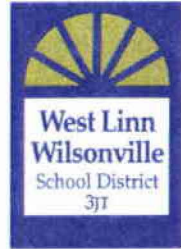


**WEST LINN-WILSONVILLE SCHOOL DISTRICT
LONG RANGE PLANNING COMMITTEE**

P.O. Box 35
West Linn, Oregon 97068
Phone: 503/673-7995
Fax: 503/638-9143



**Long Range Planning Committee
AGENDA
April 28, 2009
Admin Board Room**

Agenda items:

1. Welcome & What's New
2. Bond Web Site Review Cindy Hepting
3. Bond Status Update Design
 Permits
 Advance/Sunset Planning
 Summer 2009 Project Review

Next Meeting Dates:

School Board Meeting: **Monday, May 4, 7:00 PM** at the District Board Room

LRPC Meeting: **Tuesday, May 26, 7:00 PM** at the District Board Room

School Board Meeting: **Monday, June 8, 7:00 PM** at the District Board Room

WEST LINN-WILSONVILLE SCHOOL DISTRICT
2008 BOND PROJECT LOG

Project Number	First Advertised Date	Bid Opening Date	Estimated Completion Date	Project Site	Project Name	Estimated Const Value	Project Status	Contract Strategy
08001.024	11/6/2008	11/20/2008	1/1/2009	DOC	Replace VFD Air Supply	\$3,600	COMPLETE	Tier III purchase
09002.008	3/12/2009	3/26/2009	1/1/2012	AD	Renovation Project @ Admin	\$3,049,200	CONTRACTED	Tier I Bid CMGC
09003.009	4/9/2009	4/23/2009	8/20/2009	BO, BC, WD, WHS, WM DISTRICT	Refinish Gym Floors @ Bolton, Boeckman, Wood, Wilsonville High & Willamette	\$75,600	CONTRACTED	Tier II Bid
09004.009	4/17/2009	5/1/2009	1/1/2010		Vehicle/Equipment Replacement	\$360,000	IN PROCESS	Tier II
09005.009	5/1/2009	5/15/2009		ALL	Flooring Package Districtwide	\$72,000	IN PROCESS	Purchase(s) Cooperative Purchasing Agreement
09006.009	5/6/2009	5/20/2009	8/20/2009	COP BC SU	Tree Removal @ Cedar oak, Boeckman & Sunset	\$72,000	IN DESIGN	Tier II Purchase
09007.019	5/11/2009	5/25/2009	8/20/2008	WHS	Auditorium/Gym Finishes Project @ Wilsonville High School	\$223,200	IN DESIGN	Tier I Bid
09008.009	5/11/2009	5/25/2009	8/20/2008	WLHS WHS WD	Track Resurfacing Project @ West Linn High, Wilsonville High & Wood	\$306,000	IN PROCESS	Cooperative Purchasing Agreement
09009.011	5/18/2009	6/1/2009	11/1/2009	WD	Clerstory-Roofing Project @ Wood	\$496,800	IN DESIGN	Tier I Bid
09010.006	5/20/2009	6/3/2009	8/20/2008	AC	Resurface tennis courts @ Athey	\$28,800	IN PROCESS	Cooperative Purchasing Agreement
09011.009	5/25/2009	6/8/2009	8/20/2008	WHS WLHS	Stainless steel column wraps @ West Linn High & Wilsonville High	\$14,400	IN PROCESS	Tier II Purchase
09012.001	5/25/2009	6/8/2009	8/20/2008	WLHS	Install weight room flooring @ West Linn High School	\$21,600	IN PROCESS	Tier II Purchase
09013.003	5/26/2009	6/9/2009	8/20/2008	CO	New Parking Lot Project @ Cedar oak Park	\$288,000	IN DESIGN	Tier I Bid
09014.009	5/26/2009	6/9/2009	8/20/2008	SU BO	Site Paving @ Sunset & Bolton	\$86,400	IN DESIGN	Tier II Bid
09015.003	5/26/2009	6/9/2009	8/20/2008	CO	New Tennis Court @ Cedar oak Park	\$58,500	IN PROCESS	Cooperative Purchasing Agreement
09016.009	5/27/2009	6/10/2009		RR, WHS	Softball/Tennis Improvement Project @ Wilsonville High & Rosemont Ridge	\$1,080,000	IN DESIGN	Tier I Bid
09017.017	5/28/2009	6/11/2009	8/20/2008	BC	Gym Finish Replacement @ Boeckman Creek	\$9,000	IN DESIGN	Tier II Purchase
09018.011	5/28/2009	6/11/2009	8/20/2008	IWD	New Cafeteria Tables @ Wood	\$21,600	IN PROCESS	Tier II Purchase
