Energy Trust of Oregon programs and projects. Specifically identify projects involving your firm's administration and implementation of Energy Trust of Oregon programs and projects.

See attached proposal.

---

e. Please describe your firm's experience leveraging rebate and incentive programs to supplement existing project funding. Specifically identify projects involving your firm's experience leveraging rebate and incentive programs to supplement existing project funding.

See attached proposal.

---

#### 4. OVERALL PROJECT APPROACH

a. Please describe your firm's knowledge and understanding of the Services and your overall approach to provide the Services. Discuss communication methods and techniques for interaction with the owners such as the District and other team members. Outline the elements of service delivery, including deliverables, which you philosophically embrace as being crucial to achieving a successful outcome for owners such as the District.

See attached proposal.

---

b. Please Describe your firm's quality control approach to each phase of the process.

See attached proposal.

---

c. Describe your firm's experience with project estimating and the process that would be used to provide Services of this scope.

Alliance provides master budget development assistance and utilizes prior project history to help our clients develop that budget. If project specific cost estimating is required as a part of the design scope verification, Alliance would typically recommend utilizing the CM/GC or a cost estimating consultant for this service.

---

d. Please describe any additional services not identified in this RFP that you believe to be necessary for successful completion of the Project. Please describe how the additional services would benefit the District, describe your firm 's ability to provide the additional services, and propose a cost for providing the additional services.

Depending on the project delivery method, the following services may be necessary and would be provided by consultants that Alliance would hire in behalf of the Umatilla School District: Constructability Review, Value Engineering Analysis, Cost Estimating Services, Commissioning Services, Special Inspections, Geotechnical Engineering, Surveying, Utility Locates, HAZMAT Surveying, HAZMAT Abatement Services, and other similar specialty service providers. .

**5. APPROACH TO SCHEDULE AND Budget**

a. Please describe your firm 's process for achieving budget and schedule adherence and your success rate for achieving such on projects in the last three years.

See attached proposal.

---

b. Please attach a duration-based preliminary schedule depicting major activities and milestones for each project element included in the Services and identifying any constraints that could affect your firm 's ability toperform the Services promptly and efficiently.

**6. AVAILABILITY TO AND FAMILIARITY WITH THE DISTRICT LOCALE**

a. Please describe your firm 's experience with project management services that are unique to the Project location, including but not limited to, soil conditions, climate, and weather-related considerations and how you will use that experience to benefit this project.

See attached proposal.

---

b. Provide information regarding your firm s knowledge of the local area and the unique aspects of the region and community that will influence your process.

See attached proposal.

---

**7. REFERENCES**

Please identify and provide contact information (school district name, contact name, phone number, and entail address) for all school districts for whom your firm currently provides services.

See attached proposal.

---

**8. COST OF SERVICES**

a. Please specify an estimated not-to-exceed amount for the Services: \_\_\_\_\_

b. Please attach your firm 's standard fee schedule for the Services (including the multiples of direct personnel expense, direct salaries, Consultants charges and reimbursable expenses).

See attached proposal.

Firm Name: Alliance Management & Construction Solutions, LLC.

Authorized Signatur  \_\_\_\_\_

Printed Name: Earl Eastman \_\_\_\_\_

Title: Principal \_\_\_\_\_

Date 3/24/23 \_\_\_\_\_

**Appendix C-1**

**CERTIFICATION OF NONDISCRIMINATION**

The undersigned Proposer is aware that, under ORS 279A.110, no Proposer who contracts with a public contracting agency may discriminate against minority, women, or emerging small business enterprises certified under ORS 200.055 or a business enterprise that is owned or controlled by or that employs a disabled veteran, as defined in ORS 408.225, in the awarding of subcontracts. Accordingly, the undersigned Proposer hereby certifies as part of its Proposal submission that it has not and will not discriminate against any minority, women, or emerging small business enterprises or a business enterprise that is owned or controlled by or that employs a disabled veteran in obtaining any of the required subcontracts for this project.

Firm Name Alliance Management & Construction Solutions

Authorized Signature 

Printed Name Earl Eastman

Title Principal

Date 3/24/2023

**Appendix C-2**

**PROPOSER RESIDENCY STATEMENT**

Pursuant to ORS 279A.120, Oregon’s reciprocal Preference Law, public contracting agencies shall, for the purposes of determining the lowest responsible bidder/proposer and the awarding of a contract, add a percent increase on the bid of a non-resident bidder/proposer equal to the percent, if any, of the preference given to that bidder/proposer in the state in which the bidder/proposer resides.

As defined in ORS 279A.120, “Resident Bidder/proposer” means a bidder/proposer that has paid unemployment taxes or income taxes in this state in the twelve calendar months immediately preceding submission of the bid, has a business address in this state, and has stated in the bid whether the bidder/proposer is a “Resident Bidder/proposer”. A “non-resident Bidder/proposer” is a bidder/proposer who does not meet the definition of a “Resident Bidder/proposer” as stated above.

Bidder/proposer/Proposer \_\_\_\_ IS/  X  IS NOT a “Resident Bidder/proposer” as set forth above.

2. If a Resident Bidder/proposer, enter your Oregon Business address below:

\_\_\_\_\_  
\_\_\_\_\_

3. If a Non-resident Bidder/proposer, enter state of residency:

Washington

Bidder/proposer/Proposer hereby certifies that the information provided is true and accurate.

Signature:  Date: 3/24/2024

Printed or Typed name: Earl Eastman

Title: Principal

Telephone: \_\_\_\_\_

Appendix C-3

**UMATILLA SCHOOL DISTRICT**  
**Acknowledgement of Addenda**

I/we have received and reviewed the RFP and any Addenda issued by the District and this submission is our entire proposal. Addenda Received:

Addendum No. \_\_\_\_\_ Date Received \_\_\_\_\_

Addendum No. \_\_\_\_\_ Date Received \_\_\_\_\_

Addendum No. \_\_\_\_\_ Date Received \_\_\_\_\_

Addendum No. \_\_\_\_\_ Date Received \_\_\_\_\_

Addendum No. \_\_\_\_\_ Date Received \_\_\_\_\_

If no addendum received write "None" \_\_\_\_\_

Firm Name Alliance Management & Construction Solutions

Authorized Signature  \_\_\_\_\_

Printed Name Earl Eastman \_\_\_\_\_

Title Principal \_\_\_\_\_

Date 3/24/2023 \_\_\_\_\_



# COPY

Wenaha Group Response to Request for Proposals

**Umatilla School District - Project Management Services**

# **2022 BOND ISSUE & SEISMIC RETROFIT GRANT**

March 24, 2023



# TABLE OF CONTENTS

## CERTIFICATIONS & ACKNOWLEDGMENTS:

Nondiscrimination | Completed Appendix C-1 Form

Resident Proposer | Completed Appendix C-2 Form

Addenda Acknowledgment | Completed Appendix C-3 Form

Completed Appendix C Form

## DESCRIPTION OF QUALIFICATIONS:

Cover letter

1.	Background	1
2.	Project Team & Staffing	3
3.	Related Experience	4
4.	Overall Project Approach	6
5.	Approach To Schedule & Budget	8
6.	Availability to & Familiarity with District Locale	9
7.	References	10
8.	Cost of Services	10
	Resumes	i

**Appendix C-1**

**CERTIFICATION OF NONDISCRIMINATION**

The undersigned Proposer is aware that, under ORS 279A.110, no Proposer who contracts with a public contracting agency may discriminate against minority, women, or emerging small business enterprises certified under ORS 200.055 or a business enterprise that is owned or controlled by or that employs a disabled veteran, as defined in ORS 408.225, in the awarding of subcontracts. Accordingly, the undersigned Proposer hereby certifies as part of its Proposal submission that it has not and will not discriminate against any minority, women, or emerging small business enterprises or a business enterprise that is owned or controlled by or that employs a disabled veteran in obtaining any of the required subcontracts for this project.

Firm Name Wenaha Group, Inc.

Authorized Signature 

Printed Name Robert A. Quaempts

Title President

Date 3/24/2023

**Appendix C-2**

**PROPOSER RESIDENCY STATEMENT**

Pursuant to ORS 279A.120, Oregon’s reciprocal Preference Law, public contracting agencies shall, for the purposes of determining the lowest responsible bidder/proposer and the awarding of a contract, add a percent increase on the bid of a non-resident bidder/proposer equal to the percent, if any, of the preference given to that bidder/proposer in the state in which the bidder/proposer resides.

As defined in ORS 279A.120, “Resident Bidder/proposer” means a bidder/proposer that has paid unemployment taxes or income taxes in this state in the twelve calendar months immediately preceding submission of the bid, has a business address in this state, and has stated in the bid whether the bidder/proposer is a “Resident Bidder/proposer”. A “non-resident Bidder/proposer” is a bidder/proposer who does not meet the definition of a “Resident Bidder/proposer” as stated above.

Bidder/proposer/Proposer  X  IS/      IS NOT a “Resident Bidder/proposer” as set forth above.


2. If a Resident Bidder/proposer, enter your Oregon Business address below:

125 SE Court Ave, Ste A   
 Pendleton, OR 97801

3. If a Non-resident Bidder/proposer, enter state of residency:

\_\_\_\_\_

Bidder/proposer/Proposer hereby certifies that the information provided is true and accurate.

Signature:    Date:  3/24/2023

Printed or Typed name:  Robert A. Quaempts

Title:  President

Telephone:  253.433.3995

**Appendix C-3**

**UMATILLA SCHOOL DISTRICT**  
**Acknowledgement of Addenda**

I/we have received and reviewed the RFP and any Addenda issued by the District and this submission is our entire proposal. Addenda Received:

Addendum No. \_\_\_\_\_ Date Received \_\_\_\_\_

Addendum No. \_\_\_\_\_ Date Received \_\_\_\_\_

Addendum No. \_\_\_\_\_ Date Received \_\_\_\_\_

Addendum No. \_\_\_\_\_ Date Received \_\_\_\_\_

Addendum No. \_\_\_\_\_ Date Received \_\_\_\_\_

If no addendum received write "None" \_\_\_\_\_

Firm Name Wenaha Group, Inc. \_\_\_\_\_

Authorized Signature  \_\_\_\_\_

Printed Name Robert A. Quaempts \_\_\_\_\_

Title President \_\_\_\_\_

Date 3/24/2023 \_\_\_\_\_

Appendix C

**UMATILLA SCHOOL DISTRICT**  
**Proposal to Provide Project Management Services**

Firm Contact Information

<u>Firm Name:</u>	Wenaha Group, Inc.
<u>Name of Contact Person:</u>	Scott Rogers
<u>Address:</u>	125 SE Court Ave, Ste A
	Pendleton, OR 97801
<u>Phone Number:</u>	541-969-9236
<u>Email Address:</u>	scottr@wenahagroup.com
<u>Facsimile:</u>	N/A

Firm Qualifications

(Please attach additional pages as necessary,  
subject to the 10-page limitation identified in the RFP)

**1. BACKGROUND**

a. Please describe the history of your firm:

Since its founding in 2010, some of Wenaha Group’s first and most significant projects have been based in Umatilla County. Wenaha Group has provided project management services for Umatilla School District including overseeing the District’s facilities assessment and Energy Trust of Oregon coordination. Comprised of over 35 full-time staff, Wenaha Group has five offices throughout Oregon, Washington State, and Arizona. Wenaha Group’s neighboring Pendleton office has four project managers and additional support from four project managers based out of the Kennewick, Washington office.

Wenaha Group is a S-Corporation and Native American-owned by Robert A. Quaempts. We are COBID-certified (#8606) as a Minority-Owned Business Enterprise (MBE) and Disadvantaged Business Enterprise (DBE).

b. Please describe your firm’s corporate mission and vision:

The 13 structural poles of a Columbia River basin tipi have inspired our Guiding Principles. These principles are infused into the foundation of every project and drive our team’s actions in all circumstances, from day-to-day tasks to strategic planning. The Guiding Principles are: the value of community; the potential of respect; the dignity of simplicity; the strength of diversity; the wisdom of economy; the influence of humility; the importance of balance; the joy of creating; the power of collaboration; the success of perseverance; the satisfaction of hard work; the worth of strong character; and the necessity of transparency.

c. Please attach evidence of your Professional Liability Insurance Policy, including a description of annual per claim and aggregate limits and any claims history in the last 5 years.

Attached. We have no claims in the last five (5) years.

d. Please describe the nature and status of any claims, actions, or lawsuits made against your firm within the last five (5) years. Claims should be disclosed regardless of whether they involved litigation, arbitration, or other formal dispute resolution process. The disclosures required under this provision also apply to any claims arising out of services of any principal or officer of your firm or any member of the project team regardless of whether the person was associated with your firm at the time of the claim.

Wenaha Group and our officers and project team do not have any claims, actions, or lawsuits within the last five (5) years.

*e. Please indicate whether your firm or any personnel have been involved in any litigation, arbitration or mediation, either as defendant or plaintiff, over the five (5) years immediately preceding the closing date of the RFP. If your firm or any personnel has been involved in any such litigation, arbitration or mediation, provide a general description of the cause or nature and status of each case or claim, and the identity of the client.*

Wenaha Group and our personnel do not have any litigation, arbitration or mediation, either as defendant or plaintiff within the five (5) years immediately preceding the closing date of the RFP.

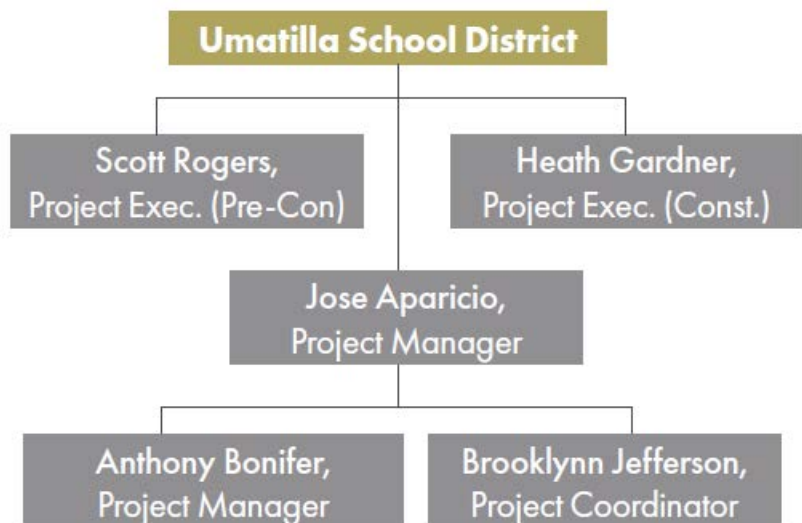
*f. Please indicate whether your firm has ever been terminated from a project. If so, please provide the name(s) and address(es) of the client(s) and the nature of the termination. \_*

Wenaha Group has never been terminated from a project.

**2. PROJECT TEAM AND STAFFING**

a. *Please describe your organizational approach to providing the Services.*

**An extension of Umatilla School District:** The projects will be managed day-to-day by Jose Aparicio. Jose will be supported by project manager Anthony Bonifer. Scott Rogers and Heath Gardner will provide project executive level oversight with Scott focused on preconstruction, design, procurement, and Energy Trust of Oregon facilitation. Heath will provide executive oversight when the projects move to construction. Rounding out the team is project coordinator Brooklynn Jefferson.



b. *Please describe current work load and priority of providing the Services as it relates to overall work load.*

Wenaha Group has been excited to support Umatilla School District and have taken great steps to ensure that the team is available and ready to “jump in” for the Vikings! Our ongoing projects are either recently completed or are wrapping up by Fall 2023.

Hermiston School District - 2019 Bond Program  
Wenaha Group Team: Scott, Jose, and Anthony  
Project Completion: Summer 2023

Walla Walla Public Schools - Bond Program  
Wenaha Group Team: Heath and Brooklynn  
Project Completion: February 2023

c. *Please describe responsibilities of personnel assigned to provide the Services.*

**Scott Rogers - Project Executive -  
Precon., & Energy Trust Facilitator**

- Pre-construction oversight
- Public procurement (as needed)
- Design management
- Budget tracking
- Special issue resolution

**Jose Aparicio - Project Manager**

- On site, day-to-day project management
- Quality management
- Budget and schedule management
- Design and construction oversight

**Heath Gardner - Project Executive -  
Construction**

- Construction administration oversight

**Anthony Bonifer - Project Manager**

- Construction administration assistance

**Brooklynn Jefferson - Project Coordinator**

- Assist with maintaining the budget and coordination of invoices and related documentation from contractors and other consultants

d. *Please state whether your firm is capable of performing all Services described in this RFP and other Services recommended in the Proposal. If your firm intends to subcontract any of the Services to other consultants, the Proposal shall identify those consultants and describe the consultants’ experience in providing the type of Services covered by this RFP.*

Wenaha Group’s team is equipped and adept to provide project management services associated with the design, regulatory compliance, permitting, and construction. We do not intend to subcontract any of the requested services to other consultants.

e. *If your firm has multiple locations, please identify the offices in which the various components will originate.*

Wenaha Group will support the District and the requested services with team members from our Pendleton, Oregon and Kennewick, Washington offices.

f. *Please attach a copies of resumes of key personnel.*

Attached and beginning on page i.

### **3. RELATED EXPERIENCE**

*a. Please describe your previous experience on similar projects. Specifically, provide your firm's history of providing similar Services on time and within budget and identify projects of similar scope and scale.*

All services were provided on time and on budget for the following similar projects that Wenaha Group managed. Hermiston School District Bond Project Management (\$92M); Pendleton School District Bond Program Management (\$60.3M); Corvallis School District, Bond Program Management (\$261M); Milton-Freewater Unified School District Bond Program Management (\$33.4M); Hood River County School District Bond Program Management (\$74M); Baker School District Bond Program Management (\$8M); Union School District Bond Program Management (\$11.5M); Umatilla County Jail Renovation (\$3.2M); Sherman County Courthouse Historic Rehabilitation & Expansion (\$9.3M).

