

West Linn / Wilsonville School District
Bond Oversight Committee Meeting



Project: **BOND OVERSIGHT COMMITTEE**

Date: January 13, 2016 – 7:00 PM

Recorded By: Amy Berger

MEETING MINUTES

ATTENDEES

Name

Tim Woodley – District Operations
Kent Wyatt - Member
Doris Wehler - Member
Regan Molatare – Board Liaison
Gretchen Katko - Member, Vice Chair
R.B. Brandvold - Member

Grady Nelson - Member
David Lake – Member, Chair
Amy Berger – District, Bond Office Manager
Remo Douglas – District, Project Manager
Tony Vandenberg, Heery Program Manager
Bill Rhoades – District Superintendent

NEW BUSINESS

Mtg - Item

Discussion / Action Item

- 1.0 The meeting started at 7:10 PM
- 1.2 Tim called the meeting to order looking over the agenda stating that the meeting would focus on the 4th Quarterly Report of 2015.
- 2.0 Bond work through the fall and continuing through winter has been centered on permitting. It has been going well but has been a process to keep on top of. Design has also continued with input from our staff as the architects have been meeting with focus groups to go over specific areas of the schools. Barb Soisson has been acting as planning principal and has been a great asset through this process.
- 2.1 There are two companion article with the agenda. One is about the Beaverton School District experiencing construction escalation. The other from Vancouver going out to bid last summer for a project and not receiving any bids. The market is so saturated right now and prices are escalating.
- 3.0 Capital Bond Project Reports:
 - The program financial summary shows the breakdown for the commitment money as well as money already out the door. The report is currently showing over \$300,000 over what we have in total funding. E-builder is able to show numbers in a planning capacity so we can see where decisions need to be made.
 - The new Middle School budget is recognizing the cost for a 475 student capacity starter school
 - Sunset replacement school is showing cost for a full build of 450 students.
 - The Bond premium has not been allocated to any project at this point. The numbers are simply showing that the premium will be needed to offset the cost of escalation to be able to complete this bond as it was promised.
 - Tony walked through the New Middle School project. Highlights include:
 - Currently being on schedule
 - Ed Spec Work was presented to the school board and positive feedback was received
 - The district received stage 2 land use application completeness.

NEW BUSINESS

Mtg - Item

Discussion / Action Item

- Upcoming activities include continuing design work and beginning contractor selection later in February.
 - Remo walked through the Sunset Primary Project. Highlights include:
 - Currently being a little ahead of design and permitting schedules
 - Ed Spec Work was presented to the school board and positive feedback was received
 - The project has been submitted for land use with the city.
 - Upcoming activities include expecting completeness later this month and submitting a request to the school board to use a qualifications based low bid procurement method for the digital controls package.
 - Tony walked through the WLHS 700 Bldg Project. Highlights include:
 - Currently being on track with spending and schedule
 - The project has received positive feedback on the design
 - The land use application was approved by the city
 - Upcoming will be a final estimate and starting the bid process in February
 - Remo walked through the WHS Performing Arts project. Highlights include:
 - Receiving positive feedback on the design
 - The project has received land use approval from the city
 - Upcoming the project will be going through the building permit process and starting the contractor bid process in February
 - The Technology Project is moving along quickly as Curtis has spent nearly \$3 Million to date updating district-wide technology.
 - The Safety and Security Project included hiring Elert & Associates as a safety consultant. Elert just recently finished a district-wide safety assessment and the district has a copy of the reports. Elert also gave a presentation to the Admin team and School Board.
 - One of the highest levels of priority in all schools is communication.
 - The two new schools will be the pilot programs for some new safety technology which could include cameras and card readers
 - The Districtwide Improvements Project thus far included a shed behind WHS being converted into a robotics garage and a concessions/softball team room building being built at Rosemont Ridge Middle School.
- 4.0 The 4th Quarterly Bond Report has been passed out and the committee is encouraged to review and provide feedback. The report will be presented to the school board at the February 1st Board Meeting.
- 5.0 The meeting adjourned at 8:36 PM

Handouts

No.	Item	Dated
1.	Agenda	January 13, 2016
2.	News Articles about Construction/Market Conditions	
3.	3 rd Quarter Bond Quarterly Report	January 13, 2016



West Linn – Wilsonville Schools

**2014 Bond Oversight Committee Meeting
Administration Building
22210 SW Stafford Rd, Tualatin, OR 97062
January 13, 7:00 PM**