09019.009	5/28/2009	6/11/2009		WLHS, WM	Roof Maintenance Project @ West Linn High & Willamette	\$75,600	IN DESIGN	Tier II Bid
09020.009	6/2/2009	6/16/2009	8/20/2008	AC RR WHS	Mechanical-Electrical Upgrades @ Athey, Rosemont & Wilsonville High	\$733,500	IN DESIGN	Tier I Bid
09021.009	6/3/2009	6/17/2009	8/20/2008	BO COP ST WD SU	2009 Asbestos Abatement Project @ BO, COP, ST, WD & SU	\$135,000	IN DESIGN	Tier I Bid
09022.009	6/9/2009	6/23/2009	8/20/2008	WLHS RR	Entry System Repair @ Rosemont & West Linn High	\$31,500	IN PROCESS	Tier II Negotiated
09023.024	6/9/2009	6/23/2009		DOC	Central Storage & Site Improvements @ District Operations	\$1,512,000	IN DESIGN	Tier I Bid
09024.019	6/10/2009	6/24/2009	8/20/2008	WHS	Athletic Field Lighting Revisions @ Wilsonville High	\$14,400	IN PROCESS	Tier II Negotiated
09025.021	6/11/2009	6/25/2009	8/20/2008	RR	Commons Window Blind Replacement @ Rosemont	\$21,600	IN PROCESS	Tier II Purchase
09026.003	6/2/2009	6/16/2009	8/20/2008	SU	Seismic Upgrade @ Sunset	\$180,000	IN DESIGN	Tier I Bid
09027.004	6/17/2009	7/1/2009	8/20/2008	ST	Replace Septic Pumps @ Stafford	\$72,000	IN DESIGN	Tier II Bid
09028.020	6/19/2009	7/3/2009	8/20/2008	WM	Playground Surfacing Project @ Willamette	\$144,000	IN DESIGN	Tier I Bid
09029.010	6/17/2009	7/1/2009	11/1/2009	CR	Site Improvement Project @ CREST	\$178,200	IN DESIGN	Tier I Bid
09030.003	7/9/2009	7/23/2009	8/20/2008	SU	Site Fencing @ Sunset	\$9,000	IN PROCESS	Tier II Purchase
09031.021	5/1/2010	5/15/2010	8/21/2010	RR	Athletic Turf & Site Improvements @ Rosemont	\$1,440,000	IN DESIGN	Tier I Bid
10032.004	5/1/2010	5/15/2010	7/1/2011	ST	Library Addition & Remodel @ Stafford	\$2,617,200	PENDING	Tier I Bid
10033.002	5/1/2010	5/15/2010	7/2/2011	BO	Interior Remodel @ Bolton	\$3,186,000	PENDING	Tier I Bid
10034.003	5/1/2010	5/15/2010	7/3/2011	COP	Library Addition & Remodel @ Cedar oak Park	\$2,325,600	PENDING	Tier I Bid



West Linn – Wilsonville Schools

MEMO

DATE: April 20, 2009

TO: District Administration
Bond Program Personnel

FROM: Tim K. Woodley, Director of Operations

RE: Bond Purchasing

The District has adopted the following protocol for all bond purchases:

Tier I Bid: Class of work with construction value in excess of \$100,000 requiring formal public bid procedure, including CSI Division 0-16 documentation, public advertisement; Ref. ORS 279C.335(1); 279C.400

Tier II Bid: Class of work with procurement value between \$50,000 and \$99,999 requiring informal bid procedure including published advertisement with short form contract and project description. Ref. ORS 279C.412

Tier II Purchase: Class of work with procurement value between \$5,000 and \$49,999 requiring at least three written quotes based on adequate description of work using short form contract, vendor contract or purchase order. Ref. ORS 279C.414

Tier II Negotiated: Class of work with procurement value between \$5,000 and \$49,999 requiring at least three written statements of qualifications including labor rate schedule to be used for billing. This category shall be used where specific quantities and/or design require technical definition from a contractor. A not-to-exceed amount shall be determined prior to contract execution using short form contract, vendor contract or purchase order. Ref. ORS 279C.414

