

Facilities and Operations Committee  
Meeting  
Thursday, March 9, 2023 4:00 PM

Dr. Matthew Prophet Education Center -  
Mazama Conference Room (floor 2)  
501 N. Dixon St.  
Portland, OR 97227

## **Agenda**

- I. 4:00 pm - Supplement Transportation Plan (Committee Recommendation)
- II. 4:20 pm - Tubman Relocation Update: Community Engagement Focus
- III. 4:40 - Office of School Modernization and Bond Accountability Committee Update (written update, no presentation but opportunity for Committee questions)
- IV. 4:50 pm - Public Comment Comment will be provided during the related agenda topic.
  - The topic must be related to an item on the agenda.
  - To sign up for public comment email [PublicComment@pps.net](mailto:PublicComment@pps.net) or call 503-916-3741.
- V. 5:00 pm - Adjourn

# Supplemental Transportation Plan

Phase 1: SE Portland Enrollment Balancing  
Schools





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## What is the Supplemental Transportation Plan?

Transportation Services are mandated by ORS (327.043) for students living beyond a prescribed distance. Expenses from this transportation are reimbursable from the state school fund. Sometimes there are hazards inside the prescribed walk boundary that make walking to school unsafe, the Supplemental Plan identifies these hazardous areas.

A Supplemental Transportation Plan (STP) is required by the same ORS and is the mechanism we use to obtain reimbursement for our transportation services within the mandated distance boundary. The report goes to the Oregon Education Department and there is no prescribed timeline to submit updates, however to keep reimbursement aligned with use, we need to update the plan.

The STP defines hazard zones within 1 mile walk boundaries of elementary schools and 1.5 miles of middle schools. Students within a hazards zone are entitled to supplemental transportation (bus service). The State Reimburses 70% of the approved cost for supplemental transportation - our last update was filed with ODE in the 1990's. In the current STP, safety is in the context of high speed / high crash streets, presence of sidewalks, etc. and it does not account for socio-economic factors such as high crime areas. We are working to remedy this with the Supplemental Transportation Plan Update (STPU).

## Scope: a Phased Approach

The new supplemental plan will be implemented using a three phase approach to be completed in 2025. All changes will be implemented at the beginning of the associated school year. The three phases are as follows:

- Phase I: SE Portland Enrollment Balancing Schools - 2023
- Phase II: McDaniel, Grant, Jefferson and Roosevelt clusters - 2024
- Phase III: Westside and Inner SE Schools- 2025

## Phase I: SE Portland Enrollment Balancing Schools

To align with the implementation of new attendance boundary lines, Phase I will focus on the schools involved in phase II of Enrollment and Program Balancing. Phase I updates will be implemented in the Fall of 2023. Note that middle schools will be updated along with the associated feeder schools (for example: Hosford, while experiencing some changes for enrollment balancing - will be in phase III of the STPU because that is when the hazard zones for all of their feeder schools are completed.) Schools



involved in this phase are listed below as well as information related to enrollment balancing happening in conjunction with Phase I of the STPU.

School	Enrollment Balancing Details
Arleta	Four small areas will move from Arleta to Creston, Marysville, Woodstock and Woodmere, and two areas will move into Arleta from Bridger and Marysville.
Atkinson	A boundary change will add students to the small neighborhood program. Atkinson neighborhood students will go to Harrison Park Middle School while Atkinson Spanish Immersion students will go to Kellogg Middle school.
Bridger	Spanish DLI relocates to Lent; Bridger neighborhood program joins with Creative Science K-8. The boundary areas south of Division street are assigned to new middle and high schools.
Clark (Currently Creative Science)	New K-5 program - Creative Science program moves to Bridger
Creston	The Creston boundary will grow slightly through a boundary change with Arleta. Creston middle school students will go to Hosford MS.
Glencoe	Part of the Glencoe boundary changes to Vestal Elementary School and Harrison Park Middle School.
Harrison Park	Harrison Park K-5 students, including Chinese Immersion, move to Clark. Grade 6-8 students are joined at Harrison Park by students from Atkinson and Vestal neighborhoods and Chinese Immersion students from Woodstock
Kellogg	The Spanish Immersion program at Mt. Tabor will move to Kellogg, so all SE Spanish Immersion programs will be at the same middle school. To offset this increase, the Creston neighborhood along with a small portion of the Arleta neighborhood will move to Hosford. A boundary change with Harrison Park will result in the Kellogg building being within its attendance area.
Kelly	No boundary changes proposed for enrollment balancing
Lane	The Lane boundary grows by adding Woodstock as a feeder school from Hosford, a portion of the Lewis area from Sellwood, and parts of the Arleta and Marysville areas from Kellogg.



Lent	Lent will convert to a whole-Spanish school with the addition of two strands of Spanish Immersion from Bridger. English Scholars program will relocate to Marysville
Lewis	The eastern portion of the Lewis neighborhood will move to Whitman
Marysville	Boundary changes with Arleta and Woodmere. English scholars students from the Lent area will attend Marysville.
Mt Tabor	The Atkinson neighborhood program will move to Harrison Park MS and the Atkinson Spanish Immersion program will move to Kellogg MS. Additionally, there will be a boundary change from Mt. Tabor to Harrison Park.
Vestal	The Vestal neighborhood will grow through a boundary change with Glencoe. Both the current and new parts of the Vestal neighborhood will go to Harrison Park MS.
Whitman	The Whitman neighborhood will grow through boundary changes from Lewis and Woodmere.
Woodmere	Woodmere will grow through boundary changes with Arleta, Marysville and Woodstock, but the southern part of the boundary will move into Whitman.
Woodstock	Boundary changes from Woodstock to Woodmere and from Arleta to Woodstock will result in slightly lower neighborhood enrollment. Woodstock neighborhood students will go to Lane Middle School while Woodstock Chinese Immersion students will go to Harrison Park Middle school.

## Hazard Zone Creation

Hazard zones are defined as the areas within a school walk zone where students would have to walk further than the distance limit to reach the school when restrictions are put in place to prohibit unsafe routes (as defined by the restriction criteria defined below).

Hazard zones were generated by solving the shortest walking route from each residential address point within a school’s walk zone with safety restrictions enforced. All the addresses that result in routes that exceed the distance limit are used to generate hazard zones where students qualify for bussing when they otherwise would not due to their address falling within the walk zone.



## Restriction Criteria

Effective speed limit considers school zone speed limits where mapped school zones have signage to indicate a reduced speed limit for schools.

### Restriction Criteria

**\*see appendix b for image examples of criteria**

- Walking restricted if speed limit over 20 mph or high crash network and no sidewalk present
- Crossing restricted when speed limit over 20 mph and no crossing controls (signal and/or crosswalk)
- Crossing restricted when speed limit over 25, the street is two lanes and a four-way stop or a crossing with a signal and crosswalk is not present
- Crossing restricted when speed limit over 25, the street is more than two lanes and a crossing with a signal and crosswalk is not present
- Crossing restricted when road is part of high crash network, the street is two lanes and a four-way stop or a crossing with a signal and crosswalk is not present
- Crossing restricted when road is in the high crash network, the street is more than two lanes and a crossing with a signal and crosswalk is not present
- Crossing restricted if road is four lanes or more in a high crash network
  - Exception for crossings in school zones with a crosswalk and traffic controls present

## Field Validation and Overrides

Transportation staff assessed restricted areas to verify the validity of the model. The model proved to correctly reflect Transportation standards a majority of the time. The Transportation Field Team utilized ESRI's Field Maps to override model data when field conditions did not align with the data informing the model output.

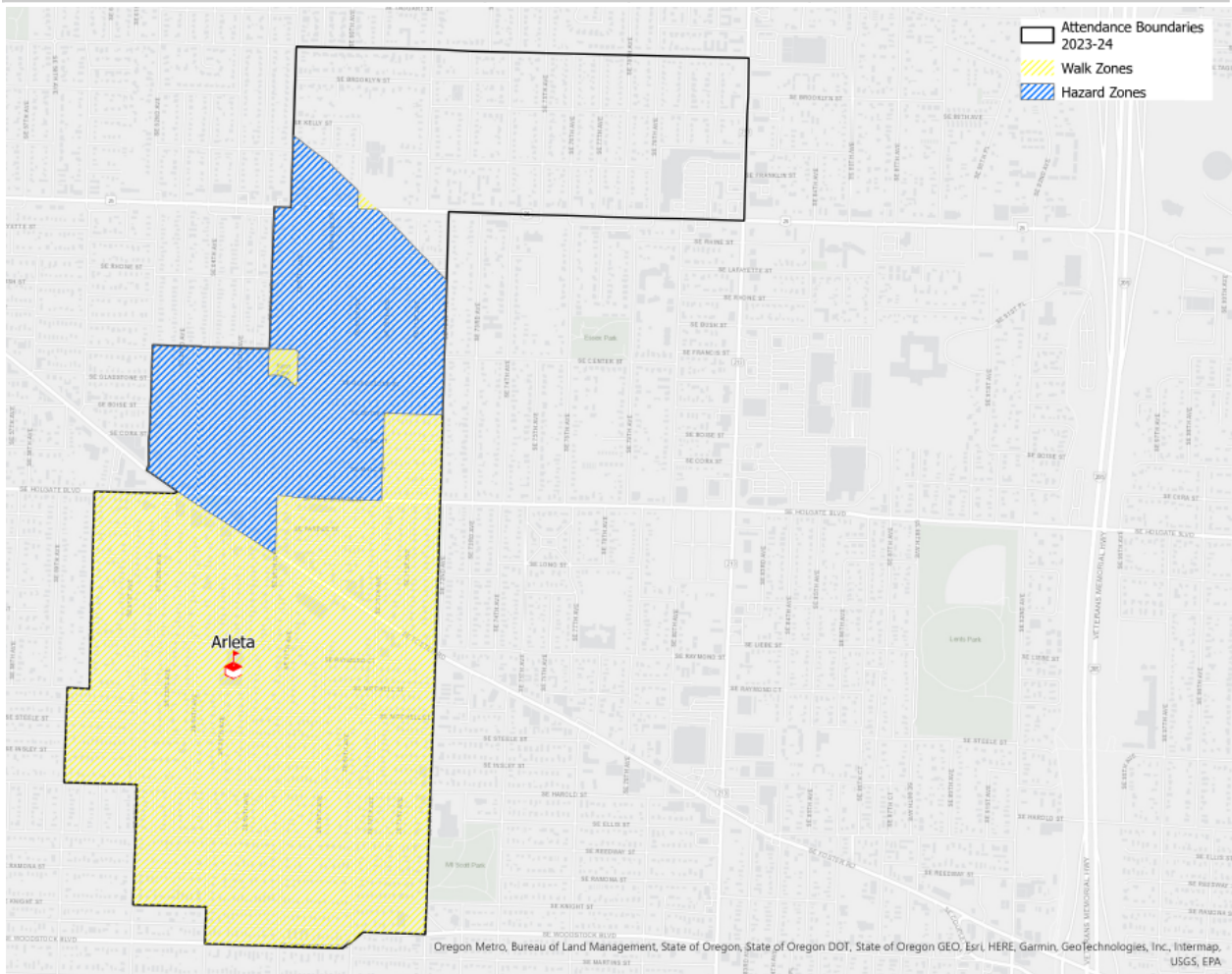
Transportation Staff has the ability to continue analyzing field conditions, including socio-cultural factors, against model data and override as field conditions change and/or come to our attention.

## Phase I Recommendations and Impacts by School



# Arleta

22/23 SY Summary (Current)	# of GT buses 22/23	Estimated GT buses due to STPU 23/24	STPU Recommendation
Service provided for neighborhood students - feeds into Kellogg. Only small portions of the attendance boundary are eligible for service, a very short route with low ridership. Walking students cross Foster and Holgate at some intersections.	1	1	No crossing Powell or near the intersection of Holgate and Foster. Crossing allowed in other sections of Holgate and Foster. No added vehicles necessary for STPU, however current bus will be at capacity

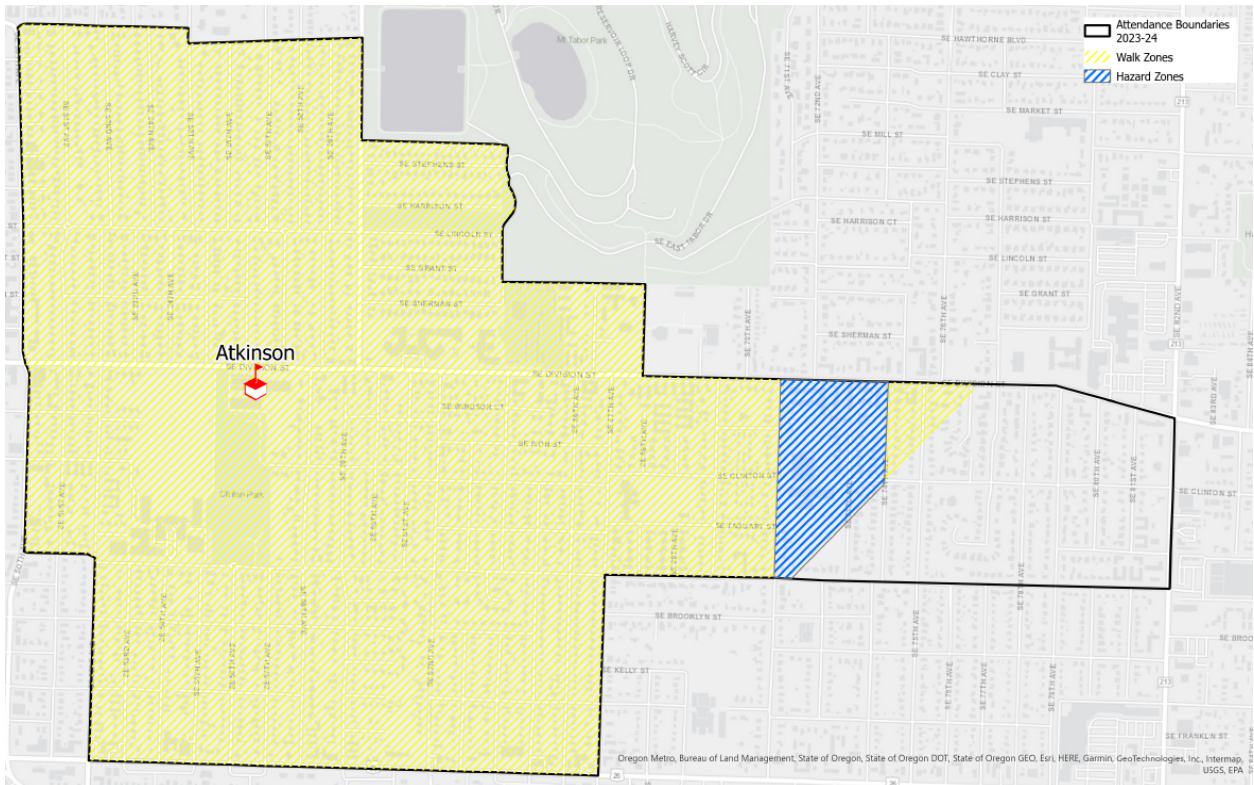


Net Routes due to STPU	Estimated # Students gaining eligibility	Estimated # Students losing eligibility
0	52	0



# Atkinson

22/23 SY Summary (Current)	# of GT buses 22/23	Estimated GT buses due to STPU 23/24	STPU Recommendation
No bus service provided for GT - Entire attendance boundary is within walkable distance. No hazard areas.	0	0	Small hazard area directly next to attendance area expansion due to enrollment balancing. Buses will need to be added due to attendance boundary change but not due to STPU

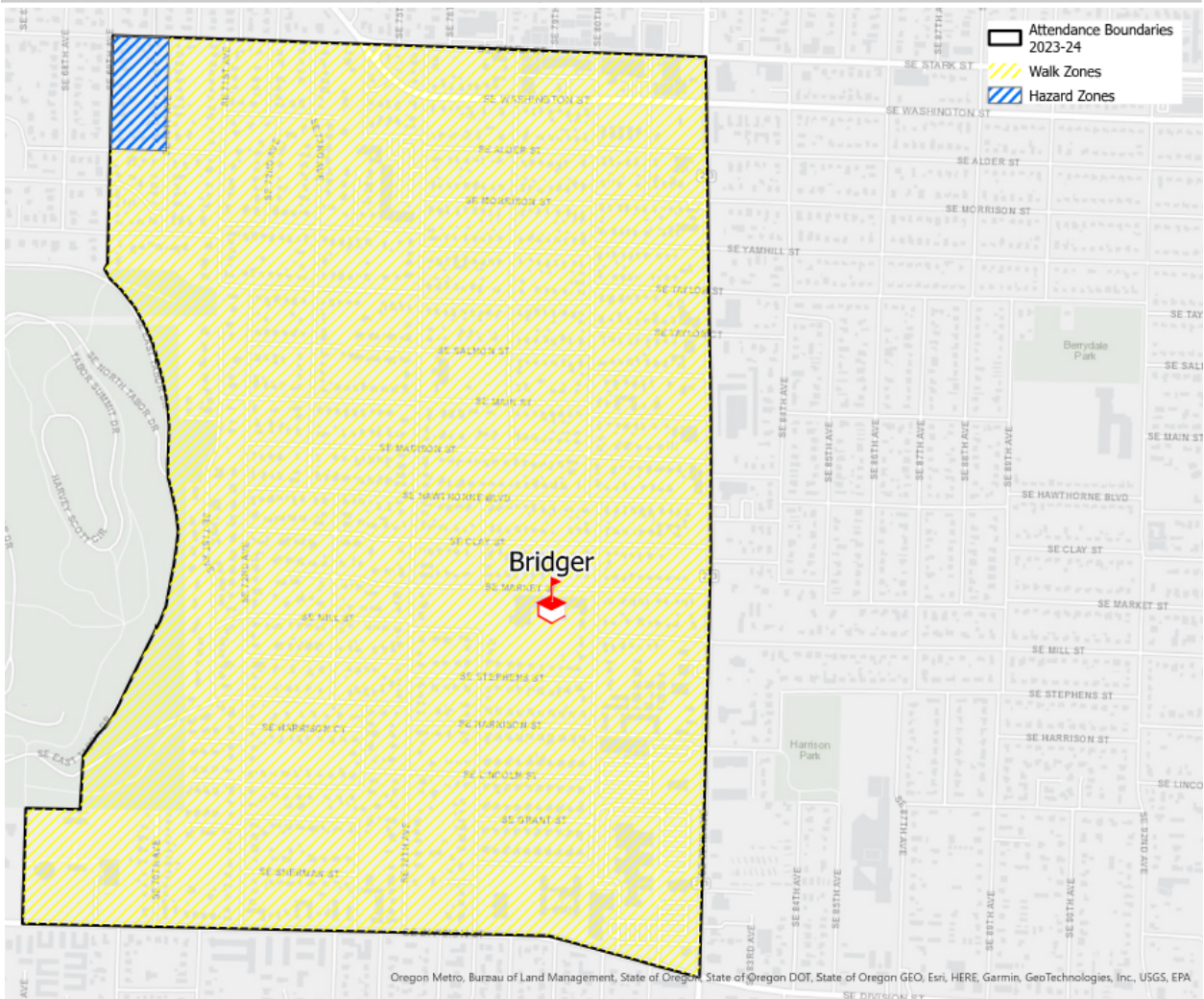


Net Routes due to STPU	Estimated # Students gaining eligibility	Estimated # Students losing eligibility
0	0 - (hazard area only within the new attendance boundary)	0



# Bridger

22/23 SY Summary (Current)	# of GT buses 22/23	Estimated GT buses due to STPU 23/24	STPU Recommendation
Service provided for neighborhood and DLI programs. Has no supplemental hazard stops.	2	1	Only hazard due to added walk distance for a small section of the district



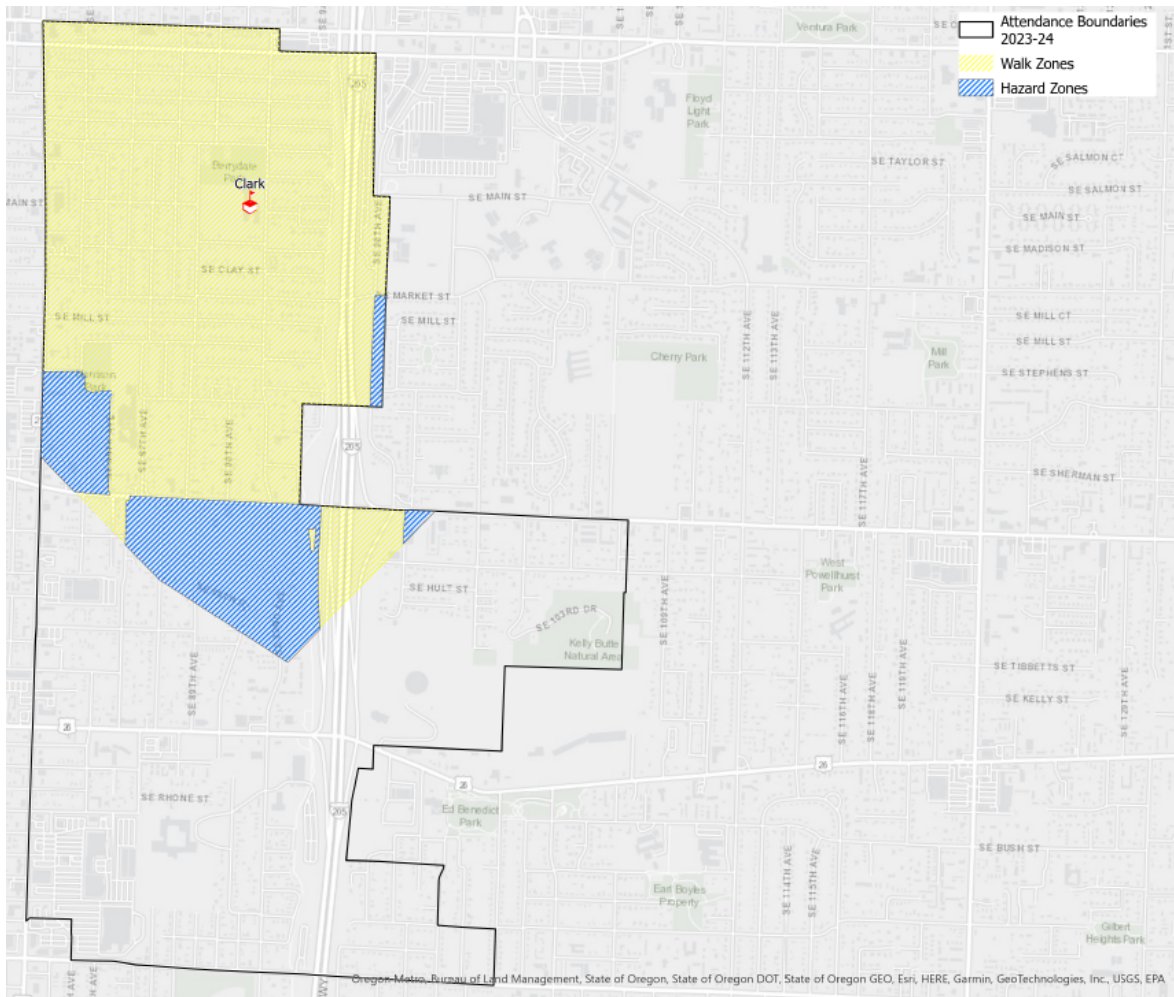
Net Routes due to STPU	Estimated # Students gaining eligibility	Estimated # Students losing eligibility
-1	3	0

\*Transitional transportation service will be provided for 5 years per SEGC Transportation Guarantees, see appendix a.



# Clark

22/23 SY Summary (Current)	# of GT buses 22/23	Estimated GT buses due to STPU 23/24	STPU Recommendation
Currently Creative Science School with no GT transportation provided. School community attending Harrison Park.	0	0	No crossing I-205 and limited crossing on Division. Regular transportation will be provided in the southern and eastern parts of the attendance boundary. Supplemental transportation in small areas south of division and east of I-205. Buses will be added due to program balancing, nothing additional will need to be added for STPU

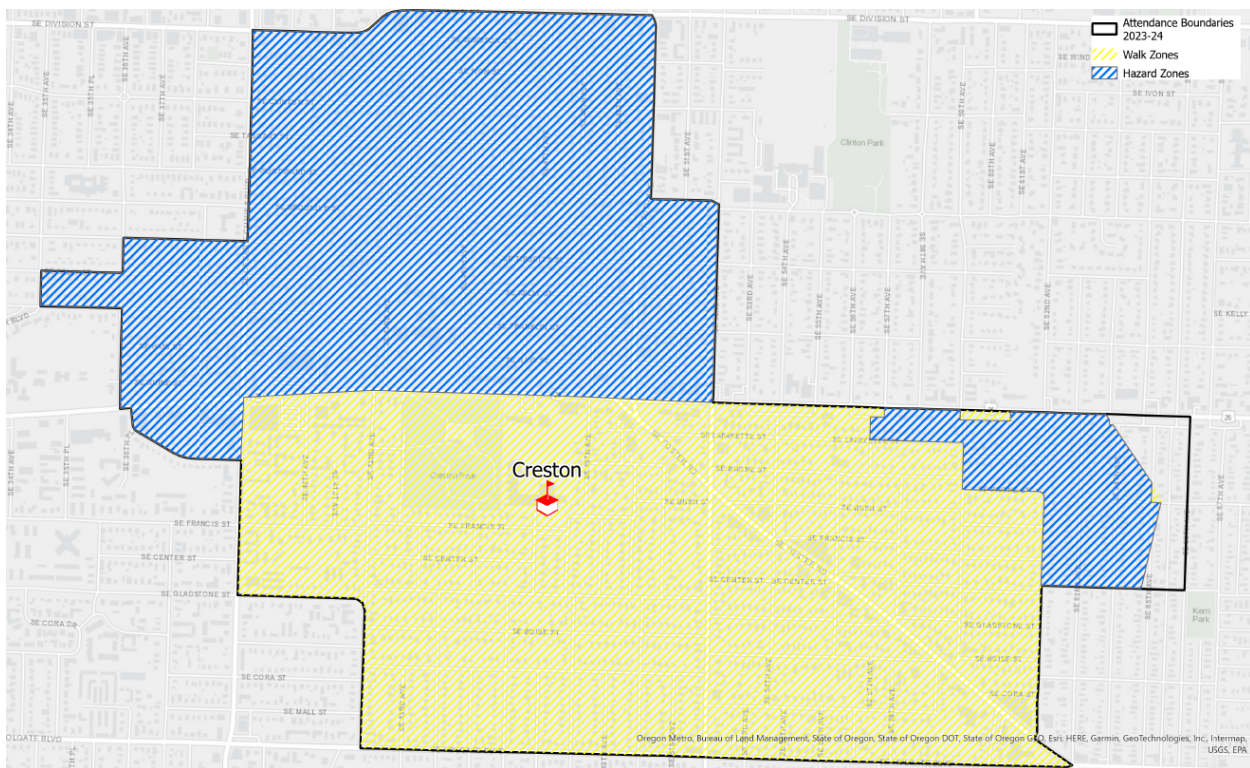


Net Routes Servicing Supplemental Transportation	Estimated # Students gaining eligibility	Estimated # Students losing eligibility
0	20	0



# Creston

22/23 SY Summary (Current)	# of GT buses 22/23	Estimated GT buses due to STPU 23/24	STPU Recommendation
Service provided for neighborhood students.- feeds to Kellogg - no supplemental transportation provided.	1	2	Hazard zone in the entire area north of Powell and west of Cesar Chavez. Small additional hazard zone in the easternmost area of the walk boundary due to limited crossings on 52nd and Foster Roads.

