

Facilities and Operations Committee  
Meeting  
Thursday, September 22, 2022 4:00 PM

Dr. Matthew Prophet Education Center -  
Windows Cafeteria / Conference Room (Floor  
2)  
501 N. Dixon St.  
Portland, OR 97227

## **Agenda**

1. 4:00 pm - Indoor Air Quality Overview
2. 4:20 pm - Tubman Relocation Update
3. 4:35 pm - Office of School Modernization Bond Program Update
4. 4:50 pm - Bond Accountability Committee (BAC) Update
5. 5:05 pm - Climate Crisis Response Policy Overview
6. 5:20 pm - Public Comment - 5 two-minute spots (related to a topic on the agenda) To  
sign-up for public comment  
email [PublicComment@pps.net](mailto:PublicComment@pps.net)  
or call 503-916-3741
7. 5:30 pm - Adjourn

**Date:** September 20, 2022

**To:** Facilities & Operations Committee

**From:** Joe Crelier, Director of Risk Management

**Subject:** Air Quality in PPS Schools

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On Thursday, 9/22, at the F&O committee meeting, staff will present information about air quality in PPS schools. PPS partners with [PBS Engineering and Environmental](#), one of the Northwest's top environmental engineering firms. Representatives of PBS will be available to provide information and answer questions you might have about PPS' air quality practices.

### **PPS Partners with Top Air Quality Experts.**

PBS Engineering and Environmental Inc., founded in 1982, provides professional consulting and project delivery services out of multiple offices throughout the Pacific Northwest, including our primary location in Portland, Oregon. We offer a broad range of services with a staff of more than 290 professionals. Our services include geotechnical, environmental, civil, structural, traffic, and transportation engineering, as well as environmental, industrial hygiene, natural resources, planning, and land surveying services. We pride ourselves in offering quality local staff and responsive services to public and private clients. Our commitment to excellent service at every level of the firm has resulted in the high number of repeat clients, whom we have served for many years.

**Doug Hancock**, Senior Project Manager: Doug is one of PBS' most technically diverse professionals and has an excellent grasp of occupational health and safety issues. He holds the Certified Industrial Hygienist® and Certified Safety Professional® designations. Doug is highly experienced in air quality investigations; water quality studies; environmental soil and groundwater investigations and remediation; and asbestos and lead management. Doug has more than 33 years of experience dealing with the workplace environment, including assessment and control of hazardous waste sites and working around radiological hazards. His knowledge of chemistry and toxicology is critical in supporting PBS' Indoor Air Quality (IAQ) team in their studies of building systems, workplace environments, and manufacturing processes. His ability to assess the client's needs, to develop a sound and cost-effective project approach, and to solicit technical support from engineering and architectural staff when appropriate, has established him as the primary contact for many of our clients.

**Clark Nelson**, Senior Project Manager: Clark holds the Certified Industrial Hygienist® professional designation, He has 19 years of experience as a highly effective operations and project manager for PBS' Portland, Oregon environmental health and safety and industrial hygiene teams. Clark's experience, attention to detail and skillful communication skills grant him the ability to efficiently manage any project and teams. His experience includes federal, state, and local government projects as well as private clients, including infrastructure, industrial, educational, public facilities, and private commercial projects throughout Oregon.

## **Our classrooms are safe.**

- PPS follows the consensus advice of public health experts and meets all standard regulations
- We're regularly reviewing our protocols and systems, with the help of PBS and public health experts, to ensure alignment with industry best practice
- Our **air quality experts** will share considerations they make to determine safe indoor air quality, which includes:
  - The equipment in our buildings, and how we maintain it for optimum performance
  - The portable equipment that can improve air filtration, and how we maintain it for optimum performance
  - The quantity of outside air we can pull in
  - The airflow patterns in our buildings
  - The temperature and humidity we can expect, and how variations and changes might affect airflow
- We continue to seek guidance from public health experts like the Oregon Health Authority.
  - They've informed PPS that they do not advise a set number of air changes per hour and instead advise an array of [best practices](#), many of which we are implementing in our schools and classrooms.

## **We are confident in our air quality practices.**

- PPS follows the consensus advice of public health experts and meets all standard regulations
- PPS increased all building mechanical system filter standards from MERV-8 to MERV-13.
  - The higher the MERV rating the better the filter is at trapping air particles, including airborne bacteria and viruses.

- NOTE: MERV 13 filters help prevent the spread of COVID-19 by limiting the size of virus particles transmitted. However, they negatively impact the air changes per hour in a system due to being a more restrictive filter, slowing air flow. (Learn More: [Air Filter Pressure Drop FAQ](#))
- Every PPS learning space has a portable air purifier.
  - These additional filters help purify the existing air in classrooms while helping increase overall air changes per hour.
  - PPS used more than \$4.6 million ESSER dollars to purchase more than 6,500 purifiers.
- PPS aims to replace every school’s HVAC system with new and upgraded systems.
  - While we expect to modernize all schools over several decades, we’ve made the **first installment** of \$75 million from the 2020 general obligation bond to improve air quality in four schools: **Lent, Bridger, Kelly, Harrison Park**
  - These improvements include a mix of full system replacements and smaller upgrades like mechanical control retrofits. Without exception, these upgrades will improve air quality in classrooms.
- Heat, ventilation, and A/C systems are independently inspected for quality by an outside expert organization on a quarterly basis.
  - Deficiencies are quickly corrected by one of our mechanical engineers.
    - i. EXAMPLE: “Unit ending in 6400 needs belt (1)4L650 and bearings greased. Located in the room next to the cafeteria” or “Unit tag ending in 4318 needs belt (1)AP30 and bearings greased.”
- PPS completed and published a sampling study of indoor air quality in schools throughout 2021.
  - Part of this testing includes spot-checking representative classrooms to verify habitability after the buildings had been shuttered for an extended period.
  - These inspections included visually checking HVAC functionality and measuring CO, CO<sub>2</sub>, temperature, humidity, and airborne particulate levels.
  - These testing efforts closely followed the protocol embraced by Chicago Public Schools and Seattle Public Schools.
- PPS completed and published a year-long sampling of airflow in schools throughout 2021-2022.
  - This study provided a baseline to inform and prioritize upcoming ventilation system improvements like at Lent, Bridger, Kelly, Harrison Park.
  - Airflow testing is expensive and time-consuming, and we used one-time ESSER dollars to accomplish work.

## Air Change Rate

- We agree: how often air changes in a room does matter. But so do all the other elements of ventilation:
  - Maintenance of equipment
  - Amount of outside air supply
  - Airflow patterns between students
  - Spaces between students
  - Temperature
  - Humidity
  - Impact of improved filtration systems like MERV13 and portable air filters
- There are no standards – local, state, or federal – for how often air should change to ensure air quality.
- Interested in learning more about air quality and air change rate?
  - [Oregon Health Authority COVID-19 Public Health Recommendations: Indoor air considerations for smaller spaces](#)
  - [CDC Ventilation in Buildings](#)

## Attachments

- PPS Building Ventilation Infographic



**Cynthia Branger Muñoz**  
Senior Policy Advisor  
**Oregon Health Authority**  
Salem, OR 97301

**VIA EMAIL**

September 19, 2022

Dear Cynthia,

Thank you and your team for all you've done to support Oregon public schools, particularly during the global pandemic. The relationship between public health, especially the Oregon Health Authority ("OHA"), and our schools are critical to ensuring our community remains informed and is better protected against COVID-19 and other infectious diseases.

Thank you for taking my phone call and corresponding via email last week. As I shared with you, *The Oregonian* plans to release a follow-up article to their story "[Below the Bare Minimum](#)." Unfortunately, *The Oregonian* is reporting a particular narrative that suggests that classrooms below three air changes per hour are not safe. To make the argument, they'll quote OHA's Deputy State Epidemiologist, Dr. Ali Hamade, who suggested OHA is "recommending 3 to 6 air changes per hour for schools and all indoor public spaces." Of course, this contradicts what you shared with me earlier in the week that the "OHA is not specifically recommending 3-6 air changes per hour in classrooms."

I believe the source of the confusion is this [2021 OHA document](#). A sub-bullet about the benefits of additional air purifiers notes, "Scientists from the University of Colorado Boulder and Harvard University developed a tool to combine air cleaner and ventilation rate specifications to achieve a desired 3-6 air changes per hour for classrooms."

First, PPS agrees that frequent air changes are critical but not the sole element of good air quality in classrooms. To improve air quality in our schools, PPS has taken unprecedented steps:

- Increased all building mechanical system filter standards from MERV-8 to MERV-13
- Every PPS learning space has a portable air purifier
- PPS aims to replace every school's HVAC systems with new and upgraded ones. We've made the first installment of \$75 million from the 2020 general obligation bond to improve air quality in four schools.
- All heat, ventilation, and A/C systems are independently inspected for quality by an outside expert organization quarterly.
- PPS completed and published a year-long sampling study of airflow in schools to support the prioritization of HVAC system improvements.

Secondly, air quality is much more complicated than air changes per hour and requires a complete view of other elements like:

- Regular maintenance of equipment
- Amount of outside air supply
- Airflow patterns between students; spaces between students



- Temperature
- Humidity
- Impact of improved filtration systems (i.e., MERV13, HEPA filters, etc.)

Unfortunately, *The Oregonian* continues to focus exclusively on air changes per hour, implying that classrooms with less than three air changes are unsafe. **Based on the advice from public health and air quality experts, we are confident that our classrooms are safe.** We are also committed to improving air quality across every school.

We take advice from public health experts seriously, continue making adjustments based on new data and updated science, and apply what we learn to make enhancements in our schools and classrooms. We will always follow local and state directives for health services and infectious disease control.

We need to receive more definitive clarity from OHA on its recommendation and perspective regarding air quality in Oregon classrooms. An ambiguity or conflicting language leads to media coverage or a level of public mistrust. This clarity will help PPS, our staff, and families—and other school districts around the state—understand what they need to consider about air quality and schools:

- What does OHA consider to be the acceptable air quality standard in classrooms?
- Does OHA have a specific air change per hour recommendation for schools?
- Does OHA consider classrooms with a recorded air exchange of less than 3 per hour unsafe? If so, what does OHA recommend schools do to address this issue?
- Based on the steps we've outlined above for improving air quality in schools, are there additional steps we should take to enhance the air quality in schools?

This clarity from OHA will be an essential artifact to reference and share with PPS staff and families. *The Oregonian* has created a narrative among some in our community that our classrooms are unsafe. Your role as a public health expert to clarify what OHA defines as acceptable air quality would help guide school districts and communities. Thank you in advance for your partnership and support in building broader community confidence that keeps our students and staff healthy and safe.

Warm Regards,

**Jonathan Garcia**  
Chief of Staff  
Portland Public Schools

cc: Rachael Banks, Public Health Director, Oregon Health Authority  
Colt Gill, Director, Oregon Department of Education  
Guadalupe Guerrero, Superintendent, Portland Public Schools



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September 22, 2022

**Jonathan Garcia**  
Chief of Staff  
**Portland Public Schools**  
501 North Dixon Street  
Portland, OR 97227

RE: School air quality

Dear Mr. Garcia,

Thank you for reaching out for clarity and additional guidance related to school air quality and ventilation in Oregon's classrooms. Improved indoor air quality is associated with improved productivity and better learning and health outcomes, regardless of COVID-19. Improvements on those conditions can provide benefits extending beyond mitigating infectious disease transmission.

Please see responses to your questions listed below.

**1. What does Oregon Health Authority (OHA) consider to be the acceptable air quality standard in classrooms?**

Airflow and circulation are part of [the recommended layered health and safety measures for schools](#) to reduce spread. The layered safety measures are general recommendations, but not requirements for schools. Airflow, ventilation, HEPA filters and increased circulation are all practices that will reduce the spread of viruses.

In the [Communicable Disease Guidance for Schools](#), an OHA and Oregon Department of Education (ODE) collaborative product updated Summer 2022, we state, "schools should ensure effective ventilation and improve indoor air quality by increasing the amount of fresh outside air that is introduced into the system, exhaust air from indoors to the outdoors, and clean the air that is recirculating indoors with effective filtration methods (e.g., HEPA filters" (p.6)). The guide also includes a link to the [Center for Disease Control and Prevention: Ventilation in Schools and Childcare Programs](#) with suggestions for how schools can implement the recommendations.

**2. Does OHA have a specific air change per hour recommendation for schools?**

OHA promotes best practices that aim to reduce infectious disease transmission by reducing airborne virus-containing particles. The number of air changes is only one layer that schools can apply to that end. Other layers include wearing a mask, and proper hand hygiene. Temperature and humidity also play a role in the survival time of the virus in air. OHA recommends a range

of 3-6 air changes per hour along with implementation of other best practices for public indoor spaces. These multiple measures can considerably reduce particles in the air, some of which can contain viruses. You can find more information here: [COVID-19 Public Health Recommendations: Indoor air considerations for smaller spaces](#).

**3. Does OHA consider classrooms with a recorded air exchange of less than 3 per hour unsafe? If so, what does OHA recommend schools do to address this issue?**

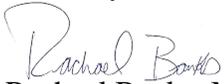
Schools are encouraged to follow best practices as part of a layered mitigation approach to reduce any virus in the air. The number of air changes for an indoor location is one tool in the toolkit to help reduce the risk of COVID transmission and other airborne virus circulation. OHA recommends following layered mitigation practices including masking, opening doors/windows when possible, using fans in windows to blow potentially contaminated air out, and pull new air in through other open windows, as well as using air purifiers.

It is conceivable that not all institutions are able to achieve 3-6 of air changes per hour. Having a lower number of air changes does not mean an automatically increased risk of disease transmission. This depends on the other layers mentioned above, community transmission rates, vaccination status, previous infection, and others. Building administrators can consider all the aforementioned tools when working to reduce the risk of COVID transmission indoors.

**4. Based on the steps we've outlined above for improving air quality in schools, are there additional steps we should take to enhance the air quality in schools?**

Please see the resources listed above for best practices related to improving air quality in indoor spaces, including schools. OHA appreciates the steps that Portland Public Schools has taken to improve indoor air quality in schools.

Sincerely,



Rachael Banks, MPA

Public Health Director

Oregon Health Authority

[Rachael.Banks@dhsoha.state.or.us](mailto:Rachael.Banks@dhsoha.state.or.us)

<http://www.oregon.gov/OHA>



**FORWARD**  
**TOGETHER**

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# Air Quality in PPS Schools

SCHOOL BOARD FINANCE AND OPERATIONS COMMITTEE

September 22, 2022



**We take the health and safety of our students and staff seriously. The air quality in our schools is safe. We continuously review our systems and, if necessary, make changes to keep our community safe.**



**Public health and air quality  
experts agree: Classrooms are safe**



## PPS Efforts

System checks, upgraded filtration

Portable air purifiers

2020 Bond - 75M

Lent, Bridger, Kelly, and Harrison Park



The rate of air changes per hour is useful, but not the sole indicator of good air quality in classrooms.



## Air quality in a classroom is the combination of numerous elements

- Maintenance of equipment
- Amount of outside air supply
- Airflow patterns between students
- Spaces between students
- Temperature
- Humidity
- Impact of improved filtration systems like MERV13 and portable air filters
- Custodial work



## Communications

- Oregon Health Authority
- PPS Families and Staff



Thank you

Q&A

# HARRIET TUBMAN MIDDLE SCHOOL

## (RE)SITING: DUE DILIGENCE V04



2022 AUG 9

# INTRODUCTION

This study is intended to provide a common reference point for all Harriet Tubman Middle School stakeholders. The information in this report supports decision making and, as data is collected, this document will be updated to reflect the most current research.

**Volume 4 provides further analysis of the following site options based upon feedback received at the June 15, 2022 Facilities and Operations Committee meeting:**

- » **BESC Site**
- » **Meek Professional Technical School Site**
- » **Jefferson High School Main Lot (Co-location with HS)**
- » **Jefferson High School South Lot**
- » **Humboldt Site**

Previously considered sites are located in Appendix A.

This analysis is complemented by conceptual site studies completed by Bora Architecture & Interiors and Mahlum Architects. Their respective reports can be found in Appendix C.

# BACKGROUND

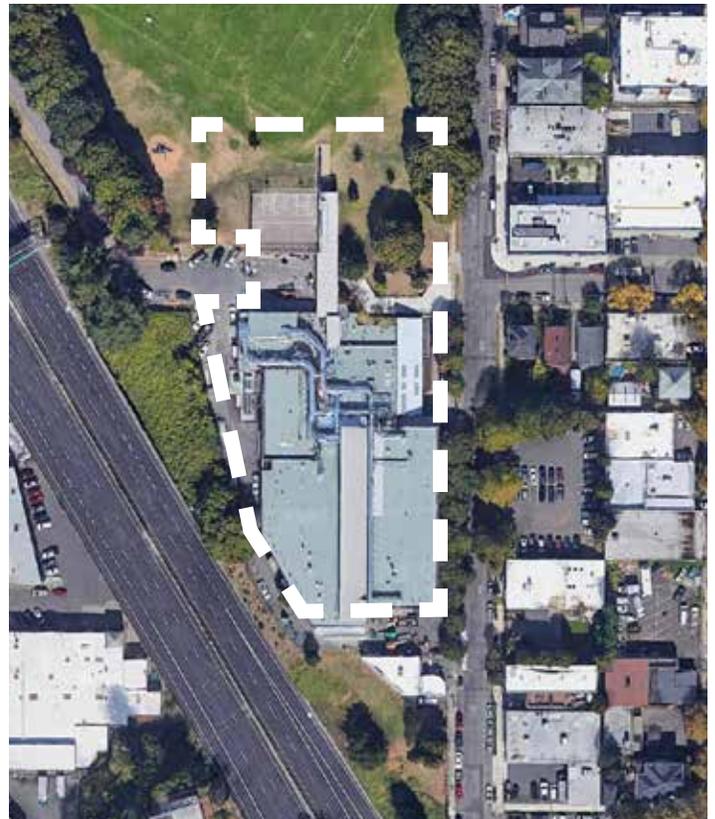
Over the course of decades, the Historic Albina neighborhood — the heart of Oregon’s historic Black community — has experienced harm caused by the construction and presence of the I-5 freeway. Since Black families had their homes and businesses demolished to make way for construction of the freeway and other “urban renewal” projects nearly fifty years ago, the air pollution and increased traffic associated with the freeway have negatively impacted the health of neighborhood residents and their quality of life. The resulting displacement and disinvestment in the Albina neighborhood is part of our community’s shared history.

The Federal-Aid Highway Act of 1956 originally provided funds to construct the interstate, in the process demolishing several hundred housing units and constructing the freeway immediately adjacent to what was then Eliot Elementary, which had opened in 1952. The creation of Harriet Tubman Middle School in the early 1980s at the former Eliot School site has historical significance, as it played a pivotal role in the struggle over school desegregation and racist busing policies in Portland during the 1960s-1980s.

Harriet Tubman has served PPS students in the Albina neighborhood since the early ‘80s, and then in 2018, reopened as a middle school as part of a district-wide Middle School Framework to provide students with a more comprehensive and equitable middle school experience and better preparation for high school. For this framework to be successful long-term, it is essential that students are educated in a building that is not negatively impacted by significant adjacent project construction and longer-term negative impacts from unhealthy ambient air quality, noise, and vibrations.

The location of the freeway directly adjacent to the school has created enduring environmental impacts. Today the exterior area of Harriet Tubman is functionally unusable for school purposes. As currently designed, the proposed I-5 Rose Quarter Improvement Project would further cut into the Harriet Tubman Middle School site, threatening to worsen the environmental situation and negative health impacts, both during construction and over the long term.

The image below is of the existing Harriet Tubman Middle School site and demonstrates the current proximity of the interstate to the school. The interstate expansion will exacerbate existing environmental hardships and threaten the western edge of the site.



# SCHEDULE

Due to the proximity to the site and location of construction access roads, work on the Eliot Viaduct will directly impact the safety and learning of students at Harriet Tubman Middle School. Prior schedules provided by ODOT showed this portion of work beginning in September of 2027; however, ODOT has accelerated the timeline for this work, which has a direct impact on the district's timeline to relocate Harriet Tubman. Recent construction schedules provided to the district from ODOT indicate the Eliot Viaduct work will begin in September of 2026, suggesting the Harriet Tubman students must vacate the current location by August 2026.

The district can use our recently constructed Kellogg Middle School to infer the necessary duration to build a middle school. Kellogg Middle School opened in August of 2021 after four years of planning, design, and construction. The process began in May 2017 with procuring architectural and engineer services. Planning, design, and permitting took approximately two years; construction also took two years.

Comparing Kellogg with the development proposal described above, it's worth noting a number of asymmetries between the processes. First, the district already owned the parcel for Kellogg Middle School. Not all sites currently under consideration are within the district's control. In these cases, the district must negotiate with the current property owner for sale, lease, or trade for the land. If the current property owner is another government agency, there will likely be a public process around the property purchase. District staff estimate a minimum of six months would be required for property negotiations.

To further address potential differences between Kellogg and the current study, the existing zoning for Kellogg allowed school use through a conditional land

use process — a familiar and predictable administrative process for granting land-use approval for schools. Some parcels currently under consideration do not allow school use. These parcels will require comprehensive plan amendments — a process that requires City Council approval. A comprehensive plan amendment is in no way guaranteed. If the district pursues a parcel that does not allow school use, it does so at risk.

Returning to the inferences we can make from the assumed I-5 construction schedule and the timeline from Kellogg Middle School, in order to relocate Harriet Tubman before Eliot Viaduct work begins (based on ODOT's most recent schedule), the district would have needed to identify and begin procurement for design services by August 2021. Additionally, lessons learned from previous projects, including Kellogg, suggest additional time for procurement and planning are prudent, to say nothing of time for scheduling contingencies to address unexpected or unknown site conditions, supply-chain issues, or labor shortages.

Given the accelerated timeline of Eliot Viaduct construction, it is necessary to make use of a swing site, or temporary location, for Harriet Tubman Middle School, while design decisions, community engagement, site selection, and construction are completed for a targeted fall 2027 opening of the permanent school site. This will make it possible to conduct school away from the Eliot Viaduct construction that is slated to occur during the 2026-27 school year. The District will identify potential swing sites that are District-owned and will be available before fall of 2026.

Temporarily hosting school functions in an offsite location is common for capital improvements however temporary homes do not allow for an ideal teaching and learning environment. In order to minimize the time Tubman students, staff and family will need to be housed in a temporary location, the District must identify the final relocation option as soon as possible. Extended delay in identifying and procuring the new site will impact the move in schedule.

# COMMUNITY ENGAGEMENT

We recognize the need to collectively build support and vision for the future of Harriet Tubman school. Empowering students, staff, and community members to collaborate with Portland Public Schools will help create a recommendation on a future site for Harriet Tubman Middle School, and elevate essential needs that can be honored in future educational design planning impacting the Albina community.

The site relocation selection process will be joint with the broader work around the Center for Black Student Excellence, Harriet Tubman Site Selection Committee, and the Jefferson Modernization, which includes the modernization of Jefferson High School. All of which are part of the district's efforts and commitment to Racial Equity and Social Justice as outlined in our PPS strategic Plan - Forward Together.

The design of this engagement process endeavors to engage a diverse set of stakeholders who will make a relocation site selection recommendation to the PPS Executive Sponsors who will make the recommendation to the PPS School Board. Through late fall, PPS staff will hold a series of engagement meetings with the identified stakeholders with the goal of building consensus around a potential future site for Harriet Tubman Middle School based on the input and thought partnership of those stakeholders. Through relationship building and grounding on the context and challenges, stakeholders will utilize a common site selection criteria.

## STAKEHOLDER GROUPS TO BE ENGAGED

### **PPS Students- Harriet Tubman and Feeder Schools**

Affinity Groups  
Directed Outreach

### **PPS Parents - Harriet Tubman, Jefferson, and Feeder Schools**

King PTA  
Harriet Tubman PTA  
Sabin PTA  
Irvington PTA  
Directed Outreach

### **PPS Staff - Harriet Tubman, Jefferson, and Feeder Schools**

Principals  
Teachers  
All staff  
Retired staff

### **RESJ Partnership Organizations - Black Led and with staff at Harriet Tubman, Jefferson, and Feeder Schools**

Self Enhancement Inc  
Coalition of Black Men  
Black Parent Initiative  
REAP  
Kairos  
Maurice Lucas Foundation  
Urban League

### **Black Community Leaders**

Albina Vision Trust  
Directed Outreach

## HARRIET TUBMAN RELOCATION PROCESS: COMPREHENSIVE CALENDAR

RELATIONSHIPS & HISTORY	HEALING, HUMILITY & NEEDS FINDING	INSPIRATION, IDEATE, PROTOTYPE	TEST (Staff Recommendation)
<p><b><u>June-July</u></b> Organize our working relationship with CBE partners to participate at all levels of engagement</p> <p>Site Selection Committee</p> <p>Black Tubman Families Listening Session</p> <p>Tubman Listening Session</p>	<p><b><u>August</u></b> In-school design research/engagement</p> <p><b><u>August-September</u></b> Community engagement series</p> <p><b><u>Mid-Late September</u></b></p> <p><b>Guiding Coalition #1:</b> Scenario Planning on Locations (Tubman specific topic)</p> <p><b>Facilities and Operations Committee Update</b></p>	<p><b><u>September</u></b> In-school design research/engagement</p> <p><b><u>September-October</u></b> Community engagement series</p> <p><b><u>Mid-Late October</u></b></p> <p><b>Guiding Coalition #2:</b> In-depth analysis and site evaluation (Tubman specific topic)</p>	<p><b><u>October-November</u></b> In-school design research/engagement</p> <p><b><u>November</u></b> Community engagement Series</p> <p><b>Guiding Coalition #3:</b> Refine final site selection (Tubman specific topic)</p> <p><b><u>November</u></b> <b>Board of Education votes</b> on site selection of Harriet Tubman</p> <p><b>Facilities and Operations Committee Update</b></p>

# COST ESTIMATES

A cost estimate has been prepared for the purchase of property and construction of a new middle school. Original cost estimates were developed in late 2021 and provided to the State to foster discussion regarding support for Tubman relocation. The 2022 State Investment Request is included in Appendix B. One important thing to note with this cost information is that because no particular site location has been determined yet, it carries with it some uncertainty.

- » **Land** - Purchase of new property estimates are based on current market conditions and will vary widely depending on zoning, location and current site conditions. Costs for land vary widely depending upon the site. Several properties PPS owns, which result in no cost. For sites that would require a purchase for Land, we assumed a Low cost of \$5M/Acre and a High of \$10M/Acre.
- » **Hard Costs** - Hard costs are defined as physical costs associated with construction of a project. The estimates are based on an assumed building area based on PPS' education specification and a dollar per square foot cost range provided by professional construction cost estimators Rider Levett Bucknall (RLB). Low range is based on \$485/SF, High Range is up to \$565/SF. Demolition costs at \$25/SF, if applicable, are additive to these Hard Costs. The \$25/SF cost estimate was also provided by RLB. Because no site has been identified, this cost category carries with it significant unknowns including the area of the site, the final size of the building(s), new construction versus renovation, and more. Below is a sample of hard cost estimates.

Building SF	Cost per SF	Hard Cost
120,000	\$485	\$58,200,000
120,000	\$565	\$67,800,000

- » **Soft Costs** - Soft costs include indirect project expenses including (but not limited to) architecture and engineering fees, land use

and building, permitting, testing & inspection, surveying, and other consultants. The estimates are based on recent PPS capital projects.

- » **FF&E** - Includes costs for new furniture, fixtures, and equipment/technology to outfit a new middle school. The estimates are based on recent PPS capital projects.
- » **Site Development** - Cost includes estimates necessary to complete all on-site and off-site improvements including (but not limited to) clearing and grading, parking and circulation, field improvements, new utility infrastructure, and street and other ROW improvements that may be required. Because no site has been selected, this cost category carries with it many significant unknowns. The estimates are based on recent PPS capital projects. The cost percentage ranged from 10% to 18% depending upon the perceived risks for each site.
- » **Swing Site** - It was assumed, based on ODOT's original schedule, that a swing site was not going to be needed. However, ODOT's schedule has now been accelerated, and a swing site looks to be more of a necessity. Swing site costs are included in the cost ranges provided below.
- » **Administration** - Includes costs associated with management of the project including owner's representation services, construction management services, insurance, and other related costs. The estimates are based on recent PPS capital projects.
- » **Contingency** -15% contingency is held for design/owner changes, and unforeseen conditions.
- » **Escalation** - The escalation cost information was obtained from Rider Levett Bucknall (RLB), and it varies year over year based upon projected inflation rates. Current forecasts estimate 7% - 8% annual cost increases across all trades. RLB

calculated the comparative cost increase in Portland from January 2021 to January 2022 at 8.40%. Given the current volatile inflationary environment, there is a lack of confidence at accurately predicting future escalation rates. The escalation rate(s) are projected to the approximate midpoint of construction. There are many variables and decisions that have yet to be made which affect the overall schedule for this work. The below table illustrates the compounding effects of annual cost escalation.

Escalation Rates					
2022	2023	2024	2025	2026	2027
N/A	8.0%	7.0%	6.0%	5.0%	4.0%
\$100	\$108	\$116	\$122	\$129	\$134

- » **State Investment:** It's important to understand the State of Oregon decided to fund the project below the bottom end of the cost estimate range as outlined in the State Investment Request document the District provided to the State. This document is included in the Appendix B, and is linked here: [STATE INVESTMENT REQUEST](#).

# PROGRAM REQUIREMENTS

## MIDDLE SCHOOL EDUCATIONAL SPECIFICATIONS

Created in 2014, the Portland Public Schools Educational Specifications (Ed Spec) represent a foundation on which planning and design work can begin; it outlines desired building characteristics for all district schools. The intent of the Ed Spec is to provide spaces for 21st-century teaching to occur while providing flexibility to adapt to future changes. The Ed Spec area program identifies the quantity and size of spaces within a middle school needed to deliver the district’s education program. This study interprets Ed Spec to meet site-specific constraints and program needs.

### SUMMARY

The current education specifications for a middle school require the site and building to support up to 675 students. The newly constructed Kellogg Middle School has been used as a baseline for comparing the different site options, which has 6 acres and a 104,000 SF building. This is on the lower end of the range from a space requirement perspective in meeting the District’s program requirements. An ideally sized site would be closer to 9 acres and a 120,000 SF building.

EXISTING MIDDLE SCHOOLS: BUILDING & SITE DATA			
SITE	SITE AREA (ACRES)	BUILT AREA (GSF)	CLASSROOM COUNT
BEAUMONT	5.7	91,294	34
DA VINCI	10	88,659	25
GEORGE	7.3	76,142	31
GRAY	13.2	74,614	26
HARRISON PARK	5.4	110,775	39
HOSFORD	6.7	88,532	32
JACKSON	36.4	219,281	40
KELLOGG	5.8	108,110	33
LANE	9.1	94,753	39
MT. TABOR	7.4	79,477	31
OCKLEY GREEN	5.2	74,018	31
ROSEWAY HEIGHTS	8.5	103,610	39
SELLWOOD	4.8	87,364	30
TUBMAN	3.1	87,610	33
WEST SYLVAN	13.6	108,187	40

### Building Program Requirements:

- » General education classrooms
- » Main gym is able to support a full student assembly
- » An auxiliary gym is optional, but not required.
- » Covered play area
- » Cafeteria & Commons area
- » Exploratory areas (music, art, computer lab, steam lab, kiln room, dance)
- » Media/technology area
- » Storage areas
- » Locker rooms & PE offices
- » Administrative spaces
- » Counseling spaces & SPED
- » Community & partner spaces
- » Health clinic
- » Building support spaces

### Site & Outdoor field Requirements:

- » Separate Bus Drop-off area
- » Parking area for staff and parking area for visitors to be separate if possible
- » (1) Softball field
- » (1) Soccer field (can overlay the softball field)
- » Play/practice area for baseball and running trail
- » Play equipment area
- » Hard Surface play area

# CRITERIA & OPPORTUNITY SITES

The purpose of this section is to facilitate dialogue around both the selection criteria and viability of each site as a potential new site for Harriet Tubman Middle School. The intent is to provide a common reference point for all stakeholders. As this study progresses, this document will be updated to reflect current considerations, including community input.

As a starting place, district staff have defined an initial set of criteria to help rank each study site. These criteria are not exhaustive. Instead, they serve as an initial filter to narrow the field of potential sites.

The purpose of these criteria is to:

- » Structure dialogue around priorities
- » Provide a shared reference point for stakeholders to express their values
- » Discover where interests converge
- » Provide transparency to the decision-making process
- » Balance variables across stakeholders

District staff will seek input from the community on the criteria on an ongoing basis. These criteria will evolve with input from stakeholders at this time. The district will collaborate with the community to apply these criteria until a narrow set of sites is identified.

The following list of sites documented here are the main viable candidates for a new location for Harriet Tubman. This list is not exhaustive; some sites have been eliminated prior to the issuance of this draft. Our collective work is to narrow the field of potential sites to better focus district resources for more involved studies. The criteria discussed for each site are outlined below. To be sure, these criteria are not exhaustive. Instead, they serve as an initial filter to narrow the field of potential sites to better focus district resources for more involved studies.

## COMMUNITY CONSIDERATIONS

**Student and neighborhood demographics:** The ideal site will take into consideration both the current and historic racial demographics of students and surrounding neighborhood. Staff and community will evaluate the risk of a proposed site exacerbating neighborhood gentrification and displacement for communities of color. To evaluate this risk, staff and community will specifically review the demographic impact of each proposed site to ensure that current concentrations of students of color are not lost.

**Neighborhood Accessibility:** The ideal site will take into consideration the ability of families of color to access the neighborhood and school site proposed. Staff and community will evaluate housing affordability, neighborhood and community amenities to ensure that students and families of color will be able to access the proposed site.

**Tubman Catchment Boundary:** Feedback from stakeholders, community and staff have consistently raised concerns about permanently relocating Tubman to outside the existing catchment area. Siting Tubman outside the current boundary raises fundamental questions regarding likely future enrollment and boundary changes that the District cannot foretell. Lacking the ability to accurately predict future changes is a significant concern for many stakeholders. Additionally relocating outside the current catchment would place all, or the majority of, Tubman students outside reasonable walking distance and necessitate busing of nearly the entire school population. The impression of whole program bussing and the operational implications of this effort are material and problematic to many community members. Based upon this feedback, Staff do not recommend relocating Tubman outside the existing catchment boundary.

## LOCATION

The ideal site will be located within the existing HTMS catchment area to minimize the impact to students, the community and PPS operations. Sites located outside the HTMS catchment area will likely experience access issues and require middle school and high school boundary change considerations (which in turn will likely add time to the overall project schedule). The further the site is outside the existing HTMS catchment area the larger the potential concern.

## SITE SUITABILITY

The ideal site will be close to 9 acres in gross area to accommodate all desired site amenities including onsite parking, outdoor recreational space, athletics, bus and vehicle circulation, etc. The smaller the site the fewer site amenities and/or increased cost to design around site challenges. The ideal site will be located within an established residential neighborhood with easy walkability, accessibility, access to transit and consistent with the District Safe Routes to School (SRTS) goals. Sites that are along busy roads, within commercial or industrial business areas or are otherwise hard to get to are less preferred. Ideally the selected site will accommodate a three story building while providing for appropriate outdoor space.

## DEVELOPMENT AVAILABILITY (TIME)

The ideal site will have a high likelihood of being ready for development in time to meet the goal of relocating HTMS for the beginning of school in Fall 2027. Sites not currently under PPS control need to be identified by May, 2022 and able to be under PPS control by Fall 2022 with the ability to break ground by June 2025. Sites that have many development impediments, unique complexities or unknowns (complex multi-tiered development, unestablished partnerships, etc) are at higher risk to not be available for development in time.

## OPERATIONAL SUSTAINABILITY

The District is committed to Sustainability and the ideal site will activate underutilized properties and have minimal impact on both the environmental and ongoing operational resources. Additionally, the significant decline in enrollment in the HTMS catchment area should inform the site selection such that robust and sustainable educational resources may flourish in the community. Very often the time of the most negative environmental impact of a building is when it is demolished so a site that does not require significant demolition is preferable. Further, relocating HTMS to an underutilized District property will minimize ongoing operational costs.

## COST CONSIDERATIONS

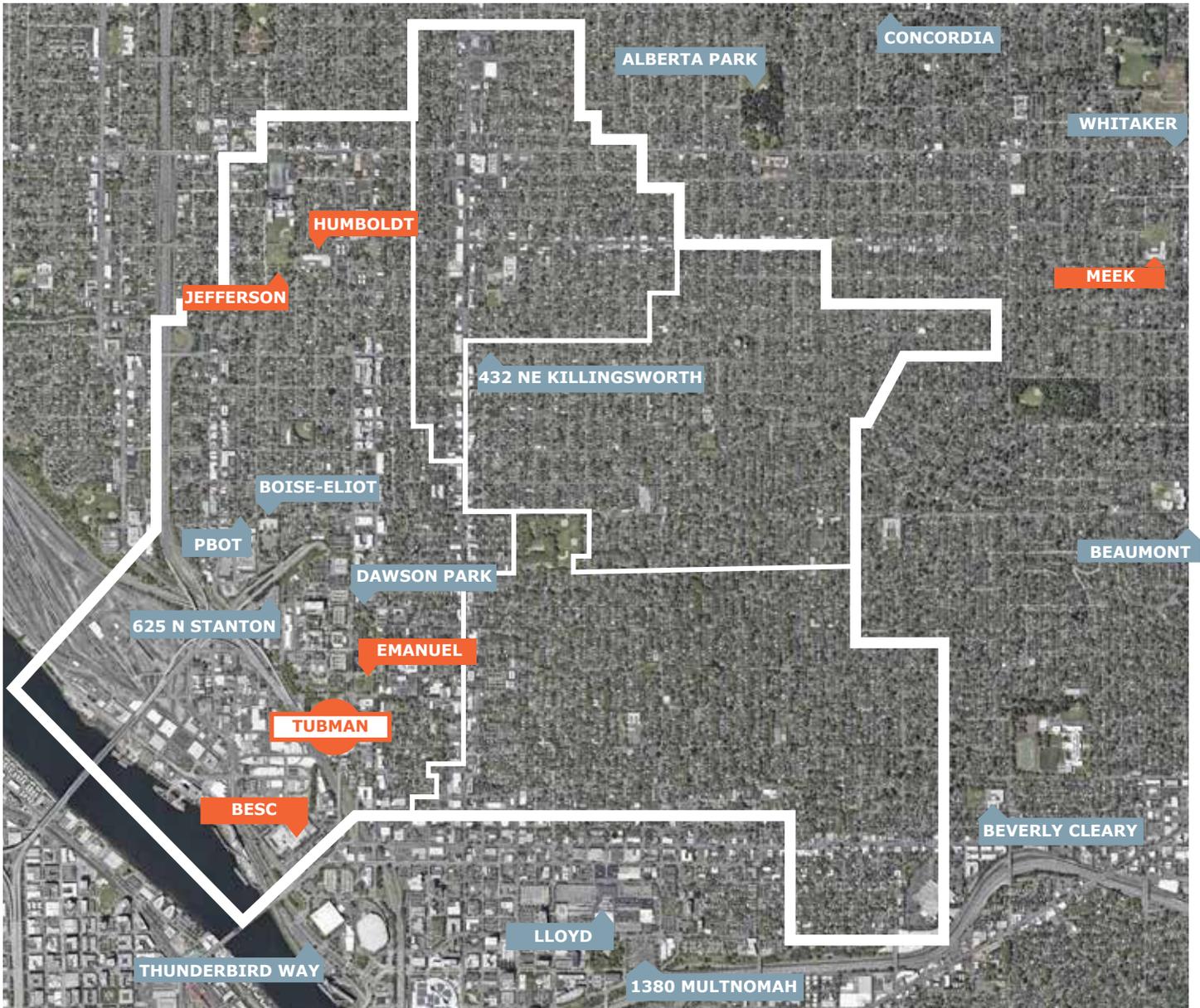
Conceptual cost estimate categories and assumptions are listed on page 7-8 of this document. We have listed cost considerations for each of the viable sites that we believe are unique to the site, or are something to take note of. This is intended to help provide some additional information to consider when comparing the different sites.

## ACADEMIC SUITABILITY

The ideal site will be large enough to accommodate the full middle school Education Specifications and a target enrollment of 675 students. The school will have sufficient space for students to engage in a variety of robust 21st century learning experiences including classrooms, media center, gymnasium and exploratory learning in science, technology, engineering, art and mathematics (STEAM) disciplines. These areas may include specialized rooms such as dance studios or maker space. The school will also have a common space where the entire student population can gather for school-wide events such as assemblies or performances. Middle schools are also adjusting to increasing minutes for physical education as required by the state, this means that there will be greater demand for gymnasium use during the school day. Schools will need to be located on sites that can utilize covered outdoor play areas to flexibly meet these changes.

# HARRIET TUBMAN MIDDLE SCHOOL CATCHMENT AREA

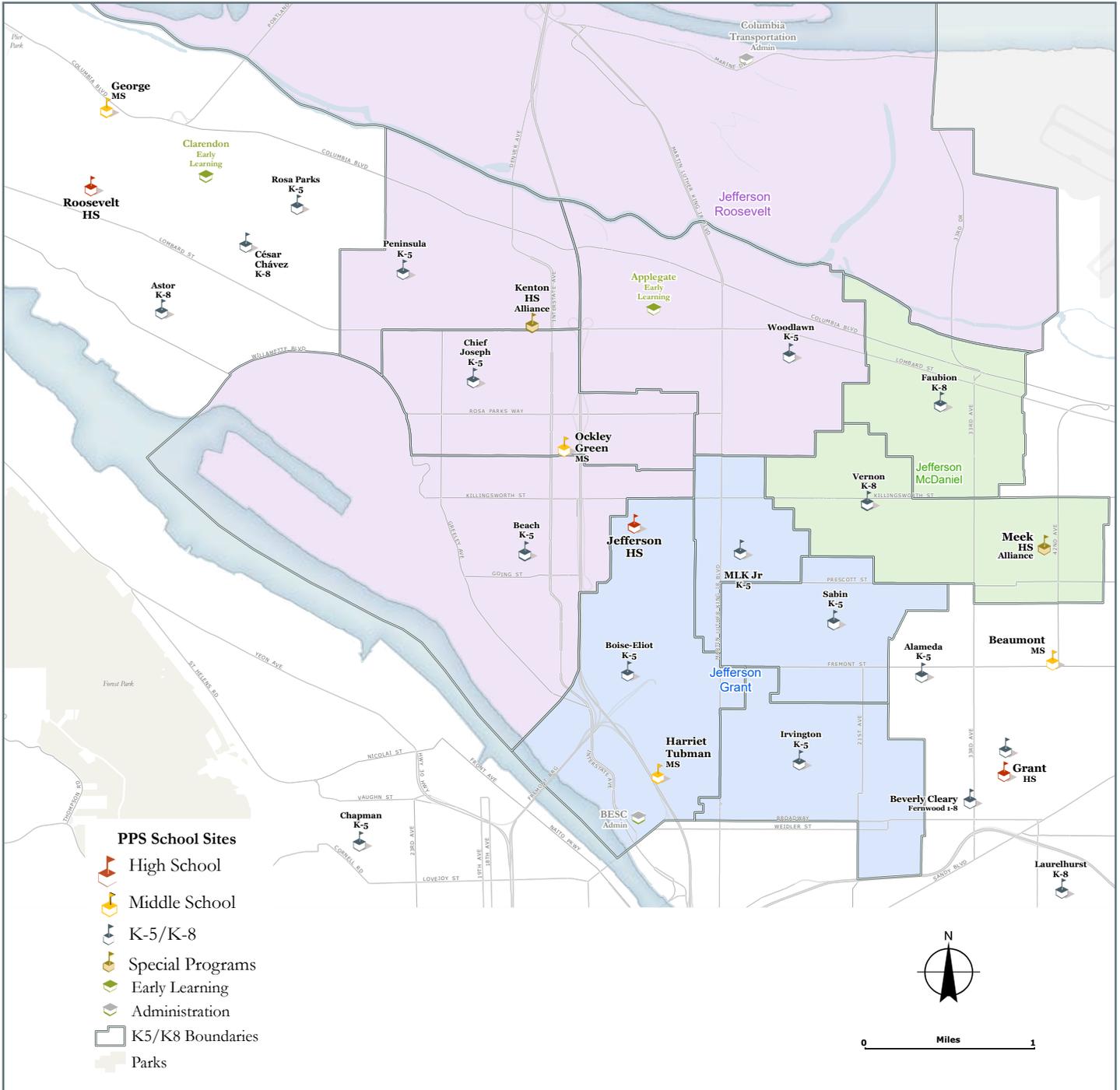
KENTON



**NOTE:** The plans and diagrams on the following pages are shown for illustrative purposes. The intent of the diagrammatic plans are to illustrate an example of how a new middle school could potentially fit on the site. The plan is conceptual and does not include detailed land use or design review.

# JEFFERSON HIGH SCHOOL CATCHMENT AREA

(Includes all feeder school boundaries)



## SITE CRITERIA SUMMARY MATRIX

	Criteria						
	Community Consideration	Academic Suitability	Location	Site Suitability	Availability (Time)	Operational Sustainability	Cost
<b>Under Consideration</b>							
BESC		+	+	0	-	0	-
Meek Prof Tech School		+	-	+	+	+	+
Jefferson High School (South Lot)		-	+	-	-	+	+
Jefferson High School (Main Lot)		-	+	-	-	+	0
Humboldt + JHS South Lot		+	+	0	-	+	+
<b>Previously reviewed. Not considered viable. Not under current consideration</b>							
432 NE Killingsworth			+	0	-	-	-
Boise Eliot Elem			+	0	+	+	+
Concordia University Site			-	+	-	-	-
Emanuel			+	-	-	-	-
Irvington Elem			+	0	+	+	+
Jefferson High School (Main Lot)			+	-	-	-	0
Kenton			-	0	+	+	+
Lloyd Center			0	-	0	-	-
Martin Luther King Elem			+	0	+	+	+
N Stanton			+	-	0	-	0
NE Multnomah			0	+	0	-	-
PBOT Yard			+	-	0	-	0
PP&R (ALBERTA, DAWSON, IRVING)			+	+	0	-	+
Sabin Elem			+	0	+	+	+
Thunderbird Way			+	-	-	-	0
Whitaker-Adams			-	+	+	+	+
<b>KEY</b>							
+ Positive Site Evaluation							
- Negative Site Evaluation							
0 Neutral Site Evaluation							

# HARRIET TUBMAN MIDDLE SCHOOL

**ADDRESS**

2231 N FLINT AVE

**CONSTRUCTION DATE**

1952 (PRIMARY)

**CURRENT OWNER**

PORTLAND PUBLIC SCHOOLS

**LEVELS**

2

**BLDG AREA**

87,610 SF

**SITE AREA**

3.05 ACRES

**CLASSROOM COUNT**

33

**CAPACITY**

732 STUDENTS

**2021-22 ENROLLMENT**

388 STUDENTS (TOTAL)

35 (MANDARIN)

353 (NEIGHBORHOOD)

**ZONING**

CM3 COMMERCIAL MIXED USE 3



# BESC

**ADDRESS**

501 N. DIXON ST

**CONSTRUCTION DATE**

1979

**CURRENT OWNER**

PORTLAND PUBLIC SCHOOLS

**SITE AREA**

10.15 ACRES

**ZONING**

EX - CENTRAL EMPLOYMENT

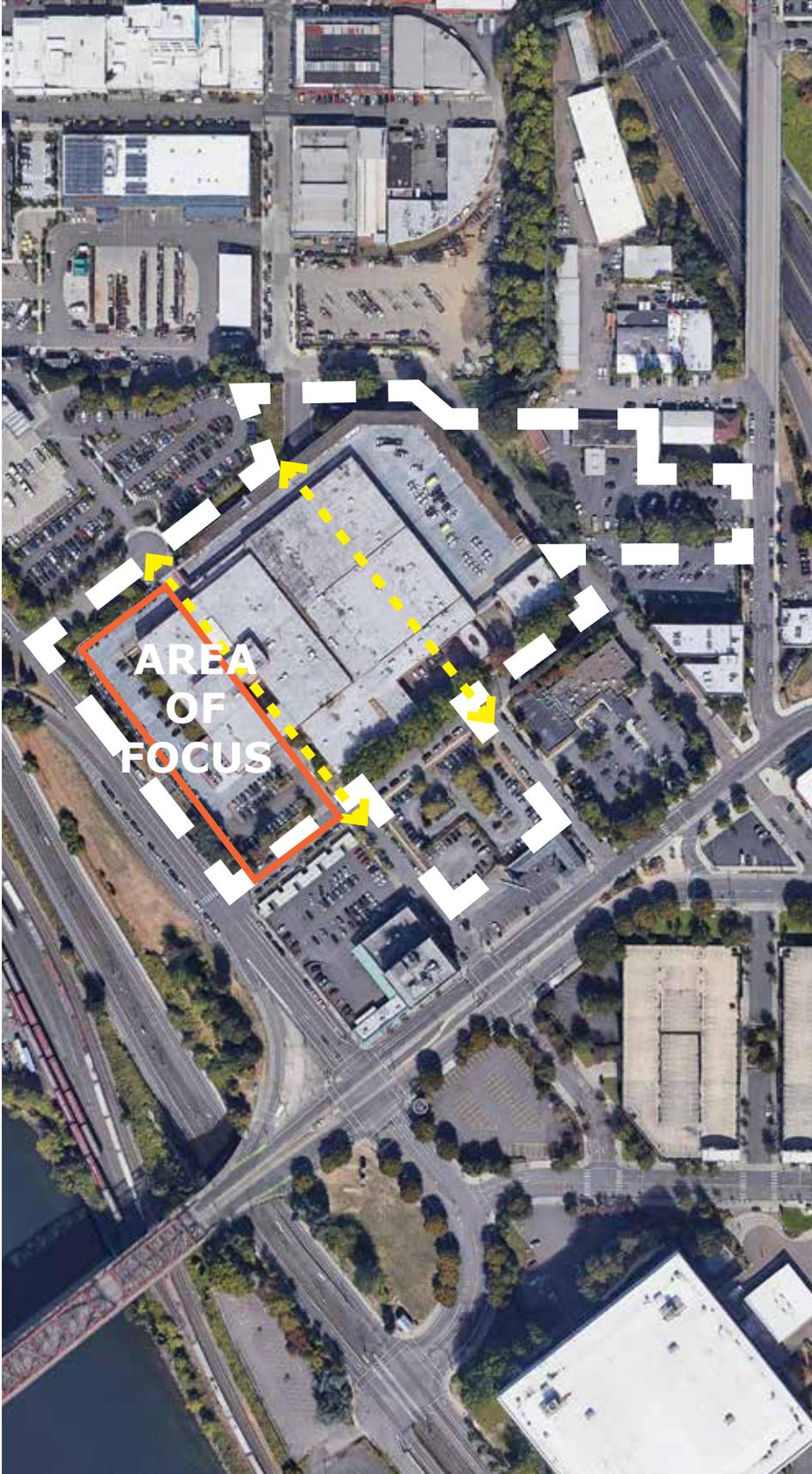




Image by: Mahlum Architects

## COMMUNITY CONSIDERATIONS

- » Families express the future of the BESC’s surrounding neighborhood needs to be clearly defined
- » Acknowledgement that option is in catchment area, meanwhile not a desirable option for engaged families
- » Additional community input will be received in ongoing engagement sessions.

(see conceptual drawing).

- » The nearest residential area is to the northeast surrounding Irvington Elementary School.
- » I-5 is nearly contiguous to the northeast portion of the site, albeit in an area planned to be covered in the forthcoming freeway expansion.
- » Zoning: the BESC site is zoned Central Employment (EX); schools are allowed outright on this site. No conditional use review would be necessary.
- » The area to the north of the parcel is zoned for industrial use; to the south, the zoning is intended to support high-density commercial use.

## LOCATION

- » BESC is located in the southwest region of the Harriet Tubman Catchment area.

## SITE SUITABILITY

- » With over 10 acres of land, BESC contains sufficient land area to support a middle school program.
- » The pedestrian infrastructure reflects the site’s industrial past and new development would likely re-establish the connections to the neighborhood

## DEVELOPMENT AVAILABILITY (TIME)

- » Before building a middle school at the BESC site, the existing administrative functions would need to be relocated to another site(s). BESC currently supports nearly 600 district employees as well as County staff in the portion of the building leased to Multnomah County. District services supported in the building range from educational support staff (e.g., program directors, administrative coaches, and the like) to instructional material storage in the warehouse.

- » To be sure, BESC is the district’s largest building at 361,000 square feet. A suitable replacement site or, more likely, multiple replacement sites would need to be identified, funded, acquired (lease or purchase), and improved for the relocation of district staff before construction on a new middle school could begin.
- » Locating, procuring and improving locations for the District’s administrative and operational functions will require complex and lengthy real estate decisions with no prescribed timeline. If new locations for current BESC users and functions cannot be secured in time to meet the current timeline, Tubman students will be required to stay in a temporary location longer than 1 year. If new locations for current BESC users and functions cannot ultimately be secured, the Tubman relocation process will need to begin anew.
- » This risk is highlighted below in the schedule table.

**OPERATIONAL SUSTAINABILITY**

- » Locating Harriet Tubman middle school on the BESC site utilizes existing district assets, and so is efficient in this regard, however, relocating the various administrative functions introduces necessary downstream real estate requirements. The existing administrative and operational functions would need to be supported at another location, albeit with a potentially smaller footprint for some staff as remote work considerations may persist beyond the pandemic.
- » Construction of a new middle school at this site would require demolition of a large building and all new construction.

**COST CONSIDERATIONS**

**Conceptual Cost Estimate Ranges: \$169M to \$196M.**

- » Base cost estimates assumptions are outlined in the COST ESTIMATES section. Unique site cost considerations include:

**LAND**

- » The District already owns the property, no land purchase costs are estimated. (- \$)

**HARD COSTS**

- » It’s assumed a new building would be built as opposed to renovating the existing. The building is very large at 361,000 SF, and will require extensive demolition, abatement, and site restoration to get it to a suitable condition for building new. (+ \$)

**SITE DEVELOPMENT**

- » We Anticipate extensive public ROW work to make it suitable for a school that is located near an industrial area and major vehicle thoroughfares. We also anticipate the PBOT will require reconnecting the street grid through the property. (+ \$)

	BESC COST ESTIMATE RANGE		
	%	LOW	HIGH
LAND		NA	NA
HARD COSTS		\$68,742,200	\$80,073,000
SOFT COSTS	15%	\$10,311,330	\$12,010,950
FFE	10%	\$7,905,353	\$9,208,395
SITE DEVELOPMENT	18%	\$15,652,599	\$18,232,622
SWING SITE X 2	5%	\$4,347,944	\$5,064,617
ADMINISTRATION	4%	\$4,278,377	\$4,983,583
CONTINGENCY	15%	\$16,685,670	\$19,435,975
ESCALATION	VARIES	\$40,973,903	\$46,955,331
TOTAL		\$168,897,376	\$195,964,474
<b>ROUNDED TOTAL</b>		<b>\$169,000,000</b>	<b>\$196,000,000</b>

**ADMINISTRATIVE RELOCATION**

- » The provided cost range excludes costs to relocate current BESC users and functions. The District is currently working with a 3rd party consultant to update this analysis, which is anticipated to be complete by early Fall.
- » Costs to relocate administrative functions and construct a new Tubman MS on the current BESC site will far exceed the \$120 million provided by the State. Sale of portions of the BESC site (unused for the new school) and/or the current Tubman property could support offsetting costs.

## ACADEMIC SUITABILITY

- » The BESC site allows the ability to construct a school to meet all middle school education specification requirements. Interior spaces would support middle school programming and a target enrollment of 675 students. Exterior spaces would accommodate the covered play area and the fields.
- » Preliminary site plans indicate the site may be bifurcated by a new public street, careful planning would be necessary to ensure students do not need to cross a street during recess.

carries significant risk, including the unknown feasibility that suitable locations can be found and procured for existing BESC functions and the associated costs or BESC relocation.

## RECOMMENDED NEXT STEPS

- » Continue analyzing the BESC site as a potential relocation option for Tubman.

## FURTHER CONSIDERATIONS

- » Albina Vision Trust (AVT) has a Right of First Offer (ROFO) in the event the district chooses to sell. Additionally, there is a 99-year lease with the County which is subservient to the AVT ROFO but should AVT pass on the opportunity, the County is next in line so there are timing and legal complexities.

## SUMMARY

- » The BESC site incorporates beneficial characteristics including sufficient acreage and location within the current Tubman catchment area. However development of the BESC also

BESC CONCEPT SCHEDULE	2022	2023	2024	2025	2026	2027
Site Selection						
Property Negotiations						
Property Due Diligence						
<b>Relocate Existing Programs/Departments*</b>						
Procurement						
Master Planning						
Design						
Construction						
Swing Site						
Tubman MS Opens						

\* Schedule Risk: Creating a plan and implementing it to relocate several District programs is a critical task that contains schedule impact risks.

# MEEK PROF TECH SCHOOL

**ADDRESS**

4039 NE ALBERTA CT

**CONSTRUCTION DATE**

1953 (PRIMARY)

**LEVELS**

1

**BLDG AREA**

35,945 SF

**SITE AREA**

5.38 ACRES

**CLASSROOMS COUNT**

16

**CAPACITY**

441 STUDENTS

**ZONING**

R5 RESIDENTIAL 5,000 CU





**MEEK PLAN DIAGRAM - RENOVATE EXISTING**



**MEEK PLAN DIAGRAM - BUILD NEW SCHOOL**

Images by: Mahlum Architects

## COMMUNITY CONSIDERATIONS

- » Meek will not work for many Irvington families due to increased distance
- » Boise-Elliott expressed Beaumont or Ockley Green is a better MS options than Tubman for many families, with the proposed site options
- » With this option, a large bussing implication is anticipated for families at multiple feeder schools
- » Additional community input will be received in ongoing engagement sessions.

## LOCATION

- » Meek is located less than a mile from the eastern edge of the existing Harriet Tubman catchment area.

## SITE SUITABILITY

- » With over five acres, Meek would be one of the smallest middle schools in the district portfolio (only Tubman and Sellwood are smaller) but could support middle school programming with careful site design and early consideration of athletics space requirements.
- » The site is embedded within a predominantly single-dwelling zone, with a commercial core one block to the east. The pedestrian network surrounding the site reflects its residential character. Meek is well-connected to the surrounding neighborhood by existing sidewalks and low-traffic streets.
- » Zoning: the Meek site is zoned R5 Residential 5,000 CU. Single-family zones have development restrictions - including building size maximums, lot coverage maximums, building setbacks and overall height limits, to name a few - that restrict the size and shape of buildings in the zone. Schools are not allowed by right on this site. A conditional use review would be necessary.

MEEK CONCEPT SCHEDULE	2022	2023	2024	2025	2026	2027
Site Selection						
Property Negotiations						
Property Due Diligence						
Relocate Existing Programs						
Procurement						
Master Planning						
Design						
Construction						
Swing Site						
Tubman MS Opens						

### DEVELOPMENT AVAILABILITY (TIME)

- » The Alliance program currently uses the building. Once Alliance relocates to the Benson campus in August 2024, Meek will be available.

### OPERATIONAL SUSTAINABILITY

- » Locating Harriet Tubman middle school on the Meek campus would realize some operational savings by utilizing an underutilized district asset. Meek is undersized and would require additional square footage to house a middle school. The overall Facility Condition Index (FCI) - the ratio of a building’s maintenance costs relative to the cost of replacing the building at current construction costs - is .09 (which is considered “fair” condition), suggesting renovation with a new addition is the likely construction option.
- » Being located outside the existing catchment area will necessitate additional bussing for all of, or most of, the school population.
- » Locating a school outside the existing catchment area necessitates consideration of realignment of school enrollment boundaries. School enrollment changes are lengthy, complex processes that require thoughtful analysis of all outcomes and robust stakeholder engagement. The district is unable to predict future enrollment changes if Tubman is to be relocated outside the existing catchment area.

### COST CONSIDERATIONS

#### Conceptual Cost Estimate Ranges: \$140M to \$166M

- » Base cost estimates assumptions are outlined in the COST ESTIMATES section. Unique site cost considerations include
  - » **LAND**
  - » The District already owns the property, no land purchase costs are estimated. (- \$)
  - » Alternative athletic venue(s) would need to be located and potentially leased due to the relatively small land area. (+ \$)

	MEEK COST ESTIMATE RANGE		
	%	LOW	HIGH
LAND		NA	NA
HARD COSTS		\$60,217,354	\$71,382,623
SOFT COSTS	15%	\$9,032,603	\$10,707,393
FFE	10%	\$6,924,996	\$8,209,002
SITE DEVELOPMENT	12%	\$9,140,994	\$10,835,882
SWING SITE	5%	\$4,265,797	\$5,056,745
ADMINISTRATION	4%	\$3,583,270	\$4,247,666
CONTINGENCY	15%	\$13,974,752	\$16,565,897
ESCALATION	VARIES	\$33,332,877	\$39,051,706
TOTAL		\$140,472,642	\$166,056,913
<b>ROUNDED TOTAL</b>		<b>\$140,000,000</b>	<b>\$166,000,000</b>

## ACADEMIC SUITABILITY

- » The Meek site allows the ability to construct a school to meet all middle school education specification requirements. Interior spaces would support middle school programming and a target enrollment of 675 students.
- » Consideration of covered outdoor learning spaces for physical education as well as athletic fields would have to be examined in the planning.

## SUMMARY

- » The Meek site contains many desirable characteristics including currently being PPS owned property, within an established neighborhood, available for construction per schedule and one of the least cost options considered to date. However, Meek is located outside the existing Tubman catchment area. The district is unable to predict future enrollment changes if Tubman is to be relocated outside the existing catchment area. Additionally whole school busing raises operational and neighborhood concerns.

## RECOMMENDED NEXT STEPS

- » Considering the impacts of relocating Tubman outside the existing catchment area (including busing and school boundary considerations) staff recommends pausing further analysis of the Meek site.

# JEFFERSON HIGH SCHOOL (MAIN LOT)

**ADDRESS**

5210 N KERBY AVE

**CONSTRUCTION DATE**

1909 (PRIMARY)

**CURRENT OWNER**

PORTLAND PUBLIC SCHOOLS

**LEVELS**

4

**BLDG AREA**

318,790 SF

**SITE AREA**

14.02 ACRES

**CLASSROOMS COUNT**

74

**FUNCTIONAL CAPACITY**

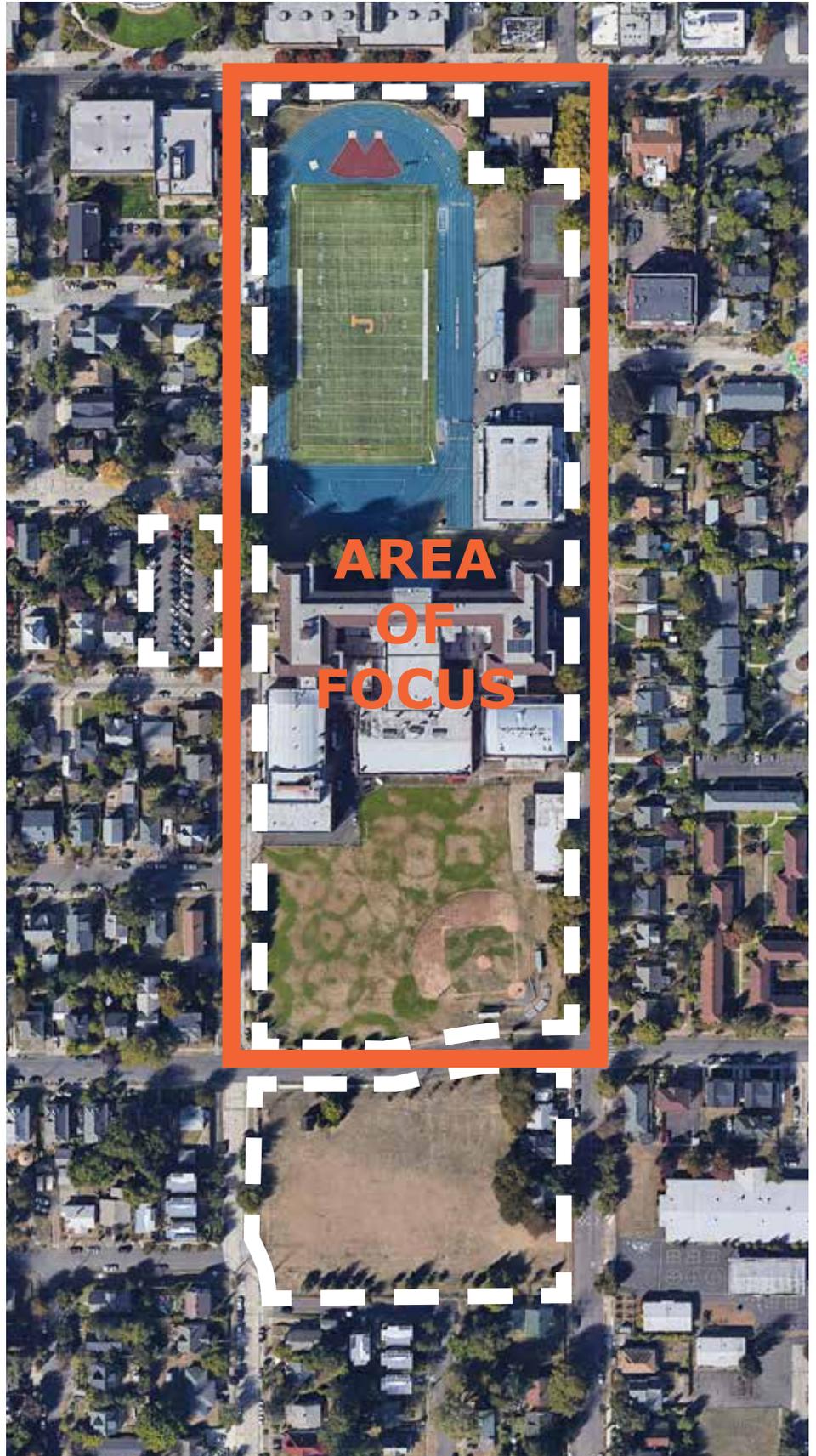
1,817 STUDENTS

**2021-22 ENROLLMENT**

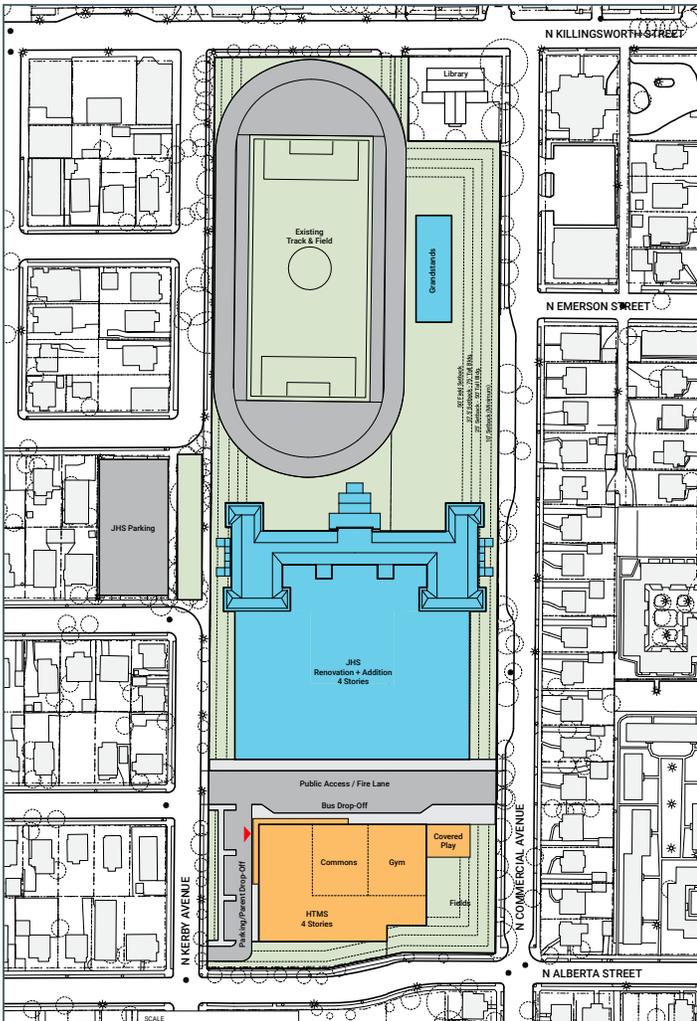
588

**ZONING**

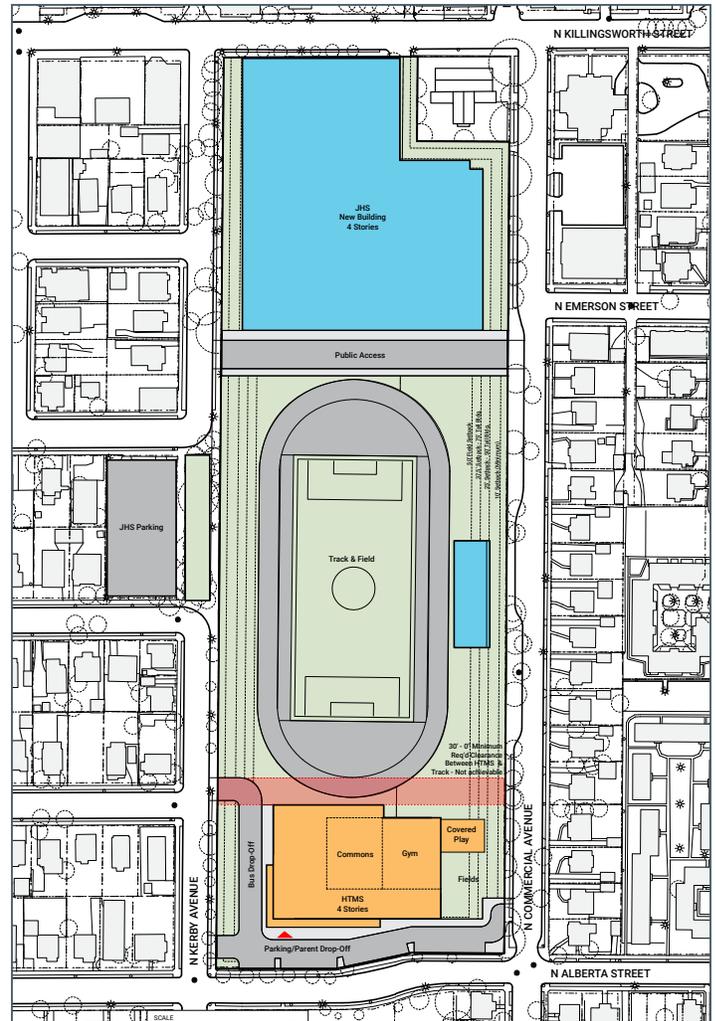
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## JEFFERSON HIGH SCHOOL (MAIN LOT)



**JHS MAIN LOT PLAN DIAGRAM - RENOVATE**



**JHS MAIN LOT PLAN DIAGRAM - REBUILD NEW**

Images by: Bora Architecture & Interiors

### COMMUNITY CONSIDERATIONS

- » Community concern has been expressed around the co-location of middle and high school students as well as the material reduction in outdoor space for both schools
- » Tubman staff have expressed concern about the lack of outdoor amenities for students at the current location. Co-locating Tubman at Jefferson would result in a reduction in outdoor space and amenities.

### LOCATION

- » Jefferson High School is located in the northwest quadrant of the Harriet Tubman catchment area.

### SITE SUITABILITY

- » The most significant site constraint is the size of the Jefferson main lot at 11 acres. 11 acres is too small to site all the necessary elements for a comprehensive high school, adding a comprehensive middle school to the site would exacerbate the site constraints.

- » Co-locating Tubman on this site would materially limit outdoor play and athletic space for both schools as well as parking, circulation and bus access.
- » Further the site is considered a “super block” by the City of Portland and development will require new bike and pedestrian access further breaking up the site.
- » With both schools sited at this location, all outdoor space (possibly including the track depending on the final layout) except the football field and covered play area will be lost. Please see plan diagrams above for sample site layouts..

**DEVELOPMENT AVAILABILITY (TIME)**

- » If Jefferson and Tubman are to be co-located on the same parcel, considerable planning will need to take place to carefully stage and phase the work.
- » The [Jefferson High School Conceptual Master Plan](#) assumed Jefferson students and staff would use vacant parcel south of N Alberta St during construction as temporary classroom space, as well as portions of the existing school (such as the theater and commons) until new structures are in place.
- » The southern part of the main parcel would be needed for construction staging area. If this assumption holds for a co-location with Tubman, it is likely that construction would not be able to begin on Tubman until 2026 or later, requiring students to remain at a temporary location for 2 or more years.

**OPERATIONAL SUSTAINABILITY**

- » Locating Harriet Tubman middle school on this site utilizes existing district property. Construction of a new middle school at this site would require all new construction.

**COST CONSIDERATIONS**

**Conceptual Cost Estimate Ranges: \$139M to \$164M**

- » Base cost estimates assumptions are outlined in the COST ESTIMATES section. Unique site cost considerations include:
- » **LAND** - Because the District already owns the property, there are some anticipated savings to be realized as opposed to having to purchase land. (- \$)
- » Alternative athletic venue(s) would need to be located and potentially leased due to the relatively small land area. (+ \$)

	JEFFERSON COST ESTIMATE RANGE		
	%	LOW	HIGH
LAND		NA	NA
HARD COSTS		\$59,446,450	\$70,596,750
SOFT COSTS	15%	\$8,916,968	\$10,589,513
FFE	10%	\$6,836,342	\$8,118,626
SITE DEVELOPMENT	12%	\$9,023,971	\$10,716,587
SWING SITE	5%	\$4,211,187	\$5,001,074
ADMINISTRATION	4%	\$3,537,397	\$4,200,902
CONTINGENCY	15%	\$13,795,847	\$16,383,518
ESCALATION	VARIES	\$32,883,270	\$38,602,099
TOTAL		\$138,651,430	\$164,209,068
<b>ROUNDED TOTAL</b>		<b>\$139,000,000</b>	<b>\$164,000,000</b>

JEFFERSON HS CONCEPT SCHEDULE	2022	2023	2024	2025	2026	2027	2028
Site Selection	█						
Property Negotiations							
Property Due Diligence		█					
<b>Relocate Existing Programs</b>							
Procurement			█				
<b>Master Planning</b>			█	█			
<b>Design</b>				█	█	█	
<b>Construction</b>						█	█
<b>Swing Site</b>						█	█
Tubman MS Opens							█

## ACADEMIC SUITABILITY

- » The co-location of two noncontiguous buildings on the Jefferson main site can be accommodated on the site only at the expense of athletic educational specifications for the high school. This would impact the practice fields as well as the baseball and softball fields, and tennis courts. The outdoor play area for the middle school would be severely limited, making outdoor gatherings, recess, etc. challenging.

## RECOMMENDED NEXT STEPS

- » Given the significant physical constraints and educational concerns of colocation, staff does not recommend considering this option further.

## FURTHER CONSIDERATIONS

- » Jefferson is currently in the process of being master planned for modernization with construction slated to begin in 2024. Incorporating the Harriet Tubman Middle School relocation into the project would require beginning an entirely new project and would put the reopening date of 2028 at risk. Additional costs would be associated with any material project delay.
- » Currently Jefferson students are expected to remain on site during construction (in much the same manner as Lincoln) however, co-locating would require displacement of students from both schools to swing sites for the duration of the project. Further, the density of the site creates problems with vehicular and pedestrian access and parking.

## SUMMARY

- » Siting Tubman on the Jefferson HS site has the benefit of locating the school within the existing Tubman catchment area and land currently owned by PPS. However co-locating two schools on such a small site would create material negative impacts for both schools and overburden the constrained site.

# JEFFERSON HIGH SCHOOL (SOUTH LOT)

**ADDRESS**

5210 N KERBY AVE

**CONSTRUCTION DATE**

1909 (PRIMARY)

**CURRENT OWNER**

PORTLAND PUBLIC SCHOOLS

**LEVELS**

4

**BLDG AREA**

318,790 SF

**SITE AREA**

14.02 ACRES

**CLASSROOMS COUNT**

74

**FUNCTIONAL CAPACITY**

1,817 STUDENTS

**2021-22 ENROLLMENT**

588

**ZONING**

IR INSTITUTIONAL RESIDENTIAL LCU



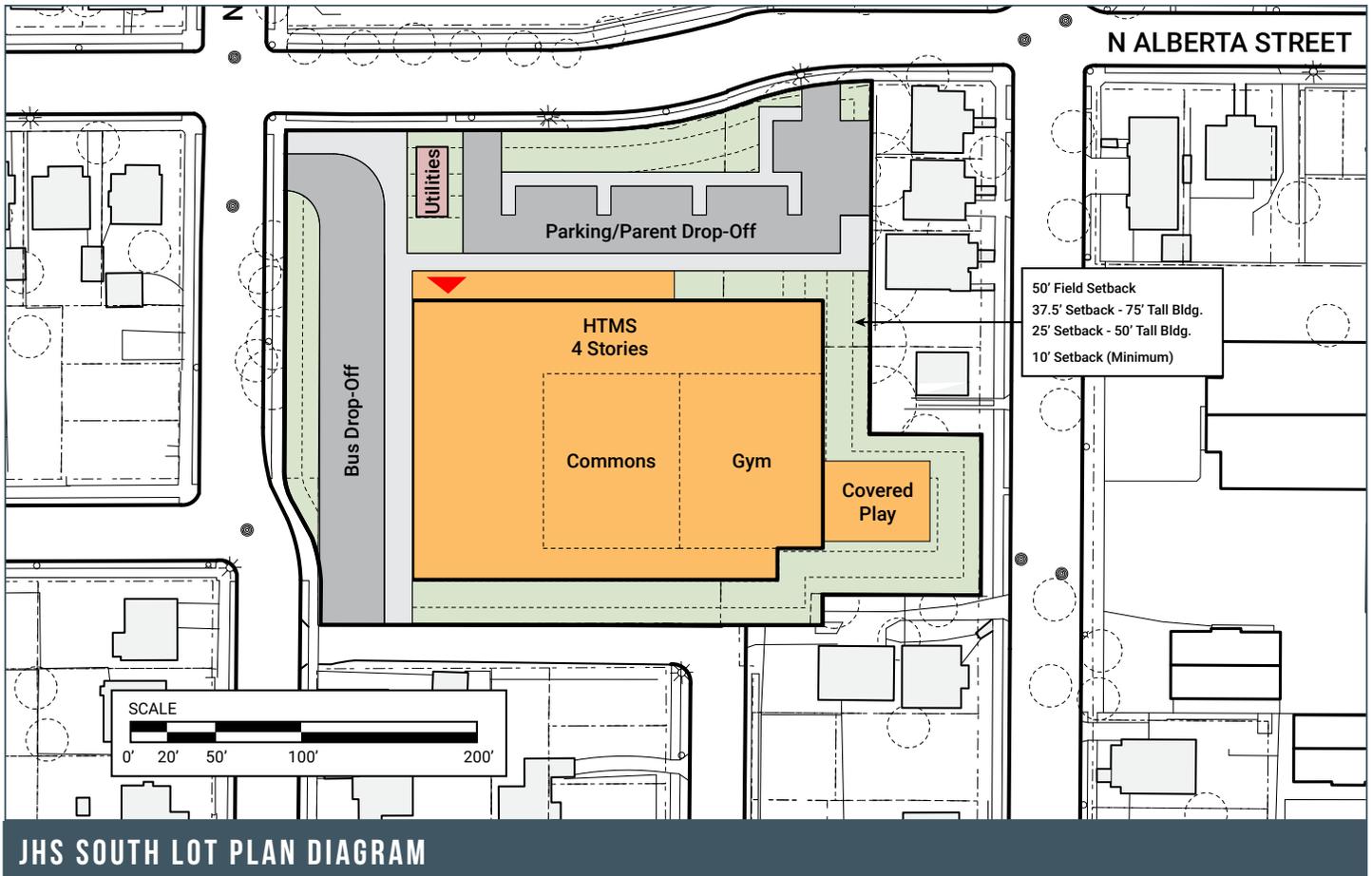


Image by: Bora Architecture & Interiors

## COMMUNITY CONSIDERATIONS

- » Tubman staff have expressed concern about the lack of outdoor amenities for students at the current location. Locating Tubman at Jefferson would likely realize a reduction in outdoor space and amenities.
- » Additional community input will be received in ongoing engagement sessions.

would move Jefferson to a 6-12 school model or co-locating Tubman MS and Jefferson HS in a combined facility, this study focused on the existing vacant parcel south of N Alberta St. The site analysis of Jefferson HS's main campus was included in Due Diligence Vol.1 and is included in Appendix A. The Jefferson High School modernization conceptual site analysis is available [here](#) for reference.

## LOCATION

- » Jefferson High School is located in the northwest quadrant of the Harriet Tubman catchment area.
- » The Jefferson High School modernization comprehensive master planning is currently underway. Due to the District not currently considering programmatic changes which

## SITE SUITABILITY

- » The vacant parcel south of Alberta is just over two acres; well below the target acreage of 6-9 acres for a comprehensive middle school and smaller than the smallest current middle school site - Tubman (3.1 acres) - and lacks an abutting usable park. Kellogg, by contrast, is 5.8 acres.
- » Utilizing this parcel for a middle school would

alter Jefferson HS comprehensive master planning and would introduce a variety of challenges for both Jefferson and Tubman. The vacant parcel is envisioned as a softball field and parking lot in the Jefferson HS conceptual master plan. The final site plan for Jefferson HS will be determined via the ongoing comprehensive master planning process.

property, there are some anticipated savings to be realized as opposed to having to purchase land. (- \$)

- » Alternative athletic venue(s) would need to be located and potentially leased due to the relatively small land area. (+ \$)

## DEVELOPMENT AVAILABILITY (TIME)

- » The southern vacant parcel of Jefferson is expected to be utilized as swing space to temporarily house Jefferson students during construction and will be unavailable for development until 2026. Beginning construction in 2026 would push the Tubman reopening date to 2028 and require Tubman students to be housed at a temporary location for 2 years. Tubman planning and design would be scheduled to align with the beginning of construction.
- » Further, there is a sewer line running through the property that would need to be relocated and a pressurized natural gas (above ground) facility that would also need to be relocated. There is no estimate on time required to negotiate these changes with the utilities or cost associated with the relocations.

