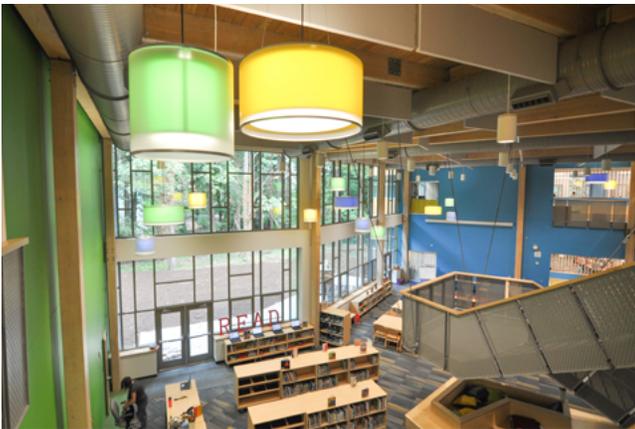




April 2018



**WEST LINN - WILSONVILLE SCHOOL DISTRICT**  
2014 Capital Bond Program  
Quarterly Report

Q1 2018

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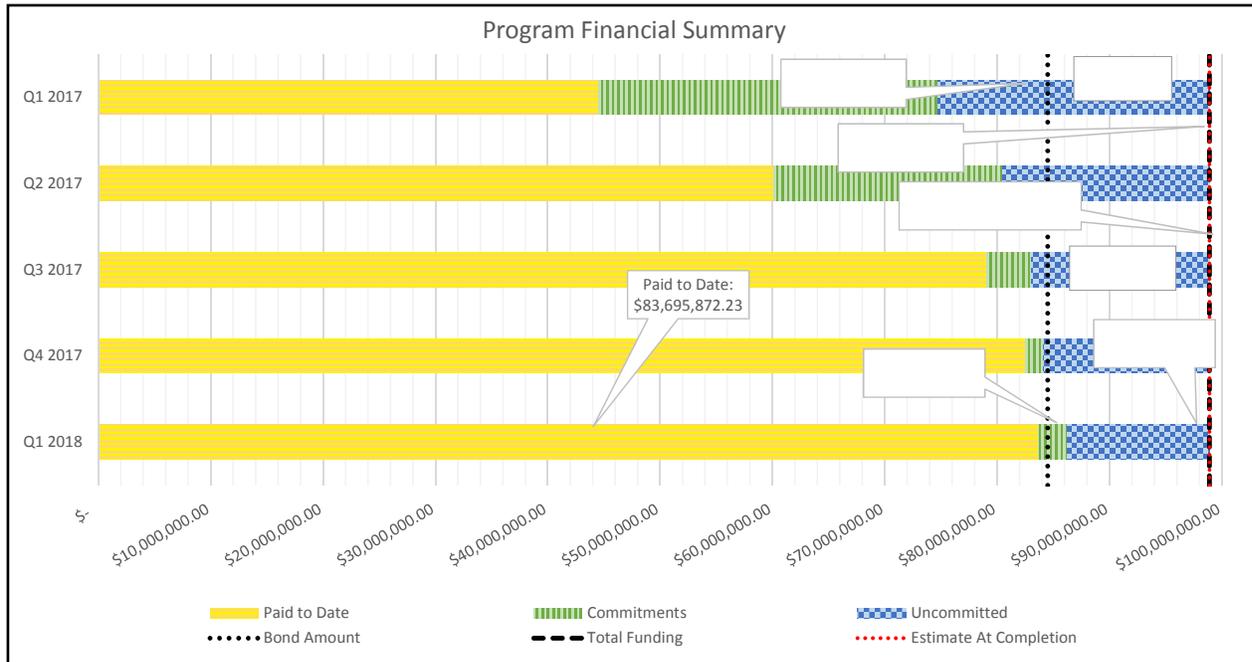
Q1 2018