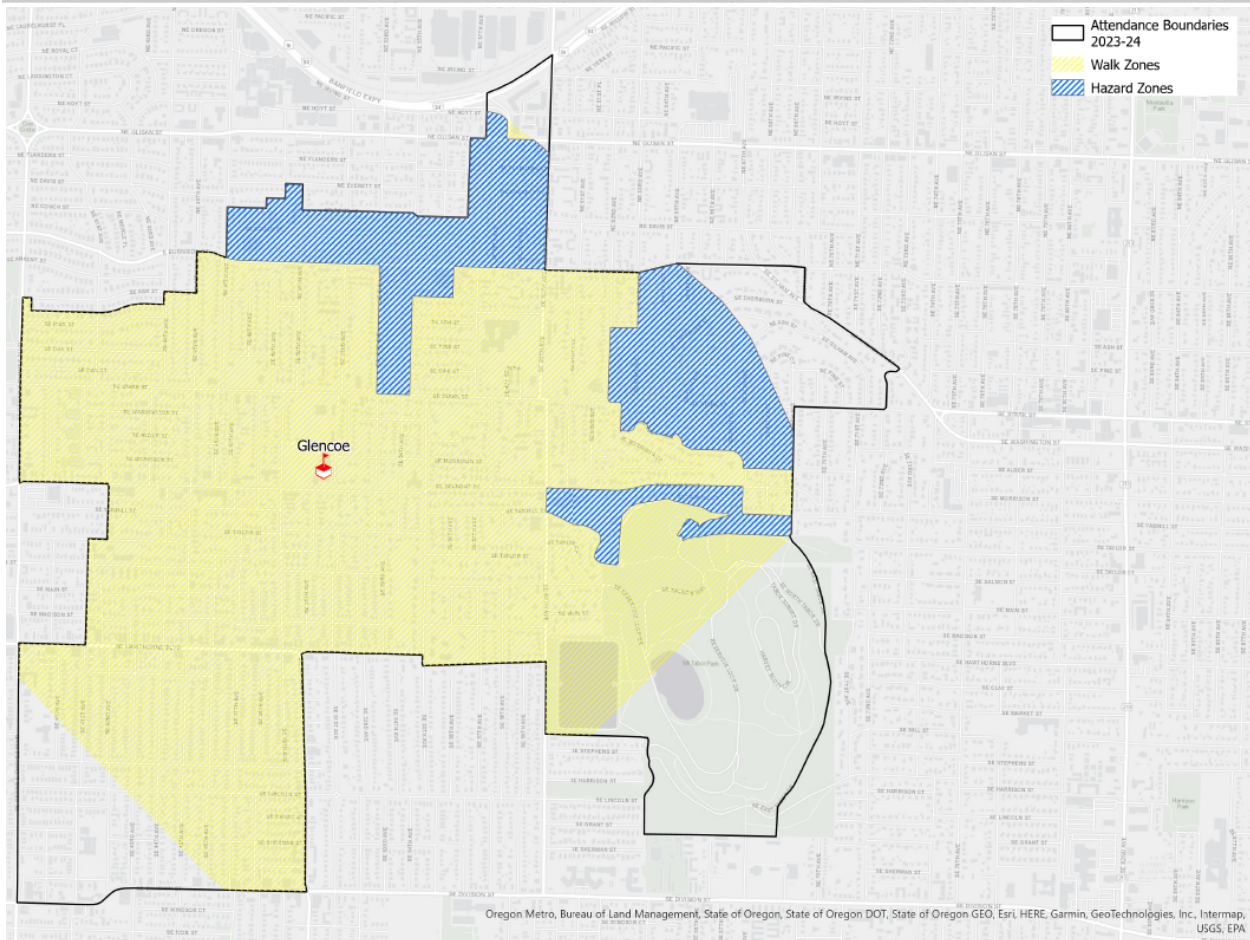


Net Routes Servicing School	Estimated # Students gaining eligibility	Estimated # Students losing eligibility
1	74	0



# Glencoe

22/23 SY Summary (Current)	# of GT buses 22/23	Estimated GT buses due to STPU 23/24	STPU Recommendation
Service provided for neighborhood students. Has a small area with supplemental hazard service.	2	2	No crossing Burnside in the Glencoe boundary. No walking on streets without sidewalks North of Mt. Tabor. No additional routes needed for STPU, however, buses will be at capacity.

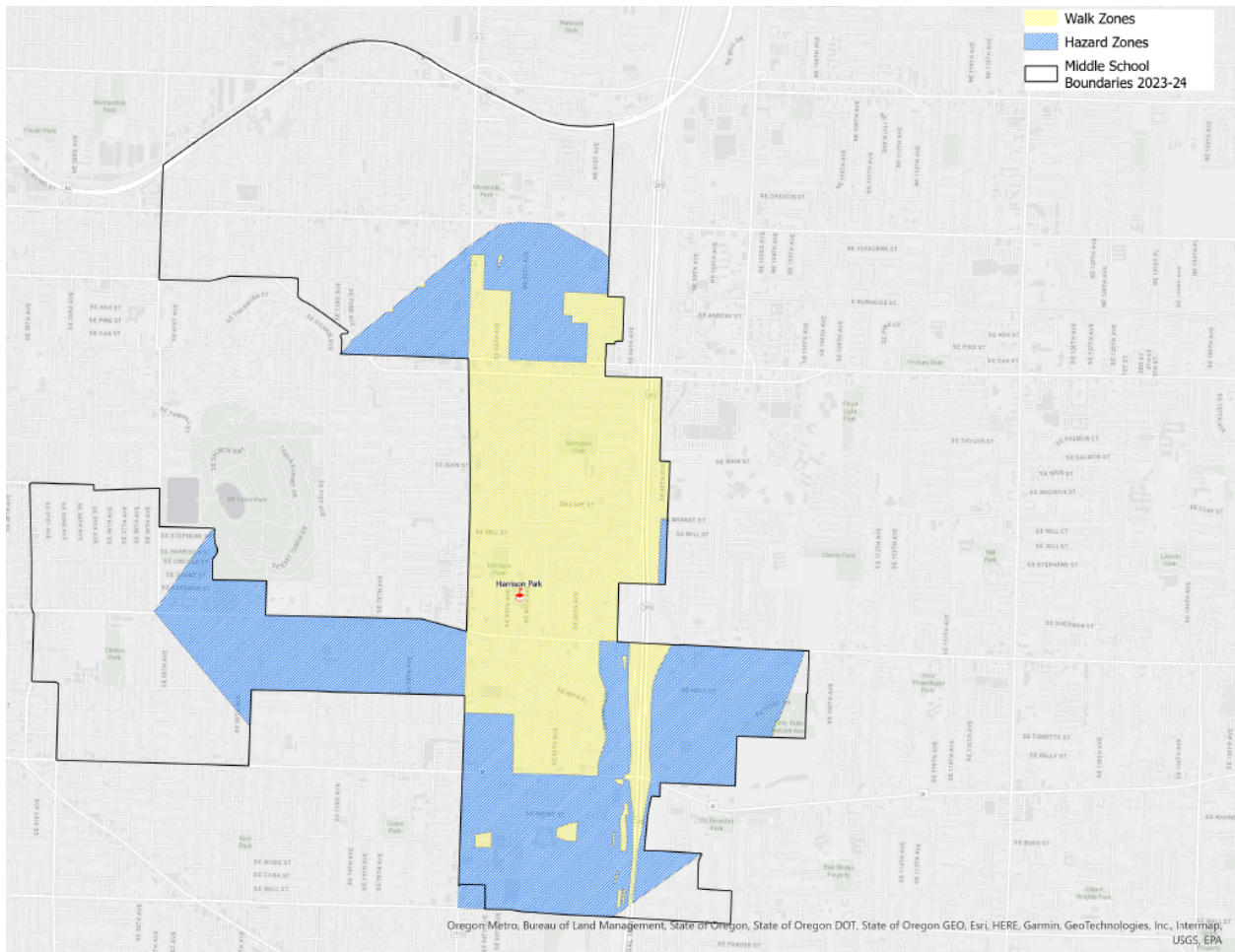


Net Routes Servicing School	Estimated # Students gaining eligibility	Estimated # Students losing eligibility
0	52	0



# Harrison Park

22/23 SY Summary (Current)	# of GT buses 22/23	Estimated GT buses due to STPU 23/24	STPU Recommendation
Service provided for neighborhood students. Supplemental Hazard boundary. Currently a K-8 school walk boundary is 1 mile radius	3	1	No crossing Powell, 82nd or I-205. Limited crossing on Stark. Multiple hazard zones include a large area north of Stark, the entire areas west of 82nd, South of Powell blvd and East of I-205. Routes will be added due to program balancing but only one additional is estimated to be needed for STPU.

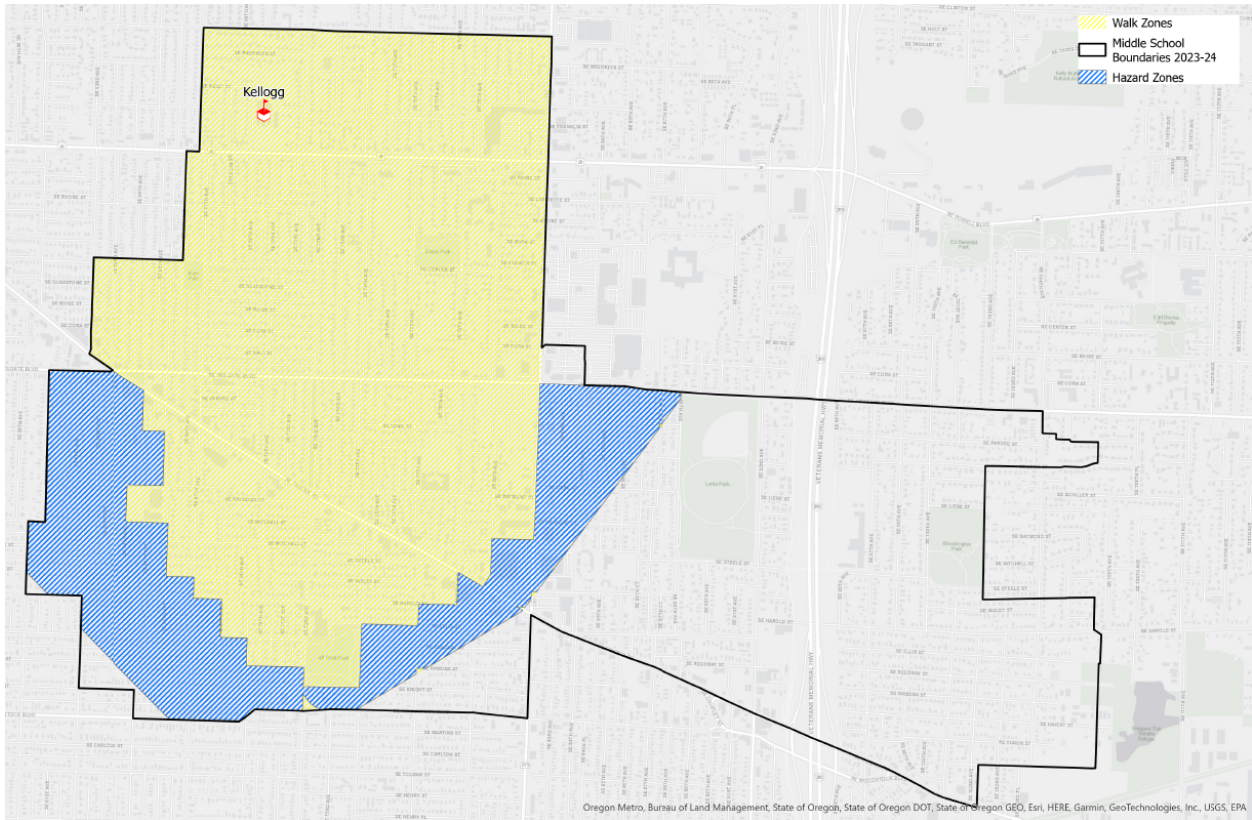


Net Routes Servicing School	Estimated # Students gaining eligibility	Estimated # Students losing eligibility
1	73	0



# Kellogg

22/23 SY Summary (Current)	# of GT buses 22/23	Estimated GT buses due to STPU 23/24	STPU Recommendation
Service provided for neighborhood students and DLI	6	0	No crossing Powell in the majority of the district. Crossing on 69th okay due to proximity to the school. Large portion of new hazard area in new attendance area, no added routes due to STPU.

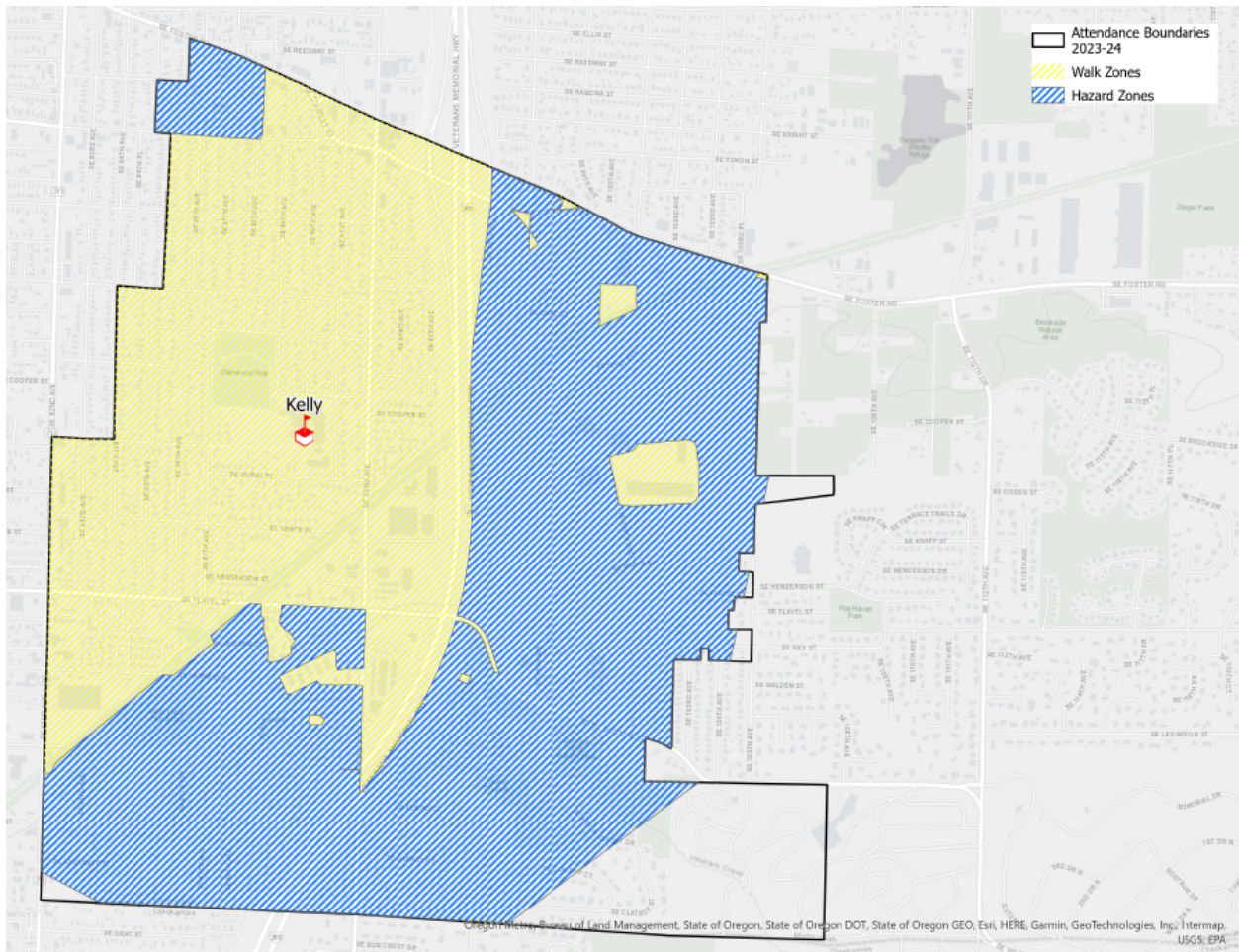


Net Routes Servicing School	Estimated # Students gaining eligibility	Estimated # Students losing eligibility
0	20	0



# Kelly

22/23 SY Summary (Current)	# of GT buses 22/23	Estimated GT buses due to STPU 23/24	STPU Recommendation
Transportation for neighborhood students. Receives supplemental transportation. Entire attendance area east of I-205 receives transportation - some is supplemental. Southwestern part of the boundary is outside of the walk zone.	2	0	No crossing 1-205 or 92nd Ave, limited crossing on springwater trail.

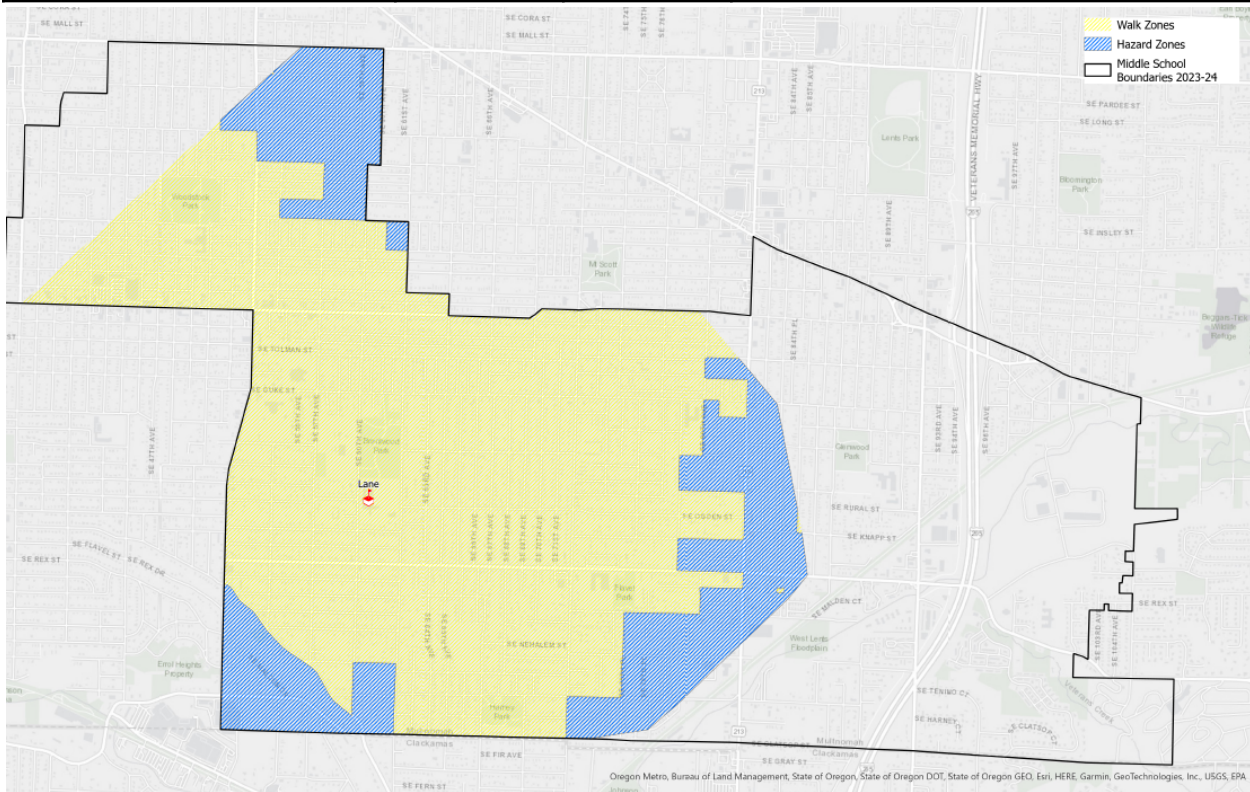


Net Routes Servicing School	Estimated # Students gaining eligibility	Estimated # Students losing eligibility
0	46	0



# Lane

22/23 SY Summary (Current)	# of GT buses 22/23	Estimated GT buses due to STPU 23/24	STPU Recommendation
Bus service provided for neighborhood students. No supplemental hazard boundary. Transportation provided in the large eastern portion of the attendance boundary.	4	0	No crossing on 82nd in this area, limited crossing on Woodstock and Flavel. Supplemental transportation provided on outer edges of the walk boundary. Bus will need to be added due to enrollment balancing, but none due to STPU

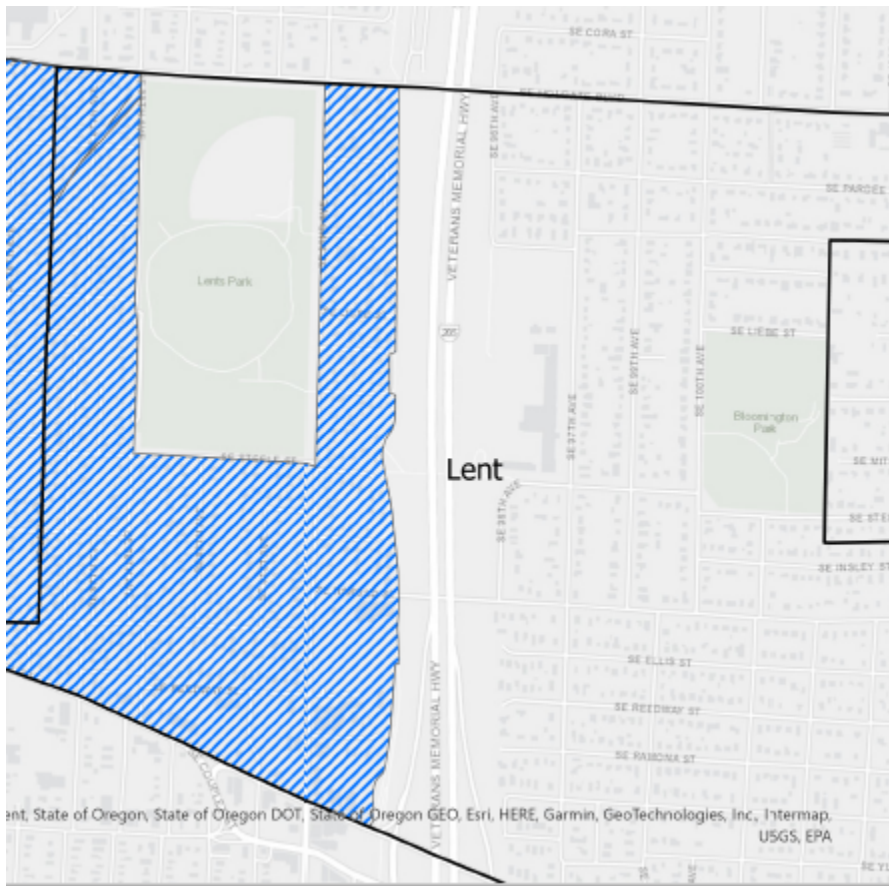


Net Routes Servicing School	Estimated # Students gaining eligibility	Estimated # Students losing eligibility
0	42	0



## Lent

22/23 SY Summary (Current)	# of GT buses 22/23	Estimated GT buses due to STPU 23/24	STPU Recommendation
Service provided for neighborhood and DLI programs. Has a supplemental hazard boundary, the entire area west of I-205.	2	0	No change in supplemental transportation, hazard zone west of 205 remains. Entire area east of I-205 is walkable. Bus will need to be added for program balancing only.

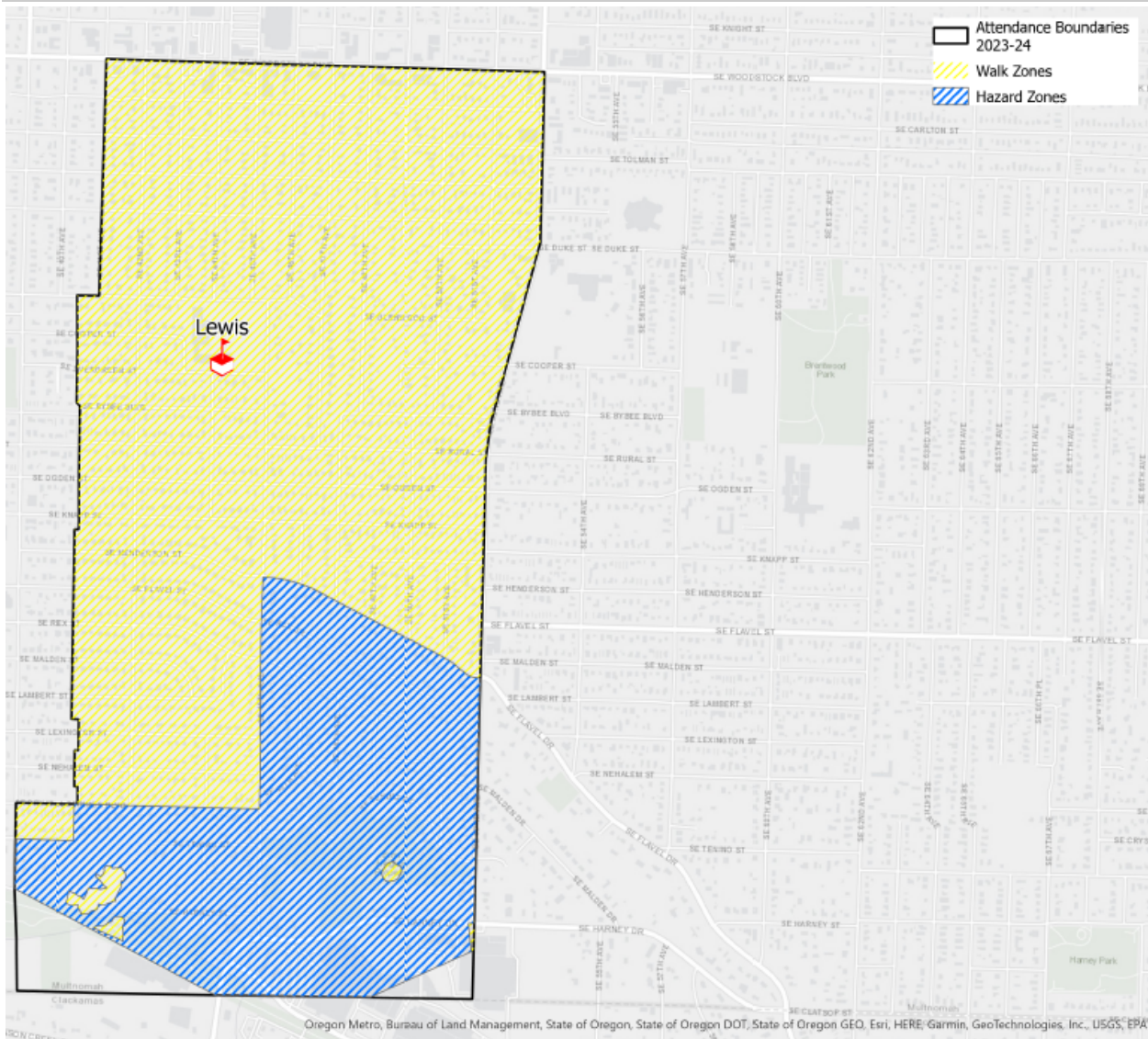


Net Routes Servicing School	Estimated # Students gaining eligibility	Estimated # Students losing eligibility
0	0	0



# Lewis

22/23 SY Summary (Current)	# of GT buses 22/23	Estimated GT buses due to STPU 23/24	STPU Recommendation
No bus service provided for GT - Entire attendance boundary is within walkable distance. No hazard areas.	0	1	Hazard zones added in areas in the southernmost part of the attendance boundary where students would have to walk on portions of 45th ave that doesn't have a sidewalk.

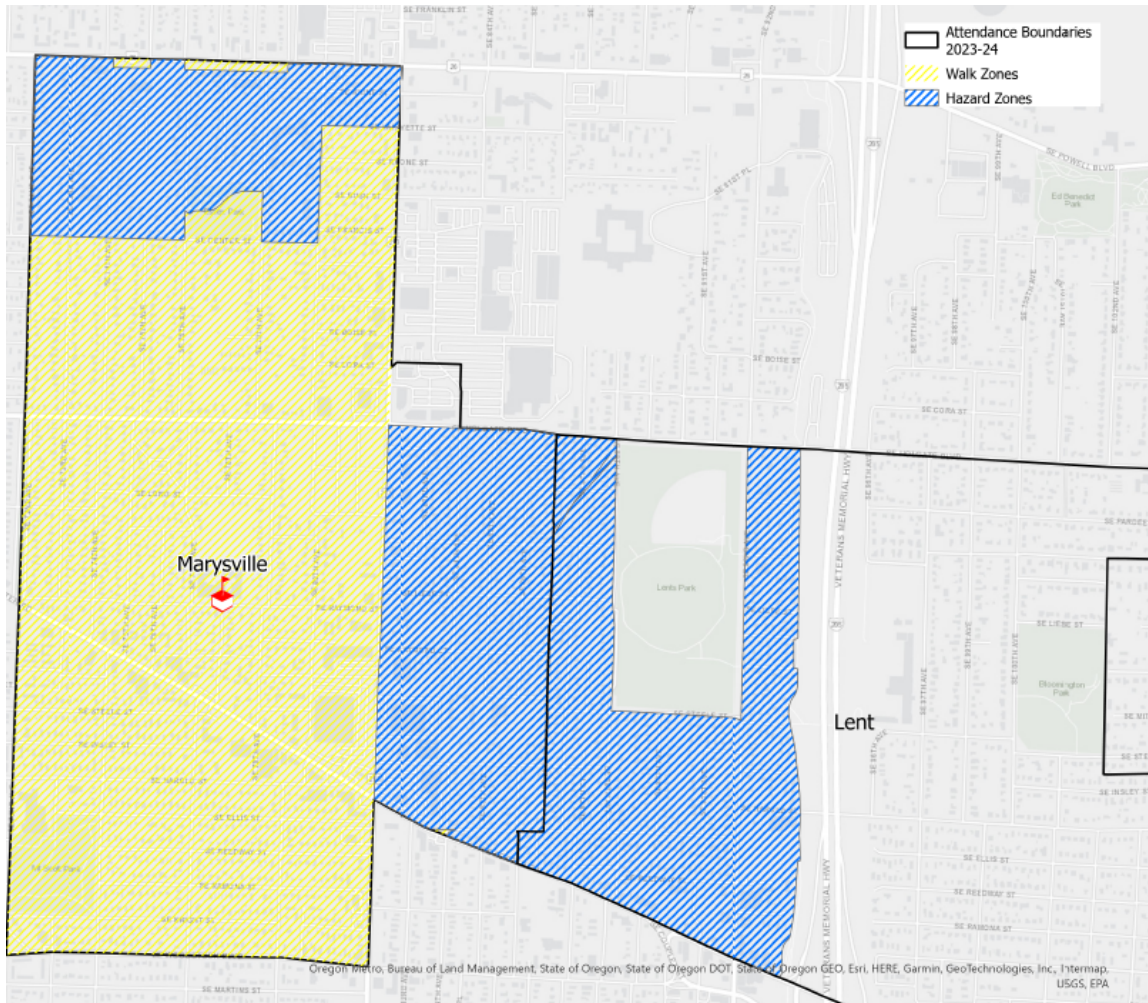


Net Routes Servicing School	Estimated # Students gaining eligibility	Estimated # Students losing eligibility
1	34	0



# Marysville

22/23 SY Summary (Current)	# of GT buses 22/23	Estimated GT buses due to STPU 23/24	STPU Recommendation
No bus service provided for GT - entire attendance area in walk boundary	0	1	Entire area east of 82nd is a hazard zone. Small area off of Powell in the northernmost area of the walk boundary.No crossing 82nd, limited crossing on Holgate. No crossing I-205 or 92nd for the expanded boundary that includes Lent. Bus will need to be added due to enrollment balancing, plus one additional for additional ridership due to STPU.