Cooperative Purchasing Agreements: Class of work where an existing bonafide Cooperative Purchasing Agreement exists. A true copy of the Agreement shall accompany each purchase order. Ref. OAR 137-047-0290; ORS 279A.200

Tier III Purchase: Direct procurement with a value under \$5,000 per ORS 279C.335(c)

All 2008 Capital Bond work will be paid using current Prevailing Wage Rates (BOLI)

Department of Operations

Mail: P.O. Box 35 • West Linn, Oregon 97068 • 503-673-7995 Fax 503-638-9143 • www.wlww.k12.or.us
Location: 2755 SW Borland Road, Tualatin, Oregon 97062



WEST LINN-WILSONVILLE SCHOOL DISTRICT

DEPARTMENT OF OPERATIONS

2755 SW Borland Rd. – Tualatin, OR 97062

(P.O. Box 35, West Linn, Oregon 97068)

Phone: 503/673-7995

Fax: 503/638-9143

Operations Department Annual Report 2008-2009

Tim K. Woodley, OPS Service Director

Pat McGough, Facility Service Manager

Mark Law, Custodial Service Manager

Cindy Hepting, Community Service Program Coordinator

Cynthia Abel, Food Service Manager



OPS DIRECTOR REPORT

Tim Woodley

This was an extraordinary year, by all standards. Passing a Local Option AND a \$98-million Capital Bond is a fete most school districts only whisper about as "an option." With strong, focused direction and support from our School Board, endless energy from our volunteer campaign committee, and unyielding expectations from the community, WLWV today enjoys added financial support for both general operations and capital stewardship.

And talk about "just-in-time" delivery; the financial downturn of 08-09 continues to wreak havoc on state school revenue. While WLWV will assuredly share in the pain, the local option and bond position us in a very different place than most.

It also snowed. Oi vey, did it snow! I live 11-minutes from my desk; one of those "snow days" it took me 4½ hours to get home just in time to see the power go out and stay out until late Christmas Day! There was a

*"This year stuff broke, grew, and got dirty. We fixed it, cut it and cleaned it. Overall I think we got a B+"
pm*

point about 3-hours into this commute when I would have gladly focused all \$98m on another bridge over the Willamette River.

So it snowed on Monday (no school) and of course we spent the day preparing for school the next day. This meant moving snow, fixing pipes, heating buildings, adjusting community use schedules, and stock-piling food for 5,000 kids. Then it snowed on Tuesday (no school) and of course we spent the day preparing for school the next day. This meant moving snow, fixing pipes, heating buildings, adjusting community use schedules, and stock-piling food for 10,000 kids. Then it snowed on Wednesday (no school) and of course we spent the day preparing for school the next day. This meant... do you see a pattern here? By Friday, we were exhausted but the buildings and operations were ready for school; but now it was Christmas Break and moving snow, fixing pipes, heating buildings, adjusting community use schedules, and stock-piling food for 25,000 kids didn't really matter any more. However, the local Food Banks were extremely thankful for our generous contribution.

Since the snow melted (with a significant amount of it ending up in the basement of WLHS), District Operations has recreated itself as a lean capital bond management machine. When most school districts pass a large school bond they hire a construction management firm to shoulder the added work while operations continue in a normal fashion. Unfortunately, this usually ends up feeling like "the bond happened to us, instead of with us." Our plan is different as outlined in the attached Management Letter (ATTACHMENT 'A') prepared earlier this spring. In essence, I firmly believe that bond work should be incorporated into everything we do and that the people that manage district facilities are best positioned to manage the 2008 Capital Bond.

This has also been a season of innovation driven by technology. While it may seem a small thing, my iPhone has changed my life, and with it a whole new way of communicating and organizing my work. Here is a real-life example: I was at the regular Monday morning Superintendent meeting when quietly informed that I had an email. Without interrupting the meeting, I open the email, read a short note from an engineer, open a civil engineering design drawing, review a few details, make quick comments on the drawing and returned it to the engineer. He immediately receives and continues design on the Cedaroak Parking lot project. This all took 3-minutes or less. I was

not inconvenienced and the project moves forward. In the old days, this interaction would have had to wait for a scheduled meeting that would probably only occur weekly. This sequence is repeated scores of times daily. What used to take days, now takes minutes using real-time photos, pdfs, word docs, internet connections, downloads, shared calendars, iphone applications, weather updates, satellite imaging, email, go-to meetings, interactive mapping, GIS, Google earth and many, many other quality tools.