Agenda

1. Call to Order
2. Roll Call:

David Lake, Chair	Gretchen Katko, Vice-Chair
Doris Wehler	Mike Jones
Kent Wyatt	Grady Nelson
R.B. Brandvold	Regan Molatore, Board Member
3. 4th Quarter 2015 Bond Report (Draft) -Review & Project Status Report
4. Board Report [February1, 2019] David Lake
5. Meeting Schedule

a. BOC Report to Board	February 1, 2016
b. LRPC Meeting	March 16, 2016
c. BOC Meeting	April 13, 2016
6. Adjourn

Publication: The Oregonian; Date: Nov 9, 2015; Section: Main; Page: A3

Cost of new schools skyrockets

By Wendy Owen The Oregonian/OregonLive

Beaverton School District expects to tack another \$17.5 million to \$20 million onto the cost of the new high school it's building in South Cooper Mountain, bringing the total as high as \$166 million.

It's the second price jump in six months for the 330,000-square-foot school. Skyrocketing construction costs, additional city requirements and several project additions bolstered the price this time, the district's Bond Accountability Committee learned last week.

The district had already increased the price for the high school to \$129.8 million from the original estimate in 2011 of \$109 million. In May the cost jumped another \$16.5 million to \$146 million because of new transportation fees, enhancements and expensive site work.

But the high school isn't the only project to exceed cost estimates. Of the seven new or rebuilt schools to be constructed with bond funds, all will cost more than the original estimates.

The economic turnaround, demand for construction and general inflation have added millions of dollars to bond projects. Staff project a total cost to complete all of the projects listed on the eight- to-10-year bond to reach \$695 million. Voters passed a \$680 million bond in 2014.

But the economic boon has been good to the district as well. Additional funding through bond sale premiums (\$63 million), interest from the first bond sales (\$5 million) and a collection of other fees (\$2 million) have bolstered the bond funds from \$680 million to \$750 million with no additional taxes needed. The district expects to have \$55 million to spare.

The new high school, on Southwest Scholls Ferry Road and Southwest 175th Avenue, is the largest on the list of bond projects, which includes three new schools, four rebuilt schools, massive renovations of buildings, \$98 million in repairs to schools and \$56 million in updated computers and new classroom technology.

School bond cost changes

Project	Original	Projected
New high school	\$109 million	\$166 million
New middle school	\$51.6 million	\$60 million
New elementary	\$25 million	\$32 million
Vose replacement	\$25 million	\$31 million
Arts and Communication Magnet Academy replacement	\$28 million	\$36 million
Capital Center	\$5 million	\$14 million
Five Oaks renovation	\$21 million	\$26 million

Source: Beaverton School District

No contractors bid on West Barracks

Vancouver must delay project to renovate 4 buildings



(http://media.columbian.com/img/croppedphotos/2015/07/29/0730_met_barracks_1.jpg)

The Infantry Barracks are seen at Fort Vancouver on Thursday March 26, 2015. The city is remodeling four buildings (Infantry Barracks, Quartermaster's Building and Dental Surgeons Building) in Fort Vancouver's West End for commercial, residential, retail and arts use. (Natalie Behring (/staff/natalie-behring/)The Columbian)

By **Amy M.E. Fischer**, Columbian city government reporter

Published: July 29, 2015, 7:23 PM

Renovation of four wooden historic buildings at Fort Vancouver's West Barracks has been delayed a few months because no contractors bid on the project, which was supposed to begin this summer.



A



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The city of Vancouver plans to convert the old Artillery Barracks, Infantry Barracks, Quartermaster Storehouse and Dental Surgeon's Building into residential apartments and space for office, retail and hospitality use. In May, the city sold "mini bonds" to Clark County residents to help pay for the \$8.3 million project, which also is funded with a combination of state grants, revenue generated from operation of Fort Vancouver property, and city bonds.

The city put the renovation project out for bid June 5. Five general contractors attended the mandatory pre-bid meeting in which city staff explained the work involved, said Capital Projects Manager Jon Sears. So, when the bid period closed July 14, city staff members were surprised that no one submitted bids, he said.

To find out why, city staff polled the contractors and the Builder's Exchange of Washington.