*b. Please describe your firm's role in developing the budget, scope and schedule for each example and your firm's performance in achieving the budget, scope and schedule requirements for each.*

As the bond project manager for similar K-12 projects, Wenaha Group develops the budget, scope, and schedule and we have always met the budget, scope, and schedule requirements. Our team's proven process involves managing the bond program's concurrent project budgets and schedules with a comprehensive budgeting and cost forecasting tracking report. Wenaha Group's report gave all key stakeholders accurate, real time information on the cost detail of each individual project while also showing how each project effected the overall master bond budget.

*c. Please provide a listing of all of your firm's lost or discontinued accounts in the State of Oregon within the last five years.*

None.

*d. Please describe your firm's previous experience administering and implementing Energy Trust of Oregon programs and projects. Specifically identify projects involving your firm's administration and implementation of Energy Trust of Oregon programs and projects.*

We've long been a partner with the Energy Trust of Oregon (ETO), not just as a registered Trade Ally, but serving as a proponent of the mission and supporting its overall objectives. In fact, over the past five years, we have facilitated over \$2M in ETO incentive funds for our clients.

Wenaha Group's teams work closely with the ETO and the Oregon Department of Energy (ODOE) to maximize incentives and, if applicable, available Senate Bill (SB) 1149 funds. On most of our Oregon projects, we have coordinated ETO design assistance meetings, retro-commissioning, targeted measure audits, prescriptive and custom path ETO incentives, and solar studies. We've managed ETO programs for:

- Umatilla School District (2016 Energy Audits and Technical Studies)
- Hood River County School District
- Corvallis School District
- Hermiston School District
- Milton-Freewater Unified School District
- Enterprise School District
- Baker School District
- Pendleton School District
- Jefferson County School District #509J

*e. Please describe your firm’s experience leveraging rebate and incentive programs to supplement existing project funding. Specifically identify projects involving your firm’s experience leveraging rebate and incentive programs to supplement existing project funding.*

In addition to leveraging energy and efficiency related rebate and incentive programs, including the Energy Trust of Oregon and SB 1149, Wenaha Group is very well versed in incorporating the FCC E-Rate program into projects. As the projects are developed during the pre-construction process, Wenaha Group will work closely with the Design Team and the District’s IT and Finance teams to identify opportunities to leverage the E-Rate program, ensuring that the District’s bond projects can utilize the benefit of outside funding while improving students’ access to technology.

#### **4. OVERALL PROJECT APPROACH**

*a. Please describe your firm’s knowledge and understanding of the Services and your overall approach to provide the Services. Discuss communication methods and techniques for interaction with the owners such as the District and other team members. Outline the elements of service delivery, including deliverables, which you philosophically embrace as being crucial to achieving a successful outcome for owners such as the District.*

We embrace a collaborative, flexible, and transparent approach to project management. Wenaha Group’s project management approach will be rooted in the District’s bond program goals. We will start by reviewing the aspirational and instructional goals of the District and then work backwards, asking, “how do we incorporate the bond’s aspirational goals throughout the course of the project?”.

Keys to Wenaha Group’s project management approach:

- Establish and/or reaffirm project goals with the District. These goals will be pillars throughout the project and serve as our bond program “guiding principles”
- Embrace a collaborative, flexible, and transparent approach to project management
- Regular communication with stakeholders, including the District Administration, Board of Directors, and community members

Please see pages 6 and 7 of the 10-page proposal response for additional details about our approach.

*b. Please Describe your firm’s quality control approach to each phase of the process.*

Quality control is a continuous process, starting at the inception of the project and continuing through close-out. **Pre-Construction Document Review:** At each phase of design, we will meet with the design team to review constructability, budget, and quality. **Pre-Bid Meetings:** We will hold mandatory pre-bid meetings with all major trades to ensure expectations are clearly communicated well before bid time. **Pre-Installation Meetings:** Prior to subcontractors starting their work, we will conduct a pre-installation meeting, allowing review of applicable details, their responsibilities, and coordination with other trades. **Mockups:** When field work starts, we continuously compare the work to our agreed quality standards, which may include a visual mockup. **Quality Inspections:** We utilize a “punchlist as you go” process throughout the project. **Third-Party Inspections:** We recommend special inspection and testing, an envelope consultant, and commissioning agents. We will assist in the selection and management of these firms.

*c. Describe your firm’s experience with project estimating and the process that would be used to provide Services of this scope.*

Given our long history of comparable public education projects in the region, specifically in Umatilla County and the Tri-Cities, we have relevant, recent projects to draw costs upon for costing information. Additionally, Wenaha Group has strong, positive relationships with multiple Architectural/Engineering and General Contractor firms and can validate costs, explore market trends, constructability issues and discuss risks/opportunities so that we provide clear, concise direction to Umatilla School District regarding potential estimated project costs and ensure project success.

*d. Please describe any additional services not identified in this RFP that you believe to be necessary for successful completion of the Project. Please describe how the additional services would benefit the District, describe your firm's ability to provide the additional services, and propose a cost for providing the additional services.*

Other potential services that the District could consider would be Furniture, Fixtures and Equipment (FF&E) procurement and move assistance; Wenaha Group's FF&E Team is based out of Federal Way, WA and has provided this service to other K-12 Districts (i.e., Hermiston SD, Walla Walla PS, Corvallis SD) and it has been immensely beneficial. It is difficult to propose a cost, as it is really based upon the needs of the District and what potential collaboration can occur (i.e., the District can provide the move coordination but needs assistance in specifying and procuring classroom desks). We are glad to discuss this service further should the District be interested.

## **5. APPROACH TO SCHEDULE AND BUDGET**

*a. Please describe your firm's process for achieving budget and schedule adherence and your success rate for achieving such on projects in the last three years.*

Our process is based on the defining the project goals of the District, clear and concise communication, and an open, transparent process during design, estimating, and constructability review. Ensuring alignment with schedule and budget goals before starting construction sets the project up for success prior to even breaking ground. During construction, staying laser focused on schedule, effective and efficient construction administration, and an open dialog between team members is crucial to adhering to the established budget and schedule. Our team has consistently demonstrated our ability to deliver on time, on budget projects, including Hermiston School District, Walla Walla Public Schools, Kennewick School District, and several projects for the Confederated Tribes of the Umatilla Indian Reservation.

*b. Please attach a duration-based preliminary schedule depicting major activities and milestones for each project element included in the Services and identifying any constraints that could affect your firm's ability to perform the Services promptly and efficiently.*

Attached. Wenaha Group sees no constraints that could affect our ability to perform the services promptly and efficiently.

## **6. AVAILABILITY TO AND FAMILIARITY WITH THE DISTRICT LOCALE**

*a. Please describe your firm's experience with project management services that are unique to the Project location, including but not limited to; soil conditions, climate, and weather-related considerations and how you will use that experience to benefit this project.*

We recognize the challenges to construction that the December snowstorm, or the July thundershower, or that stubborn layer of caliche soil which runs through the building footprint, can impose on a project. Our team brings years of diverse project experience, with a strong focus on sharing our hard-learned lessons to benefit the District and the District's projects; we will sift through the geotechnical report to review soil conditions and ensure that any special considerations are discussed and factored into civil and excavation work. We pour over design documents, paying particular attention to the roofing, wall assembly and window details, ensuring that the design is appropriate for Umatilla. We know Umatilla County and we take great pride in delivering successful projects in what we consider "home."

*b. Provide information regarding your firm's knowledge of the local area and the unique aspects of the region and community that will influence your process.*

Our firm cannot be matched for knowledge of the local area – several team members live in Umatilla County, all are working on or have completed successful projects in western Umatilla County, and Project Manager Jose Aparicio is thrilled and honored for the opportunity to return to his hometown and deliver on the District's promises to the Umatilla community.

We bring the local knowledge, those shared values, that inspiration to support public education and an appreciation of what makes Umatilla special, to the District's bond program, and we feel it to be a privilege for the District to place its trust in us to deliver for the community.

**7. REFERENCES**

Please identify and provide contact information (school district name, contact name, phone number, and email address) for all school districts for whom your firm currently provides project management services.

**Hermiston School District**, Tricia Mooney, Ed.D., Superintendent, tricia.mooney@hermistonsd.org, 541.667.6000; **Walla Walla Public Schools**, Wade Smith, Ed.D., Superintendent, wsmith@wwps.org 509.526.6715; **Hood River County School District**, Rich Polkinghorn, Superintendent, rich.polkinghorn@hoodriver.k12.or.us, 541.387.5013; **Enterprise School District**, Thomas Crane, Interim Superintendent, tcrane@enterprise.k12.or.us, 541-426-3812; **Baker School District #5J**, Erin Lair, Superintendent, erin.lair@bakersd.org, 541-524-2260

**8. COST OF SERVICES**

a. *Please specify an estimated not-to-exceed amount for the Services:*

Wenaha Group is pleased to submit a not-to-exceed fee amount of ONE MILLION THIRTY-THREE THOUSAND FOUR HUNDRED AND SIXTY EIGHT DOLLARS (\$1,033,468) which is inclusive of Wenaha staff time (\$911,068) and authorized reimbursable expenses (\$122,400).

b. *Please attach your firm’s standard fee schedule for the Services (including the multiples of direct personnel expense, direct salaries, Consultants’ charges and reimbursable expenses).*

Attached.

Firm Name Wenaha Group, Inc. \_\_\_\_\_

Authorized Signature  \_\_\_\_\_

Printed Name Robert A. Quaempts \_\_\_\_\_

Title President \_\_\_\_\_

Date 3/24/2023 \_\_\_\_\_



# PRELIMINARY SCHEDULE

Wenaha Group sees no constraints that could affect our ability to perform the services promptly and efficiently.

	2023				2024				2025			
	Q1	Q2	Q3	Q4	Q1	Q2	Q3	Q4	Q1	Q2	Q3	Q4
<b>Design</b>												
<b>Construction</b>												
<b>Milestone</b>												
<b>CBMS - Seismic</b>		Design	Design	Design	Construction	Construction	Construction					
Plan Rev. / Permit.				Milestone								
Bidding					Milestone							
Const. Closeout							Milestone	Milestone				
<b>New CTE/STEM @ UHS</b>		Design	Design	Design	Construction	Construction	Construction	Construction				
Plan Rev. / Permit.				Milestone								
Bidding					Milestone							
Const. Closeout								Milestone	Milestone			
<b>New 4-6 School @ S. Hill</b>		Design	Design	Design	Design	Construction	Construction	Construction	Construction	Construction	Construction	
Plan Rev. / Permit.				Milestone	Milestone							
Bidding					Milestone							
Const. Closeout											Milestone	Milestone
<b>MHES - Renovations</b>					Design	Construction	Construction					
Plan Rev. / Permit.					Milestone							
Bidding						Milestone						
Const. Closeout								Milestone	Milestone			
<b>UHS Shop - Renovations</b>					Design	Construction	Construction					
Plan Rev. / Permit.					Milestone							
Bidding						Milestone						
Const. Closeout								Milestone	Milestone			

# STANDARD FEE SCHEDULE



In alignment with our Guiding Principles, specifically, “the necessity of transparency” and “the dignity of simplicity”, Wenaha Group is always open and transparent in discussing the Cost of Services; we are supportive of staffing based upon the best interests of both the Client and the project. Our approach to this process is straightforward – how many hours do we think our team will need to successfully support the project, and simply apply those hours against our established Hourly Rate Schedule. We are not including any subconsultants in our proposal, however should the District request Wenaha Group to add a subconsultant for additional or augmented services, it would be at the subconsultant cost plus a 10% mark-up.

<b>Role</b>	<b>2023 Hourly Rate</b>
Project Executive (PX)	\$218.00
Project Manager 3 (PM-3)	\$165.00
Project Manager 2 (PM-2)	\$145.00
Project Coordinator	\$77.50

# COVER LETTER - COPY



March 24, 2023

125 SE Court Ave, Ste A  
Pendleton, OR 97801

Attn: Heidi Sipe, Superintendent  
Umatilla School District  
1001 6th Street, Umatilla, OR 97882

**RE: Request for Proposal - Project Management Services for the 2022 Bond Issue and Seismic Retrofit Grant**

Dear Ms. Sipe and Selection Committee Members,

We are extremely grateful for this opportunity to present our proposal for Project Management Services. We do not take this opportunity lightly and acknowledge how much the success of this project will impact the future of Umatilla. Therefore, it is important for you to know that you will have our full commitment to work tirelessly, collaboratively, and transparently throughout the process. We are proud of what was accomplished during our involvement with your 2021 pre-bond process and are looking forward to putting our knowledge gained to your benefit during the post bond process.

Wenaha Group is uniquely qualified to best serve your needs. As proven project management providers and members of your community, our team offers the following benefits and project understanding for Umatilla School District:

- **Familiarity with Umatilla School District and Community:** Our proposal features a familiar face. Jose Aparicio who grew up in Umatilla and is a proud 2001 graduate of Umatilla High School, will lead the post bond process for Umatilla School District. He will be supported by Scott Rogers who helped facilitate the facility condition assessment in preparation for this bond passage, and Heath Gardner who was the Wenaha Group team member who led the long-range facility planning component of the pre-bond process. No other firm has such a deep understanding of your facilities, staff, students, and community.
- **Unmatched Regional K-12 Experience:** Wenaha Group understands the challenges facing the region's K-12 providers. Each of our team members brings a unique perspective gained by long and continuous involvement in our educational community.
- **Seasoned and Diverse Staff:** Our team's expertise is robust and features construction professionals, as well as regional experts in public procurement and contracting, instructional technology, K-12 funding and grant writing, and Oregon's energy incentive programs. We are ready to put these services and skill sets to work to develop resilient and future-ready learning environments.
- **Commitment, Accountability, and Availability:** We live and work in this regional community. Our personal and professional lives are interconnected with yours. Our success is dependent on your success in very specific ways. Simply put, we can't afford to mess up.

As a long-standing member of this regional community, we've been so impressed by what Umatilla has accomplished and are humbled at the possibility of becoming part of your hardworking and impactful team.

Sincerely,

A handwritten signature in blue ink that reads "Robert A. Quaempts".

Robert A. Quaempts, President  
Wenaha Group, Inc.

E: robq@wenahagroup.com | C: 253.433.3995

*By signing this cover letter, Wenaha Group, Inc. intends to be bound by the terms and conditions specified in the subject RFP and our proposal herein.*

# 1. BACKGROUND

## Wenaha Group's Project Management Services

### A. FIRM HISTORY

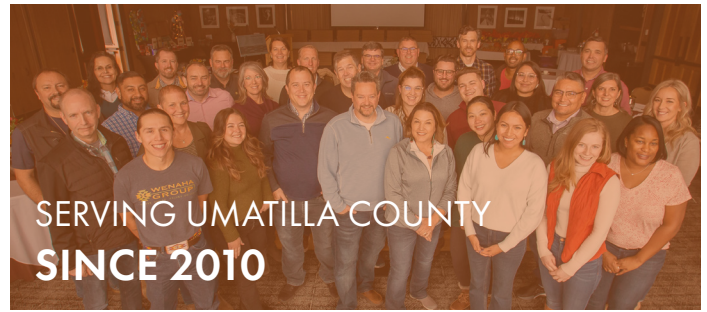
Since its founding in 2010, some of Wenaha Group's first and most significant projects have been based in Umatilla County. Wenaha Group has provided project management services for Umatilla School District including overseeing the District's facilities assessment and Energy Trust of Oregon coordination.

Comprised of over 35 full-time staff, Wenaha Group has five offices throughout Oregon, Washington State, and Arizona. Wenaha Group's neighboring Pendleton office has four project managers and additional support from four project managers based out of the Kennewick, Washington office.

Wenaha Group is a S-Corporation and Native American-owned by Robert A. Quaempts. We are COBID-certified (#8606) as a Minority-Owned Business Enterprise (MBE) and Disadvantaged Business Enterprise (DBE).

### B. CORPORATE MISSION AND VISION

The 13 structural poles of a Columbia River basin tipi have inspired our Guiding Principles. These principles are infused into the foundation of every project and drive our team's actions in all circumstances, from day-to-day tasks to strategic planning.



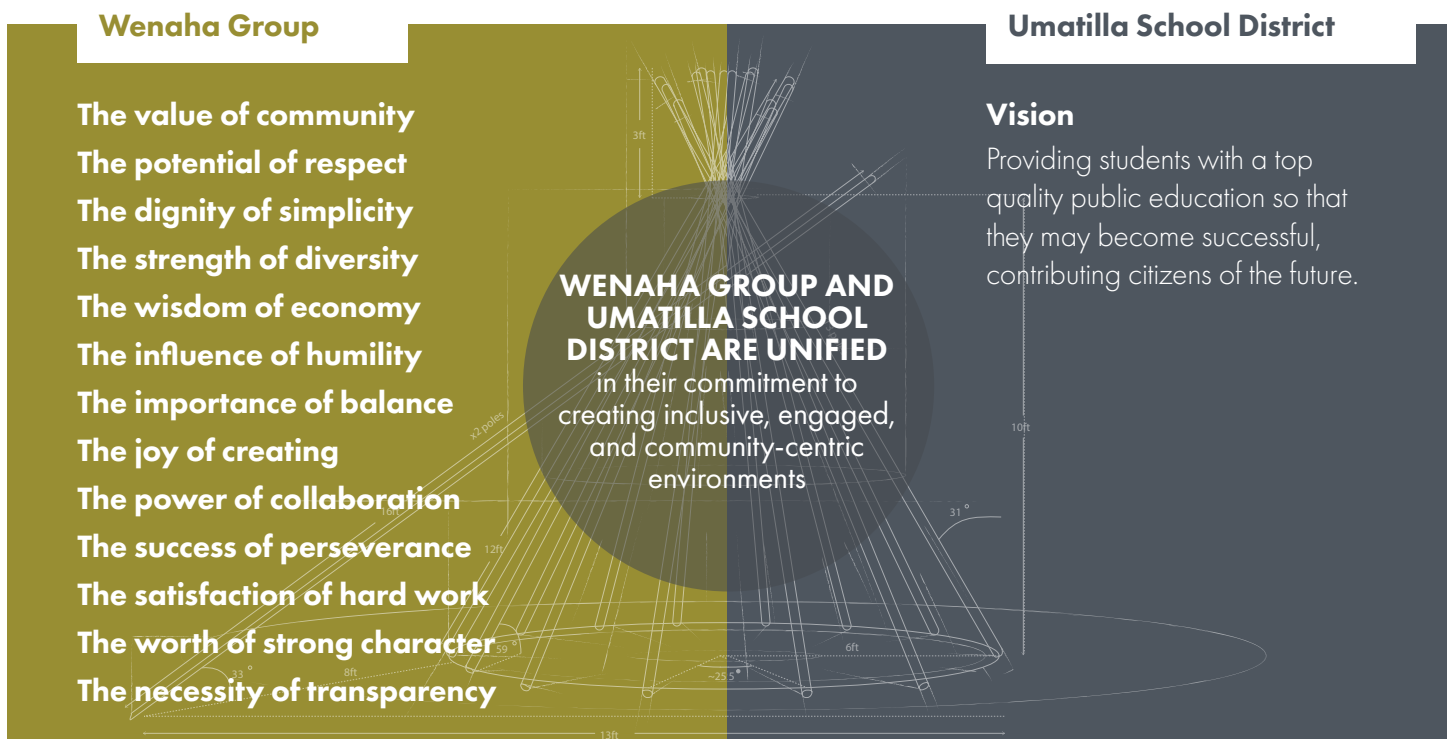
### → AREAS OF SPECIALIZATION:

- Master Planning
- Master Budget
- Design Coordination
- Cost Estimating
- Procurement Management and Support
- Quality Control
- Change Order Management
- Value Engineering
- Constructability Review

### ADDITIONAL SERVICES:

- FF&E and Move Management
- Community Engagement and Outreach Facilitation

*As per the RFP, this proposal is in alignment with ORS 279A.120, ORS 279A.125, and ORS 282.210, and has been printed in Oregon on recycled paper.*



### Wenaha Group

- The value of community
- The potential of respect
- The dignity of simplicity
- The strength of diversity
- The wisdom of economy
- The influence of humility
- The importance of balance
- The joy of creating
- The power of collaboration
- The success of perseverance
- The satisfaction of hard work
- The worth of strong character
- The necessity of transparency

### Umatilla School District

#### Vision

Providing students with a top quality public education so that they may become successful, contributing citizens of the future.