## OPERATIONAL SUSTAINABILITY

- » Locating Harriet Tubman middle school on this site utilizes existing district property. Construction of a new middle school at this site would require all new construction.

## COST CONSIDERATIONS

### Conceptual Cost Estimate Ranges: \$139M to \$164M

- » Base cost estimates assumptions are outlined in the COST ESTIMATES section. Unique site cost considerations include:
- » **LAND** - Because the District already owns the

	JEFFERSON COST ESTIMATE RANGE		
	%	LOW	HIGH
LAND		NA	NA
HARD COSTS		\$59,446,450	\$70,596,750
SOFT COSTS	15%	\$8,916,968	\$10,589,513
FFE	10%	\$6,836,342	\$8,118,626
SITE DEVELOPMENT	12%	\$9,023,971	\$10,716,587
SWING SITE	5%	\$4,211,187	\$5,001,074
ADMINISTRATION	4%	\$3,537,397	\$4,200,902
CONTINGENCY	15%	\$13,795,847	\$16,383,518
ESCALATION	VARIES	\$32,883,270	\$38,602,099
TOTAL		\$138,651,430	\$164,209,068
<b>ROUNDED TOTAL</b>		<b>\$139,000,000</b>	<b>\$164,000,000</b>

## ACADEMIC SUITABILITY

- » Due to the limited size of the site, this option does not provide the ability to construct a school to meet all middle school education specification requirements.
- » If this site were to be used, exterior athletic fields and play areas would have to be shared with Jefferson and would be located across Alberta Street. Use of this site also impedes the ability to meet the high school educational specifications for athletics

## FURTHER CONSIDERATIONS

- » The District is not considering a programmatic change to a 6-12 school model or co-locating Tubman MS and Jefferson HS in a combined facility. Therefore, only the southern parcel at the Jefferson site has been included in the analysis.
- » PPS continues to investigate a utility easement and related facilities located on the site.

## SUMMARY

- » The Jefferson HS southern parcel has the benefit of being located within the existing Tubman catchment area and land currently owned by PPS. However the site has considerable challenges including being too small to site a comprehensive middle school.

## RECOMMENDED NEXT STEPS

- » Due to the size of the parcel, staff recommends pausing further analysis of the Jefferson southern parcel.

JEFFERSON HS CONCEPT SCHEDULE	2022	2023	2024	2025	2026	2027	2028
Site Selection							
Property Negotiations							
Property Due Diligence							
<b>Relocate Existing Programs</b>							
Procurement							
<b>Master Planning</b>							
<b>Design</b>							
<b>Construction</b>							
<b>Swing Site</b>							
Tubman MS Opens							

\*Schedule Risk: The Southern parcel will be utilized as a swing site until 2026

# HUMBOLDT ELEMENTARY

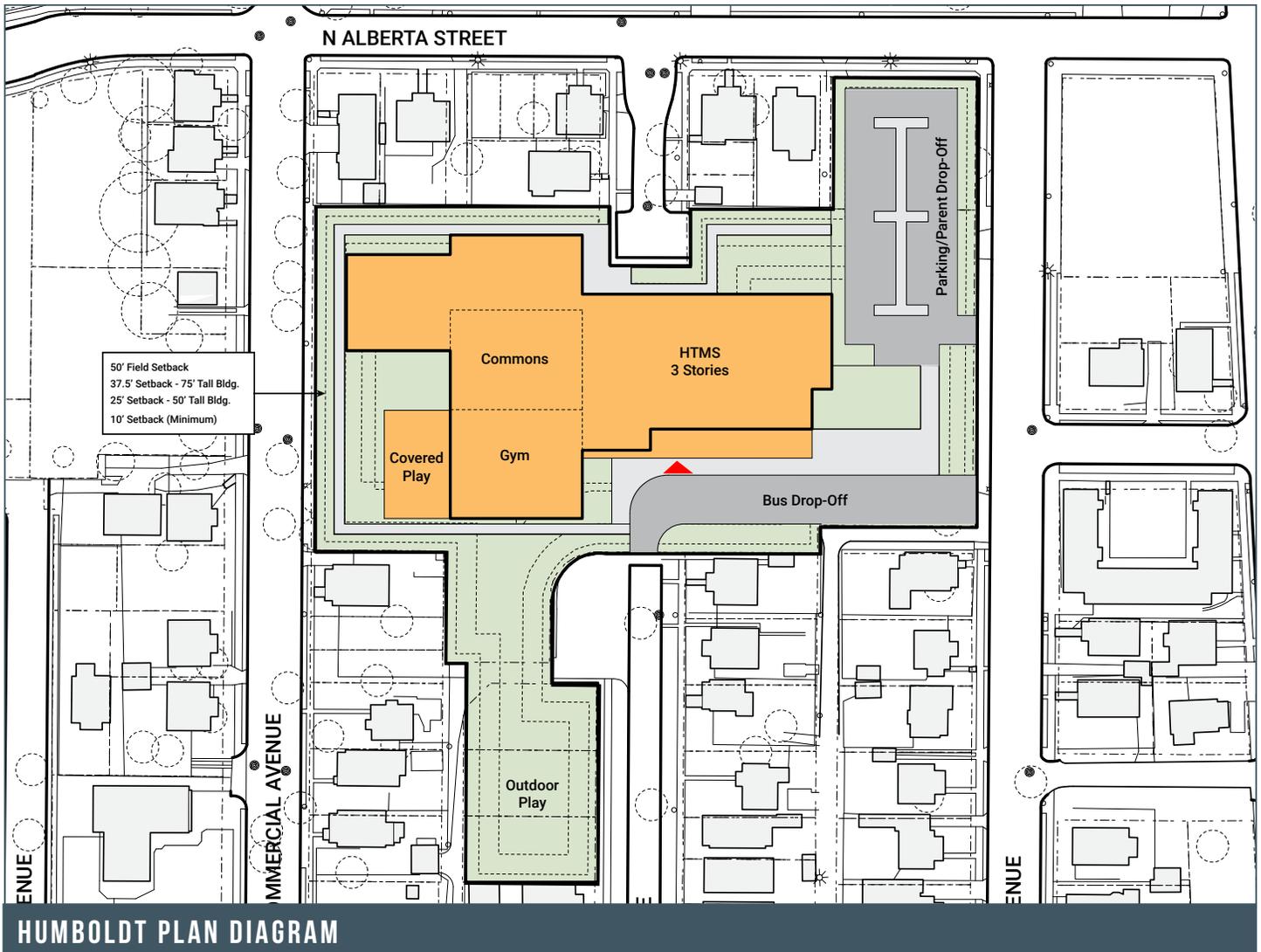
ADDRESS  
4039 NE ALBERTA CT

SITE AREA  
2.98 ACRES

ZONING  
RM2 RESIDENTIAL MULTI-DWELLING  
R2.5 RESIDENTIAL 2500



## HUMBOLDT ELEMENTARY



**HUMBOLDT PLAN DIAGRAM**

Image by: Bora Architecture & Interiors

### LOCATION

- » Humboldt is located within the HTMS catchment area and is adjacent to Jefferson High School. It is currently under a long term lease agreement with Kairos, a PPS charter school.

middle school with some limited site amenities, however the site is oddly configured and use of the vacant parcel connect to Jefferson HS - south of N Alberta St - may be necessary for site amenities such as parking and athletic space. The combination of these two parcels is approximately 5 acres.

### SITE SUITABILITY

- » The site is 2.98 acres; about the same size as the existing Tubman property but without the benefit of an adjacent usable park and well below the target acreage of 6-9 acres for a comprehensive middle school. It is also oddly shaped.
- » Zoning: the site is split zoned and conceptually has enough area to site a 3 story comprehensive

### DEVELOPMENT AVAILABILITY (TIME)

- » The site is currently not available due to the long term lease with KairosPDX, a PPS charter school.

### OPERATIONAL SUSTAINABILITY

- » PPS owns the current Humboldt property but has

a current long-term lease with KairosPDX, a PPS charter school.

school programming and a target enrollment of 675 students and there is space to provide outdoor amenities including play areas during recess, open space for physical education and sports. This option assumes sharing outdoor space with Jefferson High School on the parcel south of N Alberta St and across Alberta from the main school building. It is anticipated these shared spaces would be planned so students would not need to cross Commercial Ave. during recess..

### COST CONSIDERATIONS

#### Conceptual Cost Estimate Ranges: \$140M to \$166M

Base cost estimates assumptions are outlined in the COST ESTIMATES section. Unique site cost considerations include:

- » **LAND** - TThe District already owns the property, no land purchase costs are estimated. (- \$)
- » Costs associated to compensate Kairos for the long-term lease are not included.

	HUMBOLDT COST ESTIMATE RANGE		
	%	LOW	HIGH
LAND		NA	NA
HARD COSTS		\$60,468,442	\$71,638,586
SOFT COSTS	15%	\$9,070,266	\$10,745,788
FFE	10%	\$6,953,871	\$8,238,437
SITE DEVELOPMENT	12%	\$9,179,109	\$10,874,737
SWING SITE	5%	\$3,824,629	\$4,531,141
ADMINISTRATION	4%	\$3,579,853	\$4,241,148
CONTINGENCY	15%	\$13,961,425	\$16,540,476
ESCALATION	VARIES	\$33,308,504	\$38,998,155
TOTAL		\$140,346,099	\$165,808,468
<b>ROUNDED TOTAL</b>		<b>\$140,000,000</b>	<b>\$166,000,000</b>

### FURTHER CONSIDERATIONS

- » Consideration should be given to the overall plan of the Jefferson modernization and flexibility of the outdoor space and impact an adjacent middle school would have.

### SUMMARY

- » The Humboldt site has many beneficial characteristics including being owned by PPS and within the existing Tubman catchment area. However the site is not available for development due to the existing long-term lease.

### ACADEMIC SUITABILITY

- » This option allows the ability to construct a school to meet all middle school education specification requirements. Interior spaces can support middle

### RECOMMENDED NEXT STEPS

- » Due to the existing lease Staff recommends pausing additional analysis of this site.

HUMBOLDT CONCEPT SCHEDULE	2022	2023	2024	2025	2026	2027
Site Selection						
Property Negotiations						
Property Due Diligence						
Relocate Existing Programs						
Procurement						
Master Planning						
Design						
Construction						
Swing Site						
Tubman MS Opens						

# APPENDIX A

## CONTENTS

- » Co-location Options
- » I-5 Impact Summary
- » Environmental Review Process
- » Funding
- » Enrollment Forecasts
- » Additional Opportunity Sites
- » Sites No Longer Under Consideration

# CO-LOCATION OPTIONS

## BACKGROUND

In 2016, the district launched a multi-year process to shift from a K-8 configuration to middle school and K-5 configurations. The shift intended to expand instructional programming options for students in grades 6-8. Eighteen of the twenty-nine total K-8s have been converted as of this writing — mostly to K-5s.

Three former K-8 schools were (or will soon be) converted to middle schools, including Harrison Park (planned, fall 2023), Ockley Green, and Roseway Heights. While the future status of the 11 remaining K-8 schools is yet to be determined, most will likely become elementary schools.

Older K-8 facilities are often poorly-suited for effective middle school instruction. They typically lack the specialized STEAM, performing arts, athletic, and elective spaces required to support the needs and interests of middle-grade students.

## BOUTIQUE MODELS

Faubion is a counterpoint to older K-8 buildings. Conceived and designed as a K-8, the building successfully supports the full range of grade levels, including dedicated STEAM, performing arts, and elective spaces for middle school students.

If Harriet Tubman Middle School were to be co-located at a PPS site within the Tubman catchment area (in a single school Faubion model), state funding could support a modernization that includes specific and intentional spaces for middle school instruction.

Space challenges would remain, however. Co-locating Harriet Tubman Middle School would be challenging, but not impossible if approached intentionally and with guidance from the community.

## CO-LOCATION SITES

After introductory spatial and zoning analysis of the Boise-Eliot, Irvinton, Martin Luther King, and Sabin school campuses, none of the sites are considered viable co-location options due to a variety of factors including lack of available building square footage (including floor-to-area ratio maximums).

As part of this Volume 4 analysis, Staff has considered co-location with Jefferson which is further discussed earlier in this document

# I-5 IMPACT SUMMARY

This summary is based on the latest information available. The I-5 Rose Quarter Improvement Project is in the design phase. Precise schedule details are not yet available and subject to change.

## 2023-24 SCHOOL YEAR

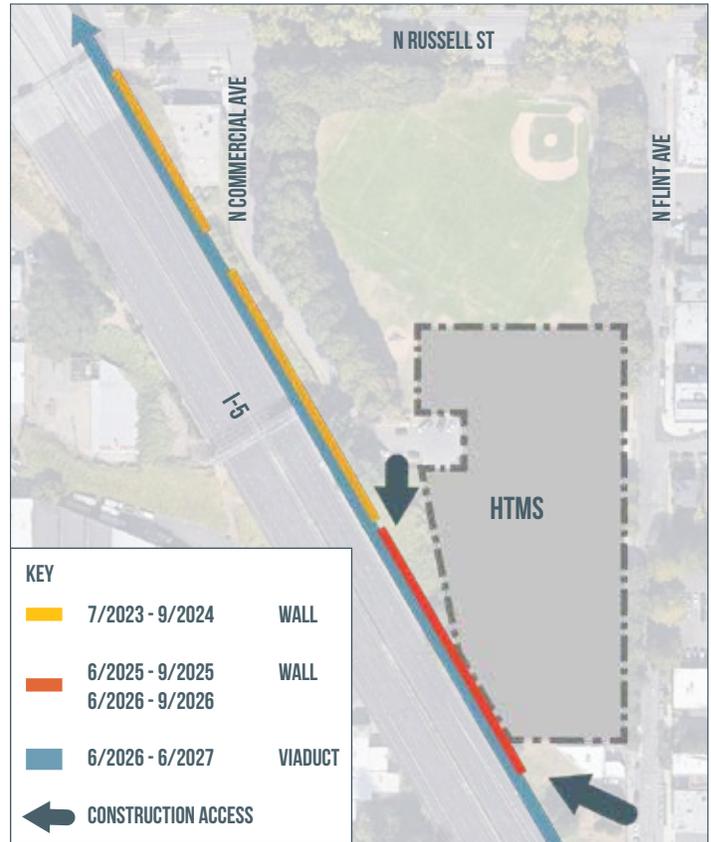
Monday-Friday daytime hours. Work will occur during the school year, starting in early 2024, off of PPS property but close to Tubman. Start to build walls from Russell St and south, to the area west of the gymnasium. Impacts include construction access utilizing Commercial Ave.

## 2024 SUMMER

Monday-Friday daytime hours. Potential relocation of underground utilities where the new retaining wall is going, west of Tubman. ODOT may need to access the back part of the Tubman property for this work during Summer 2024. This is in the preliminary stage of investigation and not yet confirmed to be necessary. If there are utilities requiring relocation, these utilities would be serving our buildings, so we would expect interruptions of service. Continue work on walls from Russell St to the area west of the gymnasium. Commercial Ave used for ODOT access. Does not require Tubman property staging or access.

## 2025 SUMMER ONLY

24/7 schedule planned. Using the back side of Tubman for staging and work. ODOT will create their access on ODOT Right Of Way (Tillamook Ave to PPS property line) and will also use access from Commercial Ave. Staging of equipment and ODOT access will take up the north, south and west sides of school. Remove fencing and pavement. Shaft drilling to create



retaining wall, west of the main school building. Continue work on walls from Russell St south, as well as the noise wall that goes on top of the new retaining wall. Temporary paving and fencing will be restored before the start of the school year.

## 2026 SUMMER ONLY

24/7 schedule possible. Using the back side of Tubman for staging and work. Remove temporary paving and fencing. Finish building the retaining wall. Complete building of the noise wall on top of the retaining wall. Paving and fencing will be restored before the start of the school year

## 2026-27 SCHOOL YEAR

Monday-Friday daytime hours. Construction of the fascia for retaining wall. Construction of the Eliot Viaduct, the area at current freeway level that is west of the Tubman property. Impacts include construction access utilizing Commercial Ave.

## ELIOT VIADUCT

ODOT has informed the district that they have concluded Harriet Tubman staff, students, and district operations will not be harmed by impacts of Eliot Viaduct construction when school is in session. This conclusion does not align with the district's assessment of impacts. District staff have requested specific technical details from ODOT that validate these statements, including current measurements, estimated peak measurements during construction, and anticipated measurements at the time of construction completion for:

- » air quality
- » noise
- » dust/airborne pollution
- » vibration
- » traffic flow and congestion during dropoff and pickup
- » access and circulation impacts for staff, students, families and school buses
- » equipment and construction activity impacts including cranes and swing radius
- » the construction impact upon air filtration equipment that was procured and installed during HTMS' 2017/18 HVAC upgrades

ODOT's responses to information requests have been mixed at best and largely evasive. Specific data on forecasted noise or air measurements (for example) remain unanswered. ODOT has not provided sufficient information to conclude construction of the Eliot Viaduct will not have material negative impacts to staff and students. Therefore the district continues to assert that the impact of Eliot Viaduct construction during school hours will be material and consequential, and has the potential to bring harm to staff and students occupying the site.

# ENVIRONMENTAL REVIEW PROCESS

To date, only cursory outdoor air sampling for particulate matter has been conducted at the BESC and PBOT sites. The cursory sampling ruled out any elevated particulate matter at the time of the sampling only. Any site selected for further analysis would be subject to an EPA-defined Phase I and Phase II Environmental Site Assessment.

A Phase I Environmental Site Assessment will research, catalog, and analyze:

- » Current and historical ownership and activities on the property
- » Existing environmental information related to the property, such as the past or current presence of underground storage tanks, utility lines, etc.
- » Influences from surrounding properties

A Phase II Environmental Site Assessment, when determined to be needed, will include:

- » Environmental sampling (air, soil, water)
- » Geotechnical surveys

# FUNDING

During the 2022 Legislative Session the legislature approved \$120 million in general funds for the District to relocate Harriet Tubman Middle School.

If the funding provided by the State is insufficient to cover the cost of relocation, the District will need to identify other capital funding sources to complete the relocation.

# ENROLLMENT FORECASTS

Enrollment forecasts are used, in part, to determine whether the district will need to add or modify facility space to meet school program or configuration needs. Student enrollment forecasts, combined with building capacity and utilization, provide a framework for facility needs to serve Portland Public Schools' graduate portrait.

The enrollment forecasts presented below were prepared by the Portland State University Population Research Center for Portland Public Schools. These data are based on recent enrollment numbers (October 2020 and

October 2021) and forecast through 2037 for K-5 and Middle School configurations, and the overall district. These data are preliminary; final forecasts are expected for individual schools by March of this year and will forecast enrollment to 2032.

The preliminary 15-year enrollment forecast integrates district enrollment trends with local area population, enrollment, and housing trends. This information is intended to be used as a school planning tool and a basis for community discussions about future school facility needs.

## ENROLLMENT CHANGE 2021-22 THROUGH 2036-37 SUMMARY

CONFIGURATION	2021-22 ENROLLMENT (ACTUAL)	2036-37 (PRELIMINARY FORECASTS)	CHANGE	
K-5	20,324	19,094	1,230	-6%
6-8	10,345	8,603	1,742	-17%
K-12	45,005	39,409	5,596	-12%

## PRELIMINARY ENROLLMENT FORECASTS PROVIDED BY PSU POPULATION RESEARCH CENTER, JANUARY 2022

NAME	PROGRAM	2019-20 (ACTUAL)		2020-21 (ACTUAL)		2021-22 (ACTUAL)		2022-23 (PRELIMINARY FORECAST)	
		ENROLLMENT	UTILIZATION	ENROLLMENT	UTILIZATION	ENROLLMENT	UTILIZATION	ENROLLMENT	UTILIZATION
BOISE-ELIOT	NEIGHBORHOOD	325	50%	327	50%	321	49%	325	50%
IRVINGTON	NEIGHBORHOOD	325	59%	320	58%	248	45%	242	44%
MLK JR	MANDARIN	166	-	181	-	169	-	167	-
	NEIGHBORHOOD	155	-	138	-	128	-	146	-
	TOTAL	321	51%	319	50%	297	47%	313	49%
SABIN	NEIGHBORHOOD	418	69%	360	59%	340	56%	340	56%
HARRIET TUBMAN	MANDARIN	13	-	26	-	35	-	34	-
	NEIGHBORHOOD	417	-	417	-	353	-	340	-
	TOTAL	430	59%	443	61%	388	53%	374	51%
JEFFERSON	NEIGHBORHOOD	641	35%	620	34%	588	32%	607	33%

The nature of forecasting requires some level of speculation, so questions around data integrity are warranted; however, previous forecasts offer a way to validate predictions because of the methodological consistency used by the Population Research Center. When measuring the deviation between forecasted and actual enrollment, estimates from 2010 through the end of 2019 (pre-pandemic) had an error rate of less than 2%, often below 1%.

Primary data sources used to prepare these forecasts include historic enrollments through 2021-22, U.S. Census Bureau 2000 and 2010 Decennial Censuses and 2015 to 2019 American Community Survey, birth data from the Oregon Center for Health Statistics, and housing development information from the City of Portland and Metro.

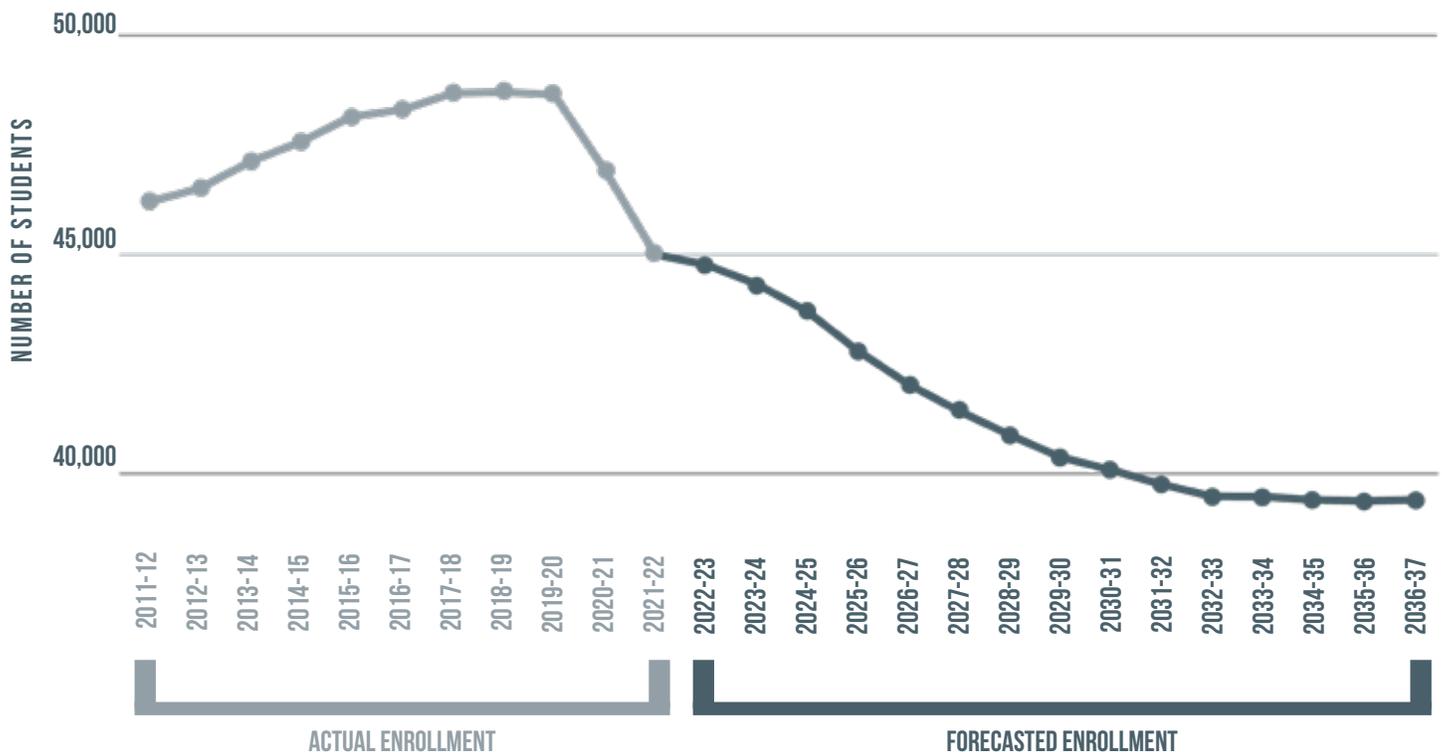
## DISTRICT ENROLLMENT FORECAST

The COVID-19 pandemic significantly shifted enrollment for the 2020-2021 school year. The lasting impact of the pandemic on enrollment remains to be seen but the enrollment decrease for the 2021-2022 school year was commensurate with the decrease from the previous year, suggesting the pandemic will have a durable effect on enrollment.

In fall 2021, the district enrolled 45,005 students in grades K-12, a decrease of 1,932 students from fall 2020. For comparison, the pandemic-related enrollment decline seen in fall 2020 was 1,716.

The most significant decline in the past two years was seen in the lower grades. From 2019-2020 to 2020-2021

### PRELIMINARY DISTRICT ENROLLMENT FORECASTS



K-2 enrollment declined eight percent. From 2020-2021 to 2021-2022 the enrollment decline was similar at six percent. Demographers with the Portland State University Population Research Center anticipate that enrollment will continue to decline, albeit not as sharply, through the forecast range. In addition to the pandemic, declining birth rates and slower net migration to the Portland region play a significant part in the enrollment decline.

Overall district enrollment is projected to fall throughout the forecast range. By the end of the 15-year forecast in 2036-37, projected enrollment is 39,409 – more than 9000 students below its pre-pandemic 2019-20 level.

### PRELIMINARY CONFIGURATION ENROLLMENT FORECASTS



# ADDITIONAL OPPORTUNITY SITES

If any of the additional opportunity sites that follow are considered viable by the Board, district staff can provide deeper analysis similar to what has been provided for the above locations.

# LLOYD CENTER

**ADDRESS**

2201 NE LLOYD CENTER

**CURRENT OWNER**

LLOYD CENTER LLC

**SITE AREA**

24.25 ACRES

**ZONING**

CX - CENTRAL COMMERCIAL



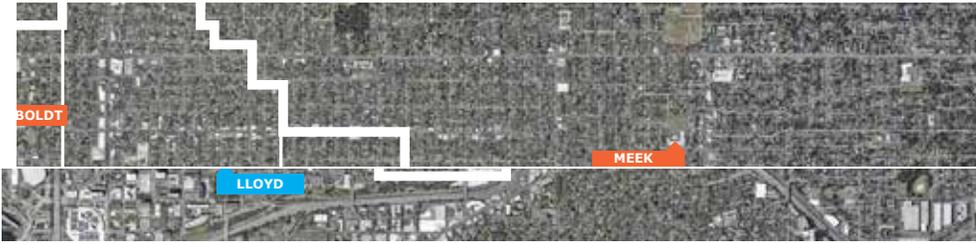


FIGURE 01 SITE AREA ANALYSIS



FIGURE 02 KELLOGG MS FOOTPRINT ON LLOYD SITE

## COMMUNITY CONSIDERATIONS

- » Outside catchment area, but has potential to encourage commuting for families
- » May bring other students in due to its location and ability to commute
- » Also in close proximity to a freeway
- » In a commercial area, which presents trade offs with residential area options
- » Additional community input will be received in ongoing engagement sessions.

## LOCATION

- » The Lloyd Center sits two blocks south of the existing Harriet Tubman catchment boundary.

## SITE SUITABILITY

- » Lloyd Center is over 24 acres. All or part of the Lloyd Center parcel would be sufficient to support middle school programming.
- » The site is embedded within a predominantly commercial zone, reflecting the heritage of the shopping center. The pedestrian network surrounding the site is typical for Portland’s urban core. The area to the south is severed by I-84. To the north, NE Weidler and SE Broadway offer access to commercial activity but also interrupt access to the Irvington neighborhood.
- » Zoning: the Lloyd Center site is zoned Central Commercial (CX); schools are allowed outright

on the site. No conditional use process would be necessary.

- » Figure 02 overlays Kellogg Middle School on the Lloyd Center site.. The solid orange shape is the Kellogg site and the lighter orange outline is the building. While not a true test-fit, the overlay illustrates the approximate suitability for the site to support a three-story middle school.

## DEVELOPMENT AVAILABILITY (TIME)

- » Lloyd Center is currently under new management and long term master planning has begun. The desire on the part of the owners is to maintain office and retail at this location.
- » Utilizing part of the Lloyd site for Harriet Tubman middle school would require complex property negotiations likely to take months or years. Prolonged negotiations could require Tubman students to stay in a temporary location longer than 1 year. If property negotiations are ultimately unsuccessful, the Tubman relocation process will need to start over.

## OPERATIONAL SUSTAINABILITY

- » Locating HTMS at Lloyd Center would bring a new asset into the District’s portfolio and require either new construction..
- » Being located outside the existing catchment area will necessitate additional bussing for all of, or most of, the school population.

## LLOYD CENTER

- » Locating a school outside the existing catchment area necessitates consideration of realignment of school enrollment boundaries. School enrollment changes are lengthy, complex processes that require thoughtful analysis of all outcomes and robust stakeholder engagement. The district is unable to predict future enrollment changes if Tubman is to be relocated outside the existing catchment area. That said, Lloyd Center is close to the existing Tubman catchment area and overall impacts may be lesser compared to locations
- » The cost estimate assumes demolition of a portion of the existing buildings to make room for construction of a new school.
- » Costs to relocate Tubman MS to the Lloyd Center site will far exceed the \$120 million provided by the State.

## FURTHER CONSIDERATIONS

- » With a twenty year redevelopment plan, HTMS would be located in a significant construction area for many years.

## COST CONSIDERATIONS

### Conceptual Cost Estimate Ranges: \$205M to \$284M

- » Base cost estimates assumptions are outlined in the COST ESTIMATES section. Unique site cost considerations include:
  - » **LAND:** The District would need to purchase/lease a portion or all of the property. The site is considered desirable commercial real estate with highest and best uses of dense commercial development. The cost to purchase this property likely exceeds the high end of the initial cost estimate range. (+ \$)
  - » We assume the need to purchase approximately eight (8) acres of property in the cost estimate.
  - » **HARD COSTS:** The existing site is very large at 24 acres and is composed of a shopping mall, acres of asphalt parking, and parking structures. Significant demolition and site preparation will need to occur to prepare the site for renovation/construction of a new middle school. (+ \$)

## SUMMARY

- » The Lloyd Center site includes beneficial characteristics including being available for purchase and large enough to accommodate a comprehensive middle school. However development of this site carries many significant risks including the unknown probability of successful (and timely) property negotiations and potentially exorbitant costs. The site is not located in a residential area, and is located outside the existing Tubman catchment area; the proximity to the current catchment boundary likely reduces the concern over future boundary changes but will still require busing of the majority of the student population.

	LLOYD CENTER COST ESTIMATE RANGE		
	%	LOW	HIGH
LAND		\$40,000,000	\$80,000,000
HARD COSTS		\$65,278,825	\$76,542,375
SOFT COSTS	15%	\$9,791,824	\$11,481,356
FFE	10%	\$7,507,065	\$8,802,373
SITE DEVELOPMENT	12%	\$9,909,326	\$11,619,133
SWING SITE	5%	\$4,128,886	\$4,841,305
ADMINISTRATION	4%	\$3,864,637	\$4,531,462
CONTINGENCY	15%	\$15,072,084	\$17,672,701
ESCALATION	VARIES	\$49,604,910	\$68,799,766
TOTAL		\$205,157,556	\$284,290,470
<b>ROUNDED TOTAL</b>		<b>\$205,000,000</b>	<b>\$284,000,000</b>

## RECOMMENDED NEXT STEPS

- » Considering the material challenges and risks noted with development of this site, staff recommends pausing further analysis of the Lloyd Center site.

LLOYD CENTER CONCEPT SCHEDULE	2022	2023	2024	2025	2026	2027
Site Selection						
<b>Property Negotiations</b>						
Property Due Diligence						
Relocate Existing Programs						
Procurement						
Master Planning						
Design						
Construction						
Swing Site						
Tubman MS Opens						

# EMANUEL

**ADDRESS**  
122 N GRAHAM ST

**CURRENT OWNER**  
LEGACY HEALTH SYSTEM

**SITE AREA**  
4.01 ACRES

**ZONING**  
C12 CAMPUS INSTITUTIONAL (north)  
CM3 COMMERCIAL MIXED USE (south)



# EMANUEL



**EMANUEL PLAN DIAGRAM**

## COMMUNITY CONSIDERATIONS

- » Emanuel Medical Center is located in the Albina neighborhood and within the HTMS boundary. Considering the history of negative impact the growth of the hospital has had on the area, the HTMS project could be a welcome step in repairing their relationship with the Black community.

## LOCATION

- » The two parcels under consideration are to the north of the hospital within the Harriet Tubman Catchment

## SITE SUITABILITY

- » The subject site consists of 2 parcels separated by a public street (N Graham). The sites are approximately 4 acres in aggregate.
- » Dawns Park is located immediately to the north, across N Stanton St, and an established residential neighborhood resides east. Emmanuel Legacy hospital lies directly west (the current emergency room is one block away) and hospital parking and

an office building currently occupy the site. The proximity to a busy hospital has raised concerns about location appropriateness for some students. The current Tubman site is about 1/4-mile from the subject site; which would allow a familiarity to students and families.

- » Zoning: there is a mix of zoning across the two parcels - Commercial Mixed Use 3 (CM3) and Campus Institutional 2 (CI2) - schools are not allowed in CI2 zones and development would first require a successful zone change.

## DEVELOPMENT AVAILABILITY (TIME)

- » Legacy has indicated these parcels are not available at this time.

## OPERATIONAL SUSTAINABILITY

- » Locating Tubman at this site would bring a new asset into the District's portfolio and (presumably) require demolition of an existing office building followed by new construction.
- » Due to its proximity to the existing Tubman school, transportation would remain substantially similar

to current operation.

## COST CONSIDERATIONS

### Conceptual Cost Estimate Ranges: \$162M to \$207M.

- » Base cost estimates assumptions are outlined in the COST ESTIMATES section. Unique site cost considerations include
- » **LAND** - Costs of these parcels would include the land as well as the relocation of a significant amount of hospital support and doctors offices.
- » We assume the need to purchase approximately four (4) acres of property in the cost estimate.

## FURTHER CONSIDERATIONS

- » Siting a school on a property bifurcated by a highly traveled public right-of-way that conveys vehicles to the adjacent hospital creates notable design and safety concerns.

## SUMMARY

- » The subject site has the benefit of being located near the current Tubman location, however development would meet several challenges

including requiring a successful zone change, navigating safety and design questions, but more notably, the current property owner has indicated the parcels are not for sale.

## REQUIRED NEXT STEPS

- » Staff recommends pausing further analysis of the site.

	EMANUEL COST ESTIMATE RANGE		
	%	LOW	HIGH
LAND		\$20,000,000	\$40,000,000
HARD COSTS		\$60,988,103	\$72,168,338
SOFT COSTS	15%	\$9,148,215	\$10,825,251
FFE	10%	\$7,013,632	\$8,299,359
SITE DEVELOPMENT	12%	\$9,257,994	\$10,955,154
SWING SITE	5%	\$3,857,497	\$4,564,647
ADMINISTRATION	4%	\$3,610,618	\$4,272,510
CONTINGENCY	15%	\$14,081,409	\$16,662,789
ESCALATION	VARIES	\$33,610,034	\$39,299,686
TOTAL		\$161,567,502	\$207,047,732
<b>ROUNDED TOTAL</b>		<b>\$162,000,000</b>	<b>\$207,000,000</b>

KENTON

# KENTON

**ADDRESS**

7528 N FENWICK AVE

**CONSTRUCTION DATE**

1913 (PRIMARY)

**LEVELS**

3

**BLDG AREA**

66,599 SF

**SITE AREA**

3.96 ACRES

**CLASSROOM COUNT**

18

**ZONING**

RM2 - RESIDENTIAL MULTI-DWELLING 2

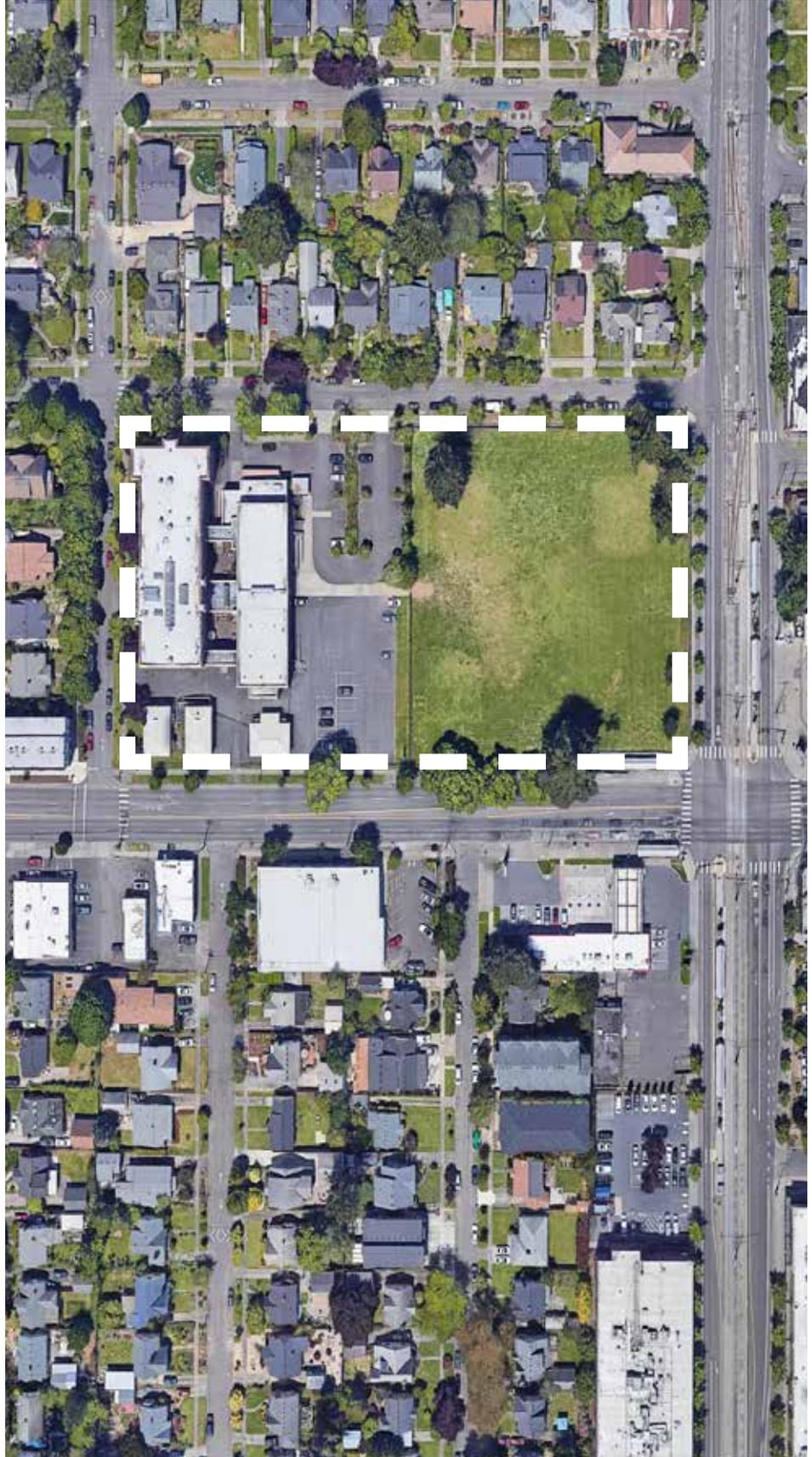




FIGURE 01 HARRIET TUBMAN CATCHMENT



FIGURE 02 KELLOGG MS FOOTPRINT ON KENTON SITE

**RACIAL EQUITY AND SOCIAL JUSTICE**

»

**COMMUNITY CONSIDERATIONS**

» Additional community input will be received in March and April.

**LOCATION**

» Kenton is located 1.6 miles north of the Harriet Tubman catchment area.

**SITE SUITABILITY**

- » At four acres, supporting middle school programming at Kenton would be challenging, especially for athletics.
- » The site is flanked to the south and east by high-traffic streets: N. Lombard and N. Interstate.
- » Zoning: The Kenton site is zoned RM2 - Residential Multi-Dwelling. Schools are not allowed by right on this site. A conditional use review would be necessary. Land area surrounding the site supports

a patchwork of uses, from residential to the north and south, and commercial to the east and west.

- » Figure 02 overlays Kellogg Middle School on the Kenton site. The solid orange shape is the Kellogg site and the lighter orange outline is the building. While not a true test-fit, the overlay illustrates the approximate suitability for the site to support a three-story middle school.

**DEVELOPMENT AVAILABILITY (TIME)**

- » The Alliance program currently uses the building. Once Alliance relocates to the Benson campus in 2024, Kenton will be available.

**OPERATIONAL SUSTAINABILITY**

- » Locating Harriet Tubman middle school on the Kenton site would realize some operational savings by utilizing an underutilized district asset. Kenton is undersized and would require additional square footage to house a middle school. The overall Facility Condition Index (FCI) - the ratio of a building’s maintenance costs relative to the cost of replacing the building at current construction costs - is .28 (or colloquially “poor”), suggesting renovation with a new addition is the likely

construction option.

## **COST CONSIDERATIONS**

- » Because the District already owns the property, there are some savings to be realized as opposed to having to purchase land. (- \$)
- » The existing building is in fairly good condition with exceptions like the mechanical, electrical, and plumbing systems. It has the potential to be well-suited to renovating and adding new on to the existing building. (- \$)
- » Alternative athletic venue(s) would need to be located and potentially leased due to the relatively small land area. (+ \$)
- » We believe this property to be in the low to middle of the cost range provided.

## **FURTHER CONSIDERATIONS**

- » Kenton is twenty thousand square feet smaller than the existing Harriet Tubman building. Significant capital investment would be necessary to align the building with middle school space requirements.

## **REQUIRED NEXT STEPS**

- » If considered viable by the Board, district staff will begin master planning efforts.

# 1380 NE MULTNOMAH

**ADDRESS**

1380 NE MULTNOMAH ST

**CURRENT OWNERS**

MULTIPLE

**SITE AREA**

6.51 ACRES

**ZONING**

CX - CENTRAL COMMERCIAL





FIGURE 01 HARRIET TUBMAN CATCHMENT



FIGURE 02 KELLOGG MS FOOTPRINT ON 1380 NE MULTNOMAH SITE

## RACIAL EQUITY AND SOCIAL JUSTICE

»

## COMMUNITY CONSIDERATIONS

- » Additional community input will be received in March and April.

## LOCATION

- » The NE Multnomah sits three blocks south of the existing Harriet Tubman catchment boundary.

## SITE SUITABILITY

- » By combining two adjacent parcels, the site would be 6.51 acres which is sufficient to support middle school programming. Individually, each parcel is unsized to support a middle school.
- » The site is embedded within a predominantly commercial zone, reflecting the heritage of the shopping center.
- » The pedestrian network surrounding the site is typical for Portland’s urban core. The area to the

south is severed by I-84. To the north, NE Weidler and SE Broadway offer access to commercial activity but also interrupt access to the Irvington neighborhood.

- » Zoning: the NE Multnomah site is zoned Central Commercial (CX); schools are allowed outright on the site. No conditional use process would be necessary.
- » Figure 02 overlays Kellogg Middle School on the NE Multnomah site. The solid orange shape is the Kellogg site and the lighter orange outline is the building. While not a true test-fit, the overlay illustrates the approximate suitability for the site to support a three-story middle school.

## DEVELOPMENT AVAILABILITY (TIME)

- » This study assumes two parcels would be purchased and consolidated. The western parcel is currently for sale and the developers of Lloyd Center have indicated they would be open to divesting of the adjacent movie theater parcel however, the location is zoned for high density and a number of development restrictions and agreements with Lloyd Center would need to be negotiated.

## OPERATIONAL SUSTAINABILITY

- » Locating HTMS at NE Multnomah would bring a new asset into the District's portfolio and require a new middle school be constructed.

## COST CONSIDERATIONS

- » 1. The District would need to purchase multiple parcels of land. The site is considered desirable commercial real estate with highest and best uses of dense commercial development. The cost to purchase this property likely exceeds the high end of the initial cost estimate range. (+ \$)
- » 2. The existing sites are a mix of asphalt parking lots, and the existing Regal Lloyd Theater bldg. Complex. Connecting the different areas to make a cohesive middle school campus seems to be a particular challenge and carries with it some cost risk. (+ \$)
- » We believe this property to be higher on the cost range provided.

## FURTHER CONSIDERATIONS

- » The parcel currently for sale (the western site) is 4.5 acres. Supporting a middle school on this land area would be challenging and could likely happen only at the expense of athletics programming. The initial cost being discussed by developers for this site is \$40M.

## REQUIRED NEXT STEPS

- » If considered viable by the Board, district staff will begin a dialogue with the owners regarding the site.

# WHITAKER-ADAMS

**ADDRESS**

5700 NE CESAR E CHAVEZ BLVD

**SITE AREA**

10.05 ACRES

**ZONING**

CM2 COMMERCIAL MIXED USE 2  
R5 RESIDENTIAL 5,000 CU





FIGURE 01 HARRIET TUBMAN CATCHMENT



FIGURE 02 KELLOGG MS FOOTPRINT ON WHITAKER-ADAMS SITE

## RACIAL EQUITY AND SOCIAL JUSTICE

»

## COMMUNITY CONSIDERATIONS

- » Additional community input will be received in March and April.

## LOCATION

- » Whitaker-Adams is outside the Harriet Tubman catchment area to the east.

## SITE SUITABILITY

- » With over 10 acres of land, Whitaker-Adams contains sufficient land area to support a middle school program. The site is bound to the south and east by high-traffic streets; the north and west edges of the site are contiguous with Fernhill Park and the Concordia neighborhood respectively.
- » Zoning: the bulk of the Whitaker-Adams site is zoned Residential 5,000 CU (R5). The eastern edge of the site that fronts NE 42nd Ave is zoned

Commercial Mixed Use2 (CM2). Schools are allowed outright in zone CM2. However, they are not allowed outright in R5. A conditional use review would be necessary.

- » Figure 02 overlays Kellogg Middle School on the Whitaker-Adams site. The solid orange shape is the Kellogg site and the lighter orange outline is the building. While not a true test-fit, the overlay illustrates the approximate suitability for the site to support a three-story middle school.

## DEVELOPMENT AVAILABILITY (TIME)

- » The district owns Whitaker-Adams and is immediately available for redevelopment.

## OPERATIONAL SUSTAINABILITY

- » Locating HTMS at the Whitaker-Adams site would require new construction of a school on vacant District property.

## COST CONSIDERATIONS

- » Because the District already owns the property,

there are some savings to be realized as opposed to having to purchase land. (- \$)

- » The site has already been cleared of buildings and is basically an open field ready for construction. (- \$)
- » We believe this property to be in the low to middle of the cost range provided.

## **FURTHER CONSIDERATIONS**

- » The district's Long-Range Facility Plan identifies Whitaker-Adams as one of three athletics hubs across the district. Together the three hubs support middle and high school athletics in regionally distinct, programmatically specific ways.
- » Additional consideration should be given to the proximity of this location to Ockley Green MS which is located in between the current Harriet Tubman site and Whitaker-Adams

## **REQUIRED NEXT STEPS**

- » If considered viable by the Board, district staff will begin master planning efforts.

## **SITES NO LONGER UNDER CONSIDERATION**

The following locations have been removed from consideration as they do not meet the basic criteria for a new building location

# ALBERTA PARK

**ADDRESS**

1905 NE KILLINGSWORTH ST

**CURRENT OWNER**

CITY OF PORTLAND

**SITE AREA**

16.70 ACRES

**ZONING**

OS - OPEN SPACE





HARRIET TUBMAN CATCHMENT

## LOCATION

- » Alberta Park is outside the existing Harriet Tubman catchment area. It sits northeast of the catchment boundary by approximately a mile.

## SITE SUITABILITY

- » With more than sixteen acres, Alberta Park contains more than sufficient land area to support a middle school. The park is directly north of Vernon K-8 and is flanked by residential neighborhoods to the east and west and commercial strips to the north and south.
- » The park is currently owned by the City of Portland, if negotiations proceed, athletic resources shared by the City and the district should be considered.
- » The site is not considered viable as the District does not support displacement of amenities supporting the historically Black neighborhoods nor does the site have sufficient land for a school.

## DEVELOPMENT AVAILABILITY (TIME)

- » Alberta Park is currently owned by the City of Portland. It is not available for purchase or development. It is documented here for discussion purposes only.

# BEAUMONT

**ADDRESS**

4043 NE FREMONT STREET

**CURRENT OWNER**

PORTLAND PUBLIC SCHOOLS

**SITE AREA**

5.72 ACRES

**ZONING**

R5 - RESIDENTIAL 5,000





HARRIET TUBMAN CATCHMENT

## LOCATION

- » Beaumont is located just outside of the Harriet Tubman catchment area 1.0 mile directly east along Fremont.

## SITE SUITABILITY

- » With over five acres, Beaumont could support middle school programming with careful site design and early consideration of athletics space requirements.
- » This site is not considered viable as it is outside of the catchment area currently occupied by students.

## DEVELOPMENT AVAILABILITY (TIME)

- » Beaumont is owned by the District.

# BEVERLY CLEARY

**ADDRESS**

3255 NE HANCOCK ST

**CURRENT OWNER**

PORTLAND PUBLIC SCHOOLS

**SITE AREA**

4.27 ACRES

**ZONING**

R5 - RESIDENTIAL 5,000





HARRIET TUBMAN CATCHMENT

## LOCATION

- » Beverly Cleary is located just outside of the Harriet Tubman catchment area 1.0 mile directly east along Fremont.

## SITE SUITABILITY

- » With just over four acres, Beverly Cleary might be able to support middle school programming with careful site design and early consideration of athletics space requirements. However, it may prove to be challenging.
- » This site is not considered viable as it is outside of the catchment area currently occupied by students.

## DEVELOPMENT AVAILABILITY (TIME)

- » Beverly Cleary is owned by the District.

# CONCORDIA

**ADDRESS**

2811 NE HOLMAN ST

**CURRENT OWNER**

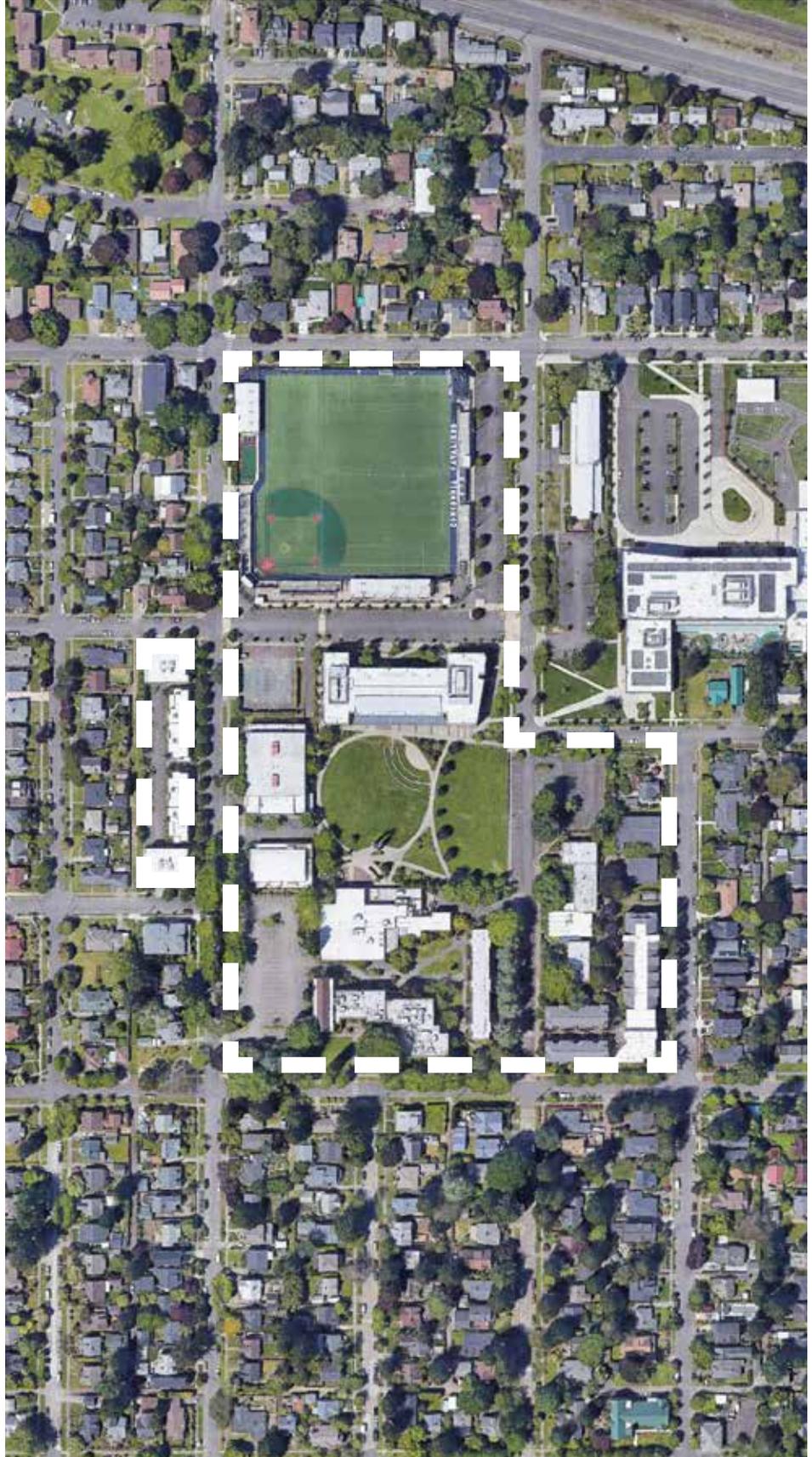
CONCORDIA UNIVERSITY

**SITE AREA**

18.88 ACRES

**ZONING**

CI1 - CAMPUS INSTITUTIONAL 1





HARRIET TUBMAN CATCHMENT

## LOCATION

- » Concordia is outside the Harriet Tubman catchment area. The site is nearly two miles northeast of the Harriet Tubman catchment boundary.

## SITE SUITABILITY

- » At almost nineteen acres, Concordia contains more than sufficient land area to support a middle school program.
- » The site does not meet criteria as it lacks transit, is fully built out, far larger than needed, would require zone change and comp plan amendment rendering the development availability impossible.

## DEVELOPMENT AVAILABILITY (TIME)

- » This parcel is not available for purchase. It is documented here for discussion purposes only.

# DAWSON PARK

**ADDRESS**  
1 N STANTON

**CURRENT OWNER**  
CITY OF PORTLAND

**SITE AREA**  
2.05 ACRES

**ZONING**  
OS - OPEN SPACE





HARRIET TUBMAN CATCHMENT

## LOCATION

- » Dawson Park is located several blocks north of the existing Harriet Tubman Middle School building.

## SITE SUITABILITY

- » At two acres, Dawson Park has insufficient land area to support middle school programming.
- » The site is flanked to the east and west by two high-traffic streets: N Vancouver Ave and N Williams Ave. On the other side of N. Vancouver to the west, is the Legacy Medical Center; to the east is a patchwork of commercial and residential zones.
- » All pedestrian access is challenged by the two neighborhood collectors, N Vancouver Ave and N Williams Ave, on either side of the site. Connection to the neighborhood to the east is limited for this reason.
- » The existing Harriet Tubman middle school site is the smallest (in terms of land area) in the district with only three acres and benefits from its adjacency to Lillis Albina Park. No such adjacency exists at Dawson Park.
- » The site lacks sufficient acreage for development and the District does not support displacement

of amenities supporting the historically Black neighborhood.

## DEVELOPMENT AVAILABILITY (TIME)

- » Dawson Park is currently owned by the City of Portland. It is not available for purchase or development. It is documented here for discussion purposes only.

# N. STANTON

**ADDRESS**  
625 N STANTON ST

**CURRENT OWNER**  
CITY OF PORTLAND

**SITE AREA**  
5.27 ACRES

**ZONING**  
IG1 - GENERAL INDUSTRIAL 1





HARRIET TUBMAN CATCHMENT

## LOCATION

- » N. Stanton is located within the Harriet Tubman catchment area immediately east of Legacy Medical Center.

- » The district has not started a dialogue with the City around relocating Harriet Tubman Middle School at this site.
- » At this time it is unknown whether the City would consider sale or shared use of the site.

## SITE SUITABILITY

- » While the parcel is over five acres, the parcel geometry would challenge successful athletics programming on the site.
- » The site sits within a patchwork of commercial and industrial areas with no meaningful access to the residential areas. To the west, the site is bracketed by I-5 and I-405; to the east, the medical center interrupts any potential pedestrian access to the Eliot neighborhood.
- » The site is not considered viable. Since it is adjacent to both I-5 and I-405, the risk of repeating the environmental harm at the existing Harriet Tubman site is high.

## DEVELOPMENT AVAILABILITY (TIME)

- » N Stanton is currently owned by the City of Portland.

# 432 NE KILLINGSWORTH ST

**ADDRESS**

432 NE KILLINGSWORTH ST

**CURRENT OWNERS**

CITY OF PORTLAND & BOYS AND GIRLS CLUB

**SITE AREA**

4.26 ACRES

**ZONING**

CM3 - COMMERCIAL MIXED USE 3

CM2 - COMMERCIAL MIXED USE 2





HARRIET TUBMAN CATCHMENT

## LOCATION

- » Located at the corner of NE Killingsworth and NE MLK Jr, this site is located in the north-central area of the Harriet Tubman catchment area.

## SITE SUITABILITY

- » At less than five acres, supporting middle school programming at the corner of NE MLK Jr Blvd and NE Killingsworth st would be challenging, especially athletics. The parcel sits immediately to the east of a major city traffic street: NE MLK Jr and another high-traffic street to the north — NE Killingsworth St. These two streets limit safe access to the Humboldt neighborhood to the west. To the east, the immediate vicinity is predominately commercial with few direct connections to the Vernon neighborhood.
- » The site is flanked on the north and west by high-traffic streets which further complicating safe athletics programming on this site.
- » The site is not considered viable as it would displace historically Black businesses, have significant safety issues given the surrounding streets and would limit access and be a long and uncertain path to property acquisition.

## DEVELOPMENT AVAILABILITY (TIME)

- » For the purposes of this study, two parcels were combined. Negotiations would need to be successful with both owners.
- » The district has not started a dialogue with either owner around relocating Harriet Tubman Middle School to the sites.
- » At this time it is unknown whether the current owners would consider sale or shared use of the site.

# PBOT

**ADDRESS**

3150 N MISSISSIPPI AVE

**CURRENT OWNER**

CITY OF PORTLAND

**SITE AREA**

5.51 ACRES

**ZONING**

IG1 - GENERAL INDUSTRIAL 1





HARRIET TUBMAN CATCHMENT

## LOCATION

- » PBOT is located within the Harriet Tubman catchment area Northeast of where Fremont Bridge and the I-5 meet.

of relocating important City services.

## DEVELOPMENT AVAILABILITY (TIME)

- » PBOT is currently owned by the City of Portland.

## SITE SUITABILITY

- » With over five acres, PBOT could support middle school programming with careful site design and early consideration of athletics space requirements.
- » The site currently serves various functions for the Portland Bureau of Transportation (hence the moniker, “PBOT”). The parcel sits immediately north of the I-5 and I-405 exchange. Access to areas south of the site is impossible because of the freeways. To the north, the site is bound by a commercial zone and, to the northeast, a residential area, and Boise-Eliot Elementary School.
- » Pedestrian access to and throughout the site is poor. Sidewalks are limited. Connections to the neighborhood to the northeast are indirect and circuitous.
- » This site is not considered viable due to its proximity to two freeways, the lack of neighborhood connections and the complication

# THUNDERBIRD WAY

**ADDRESS**

4013 NE 18TH AVE

**CURRENT OWNERS**

PORTLAND TRAIL BLAZERS & STATE OF OREGON

**SITE AREA**

3.71 ACRES

**ZONING**

CX - CENTRAL COMMERCIAL





HARRIET TUBMAN CATCHMENT

## LOCATION

- » The Thunderbird Way site is outside the Harriet Tubman catchment area, south of the Broadway bridge and near BESC and the Moda Center.

## SITE SUITABILITY

- » At less than four acres, Thunderbird Way does not contain sufficient land area to support middle school programming, especially athletics.
- » The site geometry would also challenge any development; it is too narrow for most school functions.
- » The site is bound by a set of train tracks, the Willamette River, and N. Interstate Ave. The surrounding context is predominantly commercial, connections into and out of the site are poor, and the pedestrian network is fragmented.
- » This location is not considered viable due to size, location and air quality concerns.

## DEVELOPMENT AVAILABILITY (TIME)

- » The site is privately owned.

- » The district has not started a dialogue with the owners around relocating Harriet Tubman Middle School at this site.
- » At this time it is unknown whether the current owners would consider sale or shared use of the site.

# APPENDIX B

## SUPPORTING DOCUMENTS

- » 2022 State Investment Request
- » PPS Letter to Oregon Transportation Commission
- » Oregon Transportation Commission Letter to PPS
- » Environmental Safety & Health Considerations
- » Indoor and Outdoor Air Quality Health Risk Assessment
- » PPS Resolution 5856 - March 19, 2019
- » PPS Resolution 6008 - December 3, 2019
- » PPS Resolution 6354 - July 27, 2021

# APPENDIX B

## SUPPORTING DOCUMENTS

- » 2022 State Investment Request
- » PPS Letter to Oregon Transportation Commission
- » Oregon Transportation Commission Letter to PPS
- » Environmental Safety & Health Considerations
- » Indoor and Outdoor Air Quality Health Risk Assessment
- » PPS Resolution 5856 - March 19, 2019
- » PPS Resolution 6008 - December 3, 2019
- » PPS Resolution 6354 - July 27, 2021



# RELOCATING HARRIET TUBMAN MIDDLE SCHOOL



## BACKGROUND

Over the course of decades, the Historic Albina neighborhood -- the heart of Oregon’s historic Black community -- has experienced harm caused by the construction and presence of the I-5 freeway. Since Black families had their homes and businesses demolished to make way for construction of the freeway and other “urban renewal” projects nearly fifty years ago, the air pollution and increased traffic associated with the freeway have negatively impacted the health of neighborhood residents and their quality of life. The resulting displacement and disinvestment in the Albina neighborhood is part of our community’s shared history.

The Federal-Aid Highway Act of 1956 originally provided funds to construct the interstate, in the process demolishing

several hundred housing units and constructing the freeway immediately adjacent to what was then Eliot Elementary, which had opened in 1952. The creation of Harriet Tubman Middle School in the early 1980s at the former Eliot School site has historical significance, as it played a pivotal role in the struggle over school desegregation and racist busing policies in Portland during the 1960s-1980s. Harriet Tubman has served PPS students in the Albina neighborhood since the early ‘80s, and then in 2018 reopened as a middle school as part of a district-wide Middle School Framework to provide students with a more comprehensive and equitable middle school experience and better preparation for high school. For this framework to be successful long-term, it is essential that students are educated in a building that is not negatively impacted by

significant adjacent project construction and longer-term negative impacts from unhealthy ambient air quality, noise, and vibrations.

The location of the freeway directly adjacent to the school has created enduring environmental impacts. Today the exterior area of Harriet Tubman is functionally unusable for school purposes. As currently designed, the proposed I-5 Rose Quarter Improvement Project would further cut into the Harriet Tubman Middle School site, threatening to worsen the environmental situation and negative health impacts, both during construction and over the long term.

The image below is of the existing Harriet Tubman Middle School site and demonstrates the current proximity of the interstate to the school. The

interstate expansion will exacerbate existing environmental hardships and threaten the western edge of the site.

**FIGURE 1: EXISTING CONDITIONS AT HARRIET TUBMAN MIDDLE SCHOOL**



site area for a middle school is between six and nine acres.

Of utmost importance in the siting of the new Harriet Tubman are improved environmental conditions from the existing school location.

To this end, the district has reviewed more than twenty mid-sized, potentially suitable properties, both within and near the Albina neighborhood that meets the district criteria. While no single site clearly stands as an obvious candidate to the exclusion of all others, the district has enough information to generate the cost ranges described in figure 2 below.

Many important considerations remain unknown at this time: first among many is whether any existing program operating at a site could be relocated to another site within an acceptable timeline.

**FIGURE 2: PRELIMINARY COST ESTIMATE RANGE**

	COST ESTIMATE RANGE		
	%	LOW	HIGH
LAND		\$15,000,000	\$30,000,000
HARD COSTS		\$54,791,520	\$64,320,480
SOFT COSTS	15%	\$8,218,728	\$9,648,072
FFE	10%	\$6,301,025	\$7,396,855
SITE DEVELOPMENT	12%	\$8,317,353	\$9,763,849
SWING SITE	0%	\$0	\$0
ADMINISTRATION	4%	\$3,105,145	\$3,645,170
CONTINGENCY	15%	\$12,110,066	\$14,216,164
ESCALATION	VARIES	\$19,936,190	\$23,403,353
TOTAL		\$127,780,026	\$162,393,944
<b>ROUNDED TOTAL</b>		<b>\$128,000,000</b>	<b>\$162,000,000</b>

## PROPOSAL

Utilize state funds to relocate and rebuild Harriet Tubman Middle School to address the patterns of entrenched racism that have negatively impacted the Albina neighborhood for generations and address the additional environmental harm contemplated by the future interstate expansion.

Portland Public Schools is actively studying nearly twenty sites.

## DEVELOPMENT PROPOSAL

Few sites within the Harriet Tubman catchment area meet the land area required for a middle school. In addition to the building area (over 100,000 SF of instructional space), outdoor play/athletics space, parking, setbacks, among other site conditions, must be considered. The optimal

## SCHEDULE

Due to the proximity to the site and location of construction access roads, work on the Eliot Viaduct will directly impact the safety and learning of students at Harriet Tubman Middle school. Recent construction schedules provided to the district from ODOT indicate this work will begin in June of 2027, suggesting the Harriet Tubman students must be relocated by August 2027.

Working backward from August 2027, the district can use our recently constructed Kellogg Middle School to infer the necessary duration to build a middle school. Kellogg Middle School opened in August of 2021 after four years of planning, design, and construction. The process began in May 2017 with procuring architectural and engineer services. Planning, design, and permitting took approximately two years; construction also took two years.

Comparing Kellogg with the development proposal described above, it's worth noting a number of asymmetries between the processes. First, the district already owned the parcel for Kellogg Middle School. Not all sites currently under consideration are within the district's control. In these cases, the district must negotiate with the current property owner for sale, lease, or trade for the land. If the current property owner is another government agency, there will likely be a public process around the property purchase. District staff estimate a minimum of six months would be required for property negotiations.

To further address potential differences between

Kellogg and the current study, the existing zoning for Kellogg allowed school use through a conditional land use process — a familiar and predictable administrative process for granting land-use approval for schools. Some parcels currently under consideration do not allow school use. These parcels will require comprehensive plan amendments — a process that requires City Council approval. A comprehensive plan amendment is in no way guaranteed. If the district pursues a parcel that does not allow school use, it does so at risk.

Returning to the inferences we can make from the assumed I-5 construction schedule and the timeline from Kellogg Middle School, the district should identify and begin procurement for design services by August 2023. However, lessons learned from previous projects, including Kellogg, suggest additional time for procurement and planning are prudent, to say nothing of time for scheduling contingencies to address unexpected or unknown site conditions, supply-chain issues, or labor shortages.

Accounting for lessons learned and scheduling contingencies, work on any site currently within the district's control should proceed no later than November 2022 to relocate Harriet Tubman students successfully. In the case where the district does not own the selected parcel, an additional six months of property negotiations prior to any planning or design will be necessary. In this latter case, the district must identify a site by May 2022 to relocate Harriet Tubman students by August 2027.

The preliminary schedule is presented below in figure 3.

FIGURE 3: PRELIMINARY PLANNING AND CONSTRUCTION SCHEDULE





## PORTLAND PUBLIC SCHOOLS

501 North Dixon Street / Portland, OR 97227

Telephone: (503) 916-2000

Mailing Address: P. O. Box 3107 / 97208-3107

June 6, 2019

Tammy Baney, Chair  
Alando Simpson  
Oregon Transportation Commission  
355 Capitol Street NE  
Salem, OR 97301-3871

Dear Chair Baney and Commissioner Simpson,

On behalf of Portland Public Schools (“PPS”), please submit this correspondence into the public record of the I-5 Rose Quarter project file in response to your letter of May 31, 2019. In the May 31<sup>st</sup> letter you provide an update on your efforts to convene an executive advisory committee to offer “advice only” on important project changes to, and related impacts from, the I-5 Rose Quarter project that are intended to respond to stakeholder comments. Attached to your May 31, 2019 letter is a copy of your April 29, 2019 Key Outcomes summary based on the “I-5 Rose Quarter Project Conversation.”

In the Key Outcomes document, you plainly agree, “ODOT needs to conduct further analysis on the Rose Quarter project. In particular, more needs to be known about the implications to Harriet Tubman Middle School and more conversations about highway covers, their alignment and structural capacity, all informed by additional engineering expertise, need to occur.” (Emphasis added). The May 31<sup>st</sup> letter repeats this admission that further study and analysis is needed to understand the real and significant impacts on Harriet Tubman Middle School.

While we appreciate outreach efforts to impacted parties, this outreach and future analysis has come too late in the process and does not alter our legal assessment that the project requires a full Environmental Impact Statement (“EIS”).

As we previously stated during the public comment period, although the proposed project is immediately adjacent to PPS properties, in particular the Harriet Tubman Middle School, neither ODOT nor the City meaningfully engaged with PPS during the planning process to assess the potential impacts, either short-term or long-term, on the health of students and staff from environmental hazards or on the structural integrity of PPS facilities from incursions on PPS property during construction.

We have raised substantial questions about potential impacts on PPS properties, including risks to soil stability under the Harriet Tubman Middle School site during the construction process, increased air pollution, increased noise pollution, and shifts to traffic patterns in the vicinity of both Tubman and District headquarters.

{00900400;1}

Harriet Tubman Middle School recently invested in a state-of-the-art air quality system to protect students in that school from substandard air quality based on adjacency to the existing highway corridor. The PPS investment of over \$17 million cannot protect these students from the already poor outdoor air quality, and this project will further challenge that outdoor air quality in closer proximity to the school.

The May 31<sup>st</sup> letter and accompanying Key Outcomes document now seem to recognize the nature and significance of these impacts. This impact analysis is not the proper subject matter for an after-the fact, advisory-only committee. Instead, this is the kind of analysis that ODOT has a duty to evaluate in the initial project assessment to determine whether an EIS is justified. ODOT's refusal to adequately address these significant environmental issues and unique populations in the environmental assessment process was in error, and to now ask us to engage in that analysis outside of the EA/EIS process is not acceptable.

Due to the potential significant negative short-term and long-term impacts of the proposed project to PPS property, students, staff, and stakeholders, Portland Public Schools believes that neither ODOT nor the FHWA can legitimately issue a Finding of No Significant Impact (FONSI). As ODOT now seems to agree, additional study and analysis is necessary to understand the full extent of the impacts on PPS property and whether based on those impacts, our PPS property remains a viable and environmentally safe location for our staff, teachers and students.

We appreciated the invitation to meet with you and other stakeholders of ODOT's I-5/Rose Quarter transportation construction project on April 29th. However, we object to ODOT's plans to proceed with the request for proposal (RFP) contracting process associated with this project. Until our request for further environmental analysis and assessment and the concerns expressed on behalf of the Harriet Tubman Middle School and lower Albina community have been addressed, we cannot support this project moving forward.

Therefore, PPS will continue to advocate that the project be subject to an EIS so that we fully understand the short and long-term scope and impacts to this community's health, safety and well-being.

Sincerely,

Scott Bailey  
Board of Education, Portland Public Schools

Julia Brim-Edwards  
Board of Education, Portland Public Schools

Stephanie Soden  
Chief of Staff, Portland Public Schools



# Oregon

Kate Brown, Governor

**Oregon Transportation Commission**

Office of the Director, MS 11

355 Capitol St NE

Salem, OR 97301-3871

July 10, 2019

Portland Public School Board of Education  
501 N. Dixon Street  
Portland, OR 97227

Dear Ms. Soden:

This is a follow up response to your June 6<sup>th</sup> letter and the July 3<sup>rd</sup> response from the Oregon Transportation Commission (OTC) Chair Baney and Commissioner Simpson.

We understand that Portland Public Schools (PPS) is asking for additional analysis of the I-5 Rose Quarter Improvement Project (Project), or at a minimum a better understanding of the analysis that has already been conducted, as it relates to the short- and long-term health of Harriet Tubman Middle School students and staff from environmental hazards such as air pollution and noise and the structural integrity of the PPS facilities. Ensuring the safety of students and staff is a core value that we share, and one that is guiding our approach to this Project. We remain committed to continued collaboration between our agencies to ensure the Project affords positive outcomes for the community and future generations. We have many more opportunities to engage in the future and are committed to working with you and your staff at the school as we move forward.

As we presented to the Portland Public School Board on March 19, 2019, the Project's Environmental Assessment (EA) is based on preliminary design and the physical footprint for the design concept. The preliminary project design evaluated in the EA reflects the recommended design concept from the ODOT and City of Portland 2012 I-5 Broadway Weidler Facility Plan and N/NE Quadrant Plan. The EA follows federal practices for evaluating project effects, including an understanding the impacts at the Harriet Tubman Middle School site.

As project design progresses, we will better understand the specific effects to areas surrounding the project to appropriately plan, design, or mitigate for them. We will also pay special attention to the concerns you have shared with us – environmental, health, and structural integrity – to ensure the mitigation measures described in the EA to reduce potential impacts are carried forward through design and construction. This work will be done in close coordination with interested stakeholders, including PPS.

We too want to ensure students, staff and the surrounding community have safe air to breathe. To best understand air pollutant and GHG emissions, the EA used the most current modeling approaches and traffic data from the regionally-adopted Metro Regional Transportation Plan. The analysis found that, when the project moves forward, future pollutant and GHG emissions will be slightly less when compared to projected levels without the project. The reduction in emissions will be due to improved traffic flow and less idling traffic on I-5 with the project.

We are committed to the reduction of noise pollution. The project, as evaluated in the EA, proposes the construction of a sound wall between I-5 and Harriet Tubman Middle School. The proposed sound wall would reduce the noise level below what it is today, improving the noise environment for students and staff. We will work with PPS during the proposed sound wall design.

The structural integrity of the school also is of utmost importance. The project includes a retaining wall between I-5 and Harriet Tubman Middle School to provide enhanced slope stability and retain the soils in proximity to the school. This is an area where specific PPS collaboration and input will be critical, including collaboration on the soils analysis, retaining wall design type and construction method. In the near term, we plan to perform geotechnical work and collect soil samples to better understand the soil conditions in the vicinity of the school, provide additional data to PPS regarding the slope stability, and inform the retaining wall and sound wall designs. This work will include targeted boring locations on ODOT and PPS property west of the school. Our team will be connecting with you to coordinate this work and request access to the proposed study area, with the intent of completing this work between mid-July and early August to avoid any overlap with the school year.

While we do expect short-term impacts from construction activities such as dust, construction noise levels and traffic delays, the EA identified mitigation strategies for reducing these impacts, such as scheduling construction activities proximate to the school during the summer months, implementing dust control measures and maintaining traffic control to provide accessible, safe and comfortable alternative travel routes for pedestrians and bicyclists, including in the vicinity of the school. Refining and coordinating these mitigation measures will again require significant collaboration between ODOT and PPS.

Moving forward, we are actively working with the Federal Highway Administration (FHWA) to review and respond to the public comments received during the 45-day public review period. These public comments, along with the technical analysis provided in the EA, will inform FHWA's National Environmental Policy Act (NEPA) decision document. We understand that additional coordination with PPS is needed as the Project moves forward and look forward to future conversations to produce positive outcomes for our community, students, staff, and the traveling public. Should you have any questions, please do not hesitate to contact me at [megan.channell@odot.state.or.us](mailto:megan.channell@odot.state.or.us) or 503-731-3087.

Sincerely,

A handwritten signature in cursive script that reads "M Channell".

Megan Channell, AICP  
Rose Quarter Project Director  
ODOT, Region 1



September 3, 2021

Joe Crelier, ARM  
Director of Risk Management  
Portland Public Schools  
501 N Dixon Street  
Portland, Oregon 97227

Via email: jcrelier@pps.net

Regarding: Environmental Report – Freeway Widening Project  
Harriet Tubman Middle School  
2231 N Flint Avenue  
Portland, Oregon 97227  
PBS Project 25000.203

Dear Mr. Crelier:

PBS Engineering and Environmental Inc. (PBS) has prepared this letter summarizing various environmental safety and health considerations related to the widening of the Interstate 5 (I-5) freeway alongside Harriet Tubman Middle School (HTMS) located at 2231 N Flint Avenue in Portland, Oregon (site).

### **PROJECT UNDERSTANDING**

PBS understands that Oregon Department of Transportation (ODOT) plans to widen the I-5 freeway alongside HTMS, which would include converting a portion of land along the western edge of the school to transportation land use. Current plans include construction of approximately 400 linear feet of new retaining wall along I-5, within approximately 20 feet of the school. Design of the wall is currently ongoing but will reportedly be a 5-foot-diameter secant or tangent pile wall with maximum exposed height of up to 20 feet. ODOT has submitted information related to the proposed design of the widening plan as well as projections relating to potential impacts to the environment surrounding the project.

### **BACKGROUND**

HTMS was built in 1952, originally as Eliot Elementary School. It is situated in the Eliot neighborhood in the Albina area of Portland, just east of I-5. After World War II, Portland residents approved a measure to modernize and construct Portland Public School buildings to address the increase in families to the area as a result of wartime industry. During the war, and particularly after the 1948 Vanport flood, an influx of African Americans moved to Albina. In 1962, I-5 construction cut a wide swath through the Eliot neighborhood, demolishing homes and displacing many citizens, subsequently resulting in a population decrease in the area from the disconnection of the street grid and large increase in commuter cars going through the area.

This acquiring of properties in predominantly African American neighborhoods was all too common whether it be for construction of freeways or for commercial development. While the proposed widening of the freeway corridor does not represent seizing school property per se, it does appear to ignore the historical damage the freeway has caused this neighborhood and ignores the opportunity to make whole some of the damage that was caused.

With respect to future health and safety impacts to HTMS, the ODOT submittal focuses primarily on long-term projections relating to ambient air quality adjacent to the freeway corridor and freeway corridors in general. It is clear that over the last 20 years air quality adjacent to freeways has improved largely due to improvements in tailpipe emission standards and fuel formulations. This trend is compelling and will likely hold true in the long term. These projections, however, do not address likely short-term adverse impacts that could result from an increase in freeway capacity during morning and afternoon commutes when there would likely be more cars idling during periods of heavy traffic. The projections also do not account for possible regressions in both tailpipe emission standards and in fuel formulations. Nor do the progressions consider possible impacts related to climate change. When asked to clarify these specific concerns the ODOT response was incomplete.

One final glaring omission in the ODOT submittal is any recognition of the Environmental Protection Agency (EPA) document "School Siting Guidelines." This document unequivocally shows that freeways and schools do not mix. Freeways present a significant and measurable negative impact to the environment and the locating, or in this case the widening, of freeways in the vicinity of a school building will result in an environment that can harm students.

## **GEOTECHNICAL CONDITIONS AND POTENTIAL IMPACTS**

The site is roughly rectangular except for the southwestern corner, which has been truncated by an adjacent slope along I-5. The slope is approximately 3H:1V (horizontal to vertical), with a maximum elevation of approximately 138 feet above mean sea level on the school property, sloping downward to a retaining wall with a maximum height of approximately 14 feet that supports the slope. The approximately 20-foot-wide area between the school and adjacent slope is paved. Our current understanding is that the school building is supported on pile foundations.

Based on information presented by ODOT during the coordination meeting with Portland Public Schools (PPS) on May 4, 2021,<sup>1</sup> the school rests on approximately 30 feet of fill overlying fine-grained Missoula flood deposits ranging in thickness from approximately 10 to 30 feet, all underlain by alluvial sand deposits.

Under contract with PPS, Rhino One Geotechnical installed three inclinometers and two vibrating wire piezometers at the site and presented the results in an instrumentation monitoring report dated August 2019.<sup>2</sup> Inclinometer measurements indicated no measurable lateral or vertical movements around the time of installation. The groundwater monitoring indicated an increase in groundwater level in September 2018, from a depth of 40 feet to 35 feet below the ground surface, followed by relatively consistent groundwater levels over the remainder of the monitoring period.

ODOT's preliminary analyses suggest supporting the I-5 freeway widening with a tangent pile wall consisting of one row of 5-foot-diameter drilled shafts. At the time this information was presented to PBS, no tiebacks were deemed necessary to stabilize the wall.

A tangent pile wall consists of a series of vertical, drilled shafts that touch the adjacent piles. The drilled shafts are constructed of concrete and typically reinforced with steel rebar. The shaft is drilled to the target depth, removing

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<sup>1</sup> Oregon Department of Transportation (ODOT). (May 4, 2021). PPS Technical Coordination for I-5 Rose Quarter Improvement Project.

<sup>2</sup> Rhino One Geotechnical. (August 14, 2019). Instrumentation Monitoring Report: August 2019. Portland, Oregon. Prepared for Portland Public Schools. Rhino One Project PPS-2017-010.

soil cuttings in the process. The rebar is typically inserted into the open hole before it is filled with concrete. A secant pile wall is similar to a tangent pile wall, except that in a secant pile wall, piles overlap several inches. In addition, only every other pile may be reinforced with steel rebar.

