



## **West Linn – Wilsonville Schools**

### **Long Range Planning & Bond Oversight Committee Meeting Zoom Meeting Wednesday, January 19, 2022 6:00 PM**

#### **Bond Oversight Committee Meeting**

1. Call to Order 6:04 PM

2. Roll Call	<b>Mary Pettenger</b>	<b>Kirsten Wyatt, Board Liaison</b>
	Julie Miller	Kathy Ludwig, Superintendent
	Julie Stone	Pat McGough, Chief Operations Officer
	Samy Nada	<b>Remo Douglas, Bond Program Manager</b>
	<b>Parasa Chanramy</b>	<b>Amy Berger, Bond Coordinator</b>
	<b>Kim Jordan</b>	
	<b>Amy Paterson Sandie</b>	

3. Quarterly Report: The 4<sup>th</sup> Quarter 2021 Report:

- a. The overall program summary shows over \$54.8 million has been spent through January 13, 2022. Project work has increased dramatically over the course of the last year.
- b. Over \$158 million is committed in contracts thus far, nearly 70% of the program budget. The program is showing just under \$2.4 Million over budget at the end of the quarter as of current estimates and contract values. The end of last quarter was right around \$3 Million over. The bond team remains confident that the program will be completed within budget.
- c. The bond team is working efficiently and has gotten money back in the form of reimbursements from various entities. The state has various grants available such as E-Rate, Energy Trust of Oregon and SB1149. The district projects often include energy efficient upgrades with then utilizes these grants. The tree harvesting at the Dollar Street site also has generated funds to the good of the district. Total reimbursements for this quarter are over \$600,000, with over \$150,000 being from the tree harvesting.
- d. The district has also been reimbursed the total of the OSCIM grant that was awarded when the bond passed. Work in place for Wood and Athey have allowed the team to get the full grand amount reimbursed. That amount was just under \$7.2 Million.
- e. Not all bonds have been sold for the 2019 program. 206.8Million in bonds were passed, roughly \$150 million were sold in early 2020 after the bond passed. There is an obligation to spend 85% within 3 years after bonds are

sold, which is why not all bonds are sold up front. The district is in talks with financial advisors on when might be the best time to sell the remaining bonds as well as looking at the forecasted spending to determine if the required rate of spending would be met. The market is good right now, so the team is researching and will meet internally to discuss the best fiscally responsible timeline for the sale along with possibly refinancing existing bonds. Refinancing the current bonds in this market could save taxpayer money.

- f. The Athey Creek Middle School at Dollar Street project has been appealed to the Land Use Board of Appeals (LUBA). The hearing on the matter will be held on February 1<sup>st</sup>. The district is highly confident in successful resolution.
- g. Bids came in for the new Athey Creek Middle School at Dollar Street. The bond team was happy with the bid results. All alternates were able to be accepted, and the total construction contract is \$61,547,000.00. Activity on site including the tree harvesting and contractor fencing and ground work has started. The district has a phone number set up to allow people to voice their concerns and get a chance to talk to district staff. District staff has had several interactions with concerned neighbors, on the phone, in person at the site, in driveways, etc. and will always be available as the project continues
- h. WLHS Stadium has been delayed due to many circumstances with COVID and weather. The project although behind is has been able to take advantage of dry weather when it comes. The project is expected to open the site up at the end of February. The bond team is coordinating with the school leadership to allow for as many athletic events on the field as possible.
- i. The new primary school at Frog Pond pre-design meetings have begun. Assistant Superintendent of Primary Schools, David Pryor and Sunset Principal, Michelle Wilson are on the district team along with the bond team and architects. Two meetings have been held thus far as the team digs into lessons learned and deep dives into a handful of topics. The deep dive topics include Makerspace, Blended Learning, Outdoor Wellness and play, Restrooms, and Student Services and Counseling. For each deep dive other district administrators are brought in for their role of expertise. Part of the new primary school build includes a new storage building on the Stafford River property, which is nearly complete. Once complete the storage at the existing buildings at the Frog Pond Site can be emptied and prepared for future demolition and construction of the primary school.
- j. WHS block walls have reached approximately 18 feet above ground after months of extensive basement and underground work.

Adjourn BOC Meeting: 6:47 PM

### **Long Range Planning Committee Meeting**

1. District Signage: The signs have been installed in the specified district properties. They have a QR Code that directs users to a district webpage with general

information about the property, address, approximate size, map and intended use if known. They are installed at the Dollar Street site on both Willamette Falls Drive and Dollar Street, as well as one at the Frog Pond site and one at the district owned property on 60<sup>th</sup> Ave by Meridian Creek Middle School.

2. District update on Oppenlander – The City of West Linn will be putting the purchase of this property before the voters in the May 2022 election. The school board approved the Purchase and Sales Agreement with the City of West Linn during the board meeting last week. The appraisal is currently being conducted and once final the city will put the item on the ballot for voters in May.
3. The district is purchasing a 20 acre residential properties next door to the Administration Building. The owners of the home approached the district with the idea. The property is zoned for exclusive farm use but the district can do a lot line adjustment to add a small portion to the administration building lot, and that can be used to support the admin, such as adding parking. The board approved the purchase of the property in a board meeting last November. The property is outside the Urban Growth Boundary and the district owning the land could become very useful if the area comes into the UGB and the need for a school arises.
4. The two lots across the street from West Linn High School that the district presented to the committee as in process at the last LRPC meeting have been purchased. The district does not currently have funding to develop these properties, but the longer term plan would be to hopefully relieve more parking problems at WLHS with additional parking at this site.
5. Future District Property: This item will remain. The committee will consider future land needs. The Long Range Planning Committee will continue to consider what information may be needed to study possible needs looking into the future of the district, in terms of property. The LRPC's primary task is looking at the long range needs of the district. Should the district be looking out into the future for school site needs? What are city and county masterplans? Where is future growth coming from? Is now the time to start looking for land to accommodate long term growth?