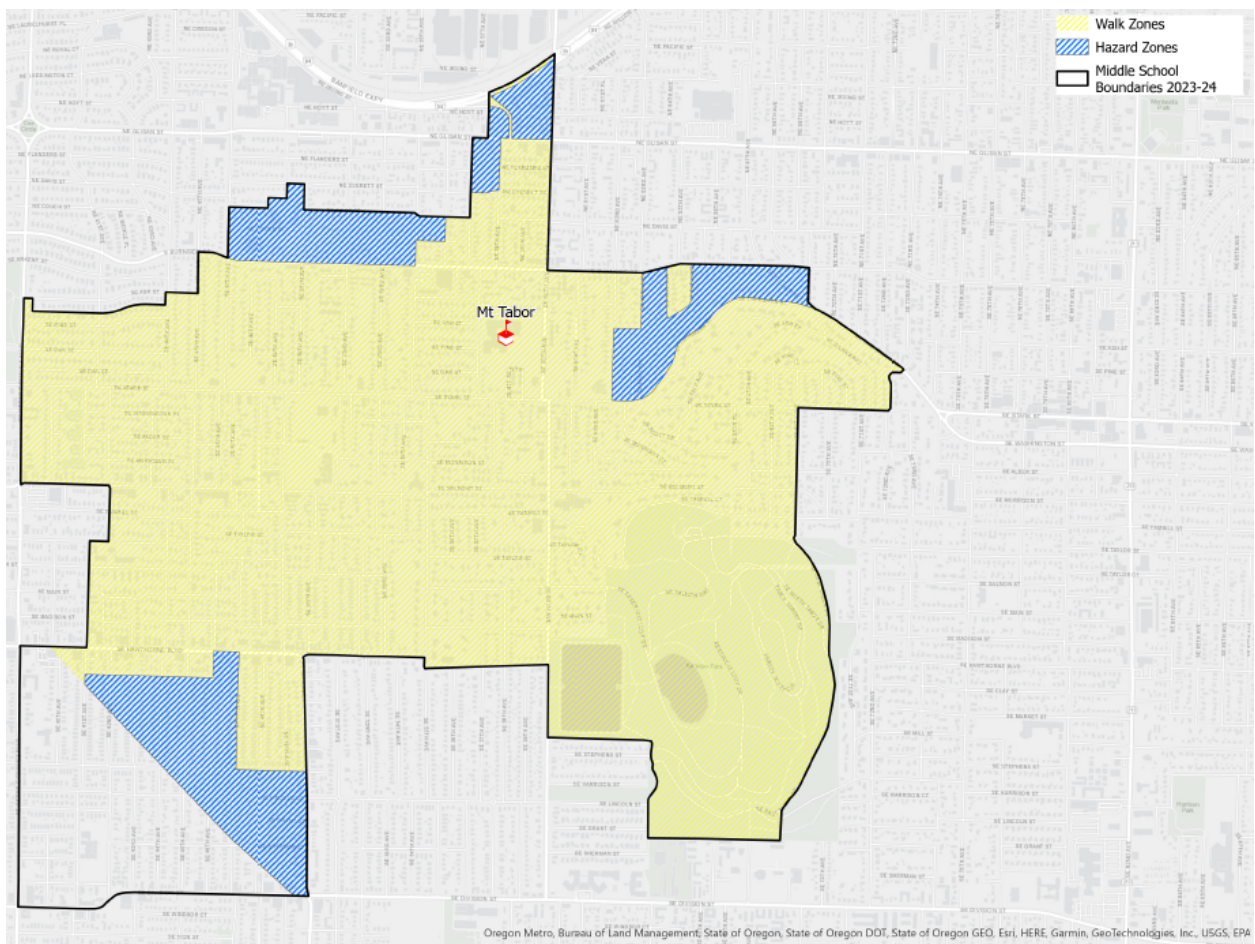


Net Routes Servicing School	Estimated # Students gaining eligibility	Estimated # Students losing eligibility
1	98	0



## Mt. Tabor

22/23 SY Summary (Current)	# of GT buses 22/23	Estimated GT buses due to STPU 23/24	STPU Recommendation
Service provided for neighborhood and DLI programs. No supplemental hazard boundary.	4	0	Limited crossing on Burnside and no walking on Thorburn. Limited crossing on Hawthorne, current routes have capacity to add students newly eligible for transportation.

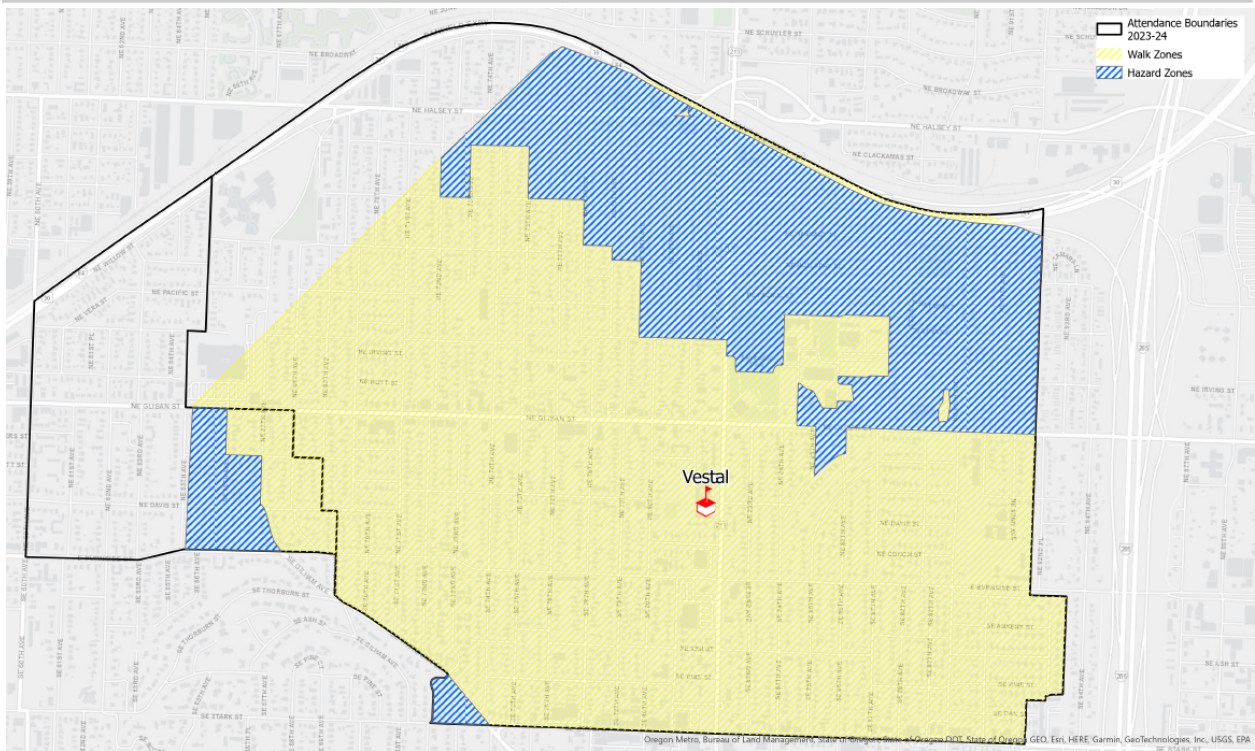


Net Routes Servicing School	Estimated # Students gaining eligibility	Estimated # Students losing eligibility
0	38	0



# Vestal

22/23 SY Summary (Current)	# of GT buses 22/23	Estimated GT buses due to STPU 23/24	STPU Recommendation
Service provided for neighborhood students, no hazard zone. Walking students cross 82nd on Stark, Burnside and Glisan	1	0	Limit crossings on Burnside and Glisan. Disallow crossings on 82nd with the exception of School Zone in front of the school. Capacity on the vehicle currently servicing school is low enough to accommodate additional students without adding a route, although the bus will be at capacity with added students.

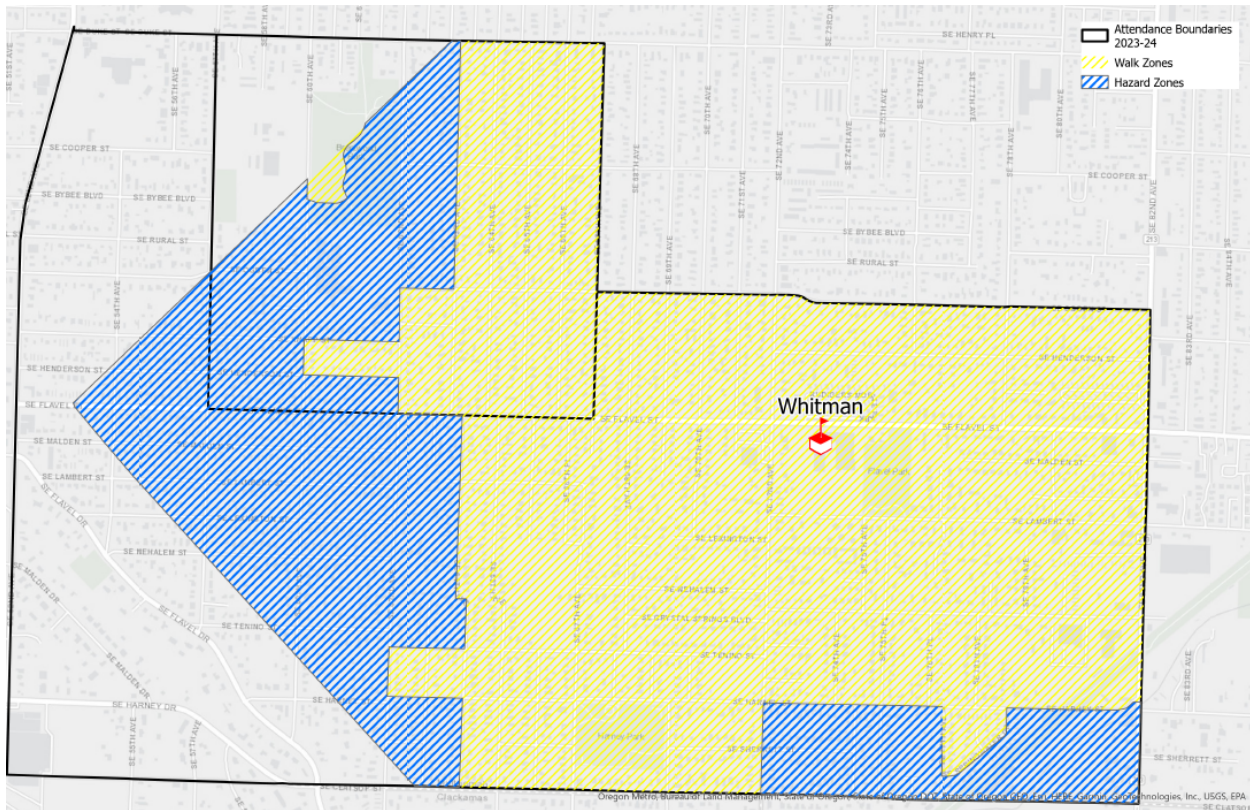


Net Routes Servicing School	Estimated # Students gaining eligibility	Estimated # Students losing eligibility
0	66	0



# Whitman

22/23 SY Summary (Current)	# of GT buses 22/23	Estimated GT buses due to STPU 23/24	STPU Recommendation
Service provided for neighborhood students. No supplemental Hazard boundary.	1	0	Many roads without sidewalks in this area limit walkability. Current vehicle has enough capacity to add additional eligible students.



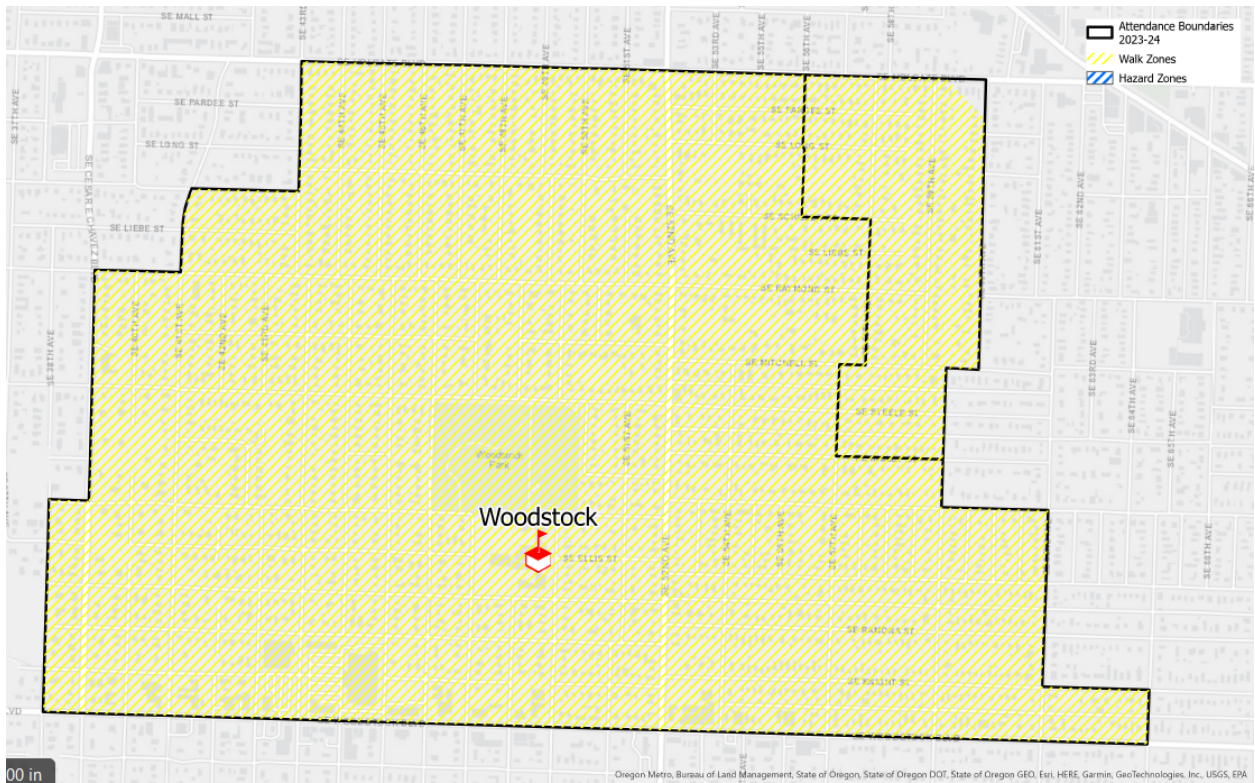
Net Routes Servicing School	Estimated # Students gaining eligibility	Estimated # Students losing eligibility
0	28	0





# Woodstock

22/23 SY Summary (Current)	# of GT buses 22/23	Estimated GT buses due to STPU 23/24	STPU Recommendation
Service provided for neighborhood and DLI programs. Has no supplemental hazard stops.	2	0	No changes, no supplemental transportation.



Net Routes Servicing School	Estimated # Students gaining eligibility	Estimated # Students losing eligibility
0	0	0

\*Transitional transportation service will be provided for 5 years per SEGC Transportation Guarantees, see appendix a.



## Cost

Estimating STPU will add **one** entire bus route.

Estimated cost per route: \$110,000

**Estimated cost for STPU added service: \$110,000**

## Appendices

- a. DRAFT - SE Portland Enrollment Balancing (SEGC) Transportation Guarantees
- b. Supplemental Transportation Plan: F&O

## Data Sources

### Road Width/Number of lanes

Number of lanes is the parameter currently used by the model. The COP Pavement Management System layer (available as a service) contains info on road width, surface type, and number of lanes. [www.portlandmaps.com](http://www.portlandmaps.com)

### Speed limits

The COP Speed Limits service. [www.portlandmaps.com](http://www.portlandmaps.com)

### School Zones

Seeing initial results in March 2022, we collectively realized the need to take school zone speed limits into account. Otherwise roads and crossings will be prohibited that are clearly signed. Some school zones have no signage whatsoever so we want to only consider mapped school zones that have a School Speed 20 sign - metadata here: <https://www.portlandoregon.gov/transportation/article/419744>.

#### School Zones

[https://www.portlandmaps.com/arcgis/rest/services/Public/COP\\_OpenData\\_Transportation/MapServer/225](https://www.portlandmaps.com/arcgis/rest/services/Public/COP_OpenData_Transportation/MapServer/225) where SchoolZone = 'Y'

#### School zone speed signs

[https://www.portlandmaps.com/arcgis/rest/services/Public/COP\\_OpenData\\_Transportation/MapServer/223](https://www.portlandmaps.com/arcgis/rest/services/Public/COP_OpenData_Transportation/MapServer/223) where SignCode = 'S1002'



### **'Incident' Points**

[https://www.portlandmaps.com/arcgis/rest/services/Public/COP\\_OpenData\\_Property/MapServer/1272](https://www.portlandmaps.com/arcgis/rest/services/Public/COP_OpenData_Property/MapServer/1272)

### **Shoulder type/sidewalks**

Metro RLIS sidewalks data (downloaded from <http://rlisdiscovery.oregonmetro.gov/?action=viewDetail&layerID=2851>)

### **Crosswalks**

[https://www.portlandmaps.com/arcgis/rest/services/Public/COP\\_OpenData\\_Transportation/MapServer/210](https://www.portlandmaps.com/arcgis/rest/services/Public/COP_OpenData_Transportation/MapServer/210) where LineType = 3621.

### **Traffic Signals**

[https://www.portlandmaps.com/arcgis/rest/services/Public/COP\\_OpenData\\_Transportation/MapServer/54](https://www.portlandmaps.com/arcgis/rest/services/Public/COP_OpenData_Transportation/MapServer/54)

### **Crash Data**

[https://gis.oregonmetro.gov/arcgis/rest/services/RHIC/Metro\\_High\\_Injury\\_corridor\\_analysis\\_2016\\_1609/MapServer/9](https://gis.oregonmetro.gov/arcgis/rest/services/RHIC/Metro_High_Injury_corridor_analysis_2016_1609/MapServer/9)



# **Supplemental Transportation Plan (STPU)**

## **-Phase I: Hazard Zone Recommendations-**

**Presented to Facilities and Operations Committee**

**3/9/23**



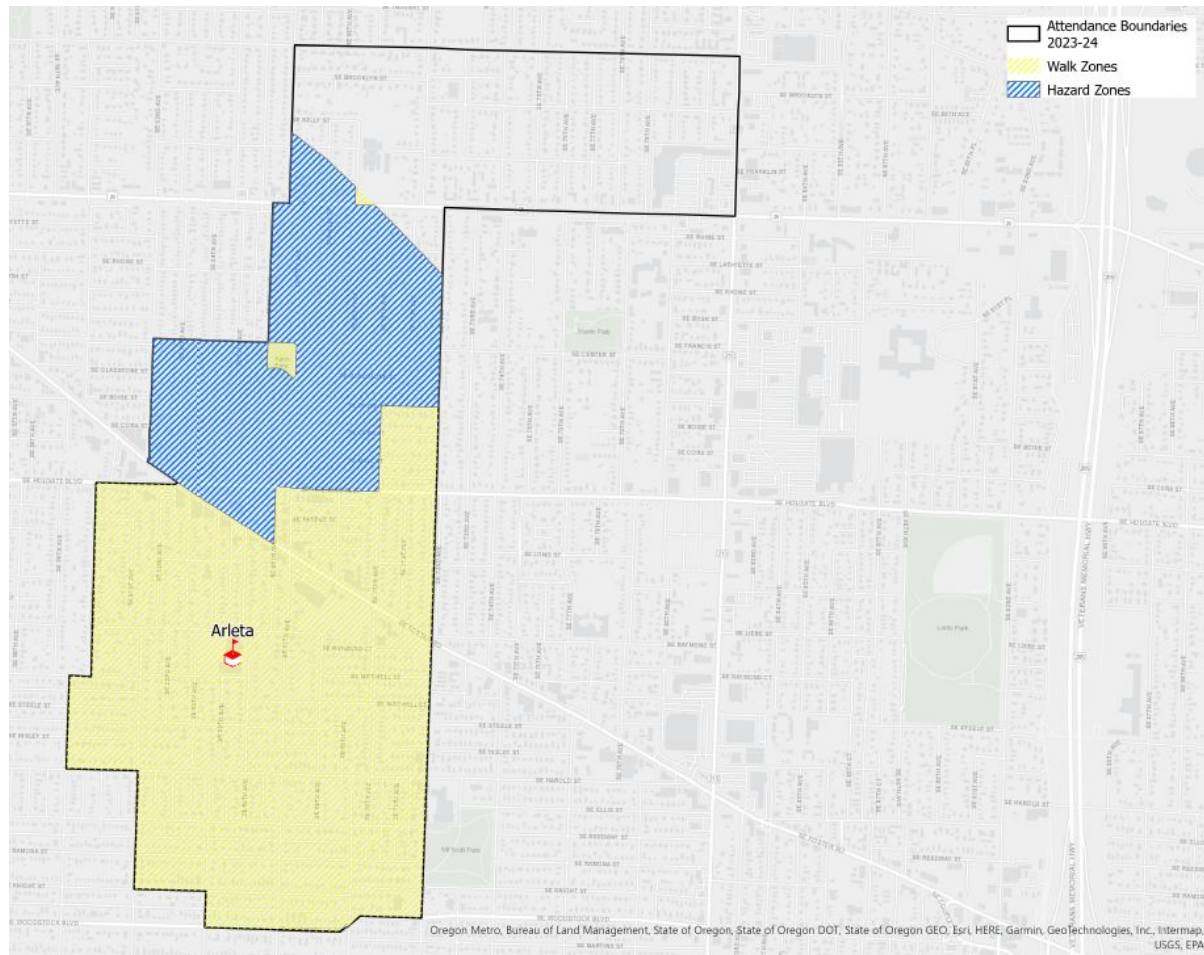


# Arleta

## STPU Recommendation

No crossing Powell in this area or near the intersection of Holgate and Foster. Crossing allowed in other sections of Holgate and Foster. No added vehicles necessary for STPU, however current bus will be at capacity

Net Routes due to STPU	Estimated # Students gaining eligibility	Estimated # Students losing eligibility
0	52	0



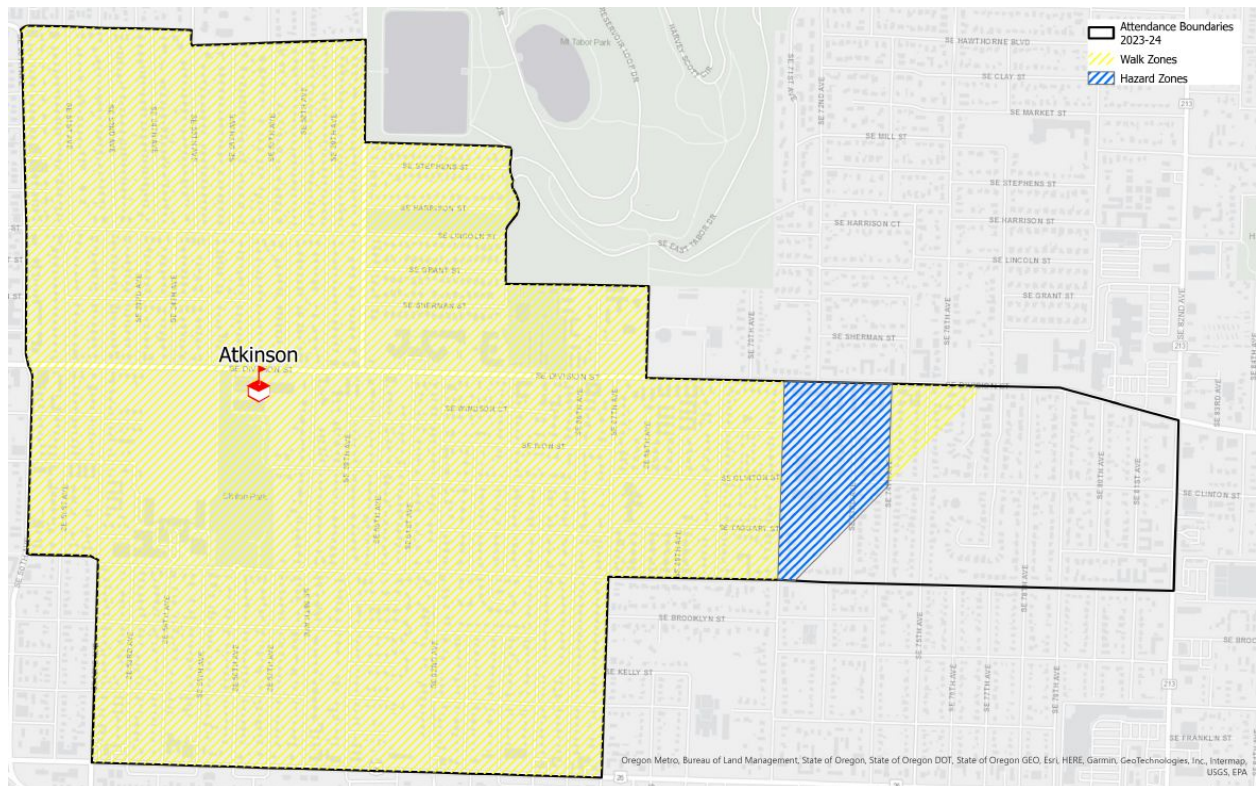


# Atkinson

## STPU Recommendation

Small hazard area directly next to attendance area expansion due to enrollment balancing. Buses will need to be added due to attendance boundary change but not due to STPU

Net Routes due to STPU	Estimated # Students gaining eligibility	Estimated # Students losing eligibility
0	0	0



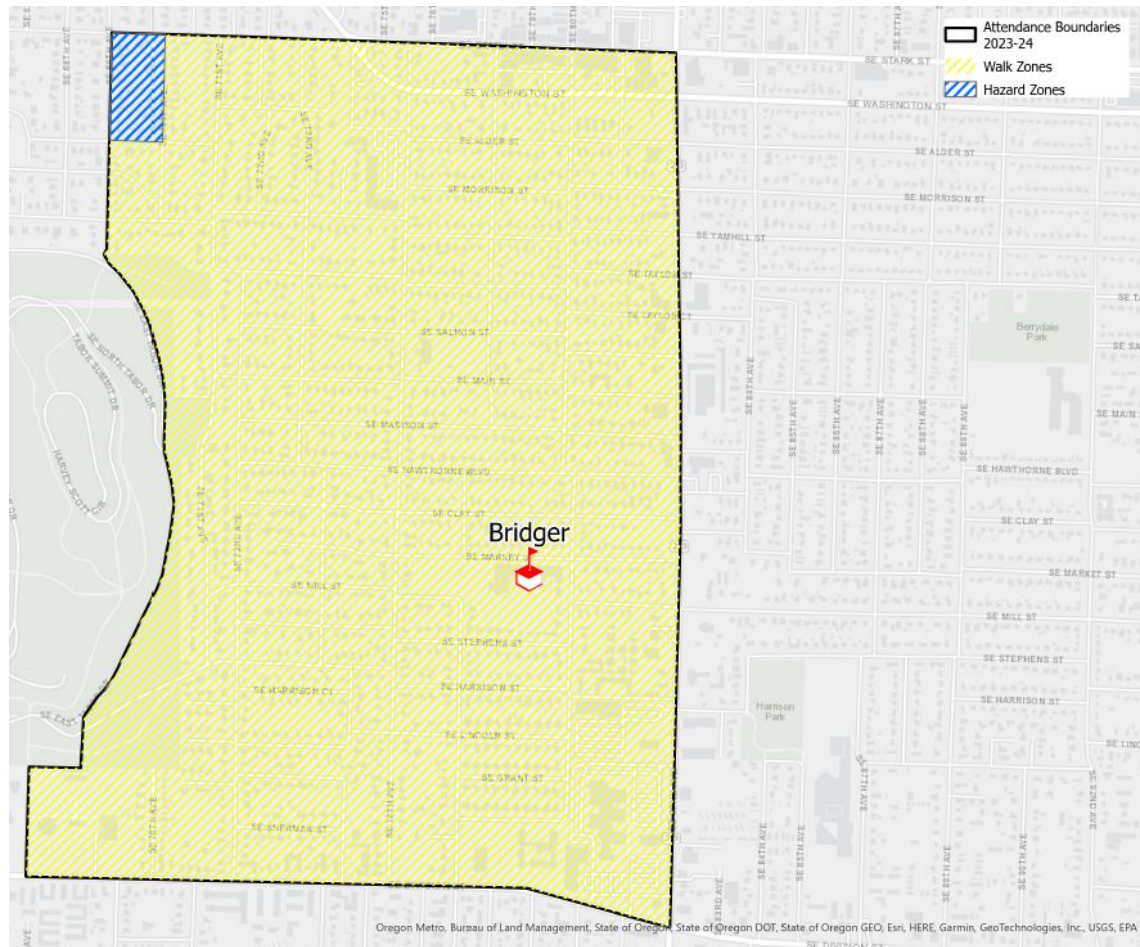


# Bridger

## STPU Recommendation

Only hazard due to added walk distance for a small section of the attendance area.