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# PROGRAM SUMMARY

Q1 2018



	Original Funding	Approved Changes	Current Funding	Current Commitments	Paid to Date	Estimate At Completion	Forecasted Over/(Under)
New Middle School in Wilsonville	40,000,000.00	-225,746.08	39,774,253.92	38,689,180.23	38,328,002.55	39,774,253.92	0.00
Sunset Primary School Replacement	24,000,000.00	1,294,095.55	25,294,095.55	24,361,072.57	24,157,029.26	25,294,095.55	0.00
700 Building Renovation & Addition @ WLHS	3,000,000.00	754,051.54	3,754,051.54	3,590,970.81	3,588,266.58	3,754,051.54	0.00
Performing Arts Renovation & Addition @ WHS	3,000,000.00	240,781.37	3,240,781.37	3,174,161.29	3,170,942.06	3,240,781.37	0.00
Technology @ D-W	7,000,000.00	0.00	7,000,000.00	5,574,228.90	5,548,648.90	7,000,000.00	0.00
Safety & Security @ D-W	500,000.00	1,500,000.00	2,000,000.00	1,244,420.66	882,677.81	2,000,000.00	0.00
Improvements @ D-W	7,000,000.00	10,389,699.40	17,389,699.40	9,393,559.55	7,762,840.65	17,389,699.40	0.00
<b>Subtotals</b>	<b>84,500,000.00</b>	<b>13,952,881.78</b>	<b>98,452,881.78</b>	<b>86,027,594.01</b>	<b>83,438,407.81</b>	<b>98,452,881.78</b>	<b>0.00</b>
*Bond Premium	14,005,901.02	-13,652,881.78	353,019.24	257,464.42	257,464.42	353,019.24	0.00
Estimated Interest Earnings	400,000.00	-300,000.00	100,000.00	0.00	0.00	100,000.00	0.00
<b>Subtotals</b>	<b>14,405,901.02</b>	<b>-13,952,881.78</b>	<b>453,019.24</b>	<b>257,464.42</b>	<b>257,464.42</b>	<b>453,019.24</b>	<b>0.00</b>
<b>Grand Totals</b>	<b>98,905,901.02</b>	<b>0.00</b>	<b>98,905,901.02</b>	<b>86,285,058.43</b>	<b>83,695,872.23</b>	<b>98,905,901.02</b>	<b>0.00</b>

\*Includes \$4,505,000.00 in as-yet unsold bonds.

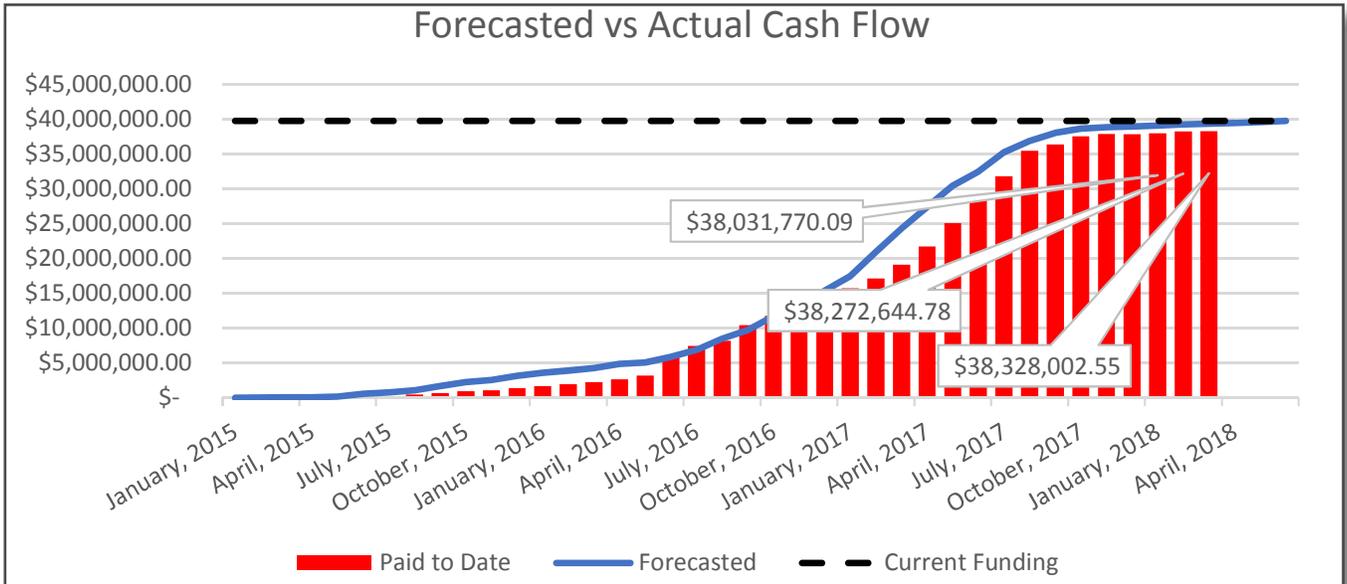
- The two new school projects are in closeout
- Expenditures during this quarter exceeded one million dollars
- 87% of current funding has been committed
- 84% of current funding has been spent
- Several projects are preparing for construction during summer 2018.
- Bolton Primary School
  - Interior renovations, lighting upgrades, secure entry and office remodel
- Boeckman Creek Primary School
  - Classroom and porch improvements, lighting upgrades, fire sprinkler replacement, carpet replacement, secure entry, and office remodel
- West Linn and Wilsonville High School
  - Baseball field synthetic turf replacement
- Wood Middle School
  - Football field synthetic turf and lighting upgrade funded by construction excise tax receipts
- Cedarok Park Primary, Rosemont Ridge Middle, Stafford Primary, Willamette Primary and Wood Middle
  - Energy efficient lighting upgrade at seven gyms

	Original Funding	Approved Changes	Current Funding	Current Commitments	Paid to Date	Estimate At Completion	Forecasted Over/(Under)
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Subtotals	14,405,901.02	-13,952,881.78	453,019.24	257,464.42	257,464.42	453,019.24	0.00
Grand Totals	98,905,901.02	0.00	98,905,901.02	86,285,058.43	83,695,872.23	98,905,901.02	0.00

\*Includes \$4,505,000.00 in as-yet unsold bonds.