Adjourn: 7:02 PM  
Next meeting: April 20, 2022



## **West Linn – Wilsonville Schools**

### **Long Range Planning-Bond Oversight Committee Meeting Virtual Meeting on Zoom**

**Wednesday, January 19, 2022 6:00 PM**

#### **Agenda**

##### **Bond Oversight Committee Meeting**

1. **6:00 p.m.** Call to Order
2. **6:00 p.m.** Roll Call

Mary Pettenger	Kirstin Wyatt, Board Liaison
Julie Miller	Kathy Ludwig, Superintendent
Julie Stone	Pat McGough, Chief Operating Officer
Samy Nada	Remo Douglas, Bond Program Manager
Parasa Chanramy	Amy Berger, Bond Coordinator
Kim Jordan	
Amy Paterson Sandie	
3. **6:05 p.m.** Quarter 4 2021 Report by Remo Douglas/Amy Berger
  - a. **6:05 p.m.** Financials
4. **6:45 p.m.** Adjourn BOC Meeting

##### **Long Range Planning Committee Meeting**

1. **6:45 p.m.** Call to Order
2. **6:45 p.m.** District Site Signage Update by Amy Berger
3. **6:50 p.m.** Oppenlander Site Update by Remo Douglas
4. **6:55 p.m.** Brock Property Update by Remo Douglas
5. **7:00 p.m.** Future District Property by Remo Douglas
6. **7:15 p.m.** Adjourn LRPC Meeting



January 2022



## WEST LINN - WILSONVILLE SCHOOL DISTRICT

2019 Capital Bond Program

Quarterly Report

Q4 2021

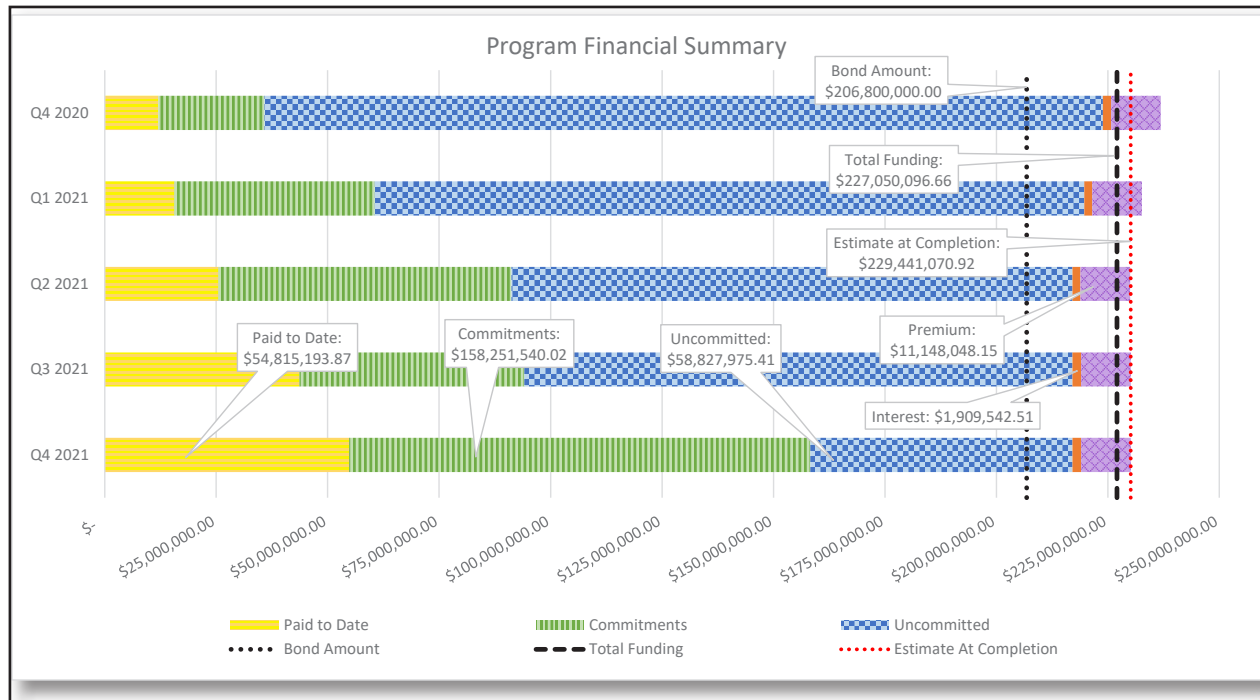
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# PROGRAM SUMMARY