Net Routes due to STPU	Estimated # Students gaining eligibility	Estimated # Students losing eligibility
0	3	0





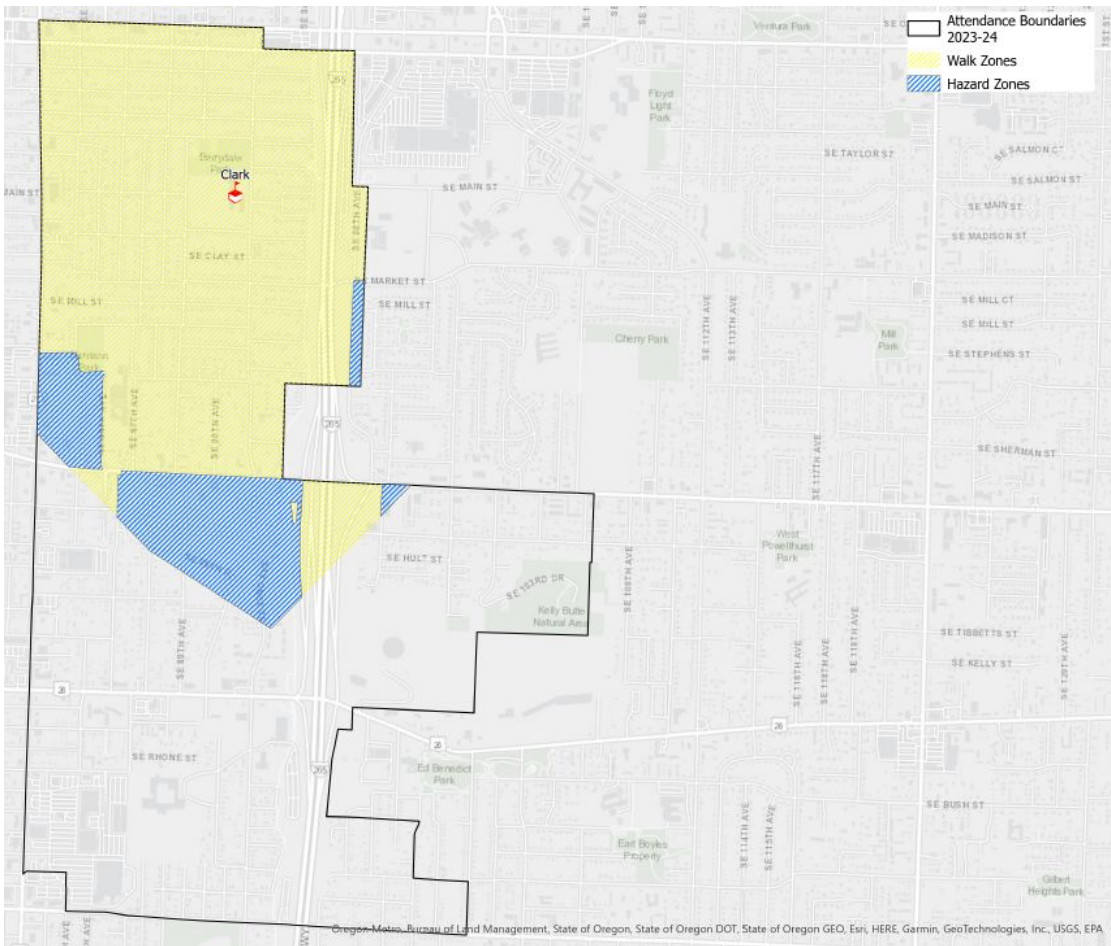
# Clark



## STPU Recommendation

No crossing I-205 and limited crossing on Division. Buses will be added due to program balancing, nothing additional will need to be added for STPU.

Net Routes due to STPU	Estimated # Students gaining eligibility	Estimated # Students losing eligibility
0	20	0



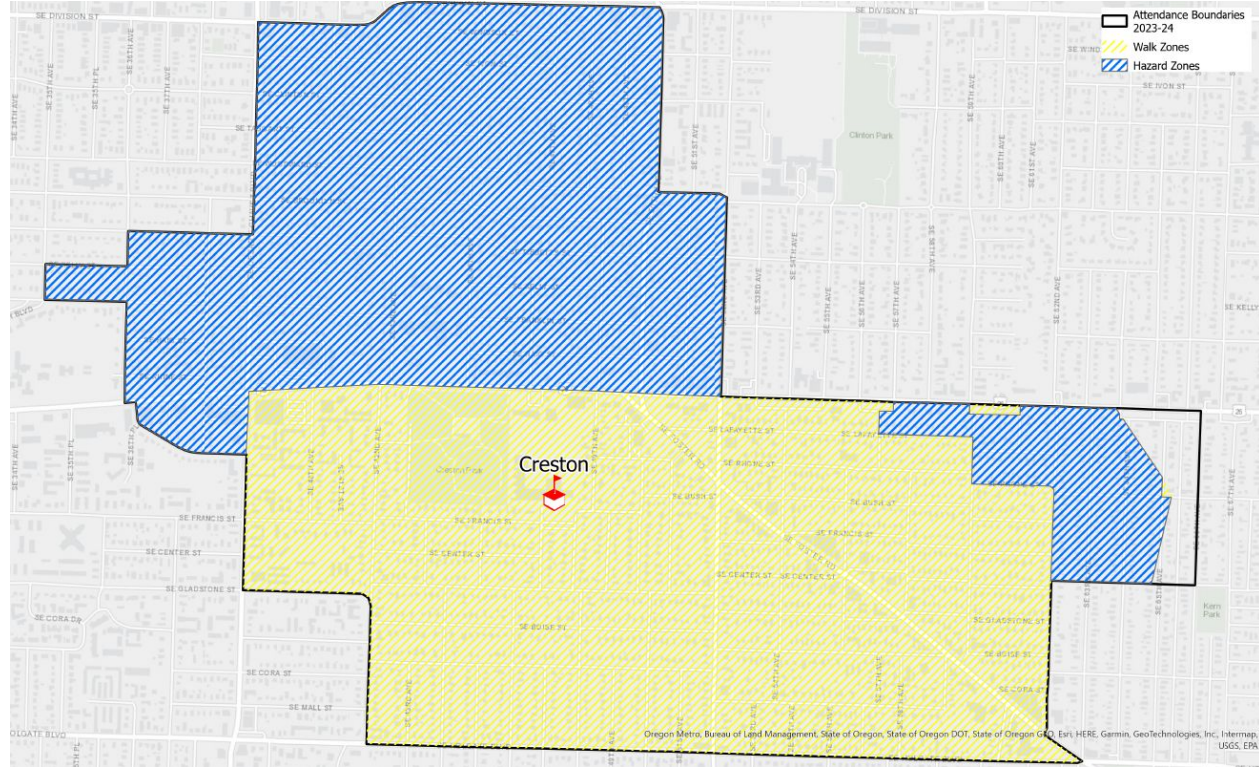


# Creston

## STPU Recommendation

Hazard zone in the entire area north of Powell and west of Cesar Chavez. Small additional hazard zone in the easternmost area of the walk boundary due to limited crossings on 52nd and Foster Roads.

Net Routes due to STPU	Estimated # Students gaining eligibility	Estimated # Students losing eligibility
1	74	0



Oregon Metro, Bureau of Land Management, State of Oregon, State of Oregon DOT, State of Oregon GEO, Esri, HERE, Garmin, GeoTechnologies, Inc., Intermap, USGS, EPA

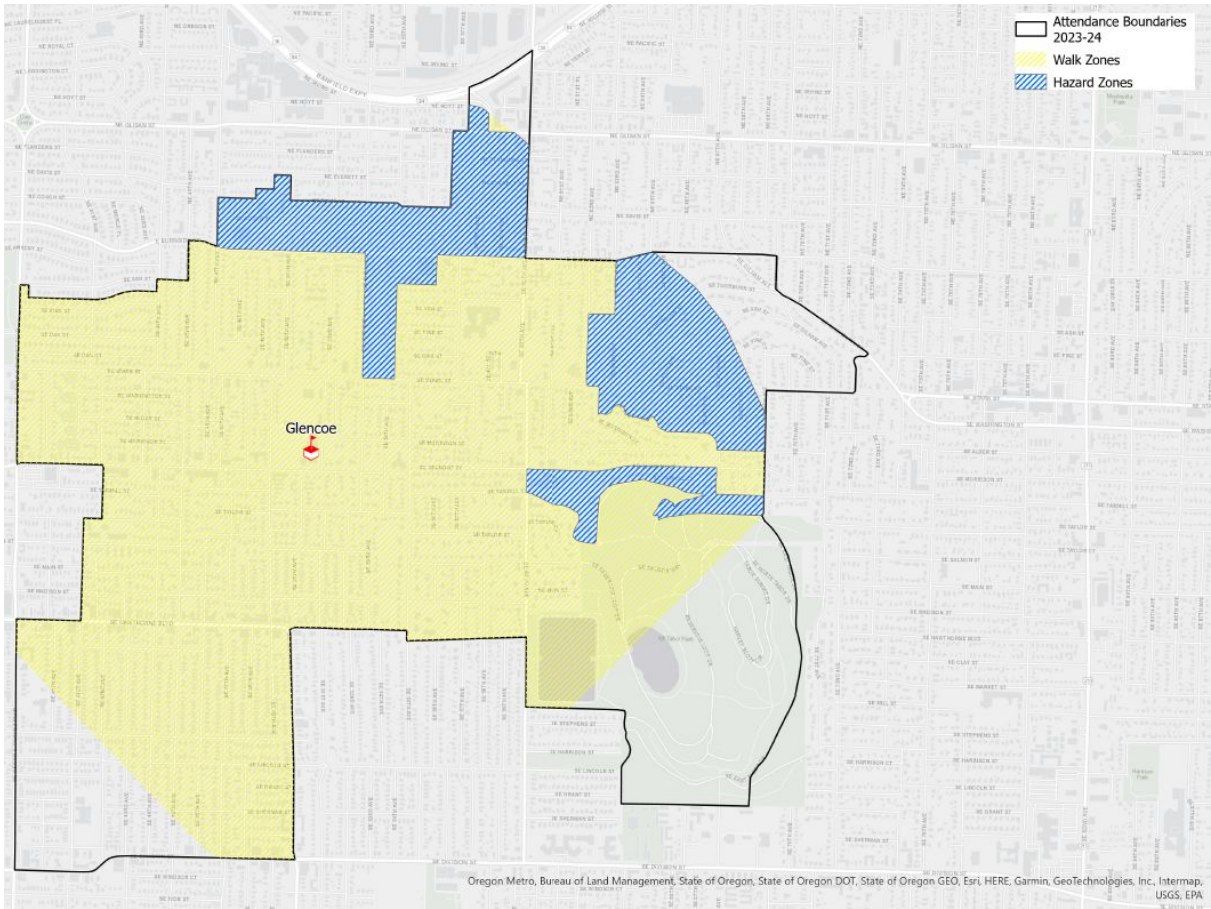


# Glencoe

## STPU Recommendation

No crossing Burnside in the Glencoe boundary. No walking on streets without sidewalks North of Mt. Tabor. No additional routes needed for STPU, however, buses will be at capacity.

Net Routes due to STPU	Estimated # Students gaining eligibility	Estimated # Students losing eligibility
0	52	0



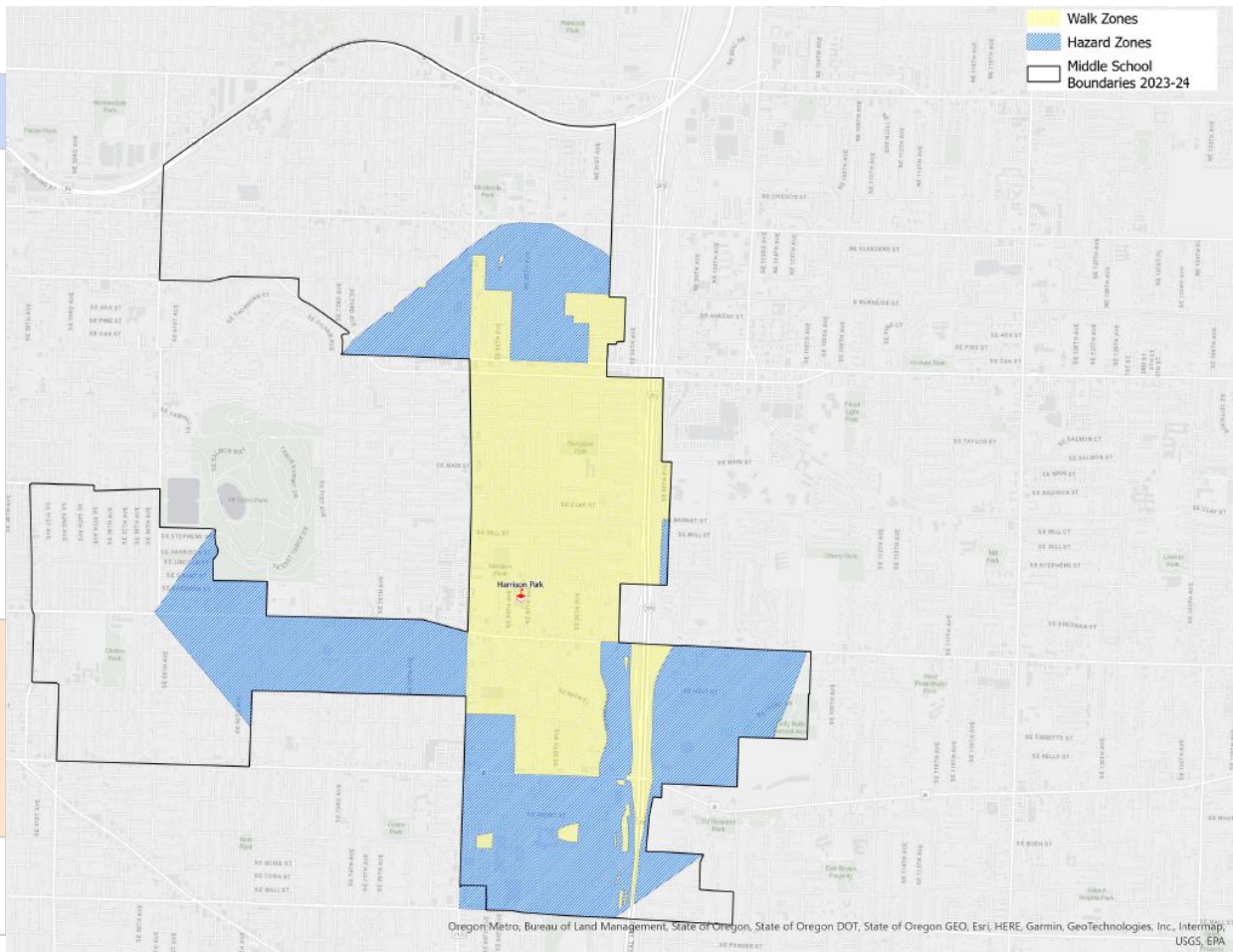


# Harrison Park

## STPU Recommendation

No crossing Powell, 82nd or I-205.  
 Limited crossing on Stark. Multiple hazard zones include a large area north of Stark, the entire areas west of 82nd, South of Powell blvd and East of I-205. Routes will be added due to program balancing but only one additional is estimated to be needed for STPU.

Net Routes due to STPU	Estimated # Students gaining eligibility	Estimated # Students losing eligibility
1	73	0

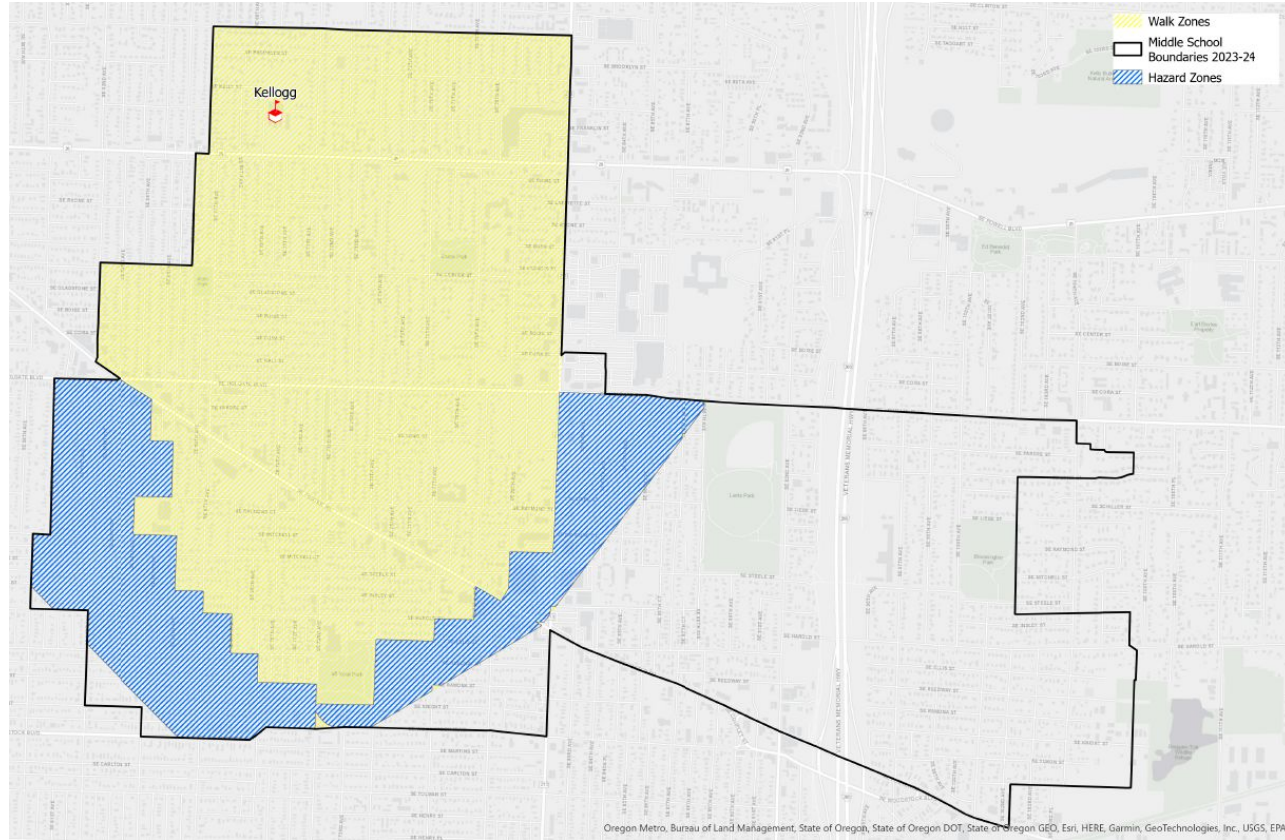




# Kellogg

## STPU Recommendation

No crossing Powell in the majority of the district. Crossing on 69th okay due to proximity to the school. Large portion of new hazard area in new attendance area, no added routes due to STPU.



Oregon Metro, Bureau of Land Management, State of Oregon, State of Oregon DOT, State of Oregon GEO, Eri, HERE, Garmin, GeoTechnologies, Inc., USGS, EPA

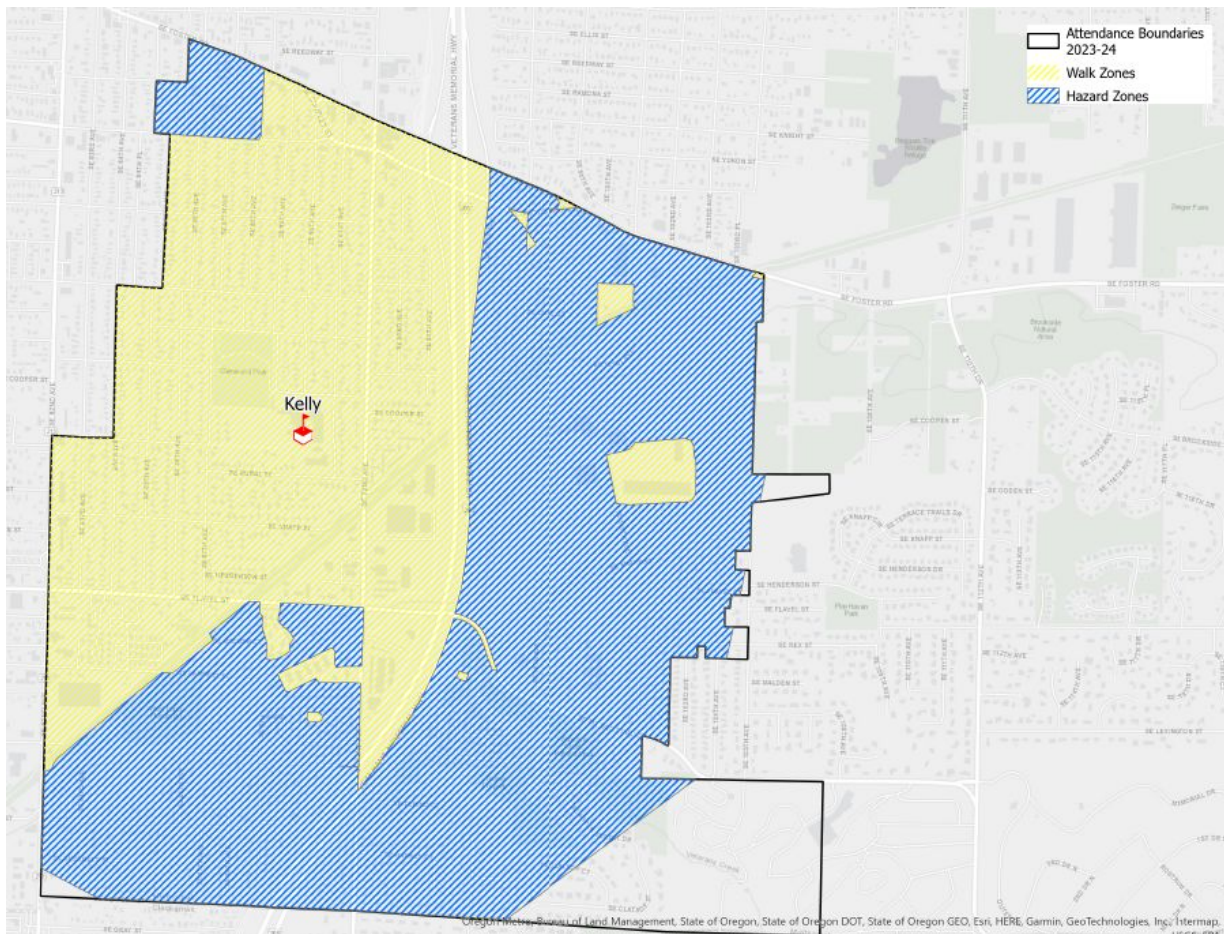
Net Routes due to STPU	Estimated # Students gaining eligibility	Estimated # Students losing eligibility
0	20	0



# Kelly

## STPU Recommendation

No crossing 1-205 or 92nd Ave, limited crossing on springwater trail. Current route allocation can accommodate newly eligible students.



Net Routes due to STPU	Estimated # Students gaining eligibility	Estimated # Students losing eligibility
0	46	0

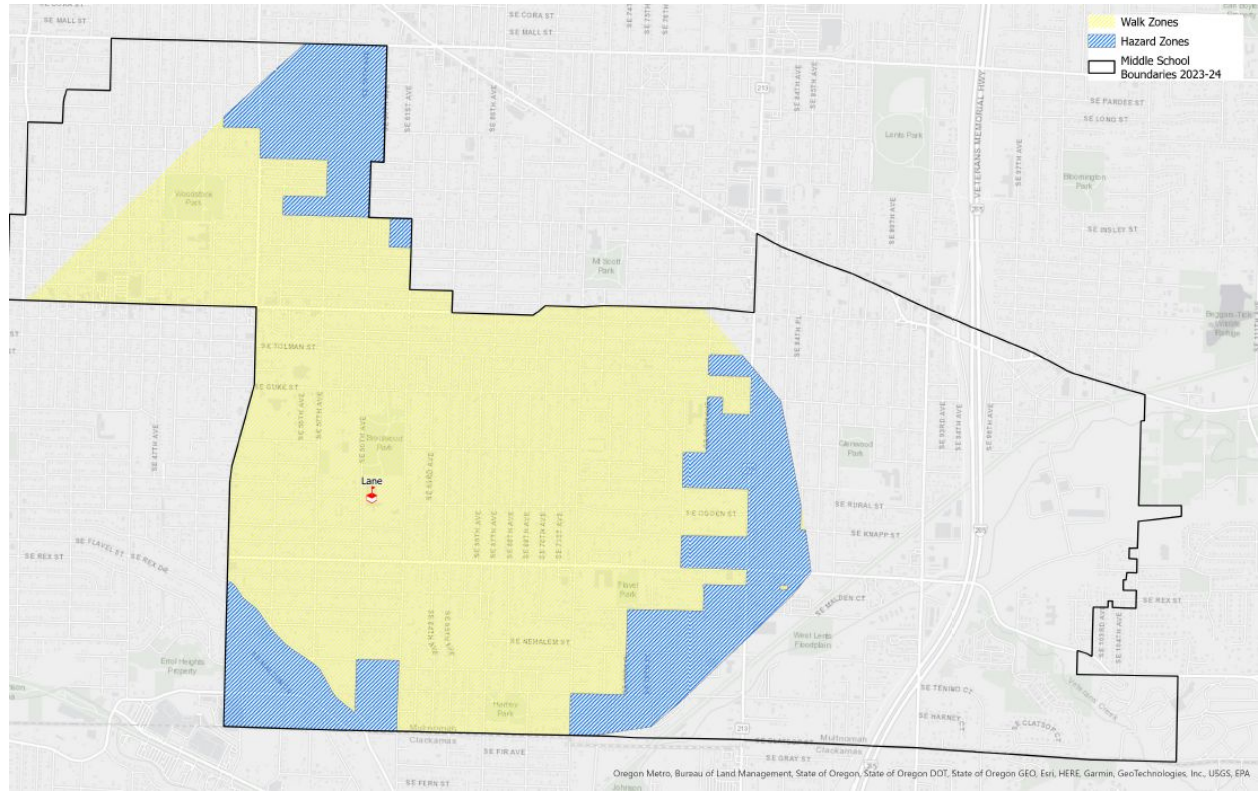


# Lane

## STPU Recommendation

No crossing on 82nd in this area, limited crossing on Woodstock and Flavel. Supplemental transportation provided on outer edges of the walk boundary. Bus will need to be added due to enrollment balancing, but none due to STPU

Net Routes due to STPU	Estimated # Students gaining eligibility	Estimated # Students losing eligibility
0	42	0



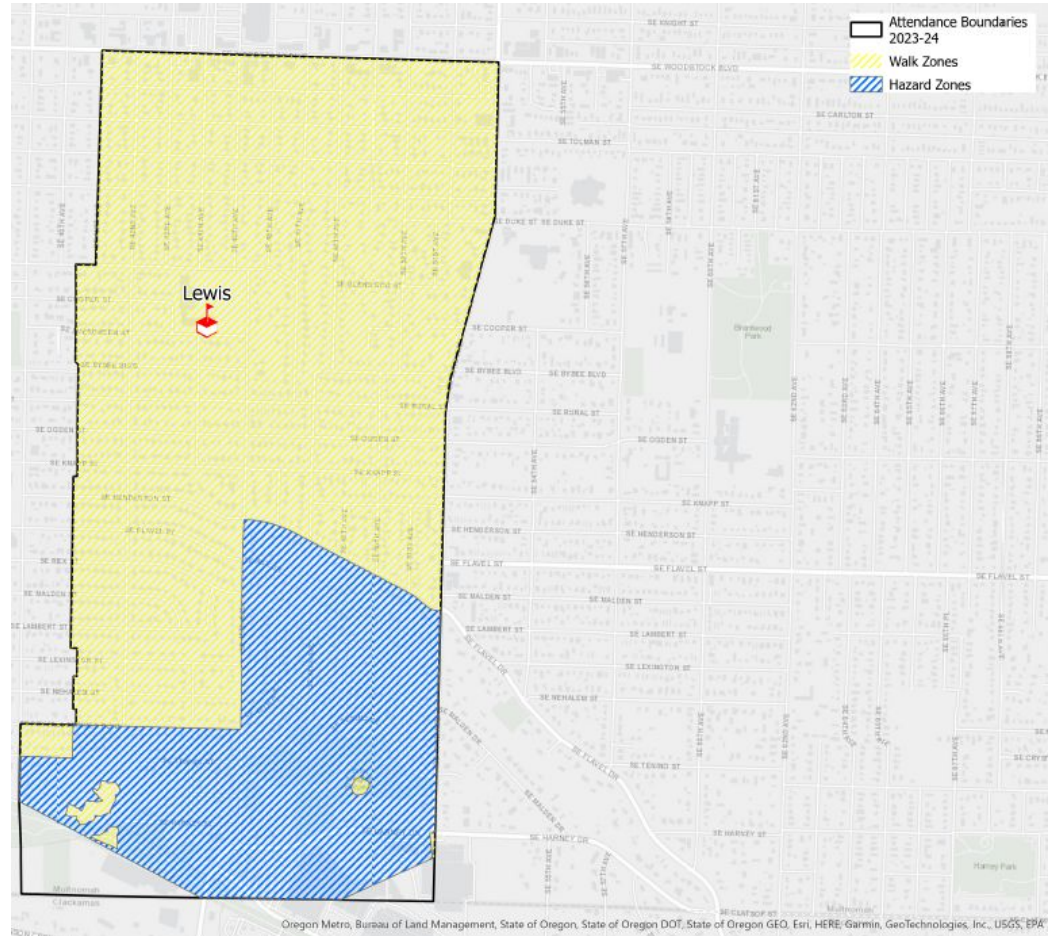
Oregon Metro, Bureau of Land Management, State of Oregon, State of Oregon DDT, State of Oregon GEO, Esri, HERE, Garmin, GeoTechnologies, Inc., USGS, EPA



# Lewis

## STPU Recommendation

Hazard zones added in areas in the southernmost part of the attendance boundary where students would have to walk on portions of 45th ave that doesn't have a sidewalk.