## C. EVIDENCE OF PROFESSIONAL LIABILITY INSURANCE POLICY



**Local & Ready  
to Go**

Our proposed project team is based out of our Pendleton and Kennewick offices to provide localized services.

		WENAGRO-01		LVASUPALLI			
<b>CERTIFICATE OF LIABILITY INSURANCE</b>							
THIS CERTIFICATE IS ISSUED AS A MATTER OF INFORMATION ONLY AND CONFERS NO RIGHTS UPON THE CERTIFICATE HOLDER. THIS CERTIFICATE DOES NOT AFFIRMATIVELY OR NEGATIVELY AMEND, EXTEND OR ALTER THE COVERAGE AFFORDED BY THE POLICIES BELOW. THIS CERTIFICATE OF INSURANCE DOES NOT CONSTITUTE A CONTRACT BETWEEN THE ISSUING INSURER(S), AUTHORIZED REPRESENTATIVE OR PRODUCER, AND THE CERTIFICATE HOLDER.							
IMPORTANT: If the certificate holder is an ADDITIONAL INSURED, the policy(ies) must have ADDITIONAL INSURED provisions or be endorsed. If SUBROGATION IS WAIVED, subject to the terms and conditions of the policy, certain policies may require an endorsement. A statement on this certificate does not confer rights to the certificate holder in lieu of such endorsement(s).							
PRODUCER Hub International Northwest LLC P.O. Box 2528 Tri-Cities, WA 99302		CONTACT NAME: PHONE (A/C, No, Ext): (509) 545-3800      FAX (A/C, No): (509) 547-7960 E-MAIL: ADDRESS:					
INSURED		INSURER(S) AFFORDING COVERAGE		NAIC #			
Wenaha Group Inc 505 S 336th Street, Ste. 630 Federal Way, WA 98003		INSURER A : Liberty Surplus Insurance Corporation		10725			
		INSURER B : West American Insurance Co		44393			
		INSURER C : Commerce & Industry Insurance Company		19410			
		INSURER D : Indian Harbor Insurance Company		36940			
		INSURER E :					
INSURER F :							
<b>COVERAGES</b>		<b>CERTIFICATE NUMBER:</b>		<b>REVISION NUMBER:</b>			
THIS IS TO CERTIFY THAT THE POLICIES OF INSURANCE LISTED BELOW HAVE BEEN ISSUED TO THE INSURED NAMED ABOVE FOR THE POLICY PERIOD INDICATED. NOTWITHSTANDING ANY REQUIREMENT, TERM OR CONDITION OF ANY CONTRACT OR OTHER DOCUMENT WITH RESPECT TO WHICH THIS CERTIFICATE MAY BE ISSUED OR MAY PERTAIN, THE INSURANCE AFFORDED BY THE POLICIES DESCRIBED HEREIN IS SUBJECT TO ALL THE TERMS, EXCLUSIONS AND CONDITIONS OF SUCH POLICIES. LIMITS SHOWN MAY HAVE BEEN REDUCED BY PAID CLAIMS.							
INSR LTR	TYPE OF INSURANCE	ADDL INSD	SUBR WVD	POLICY NUMBER	POLICY EFF (MM/DD/YYYY)	POLICY EXP (MM/DD/YYYY)	LIMITS
A	<input checked="" type="checkbox"/> COMMERCIAL GENERAL LIABILITY <input type="checkbox"/> CLAIMS-MADE <input checked="" type="checkbox"/> OCCUR  GEN'L AGGREGATE LIMIT APPLIES PER: <input checked="" type="checkbox"/> POLICY <input type="checkbox"/> PRO-JECT <input type="checkbox"/> LOC <input checked="" type="checkbox"/> OTHER: <b>Employers Liability</b>	X	X	1000529018	4/11/2022	4/11/2023	EACH OCCURRENCE \$ <b>1,000,000</b> DAMAGE TO RENTED PREMISES (Ea occurrence) \$ <b>50,000</b> MED EXP (Any one person) \$ <b>Excluded</b> PERSONAL & ADV INJURY \$ <b>1,000,000</b> GENERAL AGGREGATE \$ <b>2,000,000</b> PRODUCTS - COMP/OP AGG \$ <b>2,000,000</b> WA Stop Gap \$ <b>1,000,000</b>
B	AUTOMOBILE LIABILITY <input checked="" type="checkbox"/> ANY AUTO OWNED AUTOS ONLY <input type="checkbox"/> SCHEDULED AUTOS <input checked="" type="checkbox"/> HIRED AUTOS ONLY <input checked="" type="checkbox"/> NON-OWNED AUTOS ONLY	X	X	BAW55109350	4/11/2022	4/11/2023	COMBINED SINGLE LIMIT (Ea accident) \$ <b>1,000,000</b> BODILY INJURY (Per person) \$ BODILY INJURY (Per accident) \$ PROPERTY DAMAGE (Per accident) \$ \$ \$
C	<input type="checkbox"/> UMBRELLA LIAB <input checked="" type="checkbox"/> OCCUR <input checked="" type="checkbox"/> EXCESS LIAB <input type="checkbox"/> CLAIMS-MADE DED <input checked="" type="checkbox"/> RETENTION \$ <b>0</b>			EBU034254625	4/11/2022	4/11/2023	EACH OCCURRENCE \$ <b>2,000,000</b> AGGREGATE \$ <b>2,000,000</b> \$
	WORKERS COMPENSATION AND EMPLOYERS' LIABILITY ANY PROPRIETOR/PARTNER/EXECUTIVE OFFICER/MEMBER EXCLUDED? (Mandatory in NH) <input type="checkbox"/> Y <input checked="" type="checkbox"/> N / A If yes, describe under DESCRIPTION OF OPERATIONS below						PER STATUTE    OTH-ER E.L. EACH ACCIDENT \$ E.L. DISEASE - EA EMPLOYEE \$ E.L. DISEASE - POLICY LIMIT \$
D	Professional/Polluti			PEC005400103	4/11/2022	4/11/2023	Deductible: \$25,000 <b>3,000,000</b>
DESCRIPTION OF OPERATIONS / LOCATIONS / VEHICLES (ACORD 101, Additional Remarks Schedule, may be attached if more space is required)							
CERTIFICATE HOLDER				CANCELLATION			
				SHOULD ANY OF THE ABOVE DESCRIBED POLICIES BE CANCELLED BEFORE THE EXPIRATION DATE THEREOF, NOTICE WILL BE DELIVERED IN ACCORDANCE WITH THE POLICY PROVISIONS.			
				AUTHORIZED REPRESENTATIVE 			
ACORD 25 (2016/03)				© 1988-2015 ACORD CORPORATION. All rights reserved.			
The ACORD name and logo are registered marks of ACORD							

## D. CLAIMS, ACTIONS, LAWSUITS

Wenaha Group and our officers and project team do not have any claims, actions, or lawsuits within the last five (5) years.

## E. LITIGATION, ARBITRATION, OR MEDIATION

Wenaha Group and our personnel do not have any litigation, arbitration or mediation, either as defendant or plaintiff within the five (5) years immediately preceding the closing date of the RFP.

## F. FIRM TERMINATION

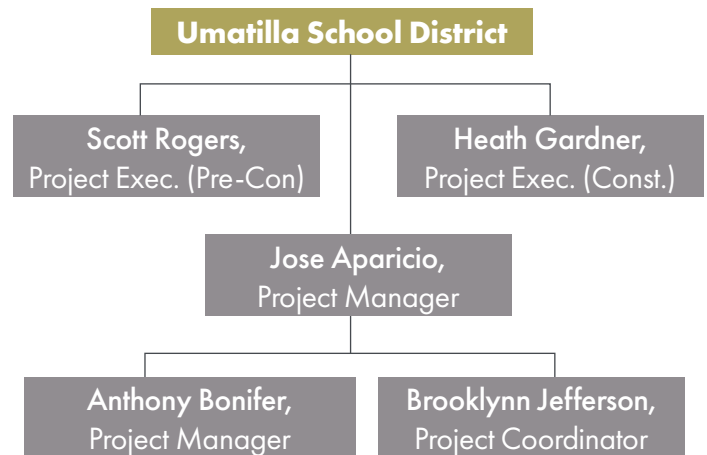
Wenaha Group has never been terminated from a project.

# 2. PROJECT TEAM & STAFFING

## A. ORGANIZATIONAL APPROACH

### *An extension of Umatilla School District*

The projects will be managed day-to-day by Jose Aparicio. Jose will be supported by project manager Anthony Bonifer. Scott Rogers and Heath Gardner will provide project executive level oversight with Scott focused on preconstruction, design, procurement, and Energy Trust of Oregon facilitation. Heath will provide executive oversight when the projects move to construction. Rounding out the team is project coordinator Brooklynn Jefferson.



## B. CURRENT WORKLOAD AND PROJECT PRIORITY

Wenaha Group has been excited to support Umatilla School District and have taken great steps to ensure that the team is available and ready to “jump in” for the Vikings! Our ongoing projects are either recently completed or are wrapping up by Fall 2023.

### **Hermiston School District - 2019 Bond Program**

Wenaha Group Team: Scott, Jose, and Anthony  
Project Completion: Summer 2023

### **Walla Walla Public Schools - Bond Program**

Wenaha Group Team: Heath and Brooklynn  
Project Completion: February 2023

## C. RESPONSIBILITIES OF KEY PERSONNEL

### **Scott Rogers**

**Project Executive - Precon., & Energy Trust Facilitator**

- Pre-construction oversight
- Public procurement (as needed)
- Design management
- Budget tracking
- Special issue resolution

### **Heath Gardner**

**Project Executive - Construction**

- Construction administration oversight

### **Jose Aparicio**

**Project Manager**

- On site, day-to-day project management
- Quality management
- Budget and schedule management
- Design and construction oversight

### **Anthony Bonifer**

**Project Manager**

- Construction administration assistance

### **Brooklynn Jefferson**

**Project Coordinator**

- Assist with maintaining the budget and coordination of invoices and related documentation from contractors and other consultants

## D. CAPABILITY TO PERFORM

Wenaha Group’s team is equipped and adept to provide project management services associated with the design, regulatory compliance, permitting, and construction related to the District’s 2022 Bond Issue and Seismic Retrofit Grant Projects. Wenaha Group **does not** intend to subcontract any of the requested services to other consultants.

Additional Wenaha Group resources include:

- Licensed architects on staff
- Energy Trust of Oregon expertise
- Furniture, Fixtures, and Equipment (FF&E) procurement and move assistance/coordination services

## E. OFFICE LOCATION FOR COMPONENTS

Wenaha Group will support the District and the requested services with team members from our Pendleton, Oregon and Kennewick, Washington offices.

# 3. RELATED EXPERIENCE

A. EXPERIENCE ON SIMILAR PROJECTS & B. BUDGET, SCOPE & SCHEDULE DEVELOPMENT/PERFORMANCE

Project Name	Project Budget	Project Outcomes	Bond Management	PreK-12 Facility	Alternative Delivery (CM/GC or Design-Build)	Energy Trust Coordination	Local Project
Hermiston School District Bond Project Management - Hermiston, OR	\$92 Million	On time/on budget	●	●		●	●
Pendleton School District Bond Program Management - Pendleton, OR	\$60.3 Million	On time/on budget	●	●	●	●	●
Corvallis School District, Bond Program Management - Corvallis, OR	\$261 Million	Ongoing	●	●	●	●	
Milton-Freewater Unified School District Bond Program Management - Milton-Freewater, OR	\$33.4 Million	On time/on budget	●	●	●	●	●
Hood River County School District Bond Program Management - Hood River, OR	\$74 Million	On time/on budget	●	●	●		
Baker School District Bond Program Management - Baker City, OR	\$8 Million (includes State match)	On time/on budget	●	●	●	●	
Union School District Bond Program Management - Union, OR	\$11.5 Million	On time/on budget	●	●	●		
Umatilla County Jail Renovation - Umatilla, OR	\$3.2 Million	Ongoing - Complete Winter 2023					●
Sherman County Courthouse Historic Rehabilitation & Expansion - Moro, OR	\$9.3 Million	On time/on budget			●	●	

## A. EXPERIENCE ON SIMILAR PROJECTS & B. BUDGET, SCOPE & SCHEDULE DEVELOPMENT/PERFORMANCE



### Hermiston School District Bond Project Management

Wenaha Group is the project manager for the 2019 capital improvement program which included two new prototype elementary schools, demolition of an existing elementary school, a standalone High School Annex classroom building, a new high school softball facility, and various district-wide upgrades. Much of the work has occurred within occupied school sites and required meticulous planning and communication. Wenaha Group developed and met the budget, scope, and schedule.

**Project Budget:** \$92 Million

**Completed:** ESs: 8/22; HS: 7/23; Dist.-wide: 8/24

**Delivery Method:** Design-Bid-Build

### Milton-Freewater Unified School District Bond Project Management

Wenaha Group provided pre-bond services which included facilities assessment, cost estimating for various facility improvement options and new construction, as well as communication and community outreach assistance. Projects under the 2016 bond program include a new 75,000 SF elementary school, converting an existing elementary school into an athletic complex, relocation of the existing transportation facility and construction of a new transportation, maintenance and food services office, as well as upgrades to several other district facilities. Wenaha Group developed and met the budget, scope, and schedule.

**Project Budget:** \$33.4 Million

**Completed:** 2019

**Delivery Method:** CM/GC



### Hood River County School District Bond Project Management

Wenaha Group's project management services team oversaw this complex, multi-site, and concurrent project bond program that addresses significant needs at every district facility. To stretch the bond dollars as far as possible, Wenaha Group developed a comprehensive program that included eight separate bid packages, two design firms, and four different contractors using three different project delivery methods.

The team managed the bond program's concurrent project budgets and schedules by developing a comprehensive budgeting and cost forecasting tracking report. Wenaha Group's report gave all key stakeholders accurate, real time information on the cost detail of each individual project while also showing how each project effected the overall master bond budget.

Additionally, our team helped the District maximize their funds through navigating the complicated SB1149 grant and Energy Trust of Oregon incentive programs in addition to obtaining and managing multiple grants for seismic upgrades.

**Project Budget:** \$74 Million

**Completed:** 2019

**Delivery Method:** CM/GC

## C. LOST OR DISCONTINUED OR ACCOUNTS

None.

## ENERGY TRUST OF OREGON - RESULTS

**\$2+ Million**

Energy incentives issued to our clients in the last five years

**We're an Ally**

Wenaha Group is officially registered as an Energy Trust Trade Ally



### Energy Trust of Oregon PROJECT EXAMPLES

#### HOOD RIVER COUNTY SCHOOL DISTRICT

Wenaha Group helped enhance the District's bond funds by over \$170,000 from the ETO and over \$450,000 from SB1149.

#### CORVALLIS SCHOOL DISTRICT

We're on track to receive over \$640,000 from ETO and \$1.35M from SB1149. This is possible because of our strong relationship and experience working with both the Existing Buildings and New Buildings divisions of the Energy Trust of Oregon.

#### D. ENERGY TRUST OF OREGON EXPERIENCE

We've long been a partner with the Energy Trust of Oregon (ETO), not just as a registered Trade Ally, but serving as a proponent of the mission and supporting its overall objectives. In fact, over the past five years, we have facilitated over \$2M in ETO incentive funds for our clients.

Wenaha Group's teams work closely with the ETO and the Oregon Department of Energy (ODOE) to maximize incentives and, if applicable, available Senate Bill (SB) 1149 funds. On most of our Oregon projects, we have coordinated ETO design assistance meetings, retro-commissioning, targeted measure audits, prescriptive and custom path ETO incentives, and solar studies.

**Wenaha Group has deep experience in managing projects including Energy Trust of Oregon programs, including:**

- Umatilla School District (2016 Energy Audits and Technical Studies)
- Hood River County School District
- Corvallis School District
- Hermiston School District
- Milton-Freewater Unified School District
- Enterprise School District
- Baker School District
- Pendleton School District
- Jefferson County School District #509J

#### E. REBATE & INCENTIVE PROGRAM EXPERIENCE

In addition to leveraging energy and efficiency related rebate and incentive programs, including the Energy Trust of Oregon and SB1149, Wenaha Group is very well versed in incorporating the FCC E-Rate program into projects. As the projects are developed during the pre-construction process, Wenaha Group will work closely with the Design Team and the District's IT and Finance teams to identify opportunities to leverage the E-Rate program, ensuring that the District's bond projects can utilize the benefit of outside funding while improving students' access to technology.