Q4 2021



Bond Component	Original Budget	Approved Budget Changes	Current Budget	Current Commitments	Actuals Approved	Estimate At Completion	Forecasted Over/(Under)
Bond Component: 2. Addition & Renovation @ WHS	28,470,000.00	9,273,063.38	37,743,063.38	33,297,489.45	6,197,194.50	37,743,063.38	0.00
Bond Component: 3. New Middle School @ DLR	78,000,000.00	0.00	78,000,000.00	70,004,052.36	6,916,257.46	82,407,478.43	4,407,478.43
Bond Component: 4. Third Option High School	11,673,000.00	2,804,890.00	14,477,890.00	9,433,129.03	6,513,434.11	12,842,321.99	(1,635,568.01)
Bond Component: 5. Stadium & Parking @ WLHS	8,625,000.00	(499,528.83)	8,125,471.17	7,478,372.72	6,256,115.70	7,971,139.32	(154,331.85)
Bond Component: 6. New Primary School @ FP	39,000,000.00	0.00	39,000,000.00	3,801,874.69	2,448,440.88	39,000,000.00	0.00
Bond Component: 7. Learning with Technology	15,000,000.00	(750,000.00)	14,250,000.00	8,128,759.01	5,546,565.91	14,250,000.00	0.00
Bond Component: 8. Facility Improvements	26,032,000.00	1,747,616.00	27,779,616.00	19,338,131.60	17,884,074.89	27,553,011.69	(226,604.31)
<b>Subtotal</b>	<b>206,800,000.00</b>	<b>12,576,040.55</b>	<b>219,376,040.55</b>	<b>151,481,808.86</b>	<b>51,762,083.45</b>	<b>221,767,014.81</b>	<b>2,390,974.26</b>
Bond Component: 1. Program	20,139,622.10	(12,465,565.99)	7,674,056.11	6,769,731.16	3,053,110.42	7,674,056.11	0.00
<b>Grand Totals</b>	<b>226,939,622.10</b>	<b>110,474.56</b>	<b>227,050,096.66</b>	<b>158,251,540.02</b>	<b>54,815,193.87</b>	<b>229,441,070.92</b>	<b>2,390,974.26</b>

Community members interested in keeping up with the bond program can sign up for email updates through the District's ListServ system at: <https://listserv.wlww.k12.or.us/self-service/>

- Nearly 70% of current funding, or \$158.2 million, has been committed
- \$54.8 million has been spent, just above 24% of current funding
- Current estimates for projects include design and escalation contingencies, as well as bid alternate scope
- The forecasted over/under for the program was reduced by another half million dollars this quarter
- The Bond Management Team remains confident in completing all bond projects within available funds
- Contract is executed for the new Athey Creek Middle School at Dollar Street
- Security and Heating Ventilation and Air Conditioning upgrades at four schools are complete
- Financial data current as of January 13, 2022
- Learning with Technology projects are underway and gearing up for summer 2022

# CONSULTANT SELECTION & PROGRAM MARKETING

Q4 2021

## Consultant Selection:

The below list of consultants have District contacts under the 2019 Capital Bond Program:

- 3J Consulting - Civil Engineering & Planning
- BORA Architects - Architecture
- Carlson Testing - Testing & Inspections
- CBRE Heery - Program Management & Commissioning
- Compass Land Surveyors - Surveying
- DKS Associates - Traffing Engineering
- GeoDesign/NV5 - Geotechnical Engineering
- IBI Group Architects - Architecture
- Keith Liden - Planning
- Northwest Geotech - Geotechnical Engineering
- Osprey Solutions - Wildlife
- Pacific Habitat Services - Wetland & Wildlife
- PAE Consulting Engineers - MEP Engineering
- PBS Environmental - Environmental Consultant
- Phil Broome - Constructability Consultant
- River Levett Bucknall - Estimating
- Teragan & Associates - Arborist
- The Davey Tree Expert Company - Arborist
- The Pacific Resources Group - Arborist
- Willamette Cultural Resources Associates - Archeologist

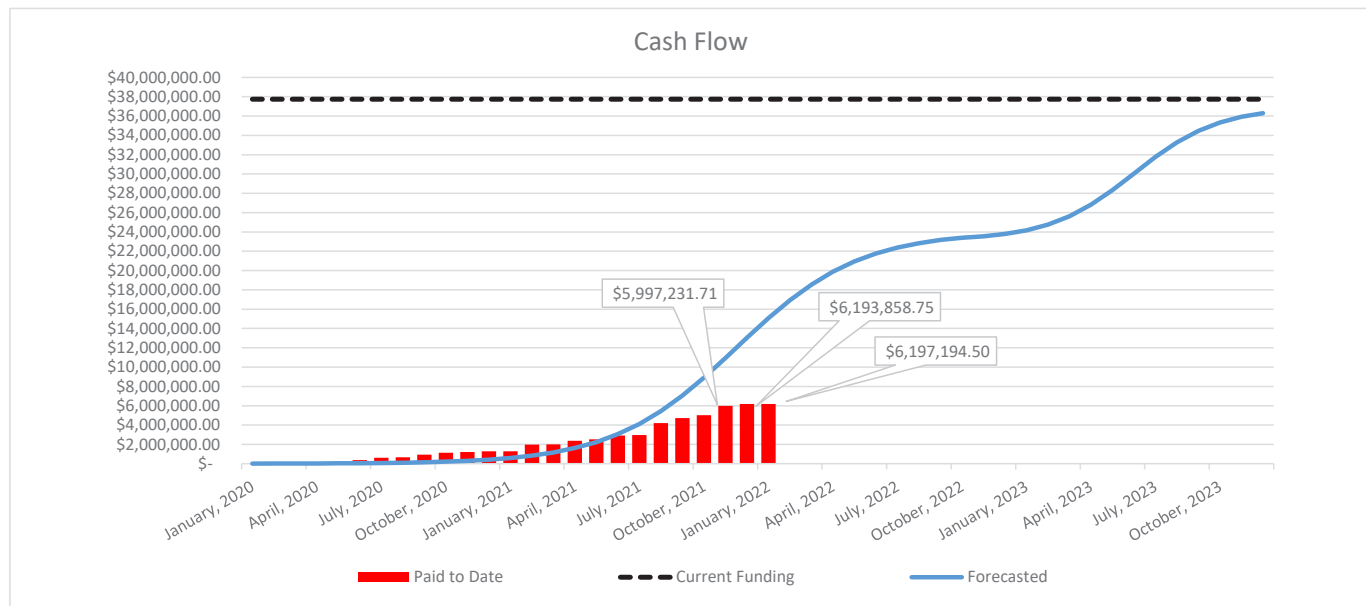
## Program Marketing:

The bond management team is developing a program marketing plan to improve outreach to contractors, including minority and women-owned firms. The goal is to develop an extensive network of industry contacts that are kept informed of current and upcoming opportunities. A variety of platforms both formal and informal are being used to reach out and encourage all contractors that they are welcome, will be treated fairly, and can receive training on district-specific forms and processes.

The Bond Management Team is already reaching out to dozens of contractors via phone, email and virtual meeting. The new West Linn - Wilsonville Construction Office LinkedIn page continues to see traffic, and bond management team members are forwarding posts to their online networks. Bids are also being placed on the state procurement website, OregonBuys, which includes notification to certified minority contractors. The district has reached out to Oregon Association of Minority Entrepreneurs (OAME) and National Association of Minority Contractors (NAMC) regarding additional opportunity to connect with minority contractors.

## ADDITION & RENOVATION @ WHS

### Q4 2021



New 600 seat auditorium with supporting spaces to better accommodate growing school programs and support community performing arts. Also includes additional parking, site circulation improvements, synthetic turf softball field with sports field lights, and energy efficient lighting upgrades. Renovation of existing auditorium and black box theater spaces, conversion to classroom spaces including Career and Technical Education. Also includes safety & security upgrades, energy efficient lighting upgrades and mechanical equipment replacement.

Construction is expected to be phased from summer 2021 through summer 2023. The new auditorium is expected to open January 2023. Renovated spaces are expected to open Fall 2023.

#### Recent Activities:

- Sub grade foundations and walls are complete
- Basement slab is complete
- Phased sewer line relocation has begun
- Interior block wall erection has begun
- Single occupant restrooms walls are framed and Mechanical Electrical and Plumbing work is nearing completion
- New drama office framing has begun

#### Upcoming Activities:

- Basement back fill starting soon
- Shallow footings for shop and lobby walls
- Central core block walls will continue to rise along with concurrent Mechanical Electrical and Plumbing install
- Elevated stage deck concrete pour
- Auditorium house Mechanical Electrical and Plumbing underground install and slab prep work
- Preparatory work to facilitate upcoming summer building work