Tangent pile walls are often used when limiting deformation of the wall is critical, such as when the wall is supporting a structure. In addition, the construction of tangent pile walls involves drilled shafts, as opposed to driven piles, and typically produce lower levels of vibration during construction, which could help limit disturbance or structural damage to the school. In our opinion, given the school is on deep foundations, small magnitudes of deformation of the wall would be less likely to result in structural damage.

Based on information presented by ODOT during the coordination meeting with PPS on May 4, 2021, the existing wall and slope between I-5 and the school is seismically unstable. The new wall system proposed by ODOT would meet the current standard for seismic loading, resulting in an increase in seismic stability of the adjacent slope. Improved seismic stability decreases the risk of failure of the slope during a seismic event, which in turn reduces the risk of structural damage to the school. PBS recommends that the seismic design consider the impact from a 2,500-year earthquake, consistent with the current Oregon Structural Specialty Code, rather than the 1,000-year event, which is typically considered for transportation projects.

For a 400-foot-long, 5-foot-diameter tangent pile wall, with an average exposed wall height of 10 feet and 20 feet of embedment, approximately 2,100 cubic yards of soil would need to be exported. The volume of exported soil would require more than 200 dump truck trips. This assumes a swell factor of 20% and dump trucks with a 10-cubic-yard capacity.

While the ODOT submittal supports the installation of the tangent wall in order to provide increased seismic stability of HTMS, it does not discuss how the original placement of the freeway corridor has compromised the seismic stability of the school and adjacent hillside. It is PBS' opinion that ODOT has an obligation to provide seismic reinforcement of the school building whether or not the freeway is widened.

## **ENVIRONMENTAL HEALTH AND SAFETY IMPACTS AND PLANNED/POSSIBLE MITIGATION**

### **Construction Period Operations Impacts (Noise, Environmental, Access/Egress)**

The installation of retaining wall piles along the border between HTMS and the subsequent widening of the I-5 freeway will be a significant undertaking that will have detrimental short-term impacts on the fundamental utility of HTMS and to the surrounding neighborhood. Use of semi-permanent cranes, the flow of dump trucks and cement trucks through the property, and the mobilization of countless construction workers and their vehicles will at times bring all neighborhood traffic to a standstill. The development of a comprehensive traffic control plan can help attenuate some of these impacts but there will be significant impacts nonetheless.

While some of the project traffic surfacing will be paved, the moving of large quantities of soil will result in the deposition of construction soil on both the school property and the neighboring roadways. Dirt and debris that is tracked off from construction sites is a safety concern and can present an environmental hazard. Use of vehicle tire/wheel washes can reduce soil deposition to the surrounding neighborhood. Chemical analysis of soils on the project have indicated the presence of a variety of contaminants that could be made airborne without the implementation of aggressive dust controls. Any wastewater generated from dust mitigation measures should be captured in order to perform an appropriate characterization of possible environmental contamination.

During the project there will be temporary and semi-permanent impacts to neighborhood traffic depending on the final traffic control plan that is developed and implemented for the project. These will hinder access to the property for students, staff, and parents. These effects will evolve over the course of the project as various phases of the construction are completed. Emergency access and egress to the property for emergency services providers may be hindered as well.

### **Post-Construction Period Impacts (Noise, Environmental, Access/Egress)**

Based upon review of the ODOT submittal, the widening of the freeway will have a minimal effect on the long-term noise levels in and around HTMS. The ODOT submittal goes further and presents noise barrier wall scenarios that will reduce long-term overall noise levels at HTMS. The ODOT submittal does not address the deleterious effects of the current noise levels at HTMS that are the direct result of the existing freeway traffic. Nor does the ODOT submittal address increases in short-term transient noise levels that would be presented during periods of heavier (due to the wider freeway) traffic congestion that will coincide with morning and afternoon commutes. It is unfortunate that these periods of increased traffic congestion will occur at the very times students are outdoors preparing to start their school days and outdoors getting ready to go home.

The installation of sound attenuation barriers along freeways is ubiquitous. They are most often seen in areas where freeways pass through residential neighborhoods. Almost without exception they are masonry panel structures that rise to an elevation of up to 10 feet or more. These systems are effective at deflecting noise generated by freeway traffic. Noise levels aside, these barriers rarely improve the livability of the area being protected. What was once a view of the horizon will become a gray masonry surface that is subject to vandalization, physical damage, long-term maintenance costs, and ultimately end of life replacement. Also, noise barriers work both ways; all noise generated in the vicinity of HTMS will now be reflected directly back to the school building. These noises could include vehicle operations, equipment operations, various warning signals (trucks backing up, fire alarms, car alarms, etc.), children playing, and conversation. The ODOT submittal makes no mention of potential increases in noise levels from noises generated at HTMS.

### **EXISTING ENVIRONMENTAL CONDITIONS AND POTENTIAL SOIL AND GROUNDWATER IMPACTS**

Soil studies on the project have documented chemical contamination of the soil. These levels are generally low. Potential exposures to these chemical contaminants would likely be limited to the duration of construction period operations (see above). Upon completion of the construction project, there would be no significant exposure to existing contaminated soil. All surfaces exposed during the project would be either covered with paving or covered with clean soil that would then be seeded.

ODOT to date has not analyzed groundwater on the site for chemical contamination. Considering the depth to groundwater in the vicinity of the project, it is not likely that the construction operations would create an unacceptable conduit for the mobilization of these soil contaminants into the existing groundwater. As a precaution, before and after construction groundwater samples could be analyzed for those contaminants of concern that have been identified in the soils on the HTMS project.

### **SHORT-TERM AND LONG-TERM IMPACTS TO AIR QUALITY**

Over the past decade, the freeway's effect on air quality in the HTMS vicinity has been extensively studied and shows that there are measurable adverse impacts to the air quality at HTMS. The negative impacts are consistent with the "School Siting Guidelines" document. The ODOT submittal relies on both national projections of air quality parameters around freeways and the findings of an air pollution modeling tool—MOVES. The modeling tool utilizes a variety of parameters to predict air quality trends related to freeway traffic. Parameters entered into

this modeling software include miles driven over the roadway, a profile of vehicles in use, the aging out of older vehicles, fuel types, and quality and weather dynamics including temperature, prevailing wind directions, humidity, and precipitation. To better understand the MOVES air quality predictions, ODOT was presented with the following questions:

ODOT was asked if there was a resolution to the predictions that would allow a person to determine short-term impacts on an hour-by-hour basis because the greatest exposure concerns to students would likely occur during morning and early afternoon hours which coincide with periods of heaviest congestion on the freeway. The ODOT response was that the predictions are more geared toward long-term, average conditions (24-hour averages).

ODOT was asked if the long-term air quality impact predictions were made considering a possible climate change scenario where ambient temperatures were higher. ODOT's response was that speculative parameters were not used but that "Temperature is a very sensitive parameter across all pollutants and vehicle types."

ODOT was asked if the predictions could be separated into narrower time bands; the predictions as presented were for 2045. The ODOT response was that the predictions are more geared toward long-term, average conditions (24-hour averages).

Considering this latest information from ODOT, it is PBS' opinion that the model predictions relating to air quality impacts associated with the I-5 freeway do not provide sufficient resolution to determine if air quality conditions will be better or worse in the short-term or during the times when students would be at greatest risk of environmental exposures associated with the freeway.

## **CONCLUSIONS AND RECOMMENDATIONS**

At this time, it is PBS' opinion that the I-5 freeway presents an unacceptable air quality and noise risk to the safe and healthful operation of HTMS and that the widening of the freeway will not change this.

Based upon review of the ODOT submittal, it is clear that any increase in noise to HTMS associated with the widening project will be minor and easily mitigated. It should be understood, however, that current freeway noise near HTMS is significant and that these impacts will continue despite installation of the proposed noise barriers.

PBS sees no compelling information to indicate that there would not be short-duration adverse air quality impacts to HTMS resulting from the widening of the freeway. It is possible that air quality conditions at 8:00 am and at 3:00 pm during school days will be worse at HTMS because of this project.

ODOT has recognized that the current shoring system between HTMS and the freeway is unstable. This condition is the result of the original establishment of the freeway and should be corrected whether the freeway is widened or not.

If you have any questions regarding this information, please call me at your convenience. I can be reached at 503.417.7597 or douglas@pbsusa.com with any questions or comments.

Sincerely,

Douglas Hancock, CIH, CSP  
Senior Project Manager

DH:mo



**Harriet Tubman Middle School**  
**Indoor and Outdoor Air Quality Health Risk Assessment**

**Prepared by**  
**William Lambert, PhD**  
**August 19, 2019**

## 1.0 Executive Summary

The design and installation of the HVAC system for Harriet Tubman Middle School was developed out of concern for the health of students and staff. Portland Public Schools recognized that the outdoor air at the school was impacted by traffic-related air pollution from I-5, and potentially by area industry. Preliminary air monitoring conducted in March and April of 2018 confirmed the need for an HVAC system with filtration for particles and gases to prevent sustained daily exposure. Renovation of the school building and installation of the HVAC system was completed in August. To evaluate the performance of the particle filters and the charcoal sorption bed, a new round of monitoring was conducted in September and October, with measurements made at the air intake and within the air handling units of the HVAC system. These measurements confirmed that the HVAC system achieved protective levels of indoor air quality at the time of occupancy. A third round of monitoring was conducted at the end of the school year, in April and May of 2019. Measurements at this time confirmed the HVAC system continued to provide a high level of removal of particles and gases.

This report provides an analysis of the adequacy of the HVAC system to minimize the health risks posed by air pollution at Harriet Tubman Middle School. The measurements of the various components of traffic-related air pollution are evaluated against available federal and state air quality standards, and published governmental and scientific literature. The report also evaluates the potential health risks from exposure to outdoor air pollution during physical education and lunch periods.

The five key conclusions from the health analysis are:

1. Indoor levels of air pollution are very low. For each of the pollutants monitored, the filtered air delivered to the classrooms and interior spaces of the school is clean, safe and supportive of health for students and staff.
2. Particle and gas removal by the HVAC system and its filtration systems remained consistently high across the school year.
3. Outdoor levels of particulate matter (PM<sub>10</sub>, and PM<sub>2.5</sub>) and the gases carbon monoxide (CO) and nitrogen dioxide (NO<sub>2</sub>) are below federal air quality standards, and therefore pose no concern for health during physical activities.
4. Certain pollutants associated with diesel exhaust (ultrafine particles and black carbon) were observed at elevated levels typical of locations near heavily travelled highways. The HVAC system provides a high level of protection against exposure in the classrooms and interior of the building.
5. The health risks of short-term exposures to diesel pollution are not known, and regulatory limits have not been established. However, sufficient toxicological and epidemiological evidence exists to recommend that outdoor physical education activities be scheduled in the later morning and afternoon when traffic pollution is much lower. This recommendation is made with an abundance of caution, recognizing that some students, such as those with asthma, may be more susceptible to adverse effects of traffic-related air pollution.

## **2.0 Introduction**

Increasing public health attention to traffic-related air pollution (TRAP) compelled Portland Public Schools (PPS) to design and install a heating, ventilation, and air conditioning (HVAC) system with filtration for particles and gases during the modernization of Harriet Tubman Middle School. The predominant concern was the reduction of day-to-day exposures to TRAP that have been associated with reduced lung growth in children, and increased risk for the development (onset) of asthma and exacerbation (triggering) of asthma attacks. The commitment to install the HVAC system by PPS also acknowledged emerging health research concerns for individual components of TRAP, specifically diesel particulate matter. Extensive air monitoring studies were conducted by scientists from Portland State University to characterize the outdoor air quality and confirm the adequacy of the performance of the HVAC filtration system to provide clean air to classrooms and indoor spaces at the school. Air quality measurements were first made in the April 2018, and were conducted again in the September and October following installation of the HVAC system and building occupancy. Another cycle of measurements was made in April and May of 2019 to evaluate outdoor-indoor conditions after 7 months of air handling system operation.

The PSU team conducted a monitoring on a comprehensive set of individual pollutants that comprise TRAP. The set of pollutants include the “criteria pollutants” carbon monoxide (CO), nitrogen dioxide (NO<sub>2</sub>), particulate matter (PM<sub>10</sub> and PM<sub>2.5</sub>) whose health effects are widely recognized and for which federal regulatory standards exist (NAAQS Table). Ultrafine particles (UFP), black carbon (BC), and volatile organic compounds (VOCs) are constituents of diesel exhaust and these forms of PM were also monitored. Specific air quality standards do not exist for these diesel pollutants, however, evidence from animal toxicology research and ongoing epidemiologic studies support concern for children as particularly susceptible to the adverse respiratory effects of long-term exposure to diesel particulate pollution (HEI 2010; HEI 2013; Guarnieri and Balmes 2014).

This report provides an opinion on the health risks posed to students and staff at Harriet Tubman Middle School using the measured exposures in outdoor and indoor air. This analysis follows a weight-of-evidence approach that applies federal health-based standards when available, and applies information from published studies for pollutants which lack regulatory guidelines.

## **3.0 Carbon Monoxide**

### **3.1 Relevant Background**

Carbon monoxide (CO) is a toxic asphyxiant gas that is hazardous because of its specific ability to bind to hemoglobin and to reduce the ability of the blood to deliver oxygen to tissues. As a component of motor vehicle emissions, CO penetrates to indoor spaces with high efficiency because this gas has very low chemical reactivity. These same physical and chemical properties limit engineering abilities to economically remove CO gas when present in the intake air of building ventilation systems. To protect public health, regulatory emphasis has been placed on reducing CO emissions from motor vehicles through the cleaner formulations of gasoline fuels, motor/vehicle inspection maintenance programs, and reducing emissions from wood stoves, fireplaces, open burning, and industrial sources. CO trends

for Oregon and Portland have steadily declined over the past 5 decades and currently the second highest 8-hour average occurring in a year is less than 2 ppm (<https://www.oregon.gov/deq/FilterDocs/2017aqannualreport.pdf> ). Although CO from motor vehicle emissions disperses quickly under most conditions, poor traffic flow and congestion can lead to elevated exposures for motor vehicle occupants and persons in close proximity to highways. CO concentrations measured at microscale sites have declined in the same proportions as concentrations recorded at monitors representing larger urban regions. Ambient monitoring at near-road locations indicate that the federal standards are not exceeded, and this protection is attributed to greatly improved control of motor vehicle emissions (e.g., clean burning fuels, improved light-duty engine design, and catalytic convertors). Measurements of ambient CO at the Oregon DEQ I-5 Tualatin near-roadway air monitoring station have not recorded exceedances of federal standards during 2015 to 2017 (maximum 8-hour averages = 1.4 ppm).

The health risks of CO have been long recognized and CO is one of the original six “criteria” air pollutants defined in the Clean Air Act of 1970. The current National Ambient Air Quality Standard (NAAQS) for carbon monoxide is 35 ppm over a 1-hour averaging time and 9 ppm over an 8-hour averaging time (<https://www.epa.gov/criteria-air-pollutants/naaqs-table> ). These levels are based on an extensive evidence base from epidemiologic studies and controlled exposure studies on human subjects (<https://cfpub.epa.gov/ncea/risk/recordisplay.cfm?deid=218686&CFID=78776911&CFTOKEN=81884369> ). The two averaging times prevent blood carboxyhemoglobin levels from reaching 2%, the level at which chest pain (angina pectoris) is triggered in exercising adults with coronary artery disease, and to protect pregnant women and the developing fetus from hypoxic stress and low birth weight outcomes. As a point of reference, carboxyhemoglobin concentrations in cigarette smokers range from 3-8% and symptoms of intoxication and acute poisoning generally appear above 20%, although symptoms and clinical states of acute CO poisoning correlate poorly with level of carboxyhemoglobin (Raub 2000).

### **3.1.2 HTMS Outdoor and Indoor Levels**

The distribution of school-day average CO concentrations during Portland State University’s Phase II (September-October) and Phase III (April-June) monitoring periods is presented in Figure 1. During the Fall, outdoor carbon monoxide levels averaged 0.4 ppm (432 ppb) over the 9 AM to 4 PM school day. The maximum school-day average was 1.4 ppm (1434 ppb). 95 percent of the outdoor air school-day averages in the Fall were below 0.6 ppm (639 ppb).

In the Fall, measurements of CO levels at the supply air point of the HVAC system, representing air that has been filtered of particles and passed through the charcoal bed, contained substantially lower concentrations of CO relative to the outdoor air. Approximately 44% removal was observed. However, measurements of the return air were essentially equal to the concentrations measured in outdoor air, suggesting CO infiltration through the building envelope.

In the Spring, the outdoor average level was 0.09 ppm (90.8 ppb), considerably lower than the Fall average. 95% of the school-day averages were below 0.2 ppb (236 ppb). Concentrations in the supply air were identical with the outdoor air. Although CO has not been removed from the air supplied to the

interior space of the school, these levels are below the NAAQS of 9 ppm averaged over 8 hours. Measurements of CO in the return air, representing the mixed air of the entire interior of the school, averaged 0.07 (73.9 ppb). This small difference in the air concentration is not appreciable, and is supportive of improved balancing of air delivery and minimization of infiltration in the Spring.

### **3.1.3 Implications for Health**

Although the levels of CO in outdoor air were higher in the Fall than in the Spring, these school-day average levels of 0.4 ppm and 0.2 ppm are well below the NAAQS 9 ppm 8-hour average. Even the highest school-day average of 2.2 ppm is only one-fourth the level of the NAAQS. Thus, exposures of students and staff to CO at Harriet Tubman Middle School do not differ from those expected to be received at their residences or during commuting.

Measurements of ambient CO in the Portland area by the Oregon DEQ at Portland monitoring stations and do not exceed the NAAQS. For example, during 2008-2017, maximum 8-hour averages measured by the DEQ at the SE Lafayette neighborhood site ranged from 1.3 to 3.1 ppm, and for the near-roadway site at Tualatin I-5 during 2015-17 maximum 8-hour averages range from 1.3 to 1.4 ppm (Oregon Air Quality Annual Report 2017).

In summary, the monitoring data from Fall 2018 and Spring 2019 at HTMS confirm that concentrations of CO are consistently low and do not present a health risk to students and staff.

## **3.2 Nitrogen Dioxide**

### **3.2.1 Relevant Background**

Nitrogen dioxide (NO<sub>2</sub>) is an irritant gas that combines with water on respiratory tract tissues to form nitric (HNO<sub>3</sub>) and nitrous (HNO<sub>2</sub>) acids. When inhaled in high concentrations, NO<sub>2</sub> results in edema and bronchopneumonia. At lower concentrations, short term (acute) exposures to NO<sub>2</sub> are associated with exacerbation of asthma caused by the constriction of the smooth muscle of the conducting airways and increased mucous production. Longer term exposures at low levels are associated with the development of asthma in children. The health effects of NO<sub>2</sub> are well documented in experimental studies in animals, and in controlled human exposure and epidemiologic studies (<https://cfpub.epa.gov/ncea/isa/recordisplay.cfm?deid=310879>). As a chemical class, nitrogen oxides are principal components of motor vehicle emissions, and NO<sub>2</sub> is specifically regulated as a criteria pollutant under the Clean Air Act. In recognition of the need to protect against both acute and chronic exposures, the current NAAQS for NO<sub>2</sub> are 100 ppb averaged over 1 hour and 53 ppb averaged over 1 year (<https://www.epa.gov/criteria-air-pollutants/naaqs-table>).

Over the past decade, Oregon DEQ monitoring data at the Portland neighborhood site, highest hourly averages of NO<sub>2</sub> have been near 40 ppb (<https://www.oregon.gov/deq/FilterDocs/2017aqannualreport.pdf>). Over 2015 to 2017, the daily maximum concentrations from the I-5 near-roadway station in Tualatin has also tracked in the 35-40 ppb range. Thus, the maximum concentrations measured at urban locations in Portland are well below

the federal standard of 100 ppb. Similarly the annual NO<sub>2</sub> average for the neighborhood and near-roadway monitoring sites has consistently tracked near 10 ppb and 13 ppb, respectively; also well below the federal standard of 53 ppb.

### **3.2.2 HTMS Outdoor and Indoor Levels**

The distribution of school-day average NO<sub>2</sub> concentrations during the Fall and Spring monitoring periods is presented in Figure 2. In the Fall, outdoor NO<sub>2</sub> levels averaged 13.0 ppb over the 9 AM to 4 PM school day. The highest school-day average was 67.6 ppb. 95 percent of the daily averages were below 30 ppb, and 75 percent were below 20 ppb. The mean supply air average was 0.89 ppb, indicating a high level of removal by the air handling system. The mean NO<sub>2</sub> levels in return air was 6.92 ppb. Despite the apparent infiltration of outdoor NO<sub>2</sub> through the building envelope, indoor NO<sub>2</sub> levels are approximately one-half of the levels observed in outdoor air.

In the Spring monitoring period, the school-day average of 7.3 ppb was substantially lower than concentrations observed in the Fall. Supply air concentration averaged 2.8 ppb, again indicating substantial removal by the HVAC system. Return air NO<sub>2</sub> concentrations averaged 0.9 ppb, substantially lower than the supply air and possibly indicating reaction of NO<sub>2</sub> with indoor surfaces and occupants.

Outdoor NO<sub>2</sub> levels measured by passive samplers placed on the school grounds, the adjacent city park, and neighborhood streets provided one-week average measurements that were comparable to the levels measured in outdoor air at the HVAC intake unit, and demonstrated reductions in levels with increasing distance from the I-5 highway.

### **3.2.3 Implications for Health**

NO<sub>2</sub> is not simply an indicator of other traffic-related pollutants, and this oxidant gas has independent effects on the respiratory system. High short-term exposures are associated with asthma attacks, and with bronchoconstriction and airway inflammation. These health effects are observed independent of other traffic-related pollutants, such as PM<sub>2.5</sub> and black carbon. Further, repeated and persistent exposure to NO<sub>2</sub> across years results in the development of allergic responses and structural changes to the airways of the child, damaging lung growth. Because the respiratory effects of NO<sub>2</sub> appear to occur across both short- and long-term time scales, the U.S. EPA developed standards for both 1-hour and annual averaging times to provide protection against triggering asthma attacks, and against asthma development.

Indoor concentrations of NO<sub>2</sub> in the school, as represented by the levels measured in return air to the HVAC system in the Fall and Spring, averaged 6.9 and 0.88 ppb, respectively. These school levels are very low relative to the 1-hour standard of 100 ppb and the annual standard of 53 ppb, and are likely lower than levels of exposure experienced by students and staff in their homes and neighborhoods.

Outdoor concentrations averaged 13 ppb across the 9 AM to 4 PM school day in the Fall and 7 ppb in the Spring. These levels are higher than neighborhood background and reflect the influence of traffic

emissions from I-5, but they are well below the federal standards of 100 ppb 1-hour average and 53 ppb annual average.

The maximum school-day average concentration was 67.6 ppb in the Fall of 2018, and 75% of school-day averages during this monitoring period were less than 20 ppb. These levels are substantially lower than the concentrations known to trigger changes in lung function and symptoms in panel studies of asthmatic children (U.S. EPA *Integrated Science Assessment for Nitrogen Oxides*, 2016). The concentrations associated with increased airway responsiveness range from 200 to 300 ppb for 30 min, and 100 ppb for 1 hour. The concentrations associated with allergic inflammation are 581 ppb for 15 min and 260 ppb for 30 min. Therefore, the observed levels of NO<sub>2</sub> in outdoor air surrounding the school buildings and the park are below levels of concern for this susceptible group of children.

### **3.3 Particulate Matter**

#### **3.3.1 Relevant Background**

As type of air pollution, particulate matter (PM) includes finely divided solid and liquid materials that are suspended and move in the air. The size distribution of particles can vary greatly, and the mixtures of depend on the types of sources. The smaller size classes of particles are of greater health concern because they have the capability to bypass the normal defenses of the upper respiratory tract and can be inhaled deeply into the lungs where they can be deposited and cause harm.

Two principal classes of particle sizes are used in federal air pollution standards: “PM<sub>10</sub>” which are particles smaller than 10 microns in diameter and able to be inhaled through the nose. Soil dust, pollen, and mold particles are in this size range. “PM<sub>2.5</sub>” is comprised of particles that are 2.5 microns and smaller, and includes the class of particles that are called “fine” (diameters of 0.1 to 2.5 μm) and “ultrafine” (0.01 to 0.1 μm). Combustion processes generate this size fraction, and some of the fine and ultrafine particles of PM<sub>2.5</sub> may contain liquid acid condensates, organic compounds, and heavy metals, increasing their toxic potential. The health effects of particulate matter include respiratory system irritation, lung damage, the development of chronic obstructive pulmonary disease (COPD), and heart attacks (U.S. EPA. *Integrated Science Assessment for Particulate Matter (External Review Draft)*, 2018).

Particulate matter air pollution is measured as weight (mass) per cubic meter of air, and the federal standards are defined using these units. The NAAQS for PM<sub>10</sub> is 150 micrograms per cubic meter (μg/m<sup>3</sup>) averaged over a 24-hour period. The NAAQS for PM<sub>2.5</sub> is 35 μg/m<sup>3</sup> averaged over a 24-hour period and 12 μg/m<sup>3</sup> averaged over one year.

#### **3.3.2 HTMS Outdoor and Indoor Levels**

The school-day average levels of outdoor PM<sub>10</sub> were relatively low during the Fall monitoring period (Figure 3). At this time, PM<sub>10</sub> averaged 2.58 μg/m<sup>3</sup> with an interquartile range of 1.40 to 3.30 μg/m<sup>3</sup>. PM<sub>10</sub> concentration in the supply air averaged 0.14 μg/m<sup>3</sup> indicating high removal capacity by the HVAC filtration system. A small increase of PM<sub>10</sub> was observed in the return air, which averaged 1.20 μg/m<sup>3</sup>, and can be attributed to re-suspended interior dust and infiltration. Outdoor PM<sub>10</sub> levels were higher in

the Spring, with average levels at  $7.39 \mu\text{g}/\text{m}^3$  and an interquartile range of  $5.28$  to  $9.33 \mu\text{g}/\text{m}^3$ . High removal efficiency was observed again; supply air concentrations of  $\text{PM}_{10}$  averaged  $3.08 \mu\text{g}/\text{m}^3$  and the return air average concentration were essentially the same at  $3.11 \mu\text{g}/\text{m}^3$ . In summary, the outdoor levels of  $\text{PM}_{10}$  are considerably lower than the  $150 \mu\text{g}/\text{m}^3$  per 24-hour average NAAQS, and the school's HVAC system effectively filters  $\text{PM}_{10}$  to very low indoor levels.

Outdoor air concentrations of  $\text{PM}_{2.5}$  were also consistently low in both the Fall and Spring (Figure 4). In the Fall,  $\text{PM}_{2.5}$  averaged  $2.13 \mu\text{g}/\text{m}^3$  with an interquartile range of  $1.06$  to  $2.86 \mu\text{g}/\text{m}^3$ . Thus, outdoor levels are below the NAAQS of  $35 \mu\text{g}/\text{m}^3$  24-hour average and  $12 \mu\text{g}/\text{m}^3$  annual average. In the Spring,  $\text{PM}_{2.5}$  averaged  $2.69 \mu\text{g}/\text{m}^3$  with an interquartile range of  $1.25$  to  $3.85 \mu\text{g}/\text{m}^3$ . Effective removal capacity of  $\text{PM}_{2.5}$  by the HVAC system was observed in both seasons. Return air concentrations averaged  $0.72 \mu\text{g}/\text{m}^3$  in the Fall and  $0.71$  in the Spring, demonstrating very low  $\text{PM}_{2.5}$  exposures to building occupants.

### **3.3.3 Implications for Health**

Both  $\text{PM}_{10}$  and  $\text{PM}_{2.5}$  in outdoor air were measured at concentrations below the federal standards in both the Fall and Spring seasons, supporting the conclusion that particulate matter pollution from I-5 does not present a health hazard for students and staff. The HVAC system was specifically designed to remove particles in this inhalable and respirable size range, and large removal efficiencies were observed in both monitoring seasons, providing evidence of air handling system stability across the entire school year. Because students are in the filtered indoor environment during the majority of the school day, their total exposure to particulate matter is likely reduced relative to the exposures they would have received at their residences full-time.

The potential health risks associated with short-term particulate matter exposure during outdoor activities must be considered. The U.S. EPA's *Integrated Science Assessment for Particulate Matter (2018)* combines the evidence from controlled animal studies employing short-term exposures on markers of lung injury and oxidative stress. These toxicological studies provide insight into the potential mechanisms of respiratory health effects (biological plausibility) and assist with the interpretation of epidemiologic evidence. While multiple studies of long-term  $\text{PM}_{2.5}$  exposure provide coherent evidence to support a causal role in the development of asthma in children, the evidence to support short-term effects on asthma attacks is much more limited. Collectively, the available epidemiologic studies on children with asthma in U.S. cities provide weak support for aggravation of asthma symptoms at 24-hour average concentrations typically experienced in urban areas. The shared limitations of these studies include reliance on self-reported symptoms, incomplete adjustment for co-occurring pollutants, use of modelled personal exposure from central monitoring sites, and the potential for the constituents of  $\text{PM}_{2.5}$  (elemental carbon, ultrafine particles), rather than  $\text{PM}_{2.5}$  mass itself, to explain the observed outcomes. Further, the ambient concentrations in these studies are substantially higher than levels observed outdoors at the school where average school-day  $\text{PM}_{2.5}$  levels in the Fall of 2018 were  $2.13 \mu\text{g}/\text{m}^3$ . Mean 24-hour  $\text{PM}_{2.5}$  concentrations are greater than  $15 \mu\text{g}/\text{m}^3$  in studies of emergency department visits and hospital admissions for asthma (Sarnat et al. 2015; Ostro et al. 2016), and those studies considering respiratory symptoms and asthma medication (Rabinovitch et al. 2006; Mann et al. 2010; Spira-Cohen et al. 2011).

In summary, the outdoor concentrations of PM<sub>10</sub> and PM<sub>2.5</sub> at HTMS are below federal standards, and are safe for students and staff, including those with asthma. The school's HVAC system further reduces these concentrations to create an indoor environment which has very low levels of PM<sub>10</sub> and PM<sub>2.5</sub> pollution.

### **3.4 Black Carbon**

#### **3.4.1 Relevant Background**

Black carbon (BC) is an important component of particulate matter, and is emitted during the combustion of biomass and fossil fuels. In particular, BC in the ultrafine particle fraction is used as a marker of diesel exhaust and is argued to be a useful alternative measure to particle mass (PM<sub>10</sub> and PM<sub>2.5</sub>) because health risks may be qualitatively and quantitatively different due to unique physical and chemical properties of BC (Jannsen et al. 2011). Diesel exhaust is a complex mixture of gases and ultrafine particles of a diameter less than 0.1 µm. No single chemical constituent of diesel exhaust can serve as a unique marker of exposure (Grahame, Klemm, and Schlesinger 2014), but taken together, fine particles (PM<sub>2.5</sub>), BC, ultrafine particle counts provide a reasonably complete characterization of diesel exhaust levels.

The available epidemiologic evidence on the health effects of diesel exhaust goes back to the 1990s but the studies are challenging to interpret because exposures are not precisely quantified. Further, the studies were conducted in occupational settings and on healthy adult male workers, therefore the levels of exposure are above the range observed in the community setting and must be extrapolated with some uncertainty to women, children, and the elderly. Although no federal air quality standard for BC or diesel particulate matter exists, the health hazard is recognized (Health Effects Institute, 2015). The health endpoint of regulatory concern has been lung cancer and risk assessments are based on lifetime exposure scenarios. However, the U.S. EPA and the World Health Organization have withdrawn their previously published unit risk estimates, ostensibly because the most appropriate metric to represent diesel exhaust exposure remains unknown. PM<sub>2.5</sub> elemental carbon (EC) has been used as a surrogate to date, but it is not expected that EC itself is the toxicologically active agent. In 2010 and again in 2016, the Oregon Air Toxics Science Advisory Committee (ATSAC) reviewed the available literature on diesel particulate matter and recommended an Ambient Benchmark Concentration (ABC) of 0.1 µg/m<sup>3</sup> (equivalent to 100 ng/m<sup>3</sup>) which is very close to these previous risk estimates of the EPA and WHO, and assumes 70-year exposure duration and risk of 1 excess cancer in 1 million persons. This ABC was adopted by the Oregon Environmental Council in 2017, and provides a point of reference for evaluating potential health risk.

The possible effects of exposure to BC on neurodevelopment and cognition in school children have also been the subject of recent research efforts in Europe and the U.S (Basagana et al. 2016; Harris et al. 2016; Forns et al. 2017). These studies are motivated by the observation of translocation of ultrafine and fine particles from the lungs to the central nervous system in animal toxicology studies (Elder et al. 2006). The BREATHE Program in Barcelona, Spain followed 2,687 children in 265 classrooms in 39 schools, assessing attention with a computer-administered neurobehavioral test. Classrooms in these

schools are naturally ventilated and the penetration of outdoor PM<sub>2.5</sub> and NO<sub>2</sub> to the schools' indoor areas is high (Amato et al. 2014), and means that school children are exposed to elevated levels throughout the school day, indoors and outdoors. In the Barcelona classrooms, the mean NO<sub>2</sub> level was 15.8 ppb (11.9-18.9 ppb interquartile range) and the mean PM<sub>2.5</sub> elemental carbon was 1270 ng/m<sup>3</sup> (980-1240 ng/m<sup>3</sup> interquartile range). EC is measured using a thermal-optical transmittance, and BC is measured by optical reflectance - aethelometer. The BC:EC correlation is approximately 3:1 and varies with the source of soot emissions (Jeong et al. 2004). Converting the Barcelona EC values to BC yields 3810 ng/m<sup>3</sup> (2940-3720 ng/m<sup>3</sup> interquartile range). In another BREATHE publication, Sunyer et al. (2017) reported lower performance on attention tests for school children in the top exposure quartile of daily classroom EC and NO<sub>2</sub> relative to those in the bottom exposure quartile over a 12-month period. Basagana et al. (2016) reported reductions in cognitive growth in working memory and attentiveness across quartiles of classroom PM<sub>2.5</sub>, but these effects were not observed for EC or other measures of particulate matter. The most recent Barcelona publication by Forns et al. (2017) demonstrated that deficits in working memory and inattentiveness persisted over 3.5 years of follow-up and were associated with outdoor NO<sub>2</sub> and indoor (classroom) ultrafine particle counts, but not EC.

The Project Viva Cohort Study in eastern Massachusetts followed children from pre-birth to 8 years of age (Harris et al. 2016). Residence location was used to model exposure to outdoor BC and PM<sub>2.5</sub>. Children with higher mid-childhood exposure to BC and increased near-residence traffic density had greater problems with behavioral regulation as assessed by teachers, but no relationship was observed using parent report measures. The methods used in this report are similar to those of a 2008 analysis of Boston children (Fraco Suglia 2008). BC exposures were retrospectively estimated with a land-use regression model for 218 children in a cohort study for which neurocognitive assessments were available. BC was associated with decreased cognitive function across measurements of verbal and nonverbal intelligence, and memory.

In summary, the body of evidence for the independent effect of BC on cognitive development and function in children provides mixed evidence to support a causal hypothesis. The most reliable evidence comes from the Barcelona BREATHE Program which utilizes direct measurements of EC at schools, which is superior to the reliance on estimated exposure from land-use models used in other studies. The associations with cognitive deficits reported in the set of BREATHE papers suggests that traffic-related pollution as a whole is responsible for the observed neurodevelopmental effects. It is important to recognize that the schools and classrooms in the Barcelona studies rely on natural ventilation and indoor levels of pollutants are similar to those outdoors. In contrast, the HVAC system at Harriett Tubman Middle School effectively removes the fine particles and BC from traffic emissions and eliminates the hazard posed by sustained exposure to traffic air pollution throughout the school day.

### **3.4.2 HTMS Outdoor and Indoor Levels**

The distributions of BC concentrations in outdoor air, and the supply and return air locations in the HVAC system are presented in Figure 5. Levels of BC in outdoor air were appreciably higher in the Fall 2018 monitoring period than during the Spring of 2019, with mean school-day concentration averaging 1399 ng/m<sup>3</sup> and an interquartile range of 757 to 1925 ng/m<sup>3</sup>. In the Spring, mean school-day average BC

was 829 ng/m<sup>3</sup>, with an interquartile range of 290 to 1127 ng/m<sup>3</sup>. Thus, outdoor levels in both seasons exceeded the Oregon ABC. In both monitoring seasons, the HVAC system demonstrated large removal efficiencies for BC; approximately 95% in the Fall and 86% in the Spring. Very tight distributions of values were observed in the Spring for supply and return air, evidence of very good HVAC system performance.

In the Spring monitoring, BC was measured with a handheld aethelometer in the park and other outdoor areas surrounding the school, during lunchtime and afternoon hours. Median levels were comparable to those measured at the HVAC intake, ranging from 457 to 725 ng/m<sup>3</sup>. The median neighborhood background level, measured several blocks to the east of the school, was 333 ng/m<sup>3</sup>.

### **3.4.5 Implications for Health**

The outdoor concentrations of BC at HTMS are within expected ranges, and resemble distributions of BC measured in recent years at Oregon DEQ monitoring sites in Portland (Figure 6). The distribution of one-hour BC concentrations at the Portland North Roselawn neighborhood site measured during 2010 to 2016 had a mean of 718 ng/m<sup>3</sup>. At the Portland SE Lafayette over 10 months in 2010, a very similar distribution and mean of 745 ng/m<sup>3</sup> was observed. BC monitoring at the Tualatin I-5 near-roadway site over 2014 to 2016 averaged 1293 ng/m<sup>3</sup>. In comparison, the Fall season outdoor average at HTMS was 1623 ng/m<sup>3</sup> and in the Spring was 829 ng/m<sup>3</sup>. This comparison shows that outdoor levels of BC at HTMS are higher than residential neighborhood background levels in Portland, and are very similar to those measured at the DEQ near-roadway monitoring station, even though this DEQ site is a relatively long distance away in Tualatin.

Indoor BC exposure levels, as represented by return air concentrations, are very low, indicating a high level of protection for students and staff, with average school-day concentrations of 233 and 158 ng/m<sup>3</sup> in the Fall and Spring, respectively. While these indoor levels are higher than the 100 ng/m<sup>3</sup> ABC, they are within the uncertainty bounds of the risk estimate used to set this guideline, and the protection achieved by the HVAC system is very high. During the indoor time of the school day, students and staff experience lower exposures than they would likely receive in their homes or during commuting.

## **3.5 Ultrafine Particles**

### **3.5.1 Relevant Background**

As described earlier in Section 3.3, particulate matter (PM) is regulated in two size ranges, PM<sub>10</sub> and PM<sub>2.5</sub>. PM<sub>10</sub> is the total mass of particles less than 10 micrometers (microns or μm) in aerodynamic diameter. Similarly, PM<sub>2.5</sub> is the mass of particles less than 2.5 μm in diameter. PM<sub>2.5</sub> is also called *fine* particle mass. PM<sub>10</sub> minus PM<sub>2.5</sub> gives the *coarse* particle mass. Ultrafine particles (UFP) represent that size fraction of particulate matter less than 0.1 μm in diameter. Because the individual particles in UFP have very little mass, other measures such as particle count and surface area have been used for toxicity testing in animal experiments.

Ultrafine particles are poorly soluble and when they deposit by diffusion they readily pass into epithelial tissues because of their tiny dimensions. If deposited in the nasal passages, these particles can translocate through the olfactory nerve into the brain. When deposited in the respiratory tract, UFP can pass via blood or lymph, where they can distribute to other organs of the body, such as the heart.

The physical and chemical properties of PM vary greatly, and toxicity of the mixture of particulate matter is determined by size, chemical composition, and solubility. This is a major source of variability in the effects for particulate matter, where mass is used as the metric of exposure. For example, the PM<sub>2.5</sub> mass contains the mass of the UFP fraction, but this mass is relatively small compared to the weight of particles in the PM<sub>2.5</sub> – PM<sub>0.1</sub> fraction, and PM<sub>2.5</sub> mass does not accurately represent the presence of UFP. Thus, the use of particle counts to represent UFP exposure and dose has gained favor. Certainly, the application of a single set of federal air quality standards has practical advantages for monitoring and regulation, but the PM<sub>10</sub> and PM<sub>2.5</sub> standards are acknowledged to have limitations for public health protection. Epidemiologic studies of the effects of UFP have only recently been conducted, and the evidence for independent health effects of UFP is limited (HEI Panel on the Health Effects of Traffic-Related Air Pollution, 2010; HEI Review Panel on Ultrafine Particulates, 2013; Weichenthal et al. 2017).

### 3.5.2 HTMS Outdoor and Indoor Levels

Figure 7 presents the distribution of ultrafine particle counts for outdoor air, and supply and return air points in the HVAC system. Mean UFP counts are averaged over the 9 AM to 4 PM school day. In the Fall, UFP counts averaged 24908 particles/cm<sup>3</sup>, with an interquartile range of 17949 to 27170 particles/cm<sup>3</sup>. The HVAC system removed these particles very efficiently; the average count in supply air was 1484 particles/cm<sup>3</sup> and the return air was 1067. A walking transect conducted inside the school yielded a mean count of 461 particles/cm<sup>3</sup> and an interquartile range of 264 to 498 particles/cm<sup>3</sup>. Much lower counts were measured in outdoor air during the Spring monitoring period. The mean was 829 particles/cm<sup>3</sup>, with an interquartile range of 290 to 1127 particles/cm<sup>3</sup>. Particle filtration by the HVAC system continued to perform efficiently in the Spring, with mean supply air counts of 117 particles/cm<sup>3</sup> (interquartile range 62-151 particles/cm<sup>3</sup>) and mean return air counts of 158 (interquartile range 107 to 156 ng/cm<sup>3</sup>).

The PSU air monitoring team conducted walking transects in Lillis Albina Park and outdoor areas surrounding the school on two days in the Fall monitoring period and two days in the Spring. Particle counts were higher in the Fall than the Spring. A summary of the relative concentration magnitudes for Fall is presented below:

Location	Time	Ultrafine Particle Counts (median, particles/cm <sup>3</sup> )	
		Wed Oct-10	Wed Oct-15
Park	Morning 8-9 AM	13,000	39,000
Park	Morning 9-10 AM	26,000	43,000
Lunch 1	Noon hour 11:15-12 PM	10,000	15,000
Lunch 2	Noon hour 12-12:45 PM	8,000	16,000
Park	Afternoon 1-2 PM	13,000	14,000

Dismissal on Flint Ave	Afternoon 3:30-4:15 PM	6,800	6,600
Neighborhood	Afternoon 4:15 & later	---	5,400

Two patterns are evident in this table. First, substantial day-to-day variation is observed. Second, UFP counts are highest in the morning hours on both days, and drop substantially by the first lunch period. This hourly profile may be attributed to reduced traffic emissions on I-5 as the morning rush hour ends, and because of warming atmospheric temperatures and increasing wind speed (Zhu et al. 2006). This outdoor pattern is evident in Figure 8 which presents the median UFP counts for the Spring monitoring period by outdoor location and time of day.

### 3.5.3 Implications for Health

Although air quality regulations currently do not address UFP, this class of submicron-sized particles may exert greater toxic effects compared with larger particle because of their greater surface area/mass ratio, chemical composition, deeper lung penetration, and ability to translocate to the systemic circulation and other organs. A recent workshop concluded that the current evidence base does not differentiate the effects of UFP from other particle size fractions and gaseous pollutants (Baldauf et al. 2016). The limited available epidemiologic literature focuses on adult respiratory and cardiac outcomes, and mortality. Studies considering children are beginning to be reported. For example, prenatal UFP exposure was associated with asthma onset by age 6 years in a recently published study from Ontario, Canada (Lavigne et al. 2019).

The lack of epidemiologic evidence and regulatory standards for UFP precludes a quantitative assessment of the health risks in the outdoor air surrounding the school. However, avoidance of sustained exposures to UFP counts exceeding 25,000/cm<sup>3</sup> seems advisable based on acute physiologic changes in blood pressure and micro-vascular function observed in exercising women exposed to high levels of traffic-related air pollution for short periods (Weichenthal, Hatzopoulou, and Goldberg 2014). While these physiologic changes are of uncertain health significance at this time, they do suggest the body is showing an oxidative stress response, and this would be expected to also occur in children.

UFP levels in the range of 25,000 particles/cm<sup>3</sup> were observed in outdoor areas surrounding Harriet Tubman Middle School during the morning hours of the Fall monitoring period. While the health risks of short-term exposures UFP are not known, and regulatory limits have not been established, sufficient toxicological and epidemiological evidence exists to recommend that outdoor physical education activities be scheduled in the later morning and afternoon when traffic pollution is much lower. This provides a margin of safety for students and staff who may be more sensitive to the adverse effects of traffic pollution (i.e., asthmatics).

## 3.6 Volatile Organic Compounds

### 3.6.1 Relevant Background

Volatile organic compounds are emitted as gases during combustion of gasoline and diesel fuels, and they are also emitted from indoor sources, including building materials and furnishings, office

equipment, and cleaning products. In fact, the concentrations of many VOCs are higher in indoor residential settings and public buildings, than outdoors (U.S. EPA Team Study, 1985). The health effects associated with exposure to VOCs include eye and upper airway irritation, asthma and allergic respiratory symptoms, headaches, dizziness, and nausea, memory impairment, damage to the liver, kidney and central nervous system, and for certain VOCs, cancer (Indoor Air Quality Scientific Findings Resource Bank, <https://iaqscience.lbl.gov/voc-sensory> ). The charcoal bed filter bank in the HVAC system at HTMS is designed to remove broad classes of VOCs from outdoor air. There are hundreds of organic compounds, therefore a reduced set of VOCs with relevance to TRAP or high toxic potential were selected for monitoring by the PSU team, and were monitored in the outdoor air, and the supply and return air streams of the HVAC system.

Currently, no federal standards have been set for VOCs, although guidelines and recommendations have been set by various professional organizations (ACGIH, <https://www.acgih.org/tlv-bei-guidelines/tlv-chemical-substances-introduction> ). The evidence for toxicity for VOCs that are commonly present in TRAP has been reviewed by the Air Toxics Science Advisory Committee (ATSAC) of the Oregon DEQ, and this advisory body has recommended Ambient Benchmark Concentrations (ABCs) for specific chemical compounds that were adopted by the Environmental Quality Commission of the State of Oregon in 2017 (<https://www.oregon.gov/deq/aaq/air-toxics/Pages/default.aspx> ). The ABCs are reviewed every 5 years and are based on the best available scientific evidence to derive an excess health effects risk (cancer, birth defect, organ damage) of 1-in-1 million from continuous inhalation exposure across a lifetime. This is the additional or extra risk of developing cancer due to exposure over the 70-year life of an individual. The ABCs include uncertainty factors to protect sensitive subgroups. Thus, the ABCs are health-based and provide a useful point of reference for evaluating population health risks, but it is incorrect to apply the ABCs to estimate the probability that an individual will experience an adverse health effect.

### 3.6.2 HTMS Outdoor and Indoor Levels

Levels of VOCs in the Spring monitoring period represent the typical occupancy conditions of the school without the influence of construction activities and off-gassing of new building materials. Outdoor air measurements of these VOCs at HTMS were less than concentrations reported by DEQ for Portland neighborhood monitoring stations (Figures 9-11). Using measurements of VOCs in the return air to represent the indoor exposure of students in classrooms, each of these VOCs were well below Ambient Benchmark Concentrations.

Chemical	Portland Background µg/m <sup>3</sup>	Oregon DEQ ABC µg/m <sup>3</sup>	Outdoor Air µg/m <sup>3</sup>	Return Air µg/m <sup>3</sup>
Benzene	0.59	0.13	0.10	0.00
Toluene	1.12	5000	0.41	0.18
m-, p-Xylene	1.28*	200*	0.31	0.10
o-Xylene	1.28*	200*	0.11	0.04
Ethyl-benzene	0.3	0.4	0.08	0.01

\*mixed xylenes

### 3.6.3 Implications for Health

Indoor concentrations of VOCs were below the Oregon DEQ Ambient Benchmark Concentrations, indicating substantial protection while students and staff are indoors. Because students and staff are in this filtered air environment for the majority of their school day hours, their total daily exposure to VOCs is likely reduced relative to the total exposures they would receive when spending their day at their residence.

The potential for outdoor exposure to benzene during lunch and physical education activities exists. However, short-term exposures to benzene are not known to be associated with adverse health effects. Oregon DEQ monitoring indicates that outdoor levels of benzene are elevated across the Portland metro area and generally exceed the ABC. Human activities that emit benzene are common include evaporation from gasoline fuels at service stations and from vehicles, vehicle exhaust, and industrial processes. Control of benzene from these anthropogenic sources has been a focus of the Portland Air Toxics Solutions program (PATS). Additionally, natural sources of benzene in outdoor air include wildfires, which have impacted Portland urban air quality in recent years. The principal health concern for benzene is damage to the bone marrow and blood-forming tissues, and acute myeloid leukemia, resulting from long-term (lifetime) exposure.

## 4. Conclusions

- For each of the pollutants monitored, the filtered air delivered to the classrooms and interior spaces of the school is clean, safe and supportive of health for students and staff.
- Particle and gas removal by the HVAC system and its filtration systems remained consistently high across the school year.
- Outdoor levels of CO, NO<sub>2</sub>, PM<sub>10</sub>, and PM<sub>2.5</sub> were below federal air quality standards.
- Outdoor levels of pollutants associated with diesel exhaust (black carbon and ultrafine particles) were observed at elevated levels typical of locations near heavily travelled highways.
- Outdoor levels of traffic-related air pollutants are consistently elevated in the early morning hours, but drop substantially by the first lunch period at 11:15 AM.

## 5. Recommendations

- To provide a margin of safety for students and staff who may have asthma, or be sensitive to traffic-related air pollution, outdoor physical education activities should be scheduled in the later morning and afternoon hours to avoid the highest daily outdoor levels.
- To ensure the continued high and effective performance of the HVAC system, continued monitoring of outdoor, supply and return air should continue at 3-month intervals until the operating characteristics of this unique system is confidently understood. In addition to providing assurance of health protection, this data will allow definition of a schedule of filter replacement that minimizes cost and waste.

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Figure 1. Plots of the median concentrations of carbon monoxide across the 9 AM – 4 PM school day. The height of the solid bars represents the median concentration. The ends of the whiskers represent the 25<sup>th</sup> and 75<sup>th</sup> percentiles. Concentration is expressed in parts per billion (ppb). The NAAQS is 9000 ppb averaged for 8 hours.

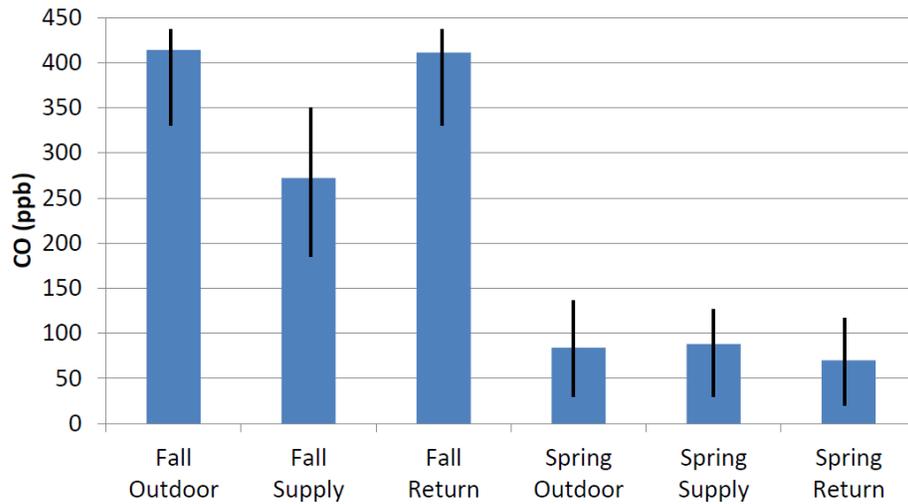


Figure 2. Plots of the median concentrations of nitrogen dioxide across the 9 AM – 4 PM school day. The height of the solid bars represents the median concentration. The ends of the whiskers represent the 25<sup>th</sup> and 75<sup>th</sup> percentiles. Concentration is expressed in parts per billion (ppb). The NAAQS is 100 ppb averaged for 1 hour.

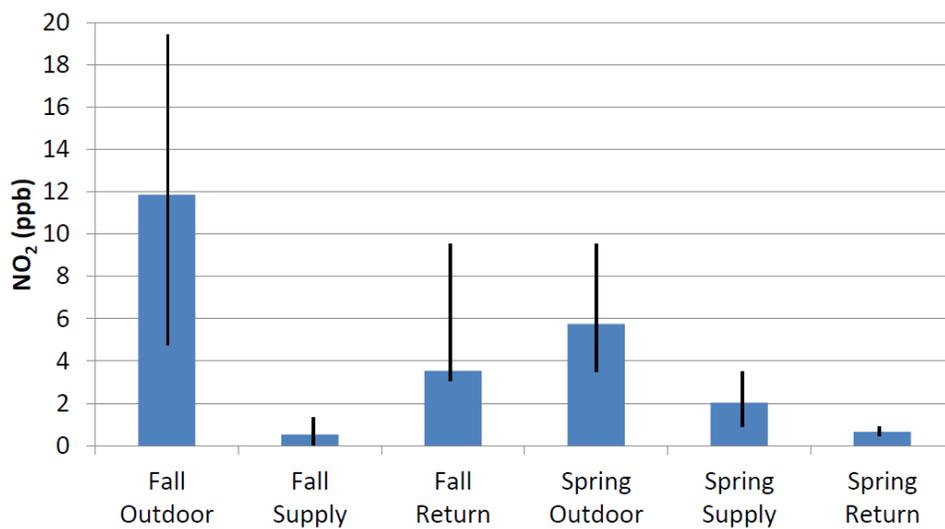


Figure 3. Plots of the median concentrations of PM<sub>10</sub> across the 9 AM – 4 PM school day. The height of the solid bars represents the median concentration. The ends of the whiskers represent the 25<sup>th</sup> and 75<sup>th</sup> percentiles. Concentration is expressed in micrograms per cubic meter (µg/m<sup>3</sup>). The NAAQS is 150 µg/m<sup>3</sup> averaged over 24 hours.

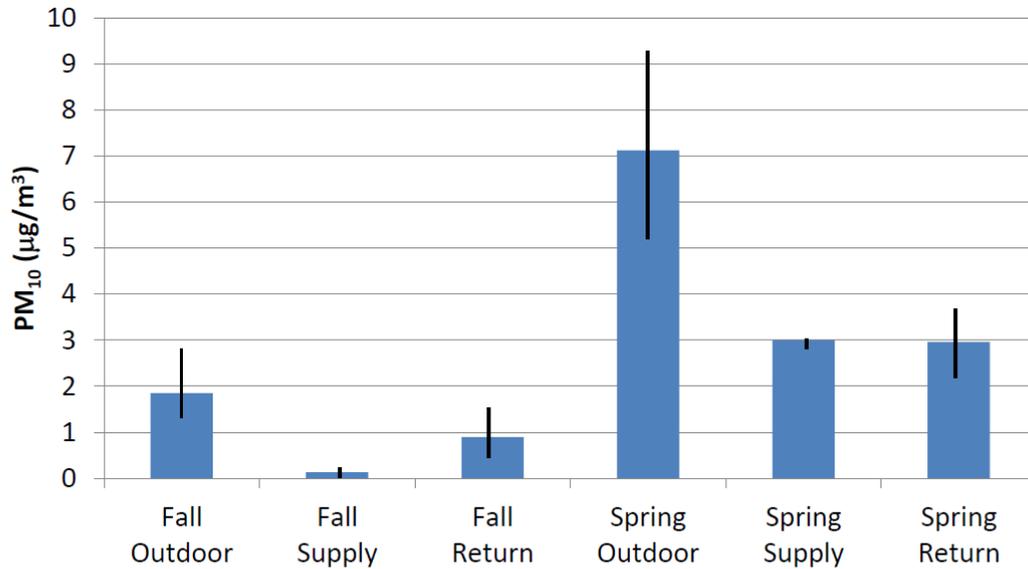


Figure 4. Plots of the median concentrations of PM<sub>2.5</sub> across the 9 AM – 4 PM school day. The height of the solid bars represents the median concentration. The ends of the whiskers represent the 25<sup>th</sup> and 75<sup>th</sup> percentiles. Concentration is expressed in micrograms per cubic meter (µg/m<sup>3</sup>). The NAAQS for PM<sub>2.5</sub> are 35 µg/m<sup>3</sup> 24-hour average and 12 µg/m<sup>3</sup> annual average.

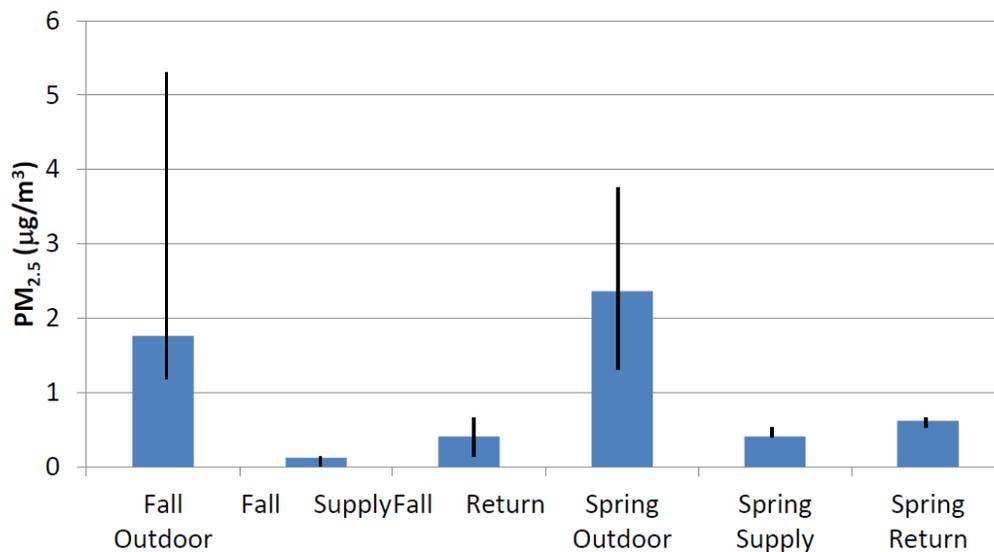


Figure 5. Plots of the median concentrations of Black Carbon across the 9 AM – 4 PM school day. The height of the solid bars represents the median concentration. The ends of the whiskers represent the 25<sup>th</sup> and 75<sup>th</sup> percentiles. Concentration is expressed in nanograms per cubic meter ( $\text{ng}/\text{m}^3$ ). There is no federal standard for BC.

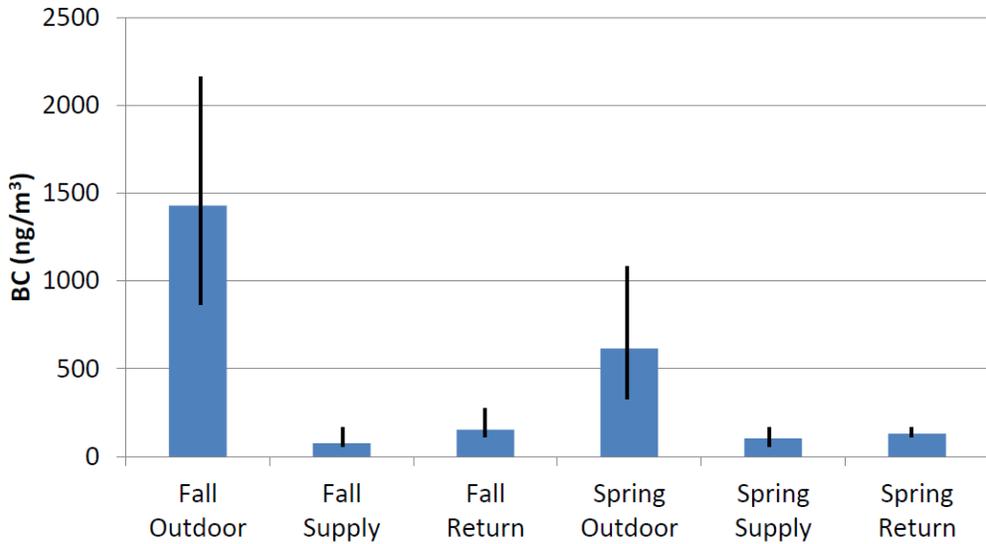


Figure 6. Plots of the distribution of one-hour average concentrations of Black Carbon measured at three Oregon DEQ monitoring sites (Portland N Roseland 2010-16, Portland SELafayette 2010, and Tualatin I-5 Bradbury Court 2014-16). The height of the solid bars represents the median concentration. The ends of the whiskers represent the 25<sup>th</sup> and 75<sup>th</sup> percentiles. Concentration is expressed in nanograms per cubic meter ( $\text{ng}/\text{m}^3$ ).

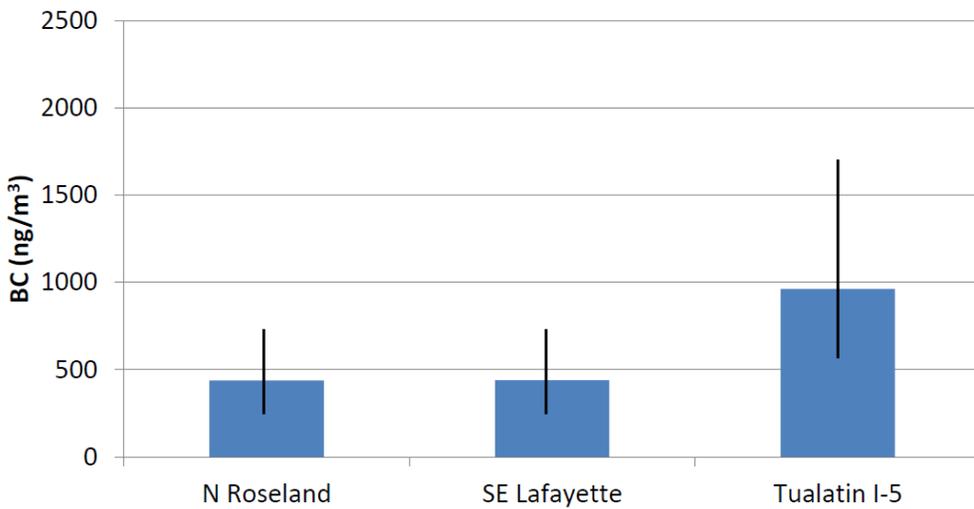


Figure 7. Plots of the median concentrations of Ultrafine Particles across the 9 AM – 4 PM school day. The height of the solid bars represents the median concentration. The ends of the whiskers represent the 25<sup>th</sup> and 75<sup>th</sup> percentiles. Concentration is expressed in counts per cubic centimeter (particles/cm<sup>3</sup>).

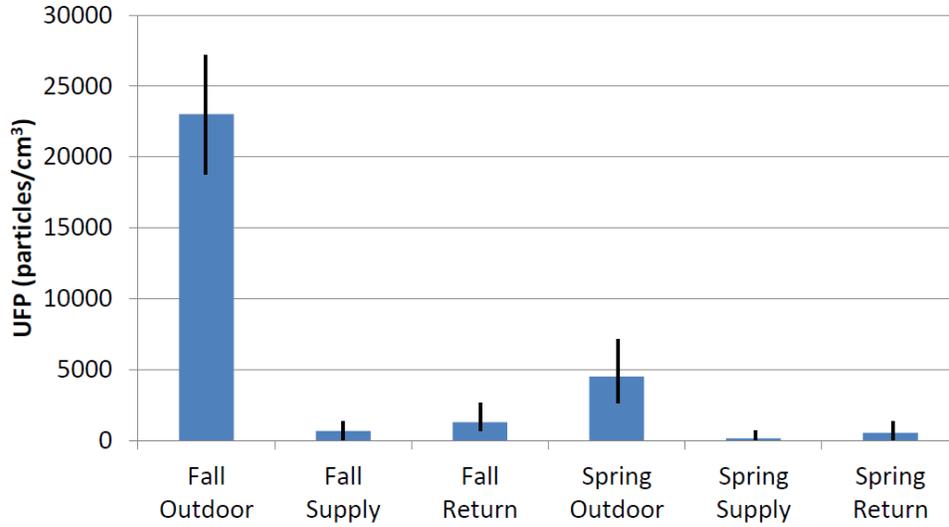


Figure 8. Plots of the median concentrations of Ultrafine Particles in outdoor areas surrounding HTMS in Spring 2019. The height of the solid bars represents the median concentration. The ends of the whiskers represent the 25<sup>th</sup> and 75<sup>th</sup> percentiles. Concentration is expressed in counts per cubic centimeter (particles/cm<sup>3</sup>).

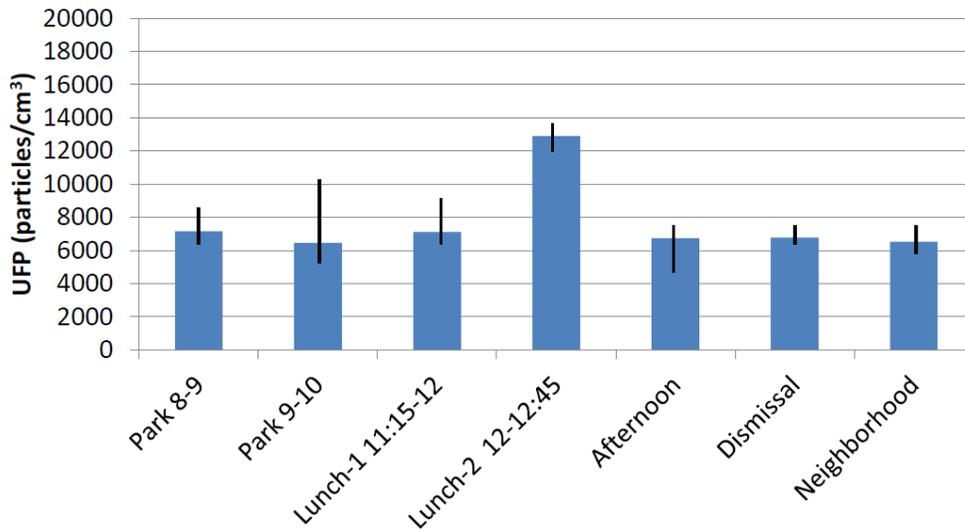


Figure 9. Plots of the median concentrations of the VOCs benzene and toluene in outdoor, supply, and return air locations of the HVAC system during Spring 2019. The height of the solid bars represents the median concentration. The ends of the whiskers represent the 25<sup>th</sup> and 75<sup>th</sup> percentiles. Concentration is expressed in micrograms per cubic meter ( $\mu\text{g}/\text{m}^3$ ).

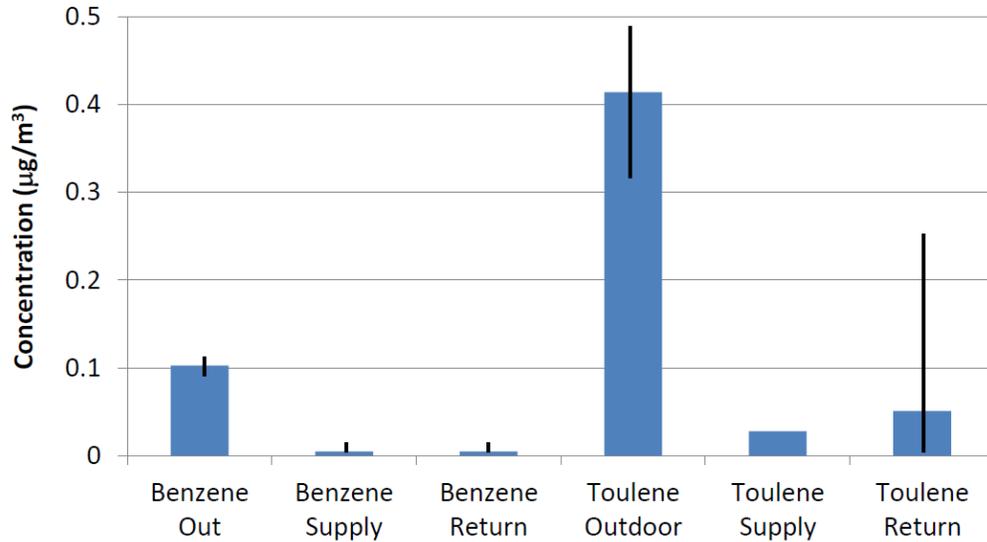


Figure 10. Plots of the median concentrations of the VOCs m-, p-Xylene and o-Xylene in outdoor, supply, and return air locations of the HVAC system during Spring 2019. The height of the solid bars represents the median concentration. The ends of the whiskers represent the 25<sup>th</sup> and 75<sup>th</sup> percentiles. Concentration is expressed in micrograms per cubic meter ( $\mu\text{g}/\text{m}^3$ ).

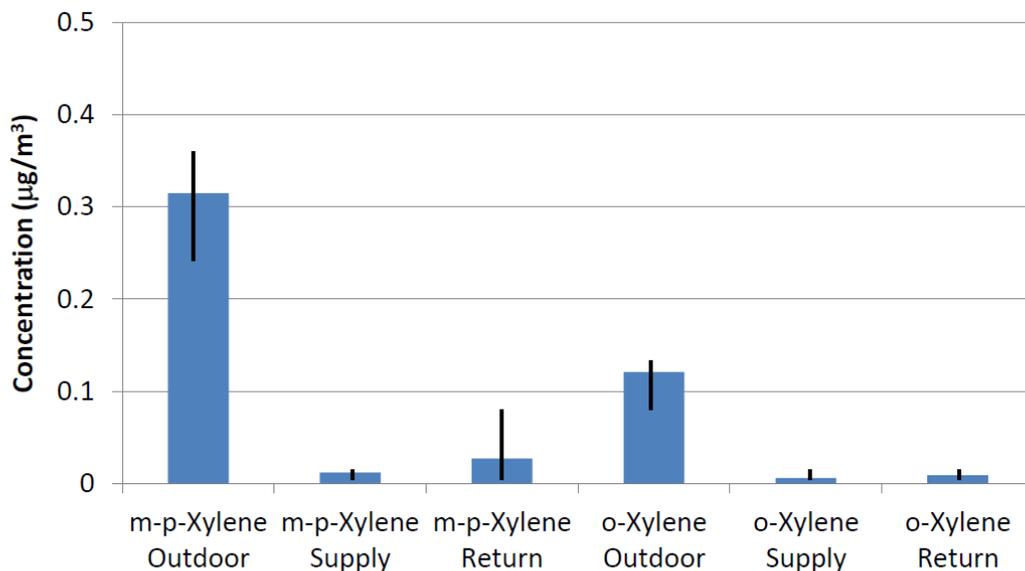
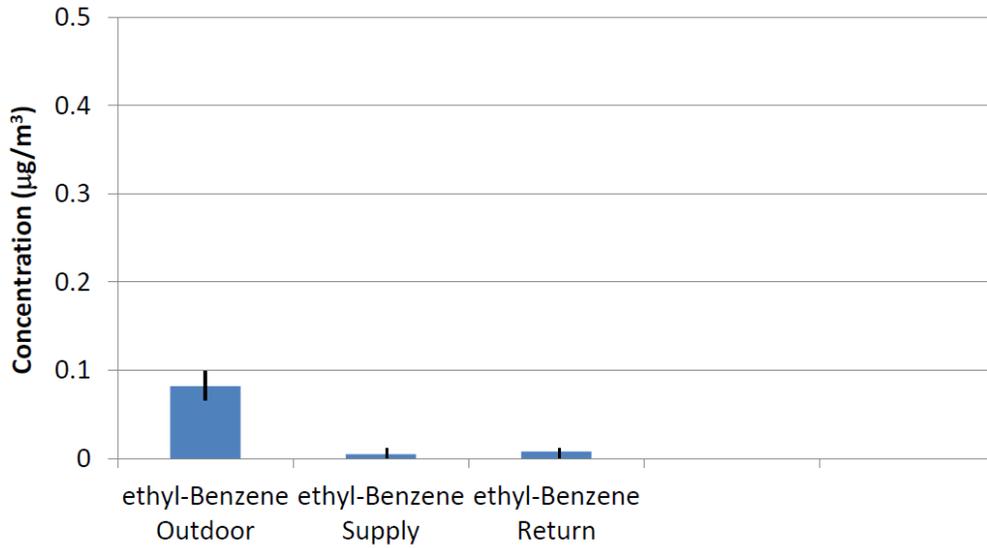


Figure 11. Plots of the median concentrations of the VOC ethylbenzene in outdoor, supply, and return air locations of the HVAC system during Spring 2019. The height of the solid bars represents the median concentration. The ends of the whiskers represent the 25<sup>th</sup> and 75<sup>th</sup> percentiles. Concentration is expressed in micrograms per cubic meter ( $\mu\text{g}/\text{m}^3$ ).



March 19, 2019

Other Matters Requiring Board Approval

Resolution Numbers 5856 through 5861

During the Committee of the Whole, Director Kohnstamm moved and Director Anthony seconded the motion to adopt amended Resolution 5856. The motion was put to a voice vote and passed unanimously (6-yes, 0-no), with Director Kohnstamm absent and Student Representative Paesler voting yes, unofficial.

Director Anthony moved and Director Bailey seconded the motion to amend Resolution 5856 by adding the following language to Recital G: "...lack of school bus egress from Harriet Tubman Middle School with the removal of the Flint Street overpass, ....". The motion was put to a voice vote and passed unanimously (7-yes, 0-no), with Student Representative Paesler voting yes, unofficial.

Director Kohnstamm moved and Director Anthony seconded the motion to amend Resolution 5856 by revising the language of Recital 3 as follows: "The Board agrees to busmit comments to ODOT during the Environmental Assessment public comment period."

During the Committee of the Whole, Director Anthony moved and Director Brim-Edwards seconded the motion to adopt Resolution 5857. The motion was put to a voice vote and passed unanimously (6-yes, 0-no), with Director Kohnstamm absent and Student Representative Paesler voting yes, unofficial.

Director Anthony moved and Director Bailey seconded the motion to amend Policy 6.50.010-P by replacing the word "avoid" with "mitigate" in the first sentence of paragraph I.5. The motion was put to a voice vote and failed (1-yes [Anthony], 5-no), with Director Kohnstamm absent and Student Representative Paesler voting no, unofficial.

Director Brim-Edwards moved and Director Anthony seconded the motion to amend Policy 6.50.010-P by adding the word "race" in the first sentence of paragraph I.5. The motion was put to a voice vote and passed unanimously (6-yes, 0-no), with Student Representative Paesler voting yes, unofficial.

Director Bailey moved and Director Brim-Edwards seconded the motion to amend Policy 6.50.010-P, paragraph I.3, to read as follows:

- 3) Schools and staff to submit field trip requests for review, and approval or denial, prior to any planned activities.
  - a. Principals shall have the authority to approve regular off-campus field trips, subject to Risk Management approval, occurring during the course of one school day.
  - b. All off-campus trips comprising more than one school day will be reviewed by Risk Management and approved by the supervising Area Assistant Superintendent.
  - c. Specific timelines, procedures, and requirements of this field trip approval process will be outlined in a related Administrative Directive.

During the Committee of the Whole, Director Kohnstamm moved and Director Anthony seconded the motion to adopt Resolutions 5859 through 5861 (Resolution 5858 withdrawn). The motion was put to a voice vote and passed unanimously (6-yes, 0-no), with Director Kohnstamm absent and Student Representative Paesler voting yes, unofficial.

March 19, 2019

**RESOLUTION No. 5856**

PPS Comments on the Environmental Assessment of the I-5 Broadway-Weidler Facility Plan

**RECITALS**

- A. In 2012, the Oregon Department of Transportation (ODOT) and the City of Portland Bureau of Planning and Sustainability and the Bureau of Transportation developed the I-5 Broadway-Weidler Facility Plan in conjunction with the City's N/NE Quadrant Plan. The N/NE Quadrant Plan set goals and actions for the land use and development in north and northeast Portland, while the Broadway-Weidler Facility Plan was intended to improve safety and operations on I-5 in the vicinity of the Broadway/Weidler interchange. Key elements of the facility plan include:
1. Adding auxiliary lanes and full-width shoulders (within existing right-of-way).
  2. Rebuilding structures at Broadway, Weidler, Vancouver and Williams and adding a lid over the freeway.
  3. Moving the I-5 southbound on-ramp to Weidler.
  4. Adding new connections over the freeway for pedestrian and bicycle travel in the interchange area.
- B. In 2012, the Portland City Council and the Oregon Transportation Commission approved the Broadway-Weidler Facility Plan. The proposed plan includes substantial widening of I-5 immediately adjacent to Harriet Tubman Middle School, including extending travel lanes closer to the school and constructing new retaining walls.
- C. In 2016, ODOT concluded the Broadway-Weidler Facility Plan improvements were technically feasible, and proceeded with development of an Environmental Assessment (EA). The EA is intended to evaluate the benefits and impacts within the Project Area of two alternatives: one in which the project would move forward as planned (Build Alternative), and one in which the project would not be built (No-Build Alternative).
- D. The National Environmental Policy Act (NEPA) requires federal agencies to assess the environmental effects of their proposed actions prior to making decisions. Based on the EA, the following actions can occur:
- a. If the agency determines that the action will not have significant environmental impacts, the agency will issue a Finding of No Significant Impact (FONSI). A FONSI is a document that presents the reasons why the agency has concluded that there are no significant environmental impacts projected to occur upon implementation of the action.
  - b. If the EA determines that the environmental impacts of a proposed action will be significant, an Environmental Impact Statement is prepared.
- E. ODOT's EA was published on February 15, 2019. The public comment period closes April 1, 2019. ODOT is required to take into consideration public health impacts in its analysis, and to use an equity lens in its planning processes. The historical legacy from ODOT ignoring health and equity concerns voiced decades ago about building a freeway to close to a school has cost PPS millions of dollars that were used to make the air inside Tubman safe for students.
- F. Although the proposed changes are immediately adjacent to PPS properties, in particular the Harriet Tubman Middle School, neither ODOT nor the City meaningfully engaged with PPS during the planning process to assess the potential impacts, either short-term or long-term, on the health

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of students and staff from environmental hazards or on the structural integrity of PPS facilities from incursions on PPS property during construction.

- G. An initial review of the EA by PPS staff has raised substantial questions about potential impacts on PPS properties, including risks to soil stability under the Harriet Tubman Middle School site during the construction process, increased air pollution, increased noise pollution, lack of school bus egress from Harriet Tubman Middle School with the removal of the Flint Street overpass, and shifts to traffic patterns in the vicinity of both Tubman and District headquarters.
- H. The materials that have been made publicly available to date, including the environmental assessments published only six weeks ago, provide insufficient evidence that the full scope of potential impacts from these projects has been adequately assessed.

### **RESOLUTION**

- 1. Due to the potential significant negative short-term and long-term impacts of the proposed project to PPS property, students, staff, and stakeholders, the Board of Education (Board) believes that ODOT cannot legitimately issue a Finding of No Significant Impact (FONSI). Additional study and input is necessary to understand the extent of the impacts and develop mitigation strategies.
- 2. Therefore, the Board finds that a full Environmental Impact Statement for the proposed project is warranted and necessary to determine the potential impacts of the proposed I-5 construction on PPS properties, PPS students and staff, and the larger community.
- 3. The Board agrees to submit comments to ODOT during the Environmental Assessment public comment period.

**December 03, 2019**

Consent Agenda

Resolution 6006 was tabled prior to the start of the meeting.

Resolution 6007 was tabled and will be brought back to the next meeting.

As a committee of the whole, Director Scott moved and Director Lowery seconded a motion to amend Resolution 6008 to replace the word “privately” under section K to “indicated that”. The motion was put to a voice vote and passed unanimously (7-yes, 0-no), with Student Representative Latterell voting yes.

As a committee of the whole, Director Scott moved and Director Brim-Edwards seconded a motion to adopt Resolution 6008. The motion was put to a voice vote and passed unanimously (7-yes, 0-no), with Student Representative Latterell voting yes.

Director Lowery moved and Director Scott seconded a motion to amend the final sentence of the second paragraph in Resolution 6009, under the Structure section, to read “One or two student members will be appointed to a one-year term through a process defined by the District Student Counsel.” The motion was put to a voice vote and passed unanimously (7-yes, 0-no), with Student Representative Latterell absent.

Director Lowery moved and Director Bailey seconded a motion to amend Resolution 6009 to add “Members are expected to attend committee meetings. Persistent lack of participation may result in the termination of a member’s Board appointment.” The motion was put to a voice vote and passed unanimously (7-yes, 0-no), with Student Representative Latterell absent.

Director DePass moved and Director Scott seconded a motion to adopt Resolution 6009. The motion was put to a voice vote and passed unanimously (7-yes, 0-no), with Student Representative Latterell absent.

December 03, 2019

**RESOLUTION No. 6008**

PPS Comments on Status of Oregon Department of Transportation's "I-5 Rose Quarter Improvement Project"

**RECITALS**

- A. In 2012, the Oregon Department of Transportation (ODOT) and the City of Portland Bureau of Planning and Sustainability and the Bureau of Transportation developed the I-5 Broadway-Weidler Facility Plan in conjunction with the City's N/NE Quadrant Plan. The N/NE Quadrant Plan set goals and actions for the land use and development in north and northeast Portland, while the Broadway-Weidler Facility Plan was intended to improve safety and operations on I-5 in the vicinity of the Broadway/Weidler interchange. Key elements of the facility plan include:
  - a. Adding auxiliary lanes and full-width shoulders (within existing right-of-way).
  - b. Rebuilding structures at Broadway, Weidler, Vancouver and Williams and adding a lid over the freeway.
  3. Moving the I-5 southbound on-ramp to Weidler.
  4. Adding new connections over the freeway for pedestrian and bicycle travel in the interchange area.
- B. In 2012, the Portland City Council and the Oregon Transportation Commission approved the Broadway-Weidler Facility Plan. The proposed plan includes substantial widening of I-5 immediately adjacent to Harriet Tubman Middle School, including extending travel lanes closer to the school and constructing new retaining walls.
- C. In 2016, ODOT concluded the Broadway-Weidler Facility Plan improvements were technically feasible, and proceeded with development of an Environmental Assessment (EA). The EA is intended to evaluate the benefits and impacts within the Project Area of two alternatives: one in which the project would move forward as planned (Build Alternative), and one in which the project would not be built (No-Build Alternative).
- D. The National Environmental Policy Act (NEPA) requires federal agencies to assess the environmental effects of their proposed actions prior to making decisions. Based on the EA, the following actions can occur:
  - a. If the agency determines that the action will not have significant environmental impacts, the agency will issue a Finding of No Significant Impact (FONSI). A FONSI is a document that presents the reasons why the agency has concluded that there are no significant environmental impacts projected to occur upon implementation of the action.
  - b. If the EA determines that the environmental impacts of a proposed action will be significant, an Environmental Impact Statement is prepared.
- E. ODOT's EA was published on February 15, 2019. The public comment period closed April 1, 2019. ODOT is required to take into consideration public health impacts in its analysis, and to use an equity lens in its planning processes. The historical legacy from ODOT ignoring health and equity concerns voiced decades ago about building a freeway too close to a school has cost PPS millions of dollars that were used to make the air inside Tubman safe for students and had health and environment consequences for our students and the surrounding community..