## 4. OVERALL PROJECT APPROACH

### A. KNOWLEDGE & UNDERSTANDING OF SERVICES

We embrace a collaborative, flexible, and transparent approach to project management. Wenaha Group's project management approach will be rooted in the District's bond program goals. We will start by reviewing the aspirational and instructional goals of the District and then work backwards, asking, "how do we incorporate the bond's aspirational goals throughout the course of the project?"

**Keys to Wenaha Group's project management approach:**

- Establish and/or reaffirm project goals with the District. These goals will be pillars throughout the project and serve as our bond program "guiding principles"
- Embrace a collaborative, flexible, and transparent approach to project management
- Regular communication with stakeholders, including the District Administration, Board of Directors, and community members

**Master Budget:** The master budget will be detailed cooperatively with the District and design team, and used to monitor overall costs and determine priorities as the program progresses. As a living document, it is tailored to track various funding sources and evolving project estimates, while supporting transparency, and demonstrating good stewardship of tax dollars.

**Master Bond Schedule and Construction Schedules:** Parallel with the master budget creation, a master bond schedule will be developed to reflect any specific limitations and requirements, including budgeting and design phase activities (i.e., review periods, Owner approvals, and permits). Once general contractors are selected, we will participate in the creation of detailed construction schedules for each phase of the program. Each week during construction, the contractor will be required to create a short-term schedule that will break the work down further and become a key monitoring and sequencing tool that will be used by the whole team.

**Design Coordination:** We will work closely with the architectural teams to facilitate the necessary design meetings with District stakeholders. Part of design must include consideration of the end users and how the building will be maintained. We will work with the maintenance team and key stakeholders for input on material and system selections. Value engineering is continually performed during the process to optimize design to performance and overall program goals.

**Procurement Management and Support:** The construction climate is intense. Our team will work with the District and design team to determine the appropriate procurement strategies for each project. The District's bond program is large and diverse enough to explore multiple different procurement approaches including:

### BIDDING STRATEGIES - CM/GC

- Outreach to network of existing industry connections
- Pursuing bidders through their supply chains
- Design the project to fit the Umatilla County and broader regional subcontractor pool and workforce

### BIDDING STRATEGIES - DESIGN-BID-BUILD

- Personal invitations to firms with existing relationships
- Leveraging industry and trade association connections such as Associated General Contractors (AGC), the Construction Specifications Institute (CSI), and various labor organizations

## B. QUALITY CONTROL

Quality control is a continuous process, starting at the inception of the project and continuing through close-out.

**Pre-Construction Document Review:** At each phase of design, we will meet with the design team to review constructability, budget, and quality.

## A JOSE SPECIALTY



### SCHEDULE MANAGEMENT

One of the most common roadblocks to quality is when trades are not allowed enough time in the schedule or are not correctly sequenced. Jose and the Wenaha Group team will closely monitor the project schedule and continuously communicate with the contractors to avoid delays near the end of a project when quality too often takes a back seat to the schedule.

**Pre-Bid Meetings:** We will hold mandatory pre-bid meetings with all major trades to ensure expectations are clearly communicated well before bid time. This is also a great opportunity to get feedback from subcontractors on complicated aspects of the project.

**Pre-Installation Meetings:** Prior to subcontractors starting their work, we will conduct a pre-installation meeting, allowing review of applicable details, their responsibilities, and coordination with other trades.

**Mockups:** When field work starts, we continuously compare the work to our agreed quality standards. Often, we will require subcontractors to complete mock-ups which are retained throughout construction to provide a visible standard of quality.

**Quality Inspections:** We utilize a "punchlist as you go" process throughout the project. Any deficiencies observed will be communicated to the contractor verbally while also being formally documented in the QA/QC section of our project management software. This proactive approach allows teams to address items in real time to save time and improve the overall project quality.

**Third-Party Inspections:** Construction is a complicated process and it is a good investment to hire specialized firms to ensure the building performs as intended—we recommend special inspection and testing, an envelope consultant, and commissioning agents. We will assist in the selection and management of these firms.

## C. PROJECT ESTIMATING

Given our long history of comparable K-12 projects in the region, we have relevant, recent projects to inform cost estimating. We also consult our network to validate costs, explore market trends, constructability issues, and discuss risks/opportunities.

## D. ADDITIONAL SERVICES

We also provide Furniture, Fixtures and Equipment (FF&E) procurement and move assistance. We have provided this service to several other school districts.

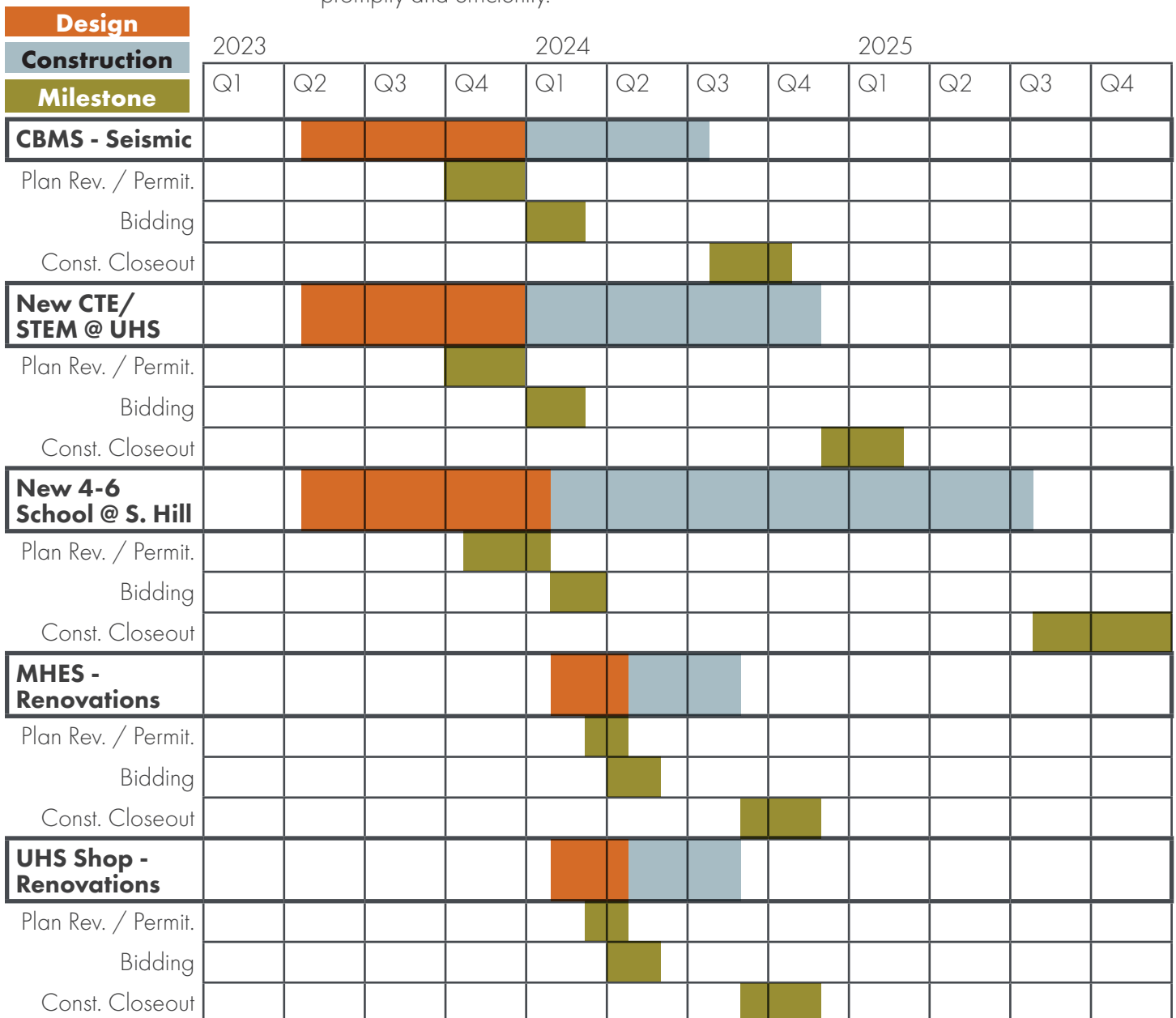
# 5. APPROACH TO SCHEDULE & BUDGET

## A. PROCESS FOR ADHERENCE

Our process for achieving budget and schedule adherence is based on the defining the project goals of the District, clear and concise communication, and an open, transparent process during design, estimating, and constructability review. Ensuring alignment with schedule and budget goals before starting construction sets the project up for success prior to even breaking ground. During construction, staying laser focused on schedule, effective and efficient construction administration, and an open dialog between team members is crucial to adhering to the established budget and schedule.

Over the last three years, schedule and budget have been extremely challenging—COVID’s impact on labor availability, supply chain impacts, and general market demand have been concerns—however our team has consistently demonstrated our ability to deliver on time, on budget projects, including Hermiston School District, Walla Walla Public Schools, Kennewick School District, and several projects for the Confederated Tribes of the Umatilla Indian Reservation.

**B. PRELIMINARY SCHEDULE** Wenaha Group sees no constraints that could affect our ability to perform the services promptly and efficiently.



# 6. AVAILABILITY/FAMILIARITY W/ LOCALE

## A. MANAGEMENT UNIQUE TO LOCATION

Wenaha Group relishes working on projects in Umatilla County – the unique qualities associated with our wonderful piece of Oregon are what inspire, motivate, and excite us about living and working here!

We recognize the challenges to construction that the December snowstorm, or the July thundershower, or that stubborn layer of caliche soil which runs through the building footprint, can impose on a project. Our team brings years of diverse project experience to the table, with a strong focus on sharing our hard-learned lessons to benefit the District and the District's projects; we will sift through the geotechnical report to review soil conditions and ensure that any special considerations are discussed and factored into civil and excavation work. We pour over design documents, paying particular attention to the roofing, wall assembly and window details, ensuring that the design is appropriate for Umatilla.

We know Umatilla County and we take great pride in delivering successful projects in what we consider "home."

## B. KNOWLEDGE OF LOCAL AREA

Our firm cannot be matched for knowledge of the local area – several team members live in Umatilla County, all are working on or have completed successful projects in western Umatilla County, and Project Manager Jose Aparicio is thrilled and honored for the opportunity to return to his hometown and deliver on the District's promises to the Umatilla community.

Our team is passionate about the mission of public education – student success is what drives us personally and professionally and inspires us to do this work EVERY DAY. The commitment to improving student outcomes is a shared team value – we "walk the walk" and are proud to focus on public education projects in rural communities similar to Umatilla.

We bring the local knowledge, those shared values, that inspiration to support public education and an appreciation of what makes Umatilla special, to the District's bond program, and we feel it to be a privilege for the District to place its trust in us to deliver for the community.

## PASSION FOR THE PROJECT

### Umatilla is community-focused and looking towards the future

Our team would love to partner with the District to manage these impactful bond projects. Wenaha Group's 13 Guiding Principles align with the District's vision; we think this could be a great partnership.

## EASTERN OREGON

### Unique Considerations

- **Energy incentives**  
Project Executive, Scott Rogers, recently provided the "Welcome" speech to the Energy Trust of Oregon's 2022 Fall Energy Symposium hosted in Pendleton. His speech outlined how Eastern Oregon approaches energy efficiency and achieving project goals through collaboration and a deliberate, methodical approach to design, material selection, and implementation.
- **Local contractor capacity and availability**  
Umatilla benefits from a pool of locally based general contractors and geographic proximity to the Tri-Cities. Wenaha Group will work diligently to engage smaller, local general contractors and professional service providers to boost the positive economic impact of the proposed District projects.
- **Thoughtful material and systems design**  
Wenaha Group can help inform and emphasize material selection and systems designs that can be locally sourced and installed by local tradespeople.

# 7. REFERENCES

## CURRENT SCHOOL DISTRICT CLIENTS

### HERMISTON SCHOOL DISTRICT

Tricia Mooney, Ed.D., Superintendent  
E: tricia.mooney@hermistonsd.org | Ph: 541.667.6000

### WALLA WALLA PUBLIC SCHOOLS

Wade Smith, Ed.D., Superintendent  
E: wsmith@wwps.org | Ph: 509.526.6715

### HOOD RIVER COUNTY SCHOOL DISTRICT

Rich Polkinghorn, Superintendent  
E: rich.polkinghorn@hoodriver.k12.or.us | Ph: 541.387.5013

### ENTERPRISE SCHOOL DISTRICT

Thomas Crane, Interim Superintendent  
E: tcrane@enterprise.k12.or.us | Ph: 541-426-3812

### BAKER SCHOOL DISTRICT #5J

Erin Lair, Superintendent  
E: erin.lair@bakersd.org | Ph: 541-524-2260

## TESTIMONIAL



The Hermiston School District has had an excellent working relationship with the Wenaha Group for two bond programs over the past ten years. Their team is passionate about public education, transparency, and inclusivity to the process. They've been with us every step of the way through the initial master planning and bond campaign through construction.

With Wenaha managing our bond program, we know the projects will be delivered on time and on budget and our community will feel great about the process.

**DR. TRICIA MOONEY**  
**SUPERINTENDENT**  
**HERMISTON SCHOOL DISTRICT 8R**

# 8. COST OF SERVICES

## A. NOT-TO-EXCEED AMOUNT

Wenaha Group is pleased to submit a not-to-exceed fee amount of ONE MILLION THIRTY-THREE THOUSAND FOUR HUNDRED AND SIXTY EIGHT DOLLARS (\$1,033,468) which is inclusive of Wenaha staff time (\$911,068) and authorized reimbursable expenses (\$122,400).

## B. STANDARD FEE SCHEDULE

In alignment with our Guiding Principles, specifically, "the necessity of transparency" and "the dignity of simplicity", Wenaha Group is always open and transparent in discussing the Cost of Services; we are supportive of staffing based upon the best interests of both the Client and the project. Our approach to this process is straightforward – how many hours do we think our team will need to successfully support the project, and simply apply those hours against our established Hourly Rate Schedule. We are not including any subconsultants in our proposal, however should the District request Wenaha Group to add a subconsultant for additional or augmented services, it would be at the subconsultant cost plus a 10% mark-up.

Role	2023 Hourly Rate
Project Executive (PX)	\$218.00
Project Manager 3 (PM-3)	\$165.00
Project Manager 2 (PM-2)	\$145.00
Project Coordinator	\$77.50



# SCOTT ROGERS CPPB

## PROJECT EXECUTIVE - PRECONSTRUCTION PHASES & ENERGY TRUST OF OREGON ADVISOR

### Project Role & Responsibilities

As project executive for the preconstruction and procurement phases, Scott will oversee the design phases of the bond projects. He will support the team while focusing on quality processes that ensure delivery of promises made to the community and staff. His focus areas will be:

- Constructibility review and value engineering
- Design management
- Budget tracking
- Special issue resolution

Scott has built his career with an emphasis on collaboration, consensus building, and team interaction. He specializes in public procurement and energy conservation programs. Serving as a facilities director for a public agency instructed him on the value of transparency and accountability with taxpayer funds. Scott now works extensively with the Energy Trust of Oregon, integrating sustainability and energy efficiency using cost-effective methods. In 2013, he won a Better Bricks Award for Building Management from the Northwest Energy Efficiency Alliance and in 2014 became an Earth Advantage Certified Project Steward.

### Relevant Project Experience:

Umatilla School District, Facilities Assessment and Energy Trust of Oregon Coordination, Umatilla, OR

Hermiston School District, 2019 Pre-Bond Program, Hermiston, OR  
Energy Trust of Oregon, Small District Outreach Program, OR

Jefferson County SD 509J, Energy Efficiency Projects, Madras, OR

Baker School District, Facilities Master Planning & Long Range Facilities Planning, Baker City, OR

Baker School District, 2021 Pre-Bond Program, Baker City, OR

Enterprise School District, 2020 Pre-Bond Program, Enterprise, OR

Milton-Freewater Unified School District, Pre-Bond and Bond Programs, Milton-Freewater, OR

Joseph School District, Classroom & Gym Addition, Joseph, OR

City of Boardman Pool and Recreation Center CM/GC, Boardman, OR

Morrow County, County Administration Building Addition and Remodel, CM/GC, Heppner, OR

### Experience

24 years of experience

### Education

BS - Finance, Linfield College

### Certifications

Certified Professional Public Buyer (CPPB)

Earth Advantage Project Steward

Northwest Water and Energy Education Institute (NWEEI)

Building Operators Certifications (BOC)

OSHA 10-hour Certified

### Location

Based in Pendleton - 41 miles from Umatilla



# HEATH GARDNER

## PROJECT EXECUTIVE - CONSTRUCTION PHASES

### Project Role & Responsibilities

With 24 years of construction administration experience, Heath will provide construction oversight on behalf of Umatilla School District. His focus areas will be:

- Construction administration
- Budget tracking
- Special issue resolution

During Heath's 24 years of construction management experience he has served as project engineer, project manager, estimator, partner in a general contracting business, and owner's rep. His experience includes a wide variety of project types, as well as more than twenty school and university projects. His success as a general contractor and CM/GC have given him the insight of someone who has experienced first-hand the challenges presented by these types of projects. As a result, he is capable of predicting problems and implementing strategies to solve them or avoid them entirely. Heath uses his communication skills to build a team atmosphere and create situations where all stakeholders can be successful.