# MERIDIAN CREEK MIDDLE SCHOOL

Q1 2018



	2014		2015								2016								2017							
	Q4		Q1		Q2		Q3		Q4		Q1		Q2		Q3		Q4		Q1		Q2		Q3		Q4	
	N	D	J	F	M	A	M	J	J	A	S	O	N	D	J	F	M	A	M	J	J	A	S	O	N	D
Design	▶ PLANNED																									
	▶ ACTUAL																									
Permit	▶ PLANNED																									
	▶ ACTUAL																									
Construct	▶ PLANNED																									
	▶ ACTUAL																									

**Recent Activities:**

- The project is in closeout

**Upcoming Activities:**

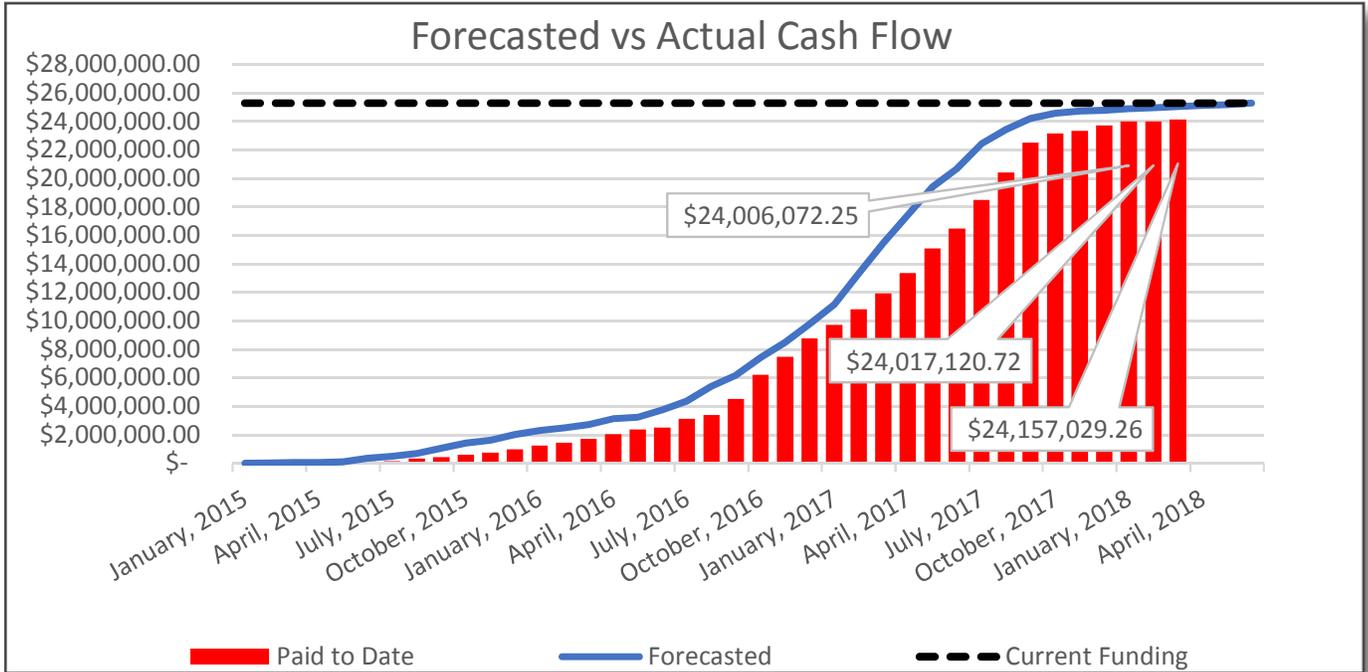
- Completion of punch list scope
- Completion of closeout documentation

NEW MIDDLE SCHOOL IN WILSONVILLE  
Q1 2018



# SUNSET PRIMARY SCHOOL REPLACEMENT

## Q1 2018



	2014				2015				2016				2017													
	Q4	Q1	Q2	Q3	Q4	Q1	Q2	Q3	Q4	Q1	Q2	Q3	Q4													
	N	D	J	F	M	A	M	J	J	A	S	O	N	D	J	F	M	A	M	J	J	A	S	O	N	D
Design	PLANNED																									
	ACTUAL																									
Permit	PLANNED																									
	ACTUAL																									
Construct													PLANNED													
													ACTUAL													