Net Routes due to STPU	Estimated # Students gaining eligibility	Estimated # Students losing eligibility
0	34	0



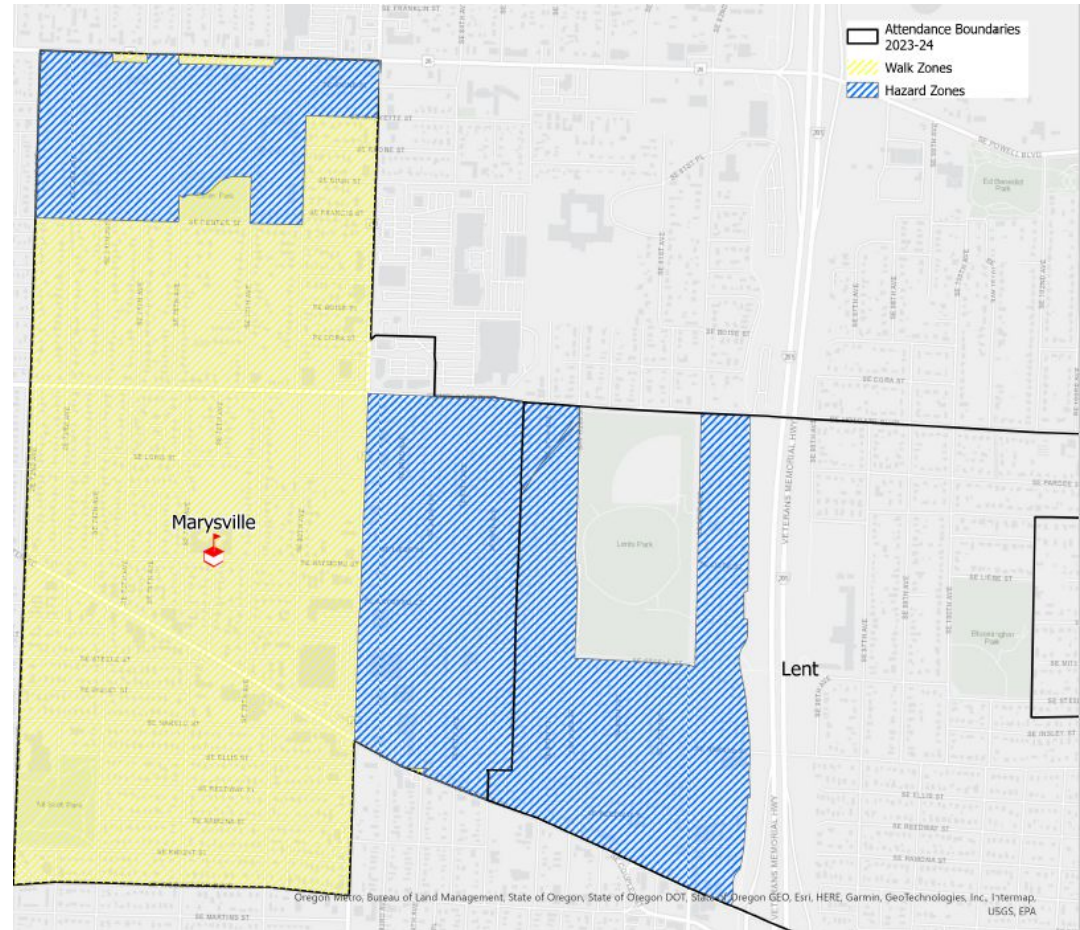
# Marysville

## STPU Recommendation

Entire area east of 82nd is a hazard zone. Small area off of Powell in the northernmost area of the walk boundary. No crossing 82nd, limited crossing on Holgate. No crossing I-205 or 92nd for the expanded boundary that includes Lent. Bus will need to be added due to enrollment balancing, plus one additional for additional ridership due to STPU.

Net Routes due to STPU	Estimated # Students gaining eligibility	Estimated # Students losing eligibility
------------------------	------------------------------------------	-----------------------------------------

1	98	0
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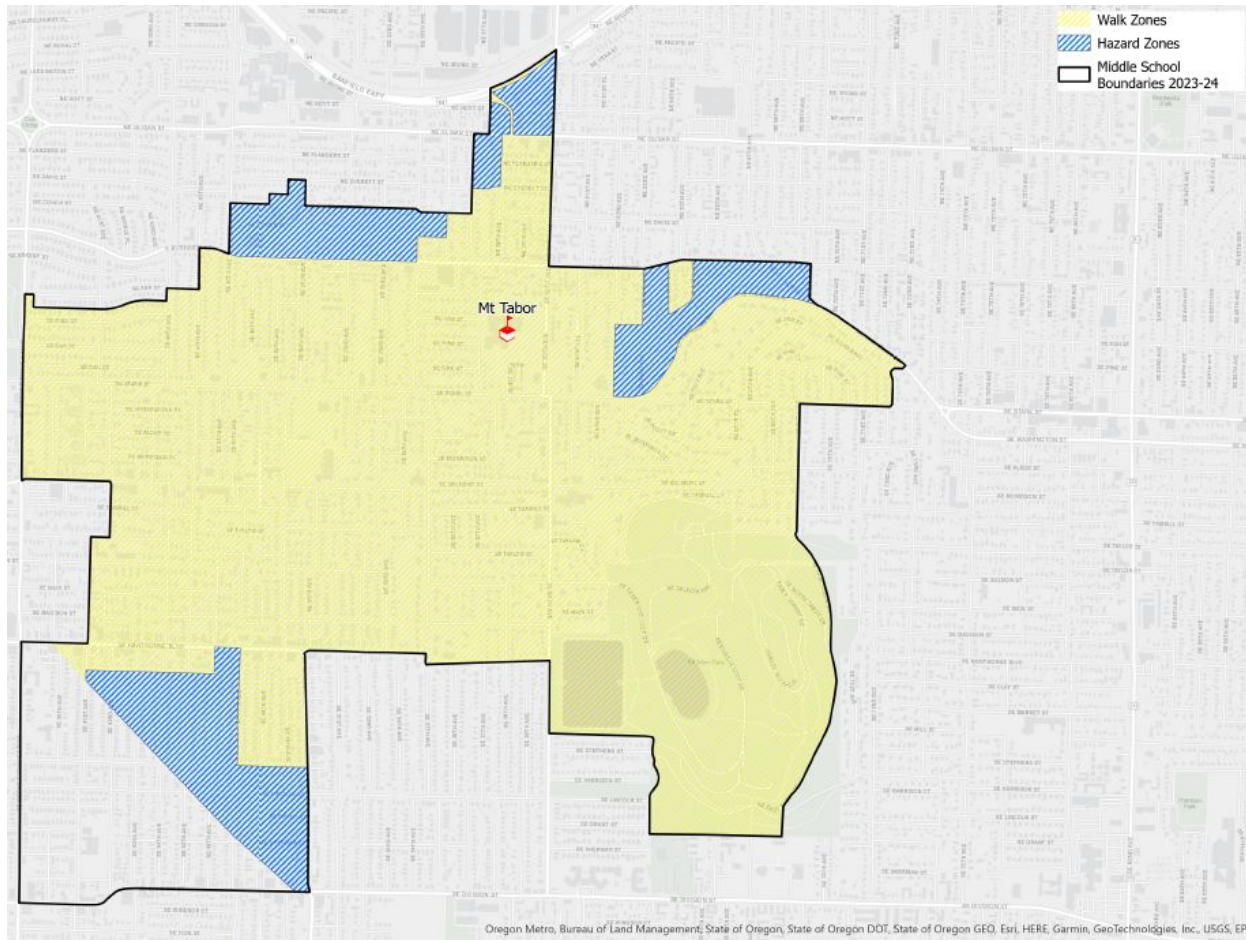


# Mt. Tabor

## STPU Recommendation

Limited crossing on Burnside and no walking on Thorburn. Limited crossing on Hawthorne, current routes have capacity to add students newly eligible for transportation.

Net Routes due to STPU	Estimated # Students gaining eligibility	Estimated # Students losing eligibility
0	38	0



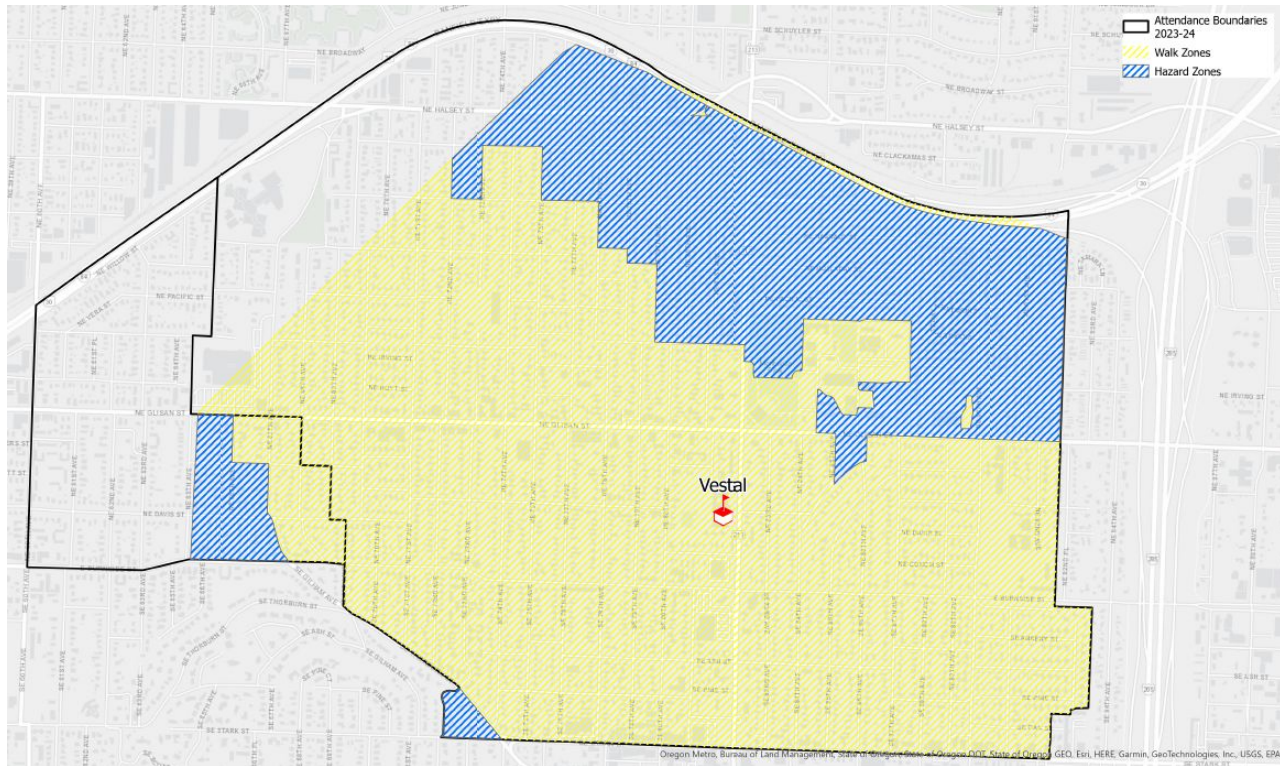


# Vestal

## STPU Recommendation

Limit crossings on Burnside and Glisan. Disallow crossings on 82nd with the exception of School Zone in front of the school. Capacity on the vehicle currently servicing school is low enough to accommodate additional students without adding a route, although the bus will be at capacity with added students.

Net Routes due to STPU	Estimated # Students gaining eligibility	Estimated # Students losing eligibility
0	38	0



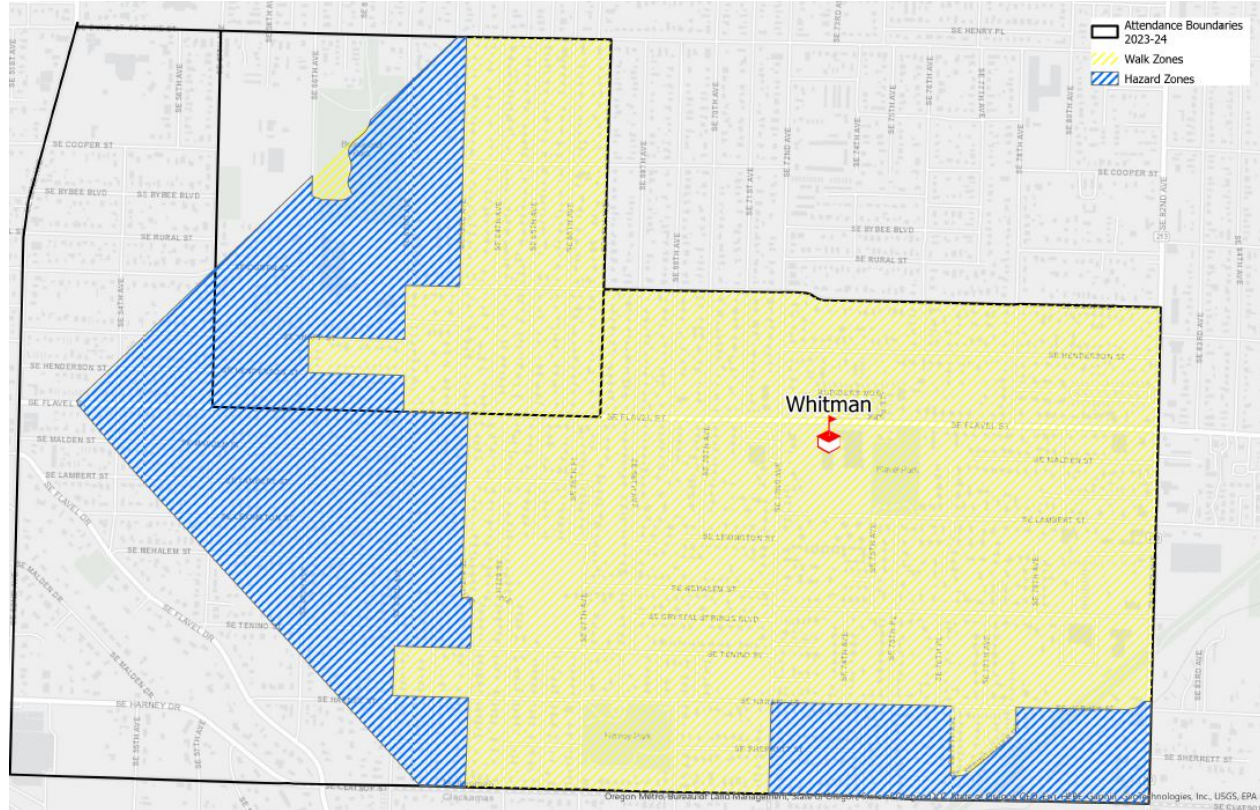


# Whitman

## STPU Recommendation

Many roads without sidewalks in this area limit walkability. Current vehicle has enough capacity to add additional eligible students.

Net Routes due to STPU	Estimated # Students gaining eligibility	Estimated # Students losing eligibility
0	28	0



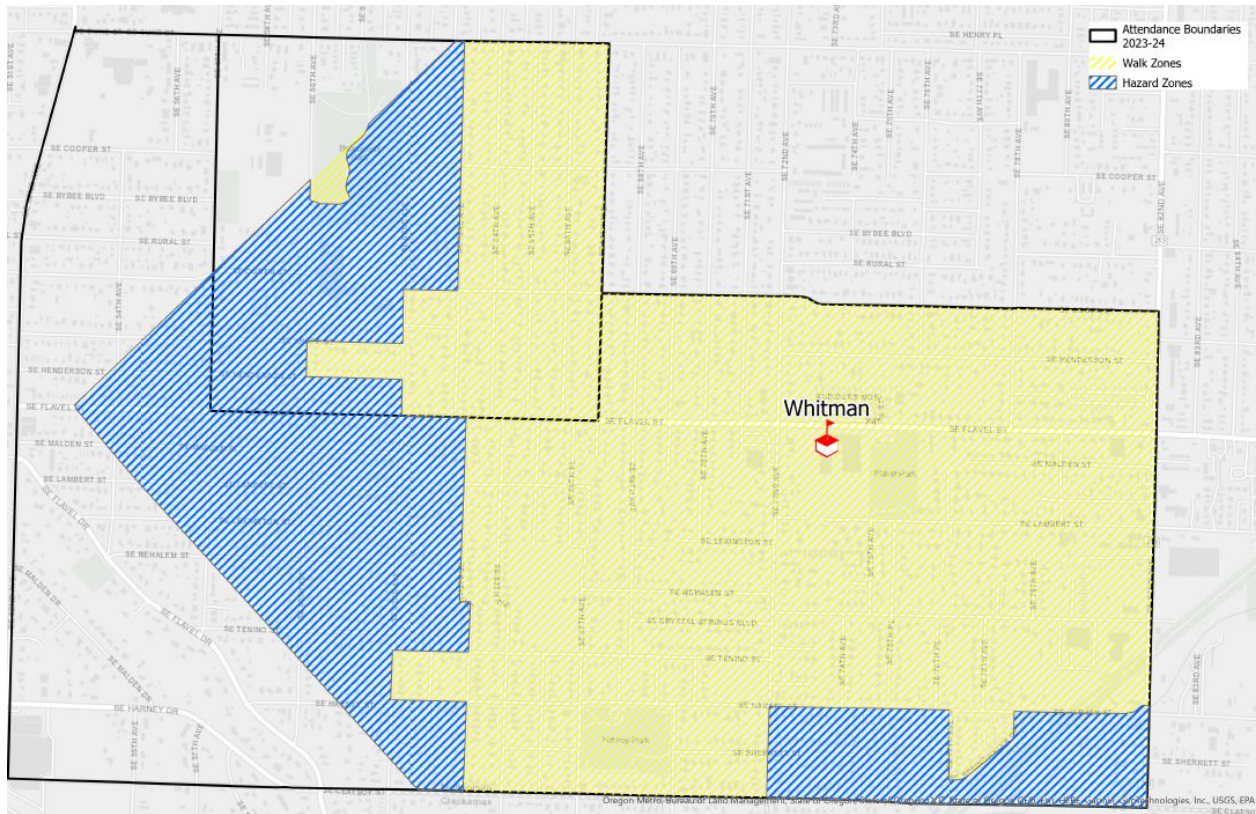


# Woodmere

## STPU Recommendation

No crossing 82nd in this area.  
 Remainder of walk area walkable.  
 Current routes have capacity for additional eligible riders.

Net Routes due to STPU	Estimated # Students gaining eligibility	Estimated # Students losing eligibility
0	31	0





# Phase I schools with no STPU changes

## Lent

No change in supplemental transportation, hazard zone west of I-205 remains. Entire area east of I-205 is walkable. Bus will need to be added for (DLI) program balancing only.

## Woodstock

No change in supplemental transportation. Entire 23/24 attendance boundary is in walk zone. Transportation will be provided for DLI program and transitional service for Program Balancing. No new STPU recommendation.



# Added Routes and Cost

**Estimated # of full routes needed for STPU updates: 1**

**Estimated Cost: \$110,000**

- We do not need to add another route to our fleet for every site that needs a route added, there are plenty of ways we can reallocate our current fleet.
- Doing this phase in conjunction with SE Portland Enrollment Balancing also makes estimates difficult as we will be adding routes due to boundary and programmatic changes that could have capacity to add students who are eligible due to STPU.
- We are still estimating one bus route will need to be added to our fleet to accommodate the STPU recommendations.



# Questions?

# Office of School Modernization - Program

February 2023

## 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	4.62%	8.40%	0.05%	2.64%	0.72%	16.43%	18%	29%	25%	5%	14%
	Prior Report	4.56%	8.03%	0.05%	2.62%	0.67%	15.93%		29%		5%		24%	
12 Month	Current	3.26%	12.67%	0.00%	3.22%	1.12%	20.27%	18%						
	Prior Report	3.20%	9.90%	0.01%	2.96%	1.03%	17.10%							

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	113,022,577	-	113,022,577	-
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	-	3,082,088	97,107	3,246,600	-
RHS Phase IV	-	6,256,244	6,252,016	4,228	6,157,969	-	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>(136,390)</i>
Administration	68,117,563	31,482,611	31,279,128	203,482	31,482,010	-	31,482,611	-
Contingency	25,063,798	211,728	211,728	-	-	-	-	(211,728)
<i>2012 Program Subtotals</i>								<i>(211,728)</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>582,421,114</b>	<b>256,153</b>	<b>582,931,003</b>	<b>(348,118)</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

February 2023

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>155,197,002</b>	141,304,380	13,892,622	100,906,149	48,416,571	<b>156,775,417</b>	1,578,415
Benson Swings	-	<b>13,795,790</b>	13,789,989	5,801	12,168,219	47,508	<b>12,217,374</b>	(1,578,415)
Lincoln HS Repl	187,000,000	<b>242,619,558</b>	242,500,000	119,558	199,999,921	30,070,474	<b>234,607,428</b>	(8,012,130)
Kellogg MS Replace	45,000,000	<b>57,941,414</b>	57,697,500	243,914	57,666,557	204,985	<b>57,941,414</b>	-
McDaniel Mod	146,000,000	<b>202,717,847</b>	199,000,000	3,717,847	199,535,714	920,743	<b>200,661,330</b>	(2,056,518)
Health & Safety	-	<b>155,490,415</b>	135,235,321	20,255,094	138,751,927	2,071,303	<b>155,490,415</b>	-
							<i>2017 Project Subtotals</i>	<i>(10,068,648)</i>
Administration	40,000,000	<b>59,948,787</b>	59,832,096	116,690	43,757,341	6,607,098	<b>55,487,129</b>	(4,461,658)
Contingency	20,000,000	<b>16,279,196</b>	16,279,196	-	-	-	<b>16,279,196</b>	-
Unallocated H&S	150,000,000	<b>22,764,679</b>	22,764,679	-	-	-	<b>22,764,679</b>	-
							<i>2017 Program Subtotals</i>	<i>(4,461,658)</i>
<b>Totals</b>	<b>790,000,000</b>	<b>926,754,687</b>	<b>888,403,161</b>	<b>38,351,526</b>	<b>752,785,828</b>	<b>88,338,681</b>	<b>912,224,381</b>	<b>(14,530,306)</b>

2017 Budget Notes

81% spent

- Funding of the MPG project with 2020 funds is complete. MPG will be shown only in the 2020 Program starting with this update.
- 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.
- 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 forecasting roughly \$8M under budget during Phase 2 of construction.
- 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. As the 2017 Health & Safety projects wind down, OSM is also reviewing to ensure that any Health & Safety funds not needed to complete certain categories of H&S scope get reallocated to other H&S categories, to ensure that the full \$150M dedicated to Health & Safety projects by the 2017 Bond measure is utilized as such.

**Office of School Modernization - Program**  
**February 2023**

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>164,903,890</b>	164,903,890	-	37,447,511	114,788,951	<b>164,903,890</b>	-
Jefferson HS Mod	311,000,000	<b>366,000,000</b>	366,000,000	-	1,264,379	23,440,391	<b>366,000,000</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>76,293,840</b>	76,264,189	29,651	13,046,741	61,792,771	<b>76,293,840</b>	-
Curriculum	53,444,000	<b>53,444,000</b>	53,444,000	-	33,206,650	12,313,703	<b>53,444,000</b>	-
Technology	128,200,000	<b>134,200,000</b>	128,200,000	6,000,000	64,039,036	14,657,770	<b>123,822,806</b>	(10,377,194)
Infra Projects	-	<b>145,927,988</b>	140,870,123	5,057,866	41,287,739	25,686,692	<b>145,927,988</b>	-
							<i>2020 Project Subtotals</i>	<i>(10,377,194)</i>
Administration	63,098,640	<b>61,083,048</b>	61,076,880	6,168	8,093,605	806,173	<b>61,083,048</b>	-
2017 Bond Balance	152,000,000	-	-	-	-	-	-	-
Contingency - OSM	93,257,360	<b>42,553,481</b>	42,553,481	-	-	-	<b>42,553,481</b>	-
Unalloc Proj Funds	241,000,000	<b>96,262,208</b>	96,262,208	-	-	-	<b>96,262,208</b>	-
							<i>2020 Project Subtotals</i>	<i>-</i>
<b>Totals</b>	<b>1,208,000,000</b>	<b>1,242,668,455</b>	<b>1,231,574,770</b>	<b>11,093,685</b>	<b>198,385,661</b>	<b>253,486,451</b>	<b>1,232,291,261</b>	<b>(10,377,194)</b>

**2020 Budget Notes**

16% spent

- Funding of the MPG project with 2020 funds is complete. MPG will be shown only in the 2020 Program starting with this update.
- As discussed at the November 2022 BAC and Facilities & Operations Committee meetings and December 2022 BOE meeting, \$55M has been transferred from 2020 Bond Program Contingency to the Jefferson HS Modernization.
- Curriculum reporting in the Bond Programs Report shows Bond funds only. Non-bond funds related to planned bond scope were tracked in eBuilder for a short period of time only. For a full report of non-Bond funds used for planned bond scope, please see the Curriculum Project Status report included in this February 2023 BAC update.
- OTIS is currently working on refining the Technology forecast. Current forecast shows an underspend but PPS does expect to utilize all bond funds allocated for 2020 Technology.