### Relevant Project Experience:

Walla Walla Public Schools, Bond Project Management, Walla Walla, WA

Hermiston School District, Bond Management, Hermiston, OR

Kennewick School District, Kennewick High School Replacement, Kennewick, WA

Grandview School District, Bond Project Management, Grandview, WA

East Valley School District No. 90, Bond Project Management, Yakima, WA

Yakima School District, AC Davis High School  
Modernization and Addition, Yakima, WA

Finley School District, Bond Project Management, Kennewick, WA

Grand Coulee Dam School District, Lake Roosevelt K-12, Coulee Dam, WA

Othello School District, Scootney Spring Elementary School, Othello, WA\*

*\*Work performed at previous firm*

### Experience

24 years of experience

### Education

BS - Construction  
Management, Central  
Washington University

### Certifications

OSHA 10-hour Certified  
OSPI BCA Certified  
First Aid/CPR  
AVS Value Engineering

### Location

Based in Kennewick - 27  
miles from Umatilla



# JOSE APARICIO LEED AP

## PROJECT MANAGER, DAY-TO-DAY CONTACT

### Project Role & Responsibilities

Jose will provide day-to-day project management in addition to quality management, budget and schedule management, and design and construction oversight. As a native Spanish speaker who grew up in Umatilla, he understands and knows the community well. Some of his responsibilities will include:

- On site, day-to-day project management
- Quality management
- Budget and schedule management
- Design and construction oversight

Jose has led high-value and high-visibility projects over his career as both a leader and contributing team member. His repertoire includes project planning, implementation to budget tracking, and reporting. He has operated in fast-paced environments with multiple stakeholders, and has been able to produce measurable outcomes on budget and on schedule. Jose’s hands-on experience and skill in working with internal and external stakeholders enables him to add value to the successful delivery of the bond projects.

### Relevant Project Experience:

Hermiston School District, 2019 Bond Program, Hermiston, OR

Hood River County School District, 2016 Bond Program, Hood River, OR

Confidential Client, new 400,000 SF Data Center, Oregon\*

Macerich Northgate, Mall Renovation, San Rafael, CA\*

Prologis, Pacific Commons Retail District Phase II, Fremont, CA\*

Simon Property Group, Stanford Shopping Center Redevelopment, Palo Alto, CA\*

Simon Property Group, Stanford Shopping Center Renovation, Palo Alto, CA\*

Target Corporation, Multiple Store Remodels, Fresno, Bakersfield, Hayward, San Bruno, and San Leandro, CA\*

Target Corporation, new 135,000 SF Retail Store, Petaluma, CA\*

Target Corporation, new 177,000 SF Retail Super Store, Atwater, CA\*

*\*Work performed at previous firm*

### Experience

16 years of experience

### Education

BS - Construction Management, Oregon State University

### Certifications

OSHA 30-hour Certified  
LEED AP

### Location

Based in Pendleton - 41 miles from Umatilla

### Invested in the Umatilla Community

Jose grew up in Umatilla and attended Umatilla High School. His connection to the eastern Oregon region provides the team with valuable familiarity and community context.



# ANTHONY BONIFER

## PROJECT MANAGER

### Project Role & Responsibilities

Anthony will support Jose throughout the design and construction process for the bond projects. As the projects move into construction, Anthony will take a larger role in providing onsite construction administration and oversight. Anthony's focus will be on Quality Assurance/Quality Control (QA/QC), working directly with the contractors to ensure the work is performed per the specifications.

Anthony has 9 years of hands on experience in construction. He started his professional career through the Confederated Tribes of the Umatilla Indian Reservation (CTUIR) TERO Program, working in a variety of trades making way for an appreciation for delivering on-time and on budget work.

### Experience

9 years of experience

### Certifications

Journeyman's Certificate,  
PNW Carpenter's Institute

### Location

Based in Pendleton - 41  
miles from Umatilla

### Relevant Project Experience

Hermiston School District, Hermiston High School Softball Fields, Hermiston, OR

Hermiston School District, Rocky Heights Elementary School, Hermiston, OR

Hermiston School District, Loma Vista Elementary School, Hermiston, OR

Hermiston School District, Hermiston High School Addition, Hermiston, OR

Confederated Tribes of the Umatilla Indian Reservation,  
Yellowhawk Tribal Health Center, Pendleton, OR\*

Confederated Tribes of the Umatilla Indian Reservation,  
Wildhorse Clubhouse, Pendleton, OR\*

Confederated Tribes of the Umatilla Indian Reservation,  
Wildhorse Family Funplex, Pendleton, OR\*

Confederated Tribes of the Umatilla Indian Reservation,  
Wildhorse Office Space Addition, Pendleton, OR

Confederated Tribes of the Umatilla Indian Reservation,  
Hazard Mitigation Grant Project, Pendleton, OR

Confederated Tribes of the Umatilla Indian Reservation,  
COVID 19 Improvements, Pendleton, OR

Confederated Tribes of the Umatilla Indian Reservation,  
Nizyaawii Housing Project, Pendleton, OR

\*Work performed at previous firm



# BROOKLYNN JEFFERSON

## PROJECT COORDINATOR

### Project Role & Responsibilities

Brooklynn will provide administrative support as needed. This includes project documentation and communication support.

Brooklynn has been providing administrative and coordination support for over 15 years in the architecture, engineering, and construction industry. As a project coordinator, she is tasked with providing support for monthly project reports; monitoring project plans, schedules, budgets, and expenses; organizing and participating in stakeholder meetings; and ensuring that project deadlines are met. Her ability to take on many different tasks while providing the highest level of support to clients is key to a project's success.

### Experience

15 years of experience

### Education

BA - Communication,  
Washington State University

### Location

Based in Kennewick - 27  
miles from Umatilla

### Relevant Project Experience:

Hermiston School District, 2019 Bond Program Management, Hermiston, OR

East Umatilla Fire & Rescue, Weston Fire Station, Weston, OR

Milton-Freewater New Police Station, Milton-Freewater, OR

Finley School District Bond Program Management, Kennewick, WA

Kennewick School District, Kennewick High School Replacement, Kennewick, WA

Walla Walla Public Schools Bond Program Management, Walla Walla, WA

East Valley School District Bond Program Management, Yakima, WA

Grandview School District Bond Program Management, Grandview, WA

Baker School District #5J Bond Program Management, Baker City, OR

Enterprise School District Bond Program Management, Enterprise, OR

Tri-Cities Community Health, Mini Pesina Clinical Services Building, Pasco, WA\*

Pasco School District, Early Childhood Learning Center, Pasco, WA\*

Hermiston School District, Armand Larive Middle School, Hermiston, OR\*

*\*Work performed at previous firm*



Learn more at [wenahagroup.com](http://wenahagroup.com)

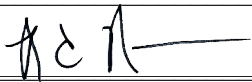
125 SE Court Ave, Ste A  
Pendleton, OR 97801

## Appendix C-1

### CERTIFICATION OF NONDISCRIMINATION

The undersigned Proposer is aware that, under ORS 279A.110, no Proposer who contracts with a public contracting agency may discriminate against minority, women, or emerging small business enterprises certified under ORS 200.055 or a business enterprise that is owned or controlled by or that employs a disabled veteran, as defined in ORS 408.225, in the awarding of subcontracts. Accordingly, the undersigned Proposer hereby certifies as part of its Proposal submission that it has not and will not discriminate against any minority, women, or emerging small business enterprises or a business enterprise that is owned or controlled by or that employs a disabled veteran in obtaining any of the required subcontracts for this project.

Firm Name Cornerstone Management Group, Inc.

Authorized Signature 

Printed Name Rick Rainone

Title President

Date March 24, 2023

## Appendix C-2

### PROPOSER RESIDENCY STATEMENT

Pursuant to ORS 279A.120, Oregon's reciprocal Preference Law, public contracting agencies shall, for the purposes of determining the lowest responsible bidder/proposer and the awarding of a contract, add a percent increase on the bid of a non-resident bidder/proposer equal to the percent, if any, of the preference given to that bidder/proposer in the state in which the bidder/proposer resides.

As defined in ORS 279A.120, "Resident Bidder/proposer" means a bidder/proposer that has paid unemployment taxes or income taxes in this state in the twelve calendar months immediately preceding submission of the bid, has a business address in this state, and has stated in the bid whether the bidder/proposer is a "Resident Bidder/proposer". A "non-resident Bidder/proposer" is a bidder/proposer who does not meet the definition of a "Resident Bidder/proposer" as stated above.

Bidder/proposer/Proposer  IS/  IS NOT a "Resident Bidder/proposer" as set forth above.

2. If a Resident Bidder/proposer, enter your Oregon Business address below:

29030 SW Town Center Loop E, Suite 202-528

Wilsonville, OR 97070

3. If a Non-resident Bidder/proposer, enter state of residency:

Bidder/proposer/Proposer hereby certifies that the information provided is true and accurate.

Signature:  Date: March 24, 2023

Printed or Typed name: Rick Rainone

Title: President

Telephone: 503.319.0845

Appendix C-3

**UMATILLA SCHOOL DISTRICT**  
**Acknowledgement of Addenda**

I/we have received and reviewed the RFP and any Addenda issued by the District and this submission is our entire proposal. Addenda Received:

Addendum No. \_\_\_\_\_ Date Received \_\_\_\_\_

Addendum No. \_\_\_\_\_ Date Received \_\_\_\_\_

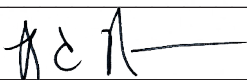
Addendum No. \_\_\_\_\_ Date Received \_\_\_\_\_

Addendum No. \_\_\_\_\_ Date Received \_\_\_\_\_

Addendum No. \_\_\_\_\_ Date Received \_\_\_\_\_

If no addendum received write "None" None

Firm Name Cornerstone Management Group, Inc. \_\_\_\_\_

Authorized Signature  \_\_\_\_\_

Printed Name Rick Rainone \_\_\_\_\_

Title President \_\_\_\_\_

Date March 24, 2023 \_\_\_\_\_

## Appendix C

### UMATILLA SCHOOL DISTRICT Proposal to Provide Project Management Services

#### Firm Contact Information

Firm Name: Cornerstone Management Group, Inc.  
Name of Contact Person: Rick Rainone  
Address: 29030 SW Town Center Loop E, Suite 202-528  
Wilsonville, OR 97070  
Phone Number: 503.319.0845  
Email Address: rcrainone@cornerstonemgi.com  
Facsimile:

#### Firm Qualifications

(Please attach additional pages as necessary,  
subject to the 10-page limitation identified in the RFP)

### 1. BACKGROUND

a. Please describe the history of your firm:

Cornerstone Management Group, Inc. (CMG) is an Oregon-based corporation that is owned 100% by Rick Rainone and was incorporated in 2001. President Rick Rainone's more than 3 decades of experience representing owners of construction projects firmly establishes him as one of the Northwest's most knowledgeable individuals in regard to both public and private facilities. More information can be found on [page 1](#).

b. Please describe your firm's corporate mission and vision:

Rick has built a cohesive team of professional individuals who have extensive construction management experience with a wide variety of construction methods and project scopes. Our 10 professional project managers have approximately 145 years of combined experience in K-12 public school construction and have successfully managed 30 school construction bond programs for 26 school districts.

c. Please attach evidence of your Professional Liability Insurance Policy, including a description of annual per claim and aggregate limits and any claims history in the last 5 years.

If selected, Cornerstone Management Group, Inc. shall provide the insurance coverage required in the RFP.

*d. Please describe the nature and status of any claims, actions, or lawsuits made against your firm within the last five (5) years. Claims should be disclosed regardless of whether they involved litigation, arbitration, or other formal dispute resolution process. The disclosures required under this provision also apply to any claims arising out of services of any principal or officer of your firm or any member of the project team regardless of whether the person was associated with your firm at the time of the claim.*

Cornerstone has not been involved in any claims in the last 5 years.

*e. Please indicate whether your firm or any personnel have been involved in any litigation, arbitration or mediation, either as defendant or plaintiff, over the five (5) years immediately preceding the closing date of the RFP. If your firm or any personnel has been involved in any such litigation, arbitration or mediation, provide a general description of the cause or nature and status of each case or claim, and the identity of the client.*

Neither Cornerstone, or any personnel at Cornerstone have been involved in litigation, mediation or arbitration as a defendant or plaintiff within the last 5 years.

*f. Please indicate whether your firm has ever been terminated from a project. If so, please provide the name(s) and address(es) of the client(s) and the nature of the termination.*

Cornerstone has not been terminated from a project.

## **2. PROJECT TEAM AND STAFFING**

*a. Please describe your organizational approach to providing the Services.*

Cornerstone's experienced, professional team is more than qualified to complete the scope of work described in the District's RFP. Cornerstone is currently providing owner's representative services for 5 school districts in Oregon, and our proposed team has the time and capability to provide outstanding program and project management services for the District's bond program. We have provided an organizational chart that details our project team and their roles on [page 2](#).

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*b. Please describe current work load and priority of providing the Services as it relates to overall work load.*

Cornerstone is currently working on projects with the Newberg, Forest Grove, Canby, St. Helens, and Hillsboro School Districts, as well as Clatsop County. With our team of project managers, we have the capacity to take on additional projects from Umatilla School District.

*c. Please describe responsibilities of personnel assigned to provide the Services.*

Our team roles are listed below, detailed bios and responsibilities are on [page 2](#).

**Rick Rainone** — Project Executive/Principal-In-Charge

**Casey Cunningham, LEED AP, CPTED** — Sr. Project Manager

**John Abel, LEED AP** — Program Manager

**Becca VandeWalle** — Project/Budget Manager

**Emil Hameed** — Sr. Project Manager

**Mary Dolan** — Project Manager

*d. Please state whether your firm is capable of performing all Services described in this RFP and other Services recommended in the Proposal. If your firm intends to subcontract any of the Services to other consultants, the Proposal shall identify those consultants and describe the consultants' experience in providing the type of Services covered by this RFP.*

The CMG team has 10 project managers on staff and has dedicated four of them to this bond. John Abel will be the Program/Contract Manager and primary contact for the District. John will be supported by Sr. Project Managers Emil Hameed and Casey Cunningham, as well as Project Managers Becca VandeWalle and Mary Dolan. Our team is committed to bringing whatever resources are required for the successful delivery of all of your bond projects. Serving school districts is what we do and we pride ourselves on the fact that Cornerstone has never been in any mediation, arbitration, litigation, or other legal action with an owner, client, or contractor. We are committed to collaboratively delivering projects on-time and in budget.

*e. If your firm has multiple locations, please identify the offices in which the various components will originate.*

Cornerstone has one main office located at 29030 SW Town Center Loop E, Suite 202-528, Wilsonville, OR 97070

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*f. Please attach a copies of resumes of key personnel.*

Please see key staff resumes in the Appendix.

### **3. RELATED EXPERIENCE**

*a. Please describe your previous experience on similar projects. Specifically, provide your firm's history of providing similar Services on time and within budget and identify projects of similar scope and scale.*

Cornerstone has extensive experience working on long range facility improvement programs, with a majority of that work being performed for K-12 School Districts. To get the best project and program management for bond programs one must have more than a background in construction. With our experience, we are able to effectively manage your projects from punch list to public perception. Our job is to make your taxpayers proud of the projects, we pride ourselves on the oversight committees saying they are actually excited about paying their taxes because of the excellent bond management that we provide. This is why districts have us back every cycle to help them manage their projects. Additional information can be found on [page 3](#).

*b. Please describe your firm's role in developing the budget, scope and schedule for each example and your firm's performance in achieving the budget, scope and schedule requirements for each.*

Cornerstone has managed over \$6.9 billion of public improvement projects working directly for public agencies, providing us with the knowledge required to successfully carry out projects in the public sector, and we are committed to spending taxpayer money wisely. We strongly believe that our fiduciary responsibility is to see that taxpayers receive 100% value for their investment. Our management approach, our systems, and our leadership have assisted our clients in saving, in the aggregate, over \$82 million on their projects while maintaining or exceeding the quality of work initially expected.

*c. Please provide a listing of all of your firm's lost or discontinued accounts in the State of Oregon within the last five years.*

Cornerstone does not have any lost or discontinued accounts in Oregon in the last 5 years.

*d. Please describe your firm's previous experience administering and implementing Energy Trust of Oregon programs and projects. Specifically identify projects involving your firm's administration and implementation of Energy Trust of Oregon programs and projects.*

Over the past 10 years Cornerstone has identified energy efficiency measures and worked with various agencies to collect more than \$13M from the State of Oregon, Energy Trust of Oregon (ETO), and local utility providers. With our existing relationships and our knowledge of energy incentive programs throughout the State, we will assist the District identify and receive the maximum amount of funds that are available. The goal is to guarantee the energy savings and deliver a project that should pay for itself in energy savings. A simplified explanation of our process is that we work with qualified energy services companies who perform energy audits at each site to determine the current state of mechanical and electrical systems, we can identify which areas are available for rebates and incentives. These EEMs, or Energy Efficiency Measures, are then tracked, and working with agencies like ETO, the incentives are collected and paid back to the district. Additional information on [page 5](#).

*e. Please describe your firm's experience leveraging rebate and incentive programs to supplement existing project funding. Specifically identify projects involving your firm's experience leveraging rebate and incentive programs to supplement existing project funding.*

Energy Trust of Oregon provides a number of rebate and incentive programs for their customers. Understanding how to incorporate these programs effectively into an energy project is crucial to reducing overall project costs. We frequently find creative ways to get projects more incentive funding, while operating completely transparently and within the bounds of ETO program rules.

#### **4. OVERALL PROJECT APPROACH**

*a. Please describe your firm's knowledge and understanding of the Services and your overall approach to provide the Services. Discuss communication methods and techniques for interaction with the owners such as the District and other team members. Outline the elements of service delivery, including deliverables, which you philosophically embrace as being crucial to achieving a successful outcome for owners such as the District.*

Cornerstone understands the District is looking to partner with an experienced owner's representative to assist in the completion of numerous capital improvement projects. We understand there is a vital need to make improvements to both physical structures and infrastructure through technology upgrades, resiliency, ADA accessibility, and overall safety and security across the District. We know that big ticket items like roof replacements, HVAC upgrades, new schools, and CTE upgrades must be managed appropriately so there is plenty of funding for maintenance items that can no longer be deferred and especially for the necessary security vestibule upgrades for staff and student safety as we understand that is a critical issue among stakeholders. Additional information can be found on [page 6](#).

*b. Please Describe your firm's quality control approach to each phase of the process.*

To guarantee a high-quality end product, Cornerstone will assist the District in preparing a QA/QC plan, which will outline a comprehensive plan for site inspections during the construction phase. We will coordinate site visits by the Design Team and other Project Consultants, maintain a log of all site visit reports, being sure to track any deficiencies found during construction and ensure that defects are corrected promptly. We will also either maintain and update current construction standards that the District utilizes, or assist in developing them so that construction types, finishes, and products are consistent throughout the Bond projects.