**Recent Activities:**

- The project is in closeout

**Upcoming Activities:**

- Completion of punchlist scope
- Completion of closeout documentation

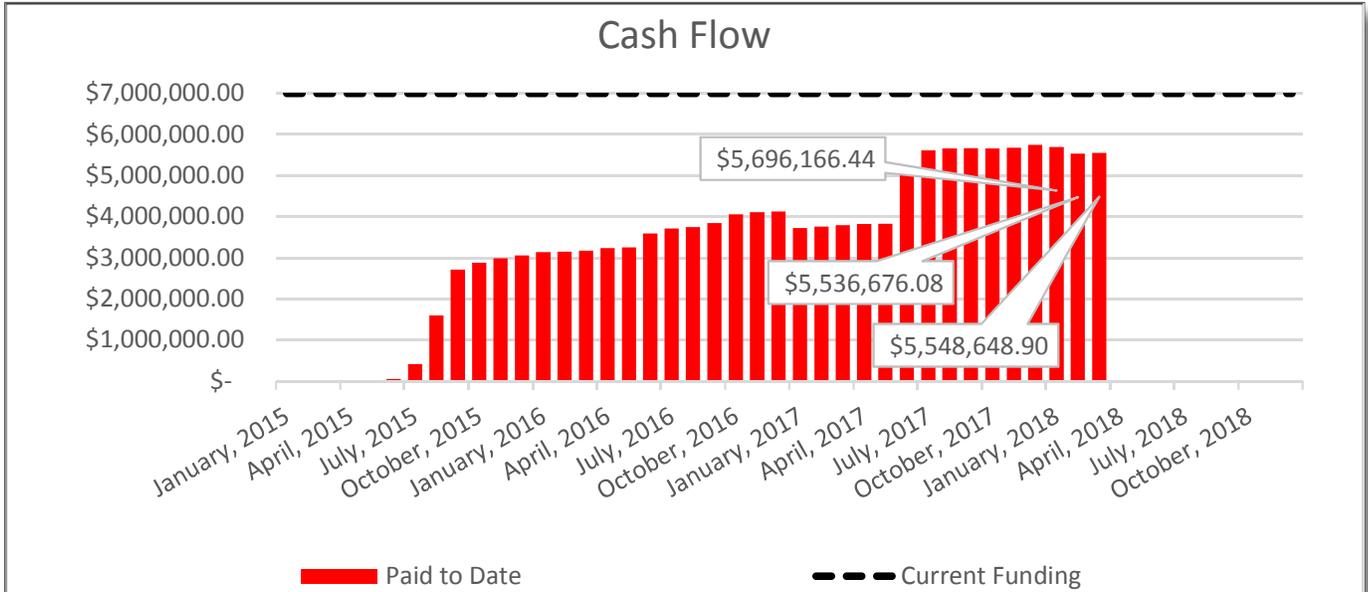
# SUNSET PRIMARY SCHOOL REPLACEMENT

Q1 2018



# LEARNING WITH TECHNOLOGY

Q1 2018



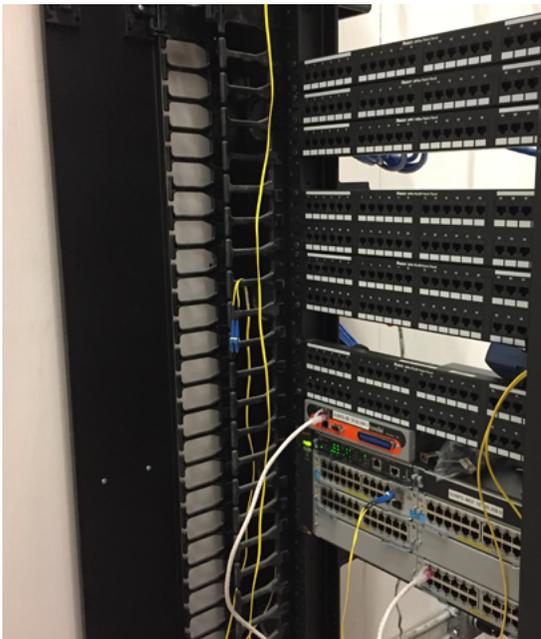
The second major wave of student device updates was completed in the summer of 2017, increasing device accessibility at all schools and replacing some aging devices. Building wiring upgrades and installation of additional wireless access points were also completed strengthening the backbone of the IT infrastructure. E-rate reimbursements for purchases made last summer have come in, causing a net reduction in spending.