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>2,752,702,263</b>	<b>2,672,527,193</b>	<b>80,175,071</b>	<b>1,533,592,603</b>	<b>342,081,285</b>	<b>2,727,446,645</b>	<b>(25,255,618)</b>

## Office of School Modernization - Program

February 2023

### 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.
- 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 were shared with the Facilities & Operations Committee in October 2022.

#### 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, 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.
- The Jefferson HS Modernization Comprehensive Plan was approved by the Board of Education on December 13, 2022, and the team is moving forward with schematic design. 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 and early planning. Work on the comprehensive plans and designs for the Cleveland HS Modernization, the Ida B Wells HS Modernization, and Roosevelt Phase 5 will start later this year.

#### Bond Schedule

- The Grant Upper Field Improvement construction is primarily complete, however the scoreboards were delayed due to supply chain issues and are now expected to be installed by end of March.
- Work on the Lincoln High School athletic fields and teen parent center (Phase 2) is underway and on schedule. Benson is on schedule as well.
- 2020 Infrastructure and Capacity projects are moving forward as quickly as possible, but supply chain issues (delays and shortages) have pushed several larger projects to extend to multiple phases. Some summer 2022 projects have split to a second phase in summer 2023 because materials were not available to complete the work prior to start of school in late August. The extent of work necessary for some projects in the 2020 Bond (mechanical and seismic, primarily) will require these projects to be phased over 2-3 years. The Bridger Mechanical replacement project has been pushed back an additional year (to summer 2024) to allow more time for preparation.
- Jefferson HS Modernization will have a very tight schedule during design in order to provide the anticipated amount of time needed for construction. Comprehensive planning and design for the other modernizations are expected to proceed in 2023 per the previously anticipated schedule.



# **School Improvement Bond Update**

## **Bond Accountability Committee**

### **Meeting**

**February 23, 2023**



## Agenda

- **Welcome & Introductions** 5:30 – 5:40 pm
- **Public Comment** 5:40 – 5:45 pm
- **Audit Year 5 Work Plan Presentation** 5:45 – 6:00 pm
- **Program Administration Updates** 6:00 – 6:15 pm
- **2020 Curriculum Project Updates** 6:15 – 6:30 pm
- **2020 Technology Project Updates** 6:30 – 6:45 pm
- **Modernization Project Updates** 6:45 – 8:00 pm
- **Adjourn** 8:00 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.



# Bond Performance Audit Year 5 Work Plan

# PORTLAND PUBLIC SCHOOLS

## 2017 & 2020 BOND PROGRAMS ANNUAL PERFORMANCE AUDIT WORKPLAN FISCAL YEAR 2022/2023

FEBRUARY 23, 2023

Presented by:  
Catherine Brady  
Grace Park

## FIRM BACKGROUND & AUDIT STANDARDS

- Hired in October 2018 to conduct Annual Performance Audits of School Bond Program
- Sjoberg Evashenk Consulting (SEC) Background
- Generally Accepted Government Auditing Standards (GAGAS, “Yellow Book”)
- Approach to Annual Audit Scope Development

# PERFORMANCE AUDIT SCOPE

## ■ Year 5 Performance Audit Scope

- 1. 2017 & 2020 Bond Status**
- 2. Career Learning Equity in Public Purchasing & Contracting**
- 3. 2020 Bond Curriculum and Information Technology**
- 4. Prior Audits Recommendations**

# PERFORMANCE AUDIT SCOPE

## ■ Year 5 Performance Audit Scope

### 1. 2017 & 2020 Bond Status

- What is the delivery status for the remaining 2017 Bond projects and the 2020 Bond projects as of June 30, 2023?

### 2. Career Learning Equity in Public Purchasing & Contracting

- Is PPS meeting its objective to increase the number of young people of color and young women participating in career learning programs in accordance with PPS' Career Learning Equity Administrative Directive 8.50.098?

# PERFORMANCE AUDIT SCOPE

## ■ Year 5 Performance Audit Scope

### 3. 2020 Bond Curriculum and Information Technology “Deep Dive”

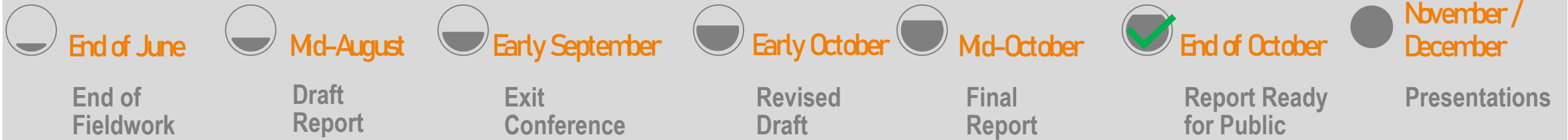
- Do the Office of Teaching and Learning and Office of Technology and Information Services have practices in place to ensure curriculum and technology improvements are delivered as intended by the 2020 Bond?

### 4. Prior Audits Recommendations

- Has OSM/PPS sufficiently addressed prior audit recommendations related to bond activities and implemented appropriate corrective action?

# TIMELINE

## ■ Preliminary Milestones 2023





# Program Administration Updates



Office of School Modernization - Program  
February 2023

### 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	4.62%	8.40%	0.05%	2.64%	0.72%	16.43%	18%	29%	25%	5%	14%
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### BUDGET

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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>(136,390)</i>
Administration	68,117,563	31,482,611	31,279,128	203,482	31,482,010	-	31,482,611	-
Contingency	25,063,798	211,728	211,728	-	-	-	-	(211,728)
<i>2012 Program Subtotals</i>								<i>(211,728)</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>582,421,114</b>	<b>256,153</b>	<b>582,931,003</b>	<b>(348,118)</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  
February 2023

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	155,197,002	141,304,380	13,892,622	100,906,149	48,416,571	156,775,417	1,578,415
Benson Swings	-	13,795,790	13,789,989	5,801	12,168,219	47,508	12,217,374	(1,578,415)
Lincoln HS Repl	187,000,000	242,619,558	242,500,000	119,558	199,999,921	30,070,474	234,607,428	(8,012,130)
Kellogg MS Replace	45,000,000	57,941,414	57,697,500	243,914	57,666,557	204,985	57,941,414	-
McDaniel Mod	146,000,000	202,717,847	199,000,000	3,717,847	199,535,714	920,743	200,661,330	(2,056,518)
Health & Safety	-	155,490,415	135,235,321	20,255,094	138,751,927	2,071,303	155,490,415	-
							<i>2017 Project Subtotals</i>	<i>(10,068,648)</i>
Administration	40,000,000	59,948,787	59,832,096	116,690	43,757,341	6,607,098	55,487,129	(4,461,658)
Contingency	20,000,000	16,279,196	16,279,196	-	-	-	16,279,196	-
Unallocated H&S	150,000,000	22,764,679	22,764,679	-	-	-	22,764,679	-
							<i>2017 Program Subtotals</i>	<i>(4,461,658)</i>
<b>Totals</b>	<b>790,000,000</b>	<b>926,754,687</b>	<b>888,403,161</b>	<b>38,351,526</b>	<b>752,785,828</b>	<b>88,338,681</b>	<b>912,224,381</b>	<b>(14,530,306)</b>

2017 Budget Notes

81% spent

- Funding of the MPG project with 2020 funds is complete. MPG will be shown only in the 2020 Program starting with this update.
- 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.
- 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 forecasting roughly \$8M under budget during Phase 2 of construction.
- 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. As the 2017 Health & Safety projects wind down, OSM is also reviewing to ensure that any Health & Safety funds not needed to complete certain categories of H&S scope get reallocated to other H&S categories, to ensure that the full \$150M dedicated to Health & Safety projects by the 2017 Bond measure is utilized as such.



Office of School Modernization - Program  
February 2023

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	-	164,903,890	164,903,890	-	37,447,511	114,788,951	164,903,890	-
Jefferson HS Mod	311,000,000	366,000,000	366,000,000	-	1,264,379	23,440,391	366,000,000	-
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	76,293,840	76,264,189	29,651	13,046,741	61,792,771	76,293,840	-
Curriculum	53,444,000	53,444,000	53,444,000	-	33,206,650	12,313,703	53,444,000	-
Technology	128,200,000	134,200,000	128,200,000	6,000,000	64,039,036	14,657,770	123,822,806	(10,377,194)
Infra Projects	-	145,927,988	140,870,123	5,057,866	41,287,739	25,686,692	145,927,988	-
							2020 Project Subtotals	(10,377,194)
Administration	63,098,640	61,083,048	61,076,880	6,168	8,093,605	806,173	61,083,048	-
2017 Bond Balance	152,000,000	-	-	-	-	-	-	-
Contingency - OSM	93,257,360	42,553,481	42,553,481	-	-	-	42,553,481	-
Unalloc Proj Funds	241,000,000	96,262,208	96,262,208	-	-	-	96,262,208	-
							2020 Project Subtotals	-
<b>Totals</b>	<b>1,208,000,000</b>	<b>1,242,668,455</b>	<b>1,231,574,770</b>	<b>11,093,685</b>	<b>198,385,661</b>	<b>253,486,451</b>	<b>1,232,291,261</b>	<b>(10,377,194)</b>

2020 Budget Notes

16% spent

- Funding of the MPG project with 2020 funds is complete. MPG will be shown only in the 2020 Program starting with this update.
- As discussed at the November 2022 BAC and Facilities & Operations Committee meetings and December 2022 BOE meeting, \$55M has been transferred from 2020 Bond Program Contingency to the Jefferson HS Modernization.
- Curriculum reporting in the Bond Programs Report shows Bond funds only. Non-bond funds related to planned bond scope were tracked in eBuilder for a short period of time only. For a full report of non-Bond funds used for planned bond scope, please see the Curriculum Project Status report included in this February 2023 BAC update.
- OTIS is currently working on refining the Technology forecast. Current forecast shows an underspend but PPS does expect to utilize all bond funds allocated for 2020 Technology.

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>2,752,702,263</b>	<b>2,672,527,193</b>	<b>80,175,071</b>	<b>1,533,592,603</b>	<b>342,081,285</b>	<b>2,727,446,645</b>	<b>(25,255,618)</b>



# 2020 Curriculum Project Updates

# SCHEDULE HISTORY

BOND LANGUAGE: “Provide comprehensive, culturally relevant, and current curriculum materials across core and supplemental subject areas;”

# ADOPTED MATERIALS

Adoption SY 20/21  
Implementation SY 21/22

K-5 Mathematics  
***iReady Math***

K-3 Foundational Skills  
***Wilson Foundations***

K-5 Spanish Dual Language  
Immersion (DLI)  
***Benchmark  
Adelante/Advance***

6-8 Science  
***SEPUP 3***

Adoption SY 21/22  
Implementation SY 22/23

6-8 Mathematics  
***MidSchoolMath***

9-12 Mathematics  
***McGraw Hill: Illustrative  
Mathematics***

K-5 English Language Arts (ELA)  
***Great Minds: Wit & Wisdom***

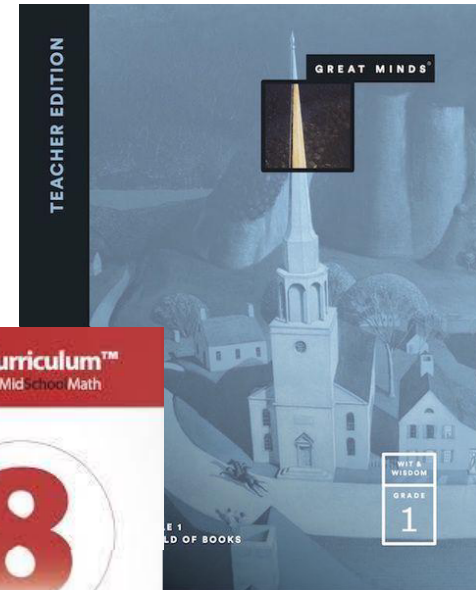
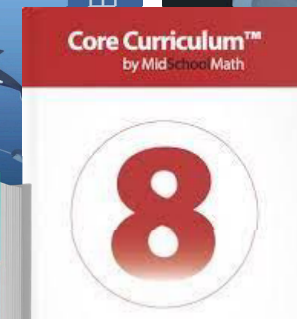
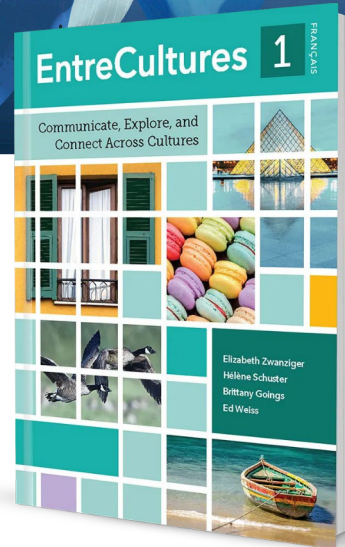
6-12 ELA  
***HMH: Into Literature***

World Language/Continuing DLI  
***Wayside, VHL, Klett, and TrueWay***

Social Emotional Learning (Phase I)  
***CCC: Caring School Communities***

K-5 Violence Prevention  
***Second Step***

9-12 Physical Education  
***Open PE***



PORTLAND PUBLIC SCHOOLS

# ADOPTION SCHEDULE

Adoption SY 22/23 Implementation Yr 23/24	Status	Board Date for Approval (if needed)
K-5 Social Sciences	Field Testing: Inquiry Journey	04/25/23 or 05/09/23
6-8 Social Sciences	Beginning Field Test	05/23/23
9-12 Social Sciences	TBD on Field Testing	05/23/23
K- 12 English as a Second Language (ESL)	Field Testing: Benchmark and VHL	05/23/23
Visual & Performing Arts (VAPA)	Completing Curriculum Portfolio	N/A
Social Emotional Learning (Phase II)	Field Testing: Wayfinder and We do it for the Culture	05/23/23
Health- Nutrition/Mental Health	Beginning Field Test	TBD
K-8 Physical Education	Interviewing Vendors	TBD

# ADOPTION SCHEDULE

Adoption SY 23/24 Implementation SY 24/25	Adoption SY 24/25 Implementation SY 25/26	Adoption SY 25/26 Implementation SY 26/27	Adoption SY 26/27 Implementation SY 27/28	Adoption SY 27/28 Implementation SY 28/29
K-5 Science	Health/PE			
Social Emotional Learning Phase (III)	Planning	Planning	Planning	Planning

Factors to consider:

1. Spacing out large K-5 Adoptions
2. Moving towards ODE Schedule (within 1 or two years of ODE's schedule)
3. Being thoughtful as to what adoptions need to happen sequentially (ELA before ELP)
4. Doing our best to maintain a 6 year schedule
5. 1.5 years for adoption planning/field test



2020 Bond - Curriculum  
February 2023

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>6,592,351</b>	2,142,153	4,450,198	1,399,066	-	6,592,351	-
Unallocated Curriculum Funds	13,950,000	-	-	-	-	-	-	-
Climate Change - 5568	950,000	-	-	-	-	-	-	-
Digital Toolkit - 5683	-	<b>8,611,975</b>	7,300,000	1,311,975	6,162,628	298,707	8,611,975	-
Health - 5566	1,281,170	<b>1,796,573</b>	1,011,450	785,123	249,163	51,444	1,796,573	-
Humanities - 5561	12,825,000	<b>22,466,191</b>	17,430,632	5,035,559	16,959,160	8,662,381	22,466,191	-
Math - 5564	6,460,000	<b>15,817,003</b>	11,058,247	4,758,756	8,332,624	5,689,036	15,817,003	-
Physical Education - 5567	2,518,830	<b>3,132,261</b>	2,534,580	597,681	691,029	48,177	3,132,261	-
Science - 5563	6,729,800	<b>7,194,469</b>	6,788,592	405,877	2,752,679	31,629	7,194,469	-
SEL - 5562	1,054,500	<b>1,251,265</b>	1,054,500	196,765	347,103	15,711	1,251,265	-
Visual & Perf Arts - 5565	5,700,000	<b>4,296,172</b>	4,123,847	172,325	1,171,826	229	4,296,172	-
<b>Totals</b>	<b>53,444,000</b>	<b>71,158,259</b>	<b>53,444,000</b>	<b>17,714,259</b>	<b>38,065,278</b>	<b>14,797,313</b>	<b>71,158,259</b>	-

\* Non-Bond budget, funding, expenditures and encumbrances are tracked outside of eBuilder and reported by the Office of Teaching and Learning.

## August 2022 to February 2023

- Distributed materials for all newly adopted curriculum of SY 22/23.
- Ongoing professional development on newly adopted curricula through monthly cadre sessions and embedded professional development days.
- Launch of new adoptions, formation of committees and decisions on field testing materials:
  - K-12 Social Sciences
  - K-12 English Language Development
  - K-12 Visual and Performing Arts
  - Continuing Health/Physical Education
  - Continuing Social Emotional Learning

## 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.
  - Unassigned Teacher on Special Assignment positions (TOSAs)
- Supply chain issues.



# 2020 Technology Project Updates



2020 Bond - Technology  
February 2023

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
<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>29,745,766</b>	27,480,989	2,264,778	1,607,345	3,224,780	<b>6,737,773</b>	(23,007,993)
Classroom Modernization - 5516	24,780,325	<b>23,793,677</b>	23,743,677	50,000	11,339,025	1,351,077	<b>31,508,751</b>	7,715,074
Device Replacement - 5515	31,006,443	<b>38,719,161</b>	38,683,834	35,327	37,275,767	1,440,201	<b>43,817,894</b>	5,098,732
ERP Replacement Planning - 5518	11,107,080	<b>3,504,000</b>	250,000	3,254,000	971,950	2,283,225	<b>5,988,175</b>	2,484,175
Infrastructure & Security - 5517	38,041,500	<b>38,437,395</b>	38,041,500	395,895	12,844,949	6,358,486	<b>35,770,213</b>	(2,667,182)
<b>Totals</b>	<b>128,200,000</b>	<b>134,200,000</b>	<b>128,200,000</b>	<b>6,000,000</b>	<b>64,039,036</b>	<b>14,657,770</b>	<b>123,822,806</b>	<b>(10,377,194)</b>

### SCHEDULE

	2022				2023				2024				2025			
	Q1	Q2	Q3	Q4	Q1	Q2	Q3	Q4	Q1	Q2	Q3	Q4	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



# Modernization Project Updates



# Definitions

## STATUS DEFINITIONS

	As Planned	Caution	Impacts
Budget	Pre-50% const: > 10% Project Contingency	Pre-50% const: 0% - 10% Project Contingency	Pre-50% const: < 0% Project Contingency
	Post-50% const: > 5% Project Contingency	Post-50% const: 0% - 5% Project Contingency	Post-50% const: < 0% Project Contingency
Equity	certified business participation > 18% <b>and</b> workforce equity > 20%	certified business participation 10% - 18% <b>or</b> workforce equity 10% - 20%	certified business participation < 10% or workforce equity < 10%
Schedule	0 or less weeks delay to SC	0+ up to 4 weeks delay to SC	greater than 4 weeks delay to SC
Overall	budget, equity and schedule are all green	at least one category is yellow	at least one category is red

## EQUITY CATEGORIES

MBE = Minority-owned Business Enterprise

WBE = Woman-owned Business Enterprise

SDVBE = Service Disabled Veteran-owned Business Enterprise

ESB = Emerging Small Business

N-C = Non-Certified, counted for credit from a Certified Business that "graduated" out or did not reapply for certification



# Lincoln HS Replacement



**Lincoln HS Modernization**  
February 2023

PPS Team Lead: Erik Gerding  
Design: Bora Architects  
Construction: Hoffman Pacificmark

## STATUS AT A GLANCE

Legend:

- As planned: no concerns
- Caution: requires attention
- Impacts: impacts occurring

	As Planned	Caution	Impacts
Budget	X		
Equity	X		
Schedule	X		
Overall	X		

## BUDGET

BUDGET		FUNDING		PROGRESS		FORECAST		CONTINGENCY IN CONTEXT	
Original Budget	Current Budget	Bond Funds	Other Funds	Actuals to Date	Additional Encumbered	Estimate At Completion	Over/Under	Work Complete / %	Contingency Remain / %
242,500,000	<b>242,619,558</b>	242,500,000	119,558	199,999,921	30,070,474	<b>234,607,428</b>	(8,012,130)	85%	5.29%

## EQUITY

*Percent of payments made to Certified owned businesses, percent of labor hours of apprenticeable trades; cumulative*

	MBE	WBE	SDVBE	ESB	N-C	TOTAL	goal	MIN	goal	FEM	goal	APPR	req
Consultants	0.97%	5.59%	0.00%	2.38%	0.00%	<b>8.95%</b>	18%						
Contractors	2.54%	14.36%	0.00%	1.04%	1.54%	<b>19.47%</b>	18%						
Overall	2.39%	13.51%	0.00%	1.17%	1.39%	<b>18.45%</b>	18%						
Workforce								40%	25%	4%	14%	<b>22%</b>	20%

## SCHEDULE

NEXT MILESTONE:

Substantial Completion ▼

On Track?

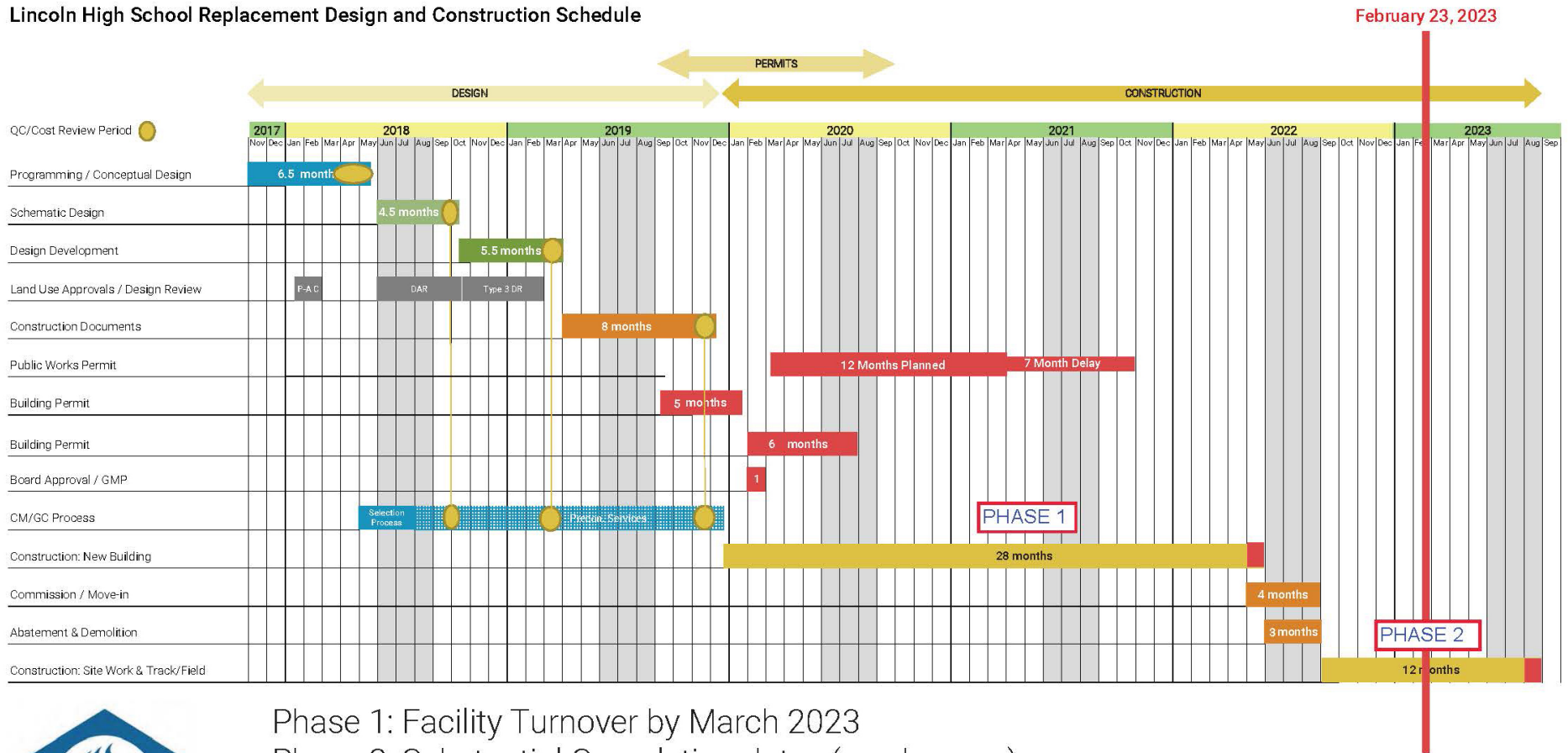
Yes ▼

PROJECT PHASE	2020			2021			2022			2023		
Planning												
Design												
Construction										★		
School Opening(s)												

- Baseline
- Planning
- Design
- Construction
- School Opening



## Lincoln High School Replacement Design and Construction Schedule



Phase 1: Facility Turnover by March 2023

Phase 2: Substantial Completion dates (no changes):

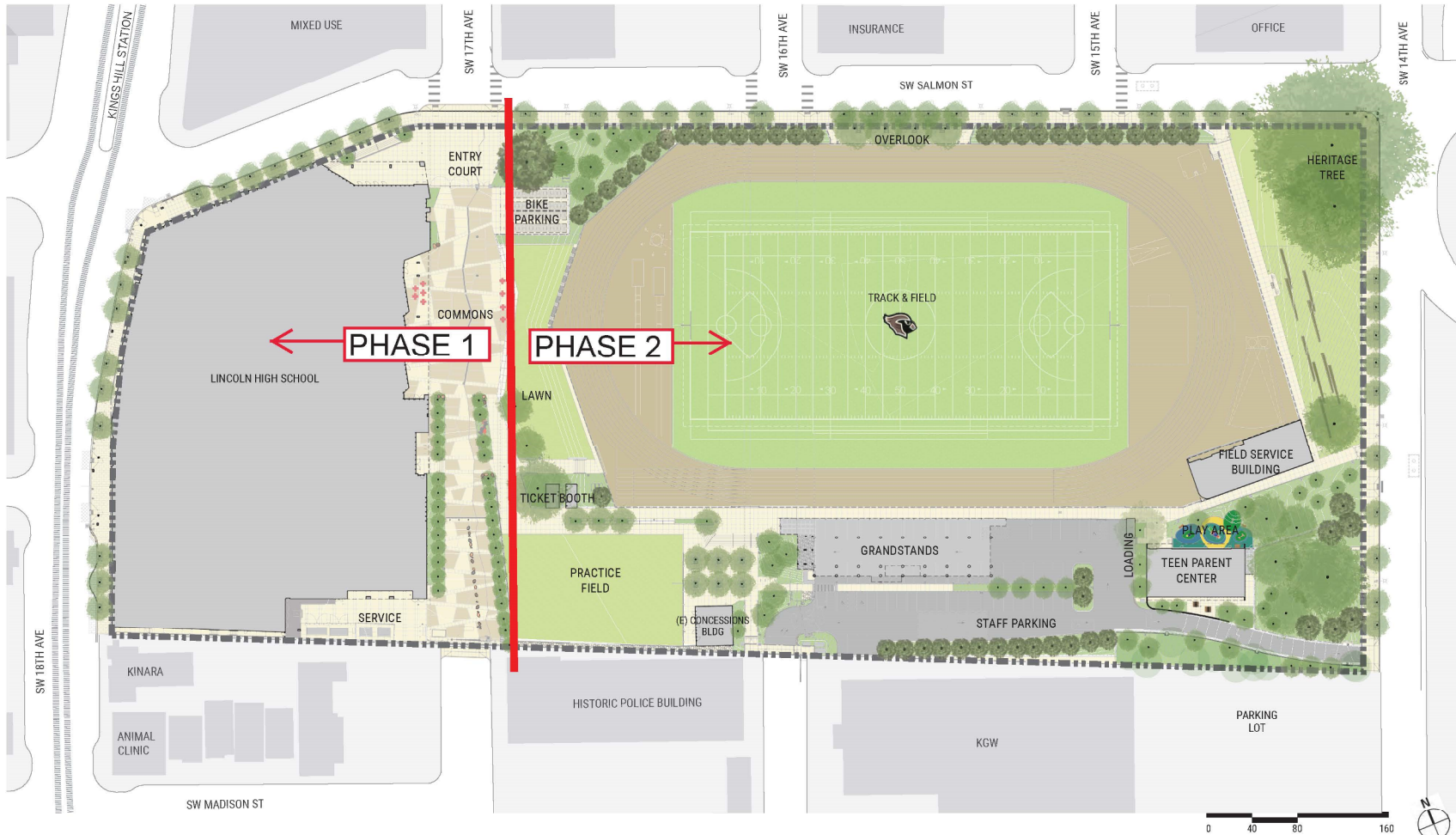
- Track & Field, Concessions Building, Parking Lot, Site Work- July 17, 2023.
- Teen Parent Center & Field Service Building - August 2, 2023.
- Grand Opening September 2023



# Lincoln HS Modernization



Site Plan



LINCOLN HIGH SCHOOL ACCESSORY BUILDINGS DR, OCTOBER 2021

Mayer/Reed BORA



AERIAL PHOTO – Phase 1 - September 2022

February 2023



# Lincoln HS Modernization



AERIAL PHOTO – February 2023

February 2023



# Lincoln HS Modernization



View from main building 02-15-2023

February 2023



Concrete crushing of slabs and foundations from the old building. The project created over 15,000 yards of crushed rock which is enough to cover three football fields three feet deep. The material is used on site for back fill and base rock. Leftover material is exported to other construction projects in the area.