*c. Describe your firm's experience with project estimating and the process that would be used to provide Services of this scope.*

Cornerstone has developed a very successful approach in preparing and managing a detailed work plan for a single project or a multiple project capital improvement program. The table on [page 8](#) describes our proposed work plan and the expected benefits for the District bond program.

d. *Please describe any additional services not identified in this RFP that you believe to be necessary for successful completion of the Project. Please describe how the additional services would benefit the District, describe your firm's ability to provide the additional services, and propose a cost for providing the additional services.*

We have read the Scope of Work and find it detailed and adequate with the services CMG provides. We don't anticipate any additional services, however, if additional services are requested, CMG will review and use our creativity to mitigate the unexpected costs and keeping the project on budget and completed on-time. Cornerstone has an unmatched relationship with members of the K-12 marketplace including consultants, contractors, public agencies, and vendors. We provide fairness in our approach of how we handle or problem-solve issues. We protect the owner but also take a win/win approach to conflict resolution with contractors.

## **5. APPROACH TO SCHEDULE AND BUDGET**

a. *Please describe your firm's process for achieving budget and schedule adherence and your success rate for achieving such on projects in the last three years.*

Cornerstone understands that effective cost control is of great importance. Some of the ways our team works to control cost include: Developing a detailed budget for every project; Developing contracts that confirm what will be done by any and all professional firms or contractors; Monitoring the completion of the services or construction to ensure cost-to-accelerate is avoided; Requiring detailed back-up on every change order; Reviewing every invoice and/or pay application; Controlling the scope of the project during the design phase; Completing detailed constructability reviews and effective value engineering to maximize quality and control cost on bid day; Selecting a bid day that will maximize bid results and reduce cost.

b. *Please attach a duration-based preliminary schedule depicting major activities and milestones for each project element included in the Services and identifying any constraints that could affect your firm's ability to perform the Services promptly and efficiently.* Schedule can be found on [page 10](#).

## **6. AVAILABILITY TO AND FAMILIARITY WITH THE DISTRICT LOCALE**

a. *Please describe your firm's experience with project management services that are unique to the Project location, including but not limited to; soil conditions, climate, and weather-related considerations and how you will use that experience to benefit this project.*

Cornerstone has worked throughout the state of Oregon, and has knowledge and established relationships with key individuals and firms to address any Site Conditions that may arise during the projects.

b. *Provide information regarding your firm's knowledge of the local area and the unique aspects of the region and community that will influence your process.*

Cornerstone has worked throughout the state of Oregon, and has knowledge and established relationships with key individuals and firms to address any Site Conditions that may arise during the projects.

**7. REFERENCES**

Please identify and provide contact information (school district name, contact name, phone number, and email address) for all school districts for whom your firm currently provides project management services.

Below we have provided owner, architect, and contractor references for our most recent and relevant projects.

**Sherwood School District**

**JIM ROSE**

jrose@sherwood.k12.or.us  
503.825.5007

**Hillsboro School District**

**ADAM STEWART**

stewart@hsd.k12.or.us  
503.844.1327

**Canby School District**

**DENISE LAPP**

denise.lapp@canby.k12.or.us  
503.266.7861

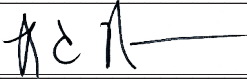
**8. COST OF SERVICES**

a. Please specify an estimated not-to-exceed amount for the Services: \$331,000

b. Please attach your firm's standard fee schedule for the Services (including the multiples of direct personnel expense, direct salaries, Consultants' charges and reimbursable expenses).

Please see our standard fee schedule on [page 9](#).

Firm Name Cornerstone Management Group, Inc.

Authorized Signature 

Printed Name Rick Rainone

Title President

Date March 24, 2023

# ADDITIONAL INFORMATION

## 1. BACKGROUND

### a. Firm History

**CMG** has a team of 10 professional project managers who have approximately 145 years of combined experience in K-12 public school construction and have successfully managed 30 school construction bond programs for 26 school districts. Our project managers have also worked together on many K-12 bond projects, making our team strong and ideally suited to provide services to the District. We have managed more than 900 construction projects in Oregon, valued at approximately \$6.9 billion. Our team has been re-selected by public agencies to work on K-12 bond programs six times.

This firsthand insight into what makes for successful K-12 learning environments helps inform our approach on all projects and offers us better insight into the minds of teachers, students, and administrative staff. Cornerstone has spent the last 21 years working as owner's representatives and project managers on myriad projects that are very similar to upcoming projects the District is planning. Our managers are there in team meetings from the start, managing each bond program in partnership with the school districts we serve, and actively partaking in land use management, design team development, contractor selection, construction management, and closeout. We believe good school design is vital to both student and staff assembly, recreation, and education.

Within the past five years alone, Cornerstone has delivered 20 secure vestibules and 50 projects involving new security cameras, access control, and intrusion detection. Our scopes of work have included: roofing; HVAC repair, replacement, and renovation; new carpeting; polished concrete floors; electrical distribution upgrades; window replacements; siding repair and replacement; seismic improvements; boiler replacements; and domestic piping replacement. Additionally, we understand the impacts of COVID on school projects, from 2020 - 2021 we have transformed two middle schools into elementary schools, and one high school into a middle school.

**Public Agencies and Public Contracting:** Cornerstone has managed over \$6.9 billion of public improvement projects working directly for public agencies, providing us with the knowledge required to successfully carry out projects in the public sector, and we are committed to spending taxpayer money wisely. Working mainly for Oregon agencies, we are very familiar with the statutes and rules governing public contracting, such as ORS 279 and associated OARs. We have utilized every means of public procurement, including state purchasing contracts, cooperative agreements, and other similar practices.

Our knowledge of these rules and regulations helps us guide clients to spend taxpayer money to ensure that every financial transaction will hold up to the state and local agency audit programs.

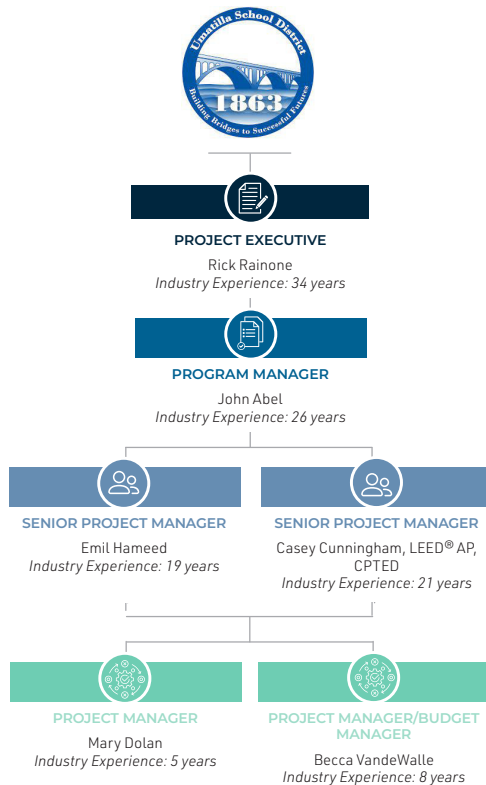
Cornerstone is committed to being excellent stewards of public money. We strongly believe that our fiduciary responsibility is to see that taxpayers receive 100% value for their investment. Our management approach, our systems, and our leadership have assisted our clients in saving, in the aggregate, over \$82 million on their projects while maintaining or exceeding the quality of work initially expected.

**Remodeling:** Cornerstone has extensive experience with additions and renovations to existing timber framed structures. Over the past 21 years we have worked on over 100 seismic upgrades, and 120 additions. We know what is required to complete this type of construction which can be invasive and disruptive to existing finishes and systems. In order to make these projects successful our process includes the following:

- Extensive Site Investigations
- Open ceilings/walls as needed to review existing conditions
- Accurate documentation and bid documents to depict a complete scope of work for bidders
- Factor in Safety of Staff, Students & Public in all phases of work
- Review and repair any damaged wood found during construction to ensure repairs will be solid and last for years to come

## 2. PROJECT TEAM AND STAFFING

### Organization of Team



### Key Staff Bios



**Rick** has been in the Owner's Representative/Project Management business for over 30 years and has served clients in all industries. Rick has endured the tide of every wave the construction industry has taken over the past three decades. He will lean on his experience and wisdom amidst these turbulent construction times to provide a path to successful outcomes. **His leadership and steady guidance of all Cornerstone team members will give a positive, enriching experience for the District.**



**Casey** is a third-generation construction manager with a passion for building. **He has become our in-house seismic project management expert.** Having the opportunity to create a safer environment for the people using the building while enhancing the space is a challenge he seeks out. Seismic projects allow us to dig into a building with engineers and designers to understand its deficiencies and develop a plan to make it better. This challenge creates a partnership like very few in the industry managing budget, scope, and schedule with each unique way of solving the deficiency. Fostering a relationship that allows open dialogue on how best to meet the challenge and what each option costs you in quality, time, and dollars is its challenge that is equally exciting and integral to the success of the project.



**John** brings a wide range of experience to his projects and truly loves being part of a successful team. He has worked on complex addition & renovation projects on occupied sites in recent years. **Many aspects make these types of projects challenging, including building in multiple phases, installing temporary life safety measures during construction, and ensuring the continued safety of the occupants and general public.** These and other challenges are what John loves about these complex projects and make them rewarding. The projects allow him to lead and work with the team to review all options related to cost, quality and schedule as the plan is developed and implemented that is best for the Owner.



**Emil** began his construction career as an apprentice carpenter. While earning his journeyman card, he worked his way up from carpenter, foreman, superintendent, and finally Project manager and estimator. He worked for the same firm during all that time, gaining plenty of construction knowledge, and is very capable of reviewing all sections of the plans and specs and ensuring that the construction is well built and on time. **Emil has worked on a variety of education projects for a wide array of school districts including Hillsboro, Fern Ridge, North Clackamas, and Gresham-Barlow School Districts.**



**Mary** is an excellent communicator with strong organizational skills. She is also a strong team player and spent her formative years playing competitive soccer. Those experiences as a team player come through in managing project teams. **She uses her skills to successfully get projects from inception through construction on time and within budget.** She has demonstrated success on complex tenant improvement and expansion projects through facilitating communication between the Owner, design team, and other stakeholders.



**Becca** enjoys all aspects of the construction management process with a particular talent for building relationships with AHJ Building Officials, Planning Department Staff, Building Inspectors, and Plan Reviewers. **Becca has been known to spend a holiday weekend meeting a Building Official on a nearly-completed construction site to ensure that the Owner achieves occupancy according to their schedule.** In addition to Becca's land use and permitting expertise, Becca is dedicated to diversity, equity, and inclusion in all aspects of the construction process, including: (1) procurement via the contractor engagement process which can assist an owner to achieve MWESB contracting goals; (2) equitable design that considers all stakeholder and user groups; and (3) as an advocate for DEI-hiring practices within Cornerstone MGI.

### 3. RELATED EXPERIENCE

#### a. Project Experience

As shown in the previous sections, Cornerstone has extensive experience working on long range facility improvement programs, with a majority of that work being performed for K-12 School Districts. To get the best project and program management for bond programs one must have more than a background in construction. There is an art to navigating the interrelation of stakeholders on these projects. Board members, taxpayers, contractors, designers, local politics, students, and staff all play a part in the success of these projects. With our experience, we are able to effectively manage your projects from punch list to public perception. Our job is to make your taxpayers proud of the projects, we pride ourselves on the oversight committees saying they are actually excited about paying their taxes because of the excellent bond management that we provide. This is why districts have us back every cycle to help them manage their projects. Select projects follow the table.

BOND PROGRAM	CLIENT CONTACT	PERIOD OF PERFORMANCE
<b>Hillsboro School District</b> Hillsboro, OR	Adam Stewart (503) 844-1340	2017 - 2022
		2006 - 2011
		2001 - 2003
		1993 - 1999
<b>Forest Grove School District</b> Forest Grove, OR	Mike Schofield <i>(now at Beaverton SD)</i> (503) 356-4540	2010 - 2013
		2001 - 2005
<b>Salem-Keizer School District</b> Salem, OR	Bruce Lathers <i>(retired)</i> (503) 565-4000	2007 - 2015
<b>Canby School District</b> Canby, OR	Denise Lapp 503.266.7861	2020 - 2023
<b>Fern Ridge School District</b> Elmira, OR	Gary Carpenter (503) 365-4500	2012 - 2015
<b>Newberg School District</b> Newberg, OR	Larry Hampton 503.840.5346	2021 - 2023
<b>North Clackamas School District</b> Milwaukie, OR	Ron Stewart (503)563-8600	2018 - 2021
<b>Gresham-Barlow School District</b> Gresham, OR	Jordan Ely (503) 261-4550	2016 - 2022
<b>Sherwood School District</b> Sherwood, OR	Jim Rose (503) 825-5007	2017 - 2021

## SHERWOOD HIGH SCHOOL

Sherwood School District

SHERWOOD, OR

**Scope of Work:** Sherwood School District passed a bond in May of 2016 with the goal of keeping Sherwood a 1 high school town. To achieve this goal, Cornerstone worked with the bond development team to create a new 353,000 square foot high school with the ability to expand within its footprint and convert four existing schools in the district into district office, two elementary schools, and a middle school to allow for future expansion. The crown jewel of the bond was the new high school sitting on 73 acres adjacent to Highway 99 required extensive partnership with city, county, and state agencies to incorporate the land and build necessary infrastructure.

Cornerstone assumed a vital role as owner's representative and project manager. Together with the various, key parties of designers, engineers, council, and planners, the District successfully navigated a comprehensive land use and land acquisition process for this project. The project had a total cost of \$158 million and covered 353,000 square feet. The final product is a new, modern high school with four stories of classrooms, CTE spaces, gymnasiums, an auditorium, and a full-service kitchen. Within the school's 73-acre campus, there are: 1 greenhouse, 5 artificial turf fields, 2 natural turf fields, parking lots, and hardscapes.

**Client:** Sherwood School District

**Project Dates:** 1/2017-8/2020

**Construction Budget:** \$158 million

## EASTWOOD ELEMENTARY SCHOOL

Hillsboro School District

HILLSBORO, OR

**Project Description:** Improvements were completed at Eastwood Elementary School in January 2020 for the Hillsboro School District. This site had the distinction of being the first of eight HSD schools to have a prototype, insulated, pre-manufactured metal panel gym. The 10,000 square foot gym includes clerestory windows, exterior brick, a vestibule, restrooms, PE storage and an office, custodial and maintenance rooms, and concrete bleachers.

A new 5,000 square foot, four-classroom modular building with restrooms was built to replace existing portable buildings, and a new 5,000 square foot rubber tile playground replaced the existing playground area—complete with new equipment, a turf playfield, and a woodchip running track.

The main school building renovation included the addition of a security vestibule, adding heat to the existing HVAC system, and adding a new ADA restroom and ADA lift. The fire alarm and PA system, seismic standards, and painting and wall protection for the cafeteria and all common space doors were upgraded.

**Client:** Hillsboro School District

**Project Dates:** 9/2017-8/2020

**Construction Budget:** \$6.2 million

## SAM BARLOW HIGH SCHOOL ADDITION AND REMODEL

Gresham-Barlow School District

GRESHAM, OR

**Project Description:** This was a multi-year and phased occupied addition and remodel project at the existing Sam Barlow High School. Over 60,000 SF of new addition was added to the school, renovations to over 100,000 SF, a new Covered Stadium seating 1500 was added, and major parking lot upgrades and modifications were included as well. The project was successfully completed in Fall of 2020.

**Client:** Gresham-Barlow School District

**Project Dates:** 6/2017-8/2020

**Construction Budget:** \$65.5 million



*Exterior courtyard at Sherwood School District's new Sherwood High School*

## Energy Incentive Experience

### OUR PROCESS

The goal is to guarantee the energy savings and deliver a project that should pay for itself in energy savings. A simplified explanation of our process is that we work with qualified energy services companies who perform energy audits at each site to determine the current state of mechanical and electrical systems, we can identify which areas are available for rebates and incentives. These EEMs, or Energy Efficiency Measures, are then tracked, and working with agencies like ETO, the incentives are collected and paid back to the district. While each situation is unique, we often use the following approaches:

### PROJECT VIABILITY

Step one is to determine if a project is viable to implement. This could be related to the project size, cost effectiveness, technical feasibility or constructability. When thinking about viability of a project for an energy incentive program we ask the following questions:

**Will the project save energy?** This is the most basic question we ask at the beginning of a project. Clearly and transparently identifying the ability to implement a project that will result in savings.

**Will the project be cost effective?** If the project saves energy, we then need to determine if it's cost effective to implement the project. If net energy savings aren't enough we look at ways to reduce project costs, identify additional funding, and increase performance.

**Will the project meet the building needs?** Regardless of the energy savings, if a project doesn't meet your needs, then it's a waste of money to pursue. We make sure that projects meet the highest and best use for our clients.

**Is it constructable and can it be built within the schedule?** Many k-12 construction projects are best completed during summer break, and it's our responsibility to ensure that construction methods and timelines fit with our client's needs. If not, then we look for alternatives like project phasing or alternative means and methods.

## FACILITY AUDITS

Facility Energy Analysis is based on first developing a clear understanding of existing facility infrastructure and your goals. Engineering staff complete onsite surveys, interviews, and perform a comprehensive analysis of utility data to develop fine-tuned energy models, using your exact facility details. Then facility energy usage is simulated to quantify the impact of any recommended improvements.

## EQUIPMENT SELECTION

For systems and major equipment, we work closely with facilities staff to understand their product preferences and ensure that our designs incorporate building design standards. Benefits of each are evaluated through life-cycle cost analysis and the results are discussed with staff to arrive at the final recommended EEMs.