They were told that during the Great Recession, many firms went out of business, and now there aren't enough specialty subcontractors, such as those that do roofing and flooring, to meet current construction demands, Sears said. Also, some subcontractors were reluctant to bid on the West Barracks project because they already were busy — in some cases, too busy to return contractors' phone calls — and some couldn't afford additional bonding, he said. (Contractors are required to take out bonds in the event the customer isn't happy with the work performed and must be reimbursed.)

"The reality is construction is really going full bore here right now," Sears said Tuesday, referring to Portland and Vancouver. "There's too much work out there for the contractors to be able to do."

Another explanation for the lack of bids is it's a mid-sized project, which means smaller contractors would have trouble bonding it, but bigger outfits aren't interested, Sears said. Also, because it's an adaptive reuse project of a historic building, the contractor faces greater risks of encountering unforeseen conditions during the project, he said.

The city will advertise the job again Aug. 6 and hopes to open bids Oct. 15. Construction is expected to take one year from when the project is awarded.

In response to some of the feedback from contractors, the city decided to slightly relax some of its requirements for the job, such as not requiring certain supervisors to have as many years of experience. It's eliminated the mandatory pre-bid meeting and will open the West Barracks buildings twice for contractors to walk through during the bidding process.



Amy M.E. Fischer (/staff/amy-me-fischer/)

Columbian city government reporter

☎ 360-735-4508

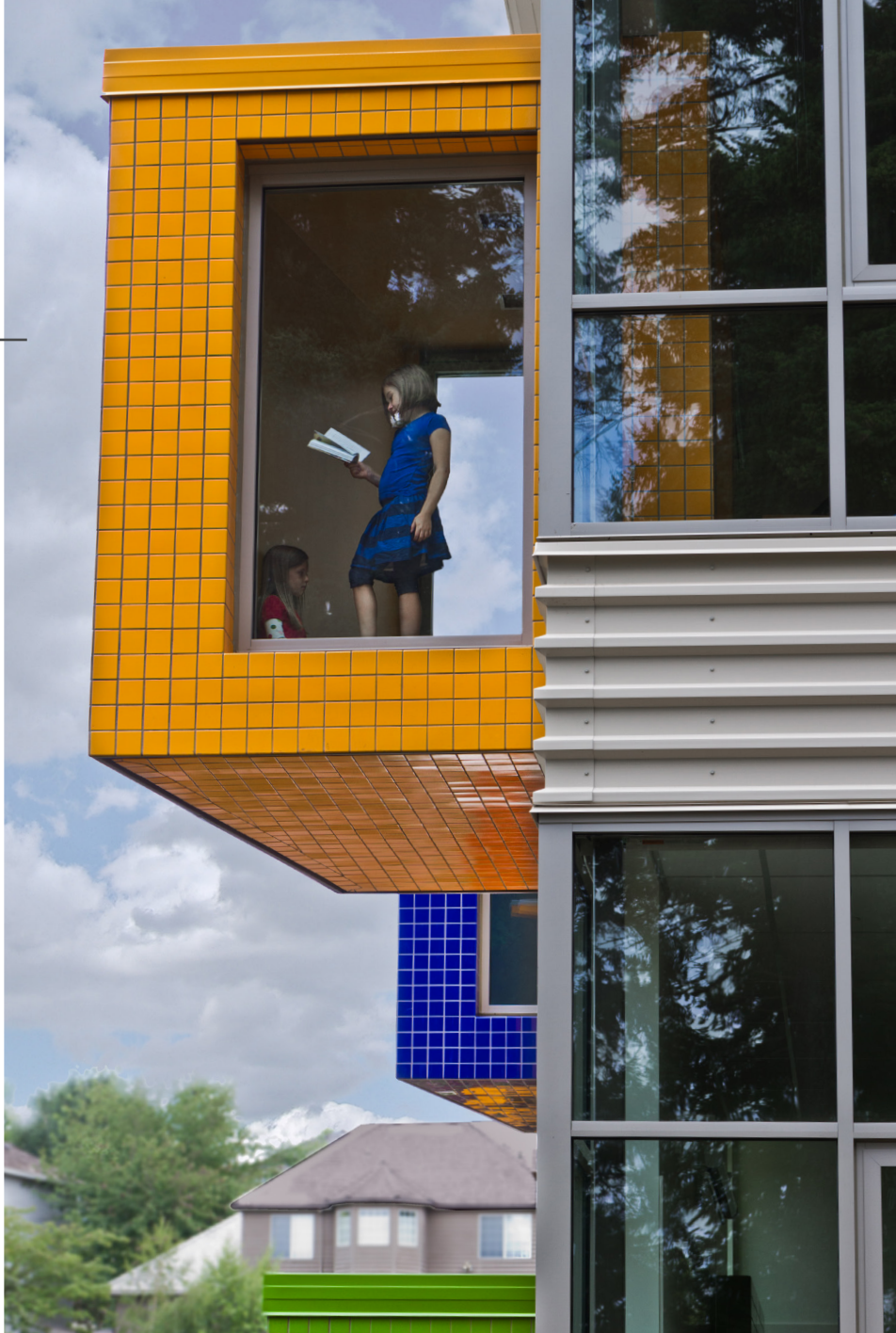
👤 @amymefischer (<https://twitter.com/amymefischer>)