# ADDITION & RENOVATION @ WHS

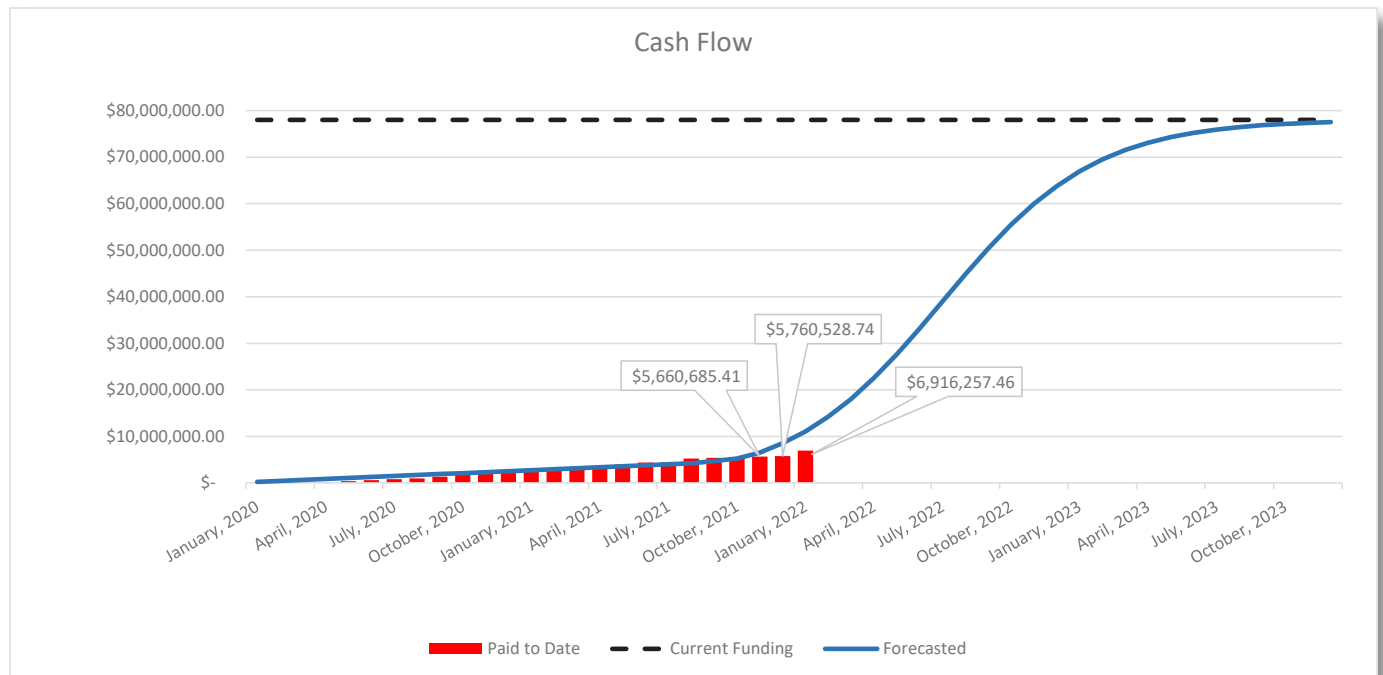
Q4 2021





## ATHEY CREEK MIDDLE SCHOOL @ DLR

### Q4 2021



New 850 student middle school at the District's Dollar Street property to make Athey Creek Middle School a neighborhood school, and to provide a central location for the third option high school.

Construction is expected early 2022 through summer 2023.

#### Recent Activities:

- City Council confirmed the Planning Commissions approval and issued a notice of Final Decision
- The project has been appealed to LUBA (Land Use Board of Appeals)
- Harvesting of the overgrown Christmas tree farm occurred in early December
- Harvested trees have been sold to local mills for a variety of purposes including milled lumber and pulp
- The district has been meeting to determine best ways to repurpose harvested trees from the site in the project
- The City of West Linn has completed review for the Building Permit
- DEQ approved the 1200-C Erosion Control Permit
- General contractor bids were received. Emerick Construction was awarded the project with all alternates
- Continued collaboration with the City of West Linn for the right of way work along Willamette Falls Drive
- Furniture layouts and design meetings continue

#### Upcoming Activities:

- Public Improvement drawings will be submitted to the City in February 2022
- Procurement of long lead items will be addressed with the general contractor
- The contractor will be fully mobilizing and on site in Feb/March 2022
- The district submits documentation for the LUBA appeal

ATHEY CREEK MIDDLE SCHOOL @ DLR  
Q4 2021



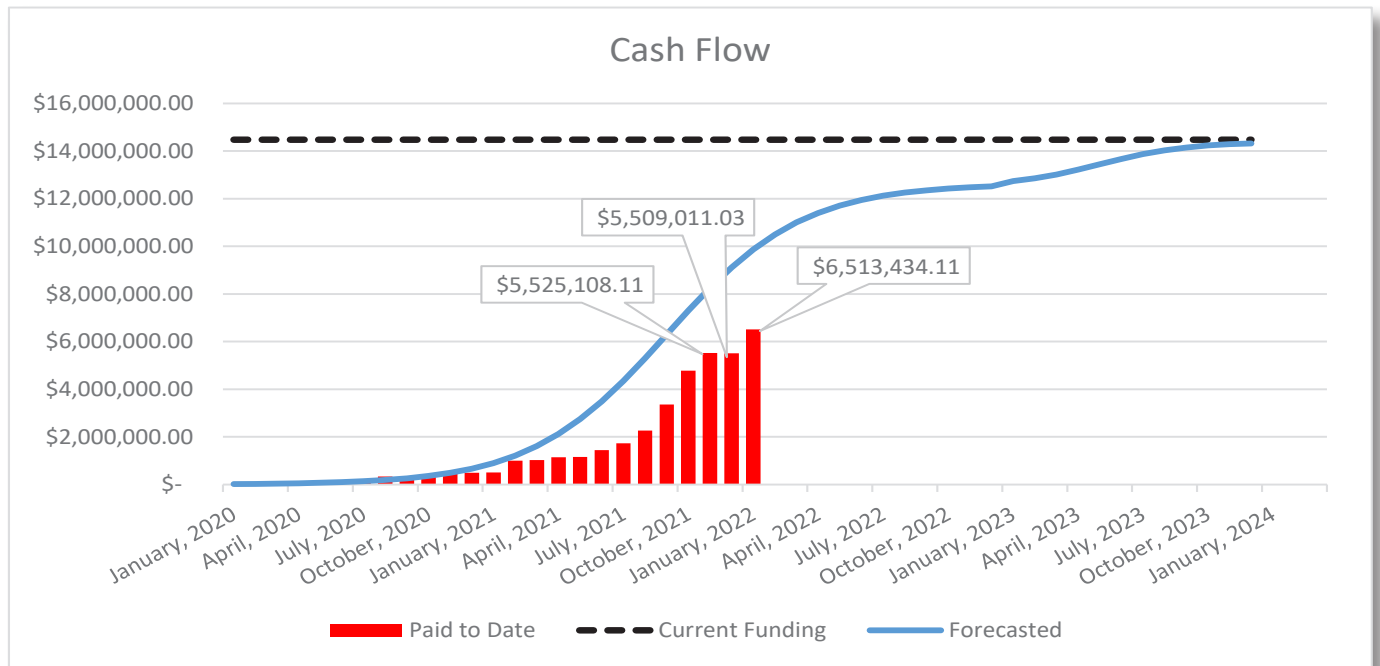


ATHEY CREEK MIDDLE SCHOOL @ DLR  
Q4 2021



## THIRD OPTION HIGH SCHOOL

### Q4 2021



Office addition to accommodate the third option high school and create a secure entry. Renovation of existing office space, conversion to classroom spaces including Career and Technical Education. Also includes mechanical, electrical and plumbing upgrades, roofing replacement, kitchen equipment upgrades.