**December 03, 2019**

- F. Although the proposed project is immediately adjacent to PPS properties, in particular Harriet Tubman Middle School, neither ODOT nor the City meaningfully engaged with PPS during the planning process to assess the potential impacts, either short- or long-term, on the health of students and staff from environmental hazards of the freeway and the expansion or on the structural integrity of PPS facilities from incursions on PPS property during construction.
- G. An initial review of the EA by PPS staff raised substantial questions about potential impacts on PPS properties, including risks to soil stability under the Harriet Tubman Middle School site during the construction process, increased air pollution, increased noise pollution, lack of school bus egress from Harriet Tubman Middle School with the removal of the Flint Street overpass, and shifts to traffic patterns in the vicinity of both Tubman and District headquarters.
- H. In March 2019, the PPS Board of Education passed a resolution urging ODOT to move forward with a full Environment Impact Statement (EIS) to fully resolve questions around the potential impacts of the I-5 freeway and the proposed expansion on our students.
- I. In June 2019, ODOT convened a group of elected leaders and staff as well as community stakeholders to discuss the I-5 Rose Quarter Improvement Project in the Albina neighborhood.
- J. To date, this group has met five times and made no substantial progress to substantially address issues raised by Portland Public Schools and the Albina Vision or offer alternatives to the current project plan.
- K. At this time, the OTC has indicated that it plans to unilaterally take action at its December 17 public meeting without addressing any of the troubling and significant impacts that the widening will have on students and community health.
- L. Per Board Resolution 5272, the Board is committed to addressing issues of climate justice that affect our students.

### **RESOLUTION**

- The Board of Education for Portland Public Schools opposes ODOT's efforts to move ahead with the Interstate 5 North of the Rose Quarter expansion in Albina without conducting a full Environmental Impact Statement (EIS) and addressing the long term health and environmental issues at Harriet Tubman Middle School caused by the I-5 freeway.
- The Board of Education for Portland Public Schools will work in partnership with Albina Vision Trust to understand the environmental and health impacts of the freeway for students in the Albina neighborhood and develop initiatives that mitigate the freeway's impact on students and their families in this neighborhood.
- The Board will work with the community to share information about the impacts of this freeway and the expansion with the legislature's Joint Committee on Transportation and other legislative leaders so that they understand the potential impacts of this project to Portland Public Schools' students and the wider Albina community.

## RESOLUTION No. 6354

### Protecting PPS Students, Staff, and Communities in Oregon Department of Transportation's I-5 Rose Quarter Project

#### RECITALS

- A. In 2012, the Oregon Department of Transportation (ODOT) and the City of Portland Bureau of Planning and Sustainability and the Bureau of Transportation developed the I-5 Broadway-Weidler Facility Plan in conjunction with the City's N/NE Quadrant Plan. The N/NE Quadrant Plan set goals and actions for the land use and development in north and northeast Portland, while the Broadway-Weidler Facility Plan was intended to improve safety and operations on I-5 in the vicinity of the Broadway/Weidler interchange. Key elements of the facility plan include:
  - a. Adding auxiliary lanes and full-width shoulders (within existing right-of-way).
  - b. Rebuilding structures at Broadway, Weidler, Vancouver and Williams and adding a lid over the freeway.
  - c. Moving the I-5 southbound on-ramp to Weidler.
  - d. Adding new connections over the freeway for pedestrian and bicycle travel in the interchange area.
- B. In 2012, the Portland City Council and the Oregon Transportation Commission approved the Broadway-Weidler Facility Plan. The proposed plan includes substantial widening of I-5 immediately adjacent to Harriet Tubman Middle School, including extending travel lanes closer to the school and constructing new retaining walls.
- C. In 2016, ODOT concluded the Broadway-Weidler Facility Plan improvements were technically feasible and proceeded with development of an Environmental Assessment (EA). The EA is intended to evaluate the benefits and impacts within the project area of two alternatives: one in which the project would move forward as planned (Build Alternative), and one in which the project would not be built (No-Build Alternative).
- D. The National Environmental Policy Act (NEPA) requires federal agencies to assess the environmental effects of their proposed actions prior to making decisions. Based on the EA, the following actions can occur:
  - a. If the agency determines that the action will not have significant environmental impacts, the agency will issue a Finding of No Significant Impact (FONSI). A FONSI is a document that presents the reasons why the agency has concluded that there are no significant environmental impacts projected to occur upon implementation of the action.
  - b. If the EA determines that the environmental impacts of a proposed action will be significant, an Environmental Impact Statement is prepared.
- E. ODOT's EA was published on February 15, 2019. The public comment period closed April 1, 2019. ODOT is required to take into consideration public health impacts in its analysis and to use an equity lens in its planning processes. The historical legacy from ODOT ignoring health and equity concerns voiced decades ago about building a freeway too close to a school has had health and environment consequences for our students and the surrounding community and required PPS to spend millions in limited capital funds to make the air inside Tubman safe for students.
- F. Although the proposed project is immediately adjacent to PPS properties, in particular Harriet Tubman Middle School, neither ODOT nor the City meaningfully engaged with PPS or our families during the planning process to assess the potential impacts, either short- or long-term, on the health of students and staff from environmental hazards of the freeway and the expansion or

on the structural integrity of PPS facilities from incursions on PPS property during construction.

- G. I-5 is already built hazardously close to Harriet Tubman Middle School (HTMS) and has negative impacts on the air quality for students and staff. PPS spent more than \$10M to install air filtration systems when the school reopened in 2018 to mitigate the impacts of traffic on I-5.
- H. An initial review of the EA by PPS staff raised substantial questions about potential impacts on PPS properties, including risks to soil stability under the Harriet Tubman Middle School site during the construction process, increased air pollution, increased noise pollution, lack of school bus egress from Harriet Tubman Middle School with the removal of the Flint Street overpass, and shifts to traffic patterns in the vicinity of both Tubman and District headquarters.
- I. In March 2019 and again in December 2019, the PPS Board of Education passed resolutions 5856 and 6008 urging ODOT to move forward with a full Environmental Impact Statement (EIS) to fully resolve questions around the potential impacts of the I-5 freeway and the proposed expansion on our students.
- J. Representatives of Portland Public Schools and the Board of Education have continued raising concerns about potential air-quality impacts to Harriet Tubman Middle School students and the surrounding neighborhood and to support economic empowerment in the Albina neighborhood by investing in highway covers to enable redevelopment and reinvestment and improve neighborhood connectivity.
- K. To date, none of the concerns raised by Portland Public Schools has been addressed by ODOT; and in fact, at an Executive Steering Committee meeting in fall 2020, ODOT representatives opposed language that would require the project to result in air quality at Harriet Tubman Middle School that is safe for youth.
- L. In late spring 2021, Portland Public Schools conducted community outreach to Harriet Tubman Middle School families, as well as its feeder schools: Boise-Eliot, Irvington, Sabin and Dr. Martin Luther King Jr.
- M. An online survey was open from June 3-June 21, 2021, and the District also conducted a focus group. In general, the feedback from the community can be summarized under three themes: air quality for students, broader engagement, and relocation of HTMS. Given COVID-19 gathering restrictions and summer schedules, community engagement will be ongoing.
- N. The feedback regarding air quality included requests for improved indoor ventilation systems, identification of long-term impacts on students, and installation of highway covers.
- O. State and regional leaders have shared their concern for the negative impact the original freeway placement has had and that the freeway expansion will have on HTMS students and the community.
- P. On June 11, 2020, the PPS Board of Education unanimously approved Resolution 6130. In this resolution, the Board declared that the lives of Black students and our Black community matter and committed to working with the Superintendent and the Portland community to create the conditions for every student, especially our Black and Native students who experience the greatest challenges, to realize the vision of the Graduate Portrait.
- Q. The work of the Albina Vision Trust and the Black community in Portland to reclaim the Albina community is similar to the push for equitable access to public education, especially for our Black students and their families. This push has long been a key component of the civil rights movement and fight for racial justice and builds on the legacy of advocacy for Black children in Portland, and catalyzed by the social movements for Black Lives. Government Institutions like ODOT and PPS, have a moment, an opportunity to lead, not with race-neutral plans, but with an

anti-racist agenda that amplifies an intergenerational healing process among students, their families, and our community.

- R. Portland Public Schools appreciates that the State and other partners are working with PPS to find a solution to address the ongoing concerns about the air quality and construction disruption at Harriet Tubman Middle School.

### **RESOLUTION**

- A. The Board of Education for Portland Public Schools will work in partnership with Albina Vision Trust, state and community leaders to understand the environmental and health impacts of the freeway for students in the Albina neighborhood and advocate for initiatives that mitigate the freeway's impact on students and their families in this neighborhood.
- B. The Board of Education for Portland Public Schools supports and urges federal investments to reconnect, revitalize and transform the Albina community to address the many harms caused by the original construction of the Interstate freeway and ensure a seamless, aligned project that addresses displacement, economic, and environmental racism, while supporting educational innovation and new economic opportunities for the community.
- C. If ODOT and the State proceed with the project that will compound the original negative health and environmental impacts on the students and neighboring community, the Board of Education and Superintendent for Portland Public Schools calls on state leaders and the project team to accept the responsibility for the harm they have caused and to mitigate the past and potential future harm to the health of students and staff at Harriet Tubman Middle School.
- D. Further, Portland Public Schools leadership demands that if the State moves ahead with the project that it commits to create a transformative infrastructure project for Historic Albina and to secure the funds to rebuild Harriet Tubman Middle School in a safe, healthy location in Historic Albina.

# APPENDIX C

## SUPPORTING DOCUMENTS

- » Mahlum Architecture: BESC & Meek Site Studies
- » Bora Architecture & Interiors: Jefferson HS and Humboldt Site Studies Report
- » Bora Architecture & Interiors: Report Appendix

# BESC: Updated Study

Showing PPS Middle School "Maximum" program

This urban approach could be developed in light of Central City Plan and Albina Vision Trust.

The site has been divided into three large blocks that mimic the historic city blocks and provide connectivity between Dixon and Hancock Streets. In order to provide safe pedestrian connectivity, diagram suggests an 'woonerf' between the building block and the field block.

Softball field shown on center block has a 180-foot fence line; this could be adjusted as detailed design for the woonerf is considered.

## Site Requirements (from PPS Ed Spec)

- Provide on-site vehicle and covered bicycle parking for personnel and students per city code requirement
- Provide (1) Softball Field 180-ft fence line shown
- Provide (1) Soccer Field (can overlay the Softball Field) U-12 field
- Play Equipment Area for 6th to 8th Grade
- Hardsurface Play Area for 6th to 8th Grade
- Separate Bus Drop-off Area
- Parking area for school personnel and visitors per the City of Portland Zoning Code shows min: 33 spaces
- Separate staff and visitors parking if possible potential on center lot
- Play/Practice for baseball, soccer and running trail potential on center lot

# BESC: Updated Study



SITE PLAN



VIEW FROM NE



VIEW FROM SW



# BESC

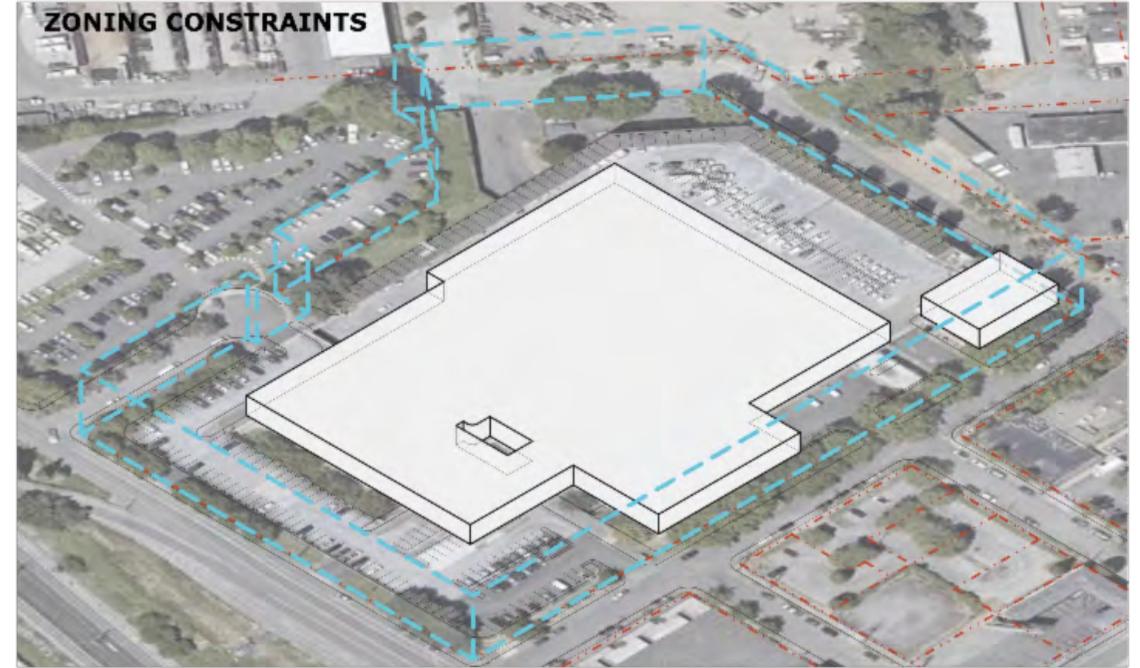
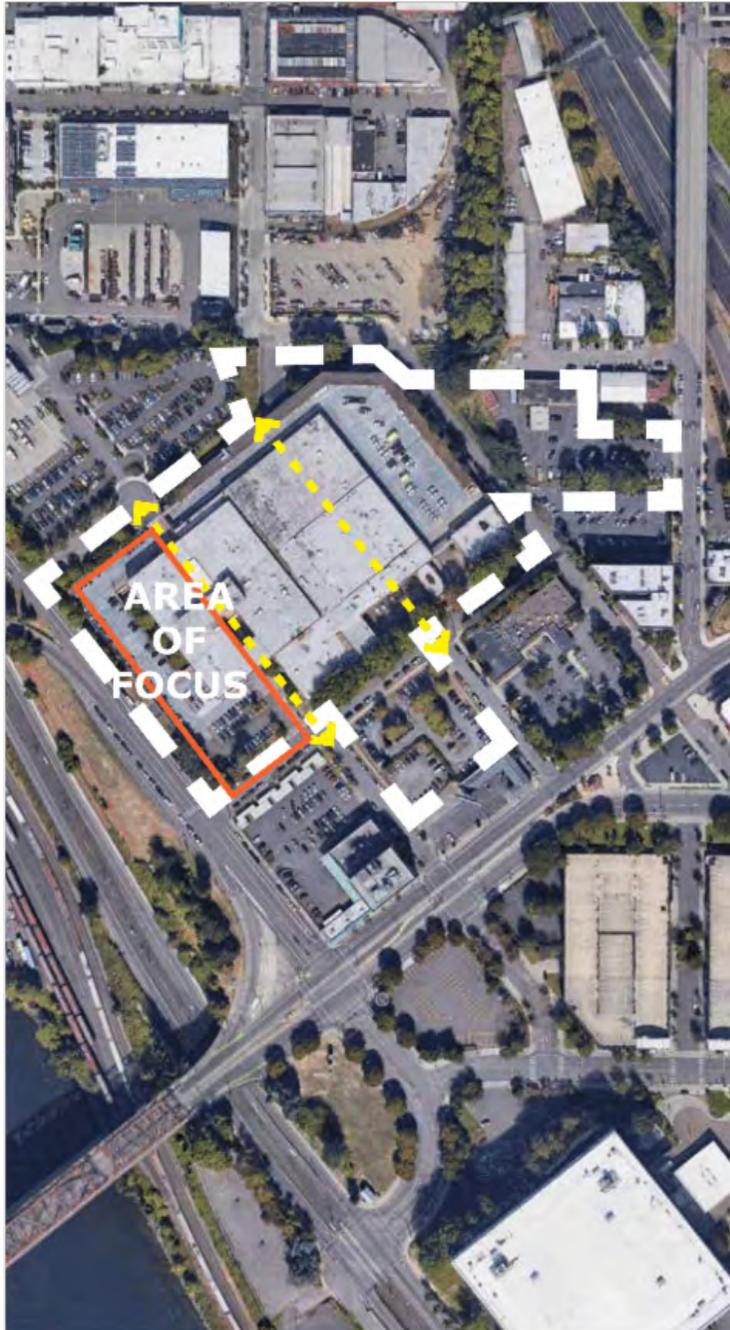
**ADDRESS**  
501 N. DIXON ST

**CONSTRUCTION DATE**  
1979

**CURRENT OWNER**  
PORTLAND PUBLIC SCHOOLS

**SITE AREA**  
10.15 ACRES

**ZONING**  
EX - CENTRAL EMPLOYMENT



# BESC: Allowed Uses

A School is an allowed use in the EX zone.

Title 33, Planning and Zoning  
3/1/22

Chapter 33.140  
Employment and Industrial Zones

<b>Table 140-1 Employment and Industrial Zone Primary Uses</b>						
<b>Use Categories</b>	<b>EG1</b>	<b>EG2</b>	<b>EX</b>	<b>IG1</b>	<b>IG2</b>	<b>IH</b>
<b>Institutional Categories</b>						
Basic Utilities	Y/CU [10]	Y/CU [10]	Y/CU [10]	Y/CU [11]	Y/CU [12]	Y/CU [11]
Community Service	L/CU [8]	L/CU [8]	L/CU [8]	L/CU [9]	L/CU [9]	L/CU [9]
Parks And Open Areas	Y	Y	Y	Y	Y	Y
Schools	Y	Y	Y	N	N	N
Colleges	Y	Y	Y	N	N	N
Medical Centers	Y	Y	Y	N	N	N
Religious Institutions	Y	Y	Y	N	N	N
Daycare	Y	Y	Y	L/CU [9]	L/CU [9]	L/CU [9]
<b>Other Categories</b>						
Agriculture	L [14]	L [14]	L [14]	L [14]	L [14]	L [14]
Aviation And Surface Passenger Terminals	CU	CU	CU	CU	CU	CU
Detention Facilities	CU	CU	CU	CU	CU	CU
Mining	N	N	N	CU	CU	CU
Radio Frequency Transmission Facilities	L/CU [12]	L/CU [12]	L/CU [12]	L/CU [12]	L/CU [12]	L/CU [12]
Rail Lines And Utility Corridors	Y	Y	Y	Y	Y	Y

Y = Yes, Allowed

CU = Conditional Use Review Required

L = Allowed, But Special Limitations

N = No, Prohibited

# BESC: Baseline Zoning Info: 501 N Dixon Street

	Zoning Requirement:	Calculation for entire site:	Calculation for approx proposed area of site:
<b>ZONE</b>	EXd - Central Employment*		
<b>Site Area</b>	10.15 acres (main site)	442,134 sf	5.6 acres / 243,936 sf
<b>Overlays</b>	<b>d</b> = Design Overlay; must comply with Central City Plan		
<b>School Use</b>	Allowed outright (table 140-1)		
<b>FAR (Floor Area Ratio)</b>	3:1**	Allowable Building area: <b>1,326,403</b> sf (based on FAR)	Allowable Building area: <b>731,808</b> sf (based on FAR)
<b>Maximum building coverage</b>	100%	Allowed coverage: 442,134sf	Allowed coverage: 243,936 sf
<b>Height Limit</b>	65-feet to 80-feet, with small area to 150-feet; see page on height for add'l info		
<b>Setbacks</b>	0-foot minimum; 10-foot setback on Interstate Avenue (Traffic Access Street)	See 33.140.240 for Pedestrian Standards	
<b>Parking</b>	No minimum; Maximum 1 per classroom (table 266-2)***	33 parking spaces (maximum)	same



\*Developments in the EX zone which are on land that includes vacated rights-of-way may be subject to the superblock standards of Chapter 33.293, Superblocks. [This section exempts public schools.](#)

\*\*If a school is built as part of a "Neighborhood facility," it does not count towards FAR for the site (33.510.200.E)

\*\*\*Exception: Up to 100 parking spaces may be on a surface parking lot or in structured parking with no gross building area above it if the parking is for a public school use (33.510.261.I.3.b). Does this change 1 spot per classroom limit?

Note: Interstate Avenue/Larrabee Street is classified in the Central City 2035 Plan as: Major City Access Street, Major Emergency Response Route, Major Truck Street, Major City Bikeway

# BESC: City of Portland Zoning Overlays

401 WI/ N DIXON ST

PORTLAND, OR 97227

## ZONING & DISTRICTS

### Zoning

Base	EX - Central Employment
Overlay	d - Design
Base Overlay Combination	EXd
Comp Plan	EX - Central Employment
Comp Plan Overlay	n/a
Historic District	n/a
Conservation District	n/a
National Register District	n/a
Plan District	CC - Central City Lloyd
Natural Resource Management District	n/a
Quarter Section(s)	2829 2830
Major Public Trail Designation	No

[View Detailed Zoning Map](#)

### Historic Resource

n/a

### Urban Renewal Area

Property Eligible District: Yes  
Interstate Corridor

### Business District(s)

n/a

## Design (d)

The Design (**d**) overlay zone ensures that Portland is both a city designed for people and a city in harmony with nature. The Design overlay zone supports the city's evolution within current and emerging centers of civic life. The overlay promotes design excellence in the built environment through the application of additional design standards and design guidelines that:

- Build on context by enhancing the distinctive physical, natural, historic and cultural qualities of the location while accommodating growth and change;
- Contribute to a public realm that encourages social interaction and fosters inclusivity in people's daily experience; and
- Promotes quality and long-term resilience in the face of changing demographics, climate and economy.

For specific zoning code details, visit the [zoning code website](#). The regulations for this zone are found in [Chapter 33.420](#).

## Central City Plan District(CC)

The Central City (**CC**) plan district implements the Central City Plan and other plans applicable to the Central City area. These other plans include the Downtown Plan, the River District Plan, the University District Plan, and the Central City Transportation Management Plan. The Central City plan district implements portions of these plans by adding code provisions which address special circumstances existing in the Central City area.

For specific zoning code details, visit the [zoning code website](#). The regulations for this plan district are found in [Chapter 33.510](#).

<https://www.portlandmaps.com/bps/zoning/#/zones/overlay/d>

the design overlay is superseded by the Central City Plan requirements

<https://www.portlandmaps.com/bps/zoning/#/zones/plan/district/CC>

## Central Employment (EX)



The **EX** zone allows a full range of high density commercial, light industrial, institutional and residential uses. This zone is intended for sites in or near the Central City and In Gateway.

For specific zoning code details, visit the [zoning code website](#). The regulations for this zone are found in [Chapter 33.140](#).

Generally, the uses and character of this zone are oriented towards:



RETAIL



OFFICE



RESIDENTIAL



INDUSTRY



HIGHER EDUCATION



COMMUNITY SERVICES

Specific allowable uses include: manufacturing, warehouse, wholesale sales, industrial services, residential, parks and open spaces, educational institutions, hospitals and quick vehicle servicing.

### Quick facts

**Location** EX Zones are located predominantly in or near the Central City and In Gateway.

**65+** **maximum height**, which is generally 6 stories.

**FAR Range** FAR in the EX zone ranges from **3:1 - 9:1**

Height and FAR varies per plan district maps. Generally, buildings in EX zones are at least 65' and can reach up to 225' in some places.

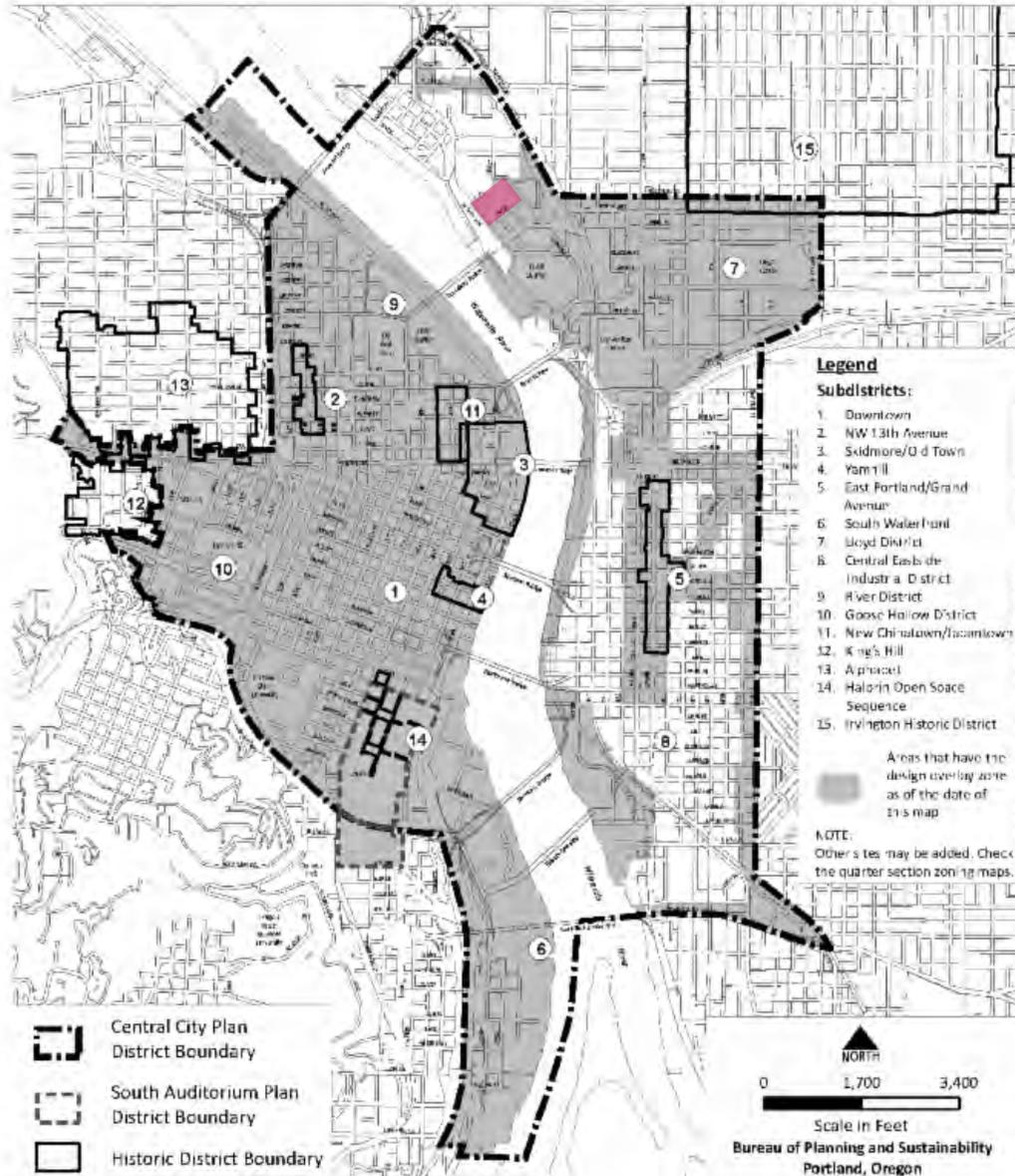
**Parking** is generally not required for non-residential uses when development is located near transit or contains fewer than 30 residential units.

<https://www.portlandmaps.com/bps/zoning/#/zones/base/EX>

# Design Districts and Subdistricts in the Central City and South Auditorium Plan Districts

## Map 420-1

Map Revised August 10, 2020



Lloyd Subdistrict (Map 510-1)



The design overlay is superseded by the Central City Plan requirements.

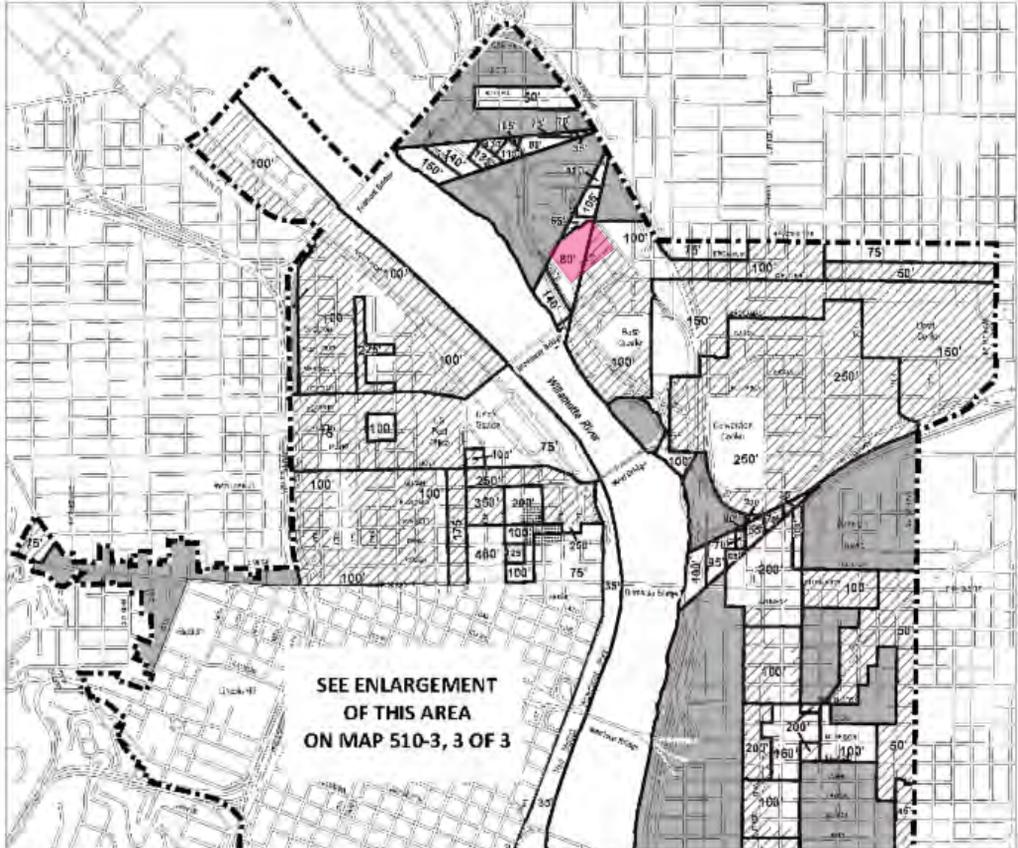
# BESC: Height Limit

## Base Heights

## Map 510-3

Map 1 of 3

Map Revised August 10, 2020



### Legend

Central City Plan District boundary

Base building height

Areas where height is determined by base zone

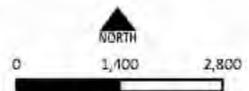
Proposed right-of-way

Proposed accessways

Area eligible for height increase

Base height limit of 75' for first 125 feet from top of bank

Areas where a shadow analysis is required



Bureau of Planning and Sustainability  
Portland, Oregon

# BESC: Height Limit

## Map 510-4

Map 1 of 3

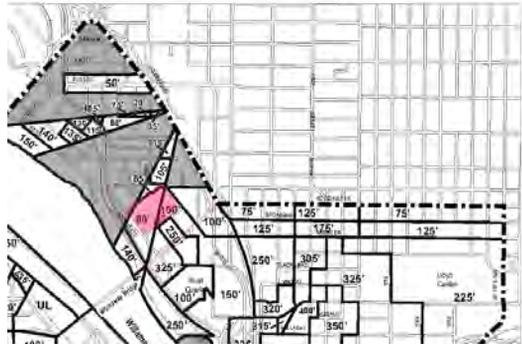
Map Revised August 10, 2020

### Height allowances:

Site has 65-foot and 80-foot limits as part of base zone.

SE corner is eligible for height increase up to 150' (map 510-4)

School needs ~65' total height.



### Site Topography:

Site slopes downward ~20' from SE to NW.

Lowest point is ~81' above sea level (NW corner)

Highest point is ~100' above sea level (SE corner)

Existing building is partially buried:

#### FINISH FLOOR ELEVATIONS

LEVEL 1	71'-0"
LEVEL 2	83'-0"
LEVEL 3	96'-0"
LEVEL 4	110'-0"

Precise definition of height will need to be determined by final lot lines;

Based on concept of placing school on western third of site, the base reference point would be taken from the highest grade of the adjacent sidewalk, approx 91' above sea level. (33.930.050.1.a.(1))

### Code Notes:

Exceptions for chimneys, flag poles, rooftop mechanical (10-16', setback), parapets (4'), solar (5'). (33.140.210.B)

# Required Central City Master Plan Areas

# Map 510-19

Map 1 of 2

Map Revised August 10, 2020



## Legend

-  Central City Plan District boundary
-  Required Central City Master Plan areas
-  Proposed right-of-way
-  Proposed accessway



Scale in Feet  
Bureau of Planning and Sustainability  
Portland, Oregon



Broomberg  
 Orthographic  
 C. Toole  
 Rudolf &  
 Associates,  
 P.C.  
 100 UNIVERSITY  
 PARKWAY, SUITE 100  
 PORTLAND, OREGON 97207



**EDUCATIONAL SERVICE CENTER  
 PORTLAND PUBLIC SCHOOLS**  
 School District No. One, Multnomah County / 631 NE Clackamas Street, Portland, Oregon 97232

SITE PLAN -  
 SURVEY / B.D.G.  
 11-20-08

# BESC: Master Plan Requirements (summary)

## Central City Plan District Requirements (33.510):

- Required for this site, even as a school use (>40,000sf)
- Type III review + Design Advice Request
- Must include all contiguous lots owned by PPS (including lots shared across right-of-way).
- Must show existing & proposed internal circulation (pedestrian, bicycle and vehicle) and rights-of-way.
- Must be "consistent with applicable subdistrict goals and policies of the Central City 2035 Plan" and demonstrate how it will comply with Central City Fundamental Design Guidelines.

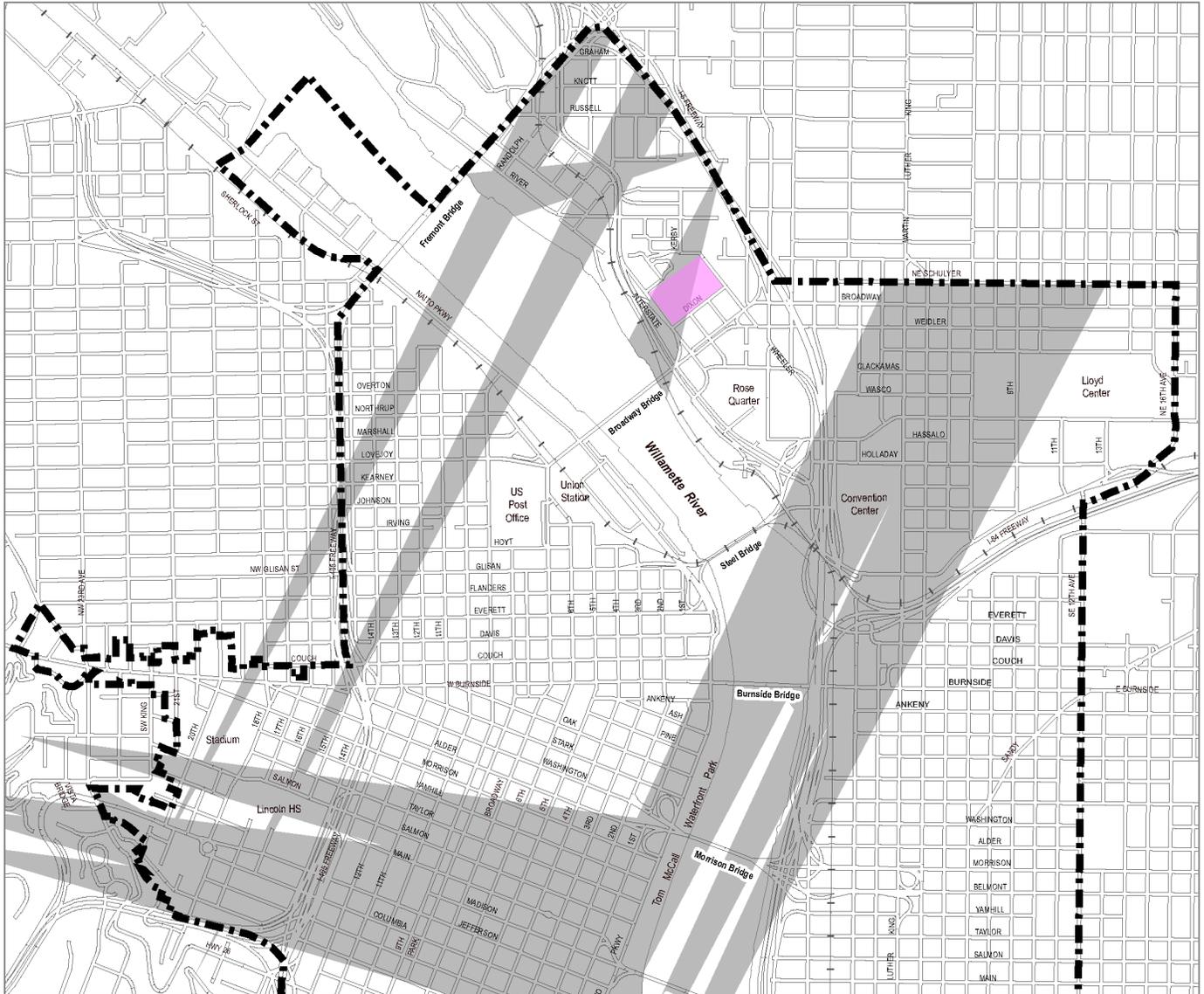
<https://www.portland.gov/bps/planning/cc2035/cc2035-documents>

# View Corridor Areas

# Map 510-20

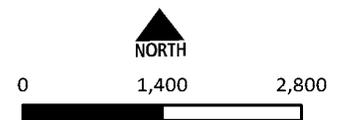
Map 1 of 2

Map Revised August 10, 2020



## Legend

-  Central City Plan District boundary
-  Areas within Scenic View Corridors
-  Proposed right-of-way
-  Proposed accessway



Scale in Feet

Bureau of Planning and Sustainability  
Portland, Oregon

# Themes from Central City 2035 Plan

- Builds from 2012 N/NE Quadrant Plan
- Maintain view from Lillis Albina Park (CCN04)
- Scrutiny along N Larrabee from N Dixon to N Hancock (CCN07), ultimately allows conflicting uses w/ structure and vegetation.
- Locate formal viewing area of Willamette River (RC42)
- Interest in serving Blanchard site with district energy (EN26)
- Interest in adding light rail station near Dixon (TR71)
- Potential tie-in to "Green Loop"
- Desire for Open Space / Park at site (2012 N/NE Quadrant plan)
- Make Dixon Street a "flexible" connector street across I-5; cover freeway east of site (2012 N/NE Quadrant plan)



## CCN04: LILLIS ALBINA PARK – SOUTH SIDE BY PARKING

**Site-Specific ESEE Decision:** The ESEE decision is to:

1. *Prohibit* conflicting structures and vegetation within the view corridor to the Downtown skyline and West Hills.

**Protected focal feature(s) of the view:** Downtown skyline, West Hills

**Explanation:** This view from Albina Park includes a view of the Downtown skyline, including the U.S. Bancorp Tower, and the West Hills. The Broadway Bridge and Union Station are secondary focal features. There is a utility pole and a fence in the foreground that are slightly discordant but don't block any primary features of the view itself. The view is from the lawn of the park, under a tree, though there is not a developed viewpoint. The view from CCN04 is ranked Tier II.



The general ESEE recommendation for a Tier II view without a view of Mt Hood or Mt St Helens is to allow conflicting height and limit conflicting vegetation within view corridors to primary focal features. The primary focal features from CCN04 are the Downtown skyline and West Hills so the general ESEE decision would be to allow conflicting height and limit conflicting vegetation. However, this view is unique to the neighborhood. There are very few viewpoints located in or near Lower Albina. Much of the area within the view cone is zoned industrial so is unlikely to be built up beyond a few stories. The view cone crosses over roughly half of a Portland Public School building known as the Blanchard site. The Blanchard site is an underutilized site identified in the BLI and is likely to redevelop within the next 20 years. CCN04 is a historic view (from the 1991 SRPP) and there is currently a 50' height limit associated with this view corridor. The ESEE decision is to prohibit conflicting structures and vegetation within the view corridor to the Downtown skyline with the West Hills in the background (shown in red)

and limit the vegetation to produce air space around the view (shown in yellow).



## CCN07: N LARRABEE AVENUE BETWEEN N DIXON AND N HANCOCK STREETS

**Site-Specific ESEE Decision:** The ESEE decision is to:

1. Allow conflicting structures and vegetation.

**Protected focal feature(s) of the view:** N/A

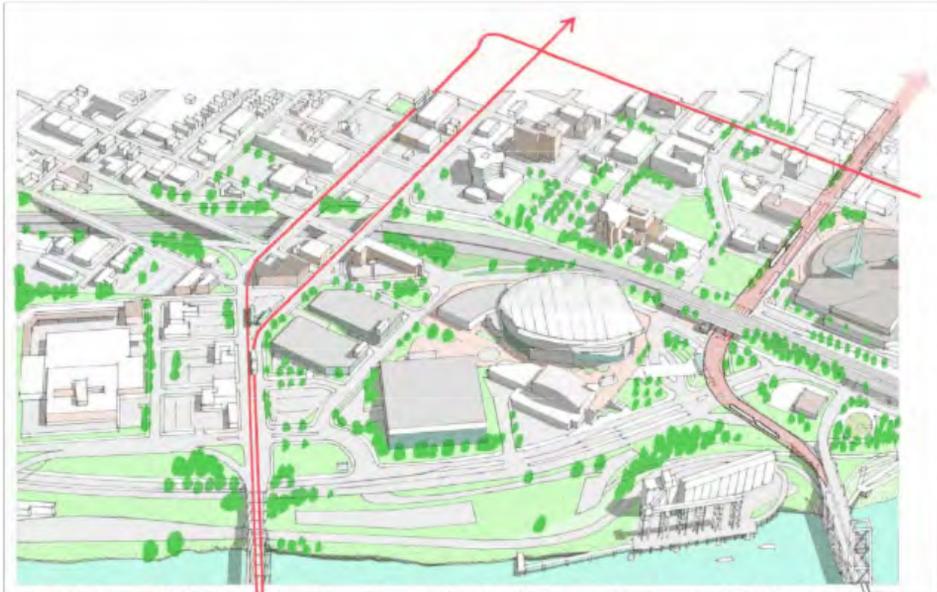
**Explanation:** The Willamette River, Broadway Bridge, Pearl District waterfront, West Hills, and grain mill are the primary focal elements of this view. The U.S. Bancorp Tower, Forest Park, and a section of the Fremont Bridge are also visible. This viewpoint is located in its historic location on the west side of N Larrabee Avenue; however, there is not a sidewalk on the west side of N Larrabee Avenue and the closest crosswalk is one block south, at N Larrabee Avenue and N Broadway Street. The view from CCN07 is ranked Group B.



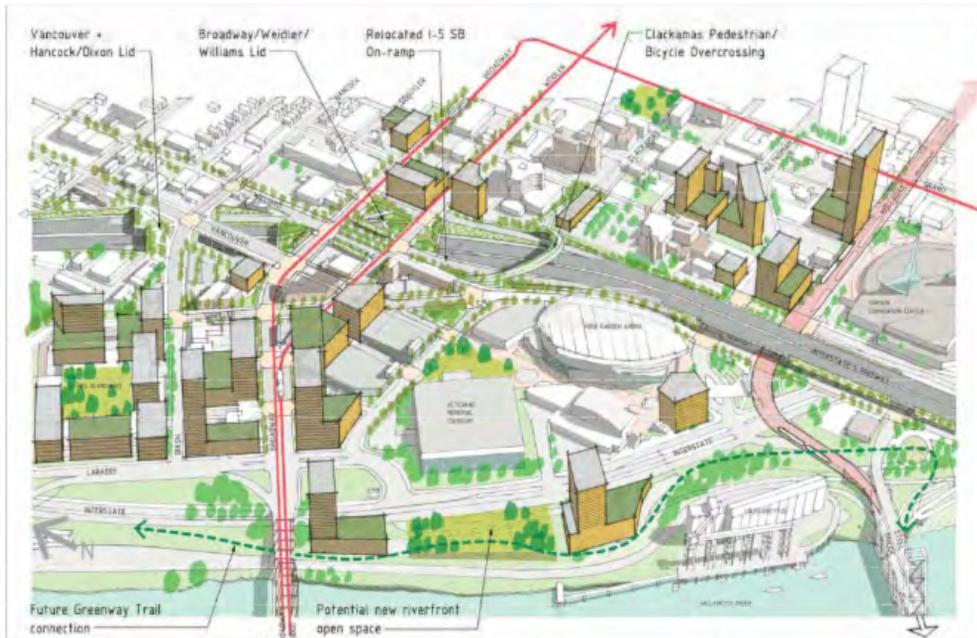
The general ESEE recommendation for a Group B view without Mt Hood or Mt St Helens as a primary focal feature is to allow conflicting structures and limit conflicting vegetation within view corridors to primary focal features. This previously protected view is compromised by development along the river and the viewpoint is not located in a frequently visited location nor is it easily accessible. There is currently a 25' height restriction associated with this view corridor; however, there are less obstructed views of the Broadway Bridge, Willamette River, West Hills, and Pearl District waterfront from the Greenway Trail and the Broadway Bridge itself that don't require limitation on building heights. After weighing the economic, social, environmental and energy costs of limited conflicting uses, the ESEE decision is to allow all conflicting uses.



Chapter 2: Developing the Plan



Rendering showing existing conditions at the Broadway/Weidler Interchange.

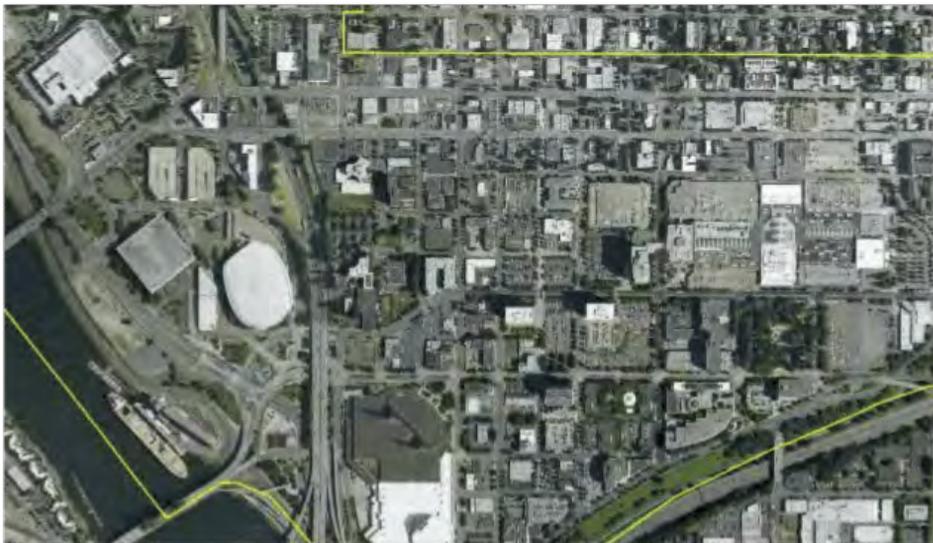


Conceptual rendering showing the recommended concept for improvements to the Broadway/Weidler Interchange and potential new development in the Lloyd District.

Appendix D: N/NE Quadrant History



Lloyd District, 1950



Lloyd District, 2009

FULL VISION: 2041-2050



June 2022: "City commissioners unofficially gave their support to the plan for redeveloping the Lower Albina neighborhood. Albina Vision Trust"

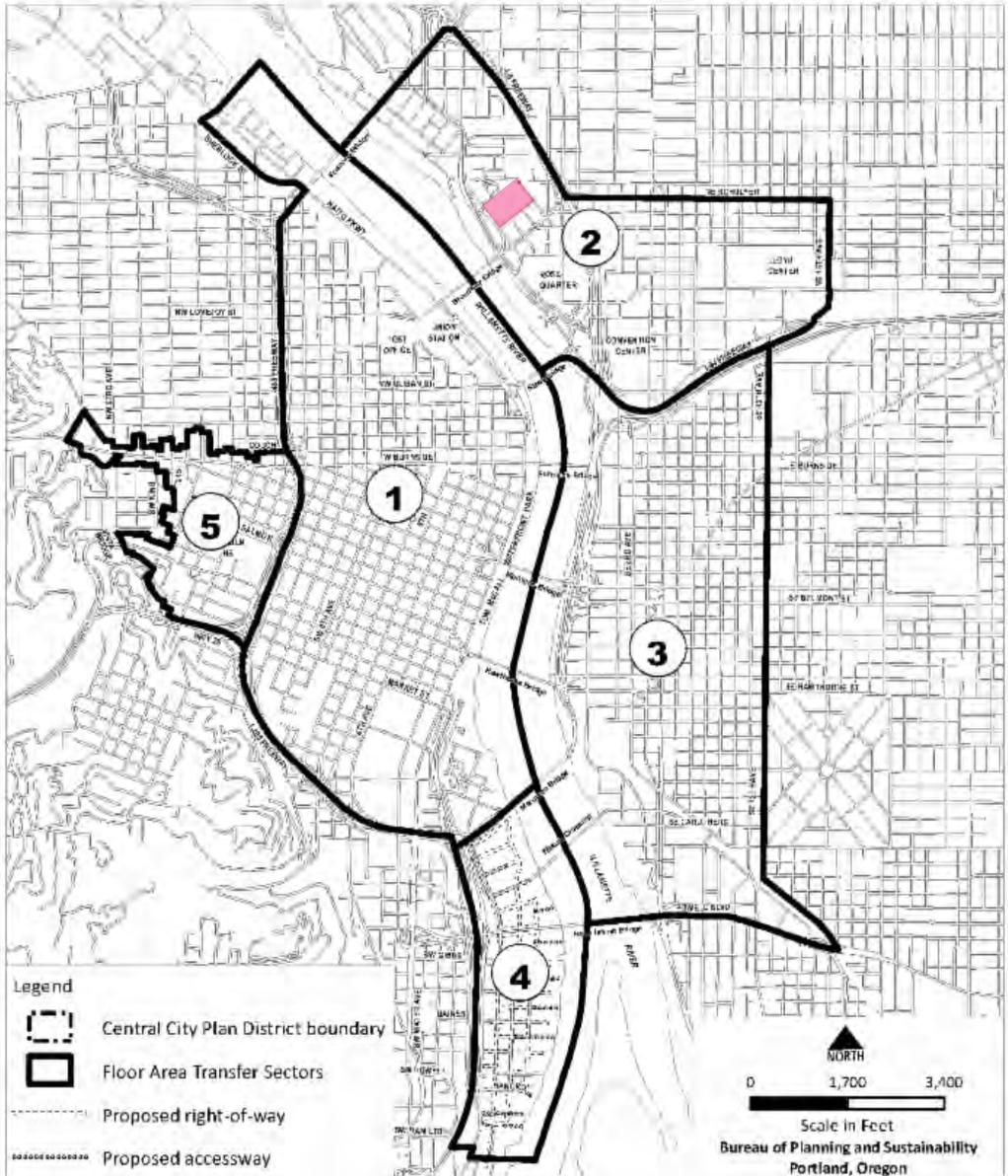
<https://www.portland.gov/council-clerk/events/2022/6/14/albina-vision-trust-work-session>

# BESC: FAR Transfer Options

## Floor Area Transfer Sectors

## Map 510-23

Map Revised August 10, 2020



# BESC: FAR Transfer Options

IF PPS wanted to transfer FAR, it appears possible. See 33.510.205

2. Transfer of floor area within a floor area transfer sector. In the RX, CX, EX, and OS zones, floor area, including bonus floor area and bonus floor area earned through a bonus that no longer exists in the zoning code, may be transferred between sites. The sites are not required to be abutting, however both the sending site and the receiving site must be located within the same floor area transfer sector shown on Map 510-23. In addition, floor area transfers are subject to the following requirements:
  - a. The sending site must not be a Historic or Conservation landmark or a contributing resource in a historic or a conservation district;
  - b. If bonus floor area is included in the transfer, the public benefit to be provided in exchange for the bonus floor area must be completed in advance or at the time of issuing any occupancy permit on the receiving site taking advantage of the bonus floor area; and
  - c. The property owner(s) must execute a covenant for both sites. The covenants must comply with the regulations of 33.700.060, must be recorded with the deeds for each site, and must reflect the existing floor area on each site and the respective increase and decrease of potential floor area.

# BESC: Right of Way and Street Improvements

Need to review Superblock exemption with BPS.

Need to confirm half-street improvements, etc.

# Meek: Renovation + Addition Approach



SITE PLAN



VIEW FROM NE



VIEW FROM SW

# Meek: Renovation + Addition Approach

Existing school - utilized most of existing building (~33,000sf)

- 10 classrooms
- Administration
- Community Partner spaces
- Media Center

Showing PPS Showing PPS Middle School "Maximum" program

Diagram assumes City will require 11-13' sidewalk sections, including locations along NE Webster and Cesar Chavez where there is currently no sidewalk.

The existing building constrains the east side of the site. This approach shows parking to the west and the bus loop to the east. It allows all students to approach the front door without crossing other paths of vehicular circulation. One challenge is that the bus exit driveway is very close to an intersection.

## Site Requirements (from PPS Ed Spec)

- Provide on-site vehicle and covered bicycle parking for personnel and students per city code requirement
- Provide (1) Softball Field 200-ft fence line shown
- Provide (1) Soccer Field (can overlay the Softball Field) U-11 field
- Play Equipment Area for 6th to 8th Grade
- Hardsurface Play Area for 6th to 8th Grade
- Separate Bus Drop-off Area
- Parking area for school personnel and visitors per the City of Portland Zoning Code shows min: 33 spaces
- Separate staff and visitors parking if possible limited opportunities to accommodate
- Play/Practice for baseball, soccer and running trail limited opportunities to accommodate

# Meek: Renovation + Addition

## Pros

- Retains most of existing structure:
  - neighborhood may value older structure,
  - it is eligible for NRHP
  - reduces waste by retaining/reusing existing structure
- Bus and car circulation are separate from each other; everyone enters one front door (note: this arrangement is also a con, as it increases the need for supervision during pick-up and drop-off)

## Cons

- The existing structure is inefficient (1-story)
- The existing structure will require partial to full modernization (most systems need replacing, some seismic work has been done)
- The existing structure is positioned close to the eastern property line, which restricts how that portion of the site can be used.
- North field area is constrained

# Meek: New Construction Approach



SITE PLAN



VIEW FROM NE



VIEW FROM SW

# Meek: New Construction

Showing PPS Middle School "Maximum" program

Diagram assumes City will require 11-13' sidewalk sections, including locations along NE Webster and Cesar Chavez where there is currently no sidewalk.

This option shows the bus loop to the west and parking to the east. It allows all students to approach the front door without crossing other paths of vehicular circulation.

## Site Requirements (from PPS Ed Spec)

- Provide on-site vehicle and covered bicycle parking for personnel and students per city code requirement.
- Provide (1) Softball Field 200-ft fence constrained
- Provide (1) Soccer Field (can overlay the Softball Field) U-11 field
- Play Equipment Area for 6th to 8th Grade
- Hardsurface Play Area for 6th to 8th Grade
- Separate Bus Drop-off Area
- Parking area for school personnel and visitors per the City of Portland Zoning Code shows max: 49 spaces
- Separate staff and visitors parking if possible limited opportunities to accommodate
- Play/Practice for baseball, soccer and running trail limited opportunities to accommodate

# Meek: New Construction

## Pros

- Flexibility to locate building on the site
- Can optimize program relationships (no fixed elements to work around)
- Bus and car circulation are separate from each other; everyone enters one front door (note: this arrangement is also a con, as it increases the need for supervision during pick-up and drop-off)
- Opportunity to create a single, efficient, modern building

## Cons

- Removes existing school
- North field area is constrained

# Meek: New Construction Approach (alternate bus)



SITE PLAN

VIEW FROM NE



VIEW FROM SW

# Meek: New Construction (alternate bus)

Showing PPS Middle School "Maximum" program

Diagram assumes City will require 11-13' sidewalk sections, including locations along NE Webster and Cesar Chavez where there is currently no sidewalk.

This option shows the bus loop wrapping the parking lot. It allows all students to arrive to the SE corner of the site. One challenge is designating safe passage for pedestrians from the parking lot to the front door.

## Site Requirements (from PPS Ed Spec)

- Provide on-site vehicle and covered bicycle parking for personnel and students per city code requirement.
- Provide (1) Softball Field 185-ft fence constrained
- Provide (1) Soccer Field (can overlay the Softball Field) U-11 field
- Play Equipment Area for 6th to 8th Grade
- Hardsurface Play Area for 6th to 8th Grade
- Separate Bus Drop-off Area
- Parking area for school personnel and visitors per the City of Portland Zoning Code shows max: 49 spaces
- Separate staff and visitors parking if possible limited opportunities to accommodate
- Play/Practice for baseball, soccer and running trail limited opportunities to accommodate

# Meek: New Construction (bus alternate)

## Pros

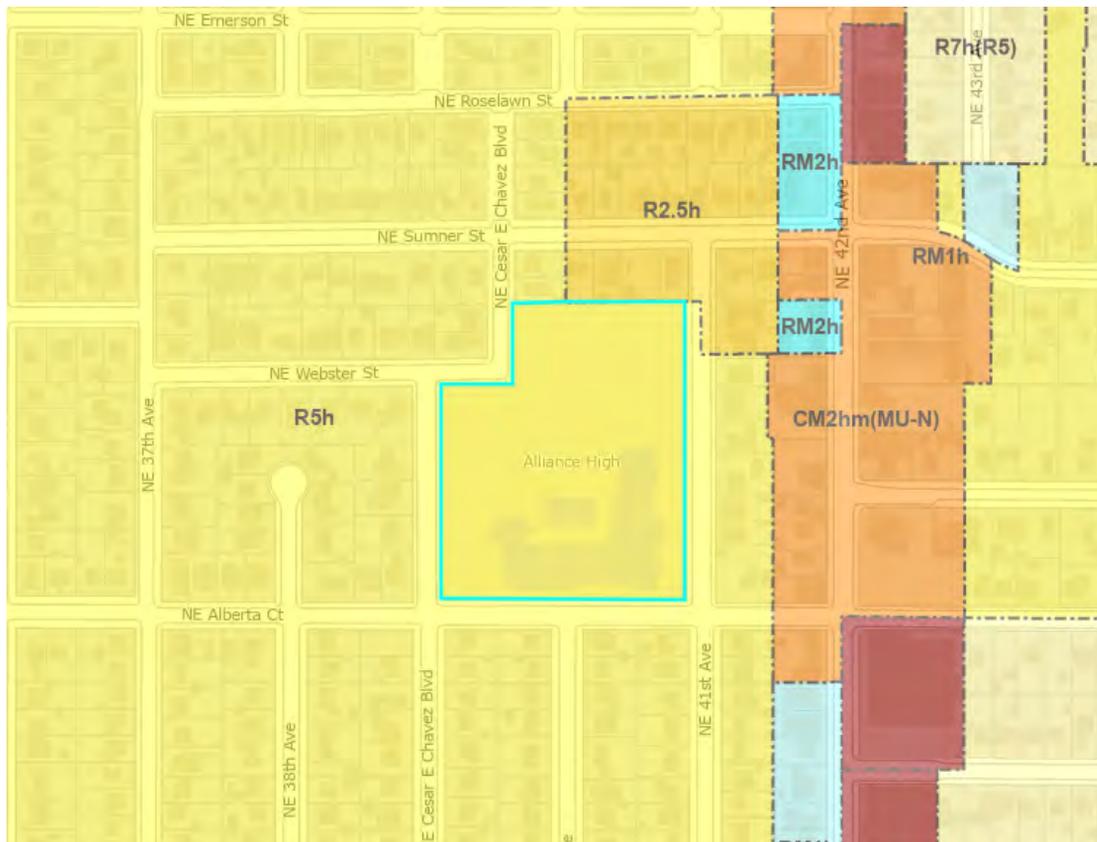
- Flexibility to locate building on the site
- Can optimize program relationships (no fixed elements to work around)
- All vehicular circulation located in one area
  - supports equity (every student arrives in same area, regardless of mode)
  - simpler supervision
- Opportunity to create a single, efficient, modern building

## Cons

- Removes existing school
- North field area is constrained
- Pedestrians moving from parking lot to building cross bus lane; would require raised crossing or other safety features

# Meek: Existing Conditions

- Site is 5.38 acres, zoned R5
- ~36,000sf existing building, 1-story
- Eligible for National Register of Historic Places



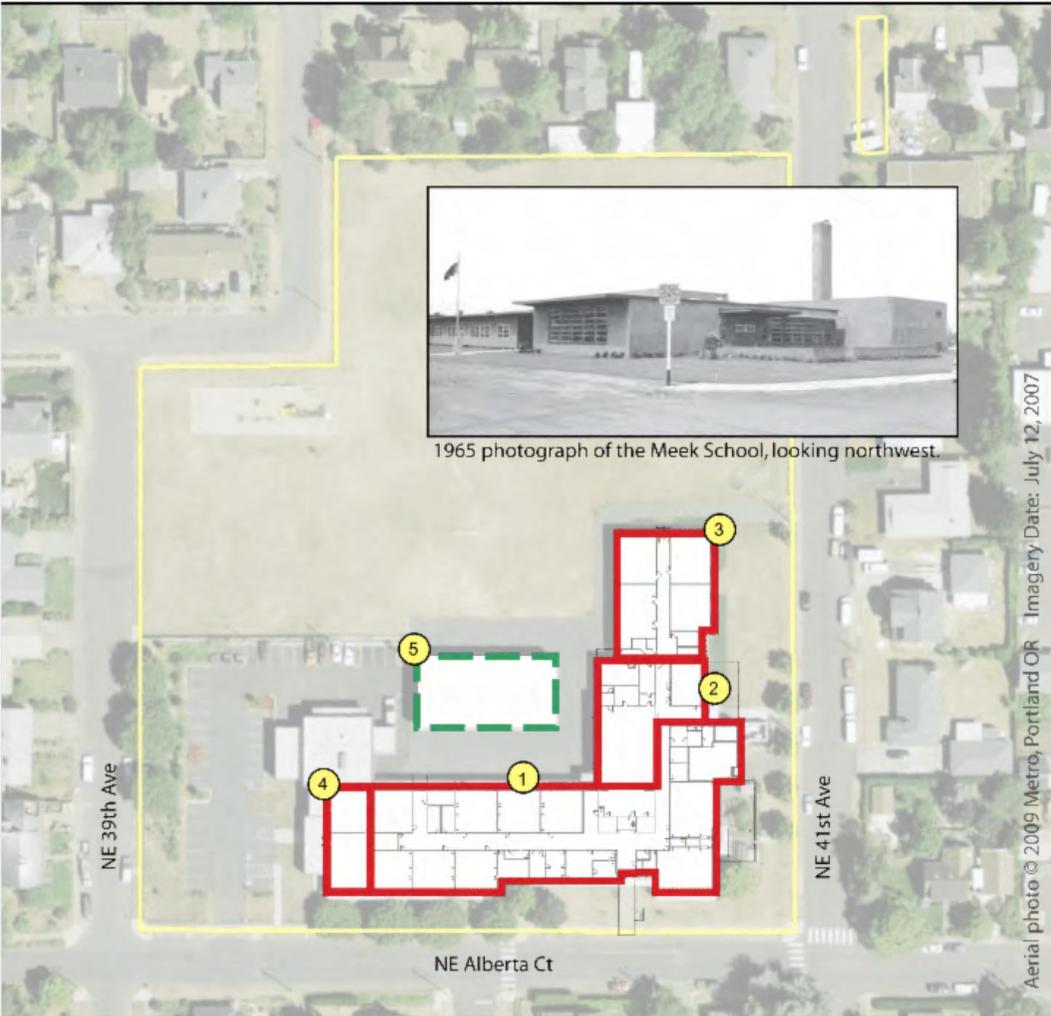
# Meek: Existing Conditions



## Alliance High School

4039 NE Alberta Ct, Portland OR, 97211

[View Site in Google Maps](#)



1965 photograph of the Meek School, looking northwest.

Aerial photo © 2009 Metro, Portland OR Imagery Date: July 12, 2007

**Historical Significance and Building Integrity**

- Contrib: High Significance
- Contrib: Moderate Signif.
- Non-Contributing

**Building Periods**

1. Original Building (270A), 1953
2. Addition (270A), 1958
3. Addition (270B), 1958
4. Addition (270A), 1975
5. Addition (270C), 1975

# Meek: Baseline Zoning Info

## Meek Zoning Summary

4039 NE Alberta Ct	existing building : 35,945 sf	existing building coverage: 37,194 sf
<b>Site Area</b>	5.38 acres	234,353 sf
<b>ZONE</b>	R5 - Residential	
<b>Overlays</b>	<b>h</b> = aircraft landing overlay	
<b>School Use</b>	Conditional Use	
<b>FAR (Floor Area Ratio)</b>	0.5:1	Allowable Building area: 117,176 sf (based on FAR)
<b>Maximum building coverage</b>	50%	Allowed coverage: 117,176sf (79,982 above existing sf)
<b>Height Limit</b>	50-feet	
<b>Setbacks</b>	15-feet min, 1-foot for every 2-foot height	surrounding streets are "local"
	50-foot setback to baseball, tennis, basketball 25-foot setback to playground if not illuminated	
<b>Historic</b>	Eligible for NRHP Criterion A	

# Meek: Key Zoning Restrictions

## Fields

### 33.279.020 Where These Regulations Apply

The regulations of this chapter apply if all the following are met:

- A. The recreational field is used for organized sports;
- B. The recreational field is in an OS, R, or IR zone; and
- C. The recreational field is located on a school, school site, or in a park.

### 33.279.040 Development Standards

- A. **Purpose.** Ensure that recreational fields and accessory structures will be compatible with and minimize negative impacts on adjacent uses.
- B. **Standards.** The standards of this subsection apply to new fields, alterations to existing fields, and accessory structures.
  - 1. **Recreational fields.** Recreational fields must be set back at least 50 feet from adjacent R or IR zoned sites. Setbacks are measured from property lines to foul line for baseball and softball fields, and to the field end or side lines for all other sports.
  - 2. **Accessory structures.** Spectator seating such as bleachers or benches must be set back at least 30 feet from adjacent R or IR zoned sites and at least 15 feet from all other lot lines. All other accessory structures including dugouts, concession stands, and restrooms must be set back at least 15 feet from all lot lines.

## Parking

**Table 266-2**  
**Parking Spaces by Use [2]**  
**(Refer to Table 266-1 to determine which standard applies.)**

Use Categories	Specific Uses	Standard A	Standard B
Schools	Grade, elementary, middle, junior high	1 per classroom	1.5 per classroom

Minimum:  $1 \times 33 =$   
**33 spaces**  
Maximum:  $1.5 \times 33 =$   
**50 spaces**

### 33.266.115 Maximum Allowed Parking Spaces

- A. **Purpose.** Limiting the number of spaces allowed promotes efficient use of land, enhances urban form, encourages use of alternative modes of transportation, provides for better pedestrian movement, and protects air and water quality.

The maximum ratios in this section vary with the use the parking is accessory to and with the location of the use. These maximums will accommodate most auto trips to a site based on typical peak parking demand for each use. Areas that are zoned for more intense development or are easily reached by alternative modes of transportation have lower maximums than areas where less intense development is anticipated or where transit service is less frequent. In particular, higher maximums are appropriate in areas that are more than a 1/4 mile walk from a frequently served bus stop or more than a 1/2 mile walk from a frequently served Transit Station.
- B. **Maximum number of parking spaces allowed.** Regulations in a plan district or overlay zone may supersede the regulations in this Subsection.

# Bike Parking

**Table 266-6  
Minimum Required Bicycle Parking Spaces [1]**

		Long-term Spaces		Short-term Spaces	
<b>Institutional Categories</b>					
Basic Utilities	Transit centers	30 spaces	30 spaces	12 spaces	12 spaces
	Light rail stations	12 spaces	12 spaces	4 spaces	4 spaces
Community Service		2, or 1 per 6,700 sq. ft. of net building area	2, or 1 per 12,500 sq. ft. of net building area	2, or 1 per 6,300 sq. ft. of net building area	2, or 1 per 10,000 sq. ft. of net building area
	Libraries, community centers and museums	2, or 1 per 3,000 sq. ft. of net building area	2, or 1 per 5,900 sq. ft. of net building area	2, or 1 per 1,200 sq. ft. of net building area	2, or 1 per 2,000 sq. ft. of net building area
	Park and ride	12, or 5 per acre	12, or 5 per acre	6 spaces	6 spaces
Parks and Open Areas		None	None	Per CU Review	Per CU Review
Schools	Grades K through 8	6 per classroom	5 per classroom	2, or 1 per 25,000 sq. ft. of net building area	2, or 1 per 100,000 sq. ft. of net building area
	Grades 9 through 12	5 per classroom	5 per classroom	2, or 1 per 25,000 sq. ft. of net building area	2, or 1 per 100,000 sq. ft. of net building area
Colleges	Excluding dormitories (see group living, above)	2, or 1 per 10,000 sq. ft. of net building area	2, or 1 per 20,000 sq. ft. of net building area	2, or 1 per 10,000 sq. ft. of net building area	2, or 1 per 16,000 sq. ft. of net building area

**Bicycle Parking Areas**

**Map 266-1**



=5 x 33 = 165 spots  
(covered)  
2 "short term" spots =  
**85 U-racks**



**KEYNOTES:**

- (A) THE 1963 ENTRY TO THE SCHOOL IS DELINEATED BY A CONCRETE PANEL ON THE SOUTH ELEVATION.
- (B) AN L-SHAPED CORRIDOR PROVIDES CIRCULATION FOR THE SCHOOL. FINISHES CONSIST OF LINOLEUM TILE FLOORS, WOOD AND METAL FRAMING AND MOLDING, AND WOOD CLASSROOM DOORS.
- (C) THE CAFETORIUM FEATURES FOLDING TABLES AND BENCHES THAT RECESS INTO THE WALL. FINISHES INCLUDE A LINOLEUM TILE FLOOR, WOOD DOORS, AND DOUBLE PANE, HINGED METAL WINDOWS.
- (D) THE CLASSROOMS ARE PRIMARILY SQUARE OR RECTANGULAR. FINISHES INCLUDE LINOLEUM TILE FLOORS, PAINTED BUILT-INS AND FURNISHINGS, CLOSETS, WOODEN DOORS AND UNPAINTED WOOD FRAMING AND MOLDING.
- (E) THE 1968 WING PROVIDES SPACE FOR 3 CLASSROOMS AND A MUSIC ROOMS. FINISHES ARE SIMILAR THOSE IN THE MAIN WING BUT THERE ARE MINIMAL BUILT-INS.
- (F) ADDITION IN 1975

**GENERAL NOTES:**

- (1) THE SINGLE STORY, WOOD FRAME SCHOOL IS CLAD WITH BRICK VENEER.
- (2) FENESTRATION CONSISTS PRIMARILY OF VERTICAL THREE LIGHT, METAL FRAME, HINGED WINDOWS.

rough plan for re-use of Meek (in Renovation +Addition scheme)

1 MEEK SCOOOL - 1ST FLOOR  
SCALE: 1" = 30'-0"



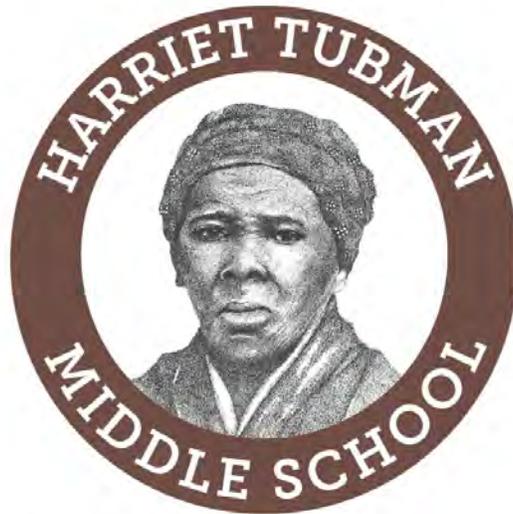
MEEK SCHOOL - 270  
4039 NE ALBERTA CT 97211

PPS HISTORIC ASSESSMENT



DRAWING: ANNOTATED PLAN

DATE: Sept. 4, 2009



# HARRIET TUBMAN MIDDLE SCHOOL [RE]SITING

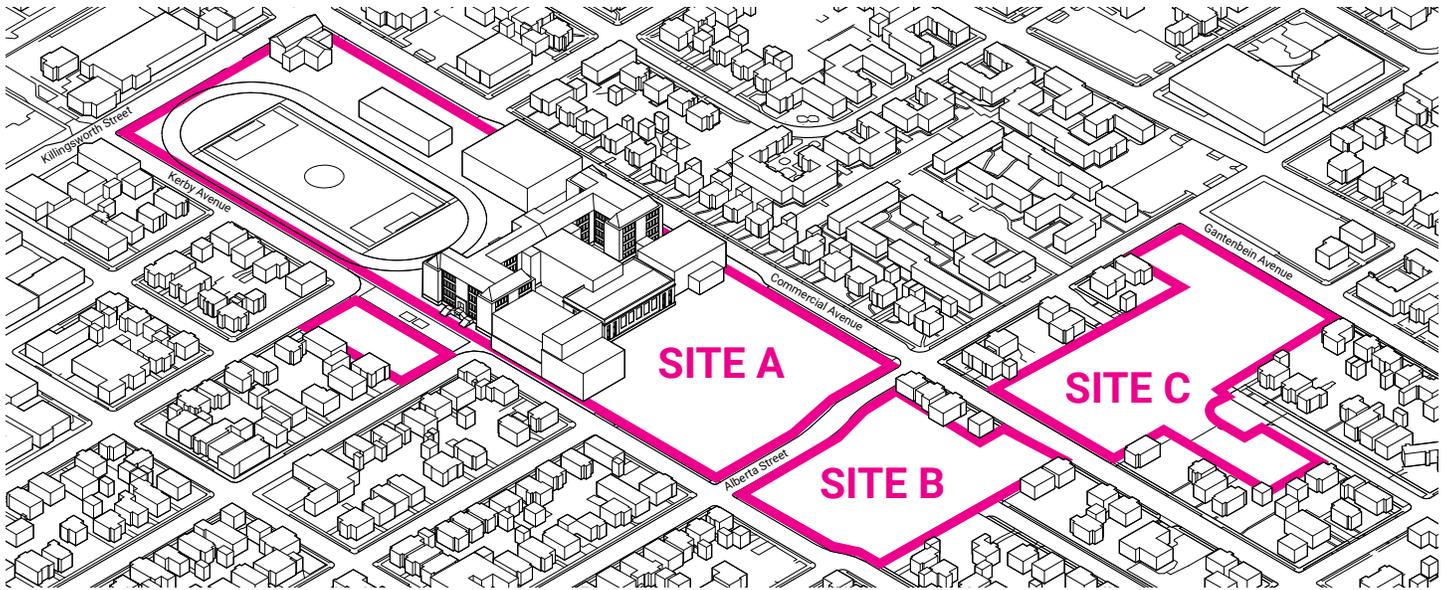
JHS and Humboldt Site Studies



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# EXECUTIVE SUMMARY



In June 2022 the Office of School Modernization (OSM) asked Bora Architecture & Interiors to evaluate three potential sites as possible locations for the relocated Harriet Tubman Middle School. This report describes the results of that evaluation.

This study looked at three specific potential sites as follows:

**Site A:** The main large parcel currently occupied by the Jefferson High School main building and the track and field.

**Site B:** The vacant parcel directly to the south of Jefferson High School located on the south side of North Alberta Street.

**Site C:** The site currently formerly occupied by Humboldt Middle School and currently leased to Kairos.

A detailed description of each site, including their easements and other encumbrances, is included in

the body of this report.

## Building Program:

For the purposes of this study, OSM asked Bora to use the recently completed Kellogg Middle School as the basis for the overall size of the building. Kellogg also served as the basis for determining the number of parking spaces for cars and busses. The Middle School design options shown in this study contain about 95,000 gross square feet.

## Methodology:

The team’s methodology included planning and zoning research, title report review, the development of multiple evaluation criteria, conceptual massing and organizational strategies, and finally an evaluation of the potential of each site to serve as the new home for Harriet Tubman Middle School. Cost estimates are also provided with summary for the

options in the report along with detailed cost model estimates included in the appendix.

## Conclusions:

**Site A:** The team investigated two potential design solutions for Site A:

A.1 retains and modernizes the historic 1909 structure. New instructional spaces are constructed to the south of the 1909 structure. A new Middle School would be constructed immediately to the south in remarkably close proximity to the modernized JHS. The existing track and field would remain in its current location. Option A.1 results in an extremely dense JHS building with limited access to natural light and challenging access for the community. It also results in a 4-story Middle School without any access to outdoor play area or sports fields. The combined massing of the two buildings are

ill-suited to the residential scale of the surrounding neighborhood.

A.2 fully replaces the existing JHS with a new 4-story structure on Killingsworth. A new Middle School would be constructed on the south side of the side. In this scenario there is not enough room remaining between the two buildings to accommodate a new track and field. This option is not feasible and should not be pursued further.

Site B: This site is the smallest of the three sites that were studied. It is possible to fit a 4-story Middle School on this site. However, it is not possible to accommodate any outdoor play fields. In addition to this significant drawback, the

site is bisected by a public sewer easement and line that would need to be relocated at great cost to the District. Finally, there is Northwest Natural Gas Pressurization facility locate in easement on the eastern portion of the site. Further investigation is required to determine the potential health and life safety impacts and risks associated with this facility.

Site C: This site can accommodate the required Middle School program in a three-story structure. The site is also large enough to provide outdoor play and recreation spaces, but not large enough to provide regulation-sized sports fields. There is the potential that the City of Portland will require costly right of way improvements

to support redevelopment of this property. The most substantial obstacle to development of this site is the existing multi-year lease with Kairos. Nonetheless, this site has the fewest drawbacks from the physical planning perspective.

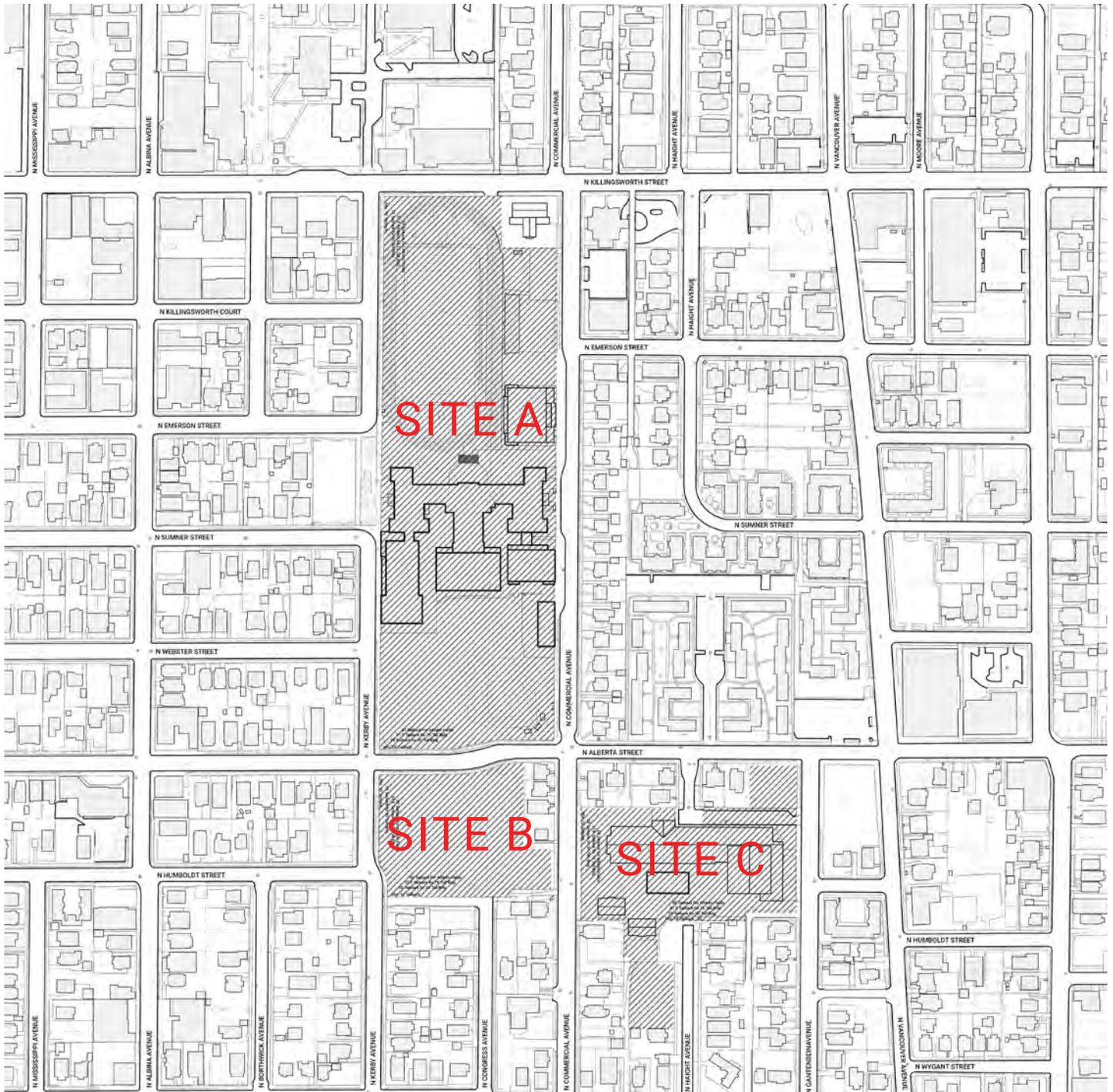
**EVALUATION CRITERIA MATRIX SUMMARY**

	<b>A.1</b> JHS MAIN LOT / NEW Keep HS per CMP	<b>A.2</b> JHS MAIN LOT / NEW HS North	<b>B</b> JHS South Lot	<b>C</b> Humboldt
<b>Program (Interior)</b>	● ○ ○	● ○ ○	● ● ●	● ● ●
<b>Program (Site)</b>	● ● ○	● ○ ○	● ○ ○	● ● ●
<b>Jurisdictional Requirements</b>	● ○ ○	● ○ ○	● ● ○	● ● ●
<b>Schedule</b>	● ○ ○	● ○ ○	● ● ○	● ● ○
<b>Community</b>	● ● ○	● ○ ○	● ● ○	● ● ○

SEE APPENDIX 1 FOR DETAILED MATRIX

# SITES

This study considers the viability of three sites owned by Portland Public Schools in the vicinity of Jefferson High School as possible locations for Harriet Tubman Middle School [HTMS]. The Jefferson High School [JHS] Modernization Project is in early planning and the design effort will begin in early 2023. The original 1909 structure may be retained, but all other structures will probably be removed and replaced. The JHS Comprehensive Planning Committee will be studying site planning options in late summer that will inform the final strategy for the modernized school. The site is small for a High School facility and does not have adequate space for the full suite of fields that would ideally serve the students. The three sites in consideration are Site A - JHS Site; Site B - JHS South; and Site C - Humboldt.