✉ Send an Email (<mailto:amy.fischer@columbian.com>)

More Like This



January 2016



WEST LINN - WILSONVILLE SCHOOL DISTRICT

2014 Capital Bond Program
Quarterly Report

Q4 2015

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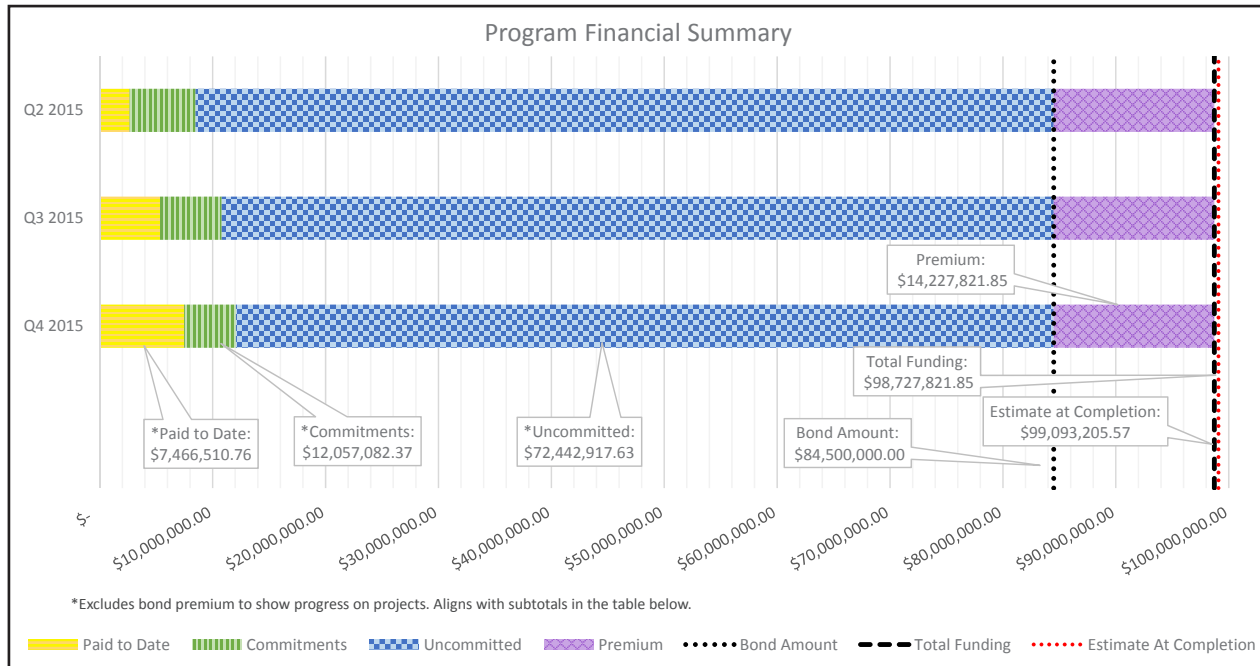
Q4 2015