#### Recent Activities:

- Plan for next rollout
- Device and infrastructure purchases as needed

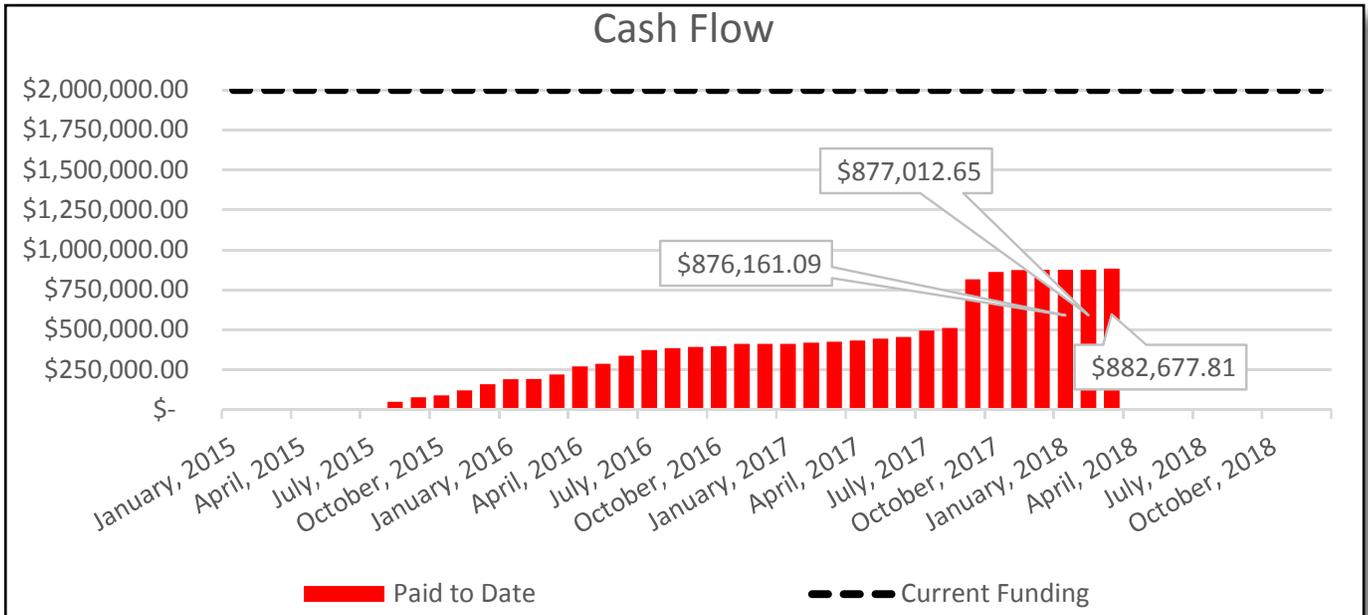
#### Upcoming Activities:

- Plan for next rollout
- Device and infrastructure purchases as needed



# SAFETY & SECURITY

Q1 2018



West Linn-Wilsonville School District is committed to creating and maintaining safe, secure facilities for students, staff and patrons as a partnership with our community, neighboring school districts, area law enforcement and emergency responders. Our schools have been assessed for safety related corrections and has identified the following specific improvements for each unique school facility.

- Building Communication Systems
- School Entrance Security
- Door Hardware and Locking
- Safe Classroom Accommodations
- School-grounds Exterior Security Measures
- Limited Video Surveillance
- Lighting and Controls

**Recent Activities:**

- Boeckman Primary secure entry bid and under contract
- Bolton Primary secure entry out for bid
- Preparation for select camera installation at WHS, WLHS
- Coordinate procurement of emergency radio system