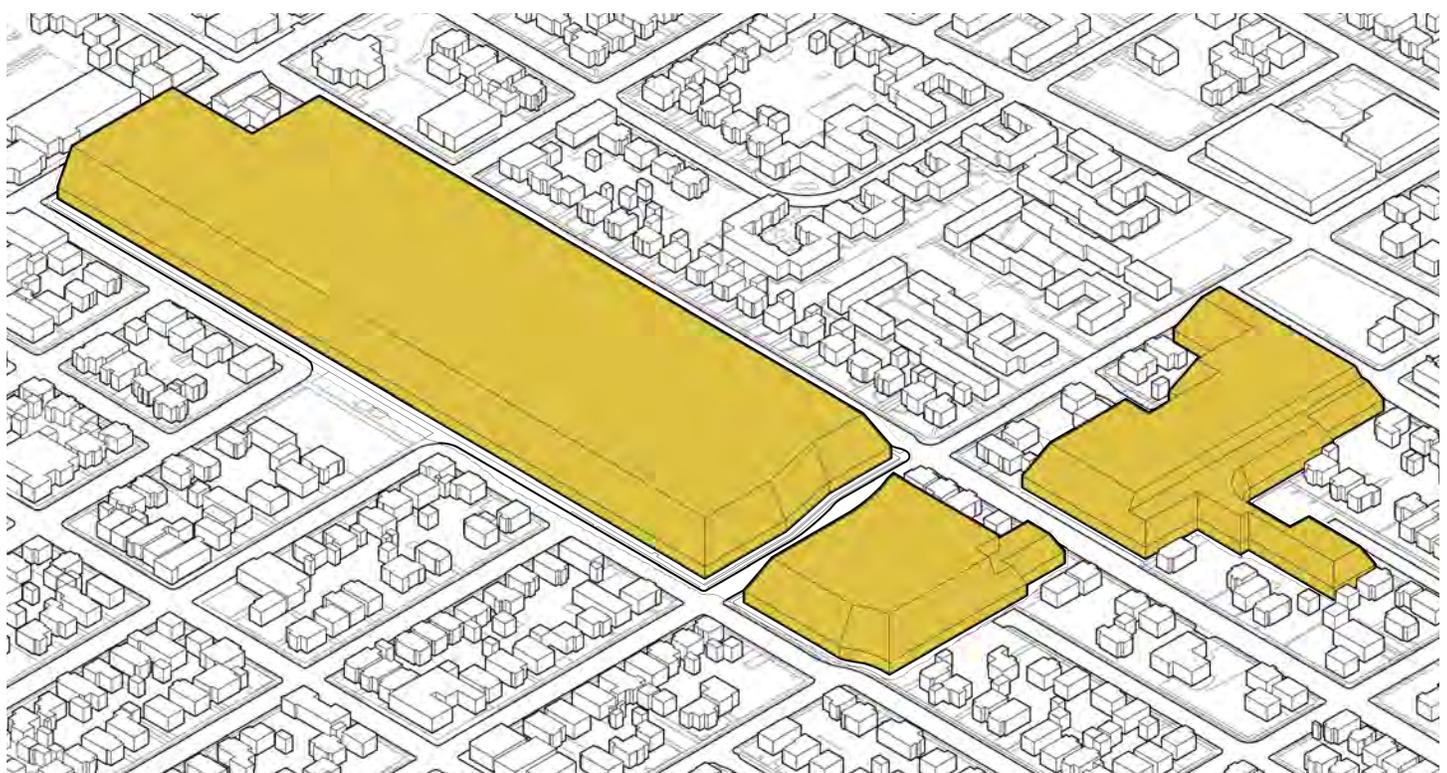
# SITES

Site A - JHS Site - is currently occupied by Jefferson High School's buildings and its track and field facilities. North Killingsworth Street bounds the north side of the site. The northeast corner of the property is home to the North Portland Public Library, which is also planned to undergo a renovation and expansion in the near future. North of Killingsworth, Portland Community College's Cascade Campus brings students from across the region to this neighborhood, and provides the unique Middle College program to Jefferson students. Site A is bounded to its south by Alberta Street. The property is considered a "Superblock" by the City of Portland, which will strongly encourage PPS to introduce a new bike/pedestrian access across the site to mitigate its impact on the residential community.

Site B - JHS South - sits south of Alberta Street. This property is currently used by JHS as a secondary field, and the property is encumbered by a suite of easements that benefit Northwest Natural Gas. An above grade utility facility is located to the northwest, and below grade systems occupy the western edge. This property also currently hosts a sanitary sewer connecting Congress Avenue to the south with Alberta Street, which would likely need to be relocated if this site is selected for development. While the site is currently underutilized by JHS, it is a key location for future fields for the High School modernization project.

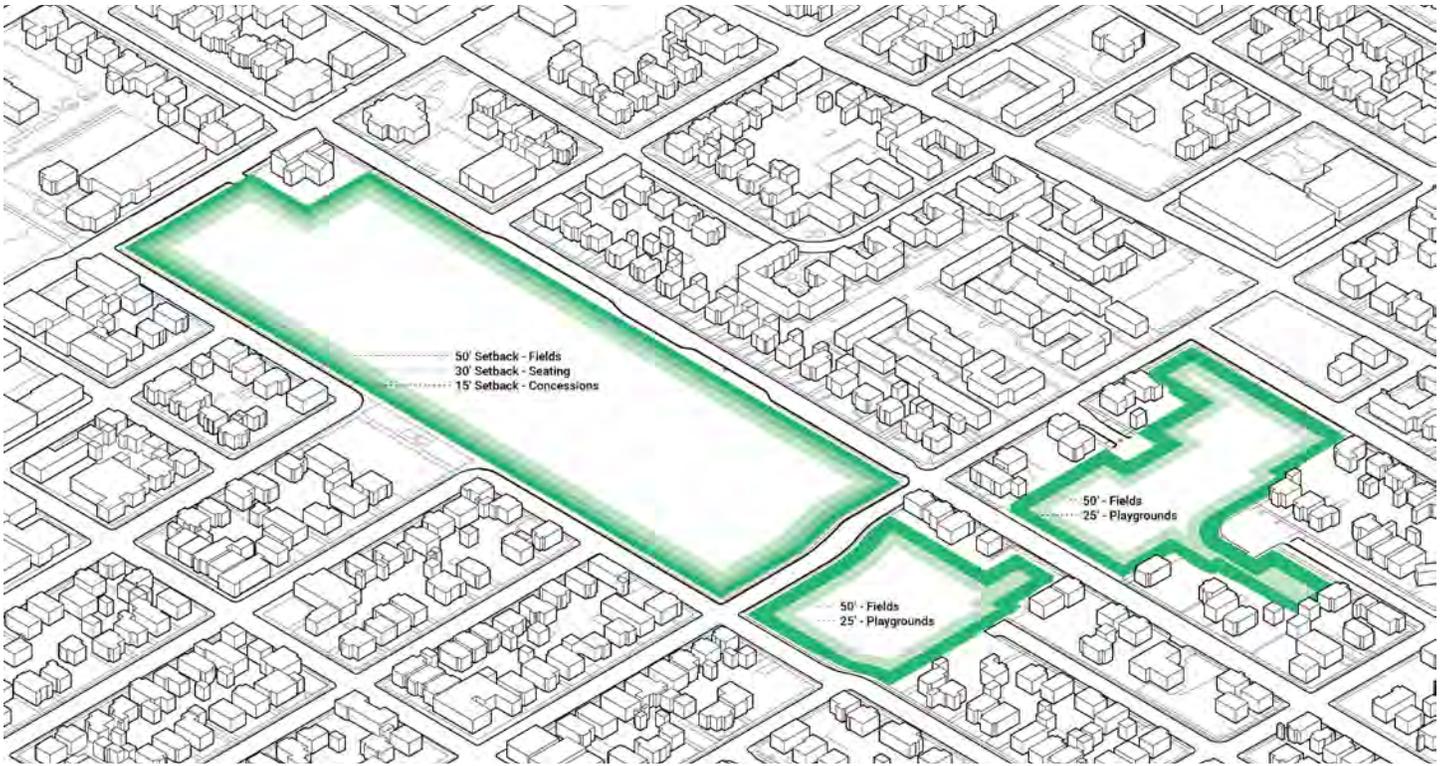
Site C - Humboldt - is home to the former Humboldt Elementary School, which PPS has leased to KairosPDX, a local charter school serving K-5 students. This property is a complex shape and includes three residential lots to the south. The northeast corner of the property is currently used as a thriving community garden.

SITE	SITE AREA (ACRES)	SITE AREA (SF)	FAR	BUILDABLE AREA (GSF)	MAX BUILDING AREA (GSF)	MAX HEIGHT AT SITE
A	11.28	491,357	2	982,714	982,714	75'
B	1.97	85,813	2	171,626	176,418	75'
	0.22	9,583	0.5	4,792		
C	2.98	99,809	2	199,618	222,118	75'
		45,000	0.5	22,500		

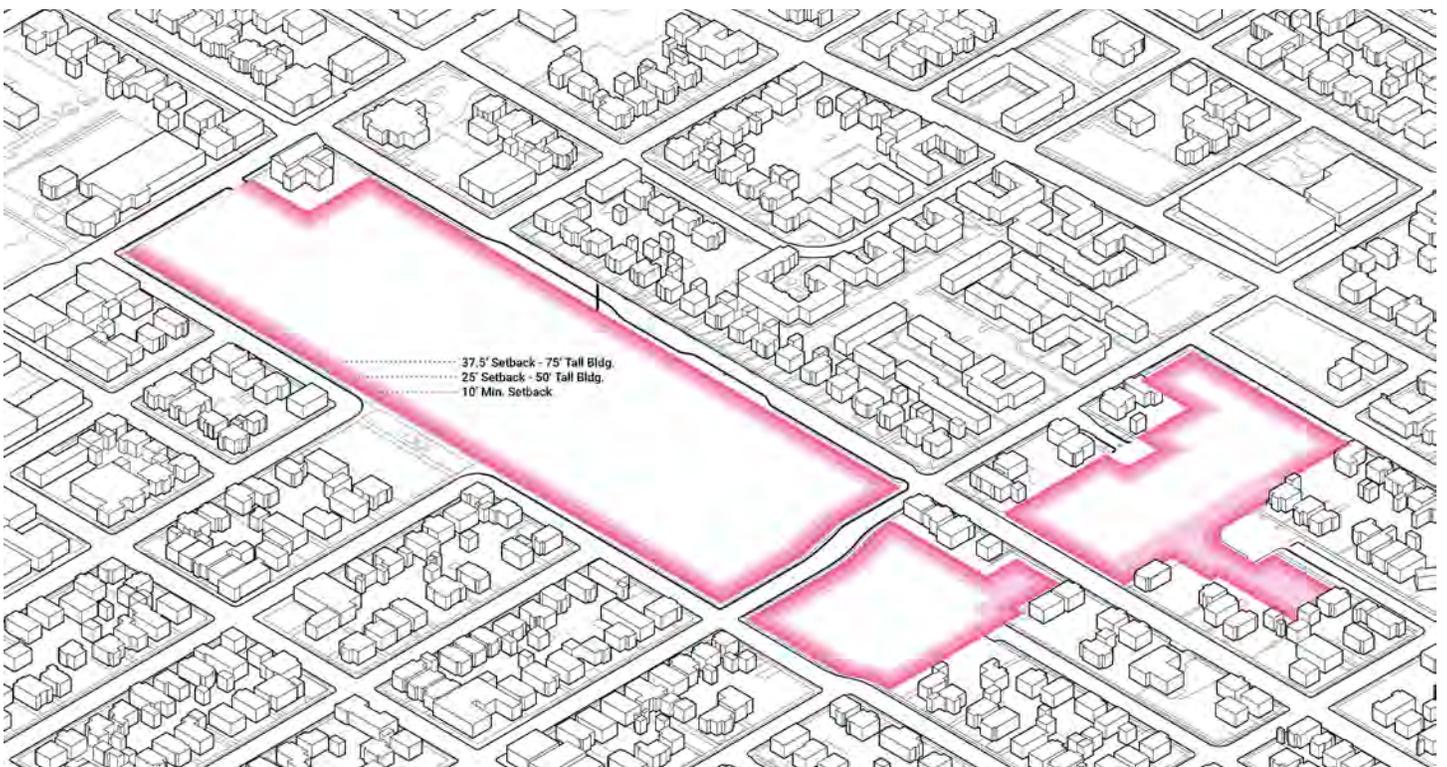


SETBACKS & HEIGHT RESTRICTIONS

# SITES



SETBACKS - ATHLETIC FACILITIES



SETBACKS - BUILDING

# SITE CONSIDERATIONS + ANALYSIS

## ZONING & LAND USE ANALYSIS

The following information establishes the development criteria and limitations for each site as governed by Title 33 and its related reference documents. Of particular interest for the Harriet Tubman Middle School project are the maximum density that is possible on each site, as governed by the FAR [floor area ratio, or how much square footage of development is permissible on any given property], required setbacks from property lines, and the height limitations that are placed on each site.

SITE	SITE AREA (ACRES)	SITE AREA (SF)	FAR	BUILDABLE AREA (GSF)	MAX BUILDING AREA (GSF)	MAX HEIGHT AT SITE
<b>A</b>	11.28	491,357	2	982,714	982,714	75'
<b>B</b>	1.97	85,813	2	171,626	176,418	75'
	0.22	9,583	0.5	4,792		
<b>C</b>	2.98	99,809	2	199,618	222,118	75'
		45,000	0.5	22,500		

### Harriet Tubman Middle School Relocation - Zoning Analysis

#### Site A: JHS co-location

**5210 N Kerby Avenue (bounded by N Killingsworth, N Kerby, N Alberta and N Commercial)**

Zoning: IR – Institutional Residential

Overlay: m – Centers Main Street – on the south 120 feet (appx.) of the site

Conservation District: Piedmont Conservation District

**Uses:** School uses (except for High Schools) are a Conditional Use in the IR zone

Killingsworth is a transit street, and entire site is located in the Killingsworth/Interstate Pedestrian district

#### Site B: JHS South Lot

**574 N Alberta (bounded by N Humboldt, N Kerby, N Alberta and N Commercial – not including NE corner)**

Zoning: IR – Institutional Residential except for southeast corner (appx 70 ft) zoned R2.5 – Residential 2,500

Overlay: none

**Uses:** School uses are a Conditional Use in the IR zone and R2.5

Entire site is located in the Killingsworth/Interstate Pedestrian district

#### Site C: Humboldt Site

**4915 N Gantenbein Ave (Bounded by N Commercial and N Gantenbein on E/W. N Haight Ave dead ends into site on N/S)**

Zoning: North half RM2 – Residential Multi-Dwelling 2

South half R2.5 – Residential 2,500

**Uses:** School uses are a Conditional Use in the RM2 and R2.5 zones.

**Note:** Portions of the identified site are located within the public right-of-way of N Haight Avenue and two un-named public alleys. Developing these lands will first require these streets to be vacated by the City of Portland.

# SITE CONSIDERATIONS + ANALYSIS

## CIVIL / RIGHT OF WAY IMPROVEMENTS

New construction projects in Portland often encounter significant development complexity and costs associated with Right-of-Way [ROW] improvements. Bora's Civil Engineering consultant, Vega, has reviewed each of the sites under consideration and offered its opinion of the City's likely requirements for each property.

City requirements vary and can include dedicating more of the privately held land to increase sidewalk dimensions, therefore reducing the available footprint for development, creating more accessible intersections and crossings, adding entire public access ways across large "super block" sites, and on occasion completely upgrading intersections including street lighting and signals. Vega's report addresses these considerations and also identifies utility-related challenges that are apparent in public records.



### **Harriet Tubman ROW Improvement Study**

Date: July 14, 2022

#### **Public Street Improvements**

Portland Bureau of Transportation (PBOT) requires public frontage improvements when renovations to a property exceed 35% of its assessed value and/or the trips to the site are increased. Under these conditions, all three site options will require public frontage improvements.

#### **Site A – Jefferson High School North Lot**

Entire site is within a pedestrian district. A lighting study will likely be required, and additional street lighting will be needed.

N Killingsworth St – Neighborhood Main Street (Pedestrian District) – 15' sidewalk corridor required. If existing brick wall along Killingsworth is to be protected, an alternative review would be required to protect the existing corridor. If new high school building is proposed on Killingsworth, a ROW dedication will be required to provide the 15' sidewalk corridor and sidewalk must be rebuilt. Existing ADA ramp crossing Killingsworth at Kerby Ave appears to meet current ADA standards but additional evaluation is needed to confirm.

N Commercial Ave – Local Street (Pedestrian District) – 12' sidewalk corridor required. Existing corridor is close to meeting required corridor and will likely be protected. A ROW dedication is not expected. New ADA ramps will be required at the intersection with N Emerson St. and at the intersection with N Alberta St. A new East/West vehicular or pedestrian connection through the site will also require ADA ramps.

## SITE CONSIDERATIONS + ANALYSIS

### CIVIL / RIGHT OF WAY IMPROVEMENTS

N Kerby Ave – Local Street (Pedestrian District) – 12' sidewalk corridor required. North of Emerson St, the existing corridor meets requirements. Between Emerson St and Sumner St, the entire roadway is closed to vehicular traffic. This condition will likely be protected. South of Sumner St, reconstruction of pedestrian corridor will be required to meet current standards. A ROW dedication is not expected. Existing ADA ramp crossing Kerby St at Killingsworth St appears to meet current ADA standards but additional evaluation is needed to confirm. Existing ADA ramps crossing Kerby Ave at Killingsworth Ct appear to meet current ADA standards, but additional evaluation is needed to confirm. Existing ADA ramp crossing Kerby Ave at Emerson St does not meet current ADA standards and will need to be rebuilt. Existing ADA ramp crossing Kerby Ave at Sumner St does not meet current ADA standards and will need to be rebuilt. Two new ramps will be required to cross Kerby Ave at Webster St. Existing ADA ramp crossing Kerby Ave at Alberta St does not meet current ADA standards and will need to be rebuilt. A new East/West vehicular or pedestrian connection through the site will also require ADA ramps.

N Alberta St - Local Street (Pedestrian District) – 12' sidewalk corridor required. The existing corridor appears to meet requirements and may be protected. A ROW dedication is not expected. Existing ADA ramp crossing Alberta St at Kerby Ave does not meet current ADA standards and will need to be rebuilt. Existing ADA ramp crossing Alberta St at Commercial St does not meet current ADA standards and will need to be rebuilt.

#### **Site B – Jefferson High School South Lot**

Entire site is within a pedestrian district. A lighting study will likely be required, and additional street lighting will be needed.

An 8-inch public combined sewer runs through the site connecting Alberta St to Humboldt St. A 20-foot easement will be required with no building construction located within the easement. Single family homes along Commercial St will need to have sewer investigation completed to determine if they are connecting to the public main running through the site. If the public main is to be removed, new connections for the single family residential lots may be required. A public sewer extension from Humboldt St or Commercial St would also be required to collect the stormwater inlets on Alberta St.

N Alberta St - Local Street (Pedestrian District) – 12' sidewalk corridor required. The existing corridor appears to meet requirements and may be protected. A ROW dedication is not expected. Existing ADA ramp crossing Alberta St at Kerby Ave does not meet current ADA standards and will need to be rebuilt.

N Kerby Ave – Local Street (Pedestrian District) – 12' sidewalk corridor required. North of Humboldt St, the existing corridor meets requirements and may be protected. At the intersection with Humboldt St, a ROW dedication and reconstruction of sidewalk corridor may be needed. Existing driveway to access Humboldt St may be required to be removed and replaced with a standard intersection and radiused curbs. Existing ADA ramp crossing Kerby Ave at Alberta St does not meet current ADA standards and will need to be rebuilt. The intersection with Humboldt is offset and will require up to three new ADA ramps crossing Kerby Ave.

## SITE CONSIDERATIONS + ANALYSIS

### CIVIL / RIGHT OF WAY IMPROVEMENTS

N Humboldt St – Local Street (Pedestrian District) – 12' sidewalk corridor required. N Humboldt St between Kerby Ave and Congress Ave has been built similar to an alley but it is not designated as an alley. The original Humboldt ROW looks to be vacated and the new alignment was previously dedicated. The existing ROW is 25' wide. A ROW dedication to provide a pedestrian connection from Kerby Ave to Congress Ave will likely be required. Two new ADA ramps will be required crossing Humboldt at Kerby Ave and Congress Ave.

N Commercial Ave – Local Street (Pedestrian District) – 12' sidewalk corridor required. Existing corridor is close to meeting required corridor and will likely be protected. A ROW dedication is not expected. No ADA ramps will be required.

#### **Site C – Humboldt**

N Commercial Ave – Local Street – 11' sidewalk corridor required. Existing corridor is close to meeting required corridor and will likely be protected. A ROW dedication is not expected. Existing driveway will need to be removed and replaced with standard sidewalk corridor. No ADA ramps will be required.

N Haight St – Local Street – 11' sidewalk corridor required. Standard cul-de-sacs will be required at termination of Haight St. on North and South sides of property. Existing ROW width is 65' which is sufficient for a cul-de-sac with curb tight sidewalk. A ROW dedication is not expected. No ADA ramps will be required.

N Gantenbein Ave – Local Street – 11' sidewalk corridor required. The existing corridor appears to meet requirements and may be protected. A ROW dedication is not expected. Traffic and parking design on Gantenbein Ave, North of Humboldt Ave, will likely need to be reviewed by a traffic engineer and potentially require revisions. Existing ADA ramp crossing Gantenbein Ave at Alberta Ave appears to meet current ADA standards but additional evaluation is needed to confirm. Existing ADA ramp crossing Gantenbein Ave at Humboldt Ave appears to meet current ADA standards but additional evaluation is needed to confirm. No ADA ramp exists crossing Gantenbein Ave on South side of Humboldt Ave. This pedestrian crossing will need to be closed. Existing driveways will need to be rebuilt to current standards.

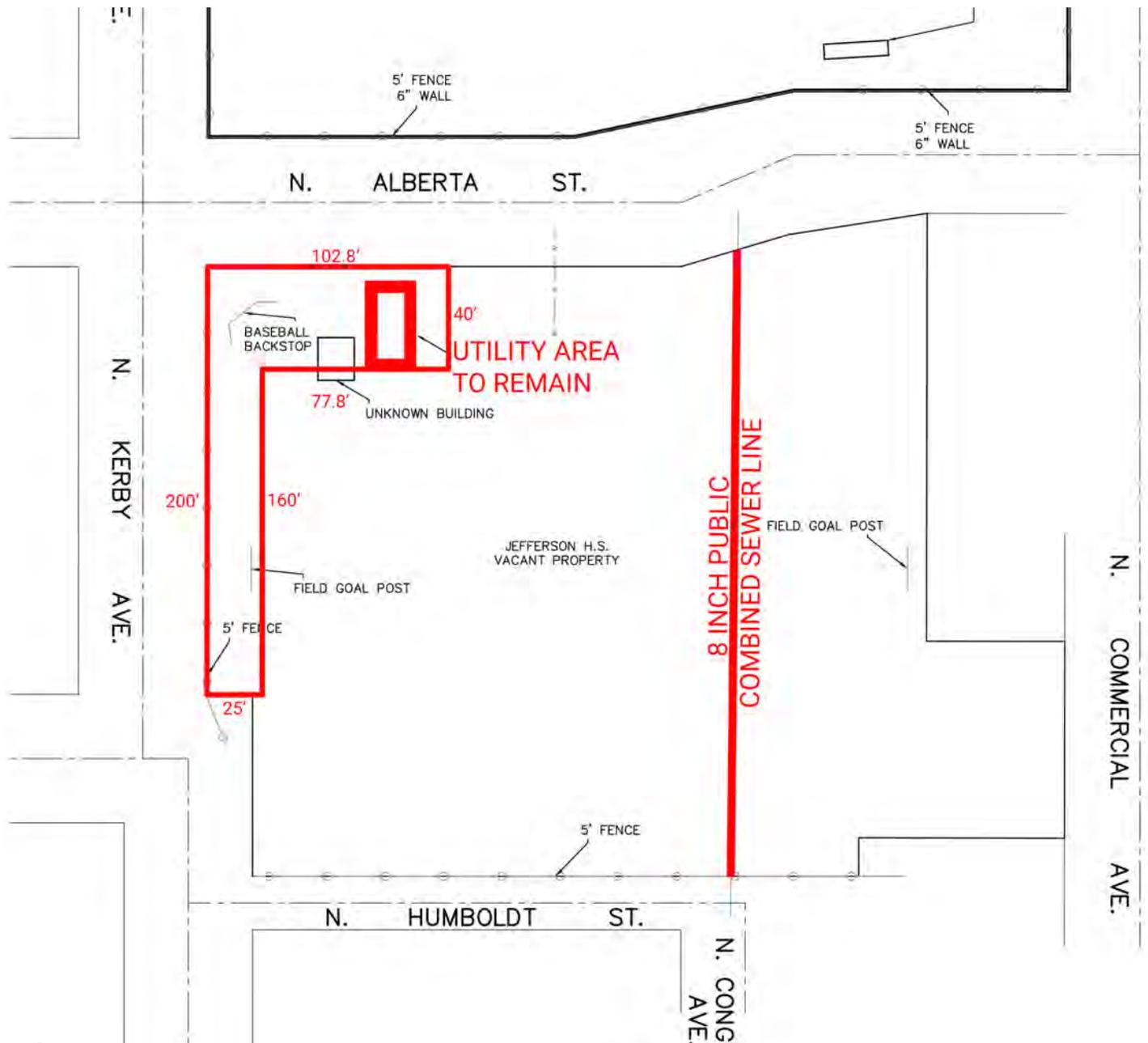
N Commercial Ave – Haight Ave Alley – Local Street – 20' ROW required. Existing ROW is 16' which will require a 2' ROW dedication. Paved vehicular connection to Blandena St may be required. No ADA ramps will be required.

N Haight Ave – Gantenbein Ave Alley – Local Street – 20' ROW required. Existing ROW is 21' which will not require a ROW dedication. No Improvements are expected. No ADA ramps will be required.

# SITE CONSIDERATIONS + ANALYSIS EASEMENT

Site B is encumbered by utility easements and other conditions that make site development more complicated than the other sites under consideration. The most significant includes above grade Northwest Natural Gas regulator equipment on the northwest side of the property. There is also a below grade easement along the entire west side of the lot as shown in the diagram below, for a deep bed anode system that protects gas infrastructure from corrosion.

In addition to these easements, an existing active city sanitary sewer connects North Congress Avenue to North Alberta Street across the center of the property, as shown below. While this sewer line could be relocated and reconfigured, this cost would burden the development costs for Site B.



SEE APPENDIX 3

# SITE CONSIDERATIONS + ANALYSIS

## HISTORIC DESIGNATION

### Historic Status of Site A and Planning Implications For Development

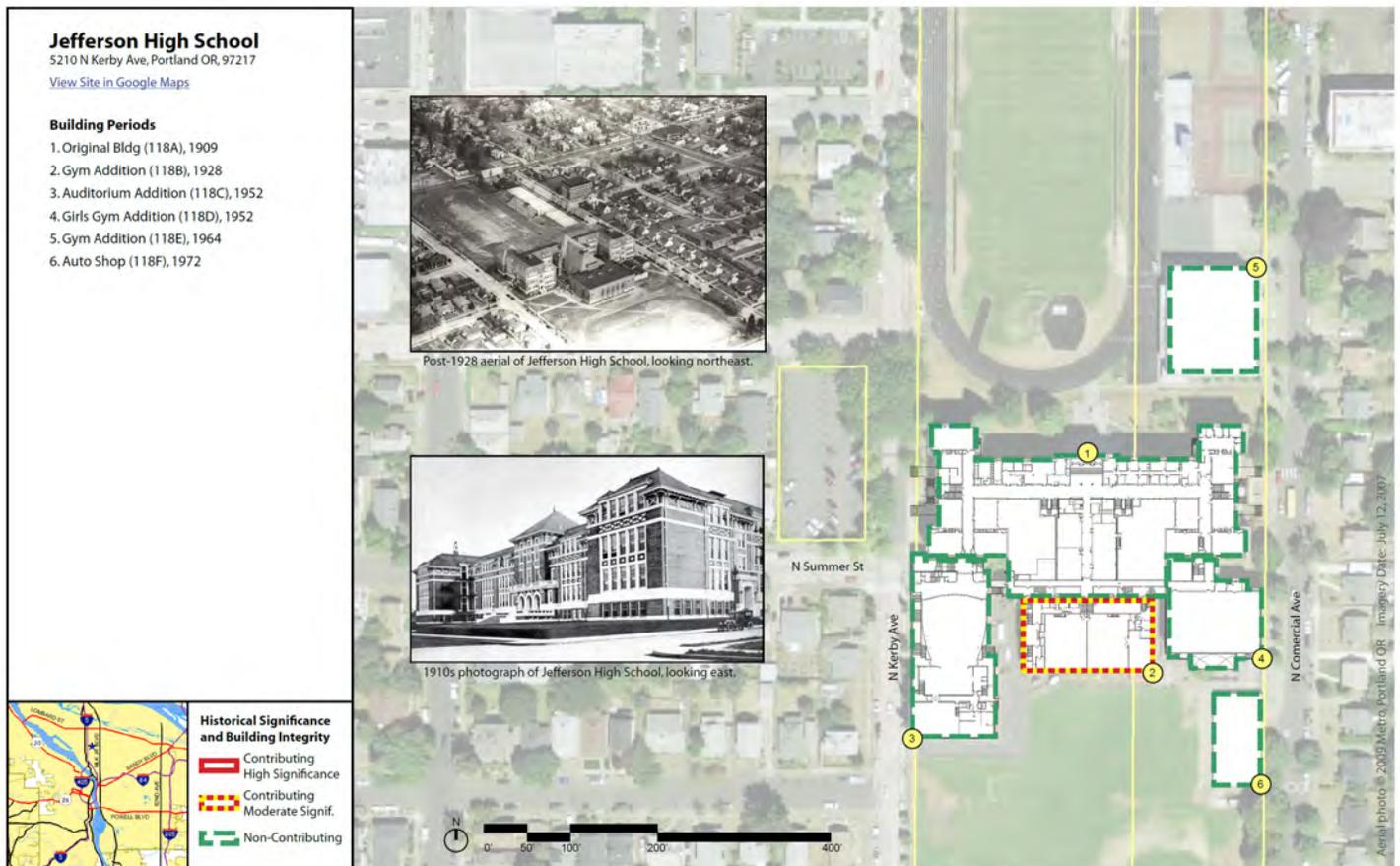
Site A is within the Piedmont Conservation District and the buildings on the site are considered “Contributing Resources”. Any major alterations to the buildings and the demolition of any building on the site will need to be reviewed through a Type III Land Use procedure through the City of Portland’s Landmarks Commission.

The City has recently adopted new updated regulations governing land use approvals for landmark resources, as well as a new process for demolition approvals that requires a 120-day waiting period after the application has been approved. While the High School will need to negotiate a new Conditional Use Master Plan for its use, a Middle School project is only required to seek a Type III Conditional Use if submitted separately. HTMS would still be reviewed by Landmarks.

The process to de-list a contributor to a conservation district is a Type II procedure, and would be reviewed by staff in the Bureau of Development Services. This course of action faces an uncertain outcome, as the applicant would be expected to meet this criterion:

1. Loss of public benefit value. Information shows that the resource does not meet the applicable criteria for historic designation review in Sections 33.846.030.D.1. and D.2.

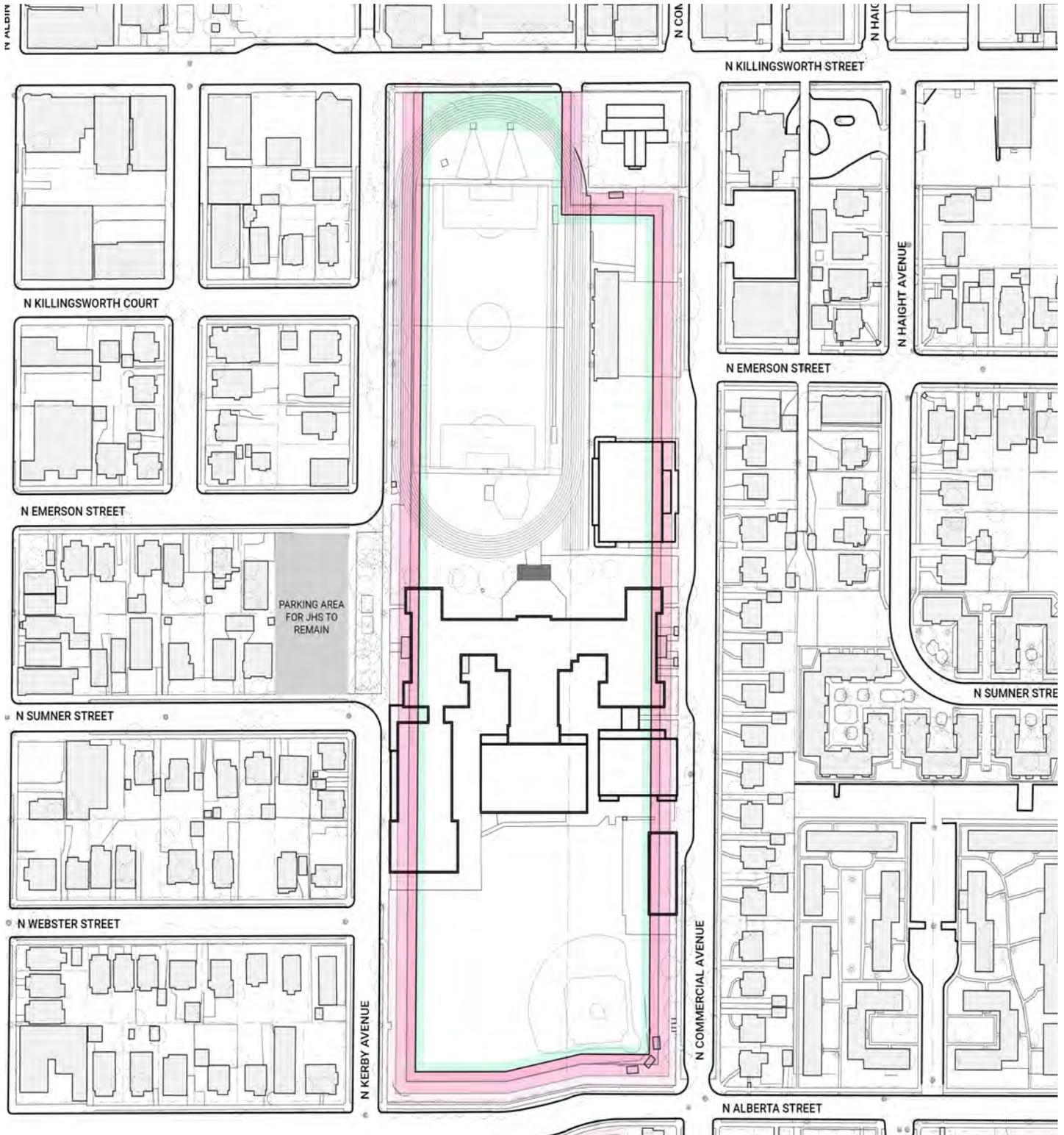
Bora’s consultant team believes this may be difficult to demonstrate since the property’s contributor status relies more on overall setting, location, and association rather than on design, workmanship, or materials.



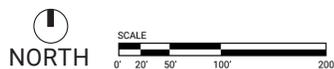
# SITE CONSIDERATIONS + ANALYSIS

## SETBACKS

### Site A - JHS Main Lot - Co-Location



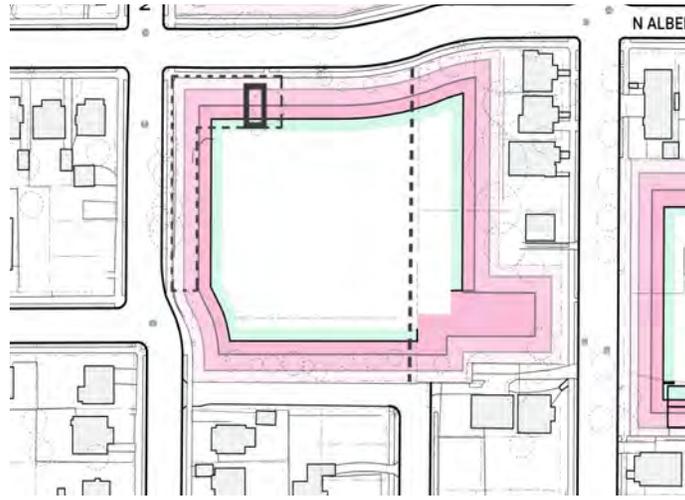
- 50' SETBACK FOR ATHLETIC FIELDS
- MIN 10' SETBACK
- 25' SETBACK FOR 50' TALL BLDG
- 37.5' SETBACK FOR 75' TALL BLDG



# SITE CONSIDERATIONS + ANALYSIS

## SETBACKS

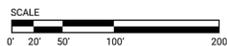
Site B



Site C



- 50' SETBACK FOR ATHLETIC FIELDS
- MIN 10' SETBACK
- 25' SETBACK FOR 50' TALL BLDG
- 37.5' SETBACK FOR 75' TALL BLDG



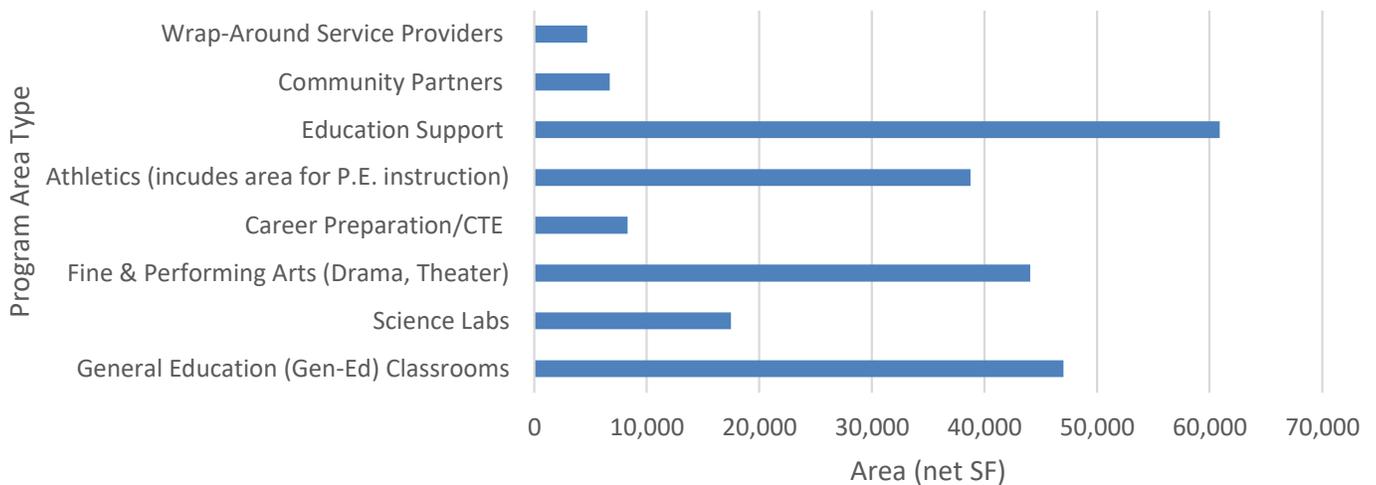
# PROGRAM ANALYSIS

## ED SPEC JHS : BASIS OF DESIGN (BASED ON 2019 STUDY EXPANDED PROGRAM) INTERIOR PROGRAM SPACES

The JHS Program was developed in 2019 during a prior study. The program is based on the 2017 PPS HS Education Specification, modified with input from various stakeholders and with the guidance of the CMPC committee. Modifications included a larger theater (1,000 seats versus the standard 500 seat auditorium), a suite of dance studios, and a larger space allocation for wrap around and partner services to accommodate SEI and Latino Network.

<https://www.pps.net/cms/lib/OR01913224/Centricity/Domain/58/PPS%20Comp%20HS%20Ed%20Specs%20September%202017.pdf>

### JHS Education Specification



#### PPS Comprehensive High School(s) Area Program

##### SUMMARY

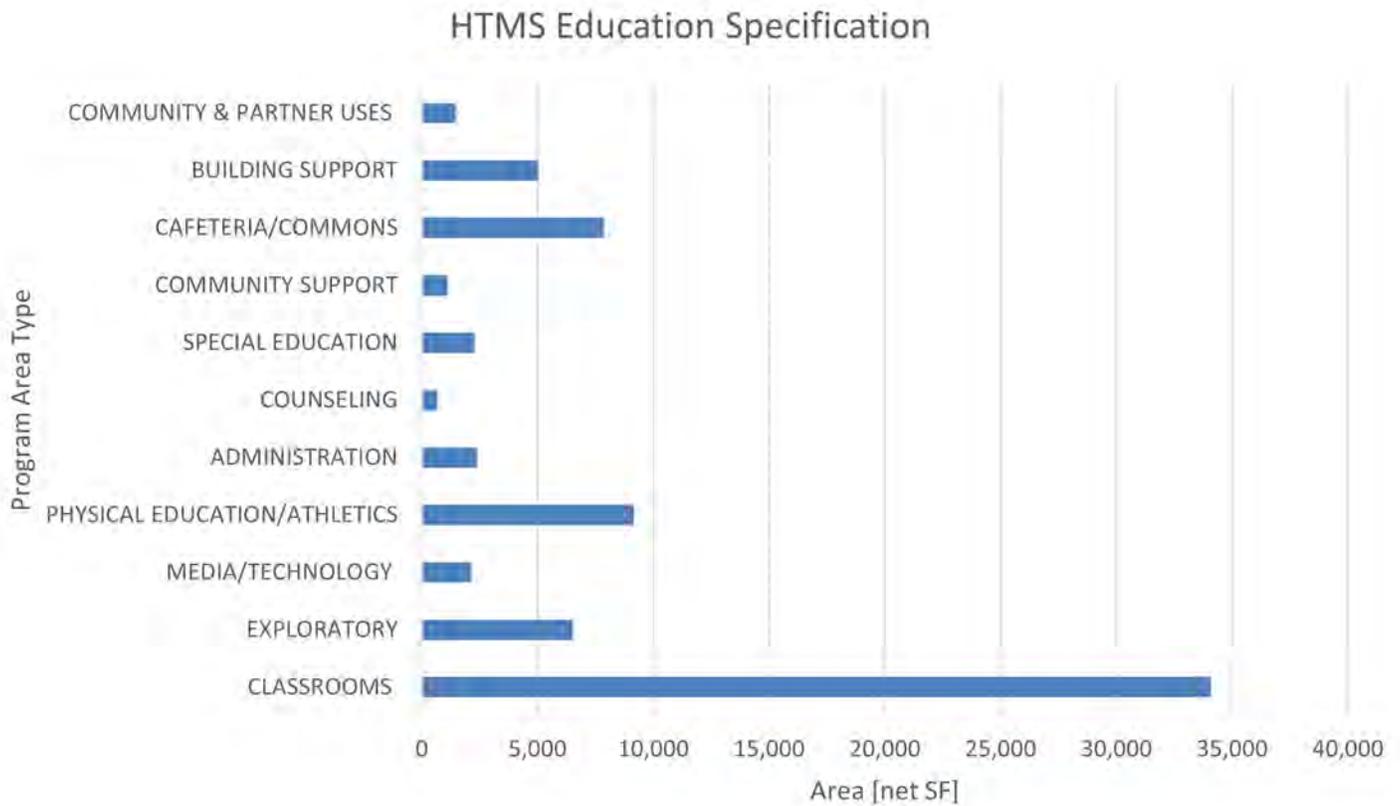
AREA	Quant.	SF Room	Total
<b>COMPREHENSIVE HIGH SCHOOL PROGRAM - TEACHING STATIONS</b>			
General Education (Gen-Ed) Classrooms	41	980 SF	53,180
Science Labs	11		17,480
Fine & Performing Arts (Drama, Theater)	4		21,150
Career Preparation/CTE	3		6,000
Athletics (includes area for P.E. instruction)	3		35,580
Education Support	2		67,400
<b>Sub-Total Recommended Teaching Stations</b>	<b>64</b>		<b>200,790</b>
Community Partners			1,200
Wrap-Around Service Providers			4,700
<b>Sub-Total</b>			<b>5,900</b>
<b>SUB-TOTAL COMPREHENSIVE HIGH SCHOOL REQUIRED AREA</b>			<b>206,690</b>
<b>Net to Gross Ratio of 36%</b>			<b>74,408</b>
<b>TOTAL COMPREHENSIVE HIGH SCHOOL REQUIRED</b>			<b>281,098</b>

#### JHS Conceptual Master Plan Program

Quant.	SF Room	Total
37	920 SF	47,040
11		17,480
4		44,070
3		8,300
3	+ fieldhouse	38,780
2		60,920
<b>60</b>		<b>216,590</b>
	inc SEI and LN	6,720
		4,700
		<b>11,420</b>
		<b>228,010</b>
	<b>36% for new</b>	<b>82,084</b>
	<b>Existing measured</b>	<b>24,316</b>
	<b>TOTAL JHS</b>	<b>334,410</b>

**PROGRAM ANALYSIS**  
**ED SPEC MS : BASIS OF DESIGN**  
**INTERIOR PROGRAM SPACES**

This area program for Harriet Tubman Middle School is based on the PPS Education Specification for Middle Schools without adjustment. The Physical Education / Athletics program summary does not include an additional 4,000 SF for covered outdoor play. Also not included are the optional auxiliary gymnasium or the optional community partner spaces.



# PROGRAM ANALYSIS

## ED SPEC MS : BASIS OF DESIGN (BASED ON 2019 STUDY EXPANDED PROGRAM) INTERIOR PROGRAM SPACES

PPS Middle School Grades 6 through 8		
<b>MIDDLE SCHOOL PROGRAM</b>		
Preferred: spaces preferred but not required or applied to area program		
AREA	Quantity	S.F. Total
<b>CLASSROOMS</b>		
<i>Subtotal required + preferred</i>		<b>34,064</b>
<b>EXPLORATORY</b>		
<i>Subtotal required + preferred</i>		<b>6,520</b>
<b>MEDIA/TECHNOLOGY</b>		
<i>Subtotal required + preferred</i>		<b>2,150</b>
<b>PHYSICAL EDUCATION/ATHLETICS</b>		
<i>Subtotal Required</i>		<b>13,160</b>
<b>ADMINISTRATION</b>		
<i>Subtotal required + preferred</i>		<b>2,390</b>
<b>COUNSELING</b>		
<i>Subtotal required + preferred</i>		<b>660</b>
<b>SPECIAL EDUCATION</b>		
<i>Subtotal required + preferred</i>		<b>2,290</b>
<b>COMMUNITY SUPPORT</b>		
<i>Subtotal REQUIRED</i>		<b>1,120</b>
<b>CAFETERIA/COMMONS</b>		
<i>Subtotal required + preferred</i>		<b>7,875</b>
<b>BUILDING SUPPORT</b>		
<i>Subtotal Required + Preferred</i>		<b>5,030</b>
<b>COMMUNITY &amp; PARTNER USES</b>		
<i>Subtotal required + preferred</i>		<b>1,470</b>
<b>PPS Middle School Grades 6 through 8</b>		
<b>MIDDLE SCHOOL PROGRAM TOTAL REQUIRED + PREFERRED AREA</b>		<b>76,729</b>
<b>Less covered play (4,000)</b>		<b>72,729</b>
<i>Net to gross ratio of 29%</i>		<b>21,091</b>
<b>MIDDLE SCHOOL PROGRAM TOTAL REQUIRED + PREFERRED AREA TOTAL</b>		<b>93,820</b>

# CONCEPT STUDIES

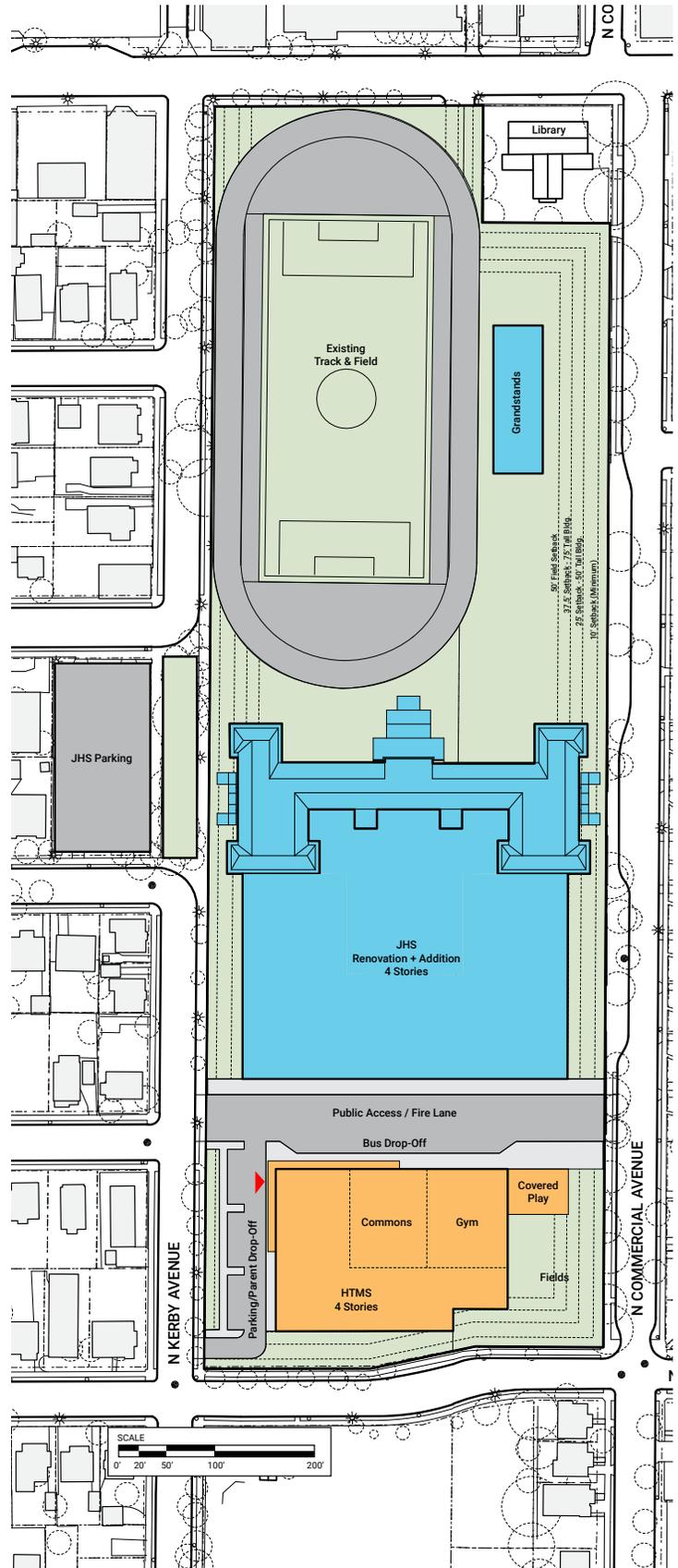
## SITE A JHS MAIN LOT - OPTION 1

Site A is the northern section portion of land currently utilized by Jefferson High School. Bounded to the north by Killingsworth Street and Alberta to its south, the site is too small to accommodate the preferred athletics programs for a high school even before the addition of a possible middle school.

Zoning requirements limit the maximum height to 75 feet, or four stories. Setbacks are required at the perimeter to ease the impact of development on the adjacent residential neighborhood, with the exception of the northern boundary, which is governed by the Main Street overlay. The existing JHS facility does not comply with setback height limitations. This site falls within the Piedmont Conservation District and development will be reviewed through the Landmarks process, including major demolition on the site.

The City may ask PPS to create a new public access through the site to mitigate the “super block” and to connect the adjacent neighborhoods. And, existing non-conforming conditions may require mitigation. The existing track and field to the northwest, while relatively recent, do not comply with the setback requirements and any proposed replacement strategy might encounter development challenges.

Two possible strategies are proposed for Site A. The first option retains the existing original 1909 structure at JHS and creates a new addition to its south. The new Middle School is then located on the southern edge of the property. This creates a dense academic campus. Both schools are negatively impacted. The high school addition has to be overly compact to achieve the required square footage to meet the Ed Specs. This results in a dense development that will lack access to natural light in many spaces and which will likely result in the gym and theater being placed internally, without easy public access directly to the neighborhood. The Middle School barely fits on the site and must be a four-story structure. There is minimal outdoor space available, and students would need to cross Alberta Street to access a large play field or walk north past the High School to access the track and field.



# CONCEPT STUDIES

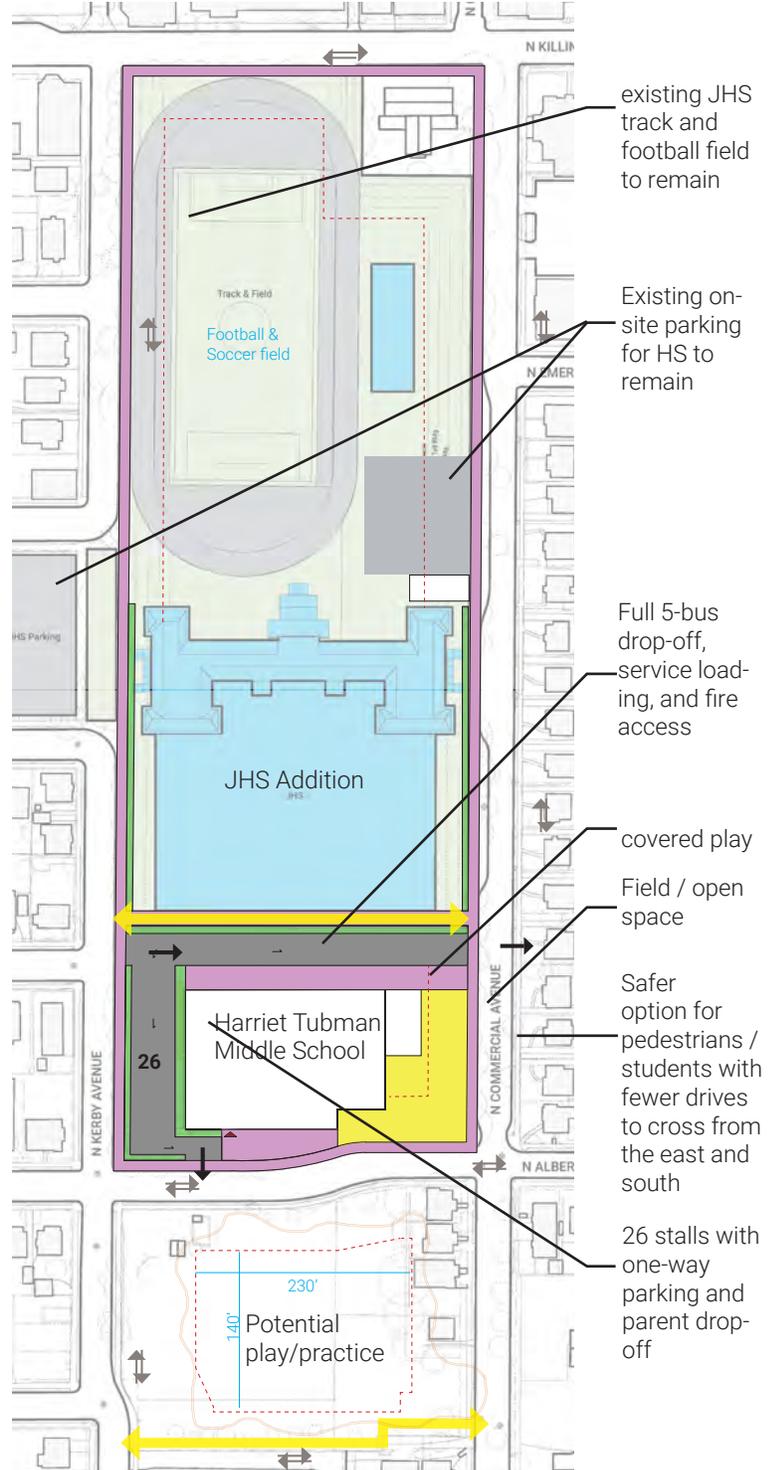
## SITE A JHS MAIN LOT - OPTION 1

### SITE PROGRAM

NOTE: bold items included in option

- **Track & Field** (JHS)
- **Football** (JHS)
- Baseball / Softball (JHS)
- Practice Field (JHS)
- Tennis Courts (JHS)
- Softball Field (MS)
- **Soccer Field** (JHS on football field)
- Play / practice for baseball, soccer, and **running trail** (running trail around south lot perimeter)
- **Covered Outdoor Play Area** (MS)
- No conflict with Site Utilities or easement
- Maintains separation of high school and middle school
- **Service Loading** (HTMS - at bus drop off)
- **Meets Setbacks** - building
- **On-Site Bus Loop** (MS - 5 buses)
- **On-Site Parent Drop-Off** (MS)
- **On-Site Parking** (MS 26 stalls)
- **Fire Access** (MS)
- Meets Setbacks - playfields to not
- **Site development aligns with neighborhood context**  
(alignment of drives to adj. streets)

### PROGRAM NOTES



# CONCEPT STUDIES

## SITE A JHS MAIN LOT - OPTION 1

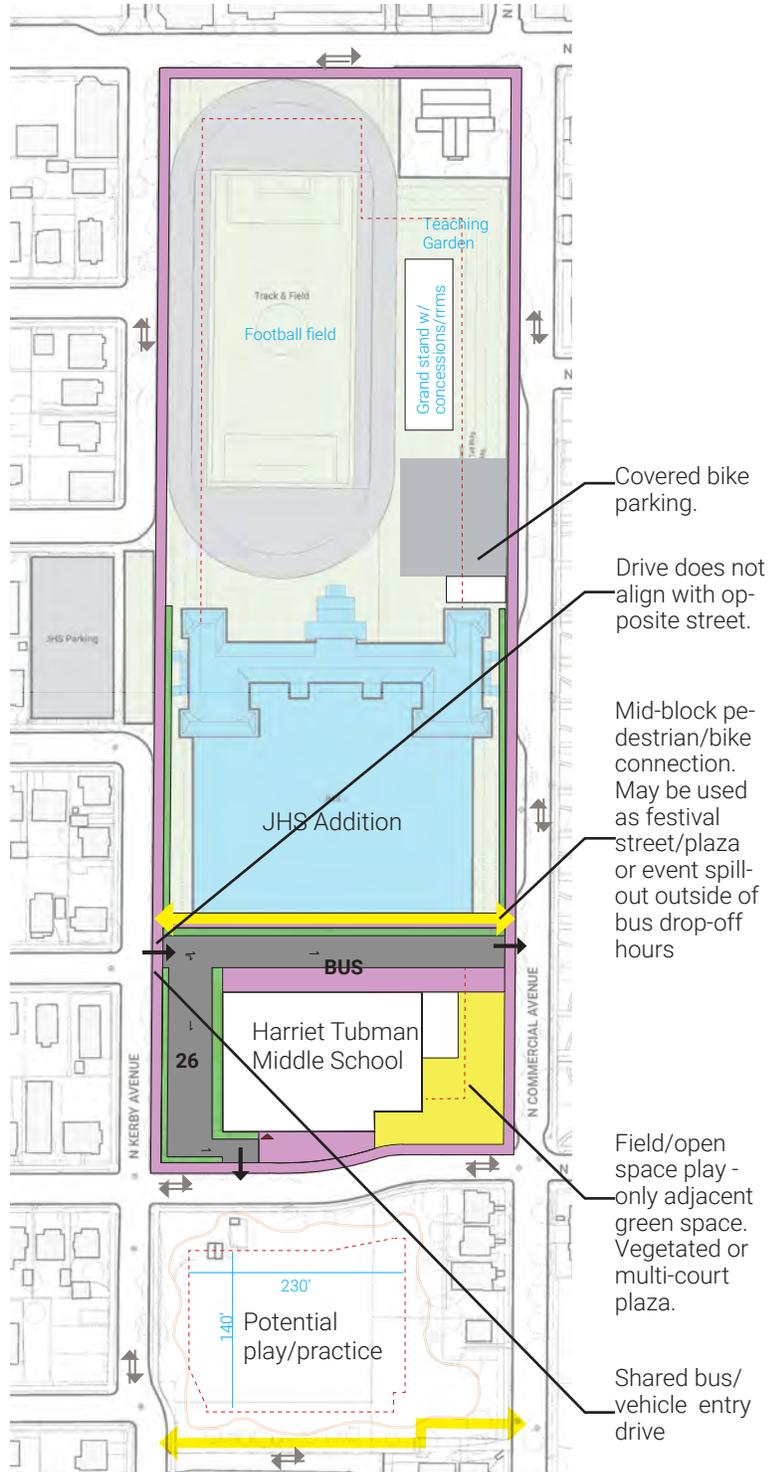
### OPPORTUNITIES

1. Midblock connection can expand outside of bus dropoff hours to become a joint plaza for both the JHS and MS. The north side is a bike/pedestrian crossing for the public and outside bus hours, the service/loading area can become event spill-out or multi-court play.
2. This option shows drop-offs on the north and west which limit students crossing vehicle drives and improves safety.
3. Exclusive use outdoor play on the east can be a play plaza with green space or a multi-court if adjacent green space is not the highest priority.

### CHALLENGES

1. On-site parking is limited with the off-street parent drop-off. If onsite parking is a higher priority, then an on-street drop-off could be sited on the west.
2. Exclusive MS outdoor space is limited to the adjacent covered and green areas at the west.
3. Driveways are difficult on this site. Distances from corners, alignment with drives and streets, and a shared bus/vehicle entry are challenging traffic issues and warrants further traffic analysis.
4. The MS has no exterior athletic fields in this option.
5. Vehicle speeds on Alberta are concerning and would likely require speed-reduction strategies.
6. The JHS new addition has not been designed; the footprints shown are current estimates. The final design may impact some of the assumed functions of the play fields and circulation.
7. Assume offsite bus dropoff for JHS will remain. Might require approval from the City.

### STUDY NOTES

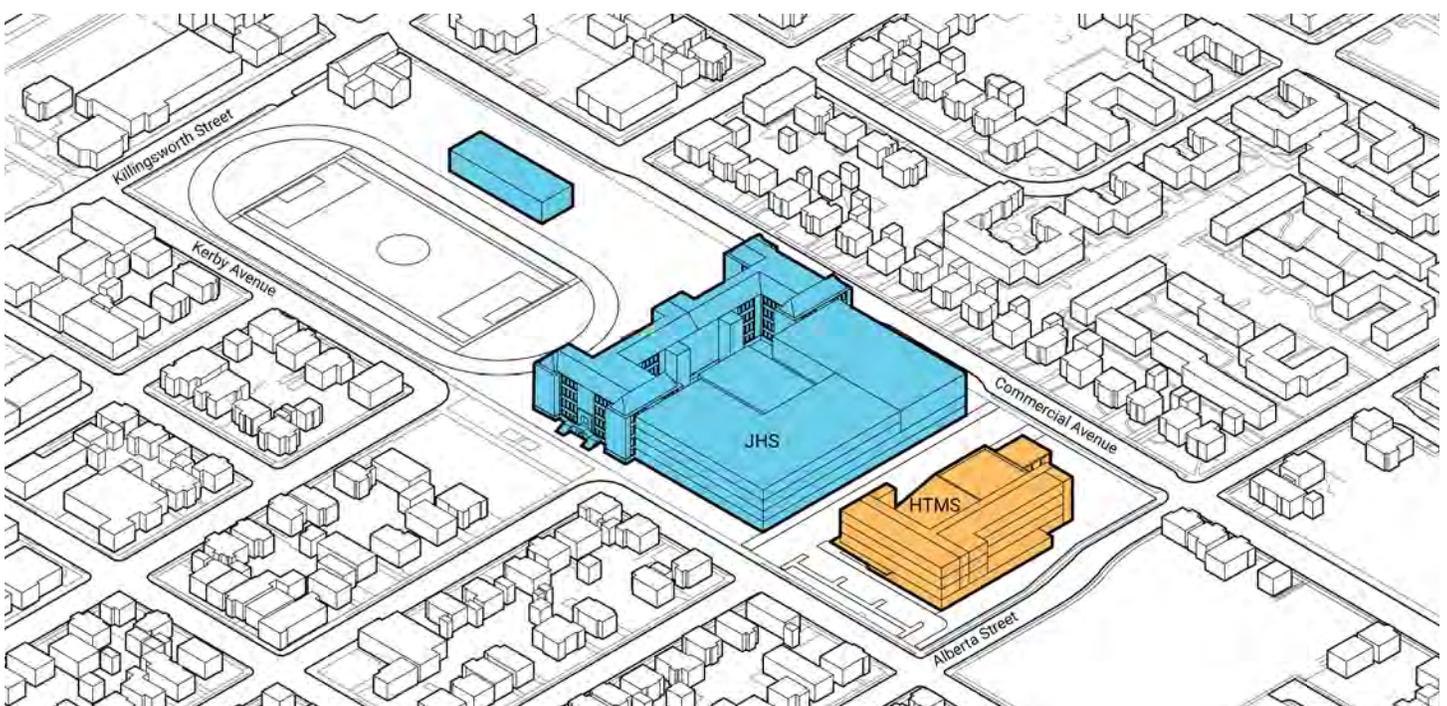
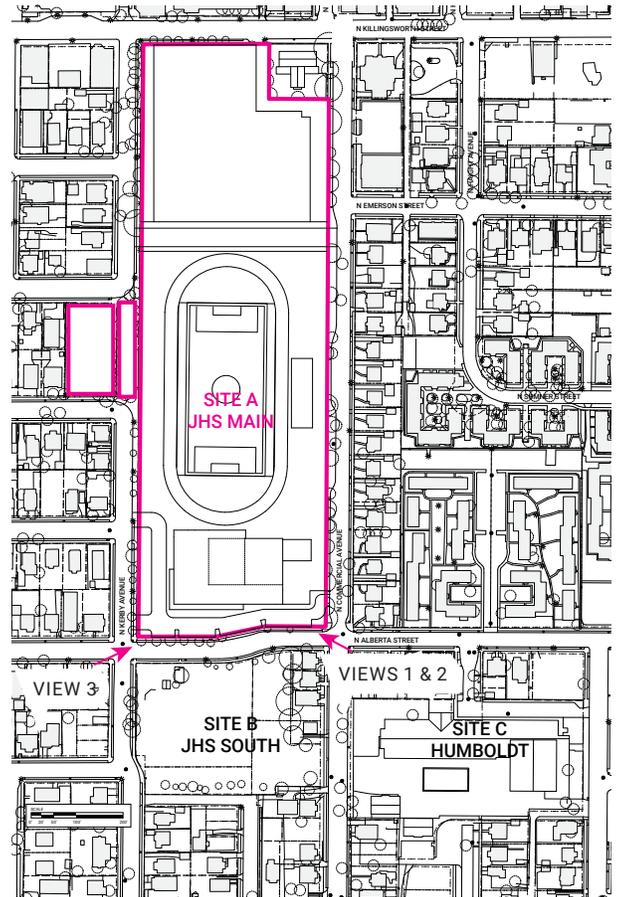


# CONCEPT STUDIES

## SITE A JHS MAIN LOT - OPTION 1

Site A - Option 1 offers many challenges including the scale and density of development within a predominantly residential neighborhood. One main advantage of this strategy is that it retains the original 1909 JHS structure, which is deeply beloved by many in the community.

However, the Middle School addition to the JHS campus seriously compromises many aspects of the high school project for both the building and the site development opportunities. And, the Middle School project itself fails to meet several of PPS's development requirements particularly around outdoor space and athletics/PE.



CONCEPT STUDIES  
SITE A JHS MAIN LOT - OPTION 1  
STREET VIEWS



VIEW 1 - ALBERTA STREET & COMMERCIAL AVENUE LOOKING WEST



VIEW 2 - ALBERTA STREET & COMMERCIAL AVENUE LOOKING NORTH



VIEW 3 - ALBERTA STREET AND KERBY AVENUE LOOKING NORTHEAST

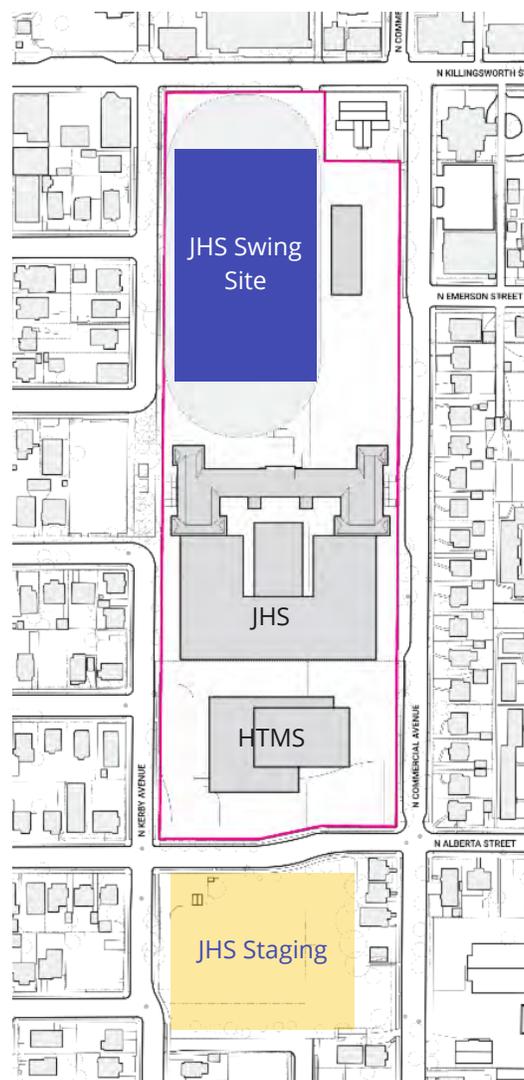
# CONCEPT STUDIES

## SITE A JHS MAIN LOT - OPTION 1

### CONSTRUCTION PHASING AND STAGING

Jefferson High School students are currently planned to be accommodated on site during construction. In Option 1, with the retention of the historic structure, students will be relocated to a temporary school that will be located somewhere on the JHS property. The construction of both schools will require a laydown area for construction activities. The following considerations emerge for this option:

1. With HTMS to the south of the JHS project, the construction staging area will probably be the lot south of Alberta Street. This was previously identified as the swing site for JHS students, but would likely also become the construction staging area for JHS.
2. JHS students would need to be accommodated on the current track and field location. This would result in additional costs to the JHS project for repair/reconstruction of the track after JHS is reoccupied.
3. Construction of JHS would need to occur in a single phase, and the possible retention of the existing theater in a phased development scenario is no longer a viable option.
4. Construction activities for JHS would have a significant negative impact on the operation of the HTMS if it were to open before the completion of the High School project.
5. Schedule and budget for JHS are likely to be negatively impacted if delivering HTMS is the schedule



# CONCEPT STUDIES

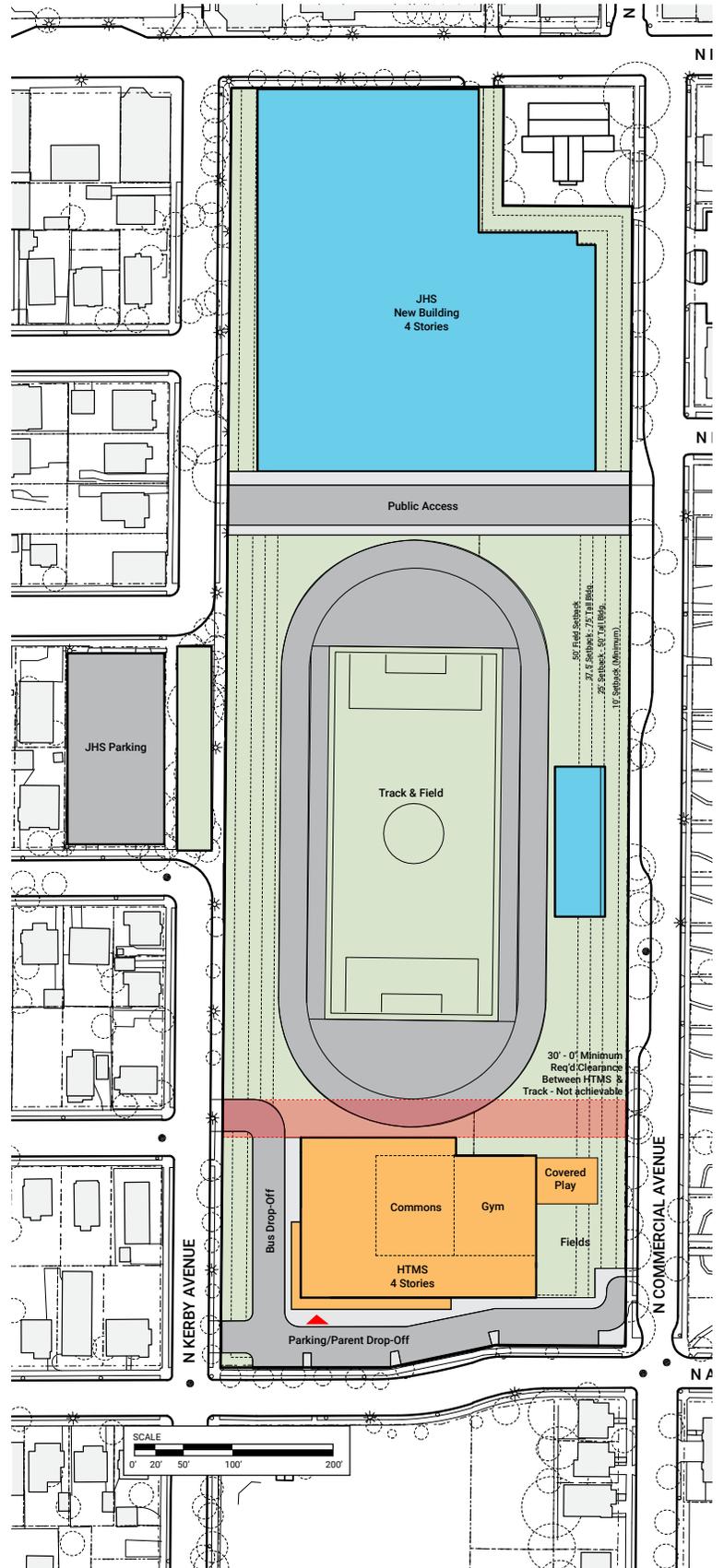
## SITE A JHS MAIN LOT - OPTION 2

The second option for Site A studies the development of a new High School to the north and keeps the new Middle School to the south. Again, both schools are negatively impacted. The new High School, as with Option 1, has to be overly compact to achieve the required square footage to meet the Ed Specs. This results in a dense development that will lack access to natural light in many spaces, and which will likely result in the gym and theater being placed internally without easy public access directly to the neighborhood.

The 75' tall, four-story building will be directly located on North Killingsworth Street. While this is a neighborhood commercial district, the school will be the largest building on the street and there will be significant design challenges to maintain the most efficient footprint possible while mitigating the impact of the new structure on the street and especially on the diminutive and historic North Portland library.

The Middle School barely fits on the site and must be a four-story structure. There is minimal outdoor space available, and students would need to cross Alberta Street to access a play field. With a new JHS building to the north, a new track and field will need to be relocated to the south of the new high school. Public access/fire lane across the site on both north and south side of the new track and field is likely required to meet City code and free access.

A new track and field and a new middle school south of a new JHS building does not fit on the site and making this option unviable.



# CONCEPT STUDIES

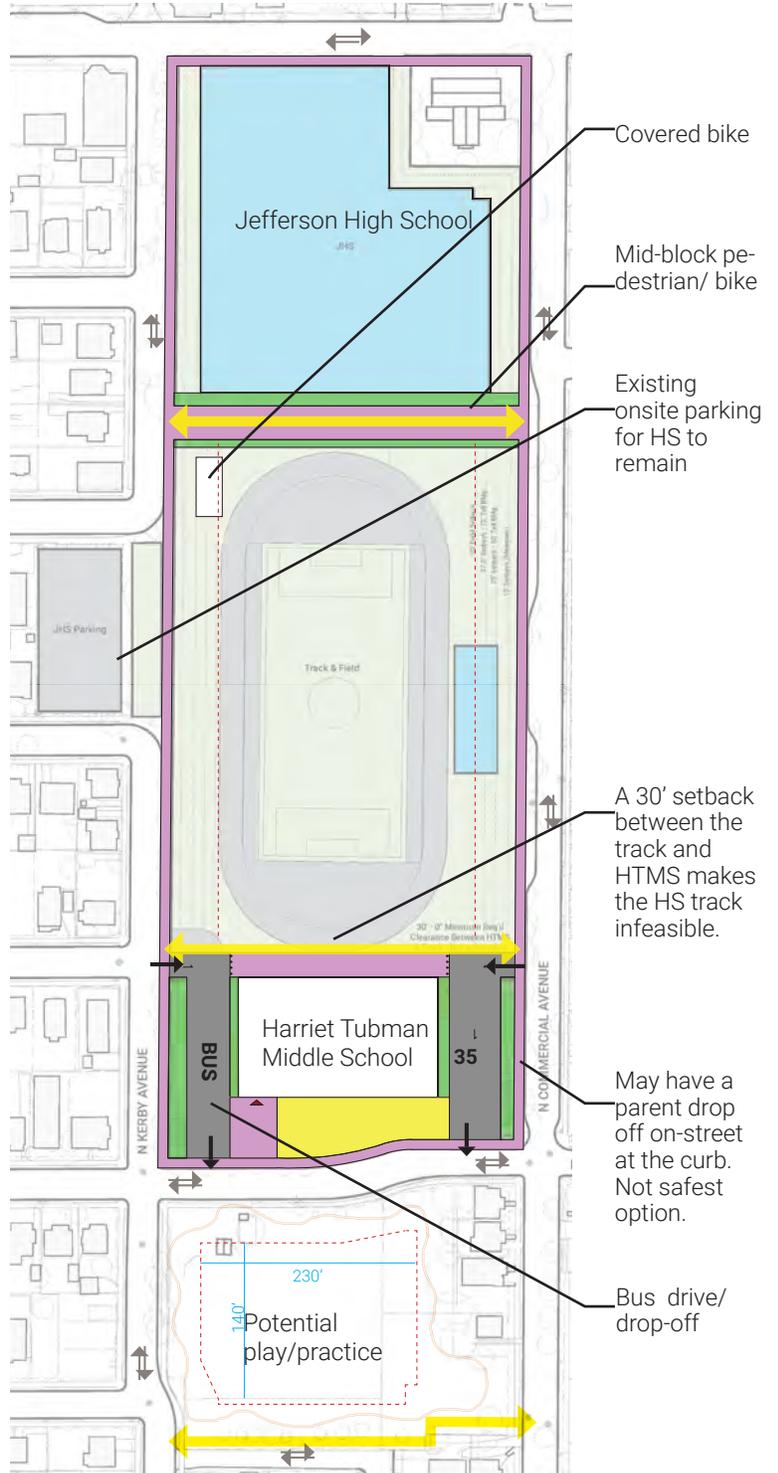
## SITE A JHS MAIN LOT - OPTION 2

### SITE PROGRAM

NOTE: bold items included in option

- **Track & Field (JHS)** - full track does not fit due to building setback requirements
- **Football (JHS)**
- Baseball / Softball (JHS)
- Practice Field (JHS)
- Tennis Courts (JHS)
- Softball Field (MS)
- Soccer Field (JHS on football field)
- Play / practice for baseball, soccer, and **running trail** (running trail around south lot perimeter)
- Covered Outdoor Play Area (MS)
- No conflict with Site Utilities or easement
- Maintains separation of high school and middle school
- **Service Loading** (HTMS - at bus drop off)
- **Meets Setbacks** - building
- **On-Site Bus Loop** (MS - 5 buses)
- **On-Site Parent Drop-Off** (MS)
- **On-Site Parking** (MS 35 stalls)
- **Fire Access**
- Meets Setbacks - playfields to not
- **Site development aligns with neighborhood context**  
(alignment of drives to adj. streets)

### PROGRAM NOTES



--- 50' playfield setback  
 ←→ Midblock crossing

# PLACE

# CONCEPT STUDIES

## SITE A JHS MAIN LOT - OPTION 2

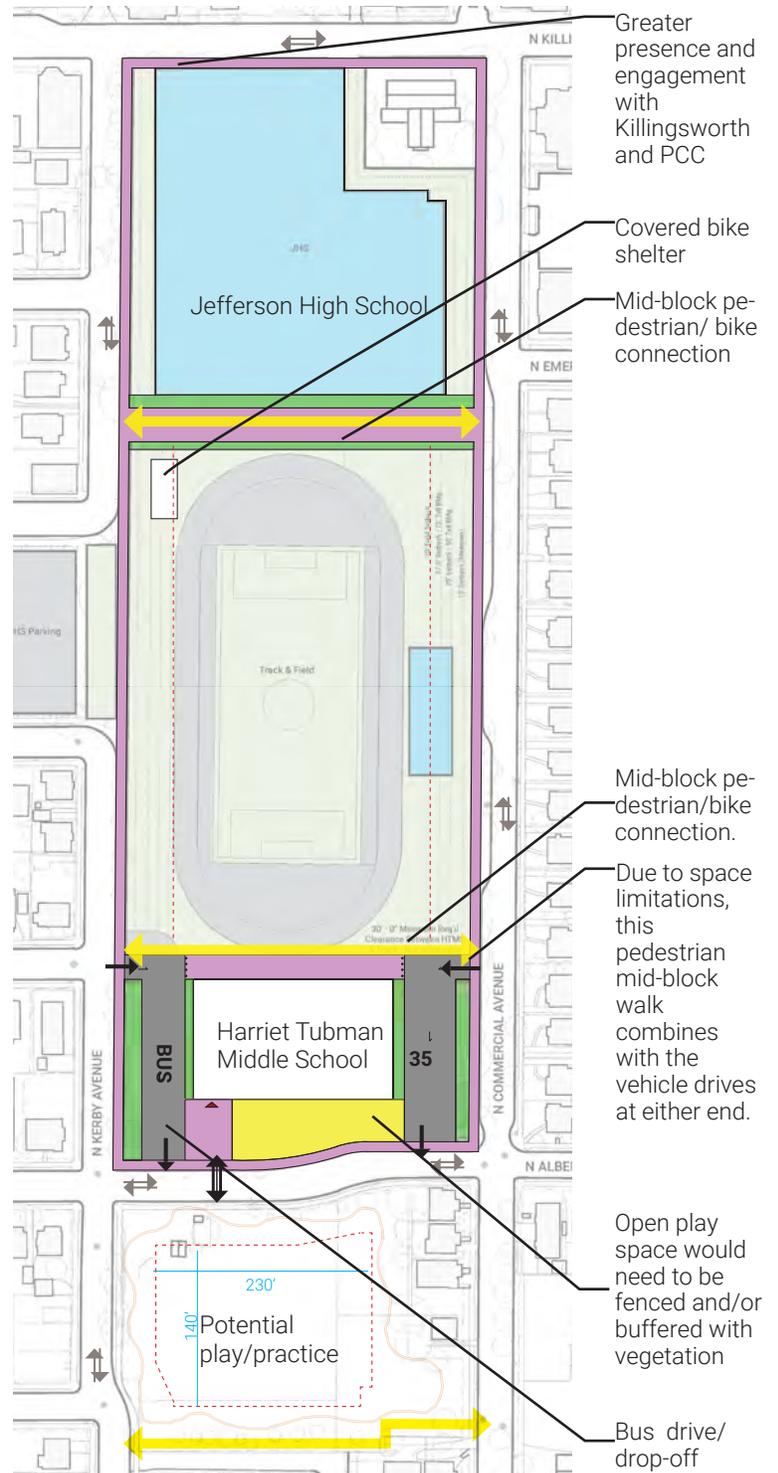
### OPPORTUNITIES

1. Jefferson High School's new identity at Killingsworth could be engaging and offer a new brand and community connection.
2. Two mid-block connections for the public is offered to break up the current super block.
3. Retention of mature trees in the South Lot.