Teen Parent Center Framing

February 2023





# Lincoln HS Modernization





# Lincoln HS Modernization



Phase 2 Site Work

February 2023



# Benson HS Modernization



Benson HS / Benson Swing Sites / MPG  
February 2023

PPS Team Lead: Armand Milazzo  
Design: Bassetti Architects  
Construction: Andersen Construction Co.

## STATUS AT A GLANCE

Legend:

- As planned: no concerns
- Caution: requires attention
- Impacts: impacts occurring

	As Planned	Caution	Impacts
Budget		X	
Equity	X		
Schedule	X		
Overall		X	

## BUDGET

	BUDGET		FUNDING		PROGRESS		FORECAST		CONTINGENCY	
	Original Budget	Current Budget	Bond Funds	Other Funds	Actuals To Date	Additional Encumbered	Estimate At Completion	Over/Under	Work Compl	Cont Remain
Benson HS	202,000,000	<b>320,100,892</b>	306,208,270	13,892,622	138,353,660	163,205,522	<b>321,673,507</b>	1,572,615	55%	3%
Swing Sites	-	<b>13,789,989</b>	13,789,989	5,801	12,168,219	47,508	<b>12,217,374</b>	(1,572,615)	100%	11%
MPG Building	-	<b>76,293,840</b>	76,264,189	29,651	13,046,741	61,792,771	<b>76,293,840</b>	-	10%	6%
<b>Benson Totals</b>	<b>202,000,000</b>	<b>410,184,721</b>	<b>396,262,448</b>	<b>13,928,074</b>	<b>163,568,620</b>	<b>225,045,801</b>	<b>410,184,721</b>	-		

## EQUITY

Percent of payments made to Certified owned businesses, percent of labor hours of apprenticeable trades; cumulative

	MBE	WBE	SDVBE	ESB	N-C	TOTAL	goal	MIN	goal	FEM	goal	APPR	req
Consultants	5.09%	8.54%	0.00%	1.40%	0.00%	15.04%	18%						
Contractors	4.47%	9.18%	0.00%	4.27%	0.57%	18.50%	18%						
Overall	4.62%	9.03%	0.00%	3.59%	0.44%	17.67%	18%						
Workforce								37%	25%	7%	14%	22%	20%

## SCHEDULE

NEXT MILESTONE: Substantial Completion

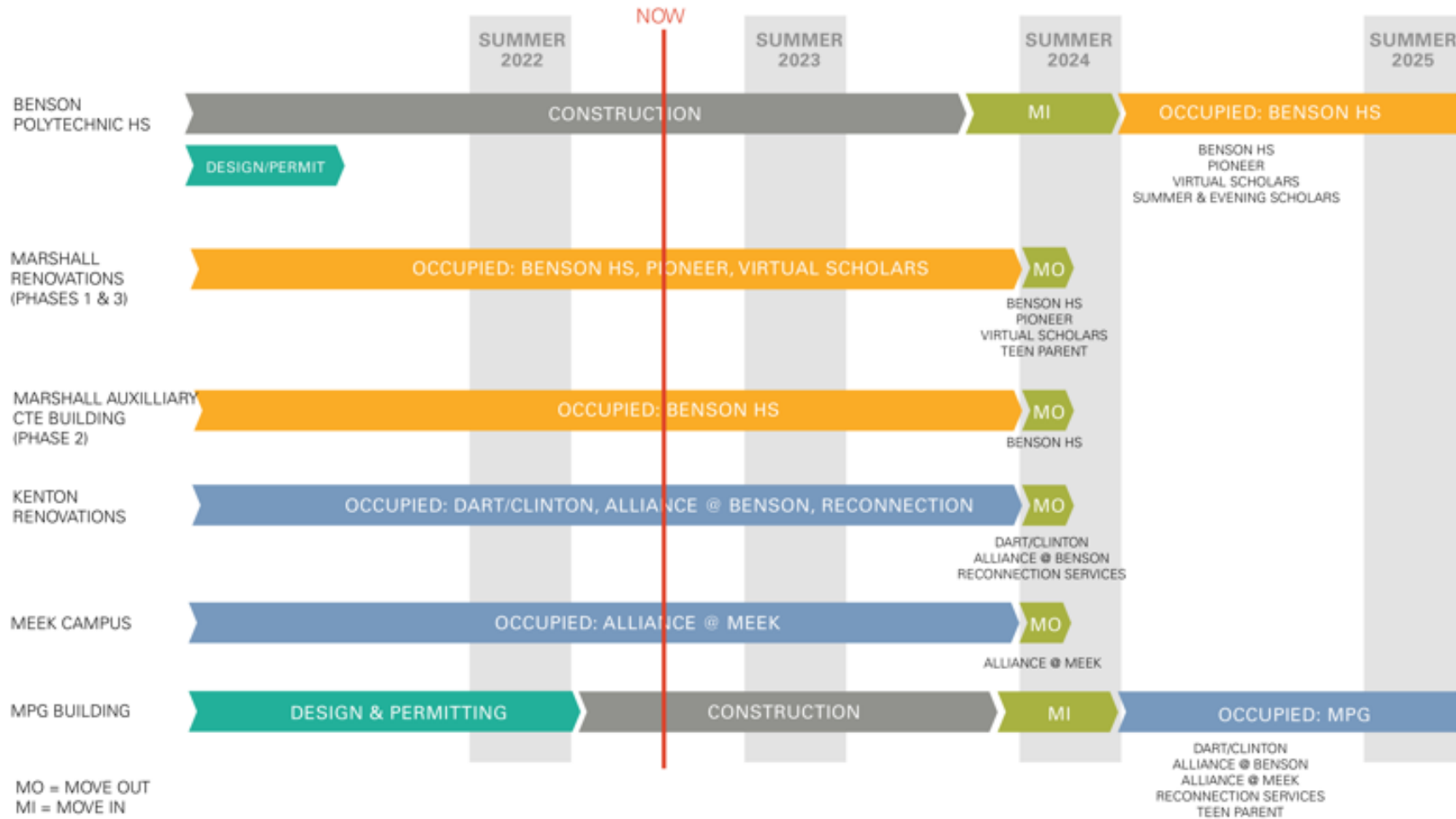
On Track? Yes

PROJECT	2021			2022			2023			2024		
	Benson HS Modernization											
Benson Swing Sites												
MPG Building												

Baseline
 Planning
  Design
  Construction
  School Opening



## BENSON & MPG SITES





## 1930 Historic Auditorium rehabilitation & renovation

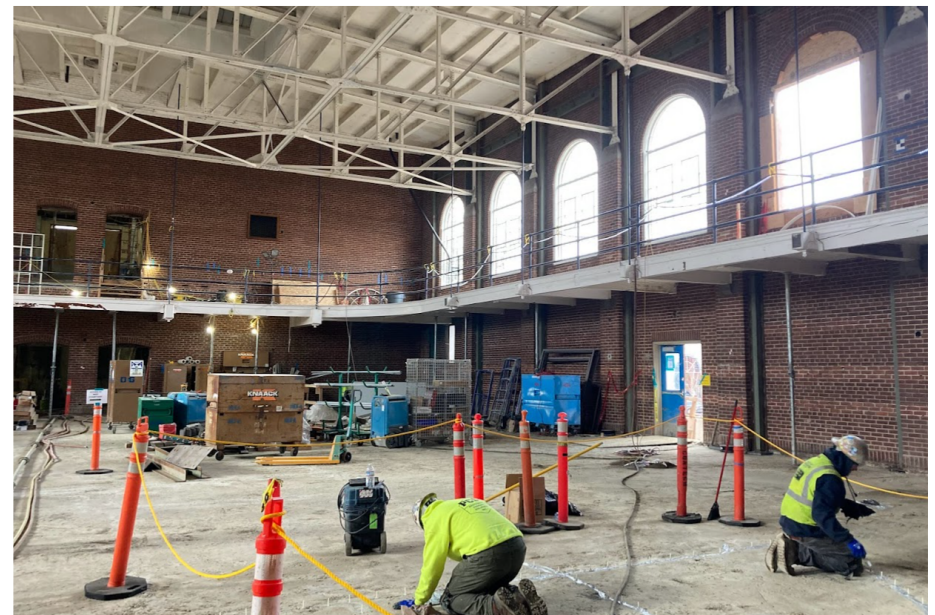




# Benson Tech HS Modernization



1964 Main Gym & 1925 Original Gym structural retrofit & renovation





New Commons, Kitchen/Servery Building F, New Building B (Health Occupations, Library and Counseling) & New Building H (Automotive, Digital Media, Computer Engineering)





**New North shop wing / Building C:**  
new stair, corridor & chemistry room



February 2023



## Student Engagement

- Student Construction Site Visits- Manufacturing & Digital Media



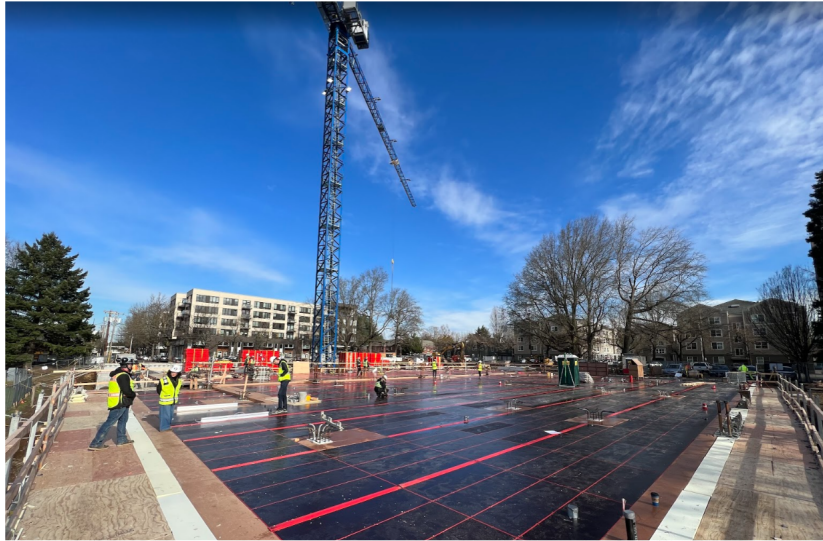
February 2023



## Student Engagement

- **Student Construction Site Visits-** CTE Electric student site visit & Benson student engagement designed and partial constructed tiny house with Bassetti Architects & Andersen Construction







# Multiple Pathways to Graduation Building





# Jefferson HS Modernization



Jefferson HS Modernization  
February 2023

PPS Team Leads: Steve Effros, Kiesha Locklear, Ayana Horn  
Design: BORA Architects, Lever Architecture  
Construction:

## STATUS AT A GLANCE

Legend:

	As planned: no concerns
	Caution: requires attention
	Impacts: impacts occurring

	As Planned	Caution	Impacts
Budget	X		
Equity*		X	
Schedule	X		
Overall	X		

## BUDGET

BUDGET		FUNDING		PROGRESS		FORECAST		CONTINGENCY IN CONTEXT	
Original Budget	Current Budget	Bond Funds	Other Funds	Actuals to Date	Additional Encumbered	Estimate At Completion	Over/Under	Work Complete / %	Contingency Remain / %
311,000,000	<b>366,000,000</b>	366,000,000	-	1,264,379	23,440,391	<b>366,000,000</b>	-	0%	15.00%

## EQUITY

*Percent of payments made to Certified owned businesses, percent of labor hours of apprenticeable trades; cumulative*

	MBE	WBE	SDVBE	ESB	N-C	TOTAL	goal	MIN	goal	FEM	goal	APPR	req
Consultants	5.50%	3.16%	0.00%	0.00%	0.00%	<b>8.66%</b>	18%						
Contractors*	0.00%	0.00%	0.00%	0.00%	0.00%	<b>0.00%</b>	18%						
Overall	5.50%	3.16%	0.00%	0.00%	0.00%	<b>8.66%</b>	18%						
Workforce*								0%	25%	0%	14%	<b>0%</b>	20%

\* Construction payments have not yet been made.

## SCHEDULE

NEXT MILESTONE: 100% SD

On Track? Yes

PROJECT PHASE	2023			2024			2025			2026		
Planning												
Design	★											
Construction												
School Opening(s)												Phase I

Baseline	Planning	Design	Construction	School Opening
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## Project Timeline

Project Community and Stakeholder Engagement :

Open Houses, Town Halls, workshops, engagement and community events, community associations, focus groups, 1:1s, stakeholder reviews, BOE meetings, BAC meetings



DESIGN JUSTICE BASED COMMUNITY ENGAGEMENT

COMMUNITY DESIGN ORGANIZERS





## Community Engagement

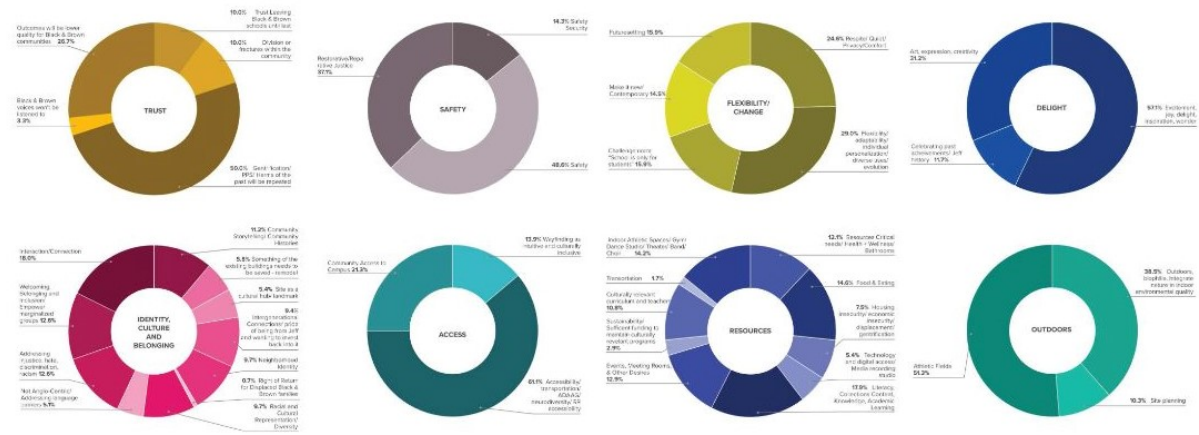
# WHAT WE'VE BEEN HEARING

## Narrative Themes

<b>Trust</b>		Recognizing the ways that BIPOC communities have been impacted by systematic racism, and how that has manifested within district policies, procedures, and spaces over many generations, it is important for this project team to understand why people feel mistrustful that this process will result in more just outcomes.	<b>Flexibility, Change</b>		Flexibility is critical for adapting to dynamic day-to-day and seasonal needs that schools must accommodate but also to future needs that may be unpredictable at present. Additionally, this category incorporates themes around full replacement scenarios, and more general desire for new and contemporary building conditions.
<b>Identity, Culture, Belonging</b>		Responses highlight Jeff as a cultural institution for Black and brown communities and the need to make it a welcoming, resourceful and empowering space for diverse racial, ethnic and other affinity groups. They also reflected the strength communities find in interaction and collective support among diverse communities.	<b>Resources</b>		Schools should provide critical educational and socio-cultural resources especially to those who experience systemic disinvestment including implications related to housing, food, economics, technology, as well as specific educational pathways as resources. This also includes community gathering space as a resource.
<b>Safety, Security, Wellness</b>		Safety consists of reducing incidents of physical and emotional harm including public health concerns such as COVID precautions. Security refers to visibility and access control with an emphasis on procedures for public safety professionals and staff. It also addresses considerations around mental health and wellbeing.	<b>Delight</b>		The hopes for communities to find wonder and inspiration within the Jeff's spaces, resources, programming, art and interactions within the school. This category captures the possibilities for innovation, creativity, artistry and engagement surrounding the project.
<b>Access</b>		Accessibility is critical for diverse communities not limited to ADAAG (The Guide to Americans with Disabilities Act Accessibility Guidelines). This category refers to inclusive design for universal access for diverse body types, neurodiversity, gender accessibility, financial standing, and wayfinding.	<b>Embracing the Outdoors</b>		Responses in this narrative category relate to site planning and connections to nature, light and air. It also includes discussion of athletics fields. Beyond a physical connection to the outdoors, this includes indoor environmental quality issues such as fresh air, air quality, natural daylighting, biophilia and views.

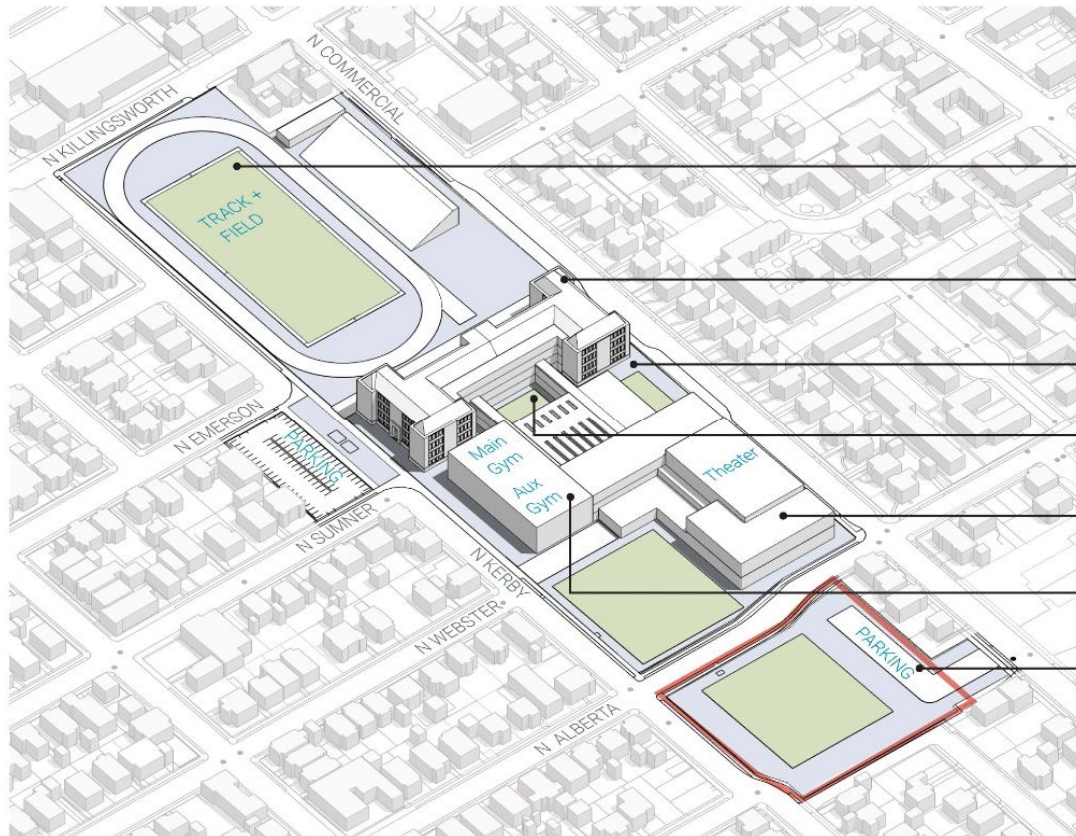
Comments are synthesized and grouped by narrative themes. Themes are diverse in point of view and matter but tell a story about communities, principles and values, for example:

- Who is most impacted by the project
- Who is most vulnerable in the communities associated with the project
- What the prevalent concerns of these communities may be
- Existing operational considerations and experiences
- Outstanding questions and concerns about the project
- Potential opportunities that communities, as the people who have the most insight about the underlying conditions of the project site, are excited about.





## Comprehensive Plan / Responding to Community Engagement



Engagement feedback incorporated into overall planning approach:

Keeping and improving the beloved blue Track & Field also minimizes disruptions to students and families during construction.

Renovating 1909 provides historical continuity and irreplaceable value as a cultural and community hub

Entry plaza with porch and partnership spaces offer amenities for communities and neighbors

Central courtyard provide access to outdoors and covered gathering opportunities

State-of-the-Art performing arts wing and theater is prominent with street presence

New state-of-the-Art athletic facilities

Additional parking reflect staff and student feedback



## Design Advisory Group

### JEFFERSON HIGH SCHOOL MODERNIZATION

# DESIGN ADVISORY GROUP

#### WHAT IS THE JEFFERSON HS DESIGN ADVISORY GROUP (DAG)?

THE **DAG** IS A GROUP OF JEFFERSON HIGH SCHOOL **COMMUNITY MEMBERS WHO COMMIT** TO ADVISE THE JEFFERSON HS MODERNIZATION PROJECT TEAM DURING THE DESIGN PHASES OF THE PROJECT. THIS INCLUDES, BUT IS NOT LIMITED TO, STUDENTS, TEACHERS, ALUMNI, SCHOOL ADMINISTRATION, PPS STAFF, SCHOOL & COMMUNITY PARTNERS, LOCAL BUSINESS OWNERS, AND NEIGHBORHOOD RESIDENTS.

#### HOW WILL THE DAG ADVISE THE JEFFERSON HS PROJECT TEAM?

THE DAG **MEETS REGULARLY** WITH THE PROJECT TEAM TO **DISCUSS AND PROVIDE FEEDBACK ON VARIOUS DESIGN IDEAS** BROUGHT BY THE DESIGN TEAM. THIS COULD INCLUDE INFORMATION SUCH AS FLOOR PLAN LAYOUT, LANDSCAPE DESIGN, SIGNAGE AND WAYFINDING DESIGN, WALL GRAPHIC DESIGN/ART INSTALLATIONS, FURNITURE CHOICES, CONSTRUCTION MATERIAL CHOICES, OR PAINT COLORS.

#### HOW DO WE PARTICIPATE?

THERE WILL BE A SERIES DAG OPEN HOUSE AND INTERACTIVE WORKSHOP MEETINGS THAT ARE OPEN TO THE PUBLIC:

#### THURSDAYS, 5:00PM - 7:00PM IN THE JHS CAFETERIA

FEBRUARY 16th, 2023	OPEN HOUSE
MARCH 23rd, 2023	OPEN HOUSE
MAY 4th, 2023	WORKSHOP
JUNE 15th, 2023	OPEN HOUSE
SEPTEMBER 7th, 2023	OPEN HOUSE
OCTOBER 19th, 2023	WORKSHOP
NOVEMBER 30th, 2023	OPEN HOUSE
JANUARY 11th, 2024	OPEN HOUSE

**MARCH 14th 2024: FINAL DESIGN REVIEW**

**PLEASE BE ON THE LOOKOUT FOR EMAIL ANNOUNCEMENTS!**

#### WHERE DO WE FIND MORE INFO?

PLEASE VISIT OUR WEBSITE OR SEND US AN EMAIL WITH QUESTIONS OR TO BE ADDED TO OUR MAILING LIST.

[WWW.PPS.NET/JEFFERSONBOND](http://WWW.PPS.NET/JEFFERSONBOND)



EMAIL: [JHSBOND@PPS.NET](mailto:JHSBOND@PPS.NET)

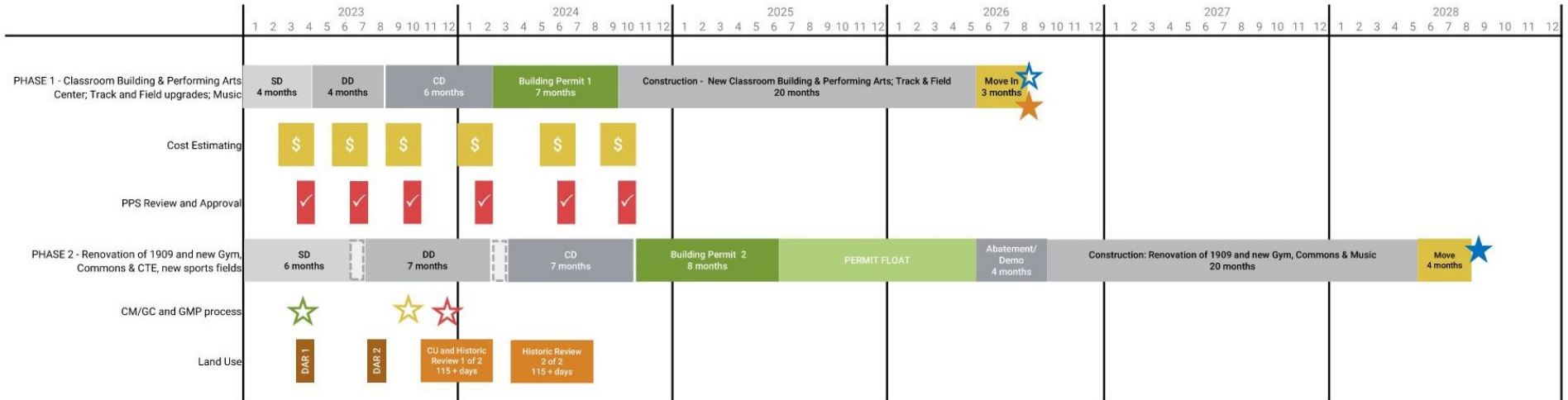
## GO DEMOS!



**ALL VOICES ARE WELCOME!**



## Design & Construction Schedule



**Cost Estimates**

1 Package 1 65% SD	Package 2 45% SD
2 Package 1 50% DD	Package 2 90% SD
3 Package 1 10% CD/GMP	Package 2 25% DD
4	Package 2 80% DD
5	Package 2 30% CD
6	Package 2 80% CD



# Adjourn

**Next meeting:**

**May 31, 2023, 5:30-8:00pm  
location TBD (in person)**

2017 Health & Safety Funding Allocation

February 2023

	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>7,355,931</b>	<b>3,684,069</b>	<b>Asbestos</b>
<i>Project Name: 2017 Bond Program</i>	2,504,487	-	2,504,487	2,504,487
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	57,417	15,073	
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	263,213	181,888	81,325	
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	490,119	394,094	
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	133,787	99,623	
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	169,059	68,871	
Project Name: Terwilliger - 2022 Phase III Asbestos Abatement - Bond - 5985 - FY22	250,000	163,516	86,484	
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	348,043	221,922	
Project Name: Woodstock - 2020 Asbestos Abatement-Bond - 5368 - FY20	192,408	192,408	-	
Project Name: Woodstock - 2022 Asbestos Abatement - Bond - 5952 - FY22	409,200	271,893	137,307	
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>

2017 Health & Safety Funding Allocation

February 2023

	Total Funds	Spent To Date	Balance	Unalloc Balance
<i>Project Name: 2017 Bond Program</i>	1,768,850	-	1,768,850	1,768,850
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>3,185,509</b>	<b>11,439,115</b>	<b>Lead Paint</b>
<i>Project Name: 2017 Bond Program</i>	3,790,587	-	3,790,587	3,790,587
Project Name: Multiple Sites - Lead Paint Abatement - BOND - 5466	4,000,000	1,752,448	2,247,552	
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	587,515	912,485	
Project Name: Multiple Sites - Lead Painting-Bond-Fulcrum - 5551	1,500,000	-	1,500,000	
Project Name: Multiple Sites - Lead Painting-Bond-PacIndPaint - 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>	877,322	-	877,322	877,322
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>49,349,409</b>	<b>3,637,025</b>	<b>Roof</b>
<i>Project Name: 2017 Bond Program</i>	2,913,452	-	2,913,452	2,913,452
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	496,324	441,683	
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	3,973,372	8,689	
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	633,316	26,383	
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	-	
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	492,013	374,082	117,931	
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	3,466,883	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	-	

2017 Health & Safety Funding Allocation

February 2023

	Total Funds	Spent To Date	Balance	Unalloc Balance
<b>Bond Fund Category: DS007 - Security Improvements</b>	<b>9,322,221</b>	<b>8,120,405</b>	<b>1,201,816</b>	<b>Security</b>
<i>Project Name: 2017 Bond Program</i>	716,103	-	716,103	716,103
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	2,430,344	82,197	
Project Name: Multi-2018-5025-Bond-Security-PKG2-FY19	2,419,821	2,054,525	365,296	
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>9,610,784</b>	<b>15,337,898</b>	<b>Water</b>
<i>Project Name: 2017 Bond Program</i>	10,146,516	-	10,146,516	10,146,516
Project Name: Multiple Sites - Drinking Fixture Replacement Program-Bid Package 31 - 5301 - FY.	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	331,301	22,841	
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	335,002	58,072	
Project Name: Multiple Sites - Drinking Fixture Replacemnt Prog-Bid Pkg 37 - 5453 - FY21	377,963	341,084	36,879	
Project Name: Multiple Sites - Drinking Fixture Replacemnt Prog-Bid Pkg 38 - 5477 - FY21	384,456	341,091	43,365	
Project Name: Multiple Sites - Drinking Fixture Replacemnt Prog-Bid Pkg 39 - 5478 - FY21	326,040	313,884	12,156	
Project Name: Multiple Sites - Drinking Fixture Replacemnt Prog-Bid Pkg 40 - 5540 - FY21	326,040	302,366	23,674	
Project Name: Multiple Sites - Drinking Fixture Replacemnt Prog-Bid Pkg 41 - 5541	484,440	453,642	30,798	
Project Name: Multiple Sites - Drinking Fixture Replacemnt Prog-Bid Pkg 42 - 5542	464,072	404,923	59,150	
Project Name: Multiple Sites - Drinking Fixture Replacemnt Prog-Bid Pkg 43 - 5640	386,229	354,009	32,220	
Project Name: Multiple Sites - Drinking Fixture Replacemnt Prog-Bid Pkg 44 - 5641	324,442	300,071	24,371	
Project Name: Multiple Sites - Drinking Fixture Replacemnt Prog-Bid Pkg 45 - 5642	430,011	384,214	45,797	
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	302,079	29,876	
Project Name: Multiple Sites - Drinking Fixture Replacemnt Prog-Bid Pkg 48 - 5743	409,860	375,313	34,547	
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	425,769	41,291	
Project Name: Multiple Sites - Drinking Fixture Replacemnt Prog-Bid Pkg 51 - 6120 -FY22	51,040	-	51,040	
Project Name: Multiple Sites - Lead in Water Repairs - 4517 - FY17	7,120,756	3,231,687	3,889,070	
Project Name: Multiple Sites - Lead in Water-Emergency Response - 4241 - FY16	311,867	162,147	149,720	
<b>Bond Fund Category: Management Costs</b>	<b>12,000,000</b>	<b>11,338,381</b>	<b>661,619</b>	
<i>Project Name: 2017 Bond Program</i>	11,937,608	11,288,157	649,451	
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>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>H&amp;S Unallocated</b>
<i>Project Name: 2017 Bond Program</i>	-	-	-	-
<b>Grand Total</b>	<b>158,000,000</b>	<b>119,135,958</b>	<b>38,864,042</b>	<b>22,764,679</b>

Bond Performance Audit Tracker  
 Status of Performance Audit Recommendations  
 February 2023 - BAC Report

<b>2018: FHS/RHS Construction Audits Controls Recommendations</b>				
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	Complete
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	Complete
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, 11 completed	100% Completed
	<u>Recommendations Marked as <b>Complete</b> Since Last Reporting</u>	
2018	5	This audit observation noted change order mark-ups had not been applied consistently to deductive changes. OSM has developed a Standard Operating Procedure for change requests that directs staff to review this issue as part of project review and approval of change orders.