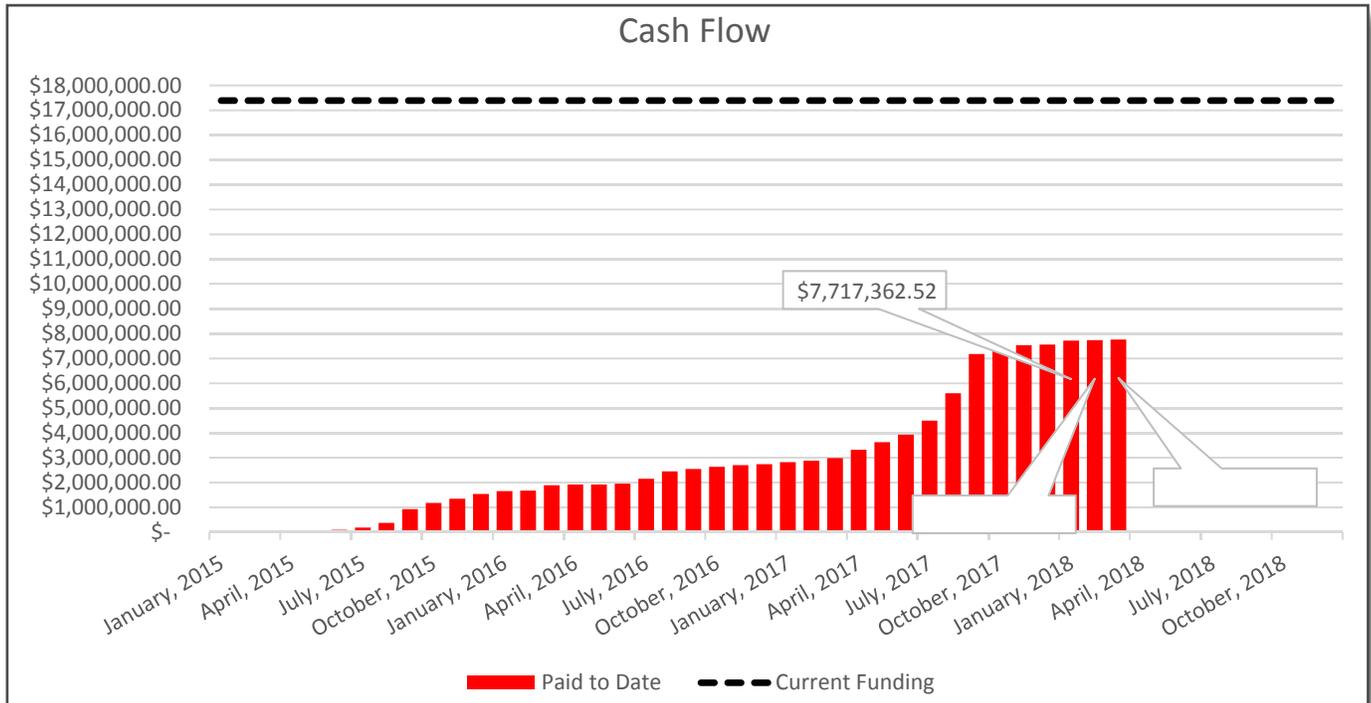
**Upcoming Activities:**

- Prepare for Boeckman Primary secure entry
- Prepare for Bolton Primary secure entry
- Camera installation at WHS, WLHS
- Emergency radio system installation
- Continue creation and implementation of district-wide safety plan
- Continue review of Federal and State law and policy around school safety



# DISTRICT-WIDE IMPROVEMENTS

Q1 2018



This category of projects represents work at all district sites that has been identified over time as improvements that respond to life-cycle replacement, upgrades required by code, changes in instructional models, growth in activity participation and obsolescence. Active and upcoming projects under this bond component will be listed below.

## **16024 – Renovation @ B0**

### **Project Status:**

This project includes interior renovation, lighting upgrades, secure entry and office remodel. Project has been advertised and bids are scheduled to be received April 5, 2018.

## **16025 – Renovation @ BC**

### **Project Status:**

This project includes classroom and porch improvements, lighting upgrades, fire sprinkler replacement, carpet replacement, secure entry, and office remodel. Bids were received March 15, 2018 and a recommendation will be brought to the School Board April 2, 2018. Construction scheduled for summer 2018.

## **16047 – Synthetic Baseball Turf @ WHS, WLHS**

### **Project Status:**

This project includes the replacement of the existing baseball field synthetic turf at the high schools. One field at West Linn High School and two at Wilsonville High School. The project was bid and awarded, the contractor is preparing for summer construction.

## **17031 – Lighting Replacement @ D-W**

### **Project Status:**

This project includes energy efficient lighting replacements at several schools across the school district. The emphasis is on replacing outdated and inefficient gymnasium and commons lighting with new LED fixtures which have proven successful at the high schools. Bids were received February 15, 2018 and a recommendation will be brought to the School Board April 2, 2018. Scheduled for completion summer 2018.

## **17050 – Football Field Replacement @ WD**

### **Project Status:**

This project includes rebuilding the existing football field at Wood Middle School to include synthetic turf and field lights. This project will go out for bid in April and is intended construction during summer 2018.

# CONSTRUCTION TERMINOLOGY

Q1 2018

## **Design Phases:**

Education Specification Group Planning: This phase involves activities that focus on research and preliminary concept studies to develop a course for the project design to follow. Examples of activities include the Design Team developing an understanding of the District and needs of the project through:

Confirmation of existing conditions, preliminary concepts and visioning, Lessons learned, and refinement of project scope, space requirements, schedule and budgets.

The role of the Ed Spec Group is to provide input to the Design and Management Team during early Design phases on projects that involve significant changes to the existing facilities or are new construction. The Group is made up of both internal and external stakeholders such as Teachers, Parents, and community members.