### CHALLENGES

1. Building setbacks would eliminate track. With playfield setbacks, softball and baseball would also be eliminated. Soccer would be shared with the football field for the HS. MS may need City negotiations to get a U12 field north of the MS.
2. On-site parking and bus loops use the bike/pedestrian midblock crossing for their entry/exit. This is not the safest option. The parent drop off is eliminated due to space. A small, two-car drop-off on-street could be sited on the west.
3. Vehicle speeds on Alberta are concerning and would likely require speed-reduction strategies.
4. The JHS new addition has not been designed; the footprints shown are current estimates. The final design may impact some of the assumed functions of the play fields and circulation.

### STUDY NOTES



--- 50' playfield setback  
 ←→ Midblock crossing

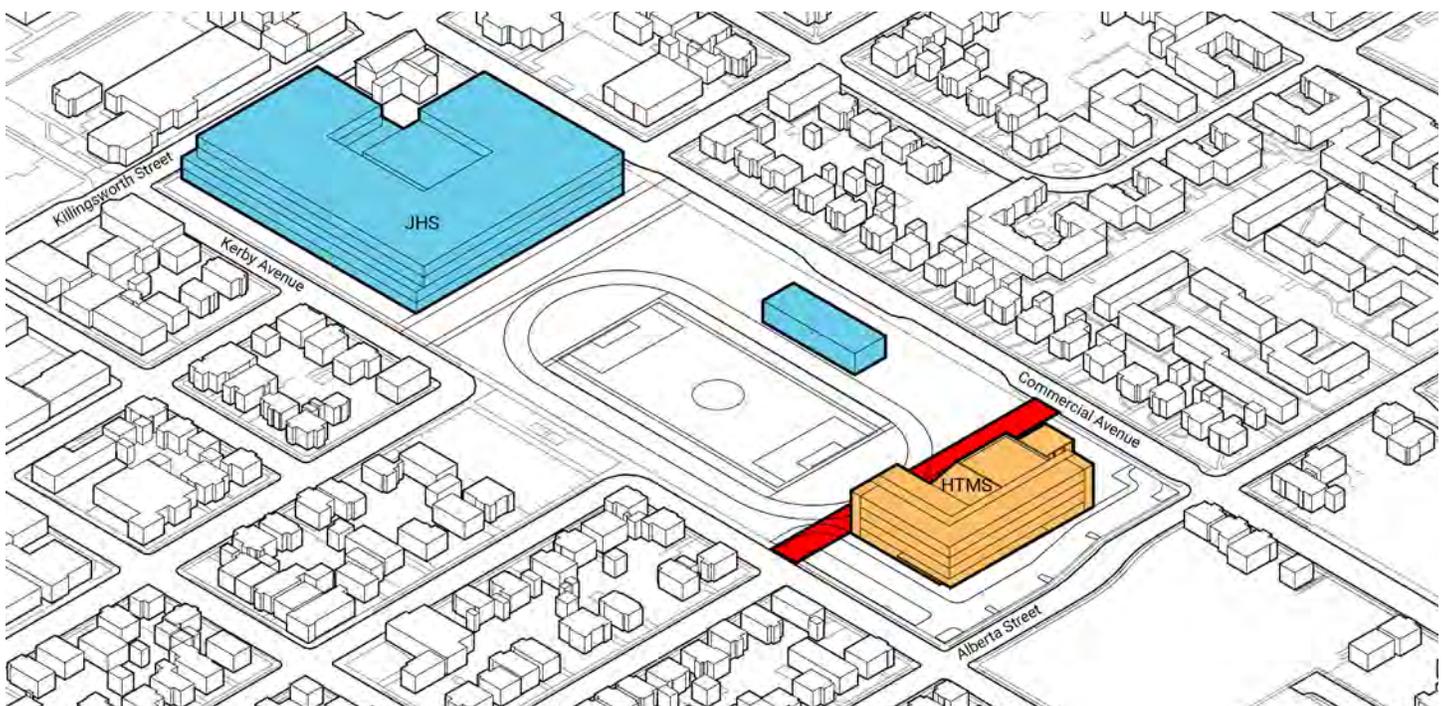
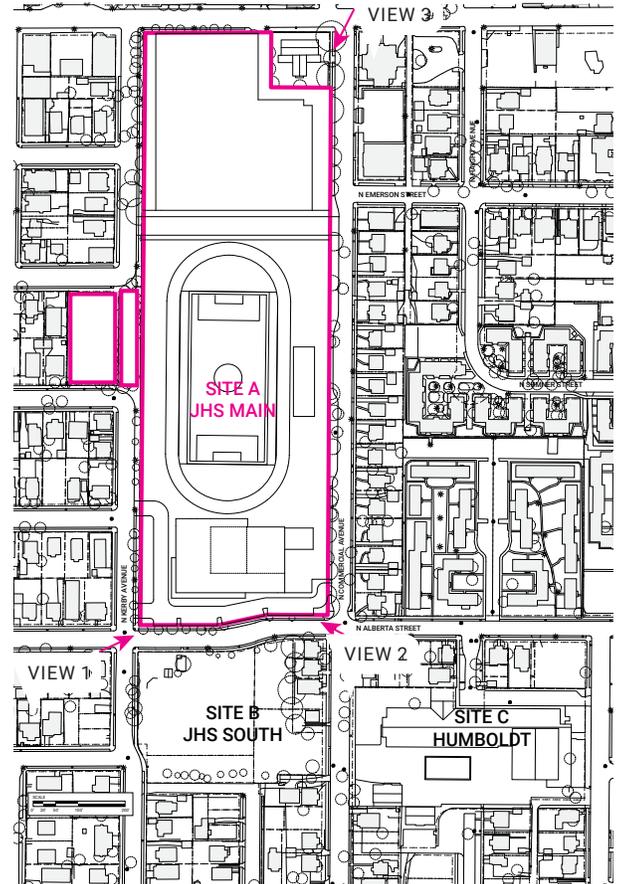
# PLACE

# CONCEPT STUDIES

## SITE A JHS MAIN LOT - OPTION 2

Site A - Option 2 also brings the added complexity to the JHS project of the required removal of the original 1909 structure. The current planning work underway for JHS with the Comprehensive Planning Committee has not yet begun to consider this topic, which has the potential to be a lightning rod in the community. The JHS study will ask the CPC to think through the pros and cons of retaining the existing building in late summer of this year.

As with Option A.1, the Middle School addition to the JHS campus seriously compromises many aspects of the High School project for both the building and the site development opportunities. And, the Middle School project itself fails to meet several of PPS's development requirements particularly around outdoor space and athletics/PE.



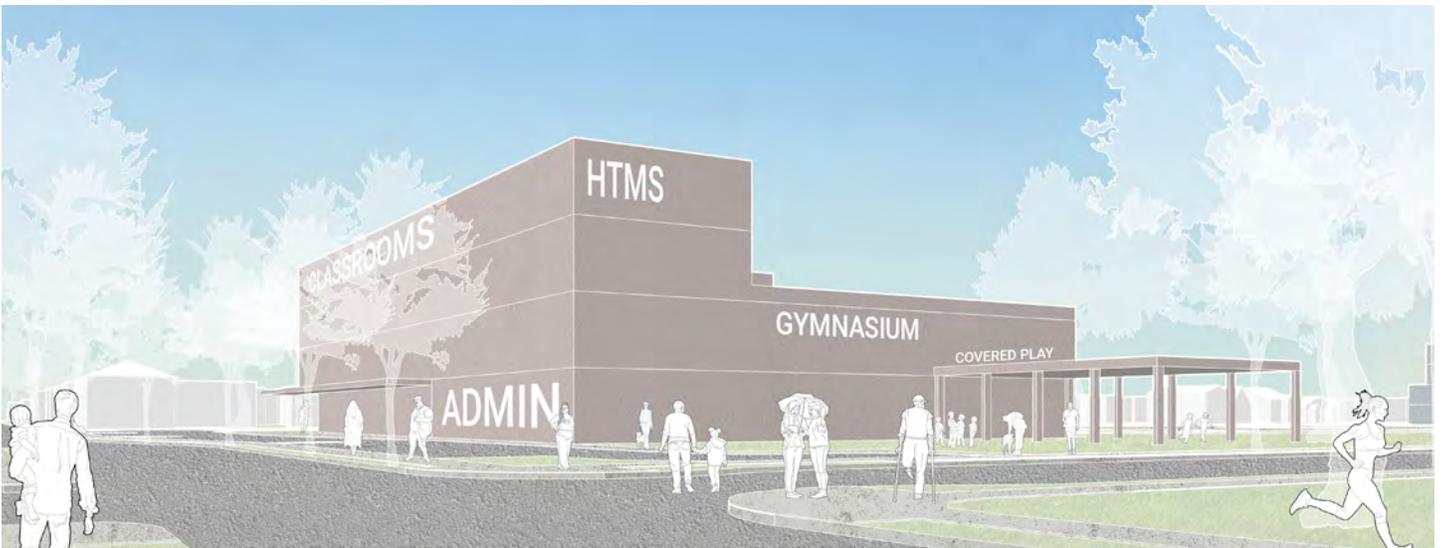
# CONCEPT STUDIES

## SITE A JHS MAIN LOT - OPTION 2

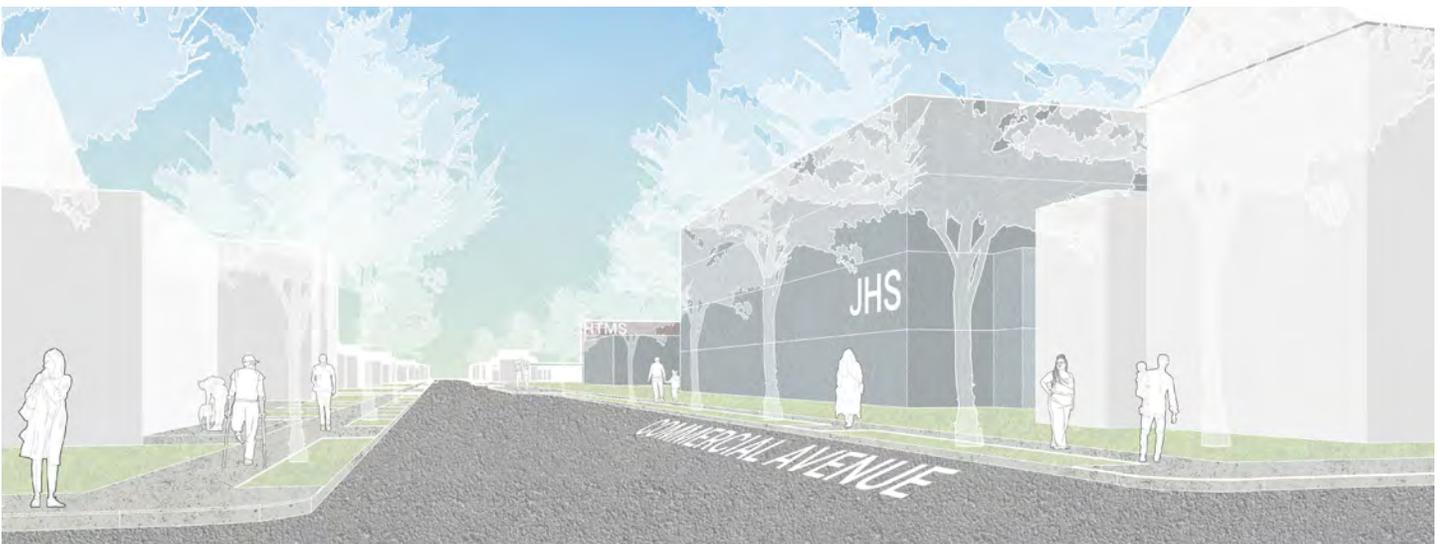
### STREET VIEWS



VIEW 1 - ALBERTA STREET & KERBY AVENUE LOOKING EAST



VIEW 2 - ALBERTA STREET & COMMERCIAL AVENUE LOOKING WEST



VIEW 3 - KILLINGSWORTH STREET & COMMERCIAL AVENUE LOOKING SOUTH

# CONCEPT STUDIES

## SITE A JHS MAIN LOT - OPTION 2

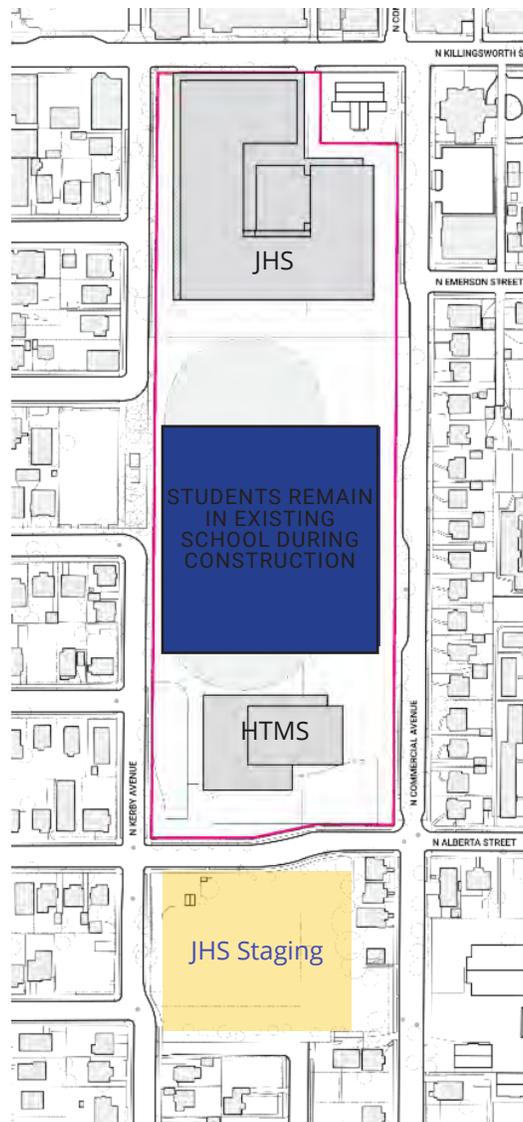
### CONSTRUCTION PHASING AND STAGING

Jefferson High School students are currently planned to be accommodated on site during construction. In Option A.2, with the replacement of the historic structure, JHS students could potentially remain in the existing buildings during the construction of the new school. The construction of both schools will require a laydown area for construction activities. The following considerations emerge for this option:

With HTMS to the south of the JHS project, the construction staging area will probably be the lot south of Alberta Street. If JHS students stay in the old school during construction of the new facility, this site would serve as construction staging for both projects.

Construction activities for JHS would have a significant negative impact on the operation of the HTMS if it were to open before the completion of the High School project

Schedule and budget for JHS are likely to be negatively impacted if delivering HTMS is the schedule priority. The presence of a functioning Middle School on the JHS site during construction will present safety and operational concerns for both the Middle School and the High School



# CONCEPT STUDIES

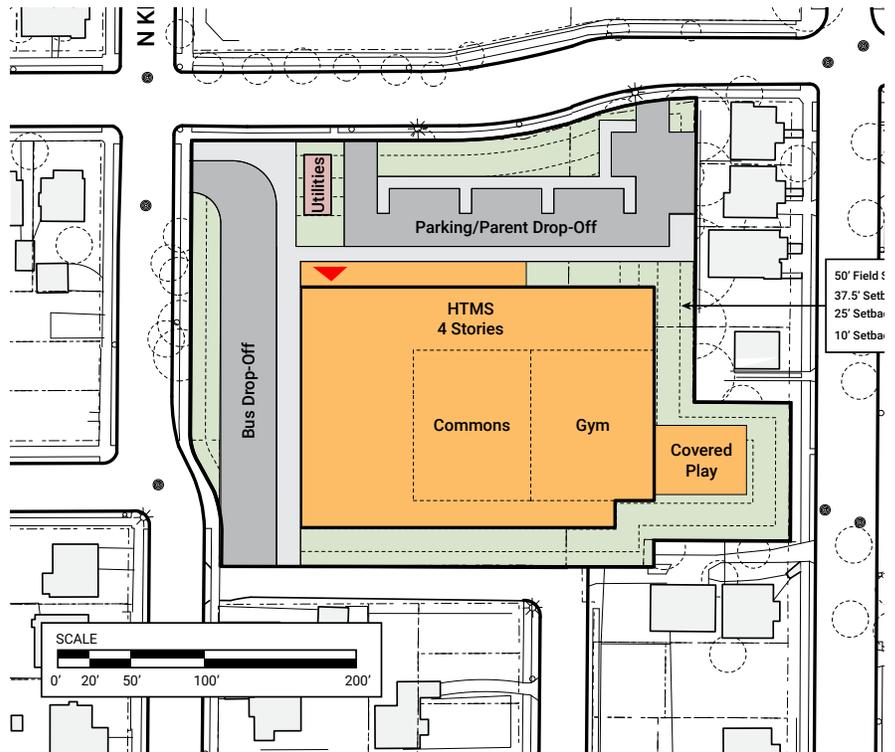
## SITE B JHS SOUTH LOT

The South Lot of the Jefferson High School campus is currently underutilized but provides additional outdoor space for athletics for the high school. The site is separated from the main high school campus by the busy Alberta Street. To the west it is bounded by North Kerby Street, and to the east by North Commercial Street. A vacated street, Haight, terminates on its southern boundary, and several single family residences are located on its northeastern corner. This site is likely too small to accommodate high school baseball and may be adequate for softball, although required setbacks for athletic fields may need to be adjusted.

As previously discussed, this site is encumbered with several utility easements which effect the entire western frontage and a portion of the northwest. Two above grade structures are evident: a fenced gas utility compound and a small shed structure. These will negatively influence site development and the appearance of the property unless PPS is able to negotiate a termination of the easement.

Also, a sanitary sewer that connects North Congress Avenue to North Alberta Street would need to be relocated for this site to be viable.

The site itself is almost too small to be viable for a Middle School of this size. The building would need to be four stories tall to accommodate the full program, and it is likely that some spaces in the building would not have good access to natural light as a result of the footprint compression. A building of this scale in a predominantly residential neighborhood is not ideal.



The restricted site is adequately sized to provide a covered play area, but other outdoor spaces are severely compromised and underprovided. On-site bus and parent drop off is achievable, as is staff parking, but this leaves little space for any other site amenities.

# CONCEPT STUDIES

## SITE B JHS SOUTH LOT

### SITE PROGRAM

NOTE: bold items included in option

- **Track & Field** (JHS)
- **Football** (JHS)
- Baseball / Softball (JHS)
- Practice Field (JHS)
- Tennis Courts (JHS)
- Softball Field (MS)
- **Soccer Field** (JHS on football field)
- Play / practice for baseball, soccer, and running trail (running trail around south lot perimeter)
- **Covered Outdoor Play Area** (MS)
- No known conflict with Site Utility easement
- **Maintains separation of high school and middle school**
- **Loading** (JHS)
- Meets Setbacks - building
- **On-Site Bus Loop** (MS - 5 buses)
- **On-Site Parent Drop-Off** (MS)
- **On-Site Parking** (MS 35 stalls)
- **Fire Access**
- **Meets Setbacks - site**
- **Site development aligns with neighborhood context**

### PROGRAM NOTES



# CONCEPT STUDIES

## SITE B JHS SOUTH LOT

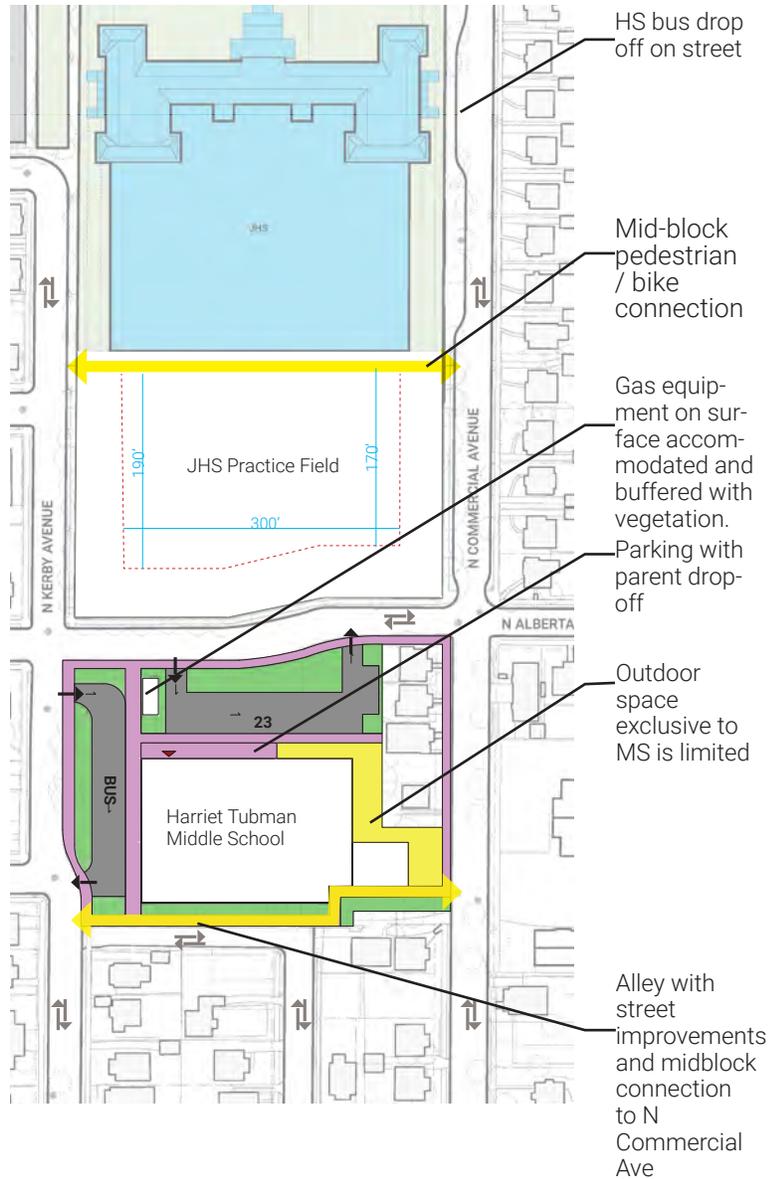
### OPPORTUNITIES

1. Two midblock crossings are possible in this option. One south of the new JHS addition and the alley improvement along the south property line.
2. Parking, parent drop-off, and bus drop off are all accommodated.

### CHALLENGES

1. Setbacks for playfields limit how the JHS playfield can be used and the MS has no outdoor athletic fields.
2. Sewer relocation costs
3. Accommodation of existing gas equipment/easement
4. Bus drop off exit is too close to the intersection of Kerby and Alberta and would have to be negotiated with the City.
5. No athletic fields for HTMS on site
6. Vehicle speeds on Alberta are concerning and would likely require speed-reduction strategies.
7. This JHS new addition has not been designed; the footprints shown are current estimates. The final design may impact some of the assumed functions of the play fields and circulation.

### STUDY NOTES

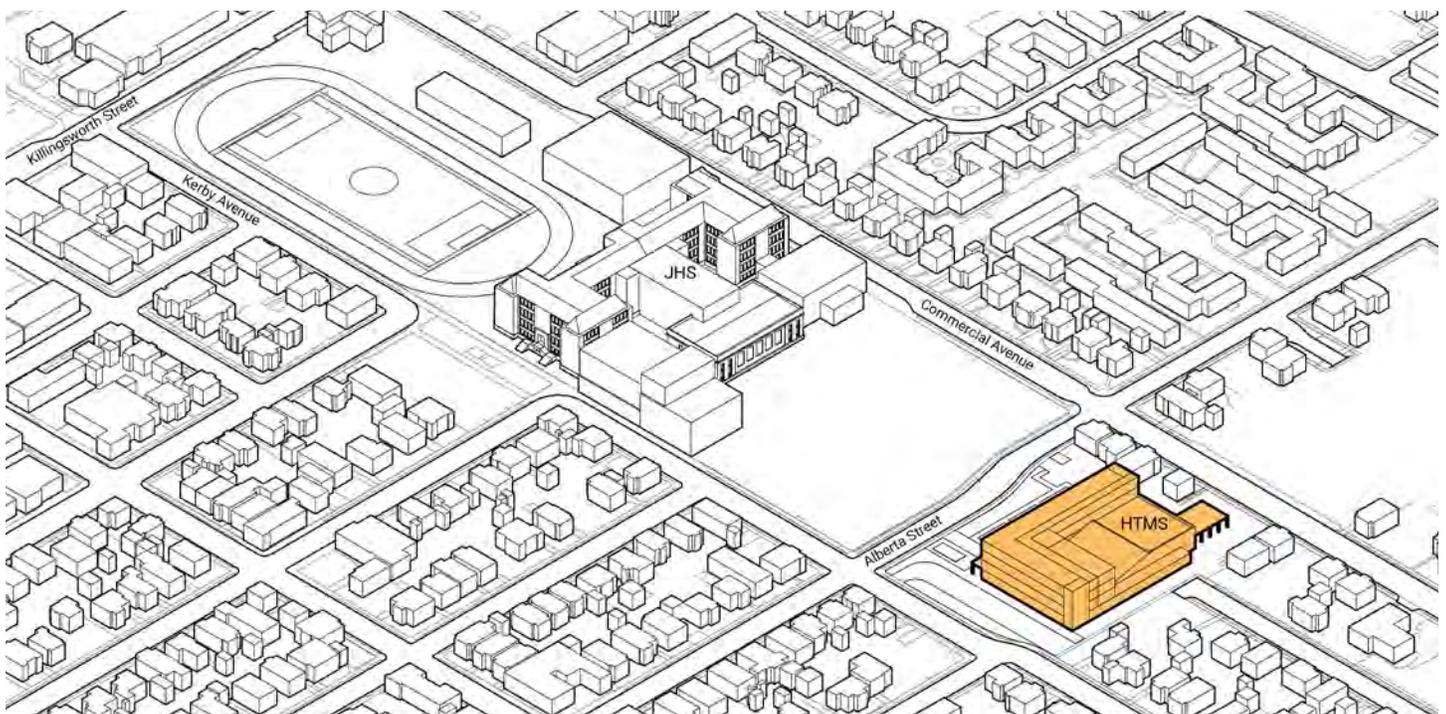
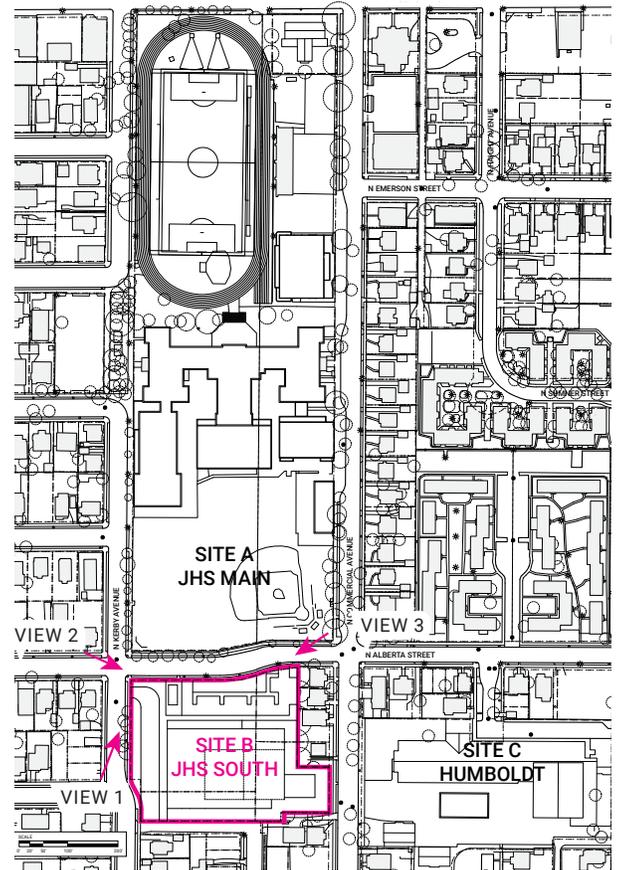


# CONCEPT STUDIES

## SITE B JHS SOUTH LOT

Development of the South Lot has a negative impact on the Jefferson High School project. The loss of this outdoor space may compromise athletic fields provisions. Most likely, the south lot would be developed to provide JHS with a soccer practice field. JHS's athletics programs are unlikely to be fully accommodated on the site even prior to this additional loss of space.

Loss of site space and the need to maximize what site is available for athletics at JHS will likely have negative outcomes for the design of the modernized high school. Its footprint will need to be ultra-compact and will face many of the same concerns outlined for Site A, including loss of natural light to academic spaces, as well as loss of direct community access to the gym and theater spaces.



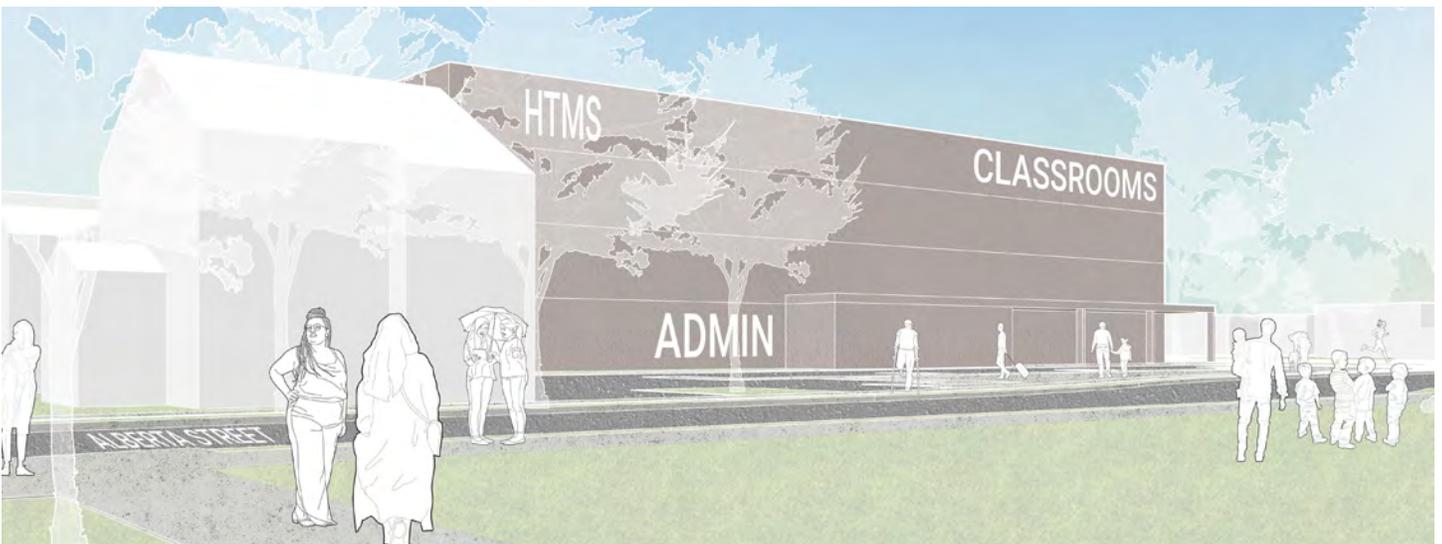
CONCEPT STUDIES  
SITE B JHS SOUTH LOT  
STREET VIEWS



VIEW 1 - KERBY AVENUE LOOKING NORTH



VIEW 2 - ALBERTA STREET & KERBY AVENUE LOOKING SOUTHEAST



VIEW 3 - ALBERTA STREET AND COMMERCIAL AVENUE LOOKING

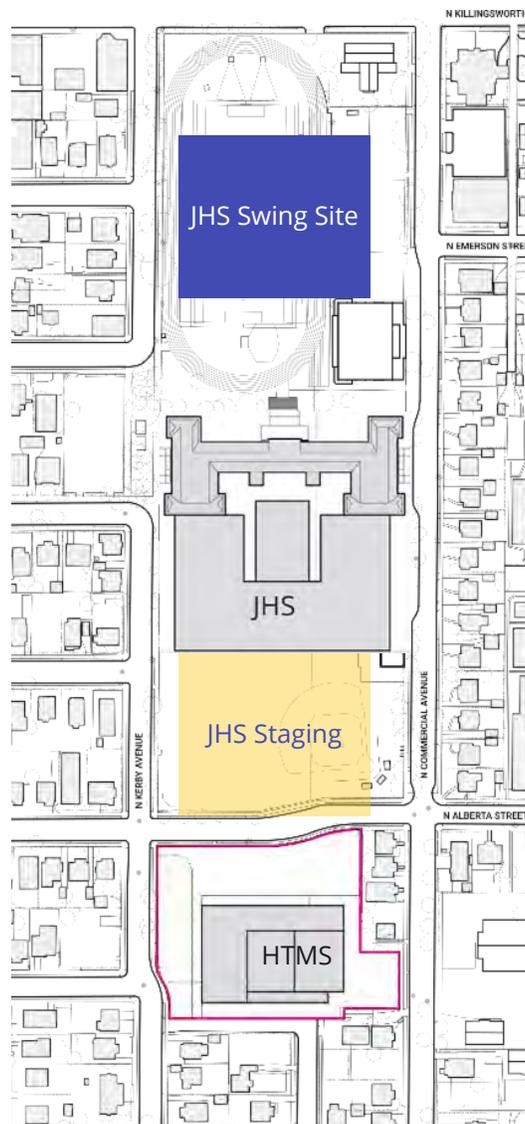
# CONCEPT STUDIES

## SITE B JHS SOUTH LOT

### CONSTRUCTION PHASING AND STAGING

Assuming that construction for the Middle School takes precedence, it seems likely that construction staging would occur south of the existing high school on the north side of Alberta. This means that the High School project would probably be delayed, and its staging would be in the same location. The proposed site for temporary structures for JHS students has been lost to the Middle School, and students would probably need to be accommodated in portable structures placed on the existing track and field. This would require a reconstruction of those site amenities and a probable delay in the completion date for the High School.

One advantage of this site organization is that HTMS students will be less impacted by construction of the High School.



# CONCEPT STUDIES

## SITE 3 HUMBOLDT

Site C is the location of the former Humboldt Elementary School, which is now leased to KairosPDX, a K-5 charter school. While owned by PPS, this site is subject to a long term lease agreement.

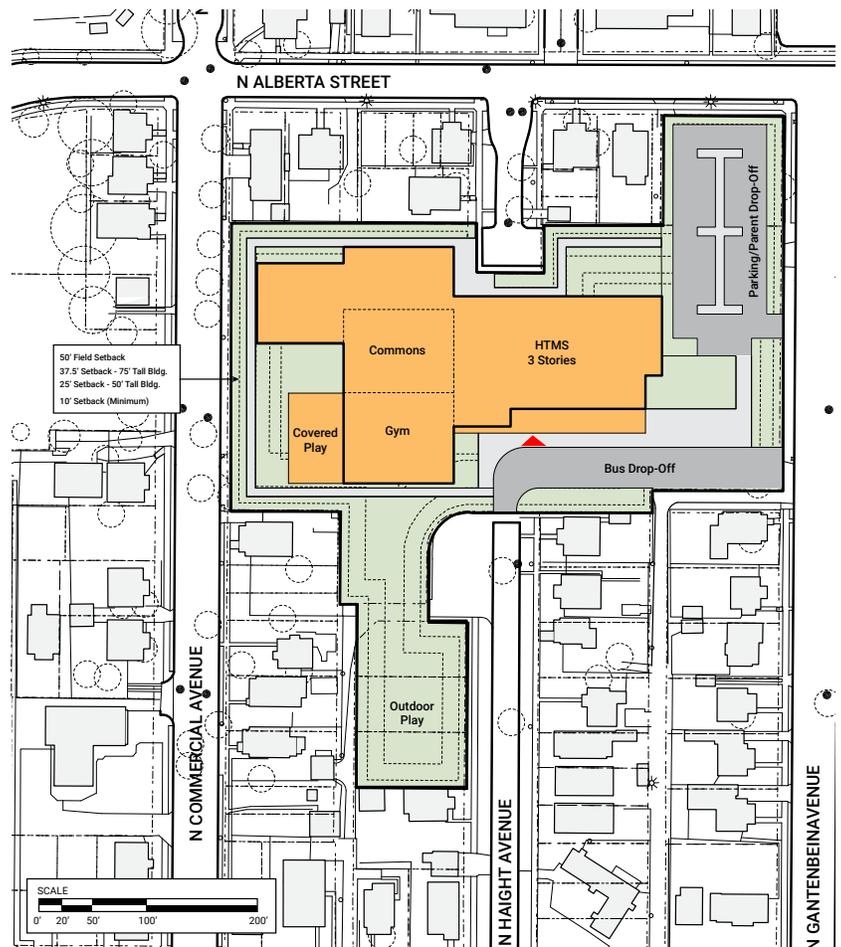
The development of Site C for a new Middle School has little impact on the Jefferson HS project. The site is still significantly smaller than is ideal for a Middle School, but it is larger than either Site A or Site B. As a result, development on this property could be at the preferred three stories rather than the four-story structures required on the other sites due to space limitations.

A three-story Middle School is likely better for school functionality as students travel between classes, and it is also less visually burdensome on its neighbors. The school is a slightly further distance from JHS. It has a little site for its own playing fields, as well as the covered outdoor play that is shown for all options. The larger site will also result in a school that has more natural light to all its spaces.

This project has adequate space for parent drop off, bus drop off, as well as staff parking. It is not large enough to provide the full suite of outdoor athletic spaces that are preferred for a Middle School.

A thriving community garden on the northeast corner of the Humboldt site may be lost due to site needs of the new structure, but it may be possible to integrate community gardens into the landscape design if this is of interest to PPS.

It is possible that the City of Portland may want to reinstate Haight Street as a public access through the site to improve neighborhood connectivity. This would need to be a point of discussion with the City for further clarity.



# CONCEPT STUDIES

## SITE 3 HUMBOLDT

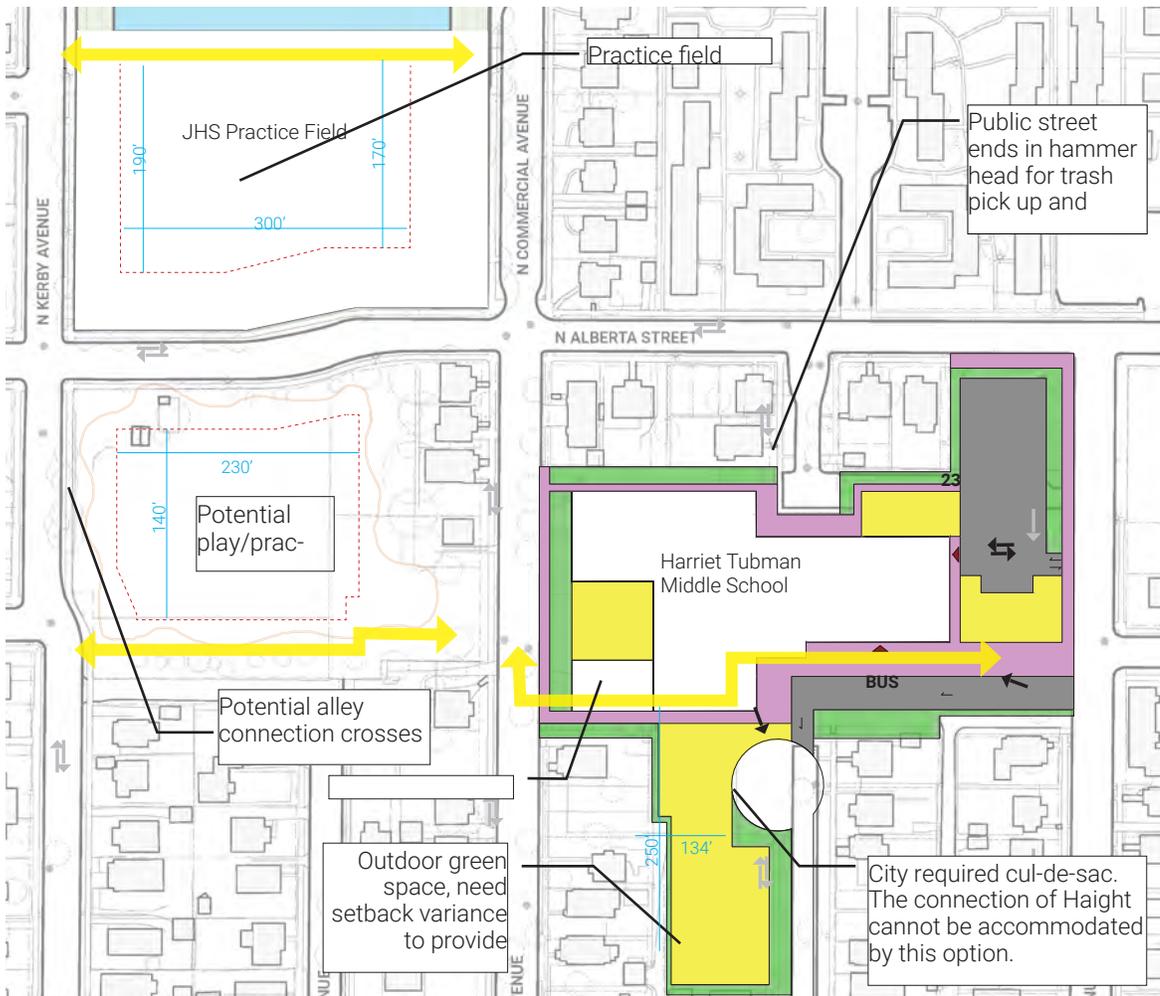
### SITE PROGRAM

NOTE: bold items included in option

- **Track & Field** (JHS)
- **Football** (JHS)
- Baseball / Softball (JHS)
- **Practice Field** (JHS)
- Tennis Courts (JHS)
- Softball Field (MS)
- **Soccer Field** (JHS on football field)
- Play / practice for baseball, soccer, and **running trail** (running trail around south lot perimeter)
- **Covered Outdoor Play Area** (MS)
- No known conflict with Site Utility easement
- Maintains separation of high school and middle school
- **Service Loading** (HTMS - at bus drop off)

- **Meets Setbacks** - building
- **On-Site Bus Loop** (MS - 5 buses)
- **On-Site Parent Drop-Off** (MS)
- **On-Site Parking** (MS 35 stalls)
- **Fire Access**
- Meets Setbacks - playfields do not
- **Site development aligns with neighborhood context**  
(alignment of drives to adj. streets)

### PROGRAM NOTES



# CONCEPT STUDIES

## SITE 3 HUMBOLDT

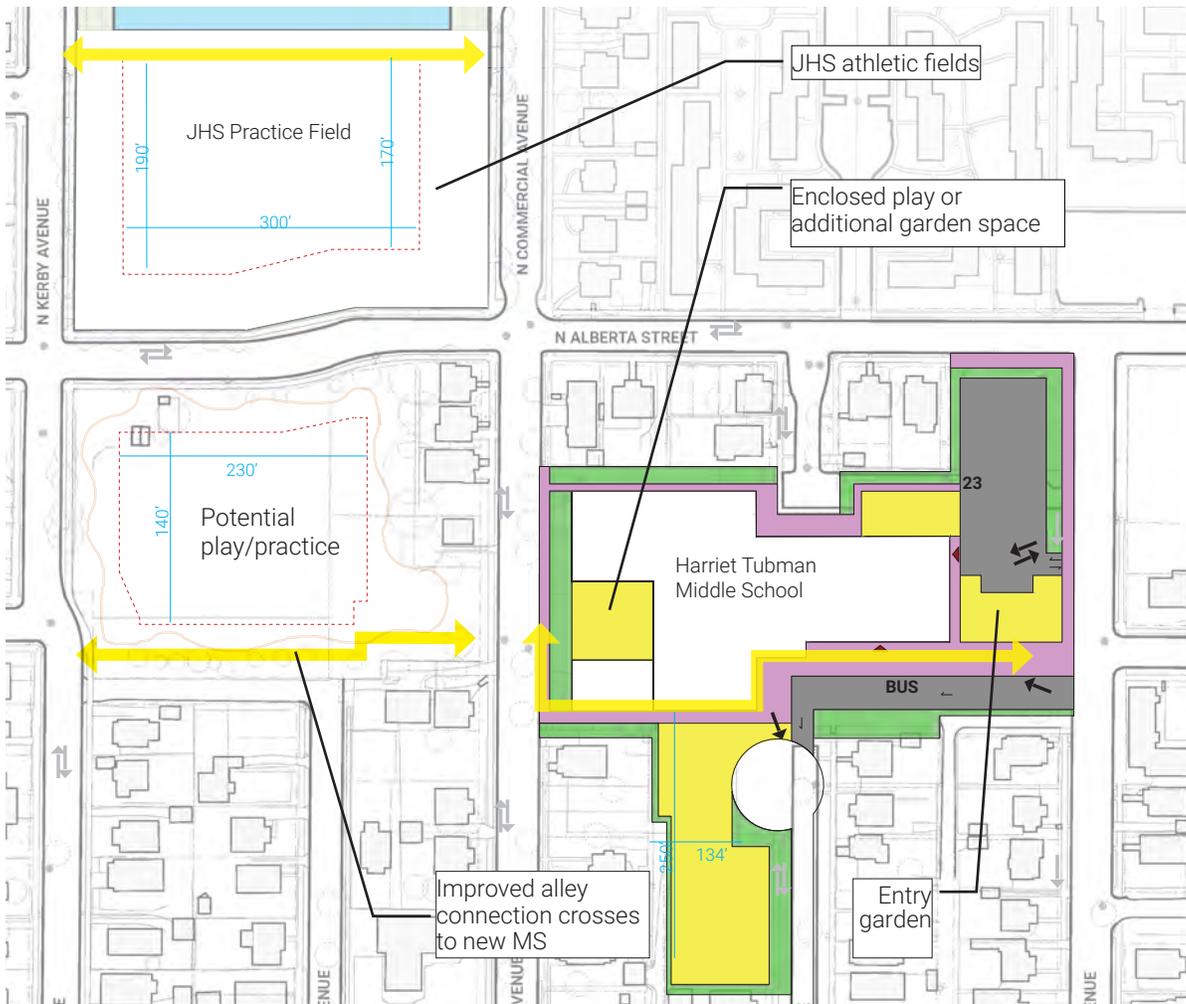
### OPPORTUNITIES

1. Connection for the neighborhood through two blocks is significant. From the alley improvement on Commercial through the enhanced pedestrian crossing and public route through the MS campus to Gantenbein, student walking routes and safety will be enhanced.
2. MS building can engage both east and west streets.
3. More exclusive outdoor playspace than other options.
4. Retention of mature trees in the south green field play area as well as in the South lot.
5. This HTMS location in this option would have no negatively impact JHS site planning underway.

### CHALLENGES

1. Impact to existing community garden for a parking lot.
2. The green play area at the south does not conform to setbacks for officially-sized playfields
3. No MS athletic fields
4. The one-way street at the east and the connection to Haight at the south will require negotiations with the City and more traffic study for bus circulation.

### STUDY NOTES

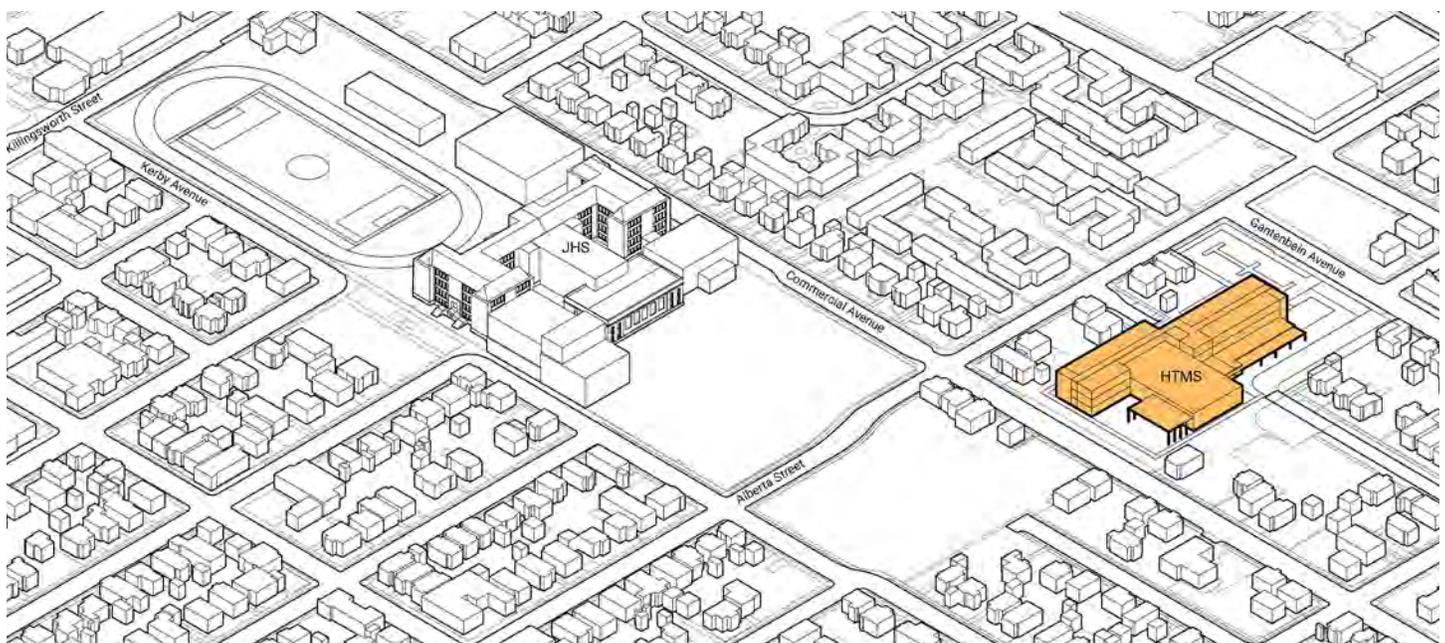
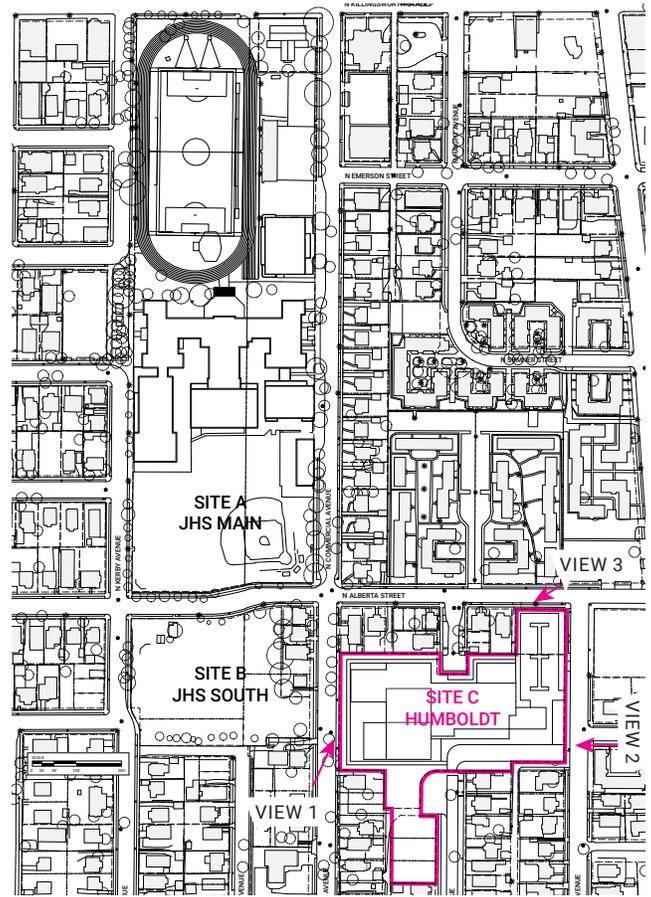


# CONCEPT STUDIES

## SITE 3 HUMBOLDT

Development of Site C has the least impact on JHS in terms of schedule and construction for the modernization project and in terms of long term operations. While sharing of outdoor space may still be a preferred strategy, this site has more on-site area than either of the others and it does not remove land from the JHS development area.

However, for HTMS, the need to relocate KairosPDX might delay the ability for PPS to develop the property for the new Middle School.



CONCEPT STUDIES  
SITE 3 HUMBOLDT  
STREET VIEWS



VIEW 1 - COMMERCIAL AVENUE LOOKING NORTHEAST



VIEW 2 - GANTENBEIN STREET & HUMBODLT AVENUE LOOKING WEST



VIEW 3 - ALBERTA STREET AND GANTENBEIN AVENUE LOOKING SOUTH-WEST

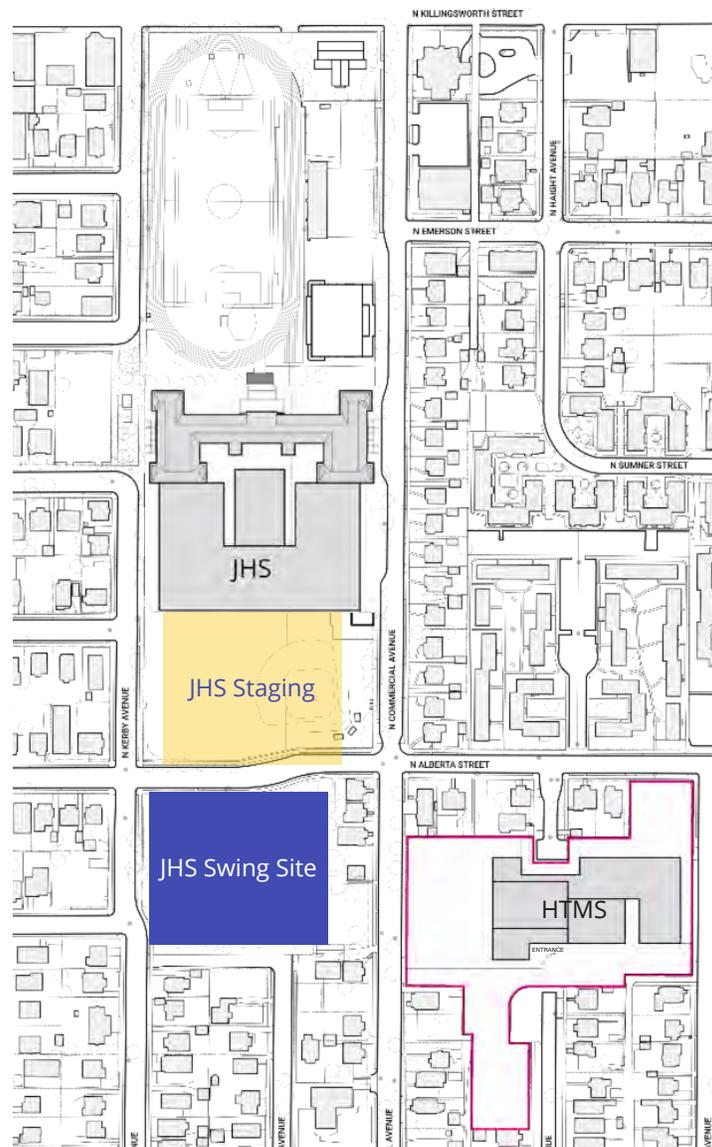
# CONCEPT STUDIES

## SITE 3 HUMBOLDT

### CONSTRUCTION PHASING AND STAGING

Staging for construction for HTMS could presumably occur on that site without impacting development of the JHS modernization.

JHS would continue to plan to either host students in the existing building or in an on-site temporary facility during the modernization of the high school. The south lot could serve either as the construction staging site for JHS or the location of the staging area. Neither function has a direct impact on the HTMS location.



# COST MODEL

## Scope of Work

### Project Scope Description

The project comprises of the cost planning for the Harriet Tubman Middle School located in Portland, OR. The scope of work consists of construction of a new 3-4 story structure with associated site and ROW work. Sitework is anticipated to involve new parking and a new bus loop, landscape improvements, and a covered play area. The project is divided into (4) design options:

Option 1A, 1B: New 4-story school building on the Jefferson High School campus.

Option 2: New 3-story school building located South of the Jefferson High School Campus on N Alberta St.

Option 3: New 3-story school building located on N Alberta St and N Commercial Ave on the existing Kairos school property.

### Project Design

The report is based on various Harriet Tubman Middle School design documents and other supplemental information dated June-July 2022, provided by the Bora design team.

### Procurement

It is anticipated that the project be delivered via GC/CM with a minimum of (3) qualified subcontractors to assure competitive market pricing.

## Overall Summary

	SF	\$/SF	TOTAL
Building Summary - Option 1A, 1B	94,450	667.03	63,000,918
Sitework - Option 1A	124,070	43.70	5,422,468
<b>OPTION 1A - RECOMMENDED BUDGET</b>	<b>218,520</b>	<b>313.12</b>	<b>68,423,386</b>
Building Summary - Option 1A, 1B	94,450	667.03	63,000,918
Sitework - Option 1B	115,143	45.84	5,278,296
<b>OPTION 1B - RECOMMENDED BUDGET</b>	<b>209,593</b>	<b>325.77</b>	<b>68,279,214</b>
Building - Option 2	94,450	667.03	59,420,905
Sitework - Option 2	115,143	45.85	5,279,170
<b>OPTION 2 - RECOMMENDED BUDGET</b>	<b>209,593</b>	<b>308.69</b>	<b>64,700,075</b>
Building - Option 3	94,450	654.40	61,808,112
Sitework - Option 3	174,061	46.68	8,125,361
<b>OPTION 3 - RECOMMENDED BUDGET</b>	<b>268,511</b>	<b>260.45</b>	<b>69,933,473</b>

This estimate is based on the following assumptions and clarifications:

- Acquisition costs are not included.

- Owner soft costs are not included.

- Prevailing wage labor rates are included.

- Sales tax is not included.

Cost assumes utilities are available, accessible, and functional for the proposed areas of work.

- The project will be performed during regular business hours.

Phasing and construction of occupied structures has an applied markup for the complexity of construction and impact to construction schedule.

# APPENDICES

Harriet Tubman Middle School [Re]Siting



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APPENDIX 4	21
APPENDIX 5	25

# APPENDIX 1

# EVALUATION CRITERIA MATRIX

## Detailed Criteria Matrix

This matrix evaluates each of the sites through various lenses, and a simple graphic summary is shown in the Executive Summary of the report. Points have been allocated as follows:

0 points: fails to comply with criteria

1 point: somewhat complies with criteria

2 points: best meets criteria

Some criteria relate to the High School component [JHS] while others relate to the Middle School component [MS], since both components must succeed as an outcome of this potential change in site use.

	A.1	A.2	B	C
	JHS North Lot / Keep HS per CMP	JHS North Lot / New HS North	JHS South Lot	Humboldt
<b>2 = Meets Criteria</b>				
<b>1 = Partially Meets Criteria</b>				
<b>0 = Does Not Meet Criteria</b>				
<b>Program (Interior)</b>				
Meets Ed Spec	2	2	2	2
JHS Theater as Community Resource	0	0	2	2
JHS Gym on Ground Floor	0	0	2	2
Good access to daylight from all occupied rooms	1	0	1	2
<b>Subtotal Program (Interior)</b>	<b>3</b>	<b>2</b>	<b>7</b>	<b>8</b>
<b>Program (Site)</b>				
Track & Field (JHS)	2	2	2	2
Football (JHS)	2	2	2	2
Baseball / Softball (JHS)	0	0	0	0
Practice Field (JHS)	2	2	0	2
Softball Field (HTMS)	0	0	0	0
Soccer Field (can overlay the Softball Field) (HTMS)	0	0	0	0
Play/practice for baseball, soccer and running trail (HTMS)	0	0	1	2
Covered Outdoor Play Area (HTMS)	2	2	2	2
No conflict with Site Utilities or easements	2	2	0	2
Maintains Separation of High School and Middle School	0	1	2	2
<b>Subtotal Program (Site)</b>	<b>10</b>	<b>11</b>	<b>9</b>	<b>14</b>
<b>Jurisdictional Requirements</b>				
Conforms to height limit	2	2	2	2
Meets Setbacks	2	2	2	2
Meets FAR	2	2	2	2
On Site Bus Loop (MS)	2	2	2	2
On Site Parent Drop Off (MS)	1	1	1	2
On Site Parking (MS)	1	1	1	2
Fire Access	1	1	2	2
Complexity of Land Use process	0	0	2	2
<b>Subtotal Jurisdictional Requirements</b>	<b>11</b>	<b>11</b>	<b>14</b>	<b>16</b>
<b>Schedule</b>				
Maintains Current JHS Schedule	0	0	1	2
Meets Proposed Tubman Schedule	1	1	1	2
Property Availability	2	2	2	0
<b>Subtotal Schedule</b>	<b>3</b>	<b>3</b>	<b>4</b>	<b>4</b>
<b>Community</b>				
Retains 1909 JHS Structure	2	0	2	2
Retains Alberta Street Community Garden	2	2	2	1
Scale of building appropriate to neighborhood context	1	1	1	2
Site development aligns with neighborhood context	1	1	1	1
<b>Subtotal Community</b>	<b>6</b>	<b>4</b>	<b>6</b>	<b>6</b>
<b>Total</b>	<b>33</b>	<b>31</b>	<b>40</b>	<b>48</b>

## APPENDIX 2

# ZONING & LAND USE ANALYSIS

## Harriet Tubman Middle School Relocation - Zoning Analysis

### Site A: JHS co-location

5210 N Kerby Avenue (bounded by N Killingsworth, N Kerby, N Alberta and N Commercial)

Zoning: IR – Institutional Residential

Overlay: m – Centers Main Street – on the south 120 feet (appx.) of the site

Conservation District: Piedmont Conservation District

**Uses:** School uses (except for High Schools) are a Conditional Use in the IR zone

Killingsworth is a transit street, and entire site is located in the Killingsworth/Interstate Pedestrian district

### Development Standards

Standard		Requirement	Notes
<b>IR Development Standards</b>			
<b>FAR</b>	Max FAR	2:1	
	Min Density/FAR	No requirement	Superseded by m overlay. See below.
	Bonus Density	N/A	
<b>Height</b>	Max Height	75'	Stepped-down height adjacent to residential zones is not required
<b>Setbacks</b>	Lot line abutting or across the street from OS, RF-R2.5	1 foot for every 2 feet of building height, but not less than 10 feet	Applies along the majority of the Kerby frontage
	Lot line abutting or across the street from RM1-RMP, IR zone		Applies along the Alberta frontage and majority of Commercial Street frontage and small portion of Kerby
	Lot line abutting or across the street from C, CI, E or zone		Applies only Killingsworth and a portion of Commercial Street frontage
	Max. Building Setback	10'	Applies to entire site along all frontages since the site is located in a pedestrian district. At least 50% of the setback area must be hard-surfaced for use by pedestrians. See m-overlay requirements.
<b>Maximum Building Coverage</b>		70% of site area	

# ZONING & LAND USE ANALYSIS

<b>Minimum Landscaped Area</b>	20% of site area	Landscaped to the L1. Up to 1/3 may be improved for passive or active pedestrian use or for use by pedestrians.
<b>Maximum Building Length</b>	none	
<b>Landscaping Across the street from an R-zoned lot</b>	10 feet to L3	Applies along the majority of the Kerby frontage
<b>Building Façade Articulation required</b>	no	
<b>Ground Floor Windows required</b>	yes	Superseded by m-overlay and additional IR requirements. See below.
<b>Transit Street Main Entrance</b>	no	
<b>Title 11 Trees</b>	Applies – 15% target for planting	
<b><i>M-Overlay Development Standards</i></b>		
<b>Required Ground Floor Active Use</b>	Within 100 feet of a transit street at least 25% of the ground floor must be in an active use. School use is considered an “active use”	Applies along Killingsworth
<b>Minimum FAR</b>	0.5 to 1	Site is located in the “Inner Pattern Area” – applies only in the m-overlay
<b>Maximum Building Setback</b>	At least 70% of the length of the ground level street facing façade must meet the max setback of 10 feet	Applies only in the m-overlay along Killingsworth
<b>Location of Vehicle Areas</b>	No more than 30% of transit street frontage may be used for vehicle area	Applies only in the m-overlay along Killingsworth
<b>Ground Floor Windows</b>	60% ground floor windows required	Applies only in the m-overlay along Killingsworth
<b>Entrances</b>	On transit streets at least one entrance is required for every 100 feet of building length for portions of the building subject to the maximum street setback.	Applies only in the m-overlay along Killingsworth
<b><i>The additional standards from the multi-dwelling zones apply in the IR zone unless superseded by an approved master plan:</i></b>		All are assumed to apply to this site
<b>Street-Facing Facades (33.120.232)</b>	- Windows must cover 40% of ground floor wall area for walls 5 feet or closer to the street lot line.	Only applies to portion of building with ground floor commercial uses. Would not apply to school uses.

# ZONING & LAND USE ANALYSIS

	- Windows must cover at least 25% of ground floor wall for walls over 5 feet from street lot line.	
<b>Pedestrian Standards (33.120.255)</b>	5 foot wide hard-surfaced pedestrian paths must connect the building to the street and connect all to all other areas of the site.	
<b>Additional Requirements</b>		
<b>Schools and Schools Sites (33.281)</b>	<ul style="list-style-type: none"> <li>- Provisions for on-site bus loading must be accommodated and approved by PBOT as part of the CU</li> <li>- Parking area landscaping may be downgraded to 20 feet to the L2 in place of L3</li> <li>- Site landscaping that required L3 landscaping may be replaced by L2 or L1.</li> </ul>	
<b>Recreational Fields and Organized Sports (33.279)</b>	<ul style="list-style-type: none"> <li>- Development or alterations to a recreational field for organized sports requires a conditional use review.</li> <li>- Fields must be setback 50 feet from adjacent R or IR zoned sites.</li> <li>- Spectator seating must be setback 30 feet from adjacent R or IR zoned sites.</li> <li>- Accessory uses such as concession stands and restrooms must be setback 15 feet.</li> </ul>	Special requirements apply to the sports fields on the JHS site.
<b>Superblock Regulations (33.293)</b>	<ul style="list-style-type: none"> <li>- Developments or major remodeling on superblock sites must provide walkways, landscape areas or public plazas up to 5% of the site.</li> <li>- Required walkways or plazas may be located anywhere on the site but must be accessible from the public sidewalk.</li> </ul>	Applies to sites with 50,000 sq. ft. or more of vacated streets.

# ZONING & LAND USE ANALYSIS

<b>Parking Standards</b>			
<b>Parking Minimum</b>		1/classroom for Jr. High 7/classroom for High School	Alternate parking ratio can be approved through the CU with support of a TIS
<b>Parking Maximum</b>		1.5/classroom for Jr. High 10.5/classroom for High School	
<b>Parking Location Restrictions</b>		- Adjacent to a transit street or in a ped district no more than 50% of the frontage may be used for vehicle areas. - Vehicle areas may only be located between the portion of the building that complies with the maximum street setback and two local service streets.	Applies on all frontages.  Ok to have vehicle area between building and street on Kerby or Commercial.
<b>Parking Landscape Buffers</b>		5' to the L2 required on all lot lines abutting a street.	
<b>Parking Interior Landscaping</b>		45 sf /parking space	
<b>Bike Parking</b>	Long Term	6 per classroom for grades K-8 5 per classroom for grades 9-12	All long-term parking must be covered and secure. For schools a minimum of 10% of the bike parking must be in a lockable room or enclosure or in a bike locker.
	Short Term	2, or 1 per 25,000 sq. ft. of net building area for all grades	Must be located within 50' of main building entrance.
<b>Loading Space</b>	Standard A space = 35' by 10' x 13' clearance	- One Standard A space req'd for buildings between 20,000 and 50,000 sq. ft. - Two Standard A spaces req'd for buildings over 50,000 sq. ft.	Loading vehicles must be able to enter and exit the site in a forward motion

## Piedmont Conservation District Requirements:

- Jefferson High School is considered a Significant Resource within the Conservation District.
- All exterior alterations to existing buildings, new structures and non-standard improvements in the right-of-way are subject to a historic resource review to ensure the historic value of the high school specifically, and the overall district in general is considered with the design.

# ZONING & LAND USE ANALYSIS

## Harriet Tubman Middle School Relocation - Zoning Analysis

### Site B: JHS South Lot

574 N Alberta (bounded by N Humboldt, N Kerby, N Alberta and N Commercial – not including NE corner)

Zoning: IR – Institutional Residential except for southeast corner (appx 70 ft) zoned R2.5 – Residential 2,500

Overlay: none

Uses: School uses are a Conditional Use in the IR zone and R2.5

Entire site is located in the Killingworth/Interstate Pedestrian district

### Development Standards

Standard	Requirement	Notes	
<b>IR Development Standards</b>			
<b>FAR</b>	Max FAR	2:1	
	Min Density/FAR	No requirement	
	Bonus Density	N/A	
<b>Height</b>	Max Height	75' Stepped-down height adjacent to residential zones is not required	
<b>Setbacks</b>	Lot line abutting or across the street from OS, RF-R2.5	1 foot for every 2 feet of building height, but not less than 10 feet Applies along the Kerby frontage and Humboldt frontage	
	Lot line abutting or across the street from RM1-RMP, IR zone		Applies along the Alberta frontage, Commercial frontage and abutting the property in the northeast corner.
	Lot line abutting or across the street from C, CI, E or zone		
	Max. Building Setback	10' Applies to entire site along all frontages since the site is located in a pedestrian district. At least 50% of the setback area must be hard-surfaced for use by pedestrians.	
<b>Maximum Building Coverage</b>		70% of site area	

# ZONING & LAND USE ANALYSIS

<b>Minimum Landscaped Area</b>	20% of site area	Landscaped to the L1. Up to 1/3 may be improved for passive or active pedestrian use or for use by pedestrians.
<b>Maximum Building Length</b>	none	
<b>Landscaping Across the street from an R-zoned lot</b>	10 feet to L3	Applies along the Kerby frontage and Humboldt frontage.
<b>Building Façade Articulation required</b>	no	
<b>Ground Floor Windows required</b>	yes	See additional IR requirements below.
<b>Transit Street Main Entrance</b>	no	
<b>Title 11 Trees</b>	Applies – 15% target for planting	
<b><i>The additional standards from the multi-dwelling zones apply in the IR zone unless superseded by an approved master plan:</i></b>		All are assumed to apply to this site
<b>Street-Facing Facades (33.120.232)</b>	Windows must cover 40% of ground floor wall area for walls 5 feet or closer to the street lot line. Windows must cover at least 25% of ground floor wall for walls over 5 feet from street lot line.	Only applies to portion of building with ground floor commercial uses. Would not apply to school uses.
<b>Pedestrian Standards (33.120.255)</b>	5 foot wide hard-surfaced pedestrian paths must connect the building to the street and connect all to all other areas of the site.	
<b><i>R2.5 Development Standards</i></b>		The school use would be subject to the Institutional Development Standards of 33.100.270
<b>Maximum FAR</b>	0.5 to 1	
<b>Maximum Height</b>	50 feet	
<b>Minimum Setbacks</b>	1 ft for every 2 feet of building height, but in no case less than 15 feet.	
<b>Maximum Setbacks</b>	20 feet	Buildings must meet the provisions of 33.120.220.C. At least 50% of the ground level street facing façade must meet the maximum setback standard. On sites with

# ZONING & LAND USE ANALYSIS

		three or more frontages, standard only needs to be met on two streets.
<b>Maximum Building Coverage</b>	50%	
<b>Minimum Landscape Area</b>	25%	
<b>Buffering from Residential Zone</b>	15 feet to the L3 standard	Applies along south property line. Could be reduced to L2 or L1 for school site.
<b>Buffering across the street from Residential Zone</b>	15 feet to the L1 standard	Applies along Commercial Street.
<b>Setback for Outdoor Activity Facilities</b>	50 feet from R-zone. Playground facilities must be setback 25 feet from R-zoned properties if not illuminated or 50 feet if illuminated.	Includes basketball courts, tennis courts and baseball diamonds.
<b>Additional Requirements</b>		
<b>Schools and Schools Sites (33.281)</b>	<ul style="list-style-type: none"> <li>- Provisions for on-site bus loading must be accommodated and approved by PBOT as part of the CU</li> <li>- Parking area landscaping may be downgraded to 20 feet to the L2 in place of L3</li> <li>- Site landscaping that required L3 landscaping may be replaced by L2 or L1.</li> </ul>	
<b>Parking Standards</b>		
<b>Parking Minimum</b>	1/classroom for Jr. High	Alternate parking ratio can be approved through the CU with support of a TIS
<b>Parking Maximum</b>	1.5/classroom for Jr. High	
<b>Parking Location Restrictions</b>	<ul style="list-style-type: none"> <li>- Adjacent to a transit street or in a ped district no more than 50% of the frontage may be used for vehicle areas.</li> <li>- Vehicle areas may only be located between the portion of the building that complies with the maximum street setback and two local service streets.</li> </ul>	Applies on all frontages.  Ok to have vehicle area between building and street on Kerby or Commercial.
<b>Parking Landscape Buffers</b>	5' to the L2 required on all lot lines abutting a street.	

# ZONING & LAND USE ANALYSIS

<b>Parking interior landscaping</b>		45 sf /parking space	
<b>Bike Parking</b>	Long Term	6 per classroom for grades K-8	All long-term parking must be covered and secure. For schools a minimum of 10% of the bike parking must be in a lockable room or enclosure or in a bike locker.
	Short Term	2, or 1 per 25,000 sq. ft. of net building area for all grades	Must be located within 50' of main building entrance.
<b>Loading Space</b>	Standard A space = 35' by 10' x 13' clearance	<ul style="list-style-type: none"> <li>- One Standard A space req'd for buildings between 20,000 and 50,000 sq. ft.</li> <li>- Two Standard A spaces req'd for buildings over 50,000 sq. ft.</li> </ul>	Loading vehicles must be able to enter and exit the site in a forward motion

# ZONING & LAND USE ANALYSIS

## Harriet Tubman Middle School Relocation - Zoning Analysis

### Site C: Humboldt Site

4915 N Gantenbein Ave (Bounded by N Commercial and N Gantenbein on E/W. N Haight Ave dead ends into site on N/S)

Zoning: North half RM2 – Residential Multi-Dwelling 2

South half R2.5 – Residential 2,500

**Uses:** School uses are a Conditional Use in the RM2 and R2.5 zones.

**Note:** Portions of the identified site are located within the public right-of-way of N Haight Avenue and two un-named public alleys. Developing these lands will first require these streets to be vacated by the City of Portland.

### Development Standards

Standard	Requirement	Notes
<b>RM2 Development Standards</b>		The school use would be subject to the Institutional Development Standards of 33.120.275
<b>Maximum FAR</b>	2 to 1	
<b>Maximum Height</b>	75 feet	
<b>Minimum Setbacks</b>	1 ft for every 2 feet of building height, but in no case less than 10 feet.	
<b>Maximum Setbacks</b>	20 feet	Not applicable since site is not on a transit street or in a pedestrian district
<b>Maximum Building Coverage</b>	70%	
<b>Minimum Landscape Area</b>	20%	
<b>Buffering from Residential Zone</b>	10 feet to the L3 standard	Applies along all non-street lot lines. Could be reduced to L2 or L1 for school site.
<b>Buffering across the street from Residential Zone</b>	10 feet to the L1 standard	Applies along almost all street lot lines of site.
<b>Setback for Outdoor Activity Facilities</b>	50 feet from R-zone. Playground facilities must be setback 25 feet from R-zoned properties if not illuminated or 50 feet if illuminated.	Includes basketball courts, tennis courts and baseball diamonds.

## ZONING & LAND USE ANALYSIS

<b>Maximum Building Length</b>	Maximum building length for portions of the building within 30 feet of the street lot line is 100 feet.	Portions of the building subject to this standard must be broken with gaps that are at least 10 feet wide.
<b>Façade Articulation</b>	Articulation is required for buildings more than 35 feet tall that have a façade more than 3,500 sq. ft. within 20 feet of a street lot line.	At least 25% of the façade must be divided into separate planes.
<b>Ground Floor Windows</b>	<ul style="list-style-type: none"> <li>- Windows must cover 40% of ground floor wall area for walls 5 feet or closer to the street lot line.</li> <li>- Windows must cover at least 25% of ground floor wall for walls over 5 feet from street lot line.</li> </ul>	Only applies to portion of building with ground floor commercial uses. Would not apply to school uses.
<b>Pedestrian Standards</b>	5 foot wide hard-surfaced pedestrian paths must connect the building to the street and connect all to all other areas of the site.	
<b>R2.5 Development Standards</b>		The school use would be subject to the Institutional Development Standards of 33.100.270
<b>Maximum FAR</b>	0.5 to 1	
<b>Maximum Height</b>	50 feet	
<b>Minimum Setbacks</b>	1 ft for every 2 feet of building height, but in no case less than 15 feet.	
<b>Maximum Setbacks</b>	20 feet	Buildings must meet the provisions of 33.120.220.C. At least 50% of the ground level street facing façade must meet the maximum setback standard. On sites with three or more frontages, standard only needs to be met on two streets.
<b>Maximum Building Coverage</b>	50%	
<b>Minimum Landscape Area</b>	25%	
<b>Buffering from Residential Zone</b>	15 feet to the L3 standard	Applies along all non-street lot lines. Could be reduced to L2 or L1 for school site.