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PROGRAM SUMMARY

Q4 2015



	Original Funding	Approved Changes	Current Funding	Current Commitments	Actuals Approved	Estimate At Completion	Forecasted Over/(Under)
New Middle School in Wilsonville	40,000,000.00	0.00	40,000,000.00	3,648,424.96	1,336,590.25	48,080,182.08	8,080,182.08
Sunset Primary School Replacement	24,000,000.00	0.00	24,000,000.00	2,508,025.03	953,553.37	29,189,256.71	5,189,256.71
700 Building Renovation & Addition @ WLHS	3,000,000.00	0.00	3,000,000.00	417,103.97	234,953.79	3,841,127.22	841,127.22
Performing Arts Renovation & Addition @ WHS	3,000,000.00	0.00	3,000,000.00	389,900.72	260,288.64	3,225,175.14	225,175.14
Technology @ D-W	7,000,000.00	0.00	7,000,000.00	3,021,139.75	2,995,559.75	7,000,000.00	0.00
Safety & Security @ D-W	500,000.00	0.00	500,000.00	205,304.54	159,076.34	500,000.00	0.00
Improvements @ D-W	7,000,000.00	0.00	7,000,000.00	1,867,183.40	1,526,488.62	7,000,000.00	0.00
Subtotals	84,500,000.00	0.00	84,500,000.00	12,057,082.37	7,466,510.76	98,835,741.15	14,335,741.15
*Bond Premium	14,227,821.85	0.00	14,227,821.85	257,464.42	257,464.42	257,464.42	(13,970,357.43)
Grand Totals	98,727,821.85	0.00	98,727,821.85	12,314,546.79	7,723,975.18	99,093,205.57	365,383.72

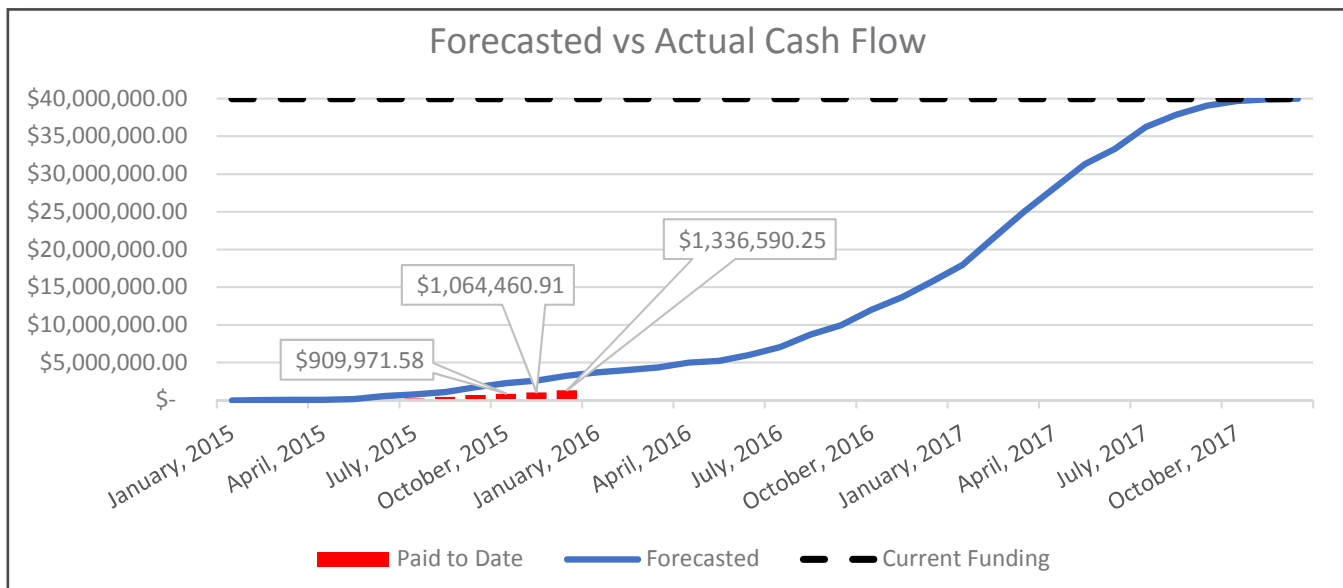
*Includes \$4,505,000.00 in as-yet unsold bonds

- Designs for all four major construction projects are well underway. The first estimate for each of the two new schools has been received. These estimates are based on Schematic Design drawings, which are somewhat conceptual in nature. The second estimate for each of the high school projects has been received. These estimates are based on Design Development drawings which are more refined.
- The Bond Management Team continues to monitor market conditions and assess project scopes in light of estimates. The next series of estimates will be received over the course of January and February. The Estimate at Completion for the program is currently estimated to exceed total funding by \$365,383.72.
- The Estimate at Completion assumes that the projects will be constructed as discussed prior to passage of the bond measure. Specifically, Sunset Primary School being built to the full 450 student capacity, and the new Middle School in Wilsonville opening as a starter school with a 475 student capacity.
- Design Development drawings for Sunset Primary have been received and sent to two separate estimating firms as an added measure to gauge market conditions. This exercise will also be instructive to the District's review of the other projects estimates.