Schematic Design (SD): Schematic Design centers around refinement of design options developed from conceptual ideas into preliminary designs. During SD, preliminary design elements are developed include general building orientation, gross square footage and initial internal configurations, and overall project scope continues to be refined.

Design Development (DD): The firming up of the design takes place during the DD phase. Major systems are thoroughly designed/engineered, internal elevations are developed, coordination between building systems and components are coordinated, major conflicts are identified and resolved, a detail cost estimate is developed, and schedule evaluations are conducted.

Construction Documents (CD): The purpose of CDs is to finalize all the technical aspects of the design. Major design changes should be complete at this point and the Design Team should be focused on the details in order to ensure conflicts in the design are resolved before the project is put out for public bidding.

## **Contractor Selection Methods:**

Prequalification: Qualifications based selection is a method that allows a public agency to pre-select qualified contractors that will be allowed to participate in the competitive bidding process for a project. A qualifications based process will provide a select pool of bidders that demonstrate all the key qualities the District feels are critical to a successful contractor, such a K-12 experience, knowledgeable and skilled site staff and solid background in working on intricate and complex projects. This pool of bidders would then compete in a traditional bid process to select the firm to build the project.

Design-Bid-Build: The preferred procurement method of the District is a traditional method to select a general contractor. The contractor with the lowest complete bid will be awarded the project.

## **Permit Phases:**

Permitting: The permitting phase of a project begins early in the project design and continues into construction.

Land Use Process: Major developments must go through a land use process. This phase of permitting typically involves a submittal of a planned development to a governing body such as a development review board through a land use or conditional use permit application. During this process the community is encouraged to comment in public session and staff creates recommendations and conditions for the approval.

General Building Permit: Following the land use process, the building permit will include compliance conditions received and accepted during land use process. The building design is reviewed for compliance with city building code and a permit is issued when comments have been addressed and the design approved.



## West Linn – Wilsonville Schools

**Long Range Planning Committee Meeting**  
**Administration Building**  
**22210 SW Stafford Rd, Tualatin, OR 97062**  
**Wednesday, April 18, 2018 6:00 PM**

### **Bond Oversight Committee**

1. 1<sup>st</sup> Quarter 2017 Bond Report (information) Handout

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

#### Agenda

1. Call to Order
2. Roll Call 

Mike Jones	Samy Nada
David Lake	
Doris Wehler	Kent Wyatt
Grady Nelson	Chelsea Martin, Board Liaison
3. Member Status review Draft Board memo
4. Re-calibrate School Capacity (continued) (presentation & hand-out)
5. Board Presentation Recommendations Board Meeting 5/7/18
  
6. Next Steps next meeting June 20, 2018

Adjourn



## West Linn – Wilsonville Schools

To: Kathy Ludwig, Superintendent  
School Board

From: Tim Woodley, Director of Operations

Date: May 7, 2018

Subject: **Long Range Planning Committee  
Notice of Vacancy**

As provided in Board Policy BCEA, the Long Range Planning Committee is a Board Appointed group of seven district residents who each serve a 3-year term. The roster on June 30, 2017 consisted of:

Grady Nelson	2018
Mike Jones	2018
David Lake	2018
RB Brandvold	2018 (resigned)
Kent Wyatt	2019
Samy Nada	2019
Doris Wehler	2019

As of July 1<sup>st</sup>, 2018 there are 4 open positions on the Committee. Staff recommends the the Board announce these openings, advertise the positions, receive letters of interest and appoint new members at the June 11<sup>th</sup> Board meeting.

## WEST LINN-WILSONVILLE SCHOOL DISTRICT

# SCHOOL CAPACITY DISCUSSION— SPRING 2018

As the district moves toward an update of the long range plan, an important step is to also update school capacity. At the same time many projects identified in the 2014 bond have been completed that include two new schools and physical changes to existing schools that have direct influence on school capacity. Additionally, since 2013 when school capacity was last calculated, new and/or different programs and curriculum delivery methods have been introduced or changed that also have an effect on school capacity.

Toward that end, the Long Range Planning Committee has, over the last few months, been examining school capacity methodologies in an effort to bring clarity and understanding for how the district should carry out this work and communicate the results to the community.

Embedded in the research is a vast array of terms that various school districts use to describe the capacity of a school, i.e. permanent capacity, educational capacity, student capacity, total occupancy, program target capacity, total available capacity, egress capacity, school size target capacity, enrollment capacity, etc. While the list of terms and definition of each is extensive, for the purpose of this paper the district will simply use the term, "school capacity" which is the optimal number of students any particular school structure or campus can accommodate for the purpose of public education.

### METHODOLOGY

To support the Long Range Planning Committee, staff has conducted research of various school district long range planning documents both locally and across the nation, as well as various articles and papers provided by architectural and school planning groups.