Paper-less is becoming factual as our office, in coordination with design, construction, and permitting partners; move documents electronically. The printer is rarely used and the copier's primary purpose is to scan, distribute and file electronically. Even our partnership with our printing company, which used to consist of the architect sending hardcopy drawings to be reproduced by the ream and physically shipped to users, now consists of electronic interaction between designer, owner and contractors that can access information immediately via pre-set linking arrangements through virtual plan centers; all the time keeping track of who has what and when. All district records are being migrated to digital cds that include existing "as-built" plans and specs as well as new drawings and product information that is accessed using hyperlinks that can take maintenance personnel, on a computer at the Operations Center, from a drawing to a manufacturer's website catalog where information is available of the most detailed component; and the ability to purchase the part and have it delivered in 2-days. This is how we do more with less; faster, with more accuracy than ever before.

Our bond web-site is also a good example of how technology is bringing transparency and integrity to the district bond program. Two-way communication through the web-site is bringing real answers to real people every day, with example after example where our community is engaging with us around questions that affect their life today. We know that for the website to be useful into the future, we need to actively manage and interact with it every day. Our goal is to create an accurate "story" of the bond program by posting photos, meeting minutes, schedules, budgets, technical documents and other project related information as it becomes available in a way that is easy and interesting to find. Our latest initiative on the website is to create an interactive spreadsheet titled "Invitation to Bid" that allows contractors and vendors to access our planned projects in

real time such that they can see what is planned, when, the type of work, where it will be constructed, who is managing it and how to bid; with enough information to see minute detail of plans and specs. To make sure we get attention from the bidding community we are running quarterly ads in the Spokesman and Tidings, informing people of our website and how to engage with us; as well as public bid advertisements for individual projects in the Portland Daily Journal of Commerce. Just recently, we distributed 400 postcards to our neighbors in the Erickson and Villebois areas (using snail mail) introducing the new bond website and suggesting they track information using this useful tool.

Finally, the bond management team conducted extensive research prior to purchasing electronic construction management software that is web-based, allowing real-time interaction with designers and architects in managing, coordinating, and communicating bond program information. This program, called e-Builder, is tailored toward public capital programs with a robust financial management component as well as modules to create and track schedules, conduct design, coordinate construction, manage public bidding and facilitate work orders. While the system is not quite "live," we have great confidence in our expectations for reporting and managing bond work with the highest level of integrity. The software even has a customized "dash board" that gives an accurate snapshot of all activity in easy to understand graphics. I expect this will be a "regular" attraction for the Board and Long Range Planning Committee as we proceed with the bond.

One obstacle we have encountered has to do with purchasing. The bond provided funding for all kinds of materials, components, fixtures, furnishing and equipment. In "normal" bond cycles, these items would have been incorporated into larger construction projects through specifications developed and enumerated by the architect. Our strategy to disassemble projects into smaller, work order type procurements has caused us to refocus our efforts on the whole notion of purchasing. Larger districts and public entities have full scale purchasing departments that have established protocols for this purpose. We didn't; but we do now. The "bond office" is taking on this responsibility by creating standardized methods, procedures and documents that assure integrity in the purchasing function and allows project managers to streamline their work to get more done. Examples include "boiler-plate" contracts and project documents based on various

classes and types of work; inter and intra-office protocol for contracting and paying; strict division of authority for procurement and electronic document tracking, distribution and archiving. The next board packet contains a recommendation to adopt a purchasing hierarchy that provides very specific instruction based on value of work anticipated (ATTACHMENT 'B'). This effort will serve the whole district well into the future.

Integrity in management is all well and good; but the goal is to build something. And build we will. The bond passed in November. Bonds were sold in February, with real cash available around the first of March. Beginning in April, we are poised to offer over \$15,000,000 (including technology) in construction and procurement to the contracting community with work to start on scores of projects in the following weeks. And this doesn't include the new schools or the major renovation/addition projects which will be offered next spring.

We believe that we are a service organization with the express purpose of creating conditions to successfully educate our community's children.