NEW MIDDLE SCHOOL IN WILSONVILLE

Q4 2015



	2014		2015										2016										2017														
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Recent Activities:

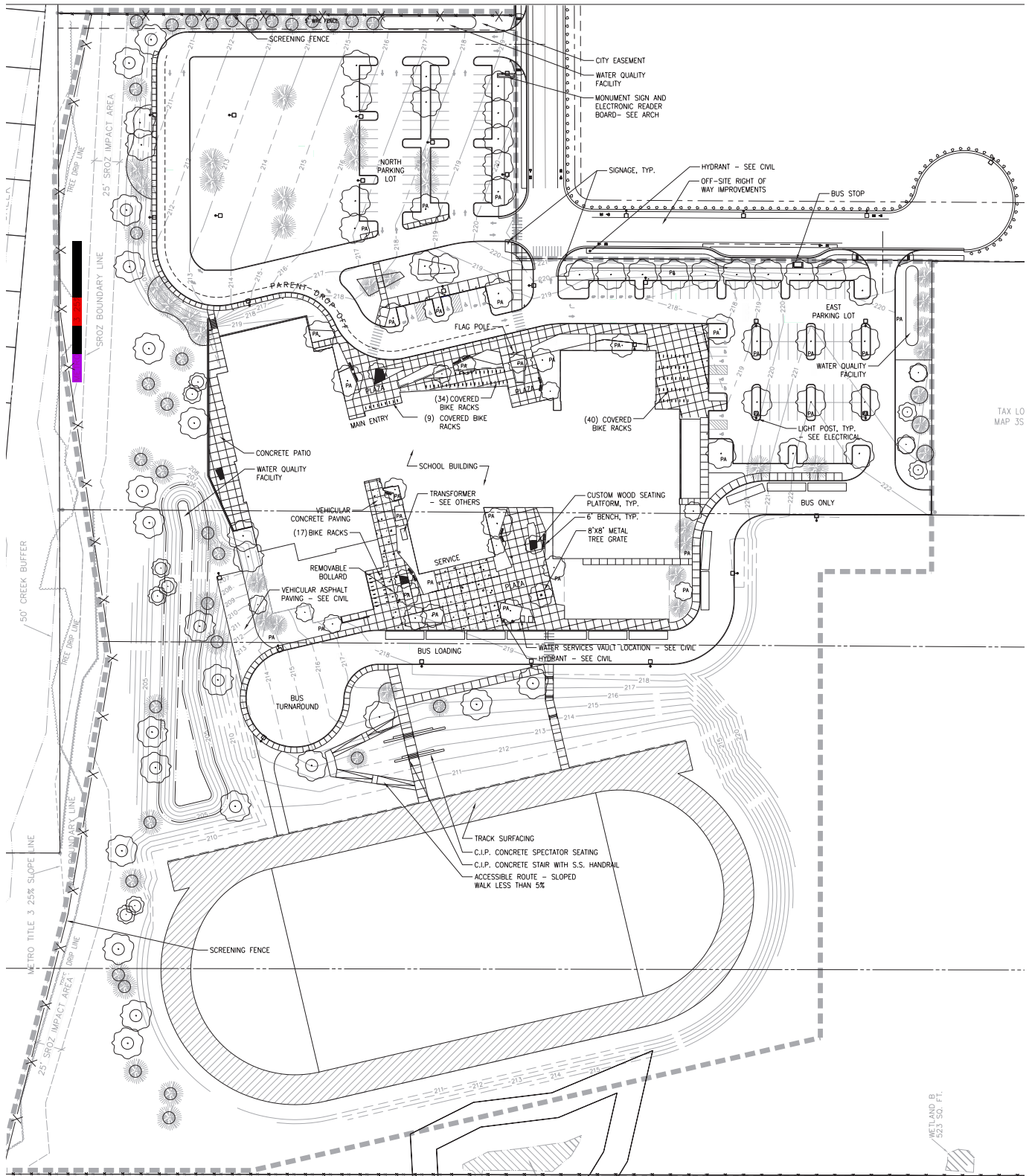
- The Bond Management Team has reviewed the design with the educational specifications group and the Architect presented the project to the School Board on October 19th. Both groups provided positive feedback to the design.
- The School Board approved a resolution for the District to enter into an intergovernmental agreement for the right-of-way work associated with the development of the Middle School.
- The School Board passed a resolution authorizing the use of a qualifications based low-bid procurement method for the general contractor.
- The stage 2 land use application achieved completeness with the City of Wilsonville on January 6, 2016.