## ZONING & LAND USE ANALYSIS

<b>Buffering across the street from Residential Zone</b>	15 feet to the L1 standard	Applies along almost all street lot lines of site.
<b>Setback for Outdoor Activity Facilities</b>	50 feet from R-zone. Playground facilities must be setback 25 feet from R-zoned properties if not illuminated or 50 feet if illuminated.	Includes basketball courts, tennis courts and baseball diamonds.
<b>Pedestrian Standards (of 33.120.255)</b>	5 foot wide hard-surfaced pedestrian paths must connect the building to the street and connect all to all other areas of the site.	
<b>Additional Requirements</b>		
<b>Schools and Schools Sites (33.281)</b>	<ul style="list-style-type: none"> <li>- Provisions for on-site bus loading must be accommodated and approved by PBOT as part of the CU</li> <li>- Parking area landscaping may be downgraded to 20 feet to the L2 in place of L3</li> <li>- Site landscaping that required L3 landscaping may be replaced by L2 or L1.</li> </ul>	
<b>Superblock Regulations (33.293)</b>	<ul style="list-style-type: none"> <li>- Developments or major remodeling on superblock sites must provide walkways, landscape areas or public plazas up to 5% of the site.</li> <li>- Required walkways or plazas may be located anywhere on the site but must be accessible from the public sidewalk.</li> </ul>	Applies to sites with 50,000 sq. ft. or more of vacated streets.
<b>Parking Standards</b>		
<b>Parking Minimum</b>	1/classroom for Jr. High	Alternate parking ratio can be approved through the CU with support of a TIS
<b>Parking Maximum</b>	1.5/classroom for Jr. High	

# ZONING & LAND USE ANALYSIS

<b>Parking Location Restrictions</b>		- Adjacent to a transit street or in a ped district no more than 50% of the frontage may be used for vehicle areas. - Vehicle areas may only be located between the portion of the building that complies with the maximum street setback and two local service streets.	Applies on all frontages.  Ok to have vehicle area between building and street on Kerby or Commercial.
<b>Parking Landscape Buffers</b>		5' to the L2 required on all lot lines abutting a street.	
<b>Parking Interior Landscaping</b>		45 sf /parking space	
<b>Bike Parking</b>	Long Term	6 per classroom for grades K-8	All long-term parking must be covered and secure. For schools a minimum of 10% of the bike parking must be in a lockable room or enclosure or in a bike locker.
	Short Term	2, or 1 per 25,000 sq. ft. of net building area for all grades	Must be located within 50' of main building entrance.
<b>Loading Space</b>	Standard A space = 35' by 10' x 13' clearance	- One Standard A space req'd for buildings between 20,000 and 50,000 sq. ft. - Two Standard A spaces req'd for buildings over 50,000 sq. ft.	Loading vehicles must be able to enter and exit the site in a forward motion

## APPENDIX 3

EASEMENT DOCUMENTS

EASEMENT 2106 PAGE 009

KNOW ALL MEN BY THESE PRESENTS: That School District No. 1, Multnomah County, Oregon, a quasi municipal corporation of the State of Oregon, hereinafter called Grantor, for and in consideration of the sum of One Dollar and other valuable consideration, to it paid by Northwest Natural Gas Company, a corporation of the State of Oregon, hereinafter called Grantee, the receipt of which is hereby acknowledged, has granted, bargained, sold and conveyed, and by these presents does grant, bargain, sell and convey unto the said Grantee, its successors and assigns, the right of way and easement to install, maintain and operate a gas pressure regulator and appurtenances, boiler and appurtenances, fencing of a portion of said easement described as: Beginning at the southwest corner of Lot "O" of M. Patton's Tract in the City of Portland, Multnomah County, Oregon; thence N. along the west line of said Lot "O" 200 feet; thence E. 102.8 feet to the true point of beginning; thence S. 40 feet; thence W. 20.2 feet; thence N. 40 feet; thence E. 20.2 feet to the true point of beginning, and gas pipelines and appurtenances in, along, upon and across a tract of land in the City of Portland, Multnomah County, Oregon, said tract of land being more particularly described as follows, to wit:

Beginning at the southwest corner of Lot "O" of M. Patton's Tract in the City of Portland, Multnomah County, Oregon; thence N. along the west line of said Lot "O" 200 feet; thence E. 102.8 feet; thence S. 40 feet; thence W. 77.8 feet; thence S. 150 feet to the south line of said Lot "O"; thence W. 25 feet to the point of beginning, all as shown on drawing 49-2126, attached hereto and by this reference made a part hereof.

Together with the right to enter upon said premises, to lay, repair, replace or remove said facilities and appurtenances.

In consideration of the premises, Grantor agrees that no buildings or other structures will be constructed within said easement tract, and that no operations will be carried on upon said premises that will jeopardize the safe operation of Grantee's facilities therein.

IN WITNESS WHEREOF Grantor has caused this instrument to be duly signed this 13th day of March, 1962.

SCHOOL DISTRICT NO. 1

By Mary W. Rieker  
Chairman of the Board of Directors

George M. Baldwin  
School Clerk

STATE OF OREGON )  
County of Multnomah ) ss.

On this 13th day of March, 1962, personally appeared Mary W. Rieker, who, being duly sworn, did say that she is the Chairman of the Board of Directors of School District No. 1, Multnomah County, Oregon, and that said instrument was signed and sealed in behalf of said School District No. 1 by authority of its board of directors; and she acknowledged said instrument to be its voluntary act and deed. Before me:

John J. Heath  
Notary Public for Oregon

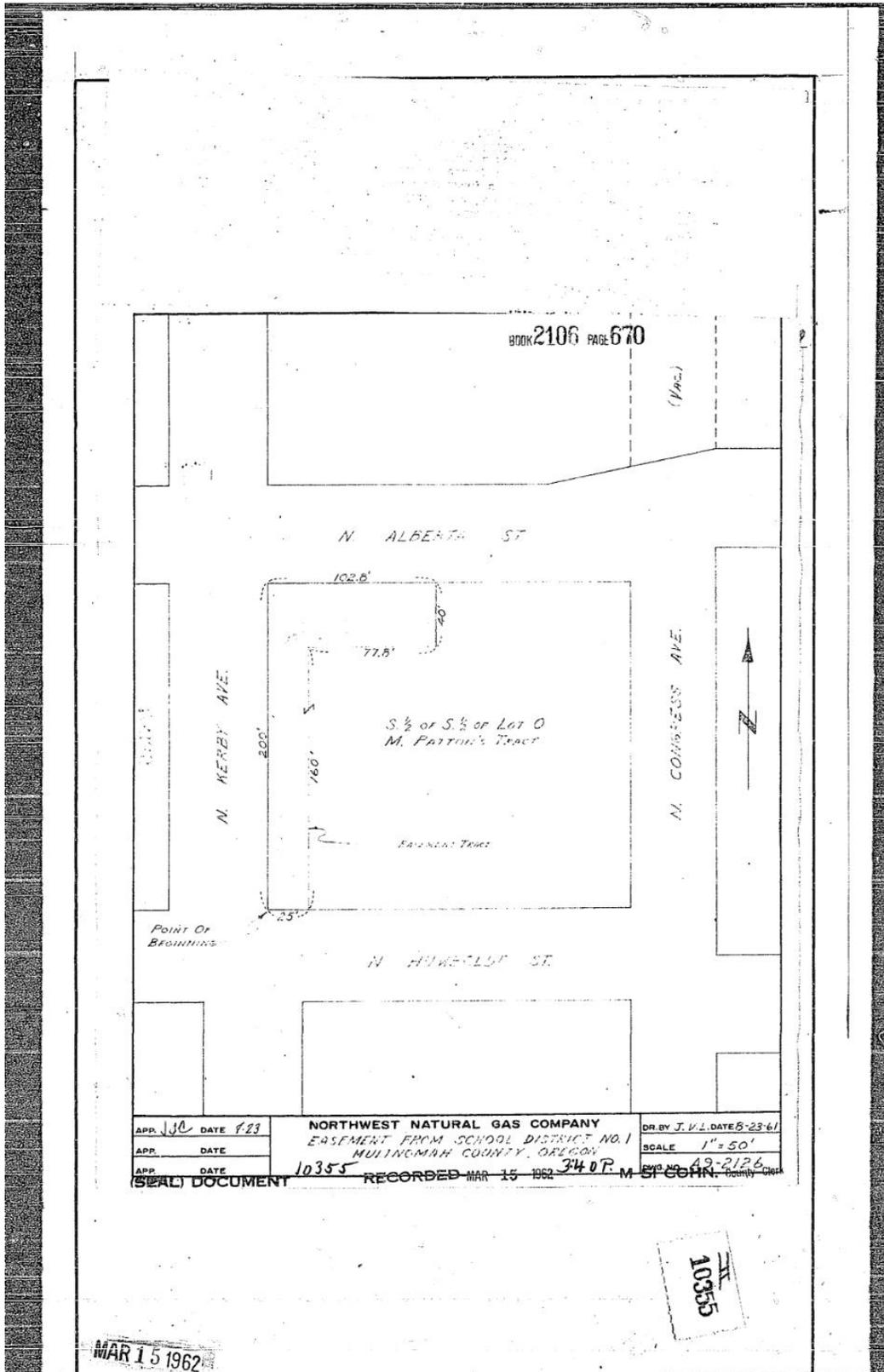
My Commission expires: Aug. 14, 1965

TITLE AND TRUST COMPANY

MAR 15 1962

10355

EASEMENT DOCUMENTS



# APPENDIX 4



*First American Title Insurance Company*

*National Commercial Services*

*200 SW Market Street Suite 250*

*Portland, OR 97201*

*(503)795-7600 - Fax (866)678-0591*

Title Officer: Steve Manome  
(503)219-8742  
smanome@firstam.com  
(866)678-0591

LOT BOOK SERVICE

Portland Public Schools  
501 N Dixon  
Portland, OR 97227

Order No.: NCS-1138824-OR1

Attn: Kirsten Cowden  
Phone No.: (503)916-3913 - Fax No.:  
Email: kcowden1@pps.net

Re: 4915 North Gantenbein Avenue

We have searched our Tract Indices as to the following described property:

The land referred to in this report is described in Exhibit A attached hereto.

and as of July 08, 2022 at 8:00 a.m.

We find that the last deed of record runs to

School District No. 1J, Multnomah County, Oregon and Portland Public Schools, a municipal corporation of the State of Oregon and School District No. 1, Multnomah County

We also find the following apparent encumbrances prior to the effective date hereof:

1. Conditions and restrictions contained in Ordinance No. 109538, a copy of which was recorded March 16, 1959 as [Book 1945, page 416](#).
2. Conditions and restrictions contained in Conditional Use Permit No. CU 46-66 recorded August 3, 1966 in [Book 519, page 1086](#)
3. Conditions and restrictions contained in Conditional Use Permit No. \_\_\_\_\_ recorded August 24, 1966 in Book 524, page 216

4. Reservation of utilities in vacated alley and the right to maintain the same as set forth in Ordinance No. 123420 a copy of which was recorded January 19, 1967 as [Book 544, page 87](#)
5. Conditions and restrictions contained in Conditional Use Permit Nos. CU 105-77, 106-77, 107-77, 108-77 and 110-77 recorded December 20, 1977 in [Book 1229, page 1631](#)
6. Conditions and restrictions contained in Conditional Use Permit No. CU 52-80 recorded July 25, 1980 in [Book 1457, page 1278](#)
7. Conditions and restrictions contained in Conditional Use Permit No. CU 62-87 recorded August 31, 1987 in [Book 2038, page 1613](#)
8. Conditions and restrictions contained in Conditional Use Permit No. CU 115-89 recorded April 5, 1990 in [Book 2290, page 390](#)
9. Unrecorded leases or periodic tenancies, if any.

We have also searched our General Index for Judgments and State and Federal Liens against the Grantee(s) named above and find:

NONE

We also find the following unpaid taxes and city liens:

1. General and special taxes and assessments for the fiscal year 2022-2023, a lien not yet due or payable.
2. General and special taxes and assessments for the fiscal year 2021-2022 are exempt. If the exempt status is terminated an additional tax may be levied. A.P. No.: R131387, R131385, R131412, R131413, R131414 and R131386.
3. City liens, if any, for the city of Portland.

Note: An inquiry has NOT been made concerning the actual status of such liens. A fee of \$25.00 will be charged per tax account each time an inquiry request is made.

THIS IS NOT a title report since no examination has been made of the title to the above described property. Our search for apparent encumbrances was limited to our Tract Indices, and therefore above listings do not include additional matters which might have been disclosed by an examination of the record title. We assume no liability in connection with this Lot Book Service and will not be responsible for errors or omissions therein. The charge for this service will not include supplemental reports, rechecks or other services.

## Exhibit "A"

Real property in the County of Multnomah , State of Oregon, described as follows:

## PARCEL I:

Lots [1, 2, 3, 4](#), 5, 6, 7 and 8, Block 2, Lots 3, 4, 5, 6, 7 and 8, Block 3, Lots 1, 2 and 3, Block 7 and Lots 1 and 18, Block 8, CENTRAL ALBINA ADDITION, in the City of Portland, County of Multnomah and State of Oregon.

TOGETHER WITH that portion of the vacated alleys and vacated N. Humbolt Street which inured thereto pursuant to Ordinance No. 109439 recorded April 8, 1959 in [Book 1949, page 331](#).

ALSO TOGETHER WITH all of the vacated alley adjacent on the west of Lots 1 and 2, Block 2, as vacated by Ordinance No. 118856, dated July 15, 1964.

ALSO TOGETHER WITH that portion of the vacated alley in Block 7 which inured to Lots 2 and 3 pursuant to Ordinance No. 123420, recorded January 19, 1967 in [Book 544, page 87](#).

EXCEPTING THEREFROM that portion of Lots 2 and 3, Block 7 dedicated to the City of Portland by instrument recorded November 30, 1959 in [Book 1985, page 665](#).

ALSO EXCEPTING THEREFROM that portion of the vacated alley conveyed to the City of Portland by Deed for Street Purposes recorded August 23, 1976 in [Book 1122, page 1847](#) and rerecorded March 15, 1977 in [Book 1164, page 299](#).

## PARCEL II:

Lot 4, Block 7, CENTRAL ALBINA ADDITION, in the City of Portland, County of Multnomah and State of Oregon.

EXCEPTING THEREFROM that portion conveyed to the City of Portland by Deed for Street Purposes recorded January 19, 1967 in [Book 544, page 93](#).

## PARCEL III:

Lot 5, Block 7, CENTRAL ALBINA ADDITION, in the City of Portland, County of Multnomah and State of Oregon.

## PARCEL IV:

Lot 6, Block 7, CENTRAL ALBINA ADDITION, in the City of Portland, County of Multnomah and State of Oregon.

# APPENDIX 5



*First American Title Insurance Company*

*National Commercial Services*

*200 SW Market Street Suite 250*

*Portland, OR 97201*

*(503)795-7600 - Fax (866)678-0591*

Title Officer: Tina Carleton

(503)795-7606

tcarleton@firstam.com

(866)678-0591

LOT BOOK SERVICE

Portland Public Schools  
501 N Dixon  
Portland, OR 97227

Order No.: NCS-985971-OR1

Attn: Kirsten Cowden  
Phone No.: (503)916-3913 - Fax No.:  
Email: kcowden1@pps.net

Re: Jefferson High School

We have searched our Tract Indices as to the following described property:

The land referred to in this report is described in Exhibit A attached hereto.

and as of June 23, 2022 at 8:00 a.m.

We find that the last deed of record runs to

School District No. 1, Multnomah County, Oregon, a quasi-municipal corporation of the State of Oregon

We also find the following apparent encumbrances prior to the effective date hereof:

1. Conditions, restrictions and easements contained in Ordinance No. 51196, a copy of which was recorded January 6, 1927 in Book 1068, page 325.

(Affects vacated North Congress Avenue)

2. Conditions, restrictions and easements contained in Ordinance No. 51195, a copy of which was recorded January 6, 1927 in Book 1068, page 327.

(Affects vacated Brainard Street)

3. Conditions, restrictions and easements contained in Ordinance No. 55221, a copy of which was recorded September 15, 1928 in Book 1151, page 320.  
  
(Affects vacated North Congress Avenue)
4. Conditions and restrictions contained in Ordinance No. 96660, a copy of which was recorded July 19, 1952 in Book 1546, page 458.
5. Conditions, restrictions and easements contained in Ordinance No. 116129, a copy of which was recorded December 17, 1962 in Book 2147, page 369.  
  
(Affects vacated North Congress Avenue and vacated North Humboldt Street)
6. Conditions and restrictions contained in Conditional Use Permit No. CU 47-63 recorded September 1963 in Book 2188, page 487
7. Conditions, restrictions and easements contained in Ordinance No. 117169, a copy of which was recorded November 13, 1963 in Book 2195, page 3.  
  
(Affects vacated North Congress Avenue)
8. Conditions and restrictions contained in Conditional Use Permit No. CU 13-64 recorded March 26, 1964 in Book 7, page 171
9. Conditions and restrictions contained in Conditional Use Permit No. CU 61-66 recorded August 23, 1966 in Book 522, page 1307
10. Conditions and restrictions contained in Conditional Use Permit No. CU 34-68 recorded July 12, 1968 in Book 629, page 824
11. Easement, including terms and provisions contained therein:  
Recording Information: January 20, 1976 in Book 1083, page 1277  
In Favor of: Pacific Power & Light Company, a corporation  
For: Electric transmission and distribution line
12. The terms and provisions contained in the document entitled "Revocable Permit to Use Dedicated Street Areas" recorded October 31, 2013 as Recording No. 2013-144356 of Official Records.  
  
(Affects North Kerby Avenue)
13. Conditions and restrictions contained in Land Use Review File No. LU 16-211724 HRM recorded October 10, 2016 as Recording No. 2016-127275
14. Unrecorded leases or periodic tenancies, if any.
15. Easement, including terms and provisions contained therein:  
Recording Information: March 15, 1962 in Book 2106, page 669  
In Favor of: Northwest Natural Gas Company  
For: Gas pressure regulator and appurtenances, boiler and appurtenances and fencing

We have also searched our General Index for Judgments and State and Federal Liens against the Grantee(s) named above and find:

NONE

We also find the following unpaid taxes and city liens:

1. General and special taxes and assessments for the fiscal year 2021-2022 are exempt. If the exempt status is terminated an additional tax may be levied. A.P. No.: R210923, R298127, R210799, R210924, R135700, R131398 and R131400.
2. City liens, if any, for the city of Portland.

Note: An inquiry has NOT been made concerning the actual status of such liens. A fee of \$25.00 will be charged per tax account each time an inquiry request is made.

THIS IS NOT a title report since no examination has been made of the title to the above described property. Our search for apparent encumbrances was limited to our Tract Indices, and therefore above listings do not include additional matters which might have been disclosed by an examination of the record title. We assume no liability in connection with this Lot Book Service and will not be responsible for errors or omissions therein. The charge for this service will not include supplemental reports, rechecks or other services.

## Exhibit "A"

Real property in the County of Multnomah , State of Oregon, described as follows:

LOT "O" IN M. PATTON'S TRACT (PLAT VOLUME 151, PAGE 11), IN THE CITY OF PORTLAND, COUNTY OF MULTNOMAH AND STATE OF OREGON.

EXCEPTING THEREFROM THAT PORTION CONVEYED TO THE CITY OF PORTLAND BY DEED RECORDED NOVEMBER 23, 1928 IN BOOK 1164, PAGE 137.

TOGETHER WITH LOTS 1 THROUGH 10, INCLUSIVE, BLOCK 1, L. C. PATTON'S SUBDIVISION OF BLOCK "J" IN M. PATTON (PLAT VOLUME 360, PAGE 38), IN THE CITY OF PORTLAND, COUNTY OF MULTNOMAH AND STATE OF OREGON.

TOGETHER WITH LOTS 1 THROUGH 8, INCLUSIVE, BLOCK 6, L. C. PATTON'S SUBDIVISION OF BLOCK "J" IN M. PATTON (PLAT VOLUME 360, PAGE 38), IN THE CITY OF PORTLAND, COUNTY OF MULTNOMAH AND STATE OF OREGON.

TOGETHER WITH LOTS 1 THROUGH 9, INCLUSIVE, BLOCK "A", WALNUT PARK (PLAT VOLUME 308, PAGE 62), IN THE CITY OF PORTLAND, COUNTY OF MULTNOMAH AND STATE OF OREGON.

TOGETHER WITH LOTS 1 THROUGH 8, INCLUSIVE, BLOCK "B", WALNUT PARK (PLAT VOLUME 308, PAGE 62), IN THE CITY OF PORTLAND, COUNTY OF MULTNOMAH AND STATE OF OREGON.

TOGETHER WITH LOTS 4 THROUGH 7, INCLUSIVE, BLOCK "C", WALNUT PARK (PLAT VOLUME 308, PAGE 62), IN THE CITY OF PORTLAND, COUNTY OF MULTNOMAH AND STATE OF OREGON.

TOGETHER WITH LOTS 4 AND 5, BLOCK 20, AMENDED PLAT OF CLIFFORD (PLAT VOLUME 163, PAGE 36), IN THE CITY OF PORTLAND, COUNTY OF MULTNOMAH AND STATE OF OREGON.

EXCEPTING THEREFROM THE SOUTH 25 FEET CONVEYED TO THE CITY OF PORTLAND BY DEED FOR STREET PURPOSES RECORDED NOVEMBER 18, 1964 IN BOOK 172, PAGE 270.

TOGETHER WITH THE WEST HALF OF LOT 2, ALL OF LOT 3, THE WEST HALF OF LOT 4, ALL OF LOT 7, THE WEST HALF OF LOT 6, THE SOUTH HALF OF THE EAST HALF OF LOT 6 AND THE SOUTH HALF OF LOT 5, ALL IN BLOCK 4, CENTRAL ALBINA ADDITION (PLAT VOLUME 140, PAGE 23), IN THE CITY OF PORTLAND, COUNTY OF MULTNOMAH AND STATE OF OREGON.

EXCEPTING FROM SAID LOTS 2 AND 3 THAT PORTION CONVEYED TO THE CITY OF PORTLAND BY DEED FOR STREET PURPOSES RECORDED NOVEMBER 13, 1963 IN BOOK 2195, PAGE 1.

TOGETHER WITH LOTS 8, 9, 10 AND 11, BLOCK 2, SUBDIVISION OF TRACT "K", M. PATTON'S TRACT (PLAT VOLUME 308, PAGE 21), IN THE CITY OF PORTLAND, COUNTY OF MULTNOMAH AND STATE OF OREGON.

TOGETHER WITH THOSE PORTIONS OF VACATED CONGRESS STREET, WHICH INURED THERETO BY ORDINANCE NO. 18152, RECORDED AUGUST 12, 1908; NO. 21517, RECORDED JULY 16, 1910; NO. 51196, RECORDED JANUARY 6, 1927 IN BOOK 1068, PAGE 325 AND NO. 55221, RECORDED SEPTEMBER 15, 1928 IN BOOK 1151, PAGE 320, NO. 116129, RECORDED DECEMBER 17, 1962 IN BOOK 2147, PAGE 369, NO. 117169, RECORDED NOVEMBER 13, 1963 IN BOOK 2195, PAGE 3 AND NO. 119270, RECORDED NOVEMBER 18, 1964 IN BOOK 172, PAGE 266.

TOGETHER WITH THAT PORTION OF VACATED SUMNER STREET, WHICH INURED THERETO BY

ORDINANCE NO. 18153, RECORDED AUGUST 12, 1908.

TOGETHER WITH THAT PORTION OF VACATED EMERSON STREET, WHICH INURED THERETO BY ORDINANCE NO. 21517, RECORDED JULY 16, 1910.

TOGETHER WITH THAT PORTION OF VACATED BRAINARD STREET, WHICH INURED THERETO BY ORDINANCE NO. 51195, RECORDED JANUARY 6, 1927 IN BOOK 1068, PAGE 327.

TOGETHER WITH THOSE PORTIONS OF VACATED NORTH HUMBOLDT STREET, WHICH INURED THERETO BY ORDINANCE NO. 116129, RECORDED DECEMBER 17, 1962 IN BOOK 2147, PAGE 369 AND NO. 119270, RECORDED NOVEMBER 18, 1964 IN BOOK 172, PAGE 266.



# Harriet Tubman Middle School Relocation: Overview

September 22, 2022





# Agenda

- Overview
  - Engaging Community on Relocation Decision
  - Schedule Update
  - Review of June Committee Discussion
  
- Due Diligence Vol. 4 - Relocation Options
  - continued site analysis
  - academic adequacy
  
- Committee Feedback



## Efforts to Date



COMMUNITY ENGAGEMENT

Dec	Initial property search (location, acreage, timing)
Jan	Expanded options (PPS sites, outside catchment)
Feb	Due Diligence Vol. 1
Mar	Due Diligence Vol. 2
April	Cont. Site analyses
May	Cont. Site analyses
June	<b>Due Diligence Vol. 3</b>
July	Cont. Site analyses
Aug	Cont. Site analyses
Sept	<b>Due Diligence Vol. 4</b>



# Community Engagement Update

We've reached a juncture on the project that requires us to reset the community engagement strategy including **recognizing the work from our community to date, update all stakeholders on the work done to date, resetting the selection criteria with the community, and aligning selection with the Center for Black Student Excellence design process** to ensure that major capital projects in the Albina neighborhood are working in tandem to advance Black student achievement.

We are finalizing a robust and detailed community, student, and stakeholder design and engagement plan, developed in coordination with our community partners like The Center for Black Excellence.

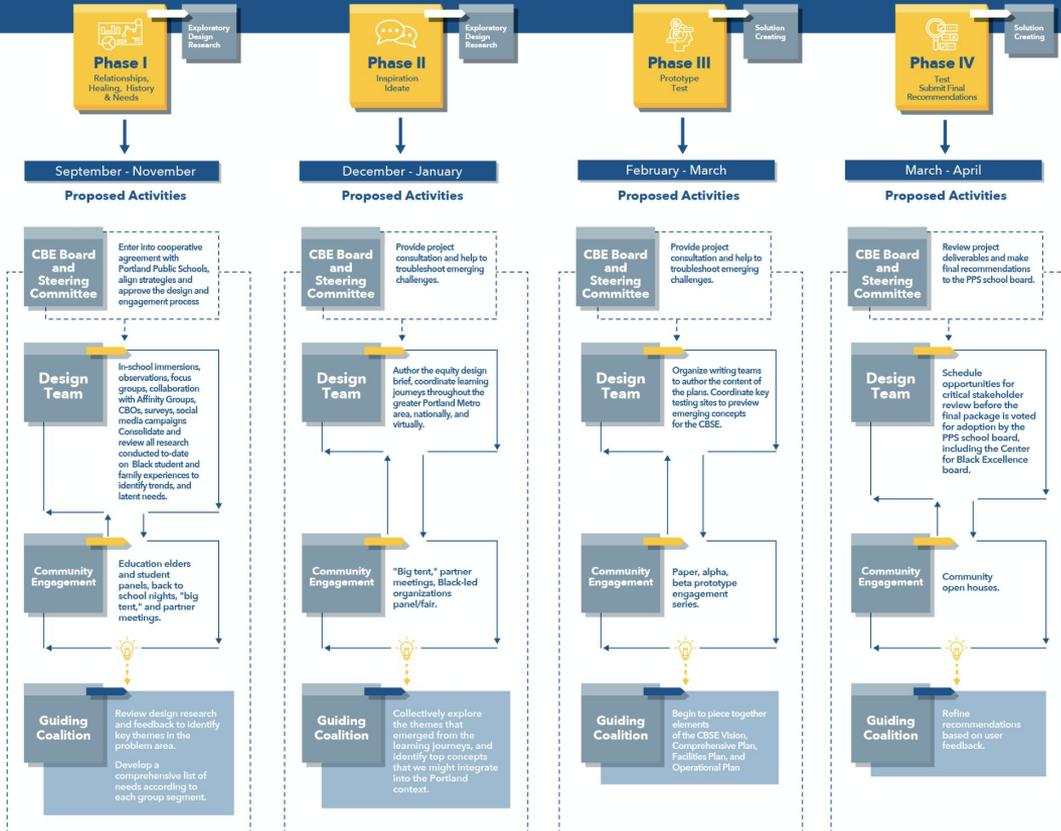
Moving forward, community members can expect a **holistic** discussion about how the built environment supports student experience PK-12.



# Journey Map Design Process 2022-2023



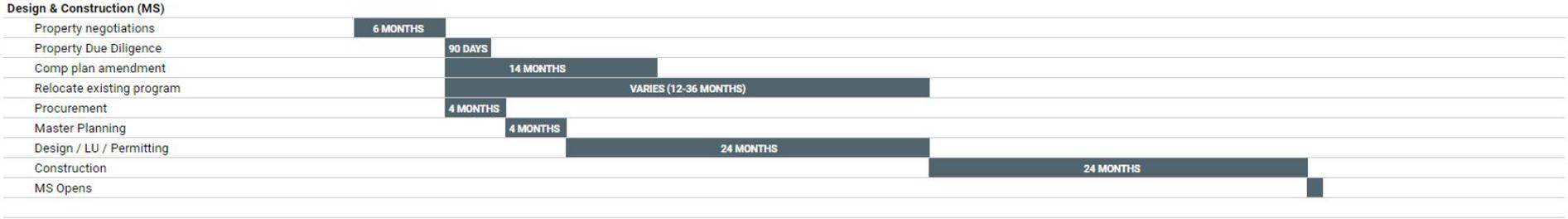
# Draft





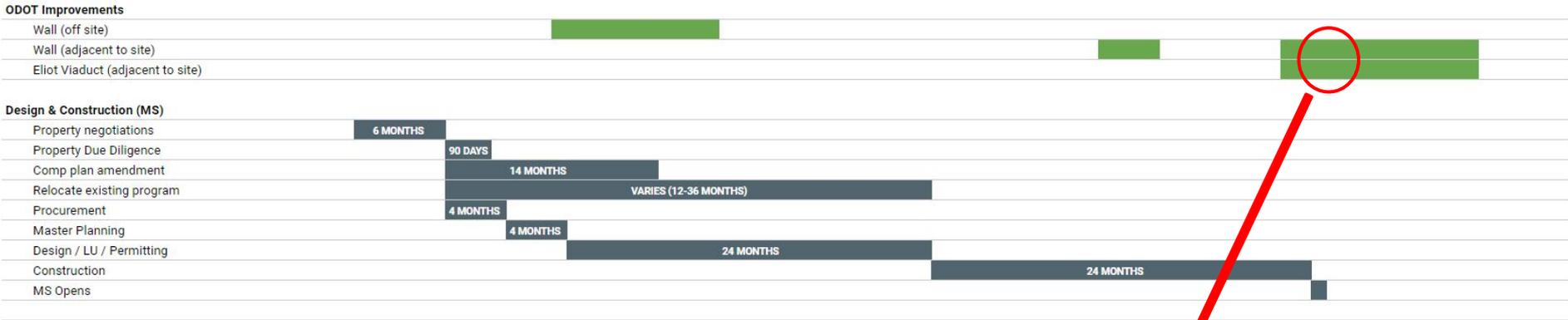
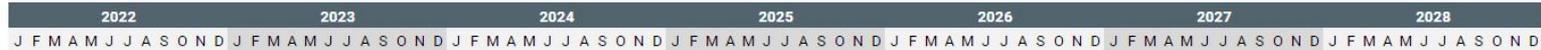
**ORIGINAL CONSTRUCTION SCHEDULE**

2022	2023	2024	2025	2026	2027	2028
J F M A M J J A S O N D	J F M A M J J A S O N D	J F M A M J J A S O N D	J F M A M J J A S O N D	J F M A M J J A S O N D	J F M A M J J A S O N D	J F M A M J J A S O N D

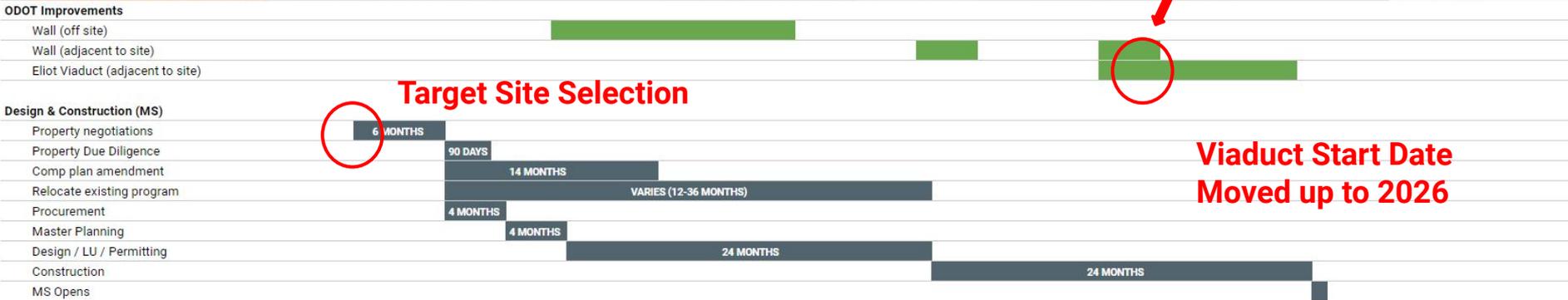
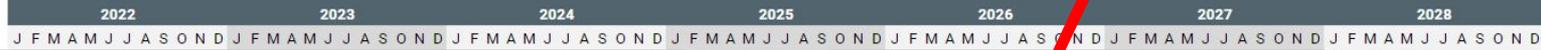




**ORIGINAL CONSTRUCTION SCHEDULE**



**PREVIOUS SCHEDULE**

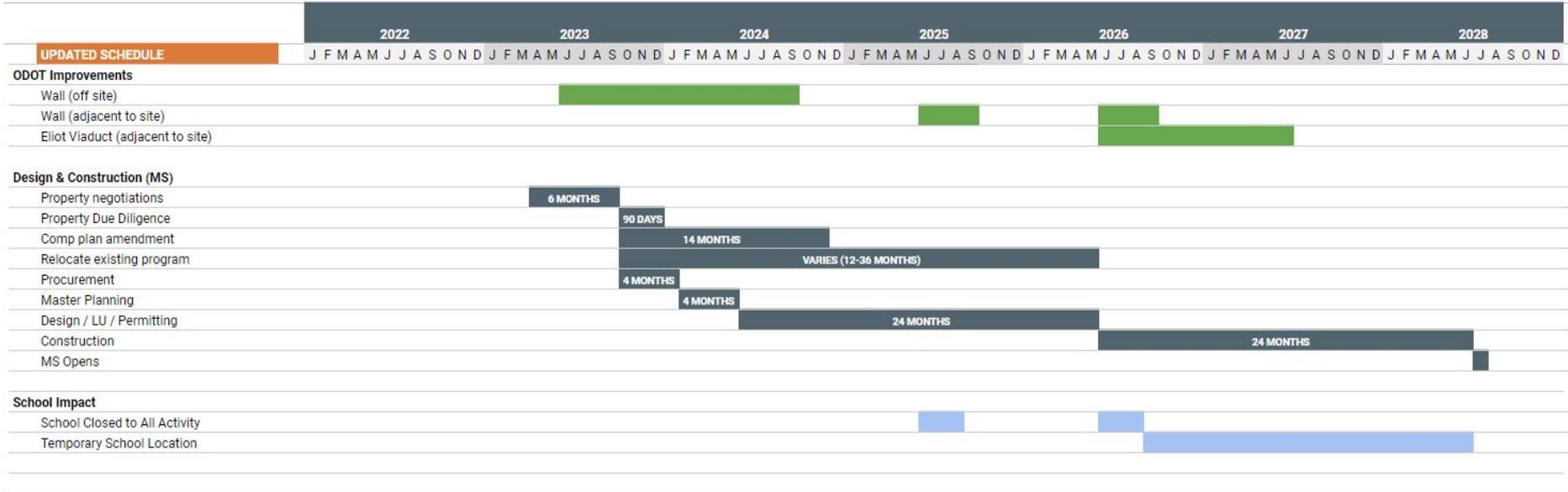


**Target Site Selection**

**Viaduct Start Date Moved up to 2026**



# Schedule Update





# Overview of June Committee Discussion

Phase	Goal	Tradeoffs	Timeline	
			2021	2022
1	Searching for the "perfect" site	None	Green bar	
2	Expanded criteria / expanded search	Small		Green bar with *
3	Expanded criteria / expanded search	Potentially Significant		



# Overview of June Committee Discussion

## Trade Offs to Consider

1. The Tubman relocation process will not displace an existing K5 school
2. Tubman will not be combined with an elementary school and converted to a K8
3. The Tubman relocation process will not alter existing feeder school patterns
4. The Tubman relocation process will not alter JHS' program or enrollment
5. Tubman will continue to be a comprehensive middle school (will not be an alternative or small school)
6. The new Tubman will not be located outside the current Tubman boundary

## Option To Cont. Analysis

1. **BESC (DD Vol. 3 recommendation)**
2. Meek Prof Tech School
3. Jefferson HS (South Lot)
4. Humboldt Site
5. ~~Emanuel~~
6. ~~Lloyd Center~~  
**Jefferson HS (Main Lot)**



# Due Diligence Vol. 4

**HARRIET TUBMAN MIDDLE SCHOOL**  
**(RE)SITING: DUE DILIGENCE V04**





## Due Diligence Vol. 4

- BESC
- Meek Prof Tech School
- Jefferson HS (South Lot)
- Jefferson HS (Main Lot) - colocation
- Humboldt Site + JHS South Lot



# BESC

## Benefits

- Located within existing Tubman boundary
- Owned by PPS
- 10 Acres

## Risks

- A prerequisite of development is successful relocation of existing site functions
- Potentially cost prohibitive
- Surrounding area development may be many years

## Recommendation

- Continue analysis



Concept Layout



# Meek Prof Tech School

## Benefits

- Owned by PPS
- Smaller, but adequately sized for a middle school
- Least cost option
- Residential area

## Risks

- Located outside the Tubman boundary

## Recommendation

- Consider site nonviable. No further analysis at this time.



Concept Layout



# Jefferson HS (south lot)

## Benefits

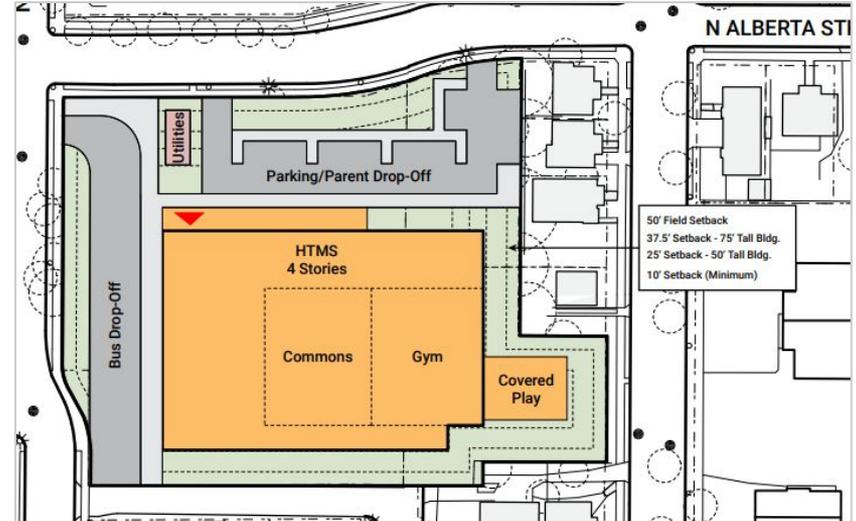
- Located within existing Tubman boundary
- Owned by PPS

## Risks

- Too small to accommodate a comprehensive middle school
- Unavailable for development until 2026
- Impacts to Jefferson HS are material
- No field space

## Recommendation

- Consider site nonviable. No further analysis at this time.



Concept Layout



# Jefferson HS (main lot)

## Benefits

- Located within existing Tubman boundary
- Owned by PPS

## Risks

- Too small to accommodate a comprehensive middle school
- Unavailable for development until 2026
- Has severe negative impact on both schools

## Recommendation

- Consider site nonviable. No further analysis at this time.



Concept Layout



# Humboldt Site + JHS South Lot

## Benefits

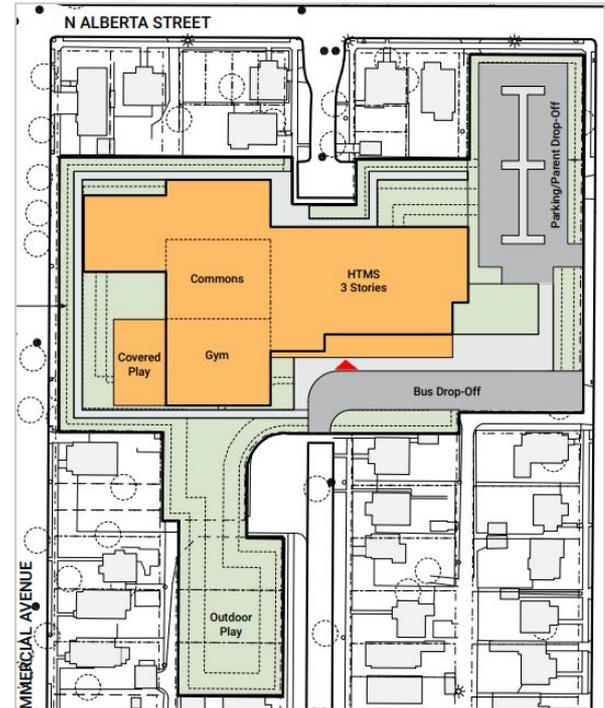
- Located within existing Tubman boundary
- Owned by PPS
- Allows for comprehensive MS
- Provides outdoor play space
- Preserves South Lot for Athletics

## Risks

- Unavailable for development
- Impacts to Jefferson HS

## Recommendation

- Consider site nonviable. No further analysis at this time.



Concept Layout



	Criteria						
	Community Consideration	Academic Suitability	Location	Site Suitability	Availability (Time)	Operational Sustainability	Cost
<b>Under Consideration</b>							
BESC		+	+	0	-	0	-
Meek Prof Tech School		+	-	+	+	+	+
Jefferson High School (South Lot)		-	+	-	-	+	+
Jefferson High School (Main Lot)		-	+	-	-	+	0
Humboldt + JHS South Lot		+	+	0	-	+	+
<b>Previously reviewed. Not considered viable. Not under current consideration</b>							
432 NE Killingsworth			+	0	-	-	-
Boise Eliot Elem			+	0	+	+	+
Concordia University Site			-	+	-	-	-
Emanuel			+	-	-	-	-
Irvington Elem			+	0	+	+	+
Jefferson High School (Main Lot)			+	-	-	-	0
Kenton			-	0	+	+	+
Lloyd Center			0	-	0	-	-
Martin Luther King Elem			+	0	+	+	+
N Stanton			+	-	0	-	0
NE Multnomah			0	+	0	-	-
PBOT Yard			+	-	0	-	0
PP&R (ALBERTA, DAWSON, IRVING)			+	+	0	-	+
Sabin Elem			+	0	+	+	+
Thunderbird Way			+	-	-	-	0
Whitaker-Adams			-	+	+	+	+

**KEY**

- + Positive Site Evaluation
- Negative Site Evaluation
- 0 Neutral Site Evaluation

**Illustrative summary of site assessments intended for discussion purposes**



# Committee Feedback

## STAFF RECOMMENDATION FOR CONTINUED ANALYSIS

**BESC**

## STAFF RECOMMENDATION TO STOP FURTHER ANALYSIS

Meek Prof Tech School  
Jefferson HS (South Lot)  
Jefferson HS (Main Lot)  
Humboldt Site + JHS South Lot



# Next Steps

- Community Engagement
- Due Diligence Vol. 5
  - Further site/design analysis
  - Complete district office financial analysis
  - Continue available property search
  - Continue evaluating new/novel options
- F&O Committee: October & November



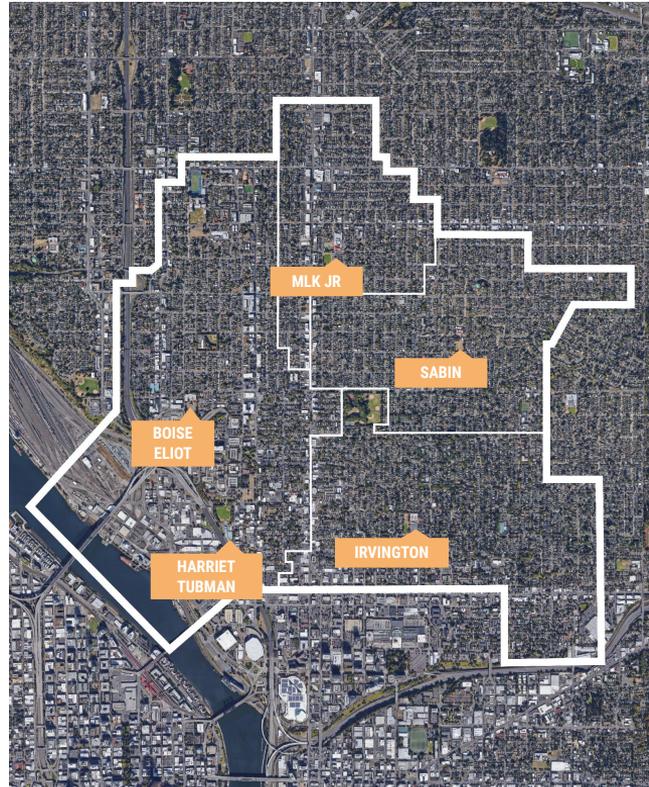
# Questions?



# Resources



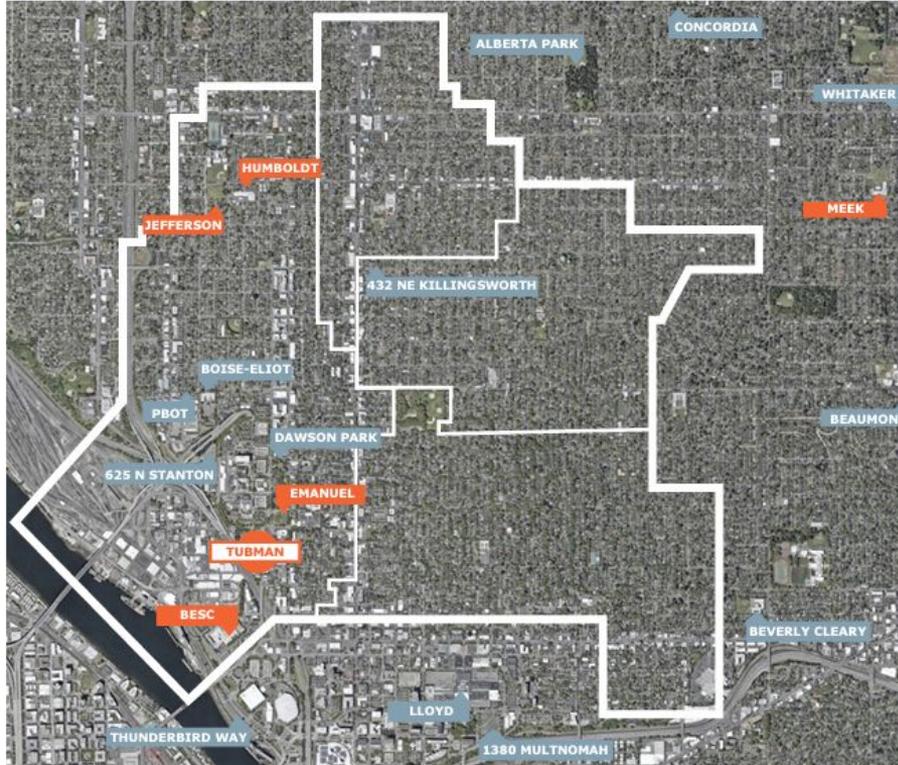
# Tubman Feeder Schools





# Considered Sites

KENTON





**PORTLAND PUBLIC SCHOOLS**  
**OFFICE OF SCHOOL MODERNIZATION**  
501 North Dixon Street / Portland, OR 97227  
Telephone: (503) 916-2222

**Date:** September 22, 2022  
**To:** Facilities and Operations Committee  
**From:** Marina Cresswell, Senior Director, Office of School Modernization  
**Subject:** OSM Quarterly Report

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**BACKGROUND**

In November 2012, May 2017, and November 2020, voters approved general obligation bonds to complete capital improvement projects for Portland Public Schools. The District's Office of School Modernization reports to a citizen Bond Accountability Committee (BAC) on a minimum quarterly basis. Currently the BAC meets every two months.

Bond reporting provided at each BAC meeting include: program administration financial, equity and performance updates; performance audit recommendation updates; and financial progress of the 2017 Bond funds set aside for Health & Safety improvements. Project status updates, including financials, equity, schedule and progress notes, are provided at each meeting on a rotating basis. Special presentations or topics for discussion are also scheduled for each meeting based on BAC input.

**BAC MEETINGS AND MATERIALS FOR THIS REPORT**

The provided documentation for this OSM Quarterly Report includes materials provided to the BAC at the August 11, 2022, meeting. The next BAC meeting was originally scheduled for September 28, 2022, but has been moved to October 5, 2022 to accommodate a schedule conflict.

Project status updates for the 2017 Curriculum and 2020 Technology projects were provided at the August 11, 2022, meeting. The meeting agenda did not include any additional special topics.

**OSM QUARTERLY UPDATE**

The bond program continues to make progress planning, designing and completing capital improvements. The attached documentation provides an overview of recent accomplishments and current status. The current combined (2012/2017/2020) program budget is \$2.78 billion. Roughly \$1.37 billion of that has been spent to date.

The 2012 Bond program continues to close out documentation and financials on completed projects. Once funds are fully reconciled, the Bond program will know whether any additional funds remain that could be used towards 2012 Bond scope-related expenditures. The Grant project is substantially complete and currently in use, with the exception of scoreboards that have been delayed due to pandemic-related supply chain issues, and dugout lighting which is in process of being contracted.

The 2017 Bond program has spent roughly 76% of its current \$926 million budget (budget includes grants, interest earnings, premiums, and other non-Bond funds as part of the overall total). Teams continue to work on closing out the McDaniel HS and Kellogg MS modernization projects that opened to

students in Fall 2021. A baseball/softball field issue was identified at McDaniel HS after school start. Drawings have been submitted for permit, and a construction contract is in process of being executed, with work planned to occur over the late fall/early winter per field availability identified by PIL and the McDaniel athletics department. The issue will be addressed in time for games next year, and the field is fully playable for practice in the meantime. The Lincoln HS modernization has opened the new building to students (Phase 1) and demolition of the old school building and the construction of new athletic fields and Teen Parent Center on the site are underway (Phase 2). The project is on schedule and is currently forecasting savings in the project budget. The Benson and MPG modernization project is under construction and on schedule. 2017 Health and Safety projects to address asbestos, lead paint, security and water quality continue forward. Staff are reviewing budget forecasts in lead paint and water quality to determine if all of the funds previously allocated to those categories will be necessary or can be directed to other 2017 Bond-scope related work. Conversations around how best to utilize those funds are still in early stages.

The 2020 Bond program continues moving forward with technology and curriculum projects, as well as roofing, mechanical, seismic, capacity, ADA, SPED and security projects. Status reports (attached) and presentations (included in main presentation) were provided on 2020 Curriculum and 2020 Technology at the August 11 BAC meeting. In addition to multiple infrastructure projects completed over the summer break, work is moving forward on ADA, SPED and security. Installation of ADA signage and ADA/security classroom door locks has been contracted and contractors are procuring materials. OSM has been working with SPED staff, teachers and community to develop a furniture list, and will be installing mock-ups in several classrooms over winter break to allow for teacher review. Furniture is expected to be installed District-wide starting in April 2023. Design contracts have also been executed and initial design work has begun for the remainder of the ADA and security scopes of work.

The Jefferson Modernization project has been meeting every 2-3 weeks with the Comprehensive Planning Committee (CPC) since June, as well as holding open public Town Halls on the same schedule, providing tables and outreach at several community events over the summer, and reaching out to offer meetings to community groups, neighborhood associations, and PTAs. In addition to the above-noted community engagement opportunities provided by OSM staff, the project has a community engagement consultant that has been extending the outreach, utilizing eight community members with a strong network of connections who have been hired by the consultant to perform specific outreach efforts. Master planning for the Cleveland HS Modernization, Ida B Wells HS Modernization, and Roosevelt Phase V modernization projects will begin in the latter half of next year.

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#### ATTACHMENTS

*BAC Meeting – August 11, 2022:*

- BAC Agenda\_08 11 2022
- BAC Business Equity Utilization Data Constraints
- BAC Presentation\_final\_08 11 2022
- BAC Report\_2017 Health Safety Funding Allocation\_08 11 2022
- BAC Report\_Performance Audit Tracker\_08 11 2022
- BAC Bond Program Administration Report\_08 11 2022
- BAC Project Report\_2020 Curriculum\_08 11 2022
- BAC Project Report\_2020 Technology\_08 11 2022

**Office of School Modernization - Program**  
**July 2022**

**STATUS AT A GLANCE**

Legend:

	As planned: no concerns
	Caution: requires attention
	Impacts: impacts occurring

	As Planned	Caution	Impacts
Budget	X		
Equity		X	
Overall	X		

**EQUITY**

**BUSINESS EQUITY**

**WORKFORCE EQUITY**

		MBE	WBE	SDVBE	ESB	N-C	TOTAL	goal	MIN	goal	FEM	goal	APPR	req
Cumulative	Current	4.77%	7.96%	0.05%	2.70%	0.77%	<b>16.25%</b>	18%	<b>29%</b>	25%	<b>5%</b>	14%	<b>24%</b>	20%
	Prior Report	4.84%	7.89%	0.05%	2.59%	0.76%	16.13%		<b>28%</b>		5%		<b>24%</b>	
12 Month	Current	3.75%	11.66%	0.00%	4.13%	1.42%	<b>20.96%</b>	18%						
	Prior Report	4.26%	10.71%	0.00%	3.65%	1.32%	19.94%							

*Percent of payments made to Certified owned businesses, cumulative and 12-month rolling; Percent of labor hours of apprenticeable trades, cumulative*

**BUDGET**

2012 PROGRAM	BUDGET		FUNDING		PROGRESS		FORECAST	
	Original Budget	Current Budget	Bond Funds	Other Funds	Actuals To Date	Additional Encumbered	Estimate At Completion	Over/Under
Franklin HS Mod	81,585,655	<b>113,022,577</b>	111,040,922	1,981,656	112,932,069	-	<b>112,932,069</b>	(90,508)
Grant HS Mod	88,336,829	<b>158,993,225</b>	155,772,451	3,220,774	158,697,789	159,046	<b>158,856,835</b>	(136,390)
Roosevelt HS Mod	68,418,695	<b>101,631,108</b>	97,127,989	4,503,119	101,631,108	-	<b>101,631,108</b>	-
Faubion Replace	27,035,537	<b>50,115,627</b>	34,109,383	16,006,244	50,028,171	-	<b>50,115,627</b>	-
Grant Upper Field	-	<b>3,246,600</b>	3,246,600	-	2,240,763	898,702	<b>3,246,600</b>	-
RHS Phase IV	-	<b>6,256,244</b>	6,252,016	4,228	6,130,414	22,985	<b>6,256,244</b>	-
Other Projects	123,441,923	<b>118,319,401</b>	113,509,044	4,810,357	118,319,401	-	<b>118,319,401</b>	-
<i>2012 Project Subtotals</i>								<i>(226,898)</i>
Administration	68,117,563	<b>31,482,010</b>	31,278,528	203,482	31,482,010	-	<b>31,482,010</b>	-
Contingency	25,063,798	<b>212,328</b>	212,328	-	-	-	-	(212,328)
<i>2012 Program Subtotals</i>								<i>(212,328)</i>
<b>Totals</b>	<b>482,000,000</b>	<b>583,279,121</b>	<b>552,549,261</b>	<b>30,729,860</b>	<b>581,461,727</b>	<b>1,080,733</b>	<b>582,839,895</b>	<b>(439,226)</b>

**2012 Budget Notes**

99% Spent

- Staff are working through closing out all non-active 2012 commitments and projects, and returning unspent funds to the Program.
- Any remaining 2012 funding will go towards prior add-on project requests at 2012 modernizations (such as additional security cameras at Franklin and Grant).
- Remaining program contingency is being shown for transparency but, as noted above, will go to prior add-on project requests once all other funding sources and expenditures have been reconciled.

Office of School Modernization - Program

July 2022

2017 PROGRAM	BUDGET		FUNDING		PROGRESS		FORECAST	
	Original Budget	Current Budget	Bond Funds	Other Funds	Actuals To Date	Additional Encumbered	Estimate At Completion	Over/Under
Benson HS Mod	202,000,000	<b>153,175,242</b>	141,782,620	11,392,622	73,772,319	79,538,148	<b>154,202,160</b>	1,026,918
Benson Swings	-	<b>13,789,989</b>	13,789,989	-	11,985,470	571,734	<b>12,763,071</b>	(1,026,918)
MPG Building	-	<b>2,021,760</b>	2,021,760	-	2,015,760	-	<b>2,021,760</b>	-
Lincoln HS Repl	187,000,000	<b>242,502,250</b>	242,500,000	2,250	170,737,056	57,415,130	<b>236,440,904</b>	(6,061,346)
Kellogg MS Replace	45,000,000	<b>57,925,586</b>	57,697,500	228,086	57,701,377	164,860	<b>57,784,117</b>	(141,469)
McDaniel Mod	146,000,000	<b>202,717,847</b>	199,000,000	3,717,847	199,353,139	1,212,485	<b>200,720,205</b>	(1,997,643)
Health & Safety	-	<b>155,180,723</b>	126,925,629	28,255,094	135,564,133	4,996,495	<b>155,180,723</b>	-
<i>2017 Project Subtotals</i>								<i>(8,200,458)</i>
Administration	40,000,000	<b>62,057,826</b>	60,441,448	1,616,378	41,841,678	7,440,458	<b>57,517,582</b>	(4,540,244)
Contingency	20,000,000	<b>14,042,317</b>	14,042,317	-	-	-	<b>14,042,317</b>	-
Unallocated H&S	150,000,000	<b>23,074,371</b>	23,074,371	-	-	-	<b>23,074,371</b>	-
<i>2017 Program Subtotals</i>								<i>(4,540,244)</i>
<b>Totals</b>	<b>790,000,000</b>	<b>926,487,910</b>	<b>881,275,634</b>	<b>45,212,277</b>	<b>692,970,932</b>	<b>151,339,311</b>	<b>913,747,209</b>	<b>(12,740,701)</b>

2017 Budget Notes

76% spent

- OSM is working on shifting the MPG project to be 2020-funded per the 2020 Bond measure. 2020 budget has been added to the project, future encumbrances have been shifted to 2020 funds, and current fiscal year expenditures have also been shifted. While discussion occurs regarding shifting prior year expenditures to the 2020 funds, OSM will report MPG across both 2017 and 2020. MPG is being shown in 2017 with the as-yet-unshifted prior year expenditures against 2017 funds. Actuals and Estimate At Completion reflect those numbers as tied to the 2017 funding. The full Estimate At Completion for MPG is \$76,270,189 and is a combination of the provided 2017 EAC and the 2020 EAC numbers for MPG (which include some non-Bond funds).
- The Kellogg Replacement project has returned funds to the 2017 Program. Funds remaining in the project are being held until all remaining project costs are reconciled. The McDaniel Modernization project has funds being held in the project until all project scope has been finalized and completed. The Lincoln Modernization project is now forecasting roughly \$6M under budget but remains under construction, with Phase 2 having just started.
- Similar to MPG, Benson HS Modernization funding is split between 2017 and 2020. The 2017 Benson HS Modernization information shown above reflects 2017 funding and budget only, with actuals and additional encumbered specific to the 2017 funding as well. The Benson Swings shares total budget/funding with Benson HS Modernization, so the "under" amount of budget in the Benson Swings project will be applied to the Benson HS Modernization and is therefore shown as an "over" amount in the Benson HS Modernization line. The total budget for Benson and Benson swings, not including MPG, across all sources of funding (2017 Bond, 2020 Bond, and non-Bond) is \$333.9M.
- An SRGP grant of \$2.5M has been received for Benson HS Modernization and applied after the report date. The grant provides an alternate funding source but does not increase the project budget, as the \$2.5M in bond funds are then returned to 2017 Program contingency. This will show up in the next report as a \$2.5M addition to the Other Funds, with an equal deduction from the Bond Funds, for Benson HS Modernization.
- OSM continues to forecast full use of 2017 Program Contingency for risks due to COVID-related costs on Benson, legal resolution of the CAT issue, and other risk-related issues.

**Office of School Modernization - Program**  
**July 2022**

2020 PROGRAM	BUDGET		FUNDING		PROGRESS		FORECAST	
	Original Budget	Current Budget	Bond Funds	Other Funds	Actuals To Date	Additional Encumbered	Estimate At Completion	Over/Under
Benson 2020 funds	-	<b>166,925,650</b>	166,925,650	-	45,356	145,482,366	<b>166,925,650</b>	-
Jefferson HS Mod	311,000,000	<b>311,000,000</b>	311,000,000	-	-	1,416,469	<b>311,000,000</b>	-
CBSE	60,000,000	<b>60,000,000</b>	60,000,000	-	-	-	<b>60,000,000</b>	-
Cleveland HS Design	20,000,000	<b>20,000,000</b>	20,000,000	-	-	-	<b>20,000,000</b>	-
Wilson HS Design	20,000,000	<b>20,000,000</b>	20,000,000	-	-	-	<b>20,000,000</b>	-
Roosevelt PhV Desigr	2,000,000	<b>2,000,000</b>	2,000,000	-	-	-	<b>2,000,000</b>	-
MPG Building	64,000,000	<b>74,248,429</b>	74,242,429	6,000	2,104,433	69,058,552	<b>74,248,429</b>	-
Curriculum*	53,444,000	<b>71,106,284</b>	53,444,000	17,662,284	19,295,638	21,923,354	<b>71,106,284</b>	-
Technology	128,200,000	<b>134,200,000</b>	128,200,000	6,000,000	50,520,623	18,054,358	<b>119,867,912</b>	(14,332,088)
Infra Projects	-	<b>107,397,634</b>	102,297,634	5,100,000	17,676,554	27,131,082	<b>107,397,634</b>	-
							<i>2020 Project Subtotals</i>	<i>(14,332,088)</i>
Administration	63,098,640	<b>63,104,809</b>	63,098,641	6,168	6,133,033	1,174,769	<b>63,104,809</b>	-
2017 Bond Balance	152,000,000	-	-	-	-	-	-	-
Contingency - OSM	93,257,360	<b>97,663,227</b>	97,663,227	-	-	-	<b>97,663,227</b>	-
Unalloc Proj Funds	241,000,000	<b>138,702,366</b>	138,702,366	-	-	-	<b>138,702,366</b>	-
							<i>2020 Project Subtotals</i>	-
<b>Totals</b>	<b>1,208,000,000</b>	<b>1,266,348,398</b>	<b>1,237,573,946</b>	<b>28,774,452</b>	<b>95,775,637</b>	<b>284,240,950</b>	<b>1,252,016,310</b>	<b>(14,332,088)</b>

**2020 Budget Notes**

8% spent

- As noted above in the 2017 Budget Notes, the MPG project is shown here with just its 2020 funds. Until all prior fiscal year costs been transferred to 2020 funding, MPG will be shown in both the 2017 and the 2020 program financials. The full project Estimate At Completion (with both 2017 and 2020 funding) is \$76,270,189. OSM management and the project team are reviewing potential budget concerns at MPG due to the increased cost of recent trade buy-outs as well as increased costs for builder's risk insurance. Any concerns will be discussed at the Modernizations project updates at the upcoming September 2022 BAC meeting.

OVERALL BOND PROGRAM	BUDGET		FUNDING		PROGRESS		FORECAST	
	Original Budget	Current Budget	Bond Funds	Other Funds	Actuals To Date	Additional Encumbered	Estimate At Completion	Over/Under
<b>Totals</b>	<b>2,480,000,000</b>	<b>2,776,115,430</b>	<b>2,671,398,842</b>	<b>104,716,589</b>	<b>1,370,208,296</b>	<b>436,660,994</b>	<b>2,748,603,414</b>	<b>(27,512,016)</b>

## Office of School Modernization - Program

July 2022

### PROGRAM NOTES

#### Approved Usage of Bond Funds

- OSM continues to work closely with PPS Finance to ensure individual bond expenditures meet bond compensability requirements. A Bond Compensability Committee meets every week to review compensability questions, particularly regarding technology and curriculum expenditures as these are new (to PPS) uses of bond funding.
- All bond-funded projects are reported to the Bond Accountability Committee. Criteria for selection of projects to be funded by the 2017 Health & Safety allocation have been previously presented to the Board and are available on OSM's webpages. Criteria for long-term selection of projects to be funded by 2020 Infrastructure allocations are being developed and will be shared with the BAC and Board shortly. Some roofing, mechanical, and seismic projects related to urgent health and safety needs or grant-matching deadlines have been moved forward, and are included in OSM reports to the BAC and the Board.

#### Bond Budget

- Please see budget notes above for more detailed information by bond measure.

#### Bond Scope

- Active 2012 projects include Grant Upper Field Improvements (small outstanding items). Remaining funds and expenditures need to be fully reconciled to know final remaining funds in program and whether additional projects can be completed.
- The 2017 projects of McDaniel HS Modernization and the Kellogg MS Replacement projects have been occupied. The teams are working through punchlists, small follow-up issues, and closeout. The Lincoln HS Modernization and the Benson HS Modernization projects are under construction. Health & Safety projects addressing asbestos, lead paint, security and water quality continue. Staff are working through returning unused funds from prior Health & Safety projects to the program, to determine next steps for funding additional projects.
- Please see note above about 2020 Infrastructure projects. The Jefferson HS Modernization project has begun meetings with the community-based Comprehensive Plan Committee. Work on the Center for Black Student Excellence currently sits with PPS Community Engagement and other PPS departments, which is moving forward with community engagement that is closely coordinated with Jefferson comprehensive planning engagement efforts. Work on the comprehensive plans and designs for the Cleveland HS Modernization, the Ida B Wells HS Modernization, and Roosevelt Phase 5 will not start until 2023.

#### Bond Schedule

- The Grant Upper Field Improvement construction is primarily complete, however some long lead items, such as the scoreboards, are still outstanding due to pandemic-related supply chain issues.
- McDaniel HS Modernization and the Kellogg MS Replacement projects opened in Fall 2021. Lincoln will open the buildings (Phase 1) to students in Fall 2022 and the Grand Opening Ceremony is scheduled for September 17 at 10am. Work on the athletic fields and teen parent center (Phase 2) will start in Summer 2022. Benson and MPG are on schedule as well. MPG will be holding a Ground Breaking Ceremony on September 10 at 11am.
- Jefferson HS Modernization is slightly behind schedule but anticipates getting back on schedule during comprehensive master planning and design. Comprehensive planning and design for the other modernizations will proceed in 2023 per the previously anticipated schedule. Infrastructure projects are moving forward with urgent needs (see notes above). Pandemic-related supply chain issues continue to present challenges to completing roof replacement projects in a single summer. Some summer 2022 projects may need to split to a second phase in summer 2023 because materials are not available to complete the work prior to start of school in late August.



# **School Improvement Bond Update**

## **Bond Accountability Committee**

### **Meeting**

**August 11, 2022**



## Agenda

- **Welcome & Introductions** 5:30 – 5:40 pm
- **Program Administration Updates** 5:40 – 6:00 pm
- **2020 Curriculum Project Updates** 6:00 – 6:35 pm
- **2020 Technology Project Updates** 6:35 – 7:10 pm
- **Discussion** 7:10 – 7:30 pm
- **Adjourn** 7:30 pm



# Public Comment

*(public comments received via email prior  
to the meeting will be read aloud)*



## Business Equity Utilization Data Constraints

Business equity utilization data from the B2GNow software system represents a point in time and may not fully represent actual payments received by Certified Businesses. The accuracy of the utilization data is contingent on several factors:

- PPS's payment data from Peoplesoft is uploaded into B2GNow monthly and reflects all payments from PPS to prime contractors during the prior month.
- Accurate data on payments to subcontractors is contingent on prime contractors or upper tier subs entering their subcontractors in B2GNow and subsequently self-reporting their monthly payments to each subcontractor in a timely and accurate manner.
- If prime contractors (or first tier subs) enter payments to first tier or subsequent tier subs in a timely manner, the total equity utilization calculation can be expected to accurately reflect contract expenditures as of approximately one to two months prior to the report date.
- If prime contractors (or first tier subs) do not enter payments to first tier or subsequent tier subs in a timely manner, accurate equity utilization data will be delayed, at times significantly. Even closed contracts may be updated later if PPS learns of new subcontractor payments that were made months or even years prior.



# Program Administration Updates



Office of School Modernization - Program  
July 2022

**STATUS AT A GLANCE**

Legend:

- As planned: no concerns
- Caution: requires attention
- Impacts: impacts occurring

	As Planned	Caution	Impacts
Budget	X		
Equity		X	
Overall	X		

**EQUITY**

**BUSINESS EQUITY**

**WORKFORCE EQUITY**

		MBE	WBE	SDVBE	ESB	N-C	TOTAL	goal	MIN	goal	FEM	goal	APPR	req
		Cumulative	Current	4.77%	7.96%	0.05%	2.70%	0.77%	16.25%	18%	29%	25%	5%	14%
	Prior Report	4.84%	7.89%	0.05%	2.59%	0.76%	16.13%		28%		5%		24%	
12 Month	Current	3.75%	11.66%	0.00%	4.13%	1.42%	20.96%	18%						
	Prior Report	4.26%	10.71%	0.00%	3.65%	1.32%	19.94%							

Percent of payments made to Certified owned businesses, cumulative and 12-month rolling; Percent of labor hours of apprenticeable trades, cumulative

**BUDGET**

2012 PROGRAM	BUDGET		FUNDING		PROGRESS		FORECAST	
	Original Budget	Current Budget	Bond Funds	Other Funds	Actuals To Date	Additional Encumbered	Estimate At Completion	Over/Under
Franklin HS Mod	81,585,655	113,022,577	111,040,922	1,981,656	112,932,069	-	112,932,069	(90,508)
Grant HS Mod	88,336,829	158,993,225	155,772,451	3,220,774	158,697,789	159,046	158,856,835	(136,390)
Roosevelt HS Mod	68,418,695	101,631,108	97,127,989	4,503,119	101,631,108	-	101,631,108	-
Faubion Replace	27,035,537	50,115,627	34,109,383	16,006,244	50,028,171	-	50,115,627	-
Grant Upper Field	-	3,246,600	3,246,600	-	2,240,763	898,702	3,246,600	-
RHS Phase IV	-	6,256,244	6,252,016	4,228	6,130,414	22,985	6,256,244	-
Other Projects	123,441,923	118,319,401	113,509,044	4,810,357	118,319,401	-	118,319,401	-
<i>2012 Project Subtotals</i>								<i>(226,898)</i>
Administration	68,117,563	31,482,010	31,278,528	203,482	31,482,010	-	31,482,010	-
Contingency	25,063,798	212,328	212,328	-	-	-	-	(212,328)
<i>2012 Program Subtotals</i>								<i>(212,328)</i>
<b>Totals</b>	<b>482,000,000</b>	<b>583,279,121</b>	<b>552,549,261</b>	<b>30,729,860</b>	<b>581,461,727</b>	<b>1,080,733</b>	<b>582,839,895</b>	<b>(439,226)</b>

**2012 Budget Notes**

99% Spent

- Staff are working through closing out all non-active 2012 commitments and projects, and returning unspent funds to the Program.
- Any remaining 2012 funding will go towards prior add-on project requests at 2012 modernizations (such as additional security cameras at Franklin and Grant).
- Remaining program contingency is being shown for transparency but, as noted above, will go to prior add-on project requests once all other funding sources and expenditures have been reconciled.



Office of School Modernization - Program  
July 2022

2017 PROGRAM	BUDGET		FUNDING		PROGRESS		FORECAST	
	Original Budget	Current Budget	Bond Funds	Other Funds	Actuals To Date	Additional Encumbered	Estimate At Completion	Over/Under
Benson HS Mod	202,000,000	<b>153,175,242</b>	141,782,620	11,392,622	73,772,319	79,538,148	<b>154,202,160</b>	1,026,918
Benson Swings	-	<b>13,789,989</b>	13,789,989	-	11,985,470	571,734	<b>12,763,071</b>	(1,026,918)
MPG Building	-	<b>2,021,760</b>	2,021,760	-	2,015,760	-	<b>2,021,760</b>	-
Lincoln HS Repl	187,000,000	<b>242,502,250</b>	242,500,000	2,250	170,737,056	57,415,130	<b>236,440,904</b>	(6,061,346)
Kellogg MS Replace	45,000,000	<b>57,925,586</b>	57,697,500	228,086	57,701,377	164,860	<b>57,784,117</b>	(141,469)
McDaniel Mod	146,000,000	<b>202,717,847</b>	199,000,000	3,717,847	199,353,139	1,212,485	<b>200,720,205</b>	(1,997,643)
Health & Safety	-	<b>155,180,723</b>	126,925,629	28,255,094	135,564,133	4,996,495	<b>155,180,723</b>	-
							<i>2017 Project Subtotals</i>	<i>(8,200,458)</i>
Administration	40,000,000	<b>62,057,826</b>	60,441,448	1,616,378	41,841,678	7,440,458	<b>57,517,582</b>	(4,540,244)
Contingency	20,000,000	<b>14,042,317</b>	14,042,317	-	-	-	<b>14,042,317</b>	-
Unallocated H&S	150,000,000	<b>23,074,371</b>	23,074,371	-	-	-	<b>23,074,371</b>	-
							<i>2017 Program Subtotals</i>	<i>(4,540,244)</i>
<b>Totals</b>	<b>790,000,000</b>	<b>926,487,910</b>	<b>881,275,634</b>	<b>45,212,277</b>	<b>692,970,932</b>	<b>151,339,311</b>	<b>913,747,209</b>	<b>(12,740,701)</b>

2017 Budget Notes

76% spent

- OSM is working on shifting the MPG project to be 2020-funded per the 2020 Bond measure. 2020 budget has been added to the project, future encumbrances have been shifted to 2020 funds, and current fiscal year expenditures have also been shifted. While discussion occurs regarding shifting prior year expenditures to the 2020 funds, OSM will report MPG across both 2017 and 2020. MPG is being shown in 2017 with the as-yet-unshifted prior year expenditures against 2017 funds. Actuals and Estimate At Completion reflect those numbers as tied to the 2017 funding. The full Estimate At Completion for MPG is \$76,270,189 and is a combination of the provided 2017 EAC and the 2020 EAC numbers for MPG (which include some non-Bond funds).
- The Kellogg Replacement project has returned funds to the 2017 Program. Funds remaining in the project are being held until all remaining project costs are reconciled. The McDaniel Modernization project has funds being held in the project until all project scope has been finalized and completed. The Lincoln Modernization project is now forecasting roughly \$6M under budget but remains under construction, with Phase 2 having just started.
- Similar to MPG, Benson HS Modernization funding is split between 2017 and 2020. The 2017 Benson HS Modernization information shown above reflects 2017 funding and budget only, with actuals and additional encumbered specific to the 2017 funding as well. The Benson Swings shares total budget/funding with Benson HS Modernization, so the "under" amount of budget in the Benson Swings project will be applied to the Benson HS Modernization and is therefore shown as an "over" amount in the Benson HS Modernization line. The total budget for Benson and Benson swings, not including MPG, across all sources of funding (2017 Bond, 2020 Bond, and non-Bond) is \$333.9M.
- An SRGP grant of \$2.5M has been received for Benson HS Modernization and applied after the report date. The grant provides an alternate funding source but does not increase the project budget, as the \$2.5M in bond funds are then returned to 2017 Program contingency. This will show up in the next report as a \$2.5M addition to the Other Funds, with an equal deduction from the Bond Funds, for Benson HS Modernization.
- OSM continues to forecast full use of 2017 Program Contingency for risks due to COVID-related costs on Benson, legal resolution of the CAT issue, and other risk-related issues.



Office of School Modernization - Program  
July 2022

2020 PROGRAM	BUDGET		FUNDING		PROGRESS		FORECAST	
	Original Budget	Current Budget	Bond Funds	Other Funds	Actuals To Date	Additional Encumbered	Estimate At Completion	Over/Under
Benson 2020 funds	-	166,925,650	166,925,650	-	45,356	145,482,366	166,925,650	-
Jefferson HS Mod	311,000,000	311,000,000	311,000,000	-	-	1,416,469	311,000,000	-
CBSE	60,000,000	60,000,000	60,000,000	-	-	-	60,000,000	-
Cleveland HS Design	20,000,000	20,000,000	20,000,000	-	-	-	20,000,000	-
Wilson HS Design	20,000,000	20,000,000	20,000,000	-	-	-	20,000,000	-
Roosevelt PhV Design	2,000,000	2,000,000	2,000,000	-	-	-	2,000,000	-
MPG Building	64,000,000	74,248,429	74,242,429	6,000	2,104,433	69,058,552	74,248,429	-
Curriculum*	53,444,000	71,106,284	53,444,000	17,662,284	19,295,638	21,923,354	71,106,284	-
Technology	128,200,000	134,200,000	128,200,000	6,000,000	50,520,623	18,054,358	119,867,912	(14,332,088)
Infra Projects	-	107,397,634	102,297,634	5,100,000	17,676,554	27,131,082	107,397,634	-
							<i>2020 Project Subtotals</i>	<i>(14,332,088)</i>
Administration	63,098,640	63,104,809	63,098,641	6,168	6,133,033	1,174,769	63,104,809	-
2017 Bond Balance	152,000,000	-	-	-	-	-	-	-
Contingency - OSM	93,257,360	97,663,227	97,663,227	-	-	-	97,663,227	-
Unalloc Proj Funds	241,000,000	138,702,366	138,702,366	-	-	-	138,702,366	-
							<i>2020 Project Subtotals</i>	<i>-</i>
<b>Totals</b>	<b>1,208,000,000</b>	<b>1,266,348,398</b>	<b>1,237,573,946</b>	<b>28,774,452</b>	<b>95,775,637</b>	<b>284,240,950</b>	<b>1,252,016,310</b>	<b>(14,332,088)</b>

2020 Budget Notes

8% spent

- As noted above in the 2017 Budget Notes, the MPG project is shown here with just its 2020 funds. Until all prior fiscal year costs been transferred to 2020 funding, MPG will be shown in both the 2017 and the 2020 program financials. The full project Estimate At Completion (with both 2017 and 2020 funding) is \$76,270,189. OSM management and the project team are reviewing potential budget concerns at MPG due to the increased cost of recent trade buy-outs as well as increased costs for builder's risk insurance. Any concerns will be discussed at the Modernizations project updates at the upcoming September 2022 BAC meeting.

OVERALL BOND PROGRAM	BUDGET		FUNDING		PROGRESS		FORECAST	
	Original Budget	Current Budget	Bond Funds	Other Funds	Actuals To Date	Additional Encumbered	Estimate At Completion	Over/Under
<b>Totals</b>	<b>2,480,000,000</b>	<b>2,776,115,430</b>	<b>2,671,398,842</b>	<b>104,716,589</b>	<b>1,370,208,296</b>	<b>436,660,994</b>	<b>2,748,603,414</b>	<b>(27,512,016)</b>



# 2020 Curriculum Project Updates



2020 Bond - Curriculum  
July 2022

PPS Team Lead: Mary Wiener

### STATUS AT A GLANCE

Legend:

- As planned: no concerns
- Caution: requires attention
- Impacts: impacts occurring

	As Planned	Caution	Impacts
Scope	X		
Budget	X		
Schedule		X	
<b>Overall</b>		X	

### BUDGET

	BUDGET		FUNDING		PROGRESS		FORECAST	
	Original Budget	Current Budget*	Bond Funds	Other Funds*	Actuals to Date*	Additional Encumbered*	Estimate At Completion	Over/Under
Curriculum Program Admin - 5560	1,974,700	<b>6,794,562</b>	2,344,364	4,450,198	238,996	11,941	6,794,562	-
Unallocated Curriculum Funds	13,950,000	-	-	-	-	-	-	-
Climate Change - 5568	950,000	-	-	-	-	-	-	-
Digital Toolkit - 5683	-	<b>8,560,000</b>	7,300,000	1,260,000	5,832,558	534,268	8,560,000	-
Health - 5566	1,281,170	<b>2,066,293</b>	1,281,170	785,123	174,809	9,000	2,066,293	-
Humanities - 5561	12,825,000	<b>19,994,259</b>	14,958,700	5,035,559	1,529,146	14,036,868	19,994,259	-
Math - 5564	6,460,000	<b>15,817,003</b>	11,058,247	4,758,756	7,438,189	6,393,725	15,817,003	-
Physical Education - 5567	2,518,830	<b>3,132,261</b>	2,534,580	597,681	566,023	124,007	3,132,261	-
Science - 5563	6,729,800	<b>7,194,469</b>	6,788,592	405,877	2,363,286	683,316	7,194,469	-
SEL - 5562	1,054,500	<b>1,251,265</b>	1,054,500	196,765	36,408	130,000	1,251,265	-
Visual & Perf Arts - 5565	5,700,000	<b>6,296,172</b>	6,123,847	172,325	1,116,222	229	6,296,172	-
<b>Totals</b>	<b>53,444,000</b>	<b>71,106,284</b>	<b>53,444,000</b>	<b>17,662,284</b>	<b>19,295,638</b>	<b>21,923,354</b>	<b>71,106,284</b>	-

\* Non-Bond budget, funding, expenditures and encumbrances are tracked outside of eBuilder and reported by the Office of Teaching and Learning.