We also believe we have a stewardship responsibility to the community for the facilities in which public education takes place.
tw

Included at the end of this report is a listing of those projects coming up (ATTACHMENT 'C'). Of course you can also view this on our website at www.bond.wlwg.k12.or.us.

All of the projects listed have been in design and permitting on a fast-track basis over the last few months. Our designers have served with distinction in honoring our interest in engaging staff and community to best inform their design solutions. Many, many meetings have taken place this spring as concepts have been translated into construction documents; always balancing quality, schedules, and budget. By the way, you can see a listing of all meetings on the bond website calendar; it is impressive.

I need to take a moment to thank all the people that have contributed to this work while at the same time attending to the details of teaching kids every day. I also want to thank the principals for their willingness to take on added workloads and over the course of discovery, be willing to adjust

schedules and expectations to the benefit of the district-at-large. Successful design of schools is not easy, nor does it come quickly. One advantage we have of managing the bond in-house is our ability to meter construction over a longer period of time. This allows work to progress in smaller segments with each increment informing the next. Principals have been instrumental in keeping staff and parents informed while suspending certainty about what final outcomes may be. This is not an easy path, but it does produce the highest chance of success.

While it is important to commemorate where we are with the capital bond, with all indications leading me to speculate that we will be successful in keeping our promises to our community, the real work of the Operations Department is in our routine commitment to service: Facility Service, Community Service, and Food Service.

Please find attached individual reports from Pat, Cindy, Cynthia and Mark that provides insight to the past year's experience. These professionals come to work every day ready and well-equipped to handle the million details that allow good education to happen. I want to personally thank them and recognize their efforts.

ATTACHMENT 'A'



2008 Capital Bond Management Plan Spring 2009

Creating a strategy to manage the 2008 Capital Bond Program is a primary responsibility of the District and could be accomplished in a variety of ways. The following guidelines aid this decision:

- Minimize disruption to ongoing district educational and operational programs
- Maximize quality in design and construction
- Capitalize eligible general fund expenditures
- Maximize efficient use of funding
- Schedule projects throughout the calendar year
- Utilize existing, internal resources
- Create opportunities for district staff professional development
- Increase staff ownership of process and outcome
- Maintain the highest integrity in management practice, accountability, and communication
- Develop/adopt leading technological advancements
- Maintain flexibility in leadership
- Cultivate community partnerships
- Personalize service

Management options range from single-source consultant program management services to complete in-house management; with countless variations in between. Given the goals outlined, a true appreciation of district culture, and a clear understanding of the scope of work anticipated, a unique hybrid strategy has been implemented that consists of an organizational structure that maintains district leadership and control, with targeted assistance through purchased services from a variety of sources.

Depending on regional market variations the proposed approach provides a cost savings in excess of \$1.3-million. Further, the proposed strategy contemplates a contracting strategy of over 80 small "work order" type projects valued at \$10,000,000 where the district is positioned to avoid hiring a general contractor, thereby realizing a 10-15% markup savings for this bulk of work. Additional estimated savings is \$1 to 1.5 million. If this work was turned over to a full-service construction management firm, because of the inherent difficulty in coordinating so many small projects in operational schools, they would most likely package the work into a very small number of large projects and bid them to general contractors for summer construction. We will integrate this work into routine daily operations on a year-round basis.

Finally, I believe that any other approach to executing the details of the 2008 bond would seriously compromise many of the stated goals listed above. The approach as described

will take more work from the management team; however, I believe the people selected for this work are well positioned and most willing to take on the formidable challenge.

MANAGEMENT TEAM

Tim Woodley, Director of Operations: Overall management strategy and implementation. Project design oversight and select project management.

Cindy Hepting, Program Coordinator: Internal management practice and system(s) coordination.

Scott Perala, Heery International, Program Manager: Bond program management information control systems, master programs and system/procedure integrity. [Fee-Based; front-loaded with diminishing role]

Amy Berger, Admin Assistant: Document control, team coordination, budget protocol integrity and internal/external communication.

Bob Teters, Private Consultant, Project Manager: Individual project management with focus on technically complex installations (mechanical/electrical/electronic) [Fee-based]

Pat McGough, Facility Manager: Project coordination with ongoing operations as well as small works project management.

Mark Law, Custodial Manager: Project coordination with site-based operations as well as purchasing coordinator for FF&E.

Undesignated, Heery International, Project Manager: Major capital construction management. [Fee-Based; delayed start]