## LIFE CYCLE COST ANALYSIS

Using Life Cycle Cost Analysis (LCCA) helps our clients make the best decisions about each of their projects to **produce an overall lowest total cost of ownership.**

LCCA incorporates estimates of:

1. Installed capital costs
2. Annual utility costs
3. Maintenance and repair costs
4. Future capital replacement costs

## 4. OVERALL PROJECT APPROACH

Cornerstone understands the District is looking to partner with an experienced owner's representative to assist in the completion of numerous capital improvement projects. We understand there is a vital need to make improvements to both physical structures and infrastructure through technology upgrades, resiliency, ADA accessibility, and overall safety and security across the District. We know that big ticket items like roof replacements, HVAC upgrades, new schools, and CTE upgrades must be managed appropriately so there is plenty of funding for maintenance items that can no longer be deferred and especially for the necessary security vestibule upgrades for staff and student safety as we understand that is a critical issue among stakeholders. Proactive cost and budget management means we can add projects using bond funds or add additional features to additions. Having previously completed such improvements across 28 school construction bond programs for 24 school districts in Oregon, Cornerstone is capable of providing sound advice and collaborative leadership to your team as the District navigates this extensive scope of work; we will confidently stand behind all recommendations made to the District.

In order to achieve success on these projects, we will act as a true partner to the District, community, designers, and contractors. For our team, this means ensuring that—from the start, and throughout the entirety of the bond program—there is open communication, mutual respect and trust, and a collaborative forum amongst all project partners and stakeholders. Capital improvements can be inherently challenging, but by adhering to these principles, we can help the District achieve a successful bond program in a timely and cost-effective manner.

Our primary role as your owner's representative will be to advising and cooperatively navigating any and all complexities that arise. Early on, we will work alongside both the District and designers to develop key processes, committees, and charrettes and ensure the bond program remains inclusive, direct, and productive. There are three items in particular that will be important in delivering comprehensive and consistent improvements across all projects, no matter how big or small; these are **the bond management plan, District standards, and communication plan.**

- » The **bond management plan** defines how we implement equity and inclusivity in development of the bond management team, design committees, and charrettes. We know it is very important to the District that these capital improvements be equitable across all schools, and developing a diverse environment for these teams and committees will advise our development of the schedule, scope, and budget for the bond program.
- » The **District standards** will influence the design phase and determine the materials and design standards that will remain consistent throughout all improvement projects. We will work with the District's Architect, the District, and key consultants to develop these standards and create a document that can be utilized beyond just this bond program.
- » The **communication plan** shepherds how we reach all members of the community. We value input from individuals who are vocal presences throughout the bond program and appreciate the time they graciously give, but we also want to create an approach for reaching the community members who are either unable or unsure of how to maintain the same level of engagement. In developing the communication plan, we will learn more about the community and develop a blueprint for outreach. As part of this agenda, we will outline how to develop relationships with City and County staff; celebrate successes and stories resulting from the bond; and support the Bond Oversight Committee's role in the critical community engagement component, ultimately validating and reciprocating the inclusion, trust, and respect we will manage the bond with.

We will begin working immediately with the team to develop each of these key project components. To guarantee everyone is always working off of the same information and documents for these steps, we will utilize software that is accessible to all team members and not exclusive to licenses, such as Google Drive, Meetings, and Documents; Smartsheet; and Newforma.

## Project Management

### THE "FOUR CS" SYSTEM

Project managers will utilize our Four Cs System for successful management:

#### CLARIFY

- » Goals and objectives of Umatilla School District
- » Roles and responsibilities of staff consultants
- » Roles and responsibilities of Design Committee members for each project, prior to commencement of the design process
- » What financial comments can be made by the District administrators and what financial comments require action by the Board
- » How decisions will be made during the design, construction, and closeout phases for each project
- » How decisions will be made to balance the scope of work and budgets
- » How all project budgets will be developed, approved, and updated
- » Lines of communication
- » District standards and education facility specifications for K-12 schools
- » Program schedule
- » Scope and budget for each project, prior to starting the design phases
- » Information control process for the construction phases
- » Quality Assurance/Quality Control program
- » Value Engineering/Lifecycle cost for each project
- » Issue resolution process

#### COMMUNICATE

- » Roles and responsibilities to project teams and District staff
- » Project scope with all project stakeholders
- » Project progress to Board, administrators, staff, students, and community
- » District's Labor Compliance Program to contractors and subcontractors at pre-bid job meetings and pre-construction meetings

#### CONFIRM

- » Project issues have been resolved
- » Documents produced by each project team are informative and accurate
- » Contractors are constructing the projects correctly utilizing QA/QC process
- » Design, permit, and construction phases are on schedule
- » As-built information is accurate
- » Project documentation is properly filed
- » Commissioning process preferred by the District

#### CLOSEOUT

- » Complete punch list
- » Complete functional equipment testing
- » Schedule training for all pertinent staff
- » Use the "Contract Closeout" checklist developed by Cornerstone for each project

## MANAGEMENT TOOLS

We use a number of methods we use to make sure designers, contractors, and vendors don't let items fall through the cracks. A great example of one of these tools is the Site Inspection Log. This tool is used when consultant comes out for inspection, like envelope or waterproofing consultants, and point out specific areas that need to be addressed. Instead of relying solely on the contractor to track these changes during construction, we use the Site Inspection Log to manage these observation items. **This ensures that these items are addressed during construction and not on the punch list.**

## Organizational Tools

### OUR APPROACH AND PROPOSED WORK PLAN

Leadership on K-12 projects requires experience, knowledge, and a proven ability to establish an achievable plan for completion of work. Cornerstone has all of these skills necessary, and we will use these skills to ensure every project is completed successfully. Through our 22 years of K-12 work, we have established a very successful approach in preparing and managing a detailed work plan for both single-project and multi-project capital improvement programs. Described below is our proposed work plan for the District and the expected benefits.

TASK/PROCESS	EXPECTED BENEFIT
<b>Establish a collaborative Bond Management Team (BMT) that meets weekly or biweekly to discuss budget, scope, quality expectations, schedule, and other issues.</b>	Creates a cohesive team that maintains constant focus on safety, equity, and positivity and that collaboratively, efficiently, and effectively addresses issues that affect cost, quality, schedule, and governing agencies.
<b>Prepare a detailed management plan.</b>	Clarifies how we will team with the District regarding the process for addressing and approving financial issues.
<b>Prepare a detailed project budget for approval by the District.</b>	Controls commitments, transfers, expenses, and paid-to-dates.
<b>Prepare a detailed project schedule.</b>	Cooperatively work with team members to develop schedules that will be included in contracts and that will clarify dates for owner decisions.
<b>Provide cash flow forecasting.</b>	Assists the District in maximizing interest revenue.
<b>Select construction method.</b>	Assists the District in selecting the best, most appropriate method.
<b>Prepare detailed RFPs.</b>	Allows for equitable, inclusive, and cost-effective contracts.
<b>Develop a quality control/quality assurance plan.</b>	Allows for meaningful inspections.
<b>Provide detailed contractor outreach.</b>	Provides competitive bids, and presents opportunities for working with local, minority, and emerging firms.
<b>Prepare a detailed information control system.</b>	Allows for timely purchasing, deliveries, and issue resolution.
<b>Coordinate the constructability review.</b>	Improves bid documents and reduces the amount of change orders; allows for District input and oversight; and provides the opportunity to look critically at how design impacts classrooms and individual student groups.

TASK/PROCESS	EXPECTED BENEFIT
<b>Coordinate value engineering.</b>	Reduces the cost of construction, and provides opportunity to review drawings with an equitable lens.
<b>Meeting management and documentation.</b>	Develops and nurtures team environment; resolves issues that could impact cost, schedule, and quality.
<b>Coordinate third-party inspections.</b>	Improves quality of systems and finishes.
<b>Manage the closeout phase.</b>	Provides documentation of closeout requirements.
<b>Coordinate training of new systems with District staff.</b>	Ensures that staff operates systems effectively.
<b>Develop the process to address warranty issues.</b>	Requires the contractor to address warranty issues, at no cost to the District.

## 8. COST OF SERVICES

### b. Fee Schedule

Principal	\$125.00
Senior Manager	\$115.00
Project Manager	\$108.00
Administrative Support	\$45.00

Reimbursable expenses, including but not limited to the following:

- » Mileage (billed at IRS rate)
- » Travel (at cost plus 7%)
- » Shipping charges
- » Printing and printing supplies
- » Special fees, permits, etc.



# APPENDIX:

KEY STAFF RESUMES

## RICK RAINONE

### PROJECT EXECUTIVE/PRINCIPAL-IN-CHARGE

Rick is the Founder and President of Cornerstone Management Group, Inc. He has the distinction of representing owners' interests in construction projects for 34 years, and his experience managing capital improvement programs in Oregon spans 28 years. In this time, he has assisted collaborative teams in preparing management plans—a process to improve bid documents that has saved our clients over \$80 million by focusing on buy out and bid award strategies, ultimately reducing the cost of change orders. He leads lessons learned conferences every year and is proactive in looking for systems and best practices. He implements these lessons learned to improve our teams' experiences and ability to maximize our clients' successes, ultimately benefiting the students, staff, and administration of the school districts we serve.



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#### Relevant Program Management Experience:

- » Sherwood School District
- » Gresham-Barlow School District
- » David Douglas School District
- » Salem-Keizer School District
- » Hillsboro School District
- » Forest Grove School District
- » Philomath School District
- » Banks School District
- » Astoria School District
- » North Clackamas School District
- » Sheridan School District
- » Portland Public Schools
- » Beaverton School District
- » Pleasant Hill School District
- » Woodburn School District
- » Fern Ridge School District
- » State of Oregon
- » City of Forest Grove
- » Housing Authority of Clackamas County
- » Clatsop County
- » Tualatin Valley Parks and Recreation

#### Years with Cornerstone:

21

#### Previous Firms:

Heery International

Milstead and Associates

Joaquin Construction, Modesto, CA

#### Certifications:

Project Management Certification

Project Management Institute,  
Portland, OR

## **JOHN ABEL** LEED AP PROGRAM MANAGER

John joined Cornerstone in 2001 bringing with him valuable general contracting experience constructing new buildings, renovating existing structures, and providing sustaining repair services for some of Oregon's largest corporate clients. With 25 years experience in the industry, John is a valued member of the Cornerstone team and during his tenure at Cornerstone he has tackled and completed some very complex projects including building replacements; additions; renovations; mechanical, security, and safety upgrades; and has developed best practices for the safe execution of construction work on occupied building sites.



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### **Relevant Program Management Experience:**

- » Gresham Barlow School District
  - Sam Barlow High School Addition & Renovations
  - Gresham High School Improvements
  - Gordon Russell Middle School Remodel & Roof Replacement
  - Dexter McCarty Middle School Remodel & Roof Replacement
  - West Orient Elementary School HVAC Improvements
- » Hillsboro School District
  - Glencoe High School Addition & Remodel
  - Rosedale Elementary School New Construction
  - Groner Elementary School Remodel & HVAC Improvements
  - Brown Middle School Addition & Remodel
  - Evergreen Middle School Addition & Remodel
  - Security Vestibule at Multiple Schools
  - Safety & Security Improvements at All Schools
- » St Helens School District
  - St Helens High School Addition & Renovations
- » Newberg School District
  - Newberg High School Addition & Student Based Health Center Remodel
- » Salem Keizer School District
  - Salem Heights HVAC and Roofing Improvements
  - Waldo Middle School HVAC Improvements
  - Myers Elementary School Fire Alarm Replacement
  - Cummings Elementary School Window Replacements
- » Forest Grove School District
  - Joseph Gale Elementary School Replacement
  - Echo Shaw Elementary School Remodel
  - Neil Armstrong Middle School Addition & Renovations
  - Cornelius Elementary School HVAC Improvements

### **Years with Cornerstone:**

21

### **Education:**

Oregon State University, Bachelor of Arts in Construction Engineering Management, Business Minor

### **Previous Firms:**

Baugh Construction Oregon, Inc.

### **Certifications:**

LEED AP

## CASEY CUNNINGHAM LEED AP, CPTED

### SENIOR PROJECT MANAGER

Casey has 21 years experience in the construction industry, and he has worked with the Cornerstone team for the past 10 years. Casey will bring his experience as a builder, project manager, and owner's representative to inform development of a cohesive team amongst all stakeholders, project managers, consultants, and contractors. As Program Manager, Casey will also provide continuity and consistency throughout all phases of the capital bond program. Casey is LEED AP-Certified, CPTED-Certified, and proficient in Microsoft Office, Prolog, Suretrack, AutoCAD LT, and Smartsheet. His education and specific public agency work history make him a valuable asset to the Cornerstone team and a great asset to the District.



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#### Relevant Program Management Experience:

- » Sherwood School District
  - New Sherwood High School
  - Sherwood High School Seismic and Renovation
  - Middleton Elementary Renovation
  - Archer Glen Seismic and Renovation
  - Hawks View Elementary School Transformation
  - Hopkins District Office Transformation
- » Hillsboro School District
  - Poynter Middle School Seismic and Renovation
  - Evergreen Middle School Seismic Renovation and Addition
  - Minter Bridge Elementary School New Gym and Renovation
- » Canby School District
  - Canby High School Addition and Renovation
- » Salem-Keizer School District
  - Kalapuya Elementary School New School
  - Chavez Elementary School New School
  - Battle Creek Elementary School New School
  - Straub Middle School New School
  - Richmond Elementary School Seismic Upgrade
  - Four Corners Elementary School Seismic Upgrade
  - McKinley Elementary School Seismic Upgrade
- » McMinnville School District
  - Memorial Elementary School
  - Adams School Seismic Renovation

#### Years with Cornerstone:

21

#### Education:

Oregon State University, Bachelor of Science in Construction Engineering Management, Minor in Business Administration

#### Previous Firms:

Salem-Keizer Public Schools

P&C Construction

McCarthy Building Companies

#### Certifications:

LEED Accredited Professional (LEED AP)

Crime Prevention Through Environmental Design-Certified (CPTED)

## EMIL HAMEED

### SENIOR PROJECT MANAGER

Emil joined Cornerstone in 2014 and has subsequently overseen 26 school projects. Currently, he is managing a prototype elementary school in Hillsboro at three locations; a remodel of an elementary in North Clackamas; and relocation of the County Jail in Clatsop County. Prior to joining Cornerstone, Emil spent 12 years as a project manager for Payne Construction where he demonstrated his expertise for public and private construction projects. Emil has proven to be a great asset to the Cornerstone team due to his vast experience and collaborative approach to project management.



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#### Relevant Program Management Experience:

- » Hillsboro School District
  - Brookwood Elementary School Replacement
  - North Plains Elementary School New Building
  - South Hillsboro Elementary School New Building
  - Butternut Creek Improvement Project
  - Century High School EFIS Replacement
- » Fern Ridge School District
  - Elmira Elementary School Replacement
  - Veneta Elementary School Addition and Remodel
  - Fern Ridge Middle School Remodel
  - Elmira High School New Gym Addition
  - Fern Ridge District Office Remodel
- » North Clackamas School District
  - Lot Whitcomb Elementary School Remodel and Addition
  - Milwaukie/El Puente Bilingual School Remodel and Addition
- » Gresham-Barlow School District
  - East Gresham Elementary School Replacement
  - North Gresham Elementary School Replacement
  - Powell Valley Elementary School Remodel
  - Kelly Creek Elementary School Remodel
- » North Lincoln Fire & Rescue DeLake Fire Station
- » Columbia River Fire & Rescue St. Helens Station Remodel & Seismic Upgrade
- » Portland Fire & Rescue Fire Station 6 Remodel & Seismic Upgrade
- » Gresham Fire & Emergency Services Station 74/Station 73 Remodels & Seismic Upgrades

#### Years with Cornerstone:

9

#### Education:

University of British Columbia, Bachelor of Science in Biology

Keller Graduate School of Management, Master of Accounting and Financial Management

#### Previous Firms:

Payne Construction

# BECCA VANDEWALLE

## PROJECT MANAGER/BUDGET MANAGER

Becca joined Cornerstone in 2018 after spending years in marketing and business development. In her former role for Zipcar in particular, Becca worked to create and maintain relationships with regional transportation and governmental agencies, as well as many Portland universities. She also worked for 5+ years in construction as a journeyman carpenter and enjoys combining her hands-on construction experience with project management. At Cornerstone, Becca has managed new building additions; mechanical and electrical upgrades; safety and security upgrades; and new and upgraded sports facilities.



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### Relevant Program Management Experience:

- » Gresham-Barlow School District
  - Hall Elementary School Renovations and New Addition
  - Hollydale Elementary School Renovations and New Addition
  - Deep Creek Elementary School Renovations and New Addition
  - Clear Creek Middle School
  - Powell Valley Elementary School
  - Kelly Creek Elementary School
- » Hillsboro School District
  - Mooberry Elementary School Improvements, New Gym, and Modular
  - West Union Elementary School Improvements
  - Century High School Synthetic Turf Field
- » McMinnville School District
  - Evans St. Learning Center Renovations
  - Girls Softball Batting Cage Improvements
  - Duniway Middle School Window Replacements

### Years with Cornerstone:

4

### Education:

Portland State University, Bachelor of Arts in Community Development

### Previous Firms:

Neil Kelly Company

Zipcar

## MARY DOLAN

### PROJECT MANAGER

Prior to joining Cornerstone as a project manager in 2017, Mary was a teacher and administrator in the K-12 sector. Mary spent 10 years managing a teacher placement program at the University of Portland. The time spent managing this program and her background and degree in Business Administration has made her a valuable asset to the Cornerstone team and will lend valuable insight on the Newberg School District projects. Mary has managed multiple school projects in her time with Cornerstone, including modular building, HVAC, and renovation projects.



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#### Relevant Program Management Experience:

- » Hillsboro School District
  - Hillsboro High School Renovation
  - Miller Education Center Improvements
  - Century High School CTE Addition
  - Liberty High School CTE Addition
  - Liberty HVAC and Retro-Commissioning
- » Sherwood School District
  - Sherwood High School Transformation to Sherwood Middle School
  - The Ridges School Transformation to Comprehensive Elementary School

#### Years with Cornerstone:

5

#### Education:

University of Portland, Master of Education

Spring Hill College, Bachelor of Arts in  
Theology and Business Administration

#### Previous Firms:

University of Portland

Holy Cross Catholic School

# McNary Heights Elementary School

## April Board Report 2023



Home of the Mustangs

**Principal: Nicole Coyle Vice Principal: Tim Young**  
**Director of Elementary Programs: Taunya Daniel**

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### Enrollment:

As of April 3, 2023, we have 643 students currently enrolled at McNary.