**SCHEDULE**

	2021				2022				2023				2024			
	Q1	Q2	Q3	Q4	Q1	Q2	Q3	Q4	Q1	Q2	Q3	Q4	Q1	Q2	Q3	Q4
Climate Change - 5568	Definition	Definition	Definition	Definition	Selection	Selection	★	Selection	Implementation & Evaluation							
Digital Toolkit - 5683		Selection	Selection	Selection	Selection	Selection	★	Selection								
Health - 5566				Definition	Definition	Definition	★	Selection	Implementation & Evaluation	Implementation & Evaluation						
Humanities - 5561																
<i>K-5 Foundation Skills</i>	Selection	Selection	Implementation & Evaluation	Implementation & Evaluation	Selection	Selection	★	Implementation & Evaluation	Selection	Selection	Implementation & Evaluation	Implementation & Evaluation				
<i>K-5 Humanities</i>		Definition	Definition	Definition	Definition	Selection	★	Selection	Implementation & Evaluation	Implementation & Evaluation	Implementation & Evaluation	Implementation & Evaluation				
<i>6-8 Humanities</i>	Definition	Definition	Selection	Selection	Selection	Selection	★	Implementation & Evaluation								
<i>9-12 Humanities</i>	Definition	Definition	Definition	Definition	Definition	Selection	★	Selection	Implementation & Evaluation	Implementation & Evaluation	Implementation & Evaluation	Implementation & Evaluation				
<i>World Languages</i>	Definition	Definition	Selection	Selection	Selection	Selection	★	Implementation & Evaluation								
Math - 5564																
<i>K-5 Math</i>	Definition	Selection	Implementation & Evaluation	Implementation & Evaluation	Implementation & Evaluation	Implementation & Evaluation	★									
<i>6-12 Math</i>	Definition	Definition	Selection	Selection	Selection	Selection	★	Implementation & Evaluation								
Phys Education - 5567					Definition	Definition	★	Selection	Implementation & Evaluation	Implementation & Evaluation	Implementation & Evaluation	Implementation & Evaluation				
Science - 5563																
<i>K-5 Science</i>							★	Definition	Selection	Selection	Implementation & Evaluation					
<i>6-12 Science</i>	Definition	Selection	Implementation & Evaluation	Implementation & Evaluation	Implementation & Evaluation	Implementation & Evaluation	★	Implementation & Evaluation								
SEL - 5562		Definition	Definition	Selection	Selection	Selection	★	Selection	Selection	Implementation & Evaluation						
Visual & Perf Arts - 5565																
<i>Visual Arts</i>		Definition	Definition	Definition	Definition	Selection	★	Implementation & Evaluation								
<i>Theatre</i>		Definition	Definition	Definition	Definition	Selection	★	Implementation & Evaluation								
<i>Dance</i>		Definition	Definition	Definition	Definition	Selection	★	Implementation & Evaluation								
<i>Music</i>		Definition	Definition	Definition	Definition	Selection	★	Implementation & Evaluation								

Baseline
 Definition
  Selection
  Implementation & Evaluation

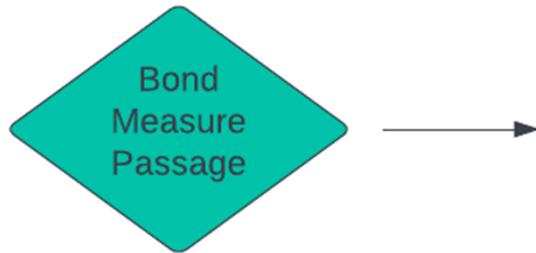
# Bond Accountability Committee

Instructional Material/Curriculum Adoptions

August 11, 2022

# SCHEDULE HISTORY

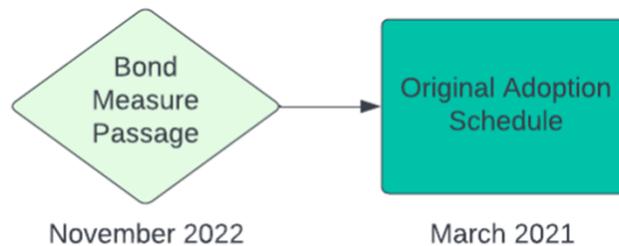
BOND LANGUAGE: “Provide comprehensive, culturally relevant, and current curriculum materials across core and supplemental subject areas;”



November 2022

# SCHEDULE HISTORY

Adoption SY 20/21 Implementation SY 21/22	Adoption SY 21/22 Implementation SY 22/23	Adoption SY 22/23 Implementation Yr 23/24	Adoption SY 23/24 Implementation SY 24/25
K-5 Mathematics	6-12 Humanities (Social Sciences/Language Arts)	Health	K-5 Science
K-3 Foundational Skills	World Languages	Physical Education	
K-5 Spanish Dual Language Immersion	Social Emotional Learning	K-5 Humanities	
Climate Change/Climate Justice	Visual & Performing Arts		
6-8 Science	6-12 Mathematics		



# SCHEDULE HISTORY

Adoption SY 20/21 Implementation SY 21/22	Adoption SY 21/22 Implementation SY 22/23	Adoption SY 22/23 Implementation Yr 23/24	Adoption SY 23/24 Implementation SY 24/25
K-5 Mathematics	6-12 Mathematics	K-12 Social Sciences	K-5 Science
K-3 Foundational Skills	World Languages	English as a Second Language (ESL)	Social Emotional Learning Phase (III)
K-5 Spanish Dual Language Immersion	Social Emotional Learning (Phase I)	Visual & Performing Arts (VAPA)	
6-8 Science	K-12 Language Arts	Social Emotional Learning (Phase II)	
	K-12 Health & PE		



## January to August 2022

- Successfully met Division 22 Goals for SY21/22, with the following adoptions:
  - K-5 Language Arts- Great Minds: Wit & Wisdom
  - 6-12 Language Arts- HMH: Into Literature
  - 6-8 Mathematics- MidSchoolMath
  - 9-12 Mathematics- McGraw Hill: Illustrative Mathematics
  - 6-12 World Languages/Continuing Dual Language Immersion (Klett, Vista Higher Learning, Wayside & Cengage)
  - Social Emotional Learning- Caring School Communities
  - K-12 Health- Nest
  - 9-12 PE- OpenUp
- Executed successful professional development (PD) with teachers in June 2022 (additional pd planned for August 2022 and September 2022)

## Concerns

- Financially being able to complete all adoptions with Bond and General Funds. Inflation has affected the cost of curriculum and we are anticipating general fund budget cuts.
- Being able to continue to provide robust professional development with limited opportunities to do so, although this is changing with the development of the Teacher Professional Learning (TPL) department under the Office of Teaching & Learning (OTL).

# Questions



# 2020 Technology Project Updates



2020 Bond - Technology  
July 2022

PPS Team Lead: Don Wolff

### STATUS AT A GLANCE

Legend:

- As planned: no concerns
- Caution: requires attention
- Impacts: impacts occurring

	As Planned	Caution	Impacts
Scope		X	
Budget		X	
Schedule		X	
Overall		X	

### BUDGET

	BUDGET		FUNDING		PROGRESS		FORECAST	
	Original Budget	Current Budget	Bond Funds	Other Funds	Actuals to Date	Additional Encumbered	Estimate At Completion	Over/Under
Tech Program Admin - 5519	23,264,652	<b>30,111,682</b>	27,497,009	2,614,673	1,072,715	3,665,151	<b>20,679,469</b>	(9,432,212)
Classroom Modernization - 5516	24,780,325	<b>23,793,677</b>	23,743,677	50,000	8,276,119	3,299,220	<b>24,415,408</b>	621,731
Device Replacement - 5515	31,006,443	<b>38,703,141</b>	38,667,814	35,327	31,683,891	7,019,251	<b>43,398,239</b>	4,695,097
ERP Replacement Planning - 5518	11,107,080	<b>3,350,000</b>	250,000	3,100,000	98,225	-	<b>14,187,130</b>	10,837,130
Infrastructure & Security - 5517	38,041,500	<b>38,241,500</b>	38,041,500	200,000	9,389,672	4,043,838	<b>17,187,666</b>	(21,053,834)
<b>Totals</b>	<b>128,200,000</b>	<b>134,200,000</b>	<b>128,200,000</b>	<b>6,000,000</b>	<b>50,520,623</b>	<b>18,027,459</b>	<b>119,867,912</b>	<b>(14,332,088)</b>

### SCHEDULE

	2022				2023				2024				2025			
	Q1	Q2	Q3	Q4												
Tech Program Admin - 5519			★													
Classroom Modernization - 5516																
<i>Analysis/Planning</i>			★													
<i>Procurement</i>			★													
<i>Placement</i>			★													
Device Replacement - 5515			★													
ERP Replacement Planning - 5518			★													
Infrastructure & Security - 5517																
<i>Analysis/Planning</i>			★													
<i>Procurement</i>			★													
<i>Placement</i>			★													

Baseline
 Analysis/Planning
  Procurement
  Distribution
  Placement



# Bond 2020 Technology Improvements

Bond Accountability Committee  
August 2022 Updates

5515

DEVICE REFRESH

5516

CLASSROOM TECH STANDARDIZATION

5517

INFRASTRUCTURE AND SECURITY

5518

ERP ORGANIZATIONAL READINESS

5519

IMPLEMENTATION ADMINISTRATION

**BOND 2020 TECHNOLOGY  
IMPROVEMENTS  
DETAILS**

### **5515 Device Replacement**

- Original Bond 2020 did not take into account the lost 1:1 devices or new students so an additional chromebooks were purchased in 2022 to cover those.
- Support staff device scope was extended to include the Rice, CTP and DART programs.

### **5516 Classroom Standardized Tech**

- A second classroom lanyard mic was added into each classroom for student engagement mic, as a backup when the teacher mic for when there is a second teacher, or if the teacher mic is charging.
- Additional 8 Whiteboard layouts: environmental contractor, asbestos abatement contractors, general contractor for additional whiteboard installation and design scope.
- Gear storage costs and transportation costs for the teacher station gear to be delivered to the schools. 64% of our equipment is stored at Rose City storage due to lack of space at BESC.
- Teacher station computers refresh scope was extended to include the Rice, CTP, and DART programs.

### **5517 Security and Infrastructure**

- Gym emergency button installation to call the front office/ security or 911 was not originally earmarked as part of this project but is part of the physical security infrastructure similar to wall-mounted classroom phones.

### **5519 Program Administration**

- Translation costs was not originally budgeted for school community project updates
- Project status signage was added on for on-site project updates

## Reduced Scope

### 5518 ERP Replacement -> ERP Organizational Readiness

- There were not enough Bond 2020 funds originally budgeted to cover all the analysis, documentation, RFP development and the full replacement of the ERP system. So the current 5518 budget will be spent on all of the work needed to get up to that RFP point but not implementation.



# 5515 DEVICE REPLACEMENT:

51,968 Devices currently deployed across the district!

Completed:

TEACHERS

Pixelbook and a Chromebook 4,100

LICENSED NON-CLASSROOM

Chromebook 800

ADMINISTRATORS

Desktop or Laptop 350

GRADES 3-12  
1:1 Chromebook & Case

8,000

GRADES PK-2  
ASSISTIVE TECH  
2:1 Chromebook and  
Tech Cart per  
Classroom

37,000

Completed:

K-5th GRADE MEDIA CENTERS  
In-Library Usage

Currently In Process  
MEDIA CENTER  
CIRCULATION DESK

SUPPORT STAFF  
7 High School, 5 Middle  
School, 3 Elementary  
School

56 Total Tech  
Carts Include  
1,232 Total  
Chromebooks

86 DESKTOPS

390 Desktops +  
10 Laptops for HS  
Business  
Managers



# IMPLEMENTATION 5515



## 5516 CLASSROOM TECH STANDARDIZATION

- In-classroom and school-wide Wi-fi means faster connectivity for all devices
- A wall-mounted phone by the door in each classroom
- New teacher station will include a Chrome desktop computer, monitor, keyboard, new cables to use the existing document camera
- New Lightspeed teacher audio amplification, teacher lanyard mic, and a student engagement mic
- New wall-mounted laser projectors and glare-free whiteboards
  - If there is not enough space for a projector, a 65" TV will be utilized with a wall-mount or cart
- New Airtame 2 units will connect to the projector (or TV) and will allow any student or teacher to share from their device in the classroom for increased engagement and learning opportunities.
- 20% new CD/DVD players will be available at the Media Center for check out.
  - Please note the existing in-classroom tech carts will still be used in the classrooms since they were not a pre-budgeted for expenses as part of Bond 2020.

## IMPLEMENTATION 5516

Classroom Tech will be installed in each classroom including vocational teaching spaces in addition to the Media Centers

### Before

Drop down projector screen,  
non-wall-mounted bulb projector,  
Windows PC



### After

3 new dry erase boards with non-glare surface in the middle, wall-mounted laser projector, Chrome desktop computer, larger 22" monitor, teaching mic and student engagement mic, wall-mounted phone by the classroom door



## 5517 INFRASTRUCTURE & SECURITY

### NETWORK

- ADD WIRELESS ACCESS POINTS (WAP) IN-CLASSROOMS
- WAP REFRESH FOR EXISTING WAPS
- REFRESH ALL SWITCHES
- FIBER INTERCONNECTS

### SECURITY

- INTERNAL FIREWALL INSTALLATION: **1% COMPLETED**
- SECURITY AUDIT: **COMPLETED**
- CYBER SECURITY EDUCATION AND AWARENESS TRAINING: 6 Per Academic Year Starting Fall 2022
- SECURITY PROGRAM DASHBOARD: **1% COMPLETED**
- **ADDITIONAL SECURITY PROJECTS: COMPLETED:**
  - 2 Factor Authentication Enrollment for all staff
  - Password Recovery Enrollment for all staff

### PHONE SYSTEM

- UPGRADE PHONE SYSTEM: **COMPLETED**
- REPLACE ALL HANDSETS **COMPLETED**
- ENABLE VOIP SOFTPHONE **COMPLETED**
- NEW CONFERENCE ROOM PHONE (1 PER SCHOOL)

5518

**ENTERPRISE RESOURCE PLANNING**  
**(ERP) ORGANIZATIONAL**  
**READINESS**



## 5518 ERP ORGANIZATIONAL READINESS

### CURRENT STAGE: BUSINESS ASSESSMENT

WORK WITH SUBJECT MATTER EXPERT CONSULTANTS TO LEARN CURRENT PROCESSES

DETERMINE REQUIREMENTS & BEST PROCESSES FOR RFP DEVELOPMENT



### FUTURE PHASE: RFP DEVELOPMENT

GATHER REQUIREMENTS AND FUNCTIONALITY NEEDED IN THE NEW ERP

DEVELOP THE RFP MATERIALS & PROCESS

### ERP SYSTEM PROCESS

DEVELOP BEST PRACTICES TO BE EMPLOYED AND SUPPORTED IN THE RFP SYSTEM NEXT

In Collaboration With ERP Change Management Subject Matter Experts From:

**Gartner**



Front Office Project Flier



**PORTLAND  
PUBLIC  
SCHOOLS**

**Boise-Eliot/  
Humboldt  
Elementary School**

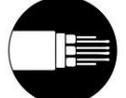
Bond 2020 Educational  
Technology Improvement



**Wireless Upgrade**  
Modernización inalámbrica  
Nâng Cấp Không Dây  
无线升级  
Беспроводные устройства  
Casriyeynta Wireless-ka



**Classroom Tech**  
Tecnología en el aula  
Công Nghệ Lớp Học  
课堂技术  
Технологии в классах  
Tignoolayladda fasalka



**Fiber Upgrade**  
Modernización de la fibra  
Nâng Cấp Cáp Quang  
光纤升级  
Волоконные соединения  
Horumarinta Fiber-ka

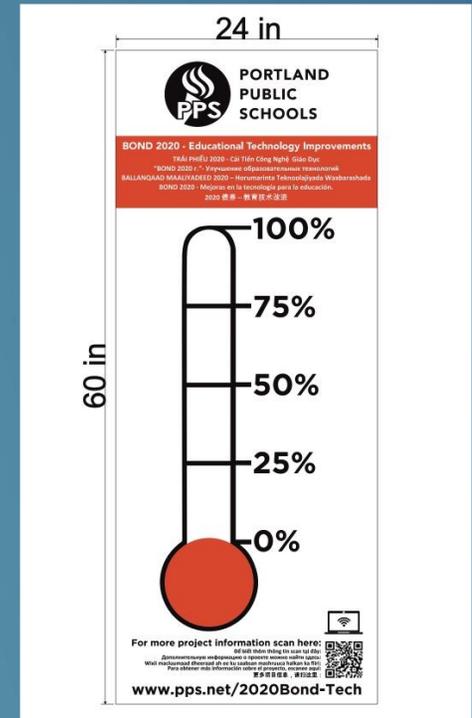
[pps.net/2020Bond-Tech](http://pps.net/2020Bond-Tech)



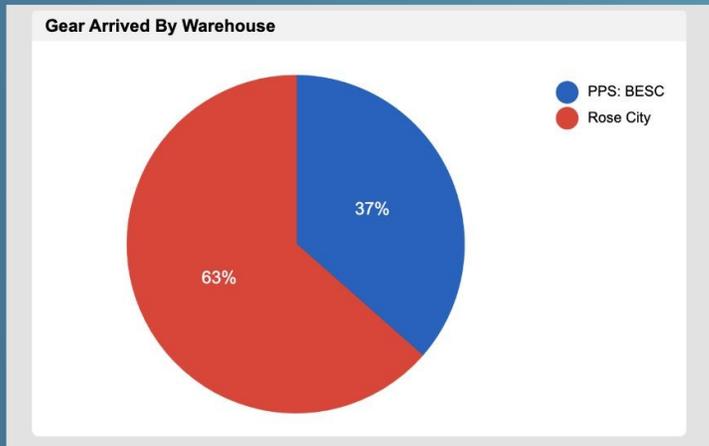

# 5519 IMPLEMENTATION ADMINISTRATION

- DESIGN SUPPORT
- PROJECT MANAGEMENT
- IMPLEMENTATION SUPPORT
- ENGINEERING SUPPORT
- INSTALLATION SUPPORT
- SECURITY ENGINEERING
- WEBPAGE CONTENT TRANSLATIONS
- SIGNAGE PRINTING COSTS

## In-School Project Status Update Signage



## PROJECT SCHEDULE RISK REDUCTION



## ITEMS NOT IN SCOPE FOR BOND 2020

- New tech carts
- Auditorium AV equipment
- Gym AV equipment
- Teacher lounge AV equipment
- Outside AV or display equipment
- Cafeterias AV equipment
- Common space AV equipment
- Bond 2012 or Bond 2017 classroom tech or wireless refresh
- Full ERP Replacement Implementation

Due to the large volume of equipment needed for the Bond 2020 projects equipment was purchased in bulk and stored at Rose City Storage until the implementation phase. This is how we have reduced the risk of shipping delays and out of stock equipment.



Any Questions?



## RESOURCES:

Best spot for Bond 2020 updates for the community: <https://www.pps.net/2020Bond-Tech>

Best spot for Principals, teachers, support staff to ask questions and get updates each month virtually August-April: <https://www.pps.net/techtownhall>



# Discussion



# Adjourn

**Next meeting:  
September 28, 2022  
5:30 pm**

**STATUS AT A GLANCE**

Legend:

	As planned: no concerns
	Caution: requires attention
	Impacts: impacts occurring

	As Planned	Caution	Impacts
Scope	X		
Budget	X		
Schedule		X	
<b>Overall</b>		X	

**BUDGET**

	BUDGET		FUNDING		PROGRESS		FORECAST	
	Original Budget	Current Budget*	Bond Funds	Other Funds*	Actuals to Date*	Additional Encumbered*	Estimate At Completion	Over/Under
Curriculum Program Admin - 5560	1,974,700	<b>6,794,562</b>	2,344,364	4,450,198	238,996	11,941	6,794,562	-
Unallocated Curriculum Funds	13,950,000	-	-	-	-	-	-	-
Climate Change - 5568	950,000	-	-	-	-	-	-	-
Digital Toolkit - 5683	-	<b>8,560,000</b>	7,300,000	1,260,000	5,832,558	534,268	8,560,000	-
Health - 5566	1,281,170	<b>2,066,293</b>	1,281,170	785,123	174,809	9,000	2,066,293	-
Humanities - 5561	12,825,000	<b>19,994,259</b>	14,958,700	5,035,559	1,529,146	14,036,868	19,994,259	-
Math - 5564	6,460,000	<b>15,817,003</b>	11,058,247	4,758,756	7,438,189	6,393,725	15,817,003	-
Physical Education - 5567	2,518,830	<b>3,132,261</b>	2,534,580	597,681	566,023	124,007	3,132,261	-
Science - 5563	6,729,800	<b>7,194,469</b>	6,788,592	405,877	2,363,286	683,316	7,194,469	-
SEL - 5562	1,054,500	<b>1,251,265</b>	1,054,500	196,765	36,408	130,000	1,251,265	-
Visual & Perf Arts - 5565	5,700,000	<b>6,296,172</b>	6,123,847	172,325	1,116,222	229	6,296,172	-
<b>Totals</b>	<b>53,444,000</b>	<b>71,106,284</b>	<b>53,444,000</b>	<b>17,662,284</b>	<b>19,295,638</b>	<b>21,923,354</b>	<b>71,106,284</b>	-

\* Non-Bond budget, funding, expenditures and encumbrances are tracked outside of eBuilder and reported by the Office of Teaching and Learning.

# SCHEDULE

	2021				2022				2023				2024			
	Q1	Q2	Q3	Q4												
Climate Change - 5568							★									
Digital Toolkit - 5683							★									
Health - 5566							★									
Humanities - 5561																
<i>K-5 Foundation Skills</i>							★									
<i>K-5 Humanities</i>							★									
<i>6-8 Humanities</i>							★									
<i>9-12 Humanities</i>							★									
<i>World Languages</i>							★									
Math - 5564																
<i>K-5 Math</i>							★									
<i>6-12 Math</i>							★									
Phys Education - 5567							★									
Science - 5563																
<i>K-5 Science</i>							★									
<i>6-12 Science</i>							★									
SEL - 5562							★									
Visual & Perf Arts - 5565																
<i>Visual Arts</i>							★									
<i>Theatre</i>							★									
<i>Dance</i>							★									
<i>Music</i>							★									

Baseline

Definition

Selection

Implementation & Evaluation

## PROJECT NOTES

### Progress:

PPS is now solidly on the way to being in compliance with Oregon Department of Education's (ODE) curriculum adoption schedule.

From April 2022 to June 2022, PPS adopted new resources in the following, in alignment with the corrective action schedule set by ODE:

- K-12 English Language Arts
- 6-12 Mathematics
- K-12 World Languages/Dual Language Immersion Programs
- K-12 Health, K-12 Social Emotional Learning (Phase I)
- 9-12 Physical Education.

In Fall 2022, PPS will begin work on the following, with implementation slated for Fall 2023:

- K-12 Social Studies
- K-12 English Language Learning
- K-12 Visual & Performing Arts and Social Emotional Learning (Phase II)

### Accomplishments:

Our major accomplishments include:

1. Adopting new materials for K-12 English Language Arts, 6-12 Mathematics, K-12 World Languages/Dual Language Immersion Programs, K-12 Health, K-12 Social Emotional Learning (Phase I), and 9-12 Physical Education.
2. Successful professional development on new materials for 750+ educators with additional professional development sessions slated for August 15-17th and August 25th.

### Risks:

We are currently facing dramatic inflation in the cost of curriculum, as with many other goods/services, this has caused us to make very selective choices on the materials we are adopting. We are currently on track to have enough bond funding to complete all adoptions, but this is something to be monitored.

**STATUS AT A GLANCE**

Legend:

	As planned: no concerns
	Caution: requires attention
	Impacts: impacts occurring

	As Planned	Caution	Impacts
Scope		X	
Budget		X	
Schedule		X	
<b>Overall</b>		X	

**BUDGET**

	BUDGET		FUNDING		PROGRESS		FORECAST	
	Original Budget	Current Budget	Bond Funds	Other Funds	Actuals to Date	Additional Encumbered	Estimate At Completion	Over/Under
Tech Program Admin - 5519	23,264,652	<b>30,111,682</b>	27,497,009	2,614,673	1,072,715	3,665,151	<b>20,679,469</b>	(9,432,212)
Classroom Modernization - 5516	24,780,325	<b>23,793,677</b>	23,743,677	50,000	8,276,119	3,299,220	<b>24,415,408</b>	621,731
Device Replacement - 5515	31,006,443	<b>38,703,141</b>	38,667,814	35,327	31,683,891	7,019,251	<b>43,398,239</b>	4,695,097
ERP Replacement Planning - 5518	11,107,080	<b>3,350,000</b>	250,000	3,100,000	98,225	-	<b>14,187,130</b>	10,837,130
Infrastructure & Security - 5517	38,041,500	<b>38,241,500</b>	38,041,500	200,000	9,389,672	4,043,838	<b>17,187,666</b>	(21,053,834)
<b>Totals</b>	<b>128,200,000</b>	<b>134,200,000</b>	<b>128,200,000</b>	<b>6,000,000</b>	<b>50,520,623</b>	<b>18,027,459</b>	<b>119,867,912</b>	<b>(14,332,088)</b>

**SCHEDULE**

	2022				2023				2024				2025			
	Q1	Q2	Q3	Q4												
Tech Program Admin - 5519			★													
Classroom Modernization - 5516																
<i>Analysis/Planning</i>			★													
<i>Procurement</i>			★													
<i>Placement</i>			★													
Device Replacement - 5515			★													
ERP Replacement Planning - 5518			★													
Infrastructure & Security - 5517																
<i>Analysis/Planning</i>			★													
<i>Procurement</i>			★													
<i>Placement</i>			★													

Baseline		Analysis/Planning		Procurement		Distribution		Placement
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## PROJECT NOTES

### Progress:

Classroom Modernization: School group 1 implementation is still underway (Cesar Chavez, Boise-Eliot, Lane and George). School group 3 design phase starts soon.

Device Replacement: The support staff device replacement will be finished up by the end of August.

ERP Replacement Planning: Business case is completed.

Infrastructure & Security: Firewall planning and analysis phase is underway. The data center storage area network will be completed in August. Data center server and Data center switches installation phase is underway and will be completed this December.

### Accomplishments:

Classroom Modernization: School groups 1 and 2 teaching computer station installation is completed and school group 2 LV contractor design phase is completed (Cleveland, Roseway Heights, Meek, Jefferson, and Ida B. Wells).

Device Replacement: Admin device replacement finished up June 30th.

### Risks:

Classroom Modernization: Additional whiteboard scope has cause schedule delays. It is currently earmarked to be completed J and could have budget risk.

Device Replacement: Admin device replacement finished up June 30th.

ERP Replacement Planning: There wasn't enough budget for full ERP replacement, so it was rescoped to include all work up until the implementation stage.

Infrastructure & Security: The project is still experiencing shipping delays for orders placed last summer (mostly WAPs and switches) that has caused project schedule delays.

## 2017 Health &amp; Safety Funding Allocation

July 2022

	Total Funds	Spent To Date	Balance	Unalloc Balance
<b>Bond Fund Category: DS001 - Accessibility</b>	<b>9,200,000</b>	<b>8,944,398</b>	<b>255,602</b>	<b>Accessibility</b>
<i>Project Name: 2017 Bond Program</i>	47,361	-	47,361	47,361
Project Name: GROUP 3 (IP 2017)	3,593,412	3,417,799	175,613	
Project Name: Harrison Park - Partial Re-Roof-Bond - 5321 - FY20	45,000	45,000	-	
Project Name: Multiple Sites - 2018-2019 Middle School Conversions - 4586-FY18	4,411,028	4,378,400	32,628	
Project Name: Ockley Green - Partial Re-Roof-Bond - 5322 - FY20	45,000	45,000	-	
Project Name: Rigler - Health & Safety Improvements-Bond - 5029 - FY19	1,013,199	1,013,199	0	
Project Name: Woodlawn - Partial Re-Roof-Bond - 5323 - FY20	45,000	45,000	-	
<b>Bond Fund Category: DS002 - Asbestos Remediation</b>	<b>11,040,000</b>	<b>5,663,927</b>	<b>5,376,073</b>	<b>Asbestos</b>
<i>Project Name: 2017 Bond Program</i>	2,638,819	-	2,638,819	2,638,819
Project Name: Beaumont - 2020 Asbestos Abatement-Bond - 5373 - FY20	169,985	169,985	-	
Project Name: Capitol Hill - 2020 Asbestos Abatement-Bond - 5275 - FY20	93,134	93,134	-	
Project Name: Chapman - 2020 Asbestos Abatement-Bond - 5377 - FY20	89,983	89,983	-	
Project Name: Gray - 2021 Asbestos Abatement-Bond - 5673	123,025	123,025	-	
Project Name: Gray - Asbestos Abatement- Bond - FY22 - 5947	72,490	-	72,490	
Project Name: GROUP 3 (IP 2017)	66,361	66,361	-	
Project Name: GROUP 4 - ASBESTOS	1,392,403	1,392,403	-	
Project Name: Harrison Park - Asbestos Abatement - Bond - 5946 - FY22	128,881	-	128,881	
Project Name: Harrison Park - Copy Room-Abate Asbestos Tile - 4664 - FY18	10,185	10,185	-	
Project Name: Harrison Park - K Classrooms-Abate Asbestos from floor tiles - 4441 - FY18	24,009	24,009	-	
Project Name: Hosford - 2020 Asbestos Abatement-Bond - 5363 - FY20	199,986	199,986	-	
Project Name: Hosford - 2021 Asbestos Abatement-Bond - 5671	77,262	77,262	-	
Project Name: Hosford - Wood Shop Floor-Asbestos - 4573 - FY18	41,523	41,523	-	
Project Name: Jackson - Health & Safety Improvements-Bond - 5030 - FY19	-	-	-	
Project Name: Jefferson - 2021 Asbestos Abatement-Bond - 5672	34,738	34,738	-	
Project Name: King - 2022 Asbestos Abatement - Bond - 5949 - FY22	884,213	-	884,213	
Project Name: Lane - 2020 Asbestos Abatement-Bond - 5361 - FY20	89,849	89,849	-	
Project Name: Multiple Sites - 2018-2019 Middle School Conversions - 4586-FY18	658,511	638,502	20,009	
Project Name: Multiple Sites - Asbestos Bond Projects-2018-19 - 4923 - FY19	1,254,069	1,254,069	-	
Project Name: Multiple Sites - Asbestos Bond Projects-2019-20 - 4924 - FY20	45,128	45,128	-	
Project Name: Multiple Sites - Asbestos Bond Projects-2020-21 - 4925 - FY21	233,410	123,717	109,694	
Project Name: Multiple Sites - Asbestos Bond Projects-2021-22 - 5826 - FY22	113,192	58,319	54,873	
Project Name: Multiple Sites - Floor Replacement-Bond Compensible - 4565 - FY18	101,044	101,044	-	
Project Name: Rigler - 2020 Asbestos Abatement-Bond - 5369 - FY20	177,837	177,837	-	
Project Name: Stephenson - 2020 Asbestos Abatement-Bond - 5362 - FY20	150,288	150,288	-	
Project Name: Stephenson - 2022 Asbestos Abatement - Bond - 5950 - FY22	237,930	-	237,930	
Project Name: Terwilliger - 2022 Phase III Asbestos Abatement - Bond - 5985 - FY22	250,000	-	250,000	
Project Name: Vernon - 2020 Asbestos Abatement-Bond - 5374 - FY20	74,708	74,708	-	
Project Name: Vernon - 2021 Asbestos Abatement-Bond - 5675	84,981	84,981	-	
Project Name: Vestal - 2020 Asbestos Abatement-Bond - 5367 - FY20	181,485	181,485	-	
Project Name: Winterhaven - 2021 Asbestos Abatement-Bond - 5676	160,383	160,383	-	
Project Name: Winterhaven - 2022 Asbestos Abatement - Bond - 5951 - FY22	569,965	-	569,965	

## 2017 Health &amp; Safety Funding Allocation

July 2022

	Total Funds	Spent To Date	Balance	Unalloc Balance
Project Name: Woodstock - 2020 Asbestos Abatement-Bond - 5368 - FY20	192,408	192,408	-	
Project Name: Woodstock - 2022 Asbestos Abatement - Bond - 5952 - FY22	409,200	-	409,200	
Project Name: Woodstock - Hallway-Abate and replace floor tiles - 4738 - FY18	8,614	8,614	-	
<b>Bond Fund Category: DS003 - Fire Sprinkler/Alarms</b>	<b>19,564,225</b>	<b>17,794,649</b>	<b>1,769,576</b>	<b>Fire Sprink/Alarm</b>
<i>Project Name: 2017 Bond Program</i>	<i>1,768,850</i>	<i>-</i>	<i>1,768,850</i>	<i>1,768,850</i>
Project Name: Chapman - Re-Roof - Bond Funded - 4671 - FY18	-	-	-	
Project Name: GROUP 2 - Fire Alarm / Sprinkler	4,048,504	4,048,504	-	
Project Name: GROUP 3 (IP 2017)	4,361,785	4,361,060	725	
Project Name: Jefferson - Fire Sprinkler Upgrades-Bond - 5053 - FY19	1,139,496	1,139,496	-	
Project Name: Multiple Sites - Fire Alarm Equipment Purchase - FY15/16/17/18 - X0114	46,523	46,523	-	
Project Name: Multiple Sites - Fire Alarm Upgrades-North Group 1 - 5211 - FY20	1,780,913	1,780,913	-	
Project Name: Multiple Sites - Fire Alarm Upgrades-North Group 2 - 5212 - FY20	1,844,959	1,844,959	-	
Project Name: Multiple Sites - Fire Alarm Upgrades-South Group 3 - 5213 - FY20	1,384,827	1,384,827	-	
Project Name: Multiple Sites - Fire Alarm Upgrades-South Group 4 - 5214 - FY20	1,703,198	1,703,198	-	
Project Name: Rigler - Health & Safety Improvements-Bond - 5029 - FY19	1,485,169	1,485,169	-	
<b>Bond Fund Category: DS004 - Lead Paint Stabilization</b>	<b>14,624,624</b>	<b>2,515,141</b>	<b>12,109,483</b>	<b>Lead Paint</b>
<i>Project Name: 2017 Bond Program</i>	<i>3,790,587</i>	<i>-</i>	<i>3,790,587</i>	<i>3,790,587</i>
Project Name: Multiple Sites - Lead Paint Abatement - BOND - 5466	4,000,000	1,469,195	2,530,805	
Project Name: Multiple Sites - Lead Paint Abatement - Emergency Declaration - 4284 - FY17	395,243	395,243	-	
Project Name: Multiple Sites - Lead Paint Abatement - Fund 423 - 4493 -FY17	438,795	438,795	-	
Project Name: Multiple Sites - Lead Painting-Bond-ASA - 5550	1,500,000	-	1,500,000	
Project Name: Multiple Sites - Lead Painting-Bond-First Cascade - 5552	1,500,000	200,400	1,299,600	
Project Name: Multiple Sites - Lead Painting-Bond-Fulcrum - 5551	1,500,000	-	1,500,000	
Project Name: Multiple Sites - Lead Painting-Bond-PaclndPaint - 5495 - FY21	1,500,000	11,509	1,488,491	
<b>Bond Fund Category: DS005 - Radon Mitigation</b>	<b>1,036,035</b>	<b>158,713</b>	<b>877,322</b>	<b>Radon</b>
<i>Project Name: 2017 Bond Program</i>	<i>877,322</i>	<i>-</i>	<i>877,322</i>	<i>877,322</i>
Project Name: Lent - Radon Mitigation - 4344 - FY17	38,938	38,938	-	
Project Name: Marysville - Radon Mitigation-Rms 137-138-139 - 4939 - FY20	8,901	8,901	-	
Project Name: Multiple Sites - Radon Mitigation - 4609 - FY18	110,875	110,875	-	
<b>Bond Fund Category: DS006 - Roof Improvements</b>	<b>52,986,434</b>	<b>52,410,702</b>	<b>3,853,511</b>	<b>Roof</b>
<i>Project Name: 2017 Bond Program</i>	<i>3,037,772</i>	<i>-</i>	<i>3,037,772</i>	<i>3,037,772</i>
Project Name: Chapman - Re-Roof - Bond Funded - 4671 - FY18	3,987,307	3,987,307	-	
Project Name: Duniway - Re-Roof-Bond Funded - 5420 - FY21	938,007	463,530	474,477	
Project Name: GROUP 3 (IP 2017)	10,648,856	10,521,969	126,887	
Project Name: Harrison Park - Partial Re-Roof-Bond - 5321 - FY20	2,680,274	2,680,274	-	
Project Name: Hayhurst - SRGP-Bond - 5028 - FY19	2,076,977	2,076,977	-	
Project Name: Jackson - Health & Safety Improvements-Bond - 5030 - FY19	3,982,062	3,969,165	12,897	
Project Name: Kelly - Partial Re-Roof-Bond - 5319 - FY20	1,649,098	1,649,098	-	
Project Name: Lee - Roof Repair - 4497 - FY18	96,750	96,750	-	
Project Name: MLC - Re-Roof-Bond Funded - 5422 - FY21	659,699	549,243	110,456	
Project Name: Mt Tabor - Partial Re-Roof-Bond - 5320 - FY20	3,022,689	3,022,689	-	
Project Name: Multiple Sites - 2018-2019 Middle School Conversions - 4586-FY18	3,781,759	3,781,759	-	

## 2017 Health &amp; Safety Funding Allocation

July 2022

	Total Funds	Spent To Date	Balance	Unalloc Balance
Project Name: Multiple Sites - Health & Safety Group 1 Design - 5153 - FY20	751,521	751,521	-	
Project Name: Multiple Sites - Health & Safety Group 2 Design - 5154 - FY20	1,146,401	1,146,401	-	
Project Name: Ockley Green - Partial Re-Roof-Bond - 5322 - FY20	1,871,486	1,871,486	-	
Project Name: Rieke - Re-Roof-Bond Funded - 5423 - FY21	367,693	278,671	89,022	
Project Name: Rigler - Health & Safety Improvements-Bond - 5029 - FY19	7,173,566	7,173,566	-	
Project Name: Sitton - Health & Safety Improvements-Bond - 5027 - FY19	3,468,883	6,744,662	2,000	
Project Name: Tubman - Roof Repairs- 4584 - OSM - FY18	-	-	-	
Project Name: Woodlawn - Partial Re-Roof-Bond - 5323 - FY20	1,645,634	1,645,634	-	
<b>Bond Fund Category: DS007 - Security Improvements</b>	<b>9,322,221</b>	<b>7,653,058</b>	<b>1,669,163</b>	<b>Security</b>
<i>Project Name: 2017 Bond Program</i>	<i>716,103</i>	<i>-</i>	<i>716,103</i>	<i>716,103</i>
Project Name: Benson HS Modernization - Kenton Swing Site-Mult Pathways - 5013	69,646	69,646	-	
Project Name: Creative Science - ADA Accommodation-Access Control - 5049 - FY20	12,855	12,855	-	
Project Name: Jefferson - Camera-Pull Stations - 4528 - FY17	30,859	30,859	-	
Project Name: Multi-2018-4675-Bond-Security-PKG1 FY18-19	2,512,541	1,966,284	546,257	
Project Name: Multi-2018-5025-Bond-Security-PKG2-FY19	2,419,821	2,051,239	368,582	
Project Name: Multi-2018-5026-Bond-Security-PKG3-FY19	3,256,981	3,256,981	-	
Project Name: Multiple Sites - 2018-2019 Middle School Conversions - 4586-FY18	303,414	265,194	38,220	
<b>Bond Fund Category: DS008 - Water</b>	<b>24,948,682</b>	<b>8,864,303</b>	<b>16,084,379</b>	<b>Water</b>
<i>Project Name: 2017 Bond Program</i>	<i>10,197,556</i>	<i>-</i>	<i>10,197,556</i>	<i>10,197,556</i>
Project Name: Multiple Sites - Drinking Fixture Replacement Program-Bid Package 31 - 5301 - FY20	349,125	277,770	71,355	
Project Name: Multiple Sites - Drinking Fixture Replacemnt Prog-Bid Package 32 - 5397 - FY20	342,136	220,344	121,792	
Project Name: Multiple Sites - Drinking Fixture Replacemnt Prog-Bid Package 33 - 5398 - FY20	283,173	273,218	9,955	
Project Name: Multiple Sites - Drinking Fixture Replacemnt Prog-Bid Pkg 34 - 5390 - FY21	354,142	322,269	31,873	
Project Name: Multiple Sites - Drinking Fixture Replacemnt Prog-Bid Pkg 35 - 5391 - FY21	355,960	346,367	9,593	
Project Name: Multiple Sites - Drinking Fixture Replacemnt Prog-Bid Pkg 36 - 5452 - FY21	393,074	307,818	85,255	
Project Name: Multiple Sites - Drinking Fixture Replacemnt Prog-Bid Pkg 37 - 5453 - FY21	377,963	337,885	40,078	
Project Name: Multiple Sites - Drinking Fixture Replacemnt Prog-Bid Pkg 38 - 5477 - FY21	384,456	316,865	67,591	
Project Name: Multiple Sites - Drinking Fixture Replacemnt Prog-Bid Pkg 39 - 5478 - FY21	326,040	309,196	16,844	
Project Name: Multiple Sites - Drinking Fixture Replacemnt Prog-Bid Pkg 40 - 5540 - FY21	326,040	296,696	29,344	
Project Name: Multiple Sites - Drinking Fixture Replacemnt Prog-Bid Pkg 41 - 5541	484,440	443,614	40,826	
Project Name: Multiple Sites - Drinking Fixture Replacemnt Prog-Bid Pkg 42 - 5542	464,072	373,337	90,735	
Project Name: Multiple Sites - Drinking Fixture Replacemnt Prog-Bid Pkg 43 - 5640	386,229	303,909	82,320	
Project Name: Multiple Sites - Drinking Fixture Replacemnt Prog-Bid Pkg 44 - 5641	324,442	271,592	52,850	
Project Name: Multiple Sites - Drinking Fixture Replacemnt Prog-Bid Pkg 45 - 5642	430,011	117,596	312,415	
Project Name: Multiple Sites - Drinking Fixture Replacemnt Prog-Bid Pkg 46 - 5741	383,900	100,416	283,484	
Project Name: Multiple Sites - Drinking Fixture Replacemnt Prog-Bid Pkg 47 - 5742	331,955	187,931	144,024	
Project Name: Multiple Sites - Drinking Fixture Replacemnt Prog-Bid Pkg 48 - 5743	409,860	372,973	36,887	
Project Name: Multiple Sites - Drinking Fixture Replacemnt Prog-Bid Pkg 49 - 5744	144,426	34,089	110,337	
Project Name: Multiple Sites - Drinking Fixture Replacemnt Prog-Bid Pkg 50 - 5866 - FY22	467,060	389,425	77,635	
Project Name: Multiple Sites - Lead in Water Repairs - 4517 - FY17	7,120,756	3,132,521	3,988,235	
Project Name: Multiple Sites - Lead in Water-Emergency Response - 4241 - FY16	311,867	128,472	183,395	

2017 Health & Safety Funding Allocation

July 2022

	Total Funds	Spent To Date	Balance	Unalloc Balance
<b>Bond Fund Category: Management Costs</b>	<b>12,000,000</b>	<b>11,112,462</b>	<b>887,538</b>	
<i>Project Name: 2017 Bond Program</i>	11,937,608	11,062,238	875,370	
Project Name: Multiple Sites - Day CPM Management Services - 4610 - FY18	-	-	-	
Project Name: Creative Science - SRGP Design - 5457 - FY21	34,852	22,684	12,168	
Project Name: Lent - SRGP Design - 5194 - FY20	27,540	27,540	-	
<b>Bond Fund Category: OSCIM</b>	<b>3,277,779</b>	<b>-</b>	<b>3,277,779</b>	<b>OSCIM</b>
<i>Project Name: 2017 Bond Program</i>	-	-	-	-
Project Name: Sitton - Health & Safety Improvements-Bond - 5027 - FY19	3,277,779	-	3,277,779	
<b>Bond Fund Category: H&amp;S Unallocated</b>	<b>-</b>	<b>-</b>	<b>-</b>	<b>H&amp;S Unallocated</b>
<i>Project Name: 2017 Bond Program</i>	-	-	-	-
	<b>158,000,000</b>	<b>115,117,352</b>	<b>46,160,427</b>	<b>23,074,371</b>

Bond Performance Audit Tracker  
 Status of Performance Audit Recommendations  
 July 2022 - BAC Report

2018: FHS/RHS Construction Audits Controls Recommendations				
Bond Year	#	Abbreviated Recommendation	Response	Status
2012	1	Require documented review and approval of all agreed upon self-performed work cost and pricing. Where insufficient competitive bidding is available for establishment of self-performed subcontract price: a) obtain independent cost analysis to support self-performed work pricing and negotiate a fair and reasonable price and/or b) price lump-sum work on a not-to-exceed cost reimbursable basis on future projects. Obtain self-performed work subcontracts to better establish self-performed work scope, pricing and payment terms. [FHS #12]	Completed	Complete
2012	2	Require visibility and reconciliation of project management systems and accounting systems of record utilized for project cost accounting and subcontractor payments. [FHS #13]	Concur with comment	Complete
2012	3a	Perform quarterly review of project change order files for application of expected cost analysis and related approval requirements. [FHS #14]	Concur with comment	Working
2012	3b	Add approval controls designed to prevent proceeding with work prior to full vetting of project design along with related budget. Verify architect progress against key milestones to help ensure timely and complete project work scope inclusion in plans. To prevent untimely and expensive owner-directed changes, require further approval controls for work scope modification. [FHS #14]	Completed	Complete
2012	4	To strengthen existing District controls over system information integrity and consistent with good payment application approval control practices, prior to each payment require eBuilder to include monthly secondary review of the reconciliation between District electronic records to Contractor cumulative payment application contract totals, commitments and costs incurred. [FHS #15, RHS #12]	Concur	Complete
2012	5	Require consistent and compliant application of contract rates to deduct change orders. [FHS #16]	Concur	Working
2012	6	On future projects, require contractors to identify and account for changes by contract line item and in compliance with contract requirements. Require maintenance of an allowance log that specifies budget as included under the GMP schedule of values, cost support for proposed uses of allowance amounts, approved allowance amounts used along with approval documentation by project allowance item. [FHS #17, RHS #13]	Concur	Complete
2012	7	Verify application of the contractual requirement for fixed fee calculation. [FHS #18]	Concur	Complete
2012	8	For future projects, add approval controls designed to prevent proceeding with work prior to full vetting of project design, along with related budget and to reduce owner-directed changes, where possible. [RHS #10]	Completed	Complete
2012	9	Implement construction program oversight controls to document verification of independent cost analysis performed on self-performed work procurements, when District competitive bidding procedures are not applied. [RHS #11]	Completed	Complete
2012	10	District project management personnel should require visibility, timely access and sign-off on work cost application applied by the Contractor. [RHS #14]	Concur with comment	Complete

<u>Audit Year</u>	<u>Summary of Recommendations</u>	<u>Percent Completed</u>
2018	11 Recommendations, 9 completed	82% Completed

Status Notes on Recommendations Not Completed

2018	3a	OSM is developing a Standard Operating Procedure for internal audits of change order files.
2018	5	This audit observation noted change order mark-ups had not been applied consistently to deductive changes. OSM is reviewing the Standard Operating Procedure for change requests to ensure that this issue is addressed as part of project staff review of change orders.

Bond Performance Audit Tracker  
 Status of Performance Audit Recommendations  
 July 2022 - BAC Report

2019 Phase 2 Bond Performance Audit Recommendations				
Bond Year	#	Abbreviated Recommendation	Response	Status
2017	1	Develop a written plan for establishing and prioritizing corrective actions needed to address project delivery issues related to change orders, contractor invoices, and other recommendation noted in prior audits of 2012 Bond projects.	Concur	Complete
2017	2	Develop a written plan or strategy for identifying and incorporating additional funding options if future bond funds are not available and regularly communicate and discuss progress with the Board and Bond Accountability Committee	Complete	Complete
2017	3	Ensure cost estimates are fully documented with underlying support and rationale used for soft costs and FF&E - in addition to other cost components - including variations or deviations from stated methodology.	Concur	Complete
2017	4	Implement the new cash flow planning process as intended at the start of the Fiscal Year 2019-2020, and update cash flows regularly.	Concur w/ comment	Complete
2017	5	Immediately allocate and concentrate efforts on completing the overdue Fiscal Year 2018-2019 reconciliations between e-Builder construction management system and the PeopleSoft financial system, as well as ensure future reconciliations are regularly performed in a timely manner	Concur	Complete
2017	6	Update and re-issue the PMP, in addition to individual school PTMPs, as well as consider developing quick tools, guides, and checklists to help project teams implement the protocols identified in the PMP and PTMPs.	Concur	Complete
2017	7	Formally communicate, clarify and train OSM project teams and individuals involved with project delivery on existing document management protocols including requirements and expectations for usage.	Concur	Working
2017	8	Standardize design deviation logs by identifying consistent information to be maintained for each project and ensure approvals are documented	Concur w/ comment	Complete
2017	9	Establish a tracking mechanism to store proposed changes to Ed Specs and Design Standards in an accessible location	Concur w/ comment	Working
2017	10	Supplement the "Decision Making Hierarchy" process with written guidance on what decisions to bring forward and elevate beyond the project team as well as train project teams on standard practice for value engineering deviations - as well as Ed Spec and Design Standard deviations	Concur w/ comment	Working
2017	11	Better document lessons learned by: categorizing lessons learned log items into separate subcategory section allowing project managers to more easily identify relevant items; and summarizing lessons learned and regularly distribute or discuss items with project teams.	Concur	Complete

<u>Audit Year</u>	<u>Summary of Recommendations</u>	<u>Percent Completed</u>
2019 Ph 2	11 Recommendations, 8 completed	73% Completed

Recommendations Marked as Complete Since Last Reporting

2019 Ph 2	3	OSM has implemented a project set-up process in eBuilder that requires completion and attachment of a cost estimate with all estimating rationale in order to create new projects. All budget change requests from project managers now require completion of the same cost estimating spreadsheet, which is attached to the budget change process in eBuilder.
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Status Notes on Recommendations Not Completed

2019 Ph 2	7	OSM has ordered and distributed PPS computer equipment for all non-PPS staff and requires that all PPS-related work be performed on PPS equipment utilizing PPS document management systems. A working group of staff and program management was convened to develop revised file naming and document management systems. A new file naming convention has been implemented. Folder structure revisions are under discussion.
2019 Ph 2	9	Education Specifications are updated on a scheduled basis, with significant, organized stakeholder input, and approved via the BOE. Proposed changes to the Design Guidelines are distributed to all affected parties, including OSM staff, for discussion prior to adoption.
2019 Ph 2	10	OSM is developing decision examples and working with project staff to identify inconsistencies or questions that will need to be addressed by the guidance.

Bond Performance Audit Tracker  
 Status of Performance Audit Recommendations  
 July 2022 - BAC Report

2020 Bond Performance Audit Recommendations				
Bond Year	#	Abbreviated Recommendation	Response	Status
2017	1	Provide the Board an analysis discussing implications if voters do not approve the November 2020 Bond on the Benson High School Project, in particular, as well as other 2017 Bond projects, as appropriate. At the minimum, this analysis should provide cash flow projections for the Benson High School project, and deliberate on the effects of a full faith and credit loan option to ensure the Board can make informed decisions going forward.	Nonconcur	Complete
2017	2	Implement plans to ensure project team members have needed access to e-Builder and that key non-PPS employees in critical project roles have computers to access project information.	Completed	Complete
2017	3	Revisit systems and tools used on a go-forward basis for capturing H&S project expenditure and status data to be able to more efficiently generate reliable data to address H&S project status reporting needs to oversight bodies and the public.	Concur with Comment	Complete
2017	4	Complete the development of the interactive map tool and ensure the map is supplemented with summary information about the H&S program. At the minimum, the public information should provide common data from each H&S category in a standardized format that provides easy tracking of current budget, schedule, status, and delivery plans in relation to initial Bond plans.	Concur	Complete
2017	5	Require and maintain more consistent documentation associated with the review of price proposals or quotes from construction contractors related to change orders through means such as incorporating project team notes, uploading negotiations in email correspondence, or marked-up price proposals, into the e-Builder system to provide evidence of OSM's due diligence in reviewing contractor change order prices.	Concur	Working
2017	6	Prohibit contractors to perform any work for the district until a fully executed contract is in place or a formal written authorization is provided to allow for pre-contract execution work to start.	Concur with Comment	Complete
2017	7	Conduct a post-project completion analysis for the Madison and Lincoln High School projects to evaluate benefits and challenges of the CM/GC delivery method overall, as well as specific aspects such as timing of Guarantee Maximum Price (GMP) contract amendments, and make process changes as warranted. The evaluation should consider components suggested by ORS279.103 and provide a comparison of actual project cost against original project estimates, change order number, value and type, as well as descriptions of success and failures during design and construction.	Concur with Comment	Working
2017	8	Memorialize and discuss underlying rationale and decisions related to the timing of GMP negotiations with the Bond Accountability Committee, and present to the Board for future CM/GC GMP contract amendments as appropriate.	Concur with Comment	Working
2017	9	Clarify and incorporate language in CM/GC contracts, as appropriate, related to contractor financial records in accordance with generally accepted accounting principles.	Concur	Complete
2017	10	Address inconsistencies between the contract for architect/engineer services and the CM/GC contract for construction services related to the timing of reconciled cost estimates for future projects by ensuring that the same deliverable milestones are included in both contracts.	Concur	Working
2017	11	Evaluate payment terms and conditions for all H&S low-bid lump-sum contracts to ensure consistency between procurement documents, contract language, and actual payment process practices.	Concur	Working

<u>Audit Year</u>	<u>Summary of Recommendations</u>	<u>Percent Completed</u>
2020	11 Recommendations, 6 completed	55% Completed

Recommendations Marked as **Complete** Since Last Reporting

2020	6	Contract language already required that the contract be fully executed prior to commencing work. PPS Public Contracting Rules also prohibit contract work from commencing without a fully executed contract (with some limited exceptions). Existing Standard Operating Procedures note the requirement, and these existing SOPs have been made part of the annual online training courses for OSM project managers.
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Bond Performance Audit Tracker  
Status of Performance Audit Recommendations  
July 2022 - BAC Report

Status Notes on Recommendations Not Completed

2020	5	Through additional training, staff has improved their attachment of change order review materials to provide documentation of their change order analysis and recommendations. OSM is working on incorporating explicit language into OSM's Standard Operating Procedure (SOP) for Change Orders.
2020	7	Post-project analysis of the Madison and Lincoln High School CM/GC contracts is already required by Portland Public Schools Public Contracting Rules for contracts procured through an alternative delivery method, following the requirements of ORS 279C. However, this analysis cannot be completed until after the later of the date of final payment or the date of final completion. As such, this recommendation will not be able to be resolved until 2022 at the earliest for the Madison project and 2024 at the earliest for the Lincoln project.
2020	8	This recommendation is under review by the AIT. GMP timing has already been set for all of the current 2017 Bond CM/GC projects, so this recommendation will not be able to be resolved until a new CM/GC project is undertaken.
2020	10	Staff are working on proposed updates to the A/E contract template and will incorporate this with the proposed updates.
2020	11	Staff are reviewing H&S contract templates to determine if additional templates are needed to accommodate all industry-standard payment practices.

Bond Performance Audit Tracker  
 Status of Performance Audit Recommendations  
 July 2022 - BAC Report

2021 Bond Performance Audit Recommendations				
Bond Year	#	Abbreviated Recommendation	Response	Status
2017	1	The PPS Board should revisit its Equity in Public Purchasing and Contracting ("EPPC") Policy to clarify and define the District's vision, goals, and commitment to business equity. This should include reassessing the overall intent, determining how equity is characterized, and expanding on what attainment of business equity goals for the District should entail.	Concur with Comment	Working
2017	2	Further develop the Board's overarching vision into more succinct measurable subgoals or objectives, support new goal setting defensible data, and define qualitative and quantitative metrics to measure against new goals.	Concur	Working
2017	3	Conduct a cost-benefit analysis of available business equity strategies, such as those outlined in this report, and include considerations such as long-term versus short-term strategies, direct versus intangible "investment" type strategies, and unintended consequences.	Concur	Working
2017	4	Develop tools and protocols to capture outcomes of chosen equity strategies, and validate outcome data accuracy.	Concur with Comment	Working
2017	5	Create protocols to expand on existing business equity annual reporting to include an assessment of whether annual equity outcomes realized meet the intent of the EPPC Policy and goals of the Administrative Directive, or if modification to the portfolio of equity strategies is warranted, and based on results, adjust strategies as necessary.	Concur	Working
2017	6	Develop and formalize operating procedures to define the roles, responsibilities and expectations of PPS staff specific to managing contractor and consultant business equity compliance, reporting on outcomes, and coordinating efforts to bolster PPS' presence and visibility in the certified business community.	Concur	Working
2017	7	Provide context and explanation of nuances and limitations of B2GNow data in presentations and reports to the Board and the Bond Accountability Committee.	Concur	Complete
2017	8	Develop a PPS-led training to provide new and existing contractors and consultants guidance on equity reporting requirements and expectations; and provide refreshers on training materials on an established schedule over the course of the contract duration.	Concur with Comment	Working
2017	9	Conduct a review to explore system capabilities, functions, and reports with the B2GNow vendor that could enhance PPS' management of business equity efforts.	Concur	Working
2017	10	Develop new and strengthen existing protocols for capturing institutional knowledge currently held by one OSM staff member to ensure information and processes about Bond Communication efforts is retained with PPS. Protocols could include establishing key policies and procedures, cross-training staff on communication activities and knowledge, creating a resource library, and providing data sources, timestamps, "as of" dates, and follow-up contact information, as appropriate.	Concur	Complete

<u>Audit Year</u>	<u>Summary of Recommendations</u>	<u>Percent Completed</u>
2021	10 Recommendations, 2 completed	20% Completed

Recommendations Marked as **Complete** Since Last Reporting

2021	10	Key policies and procedures have been created, and are part of a new shared resource library available to all OSM staff. A second staff has been cross-trained on communication activities and knowledge. All public-facing materials are reviewed for data sources, timestamps, "as of" dates, and follow-up contact information as appropriate, prior to being released.
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Bond Performance Audit Tracker  
Status of Performance Audit Recommendations  
July 2022 - BAC Report

Status Notes on Recommendations Not Completed

- |      |   |  |
|------|---|--|
| 2021 | 1 | <p>This recommendation is under review by the AIT. PPS staff appreciate the opportunity for updated guidance from the PPS Board on their goals for business equity. Staff have shared this recommendation with the PPS Board, however policy updates are scheduled by the Board and are therefore subject to the Board's timeline.</p> <p>As an initial step, staff have begun working on new focus areas in reporting, in addition to total amount paid to Certified Businesses. These new focus areas include: number of firms and number of unique Certified Businesses utilized at prime and sub level; number of Certified Businesses that access bid documents, number that bid, and percent awarded; and percentage of total prime contract awards going to Certified Businesses. A new Certified Business Program Manager has recently been hired by OSM to help with implementation efforts of this recommendation.</p> |
| 2021 | 2 |  |
| 2021 | 3 | <p>This recommendation is under review by the AIT. It is anticipated this will be developed as part of an annual business equity review and reporting cycle. Staff are working on developing the components, scope and schedule of this new annual review. A new Certified Business Program Manager has recently been hired by OSM to help with implementation efforts of this recommendation.</p>   |
| 2021 | 4 | <p>This recommendation is under review by the AIT. As noted in the Draft Report, it can be difficult to find a direct correlation between "how a particular strategy employed results in increased or decreased utilization rates." Staff will look to develop tools to capture outcomes, with the understanding that not all outcomes may be able to be directly attributed to chosen equity strategies. A new Certified Business Program Manager has recently been hired by OSM to help with implementation efforts of this recommendation.</p>  |
| 2021 | 5 | <p>This recommendation is under review by the AIT. Staff agrees that an annual review of business equity strategies, and plan of changed or new strategies for the upcoming year, would allow for a more structured framework in which to identify potential changes or new strategies, develop cost-benefit analyses, and collect and analyze outcome data. Staff are working on developing the components, scope and schedule of this new annual review. A new Certified Business Program Manager has recently been hired by OSM to help with implementation efforts of this recommendation.</p>   |
| 2021 | 6 | <p>Staff have begun to develop a document that outlines specific staff roles with respect to the business equity program. A new Certified Business Program Manager has recently been hired by OSM to help with implementation efforts of this recommendation.</p>  |
| 2021 | 8 | <p>Staff concur with this recommendation but have not been able to implement previously due to lack of staff resources. A new Certified Business Program Manager has recently been hired by OSM to help with implementation efforts of this recommendation. Staff have begun collecting all prior written training materials to assess additional needs.</p>   |
| 2021 | 9 | <p>Staff have begun working with B2GNow vendor to explore new reporting focus areas, as noted in status note of recommendation 2 above. PPS' needs in this area will depend on potential changes to business equity policies, goals or subgoals, or administrative directives, as identified in recommendations 1 and 2 above. A new Certified Business Program Manager has recently been hired by OSM to help with implementation efforts of this recommendation.</p>   |

# **Report to The Portland Public Schools Board of Directors**

Date: September 16, 2022

From: Bond Accountability Committee

Subject: BAC Report #37

## **Committee Charge**

The Portland Public Schools Board of Education (Board) has appointed a citizen Bond Accountability Committee (“Committee”) whose charge is to monitor the planning and progress of the bond programs relative to voter-approved work scope, schedule and budget objectives. The duties of the Committee are (i) to receive reports on the current status and planned implementation of the bond program; (ii) to determine whether such status and implementation are consistent with the program approved by the voters; and (iii) to report their findings to the Board.

The current members of the BAC are:

Greg DiLoreto  
Norman Dowty  
Darren Golden  
Angela Jarvis Holland  
Kenechi Onyeagusi  
Tom Peterson, Co Chair  
Cara Turano, Co Chair  
Karen Weylandt

## **Background;**

In November 2012, voters approved a \$482M capital improvement bond for Portland Public Schools.

In May 2017, voters approved a \$790M capital improvement bond measure.

In November 2020, voters approved a \$1.206B capital improvement bond measure.

All regular BAC meetings are publicly noticed and open to the public. Staff presentation materials and meeting minutes, along with BAC reports are regularly posted on the district website. Meetings are also video recorded, that allows BAC members unable to attend scheduled meetings to watch the proceedings and review the materials at their convenience.

The BAC meeting on August 11, 2022 was held at Roosevelt High School. Four members participated, Greg DiLoreto, Norm Dowty, Tom Peterson, and Cara Turano. The video of the

meeting was made available to the other members. In addition to the bond program administration update, the meeting primarily focused on the 2020 Curriculum Projects, and 2020 Technology Projects.

## **Report**

*1. Whether the school district bond revenues are **expended only for the purposes for which the bonds were approved**, and that bond revenues are not used for any purpose prohibited by law;*

- The BAC reviewed The Program Management Cost Report and additional reports specific to bond revenues and expenditures.
- Based on the information provided, it appears that the school district is spending revenues only for the purposes for which the bonds are approved.

*2. Whether the **bond budget** is sufficient to complete the scope of work as outlined in the voter-approved bonds;*

- The BAC reviewed The Project Management Cost Report, 2020 Bond Information Technology, and Curriculum Bond programs revenues, expenditures, and budget forecasts during this period.
- Based on the information provided, it appears that the 2012 Bond program will have sufficient funding to complete all the scope of work. Current projected costs for the 2012 bond program are \$439,228 under budget.
- Based on the information provided, it appears that 2017 Bond programs will have sufficient funding to complete all the scope of work except Benson, which is also funded in the 2020 budget.
- Based on the information provided, it appears that 2020 Bond programs will have sufficient funding to complete all the scope of work identified to date.
- Specific to the 2020 Curriculum and Technology Budgets, due to the unique nature of these programs not all work is compensable under the 2020 Bond Program, so the budgets reflect funding from the Bond and funding from other sources. Based on the information presented the Curriculum program and Technology programs have sufficient funding for the identified scope, although supply chain and cost escalation trends continue to be a concern.

*3. Whether the projects planned, in progress, and completed will meet the **scope of work specified in the voter-approved bonds**; and*

- The BAC reviewed the 2020 Bond Information Technology and Curriculum programs reports during this period.
- Based on the information provided by staff, it appears that the school district is proceeding with work that meets the intent of the scope of work specified in the voter-approved bonds. Not all of the proposed scope is compensable under the Bond

program so in some cases the scope has been modified to maximize utilization of the Bond budget. The ERP Replacement program work scope was reduced as most of the planning phase for this program was not compensable. The ERP budget was reduced and budget for other technology programs were increased, which in turn allows for additional work scope to increase for those programs. Project teams also continue to mitigate potential scope implications due to current cost escalation issues.

4. *Whether the projects are being delivered on **schedule** relative to the voter-approved bonds;*

- The BAC reviewed the 2020 Bond Information Technology and Curriculum programs reports during this period.
- Based on the information provided by staff, it appears the school district is working to meet the schedule approved and expected relative to the voter-approved bonds. Although supply chain and cost escalation issues could have schedule implications going forward.
- In general, the Technology projects are being implemented on schedule. Roll out of the device replacement was impressive with 51,968 devices deployed across the district.
- Implementations of the Curriculum program is on schedule, with an impressive eight curriculum programs implemented to date. The curriculum adoption process is on track to comply with Oregon Department of Education Division 22 Standards.

5. *The Committee will receive and review copies of **annual performance audit reports and financial audit reports** to ensure Bond revenues are expended in compliance with state law and the ballot measure language.*

- No audit information was reviewed at this meeting.

*Additionally, the Committee may provide feedback and/or advice to the Board on one or more of the following topics:*

- *Alignment with the goals and principles of the Long Range Facilities Plan;*
- *Alignment with the goals of the Business Equity Policy;*
- *District standards and innovative practices for achieving lower maintenance and construction costs while improving operating efficiency, sustainability, and increasing building longevity;*
- *Historic preservation and school renovation opportunities compatible with the architecture of surrounding Portland neighborhoods;*
- *Potential capital partnerships for joint and shared use of PPS facilities;*
- *Implementation of appropriate ways to address seismic issues;*
- *Topics and scope for the annual performance audit work plan;*
- *Compliance with ADA; and*
- *Communicating key information related to the bonds to the School Board, public groups, organizations and stakeholders.*

- Business Equity performance was presented for capital improvement programs. The metric is based on actual spending against the district's goal of 18%. There was a slight improvement from the last report for the cumulative results, however the last twelve months is tracking at 20% and increased 1% from the previous report. There are no business equity goals for the Curriculum and Technology programs.
- Workforce Equity performance was presented for capital improvement programs. Overall workforce equity performance continues to track above the 25% goal at 29%, however female participation remains at 5%. There are no workforce equity goals for the Curriculum and Technology programs.

### *General Comments,*

In the interest of improving the effectiveness of the BAC and our ability to meet the intent of our charter we have offered a number of recommendations to OSM staff that include:

- Consider establishment of Social Equity and Workforce goals for the Technology programs. BAC recognizes that implementation of these programs is different than construction, and the goals and tracking of performance will be different, but social equity and workforce equity still apply to this industry.
- Recruitment of new BAC members to fill the two vacancies.

In conclusion, we commend the district with what they have accomplished while dealing with the unprecedented challenges within the current economy. In particular the BAC was impressed with what has been accomplished within the Curriculum and Technology programs to date. We continue to appreciate the quality and professionalism of OSM staff, design teams and contractors as they take on multiple issues and ongoing efforts to explore new approaches. We thank the Board for this opportunity to serve and play a small part in your bond programs.

### **Related Documents**

- BAC Charter
- BAC Work Plan
- [https://docs.google.com/document/d/1XwJWHPz7v\\_OTASh5Dms117A8TCzCnrjz\\_MCY\\_KOaj2d8/edit?usp=sharing](https://docs.google.com/document/d/1XwJWHPz7v_OTASh5Dms117A8TCzCnrjz_MCY_KOaj2d8/edit?usp=sharing)
- Bond Language
  - 2012
  - 2017
  - 2020
- OSM documents
  - August 11, BAC Materials, [https://drive.google.com/drive/folders/1Y7DedCEKQpVy6\\_wSI2jITi8vLUlebvX5](https://drive.google.com/drive/folders/1Y7DedCEKQpVy6_wSI2jITi8vLUlebvX5)



## MEMO

**Date:** September 19, 2022

**To:** Facilities & Operations Committee

**From:** Aaron Presberg, Senior Manager, Energy & Sustainability  
Dan Jung, Chief Operating Officer

**Subject:** Climate Crisis Response, Climate Justice and Sustainable Practices Policy Implementation Plan and Construction Modernization

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### **Background**

In 2017 and 2020 Portland voters passed general obligation bond measures that include modernization of Benson Polytechnic High School, Jefferson High School, Lincoln High School, McDaniel High School, Multiple Pathways to Graduation High School and Kellogg Middle School. Building design of Cleveland High School and Ida B Wells High School is also included in the 2020 bond in anticipation of future construction.

In March 2022 the Board of Education adopted the [PPS Climate Crisis Response, Climate Justice, and Sustainable Practices Policy](#). The policy is a response to the climate crisis currently underway and includes district-wide climate goals specific to nutrition service operations, facilities, student curriculum, student engagement, staff professional development, transportation, financial investments and more. Achieving these goals requires a thoughtful plan and approach that brings together internal and external stakeholders, prioritizes investments that achieve the greatest outcomes and moves the district in one unified direction. PPS' Climate Justice Advisor - with support from stakeholders and the district's Climate Crisis Response Committee - is in the process of developing this comprehensive CCRP implementation plan and will be leading regular goal monitoring and reporting efforts.

### **Projects in Construction**

Some of the policy goals focus on greenhouse gas (GHS) emission reductions with targeted milestones of reducing carbon emissions by 50 percent of the 2018-2019 baseline by 2030 and achieving carbon neutrality by 2040. Meeting these goals will require major capital improvements that must include careful planning, detailed engineering and supporting upfront costs.

When the CCRP was adopted, several modernization projects were in various phases of completion with four of the projects already having their master plans<sup>1</sup> approved, building designs completed and building permits issued; McDaniel and Kellogg were active schools and Benson and Lincoln were in construction. And although Lincoln and Benson were designed prior to the CCRP, and include some fossil fuel equipment, they both have many energy efficiency and sustainable features (including large solar arrays and LEED certification). The remaining schools (Cleveland, Jefferson, MPG, and Wells) have or will be designed to comply with the CCRP goals, including design for all electric infrastructure.<sup>2</sup>

### **History of All-Electric Buildings at Portland Public Schools**

Prior to the official adoption of the climate policy, the district did design and construct an all-electric building: Kellogg. All bond modernizations and rebuilds go through the cost-benefit analysis of designing and constructing an all-electric building and it has rarely been cost-effective to move forward with an all-electric design. Kellogg's cost-benefit analysis during early design found that, in addition to providing GHG emissions reductions, it would be cost efficient to design and construct Kellogg as all-electric. This was due to a number of factors, including Kellogg being new construction on a site with no existing infrastructure. For example, not only did the Kellogg design team not have to work around existing utility mains and infrastructure, the use of all-electric allowed them to save on construction costs by not providing a new gas pipeline and other NW Natural infrastructure. Although the PPS standards in place at that time did not require all-electric, it was more cost-efficient for Kellogg than including utilization of some natural-gas infrastructure. The cost-benefit analysis for the Benson, designed under the same PPS standards, found that going to all-electric would mean a substantial cost increase for the project that would put it over budget. Since the standards did not require all-electric and the budget had not included all-electric in its assumptions, PPS kept Benson's design per the standards. The same was true for the Lincoln and the McDaniel modernizations.

### **Impact to Changing Course on Benson**

The impact of changing Benson's design to be entirely fossil fuel free would cause a delay in the project completion and would significantly increase the project budget. The engineering design of new heating and cooling equipment and required distribution systems would take 6-8 months and involve redesign from the entire design team and the subconsultants to accommodate potential impacts. This includes Mechanical, Electrical, Plumbing, and Structural changes in addition to adjustments for interior components. Additionally, our electric service provider would need to bring an entirely new service onto the property. Once the design is completed, we would need to apply for permit revisions, which we anticipate would take a minimum of an additional 3-4 months and may trigger further review from the Historic Landmarks Commission. Only after

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<sup>1</sup> Master Plans for all modernization are approved by the Board and include the project scope, schedule and budget.

<sup>2</sup> There are instances where CCRP goals may not be feasible to the full extent. One example: we have yet to find a suitable replacement for gas powered bunsen burners.

this time would we have the ability to order the approved products, which have lead times currently of 10-12 months; effectively delaying the project almost 2-years and requiring the Benson student body to remain at the Marshall campus for 5 school years.

The consideration for cost impact to the project would include engineering design, permitting, purchase of new equipment, and installation of newly designed components. The current equipment has already been purchased and is in process of being delivered to the jobsite. The costs for the new system would be in addition to those costs and the Benson project team estimates it would have a rough order of magnitude of \$6-8 Million in total added cost.

The following equipment at Benson is currently designed to run on natural gas:

1. Five (5) high-efficiency boilers
2. Domestic hot water heaters
3. Kitchen equipment
4. Science labs

The Benson Modernization has the following design features that are in compliance with the climate policy:

1. On-site renewable energy: solar array with 335 kW capacity, which would be one of the largest systems in the district.
2. Energy Use Intensity (EUI): estimated to be 45 kBtu/square foot/year (10 lower than the district baseline average EUI of 55 kBtu/square foot/year)
3. Energy efficient HVAC system: high efficiency condensing boilers (for heating) and water cooled chillers (for air conditioning), energy/heat recovery on the ventilation system.
4. Robust building envelope: wall/roof insulation, double-pane windows.
5. Advanced energy metering: to monitor and manage energy use more closely.
6. Ceiling fans: strategic use of high-volume, low-velocity fans to supplement thermal comfort and to reduce energy load from the HVAC system.
7. Daylighting: expanded daylighting access for regularly occupied spaces to provide natural light and help reduce energy load from lighting.
8. LEED Certification: designed to achieve at least LEED Silver, on track for LEED Gold.
9. Multiple Pathways to Graduation: this building, on the Benson campus, is designed to be all-electric with the bunsen burners being the one exception.

## **Policy Goals**

In addition to the overarching climate policy goal to achieve net zero GHG emissions by 2040, the policy outlines two specific goals related to phasing out fossil fuel infrastructure: *prohibit the installation of fossil fuel infrastructure (gas-fired equipment) in all new buildings and phase out fossil fuel infrastructure (gas-fired equipment) in all existing buildings by 2050.*

Even though the district has recently designed or constructed newer buildings with natural gas infrastructure, PPS is still on track to meet the climate policy goals. For example, Franklin, Roosevelt, Faubion, Benson, McDaniel, and Lincoln were designed before the policy was developed, but they still help us move closer to the goals by increasing energy efficiency and installing solar to increase our renewable energy generation; both of which lower our GHG emissions. Going forward with the Jefferson Modernization and subsequent projects, the district will ensure that building electrification will be a top priority and that fossil fuel infrastructure will effectively be phased out. The district will continue to pursue state and federal incentives as well as emerging technological advancements to ensure this transition is economically efficient and reduces additional expenses to the Portland community.

cc: Marina Cresswell, Senior Director, Office of School Modernization

Armand Milazzo, Director of Construction, Office of School Modernization

Patrick LeBoeuf, Director of Projects and Construction, FAM

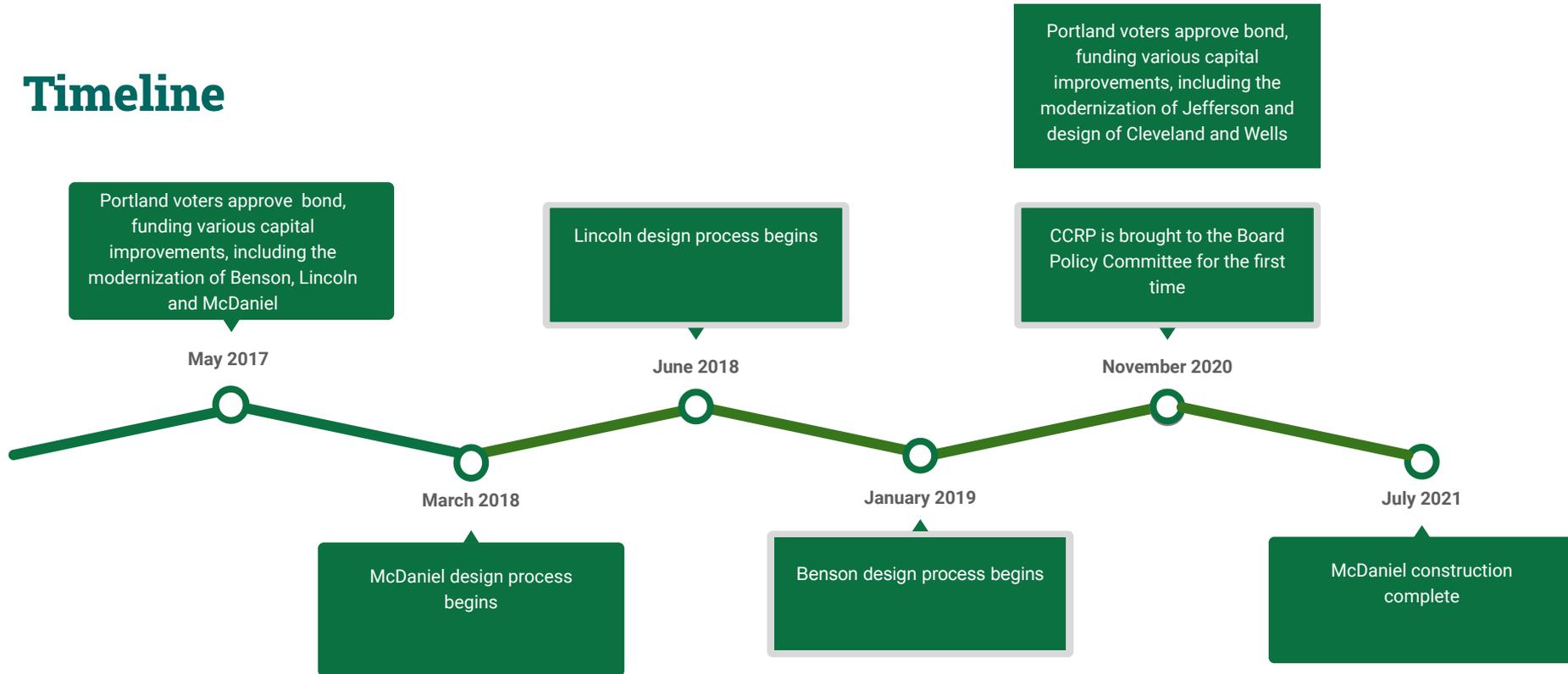
Kat Davis, Advisor for Climate Justice, Chief of Staff

# Climate Crisis Response Policy

## Implementation Overview

September 22, 2022

# Timeline



# Timeline (cont.)

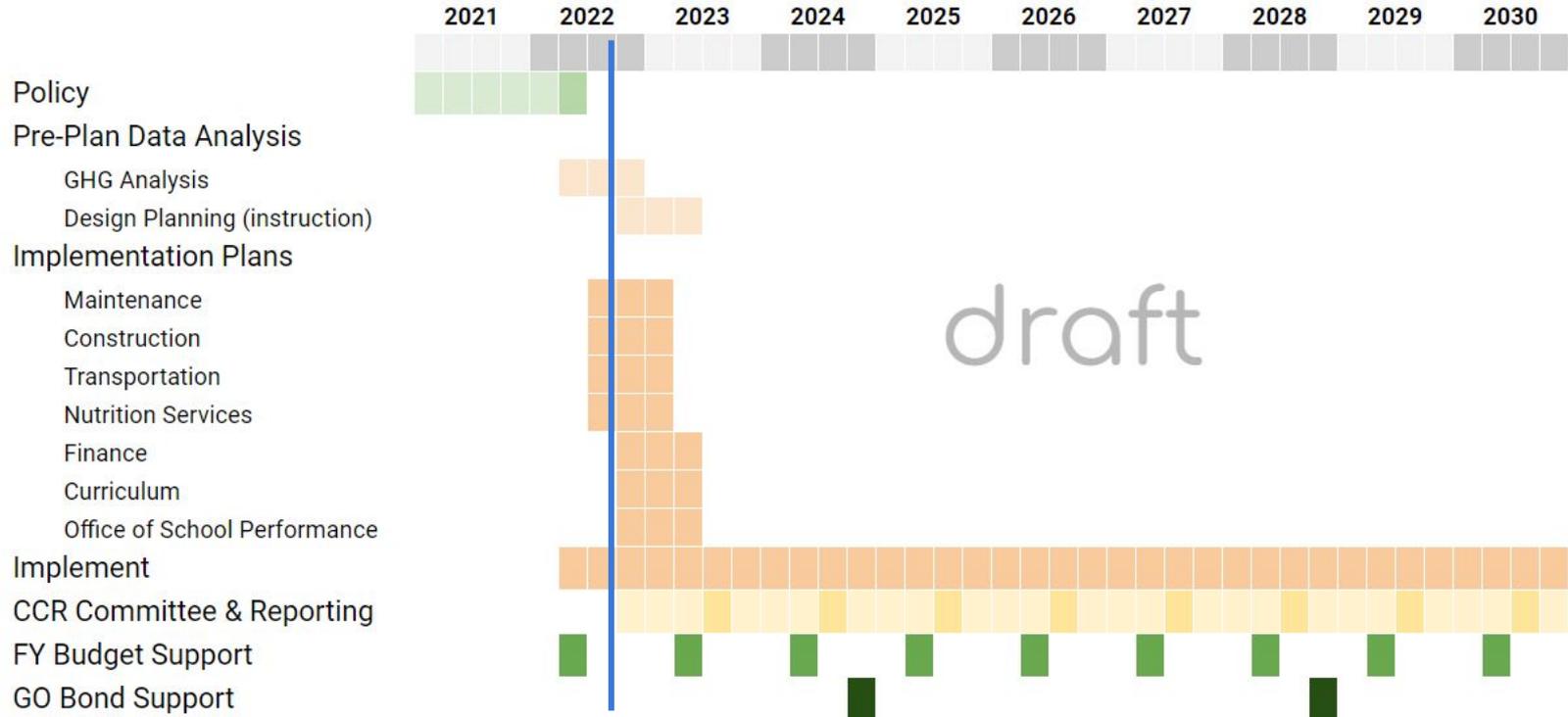


# CCRP Implementation

First year District Goals - Create an implementation plan for each department connected to the policy goals including:

- Current Inventory
  - Establish a baseline of metrics from which to measure progress
  - Track current equipment and systems in use
- Definitions of success
  - Establish a tangible and measurable set of policy objective outcomes
- Set milestones
  - Develop a milestone map and progress tracking system
  - Annual progress report to Board

# CCRP Implementation Schedule



# What is Already in Process?

**Greenhouse gas  
inventory**

**4 electric buses  
purchased**

**Construction  
implementation plan**

**2020 bond:  
all-electric HVAC**

**CCR Committee  
appointed &  
launched**

**Jefferson,  
Cleveland, Wells  
Modernizations to  
align with policy**

# OSM Projects Overview

	<u>All-Electric</u>	<u>Solar Array</u>	<u>Energy Efficient HVAC</u>	<u>Daylighting</u>	<u>High Performance Envelope</u>	<u>Advanced Energy Metering</u>	<u>On-Site Stormwater Processing</u>	<u>LEED Certification</u>
<b><u>2017</u></b>								
Kellogg MS Rebuild	X	X	X	X	X	X	X	X
McDaniel HS Modernization		X	X	X	X	X	X	X
Lincoln HS Modernization		X	X	X	X	X	X	X
Benson HS Modernization		X	X	X	X	X	X	X
MPG Building New Construction	X*	**	X	X	X	X	X	X
<b><u>2020</u></b>								
Bridger Mechanical	X		X					
Kelly Mechanical	X		X					
Lent Mechanical	X		X					
Harrison Park Mechanical	X		X					
Jefferson HS Modernization	X	X	X	X	X	X	X	X
Ida B Wells HS Modernization	X	X	X	X	X	X	X	X
Cleveland HS Modernization	X	X	X	X	X	X	X	X

\* MPG is all-electric except for gas Bunsen burners    \*\* MPG's solar array was added to Benson's solar array for efficiency