This research has produced two categories of how schools calculate capacity:

1. School capacity based on building and/or classroom area (square feet/student)
2. School capacity based on teaching stations (number of students/instructional space)

Of local area school districts polled, Beaverton, Lake Oswego and Portland Public all use some version of the Building Area Method. Oregon City, Sherwood, North Clackamas, Hillsboro and West Linn-Wilsonville use a version of the Teaching Station Method.

To get a better understanding of how each of these methodologies might be applied, the Long Range Planning Committee chose to examine two close school district methods, each of whom uses different methods to determine school capacity. Those districts are Sherwood School District and Lake Oswego School District because they both operate in similar locations with similar programs and each have very recently updated their capacity numbers to support capital bond programs that have been recently approved.

Lake Oswego School District: Two Building Area Method approaches were used to compare and assess:

- School Classroom Capacity: Total square footage of all teaching stations divided by recommended building area per student

- Building Area Capacity: Total square footage of all spaces within the school divided by recommended building area per student

Discussion: The use of this method requires measuring all instructional spaces in square feet and dividing by an agreed upon number that represents the recommended area per student. At primary level it is a straightforward calculation. At middle and high the number must also consider the fact that all spaces are not used 100% of the day; or there is a utilization factor that must be applied that makes the same accommodation (see "THE NUMBERS" section below). Also note that it is not necessarily recommended to use the Building Area Capacity calculation unless core support space is lacking. In the case of LOSD, they have enough classrooms but found their core facilities in some buildings were deficient.

Sherwood School District: Teaching Station Method is used:

Elementary home room classrooms times (25) students/classroom times utilization rate (1.0). Middle level teaching stations times average class size (30) times utilization rate (0.83). High level teaching stations times average class size (32) times utilization rate (0.80) Note: Some larger areas for PE, band, choir, etc have larger average class sizes.

Discussion: The Teaching Station Method requires an inventory listing of all instructional spaces within a building. It also requires the district to determine the recommended number of students per classroom based on grade level and specific class. Finally, it requires development of a "utilization factor" that recognizes class schedules. (see "THE NUMBERS" section below)

NOTE: To bring deeper understanding, staff interviewed administrators responsible for this work at both Sherwood SD and Lake Oswego SD in March 2018.

## THE NUMBERS

As part of any discussion relating to school capacity, there is a need to understand some variables. These variables are pre-determined numbers that are adopted by the district to represent either existing conditions, preferred outcomes or adopted standards. It is also important to note that none of these variables have national published benchmarks, however, research does provide similar ranges for most public schools.

These variables are:

- Area per student: This number represents the recommended number of square feet of instructional space dedicated for each student. In the most typical situation, a standard classroom is identified and measured as a gross interior number. In some cases, the entire space is then divided by an agreed up number of square feet per student that is inclusive of furniture, built-in casework, equipment and space for the teacher. In some cases, these support items (including the teacher) are granted a number of square feet with the remainder divided between the students. National norms may range from 30 to 50 square feet per student (or more) depending on how the space is allocated. Of course, some spaces that require room for movement (gyms, theater, dance, etc) or room for specialized equipment (science labs, weight rooms, art, band, etc) will require a higher square foot per student variable.

- Students per classroom: Some school districts, for any number of reasons, may have a prescriptive maximum number of students per classroom. Many have a recommended number or even range. The number of students per classroom is also a function of the age of the students (primary, middle, high), the course that is being taught and sometimes a distinction between type of student (pre-school, sp ed., etc.)
- Utilization Rate: This is a number expressed as a percentage or ratio that is most often used to describe the amount of time during a school day when any instructional space is used. In the case of primary schools, the utilization rate is usually 1.00 since every regular classroom functions as a “home room” where instruction happens all day for an identified set of students. At middle and high schools, the school schedule moves students from classroom to classroom throughout the school day. Depending on the schedule, there may be a utilization rate of 0.7 upward. The rate recognizes that not all teaching stations can, or will, be used 100% of the time.

#### PROS & CONS

- Square Foot/Student
  - Pros
    - Easily calculated
    - Easily understood
  - Cons
    - Does not consider student/teacher ratio
    - Requires a variable in calculation to consider class schedule
    - Difficult to consider large spaces like gyms
- Teaching Station
  - Pros
    - Recognizes class size
    - Recognizes implication of class schedules
  - Cons
    - More difficult to explain
    - Requires a variable in calculation to consider educational model

#### QUESTION

West Linn-Wilsonville School District has historically used a version of the Teaching Station Method for calculating school capacity.

Moving forward, what methodology will be used to determine school capacity for WLWV schools?

The Long Range Planning Committee agrees that, regardless of which method the district chooses, it must be accompanied by a clear understanding of how it was developed and what it means.