Construction is expected summer 2021 through summer 2023.

#### Recent Activities:

- New Addition roof is complete
- Brick facade nearing completion
- Interior walls are framed, covered and ready for paint
- Well system shutdown, cleaning and inspection and control system upgrades occurred

#### Upcoming Activities:

- Existing slope roof work continues
- Completion of interior finishes
- Furniture installation
- Renovation of existing office space starting up Spring 2022



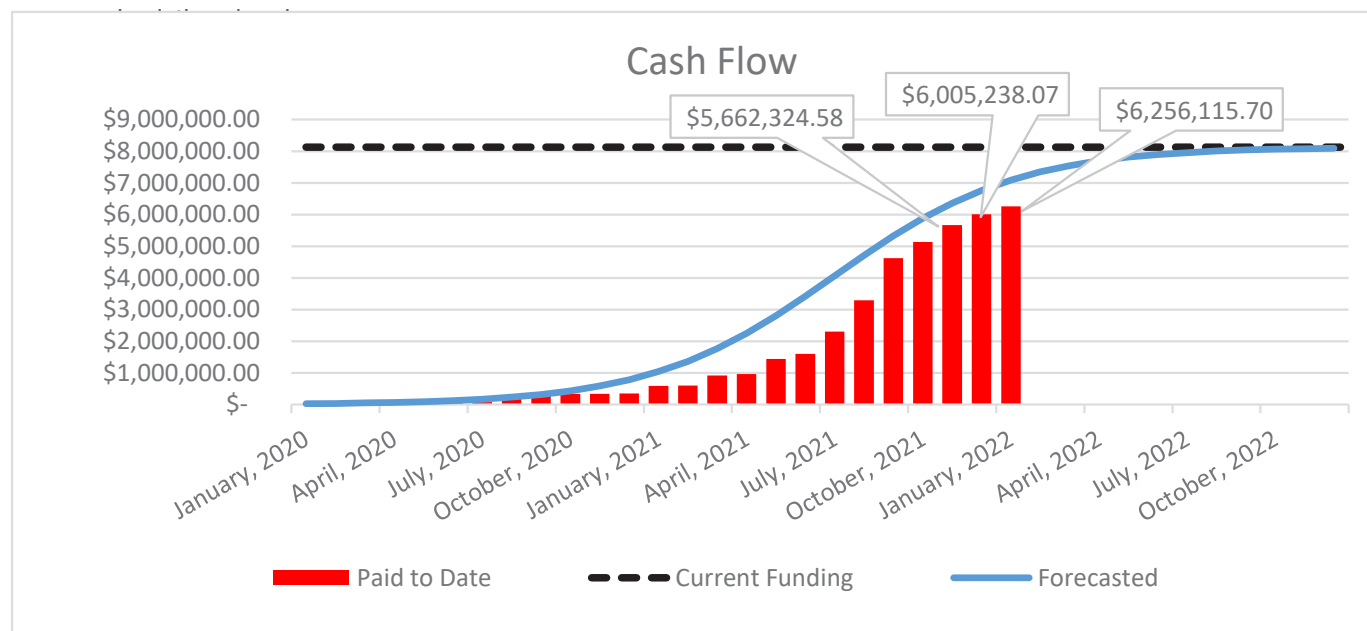
# THIRD OPTION HIGH SCHOOL

Q4 2021



## STADIUM & PARKING @ WLHS

Q4 2021



Additional stadium seating and parking to better accommodate full student body gatherings as well as spectators already attending athletic events, improving safety and accessibility. Energy efficient sports field lighting upgrade also included.

Construction is expected spring and summer 2021.

### Recent Activities:

- Stadium roof structure is complete
- Concrete layout in the upper plaza continues and curved walls have been poured
- The new parking lot curbs, light pole bases, and irrigation is complete
- Storm drain detention system tanks in the upper plaza are complete
- New stadium seating is complete and handrail installation has begun
- Components for the new audio-visual system have arrived and are being installed

### Upcoming Activities:

- Paving of the new parking lot will occur when weather allows
- Storm drain tanks in the lower plaza
- The parking lot, stadium and upper plaza are anticipated to be turned over to the district at the end of February
- The contractor will be working with the City to obtain temporary occupancy