THIS AUDIT YEAR'S RECOMMENDATIONS ARE COMPLETE AND THIS PAGE WILL BE REMOVED FROM FUTURE REPORTS.

Bond Performance Audit Tracker  
 Status of Performance Audit Recommendations  
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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	Complete
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, 9 completed	82% Completed

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	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  
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<b>2020 Bond Performance Audit Recommendations</b>				
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	Complete
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	Complete
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	Complete
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, 9 completed	82% Completed

Recommendations Marked as **Complete** Since Last Reporting

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 has also now developed a Standard Operating Procedure for change requests that directs staff to include documentation as part of project review and approval of change orders.
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Bond Performance Audit Tracker  
Status of Performance Audit Recommendations  
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Recommendations Marked as **Complete** Since Last Reporting

- |      |    |                                                                                                                                                                                                                                                                                                                                                                                                                                                                  |
|------|----|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| 2020 | 8  | GMP timing for the Jefferson HS Modernization project was presented to the Bond Accountability Committee (BAC) for discussion on 10/5/2022, and reported to the Board as part of the BAC and OSM Quarterly Updates to the Facilities & Operations Committee on 12/14/2022. There are no other CM/GC projects currently scheduled and/or funded with existing bond funds, but future projects will continue to have GMP timing explicitly discussed with the BAC. |
| 2020 | 10 | The CM/GC contract template language regarding timing of reconciled cost estimates has been updated to align with language in the architect/engineer services contract template.                                                                                                                                                                                                                                                                                 |

Status Notes on Recommendations Not Completed

- |      |    |                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                    |
|------|----|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| 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 2024 at the earliest for the Lincoln project. The Madison (McDaniel) project has recently closed out its CM/GC contract and is commencing the post-project analysis. |
| 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  
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<b>2021 Bond Performance Audit Recommendations</b>				
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	Complete
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	Complete
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	<b>10</b> Recommendations, <b>4</b> completed	<b>40%</b> Completed
	<u>Recommendations Marked as <b>Complete</b> Since Last Reporting</u>	
2021	6 A living document has been developed to formalize roles and responsibilities of staff and vendors regarding business equity-related procedures and reporting. The document has been shared with all OSM and P&C staff.	
2021	9 Staff have have thoroughly explored and documented all current system capabilities, functions and reports. Documentation is now available for future use.	

Bond Performance Audit Tracker  
Status of Performance Audit Recommendations  
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Status Notes on Recommendations Not Completed

2021	1	<p>Policy updates are scheduled by the Board and are therefore subject to the Board’s timeline. The Board has recently expressed interest in reviewing policy in this area and staff awaits further direction.</p>
2021	2	<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	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	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>

**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>6,592,351</b>	2,142,153	4,450,198	1,399,066	-	6,592,351	-
Unallocated Curriculum Funds	13,950,000	-	-	-	-	-	-	-
Climate Change - 5568	950,000	-	-	-	-	-	-	-
Digital Toolkit - 5683	-	<b>8,611,975</b>	7,300,000	1,311,975	6,162,628	298,707	8,611,975	-
Health - 5566	1,281,170	<b>1,796,573</b>	1,011,450	785,123	249,163	51,444	1,796,573	-
Humanities - 5561	12,825,000	<b>22,466,191</b>	17,430,632	5,035,559	16,959,160	8,662,381	22,466,191	-
Math - 5564	6,460,000	<b>15,817,003</b>	11,058,247	4,758,756	8,332,624	5,689,036	15,817,003	-
Physical Education - 5567	2,518,830	<b>3,132,261</b>	2,534,580	597,681	691,029	48,177	3,132,261	-
Science - 5563	6,729,800	<b>7,194,469</b>	6,788,592	405,877	2,752,679	31,629	7,194,469	-
SEL - 5562	1,054,500	<b>1,251,265</b>	1,054,500	196,765	347,103	15,711	1,251,265	-
Visual & Perf Arts - 5565	5,700,000	<b>4,296,172</b>	4,123,847	172,325	1,171,826	229	4,296,172	-
<b>Totals</b>	<b>53,444,000</b>	<b>71,158,259</b>	<b>53,444,000</b>	<b>17,714,259</b>	<b>38,065,278</b>	<b>14,797,313</b>	<b>71,158,259</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									★							
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 continuing to make progress to be in compliance with Oregon Department of Education's Division 22. There have been minimal shifts in schedule since July 2022.

At the start of school, in August 2022, PPS rolled out new curriculum, purchased through the school bond, in the following content areas:

- + K-5 English Language Arts (ELA)- Great Mind: Wit & Wisdom
- + 6-12 ELA- HMMH: Into Literature
- + 6-8 Mathematics- MidSchool Math
- + 9-12 Mathematics- McGraw Hill: Illustrative Mathematics
- + 3rd Grade Foundational Skills- Wilson: Foundations 3
- + K-8 Reading Interventions for Special Ed: Wilson: Reading Systems
- + K-5 Dyslexia Reading Intervention- Wilson: Just Words
- + 6-8 Spanish World Language (WL)- Klett: Reporteros
- + 6-8 Chinese Dual Language Immersion- (DLI)/WL Cengage: StepUp
- + 6-12 French WL-Wayside: Entre Cultures, Wayside: APPrenons, VHL: Chemins
- + 9-12 Spanish WL/DLI- Wayside: Azulejo, VHL: Descubre, VHL: Intrigas, VHL-Temas, VHL Imagina, VHL: Senderos and VHL: Revista
- + 9-12 German WL- VHL- Mosaik
- + 9-12 Italian WL- VHLSentieri
- + 9-12 Physical Education (PE): Open Up PE
- + K-5 Health Violence Prevention- Committee for Children: Second Step
- + K-5 Social Emotional Learning I- Collaborative Classroom- Caring School Communities.

In addition, PPS is currently working on evaluating and field testing materials for K-12 Social Sciences, K-12 English Language Learners, K-12 Visual and Performing Arts, K-12 Mental Health, 6-12 Japanese World Language and K-12 Social Emotional Learning II. These are all set to rollout in Fall 2023. In addition, we have begun work on our K-5 science adoption, which is set to rollout in Fall 2024.

### Accomplishments:

1. Successful delivery of materials to schools and rollout of two dozen new curricula across all schools in the district.
2. Starting the adoption process for 6 new content areas.

### Risks:

We continue to face the inflated cost of curriculum, which makes budgeting tight. In addition, supply chain issues have caused delays in materials getting to classrooms. An additional, imminent risk is that we are facing staff layoffs/unassignments, this will mean we need to use creative methods to support adoption work moving forward.

**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>29,745,766</b>	27,480,989	2,264,778	1,607,345	3,224,780	<b>6,737,773</b>	(23,007,993)
Classroom Modernization - 5516	24,780,325	<b>23,793,677</b>	23,743,677	50,000	11,339,025	1,351,077	<b>31,508,751</b>	7,715,074
Device Replacement - 5515	31,006,443	<b>38,719,161</b>	38,683,834	35,327	37,275,767	1,440,201	<b>43,817,894</b>	5,098,732
ERP Replacement Planning - 5518	11,107,080	<b>3,504,000</b>	250,000	3,254,000	971,950	2,283,225	<b>5,988,175</b>	2,484,175
Infrastructure & Security - 5517	38,041,500	<b>38,437,395</b>	38,041,500	395,895	12,844,949	6,358,486	<b>35,770,213</b>	(2,667,182)
<b>Totals</b>	<b>128,200,000</b>	<b>134,200,000</b>	<b>128,200,000</b>	<b>6,000,000</b>	<b>64,039,036</b>	<b>14,657,770</b>	<b>123,822,806</b>	<b>(10,377,194)</b>

**SCHEDULE**

	2022				2023				2024				2025			
	Q1	Q2	Q3	Q4	Q1	Q2	Q3	Q4	Q1	Q2	Q3	Q4	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

**PROJECT NOTES**

### Progress:

For the classroom tech installations: our installation team are finishing up the work for school group 1 (Boise, Cesar, Lane and George). They will also be starting this month on the wifi improvement project at the schools in school group 2 (Jefferson, Cleveland, Wells, Alliance at Meek, and Roseway Heights).

### Accomplishments:

The 5516 teaching station computer refresh has completed 32 schools already and we have 66 more to go! The 5518 ERP project foundational work is 56% completed. School group 1 classroom tech installations for 5516 and wifi installations for 5517 include the following % complete: Boise is 75% completed, Lane is 57% completed, George is 34% completed, and Cesar is 51% completed.

### Risks:

The original 2020 Technology scope included installing 100" anti-glare whiteboards on top of existing whiteboards to work in conjunction with the new wall-mounted projectors. Existing whiteboards were to be left in place in order to avoid disturbing potential hazardous materials during a removal. In April 2022, the 2020 Technology scope was changed to include the removal of the existing whiteboards. The new scope started in July 2022 with five schools as a pilot to determine schedule and cost. During the work on these schools, it was determined the new scope would significantly increase budget and schedule. In January 2023 the decision was made to revise the scope from wall-mounted projectors with new anti-glare whiteboards, to ceiling-mounted projectors with pull-down projector screens in front of existing whiteboards. This updated scope (which is consistent with recent HS modernization work) will allow for work to be completed sooner, however it has still pushed the work out to 2026, later than the original forecast of project completion by end of 2025.

**STATUS AT A GLANCE**

Legend:

	As planned: no concerns
	Caution: requires attention
	Impacts: impacts occurring

	As Planned	Caution	Impacts
Budget		X	
Equity	X		
Schedule	X		
Overall		X	

**BUDGET**

	BUDGET		FUNDING		PROGRESS		FORECAST		CONTINGENCY	
	Original Budget	Current Budget	Bond Funds	Other Funds	Actuals To Date	Additional Encumbered	Estimate At Completion	Over/Under	Work Compl	Cont Remain
Benson HS	202,000,000	<b>320,100,892</b>	306,208,270	13,892,622	138,353,660	163,205,522	<b>321,673,507</b>	1,572,615	55%	3%
Swing Sites	-	<b>13,789,989</b>	13,789,989	5,801	12,168,219	47,508	<b>12,217,374</b>	(1,572,615)	100%	11%
MPG Building	-	<b>76,293,840</b>	76,264,189	29,651	13,046,741	61,792,771	<b>76,293,840</b>	-	10%	6%
<b>Benson Totals</b>	<b>202,000,000</b>	<b>410,184,721</b>	<b>396,262,448</b>	<b>13,928,074</b>	<b>163,568,620</b>	<b>225,045,801</b>	<b>410,184,721</b>	-		

**EQUITY**

Percent of payments made to Certified owned businesses, percent of labor hours of apprenticeable trades; cumulative

	MBE	WBE	SDVBE	ESB	N-C	TOTAL	goal	MIN	goal	FEM	goal	APPR	req
Consultants	5.09%	8.54%	0.00%	1.40%	0.00%	<b>15.04%</b>	18%						
Contractors	4.47%	9.18%	0.00%	4.27%	0.57%	<b>18.50%</b>	18%						
Overall	4.62%	9.03%	0.00%	3.59%	0.44%	<b>17.67%</b>	18%						
Workforce								37%	25%	7%	14%	<b>22%</b>	20%

**SCHEDULE**

NEXT MILESTONE: Substantial Completion

On Track? Yes

PROJECT	2021			2022			2023			2024		
Benson HS Modernization												
Benson Swing Sites												
MPG Building												

Baseline	Planning	Design	Construction	School Opening
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## PROJECT NOTES

### Progress:

**BPHS:** Benson has received all permits, is overall 55% complete with construction, and the GMP was approved and the project is tracking on-budget. Scheduled completion is currently on target. OSM is continuing to find value engineering solutions to reduce costs alongside trade partners. PPS was awarded a \$2.5M grant from SRGP for Benson, which has been used to offset bond funds and did not add to the BPHS Budget. Builders Risk insurance was \$2.3M over budget. Existing conditions of the historic building, mostly unforeseen underground structures and hidden structure, have also depleted contingency funds more than expected. OSM anticipated many of these unforeseen conditions and is managing the contingency accordingly. Construction document coordination inaccuracies have also caused additional funding from contingencies that were more than anticipated. The CM/GC has released some additional funding from allowance savings no longer needed. The BPHS Team believes that with the project's available contingency, no further funding will be needed as existing building renovations are nearly complete.

**MPG:** MPG permit was delayed by 2 weeks. The CM/GC also discovered ten (10) additional dry wells that were abandoned-in-place and not recorded, which caused an additional 28-day delay and required additional owner contingency and DEQ approval to properly decommission them. The project bids were \$3.6M over the estimated construction costs. \$3.1M of that was for increases in steel prices. The CM/GC utilized approximately \$1M of their contractor contingency for the buyout difference to maintain their GMP of \$67,041,697. Builder Risk cost was within budget. The project's Final Completion date may be pushed out approximately 30-days, but the MPG Team is working to reduce this impact and school opening will not be impacted. The project budget has always been tight and these added costs, and possible future costs, will be challenging. There is currently approximately \$1M in added cost from additional AHJ comments, and designer coordination inaccuracies anticipated in the next several weeks, all of which will be funded from Owner Contingency. However, no projection for additional funds needed at this time and the opening date of Summer 2024 will be met.

### Accomplishments:

BPHS Project schedule is extremely complex and the team has been executing with great precision and will be completed on time.

MPG project schedule was compromised, but the team is working diligently to react and delivery of the building should not be impacted.

### Risks:

BPHS: Reduced contingencies due to unforeseen conditions and design coordination inaccuracies.

MPG: Schedule. Budget and contingency are very tight and are being closely watched.

### Safety (all numbers are To Date):

Labor Hours (BPHS):	<b>442,130</b>	Labor Hours (MPG):	<b>10,630</b>
OSHA Reportable Accidents (BPHS):	<b>0</b>	OSHA Reportable Accidents (MPG):	<b>0</b>
Recordable Incidents (BPHS):	<b>14 Recordable</b>	Recordable Incidents (MPG):	<b>2 Recordable</b>
Total Recordable Incident Rate (BPHS):	<b>6.33</b>	Total Recordable Incident Rate (MPG):	<b>37.6</b>

**STATUS AT A GLANCE**

Legend:

	As planned: no concerns
	Caution: requires attention
	Impacts: impacts occurring

	As Planned	Caution	Impacts
Budget	X		
Equity*		X	
Schedule	X		
Overall	X		

**BUDGET**

BUDGET		FUNDING		PROGRESS		FORECAST		CONTINGENCY IN CONTEXT	
Original Budget	Current Budget	Bond Funds	Other Funds	Actuals to Date	Additional Encumbered	Estimate At Completion	Over/Under	Work Complete / %	Contingency Remain / %
311,000,000	<b>366,000,000</b>	366,000,000	-	1,264,379	23,440,391	<b>366,000,000</b>	-	0%	15.00%

**EQUITY**

*Percent of payments made to Certified owned businesses, percent of labor hours of apprenticeable trades; cumulative*

	MBE	WBE	SDVBE	ESB	N-C	TOTAL	goal	MIN	goal	FEM	goal	APPR	req
Consultants	5.50%	3.16%	0.00%	0.00%	0.00%	<b>8.66%</b>	18%						
Contractors*	0.00%	0.00%	0.00%	0.00%	0.00%	<b>0.00%</b>	18%						
Overall	5.50%	3.16%	0.00%	0.00%	0.00%	<b>8.66%</b>	18%						
Workforce*								0%	25%	0%	14%	<b>0%</b>	20%

\* Construction payments have not yet been made.

**SCHEDULE**

NEXT MILESTONE: 100% SD ▼

On Track? Yes ▼

PROJECT PHASE	2023			2024			2025			2026		
Planning												
Design	★											
Construction												
School Opening(s)												Phase I

Baseline	Planning	Design	Construction	School Opening
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**PROJECT NOTES**

**Progress:**

- \* Design meetings focusing on ground floor program in order to establish the internal relationship of these program spaces and to determine access to these spaces from the overall site and in relation to the public right of way.
- \* Design phase programming meetings with District stakeholders underway.
- \* Following DAG application deadline, members selected, with first DAG meeting taking place on February 16.
- \* CM/GC RFP proposals due on February 23, with evaluation process to begin after that.

Note on Equity Status: Data reflects only payments to date for architecture and engineering consultants on Comprehensive Plan scope. Full design work will involved significantly more subconsultants once underway. Construction has not yet started.

**Accomplishments:**

- \* Board of Education approved Comprehensive Plan for Jefferson High School Modernization on Dec 13, 2022.
- \* Design phase community engagement has gotten underway, with weekly planning/strategy meetings to review ongoing engagement activities in the school & in the community.

**Risks:**

- \* Tight design & construction schedule will require careful coordination among the OA team, project stakeholders, and eventual selected CM/GC, in order to meet ultimate phased completion dates.
- \* Minimizing impacts on students & teachers during occupancy of an active construction site must be embedded in overall multi-phase construction approach.
- \* Mitigation of risks associated with existing conditions at 1909 building shell/foundation must be addressed through strategic approach to pre-construction planning & investigations.

**Safety (all numbers are To Date):**

Labor Hours:	<b>N/A</b>
OSHA Reportable Accidents:	<b>N/A</b>
Recordable Incidents:	<b>N/A</b>
Total Recordable Incident Rate:	<b>N/A</b>

**STATUS AT A GLANCE**

Legend:

	As planned: no concerns
	Caution: requires attention
	Impacts: impacts occurring

	As Planned	Caution	Impacts
Budget	X		
Equity	X		
Schedule	X		
Overall	X		

**BUDGET**

BUDGET		FUNDING		PROGRESS		FORECAST		CONTINGENCY IN CONTEXT	
Original Budget	Current Budget	Bond Funds	Other Funds	Actuals to Date	Additional Encumbered	Estimate At Completion	Over/Under	Work Complete / %	Contingency Remain / %
242,500,000	<b>242,619,558</b>	242,500,000	119,558	199,999,921	30,070,474	<b>234,607,428</b>	(8,012,130)	85%	5.29%

**EQUITY**

Percent of payments made to Certified owned businesses, percent of labor hours of apprenticeable trades; cumulative

	MBE	WBE	SDVBE	ESB	N-C	TOTAL	goal	MIN	goal	FEM	goal	APPR	req
Consultants	0.97%	5.59%	0.00%	2.38%	0.00%	<b>8.95%</b>	18%						
Contractors	2.54%	14.36%	0.00%	1.04%	1.54%	<b>19.47%</b>	18%						
Overall	2.39%	13.51%	0.00%	1.17%	1.39%	<b>18.45%</b>	18%						
Workforce								40%	25%	4%	14%	<b>22%</b>	20%

**SCHEDULE**

NEXT MILESTONE:

Substantial Completion ▼

On Track?

Yes ▼

PROJECT PHASE	2020				2021				2022				2023			
Planning																
Design																
Construction																
School Opening(s)																

Baseline	Planning	Design	Construction	School Opening
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**PROJECT NOTES**

**Progress:**

Phase 2 work is progressing on schedule. Major site grading and excavation was completed without weather delays. All site buildings are enclosed and most site walls are completed.

**Accomplishments:**

Phase 1 completed and fully operational with facility turnover set for March 2023. Student Engagement includes multiple contractors participating in teaching a Construction Management class once a week for two school years at LHS. So far five student interns have been hired for summer work during the project duration.

**Risks:**

Supply chain disruption, material cost escalation, labor market.

**Safety (all numbers are To Date):**

Labor Hours:	<b>751,053 as of January 31, 2023 (Average number of workers on site: 35)</b>
OSHA Reportable Accidents:	<b>13 (0 new since last report)</b>
Recordable Incidents:	<b>13 (0 new since last report)</b>
Total Recordable Incident Rate:	<b>3.46</b>

# **Report to The Portland Public Schools Board of Directors**

Date: March 2, 2023

From: Bond Accountability Committee

Subject: BAC Report #39

## **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  
Ryan Kinsella  
Jonathan Truit  
Cara Turano, Chair

## **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 February 23 2023 was held in virtual session. Three members participated, Greg DeLoreto, Jonathan Truit, and Ryan Kinsella. The video of the meeting was made available to the other members. In addition to the bond program administration update,

the meeting focused on the Bond Performance Audit, Curriculum and Technology updates, and Modernization projects from the three bond programs. The robust agenda reflects a change in the BAC meeting cadence which has transitioned from 6 two hour meetings per year to 4 two and a half hour meetings per year. There was no public comment.

## **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 Curriculum and Technology programs and Modernization projects 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. Forecasted cost overruns for Grant Upper Field improvements did not occur and Roosevelt Phase IV was completed within budget. Current projected costs for the 2012 bond program are \$348,118 under budget. Utilization of excess funds will be accessed in the coming months following close out of all open projects and go to prior add-on project requests at 2021 modernizations.
- Based on the information provided, it appears that 2017 and 2020 Bond programs will have sufficient funding for all of the modernization projects. Funding of the MPG project with 2020 funds, per the 2020 Bond measure, is complete and MPG will only be shown in the 2020 Program starting with this BAC update. McDaniel HS modernization and Kellogg Middle School, are in the close out phase and Phase 1 of Lincoln HS modernization was completed this summer, are all currently projected to underrun their respective budgets for a combined total of approximately \$10 million. Construction of Benson and MPG is complicated and the schedule was compromised by unforeseen conditions; however, delivery of the building will not be impacted. The current budget forecast is tracking within budget with OSM continuing to forecast full use of the 2017 Program Contingency to offset risk-related issues. The Jefferson HS Comprehensive Plan was approved by the Board of Education in December 2022 and the design phase is currently underway. The \$55 million budget increase is being covered by 2020 Bond Program contingency with no budgets being decreased from other projects and remaining contingency being adequate for the purpose of covering potential future project or program budget overage needs.

- Based on the information provided, it appears that 2017 and 2020 Bond programs will have more than sufficient funding to complete all the scope of work identified to date. The current forecast is indicating approximately \$14.9 million underrun (2017 Bond Program) and \$10.4 million underrun (2020 Bond Program).
- Specific to the 2020 Technology program, current forecast indicates \$10.3 million unallocated funds. PPS does plan to utilize all bond funds allocated for 2020 Technology but is still refining cost forecasts.
- Specific to the 2020 Curriculum program, all aspects of the project are running as planned in terms of scope, budget and schedule with sufficient funding to complete the scope of work. The funding includes Bond and Non-Bond funds, with non-Bond funds accounting for approximately \$17.7 million of the total funding and tracked outside of OSM by the Office of Teaching and Learning.

*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 Project Management Cost Report, 2020 Curriculum and Technology programs and Modernization projects expenditures, and budget forecasts 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. Project teams continue to mitigate potential scope implications due to current supply chain and cost escalation issues. 2020 Bond Capacity and Infrastructure projects identified to date are in various stages of implementation and in some cases the scope is not fully defined. Jefferson High School modernization design phase is underway and the DAG has selected members and began meeting in mid-February.

*4. Whether the projects are being delivered on **schedule** relative to the voter-approved bonds;*

- The BAC reviewed The Project Management Cost Report, 2020 Curriculum and Technology programs and Modernization projects expenditures, and budget forecasts 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.
- All of the modernization projects have either been completed on schedule or are currently tracking on schedule.
- In general, the 2020 Curriculum Program is on schedule with the risk that supply chain issues may delay materials getting into classrooms.
- In general, the 2020 Technology Program is on schedule. Installation of new anti-glare whiteboards for the Classroom Modernization project came across scope challenges that significantly increased the schedule for that portion of the work. After completing a pilot program with a handful of schools, the decision was made to revise the scope. While

the revised scope will still increase the schedule by roughly six months from the initial conceptual schedule, it has minimized previously anticipated schedule overruns.

*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.*

- Bond performance auditors Sjoberg Evashenk Consulting Inc provided an overview of the work plan for the Year 5 performance audit. Scope includes: 2017 and 2020 Bond delivery status; career learning equity in public purchasing and contracting; in-depth review of 2020 Bond Curriculum and Technology projects; and status review of prior audit recommendations.
- All bond revenues appear to be in compliance with state law and the ballot measure language.

*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%. Although the cumulative results of 16.43% are slightly below the goal, the last twelve months are tracking closer to the goal at over 20%.
  - Workforce Equity performance was presented for capital improvement programs. Minority workforce participation continues to track above the 25% goal at 29%; although female workforce participation remains at 5%, against a goal of 14%, it is consistent with current local participation with other agencies. Apprenticeship participation is tracking at 23%, over the 20% requirement.

*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:

- Recruitment of new BAC members to fill up to four vacancies due to the resignations of Kenechi Onyeagusi and Angela Jarvis Holland as well as Karen Weylandt and Tom Peterson's terms ending last year. At a minimum the charter requires one additional member. The recruitment of more women and people of color is being highly recommended by the current BAC members.

In conclusion, we commend the district with what they have accomplished while dealing with the continued challenges within the current economy. In particular the BAC was impressed with the successful delivery of materials to schools and the rollout of two dozen new curricula across all schools in the district. Also of note, were the equity numbers on the Benson HS Modernization where minority participation is tracking at 37% compared to the goal of 25% and female participation is at 7%. 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:  
<https://www.pps.net/cms/lib/OR01913224/Centricity/Domain/62/BAC%20Charter%20-%20Updated%2005%2011%202021.pdf>
- BAC Work Plan:  
<https://docs.google.com/document/d/1NkKTMJRYmkU6c9yYIA4sHuz8RWCNEFyiDuwkvCFAxtA/edit?usp=sharing>
- Bond Language
  - 2012
  - 2017
  - 2020
- OSM documents
  - February 23, 2023 BAC Materials:  
[https://drive.google.com/drive/folders/19hmUvccGHvorn4D6xLbO1jKYsvoW4wXd?usp=share\\_link](https://drive.google.com/drive/folders/19hmUvccGHvorn4D6xLbO1jKYsvoW4wXd?usp=share_link)