Enrollment by grade level: Kinder = 99, 1st = 99, 2nd = 97, 3rd = 114, 4th = 109 5th = 125

Last year there were 633 students enrolled at this time.

### April Professional Development:

- **Math Adoption Team Meeting** Friday, April 7th at 12:15
- SBAC Training Modules: Friday, April 7th at 1:15

### Calendar

- Wednesday, April 6th: Spring Class Picture Day
- Wednesday, April 12th: 3rd Quarter MOST Assemblies
- Thursday, April 13th: Earth Day Field Trip
- Friday, April 14th: End of 3rd Quarter. No school MHES Teacher Report Card Day
- Thursday, April 20th: Conferences 1:15-8:00PM
- Friday, April 21st: Conferences 8:00-4:00PM
- Wednesday, April 26th: Administrative Professionals Day

## Vice Principal's Report

### Discipline:

We have had 65 major referrals between 03/01/23 and 04/06/23

- 21 Minors to Major
- 9 Physical Aggression/Fighting
- 12 Insubordination
- 7 Assault
- 3 Threatening
- 3 Harassment

# McNary Heights Elementary School

## April Board Report 2023



Home of the Mustangs

**Principal: Nicole Coyle Vice Principal: Tim Young**  
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- 3 Inappropriate Bathroom Behavior
- 3 Inappropriate Language
- 1 Inappropriate Lunch Behavior
- 1 Inappropriate Use of Technology
- 1 Sexual Harassment
- 1 Bullying

### **SAFETY:**

We had a fire drill on March 21<sup>st</sup> at 8:45am.

### **ACTIVITIES (March):**

**Fab Fridays:** We are wanting to improve attendance, and we are starting with focusing on improving Friday attendance. Every student receives a ticket when they arrive. During the day, the school attendance total is announced, how it compares to the previous Friday's attendance, and what our goal is for the next Friday. I then draw a ticket and announce it over the intercom. The student with the winning ticket can choose up to three friends to eat lunch with me that day.

Friday, March 3: 90% of the students attended.

Friday, March 10: 90% of the students attended

Friday, March 17: 84% of the students attended

Friday, March 24: 85% of the students attended

**McNary Marathon:** For two weeks you could see students running, walking, skipping and jumping around the track at MHES. During this annual event, students were given the opportunity to earn toe tokens for every 10 laps that they completed. Top runners in each grade level are also recognized. While some students

# McNary Heights Elementary School

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only completed a couple of laps a day, the majority of students pushed themselves to complete as many as they could during their lunch recess. Retired teacher and now volunteer Rita McDougall came each day to punch cards in the sun, rain and wind. Mr.Lind, PE teacher, coordinated this school wide event.



# McNary Heights Elementary School

April Board Report 2023



Home of the Mustangs

**Principal: Nicole Coyle Vice Principal: Tim Young  
Director of Elementary Programs: Taunya Daniel**

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# **McNary Heights Elementary School**

**April Board Report 2023**



**Home of the Mustangs**

**Principal: Nicole Coyle Vice Principal: Tim Young**  
**Director of Elementary Programs: Taunya Daniel**

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**Clara Brownell Middle School  
School Board Report  
March 2023  
Anthony Brown  
Dean of Students/Athletic Director**

**Discipline:**

- 3 students served O.S.S. in March.
- 14 in-school suspensions in March.

**Student Activities:**

- First track and field meet is April 7th at Stanfield 10AM.
- Over 50 athletes are currently doing Track and Field this year at CBMS.





Clara Brownell Middle School  
Board Report  
Rick Cotterell

Enrollment 2022-2023									
	Sept	Oct	Nov	Dec	Jan	Feb	Mar	Apr	May
6th	104	99	97	95	98	99	101	99	
7th	114	104	106	107	99	101	103	100	
8th	123	120	118	120	118	122	124	122	
<b>Total</b>	<b>341</b>	<b>323</b>	<b>321</b>	<b>322</b>	<b>315</b>	<b>322</b>	<b>328</b>	<b>321</b>	

## April 2023

With spring break in our rearview mirrors, we enter the sprint to the schoolyear finish line. We have a very busy couple of months ahead, but we also have a lot of learning and fun along the way.

Student leadership has been busy planning for our 3<sup>rd</sup>-quarter honor roll assembly. This time around, honor roll students will have an opportunity to participate in a game of capture the flag. It will be a lot of fun and a great way to celebrate outstanding academic achievement.

Spring also means we are planning our annual trip to Camp Elkanah for outdoor school. Students in 6<sup>th</sup> grade have the opportunity to spend 3 days and 2 nights doing hands-on learning activities in the great outdoors. At this time, we are rounding up permission slips, ordering supplies, and recruiting parent chaperones to help with the trip. We are fortunate enough to receive reimbursement for all outdoor school expenses from the Oregon State University Outdoor School Program.

Spring also means it is time to start working on our master schedule for next year. A team of us were able to participate in professional development around this process earlier this year, and we are eager to put our new tricks to good use. Our hope is to develop the master schedule and have all student schedules complete before the end of this school year. This will make planning for teachers, students, and family a lot easier as we roll into the next school year.

### Upcoming Events:

April 14: End of 3<sup>rd</sup> quarter

April 20-21: Spring conferences

May 8-12: Teacher Appreciation Week

# UMATILLA HIGH SCHOOL



## Board Report

April 2023

### Key Club Blood Drive:

We have not held a blood drive at UHS since before Covid. It was great to see the Key Club and the Red Cross partnership up and running again. Mrs. Erz and her members did a great job organizing and advertising the event. Their goal was to collect 20 units of blood during the drive. They were not sure if they would make the goal prior to the day because they only had 19 donors signed up.

With the support and dedication of all who helped, either by volunteering and donating blood, they were able to surpass their goal and collected 27 units of blood! They have already scheduled a drive for early November and one on February 22, 2024.



### March Madness Attendance Winners:

Our tournament play is done and we have a clear winner. The freshmen class made a clean sweep through the grade levels. They finished the month with 90.03 % attendance. Sophomores placed 2nd with 88.88%. Juniors finished with 83.44% and Seniors made a showing at 80.56%.

To celebrate their win, our freshmen get to go to the movie theater later this month.

## Spring Sports

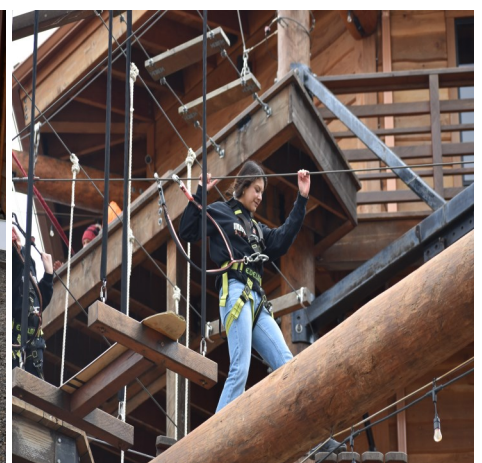
The weather has not been the best, but we are getting teams on the playing fields whenever we can. Here is an update on how they are doing.

Track just competed in the Buck Track Classic in Pendleton on April 7. There were over 700 competitors at the meet. It rained throughout the meet, but we had several athletes get personal bests. We will have our annual home meet on April 21. We hope to see home fans come out and support our kids.

Baseball and Softball both suffered some rainouts last week. Baseball did get a chance to head to the west side of the state to play a game against Westside Christian in Hillsboro. They also had a chance to watch the OSU Beavers play against the U of O Ducks the night before.



Softball completed in the Seaside Spring Break Tournament. One game was canceled due to rain, but they were able to get a chance to complete three more. This is a great team building trip and they got to use money donated from Bill Brown to take in the rope course.



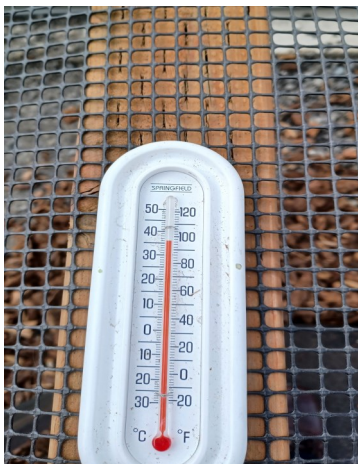
Tennis has been busy on the court. They have had matches against Stanfield, Irrigon, Mac-Hi and Sherman County. Overall, our girls team is 3-2 and our boys team is 1-4. We have a lot of kids out and many of them are just now learning the game and having fun.

Golf is up and running. Our athletes are packing their bags and swinging the clubs. Last Friday, they traveled to Wildhorse's golf course in Pendleton. Just like track, they had to battle through not the best weather. Alyssa Bow had a great outing and tied for 1st place.



### A View from the Greenhouse:

The March cold weather hasn't hurt our strawberries in the greenhouse. They are as snug as a bug with the inside temperature hovering around 96 degrees.



## Umatilla Robotics:

Both our Robotics teams earned a spot at the Pacific Northwest District competition. There are only four schools in the world who have two teams and only 13 out of 50 from Oregon made it to the PNW tournament. We are very proud of our teams. Confidential 4125 was competing for the Impact Award and our freshman team Classified 8532 hoped to build on its two previous consistent performances. After three very tough days of competition, we are sad to say our season has come to an end. Classified finished 40th and Confidential placed 50th out of 120. There are many accomplishments to celebrate this season and we have a great core group that are already talking about what they can do next year.



## **April Maintenance Board Report**

Our whole department have been busy with multiple projects throughout the district. Maintenance have completed the deep cleaning of the cooling tower at the High School and will be turning it on for the season. We have also relocated a couple water backflows within the mechanical room to provide more room for our new heat exchanger, which is used to cool the water within the cooling tower loop supply. Our new heat exchange has been installed and is waiting for the final hook up. We will also be adding a strayer to the new heat exchange to ensure proper maintenance is done. Grounds were able to get the water hooked up to the green house and will be continuing to turn on the water irrigation around the district. I have received training on Verdant which is a web-based service to organize our lead water testing and asbestos testing within the district. The High School library got new carpet installed and looks great! We have finally received good news on our issues with the HVAC system at McNary. After a ton of work, meetings, and site visits, Johnson Controls has agreed on providing us a new wired system. Doing so will eliminate our offline/online alarms that we have been receiving for years. This whole project, has been very important to me and I am glad to see a solution has been presented to us. The custodians have done a wonderful deep cleaning job at all locations, which is greatly appreciated.

# ELD/Bilingual Board Report

April 2023

## ESL & Dual Language

ELPA testing finished this past week. We won't have most results until early May.

My tentative update of the EL plan is now finished. It still needs to be reviewed by staff and community members. After that I will send it to you for approval. The files for the ODE Title III audit were sent in on Friday, April 7.

On March 10, I attended the COSA EL Alliance conference and helped with a presentation on identification of languages of new students, especially students from Mesoamerica who speak a language other than Spanish.

Last week, 29 students in grades 11 and 12 took the STAMP 4S Spanish exam in an effort to qualify for the **Oregon State Seal of Biliteracy**. We have to wait for their speaking and writing portions to be scored, but so far there are 16 students who have passed the other portions, and an additional four others who could possibly pass with a re-test of one section. Since there are already 3 seniors who previously qualified, it looks like we may exceed the number of students who received the award last year. That is exciting!

## Libraries

Battle of the Books is now complete. We had teams compete in the regional competitions. It was a great experience for all and I am really proud of how well they represented Umatilla. In all we had more than 150 students participate, with approximately 80 matches and 600 books read.

I am currently working on the Library Revitalization grant, which will bring up to \$10,000 in library books and resources to our district. One focus for this grant will be on increasing our Spanish book collections, to meet the growing needs of students in dual language classes. Another focus will be on increasing our graphic novel collections.

As usual, if you have any questions or comments, feel free to reach out to me. Thank you!

David Lougee

**APR**

# **STEAM ACADEMY**

**AFTER SCHOOL PROGRAM, 21ST CCLC**

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Stephanie Williams-  
Strege

## **UMATILLA SCHOOL BOARD**

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Dear Umatilla School District Board Members,

The STEAM Academy has been very active the last month! We had the wonderful opportunity to attend the National Afterschool Association conference in Orlando. Tina and I felt that it was beneficial to our professional development and left with many new ideas and strategies. Additionally, we presented a session sharing our internship program. We received positive feedback, it was a great experience.

We finished the third session on Friday, March 24th and began fourth session on Monday, April 10<sup>th</sup>. Session three ended with an author visit, Mr. Lougee organized the visit by Brandon Mull. We had approximately 150 participates in the audience. It was an inspiring presentation; he explained his writing process and was motivating. We're excited to offer some new classes: soccer, Kinder AGAIN, and podcast.

Huge congratulations to both FRC teams, Confidential #4125 and Classified #8532 on their incredible seasons. We were the only district with two teams at the PNW, Impact Award winners and Event Finalist. So much to be proud of! Looking forward to next year.

Sincerely,  
Stephanie

## Board Talking Points

April 2023

Welcome to April! Please consider attending several regional events in the coming months:

**Regional Board/Superintendent Conference** Over the years, we received requests for IMESD to sponsor a board conference for component districts. Although our boards appreciate and value existing OSBA conferences, there exists a desire for eastern Oregon boards to informally network and collaborate on issues specific to local needs. Over the past several months, a subcommittee consisting of superintendents and board members began preliminary planning; we will be asking for additional board feedback to formulate an agenda. We will provide the specifics, including a late summer/early fall date and location, when we confirm logistics.

**Crystal Apple Awards** Our annual event recognizes outstanding staff throughout our region. IMESD sponsors the award ceremony for teachers, administrators, and support staff. The dates are as follows:

- **Union County Crystal Apple Awards**
  - Monday, May 8, Gilbert Center/EOU, 5:00 PM.
- **Umatilla-Morrow Crystal Apple Awards**
  - Tuesday, May 16, Pendleton Convention Center, 5:00 PM. *Please note the day has been moved to a Tuesday this year due to scheduling conflicts.*

## MISSION

To provide outstanding customer service to our school districts in four areas: special education, technology, school improvement, and administrative services.

## VISION

IMESD strives to ensure the success of every child by providing equitable services to close the opportunity gap. We are committed to the values of antiracism and multiculturalism.

# Umatilla School District 6

Code: BDDH  
Adopted: 10/11/95  
Revised/Readopted: 2/11/04; 3/10/22  
Orig. Code: BDDH

## Public Comment at Board Meetings

All Board meetings, with the exception of executive sessions, will be open to the public. The Board invites the district's community members to attend Board meetings to become acquainted with the program and operation of the district. The public has a right to attend public meetings held in open session, and may be invited to share comments, ideas and opinions with the Board during designated times on the agenda. The Board may conduct a meeting without public comment.

Individuals with hearing, vision or speech impairments will be given an equal opportunity to participate in Board meetings and submit written comments to the Board. Individuals requesting assistance, aids or accommodations are encouraged to notify the district at least 48 hours prior to the Board meeting with the request, consistent with Board policy BD/BDA – Board Meetings.

### Procedures for Oral Public Comment

The Board establishes the following procedures for public comment at Board meetings held in open session. The information will be accessible and available to all patrons accessing or attending such a Board meeting.

1. Public comment is limited to its designated place on the agenda and while time allows.
2. A person wishing to provide public comment, if an opportunity is provided by the Board during a meeting open to the public, will complete and submit the Intent to Speak card to the Board secretary prior to the Board meeting.<sup>1</sup> A request to give public comment in-person or electronically does not guarantee time will be available.
3. A person speaking during the public comment portion of the meeting may comment only on agenda items.
4. A person speaking during the public comment portion of the meeting should state their name, whether they are a resident of the district, and, if speaking for an organization, the name of the organization. A spokesperson should be designated to represent a group with a common purpose.
5. A person giving public comment is limited to an established time limit of three minutes. Statements should be brief and concise. If a person has more comments than time allows or is unable to comment due to time constraints, the person is encouraged to submit additional written comments to the Board through the district office as directed.

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<sup>1</sup> When in-person attendees are allowed to provide oral comment, virtual attendees will be afforded the same opportunity.

- Inquiries from the public during the designated portion of the agenda will not generally be responded to immediately by the Board chair, and may be referred to the superintendent for reply at a later date. The Board will not respond to inquiries that are expected to be addressed during another designated portion of the agenda.

The Board will not hear public comment at Board work sessions.

### **Procedures for Written Comment**

Members of the public may submit written comments or materials to the Board at any time at the district office, by mail or by email to [help@umatillasd.org](mailto:help@umatillasd.org). Materials or comments submitted at least 72 hours in advance of a Board meeting will be provided to the Board before the Board meeting, but will not be read at the Board meeting. Written materials or comments submitted may not warrant action by the Board.

### **Comments Regarding Staff Members**

A person speaking during the designated portion of the agenda for public comment may offer objective criticism of district operations and programs. The Board will not hear comments regarding any individual district staff member. The Board chair will direct the visitor to the procedures in Board policy KL - Public Complaints for consideration of a legitimate complaint involving a staff member. Any association contract governing the employee's rights will be followed. A commendation involving a staff member should be sent to the superintendent.

END OF POLICY

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#### **Legal Reference(s):**

[ORS 165.535](#)  
[ORS 165.540](#)

[ORS 192.610 - 192.690](#)  
[ORS 332.057](#)

[ORS 332.107](#)

Americans with Disabilities Act of 1990, 42 U.S.C. §§ 12101-12213 (2018); 29 C.F.R. Part 1630 (2020); 28 C.F.R. Part 35 (2020).

Americans with Disabilities Act Amendments Act of 2008, 42 U.S.C. §§ 12101-12133 (2018).

*Baca v. Moreno Valley Unified Sch. Dist.*, 936 F. Supp. 719 (C.D. Cal. 1996).

*Leventhal v. Vista Unified Sch. Dist.*, 973 F. Supp. 951 (S.D. Cal. 1997).

Oregon House Bill 2560 (2021).

#### **Cross Reference(s):**

BDDC - Board Meeting Agenda

KC - Community Involvement in Decision Making