# STADIUM & PARKING @ WLHS

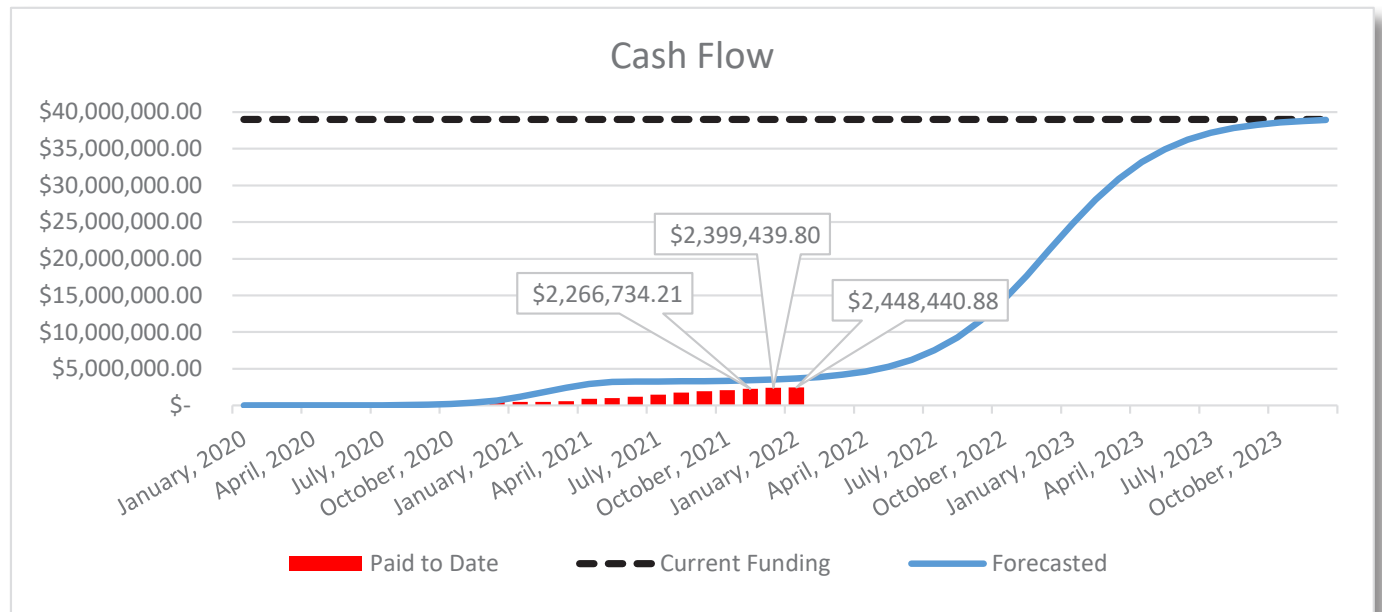
Q4 2021





## NEW PRIMARY SCHOOL @ FP

### Q4 2021



New 350 student starter primary school on the Frog Pond site to accommodate enrollment growth. New storage building to replace the storage being demolished at the new primary school site.

Design of the primary school is expected to begin in 2021.

Construction of the new primary school is expected summer 2023 through summer 2024.

Construction of the district storage is underway and expected to be complete Fall 2021.

#### Recent Activities:

- Building framing and siding complete
- Building painting began
- Parking lot graded for paving

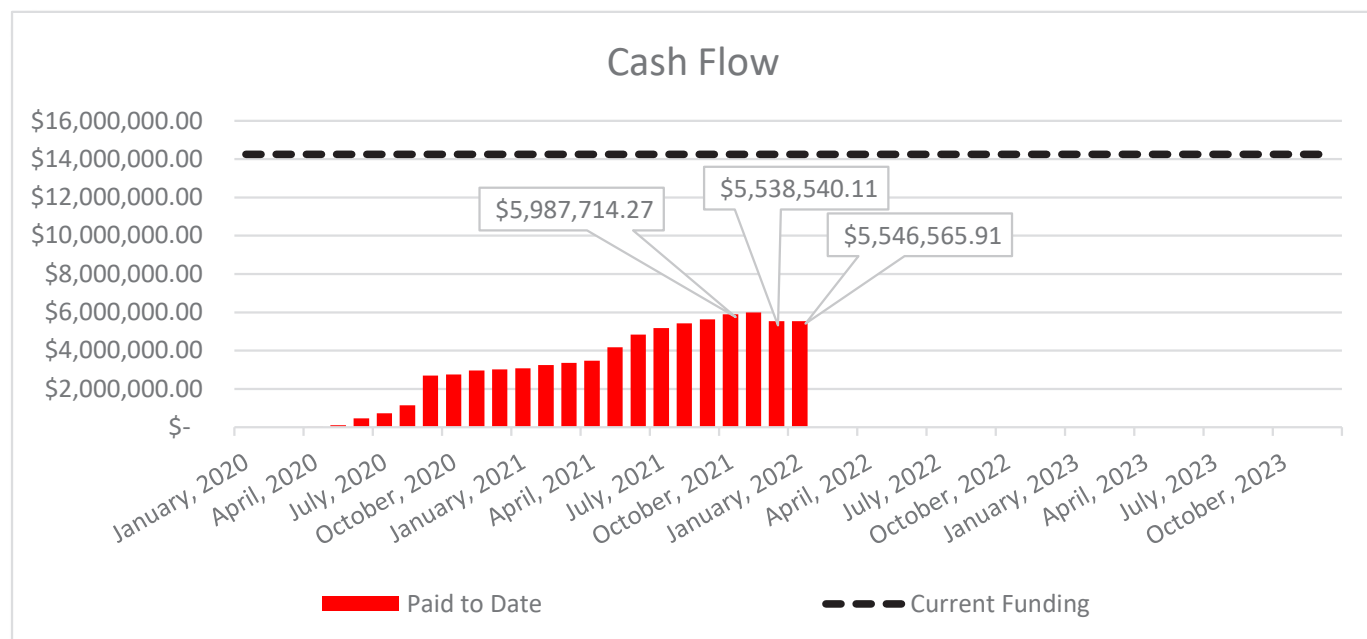
#### Upcoming Activities:

- Completion of the storage building and all related site work
- Pre-Design phase meetings begin with district stakeholders and consultants



## LEARNING WITH TECHNOLOGY

Q4 2021



This project will roll out in phases across the District and include a wide array of infrastructure and devices that support student learning.

### Recent Activities:

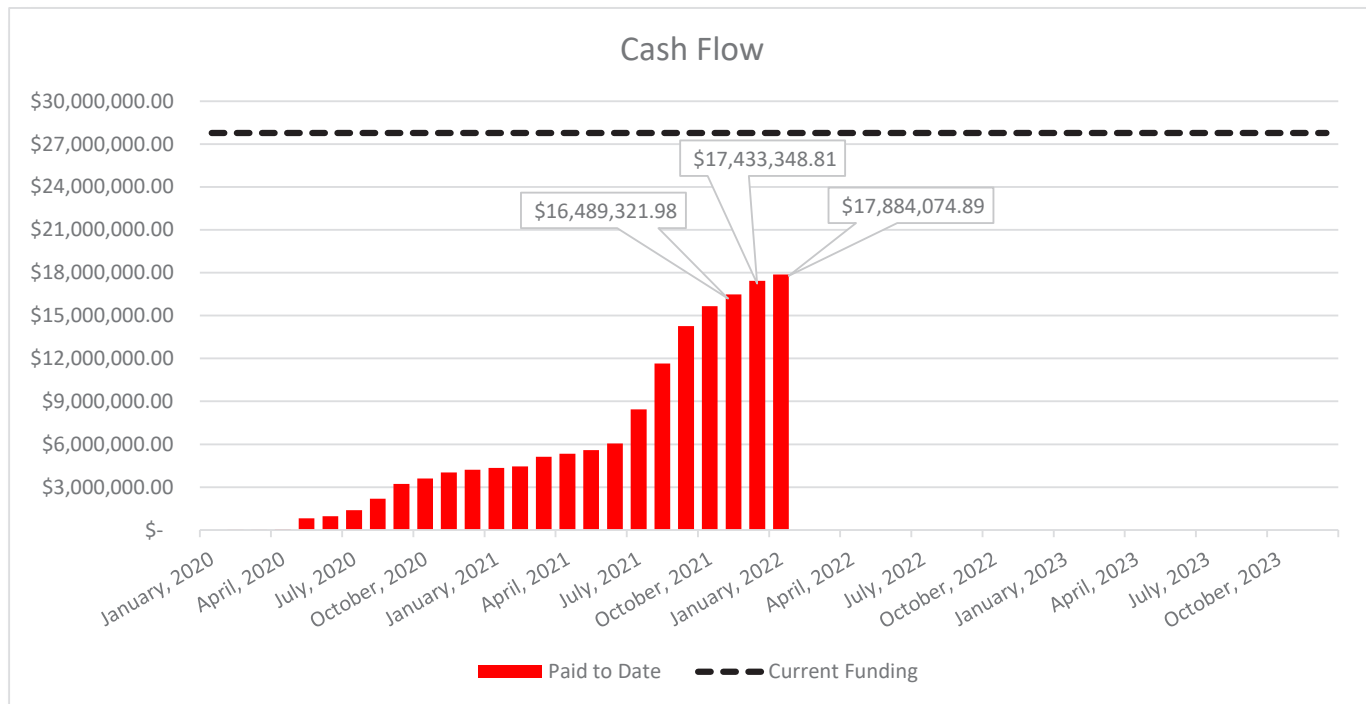
- Finishing the installation of new network electronics
- Starting printer fleet replacement
- Digital signage beginning
- E-Rate program reimbursements for technology purchases were received

### Upcoming Activities:

- WIFI update coming summer 2022
- Replacement of approximately 4,000 Chromebooks summer 2022
- Printer fleet replacement spring 2022

## FACILITY IMPROVEMENTS

### Q4 2021



These projects across the District will roll out in phases and include safety, life cycle replacement of building systems, energy efficiency upgrades, accessibility improvements and renovations. The following pages will provide updates for each of these projects.

### **19034.011 – Renovation at Wood Middle School**

#### **Project Status:**

Light renovation through various parts of the school, total renovation of front classroom cluster, relocation of office and creation of maker space and a restroom/concessions building addition. Design includes security upgrades, energy efficiency improvements, and the life cycle replacement of mechanical and fire alarm systems.

#### **Recent Activities:**

- Office staff moved into newly constructed office space
- New Makerspace is complete and in use
- Addition is underway
- New single occupant gender neutral restrooms are complete

#### **Upcoming Activities:**

- Complete addition
- Finish punchlist in the main building





## FACILITY IMPROVEMENTS

Q4 2021

### **19049.009 – Renovations at Stafford Primary School & Willamette Primary School**

#### **Project Status:**

This project includes classroom air conditioning, security improvements, and other life cycle replacement work. Also included is a new accessible and secure entry for Willamette Primary School.

This project is complete

### **19050.009 – Renovations at Bolton Primary School and Cedaroak Park Primary School**

#### **Project Status:**

This project includes classroom air conditioning and other life cycle replacement work. Also included are lighting upgrades at Bolton Primary School.

This is complete

### **19053.017 – Roofing at Boeckman Creek Primary School**

#### **Project Status:**

This project includes a complete roof replacement at Boeckman Creek Primary School.

This project design is underway.

### **19054.017 – Fire Sprinklers at Boeckman Creek Park Primary School**

#### **Project Status:**

This project includes a complete fire sprinkler system replacement at Boeckman Creek Primary School.

This project design is underway.