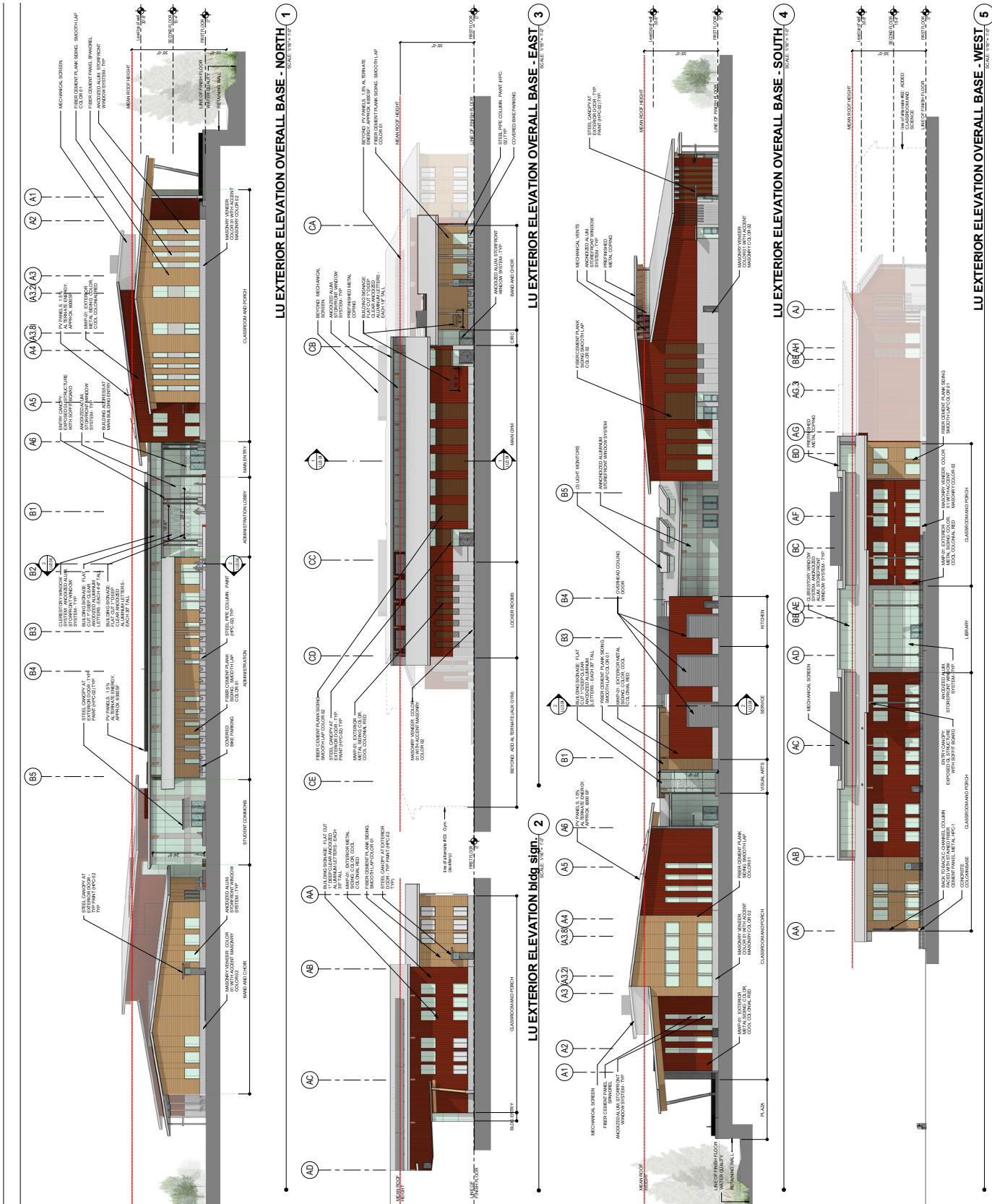
Upcoming Activities:

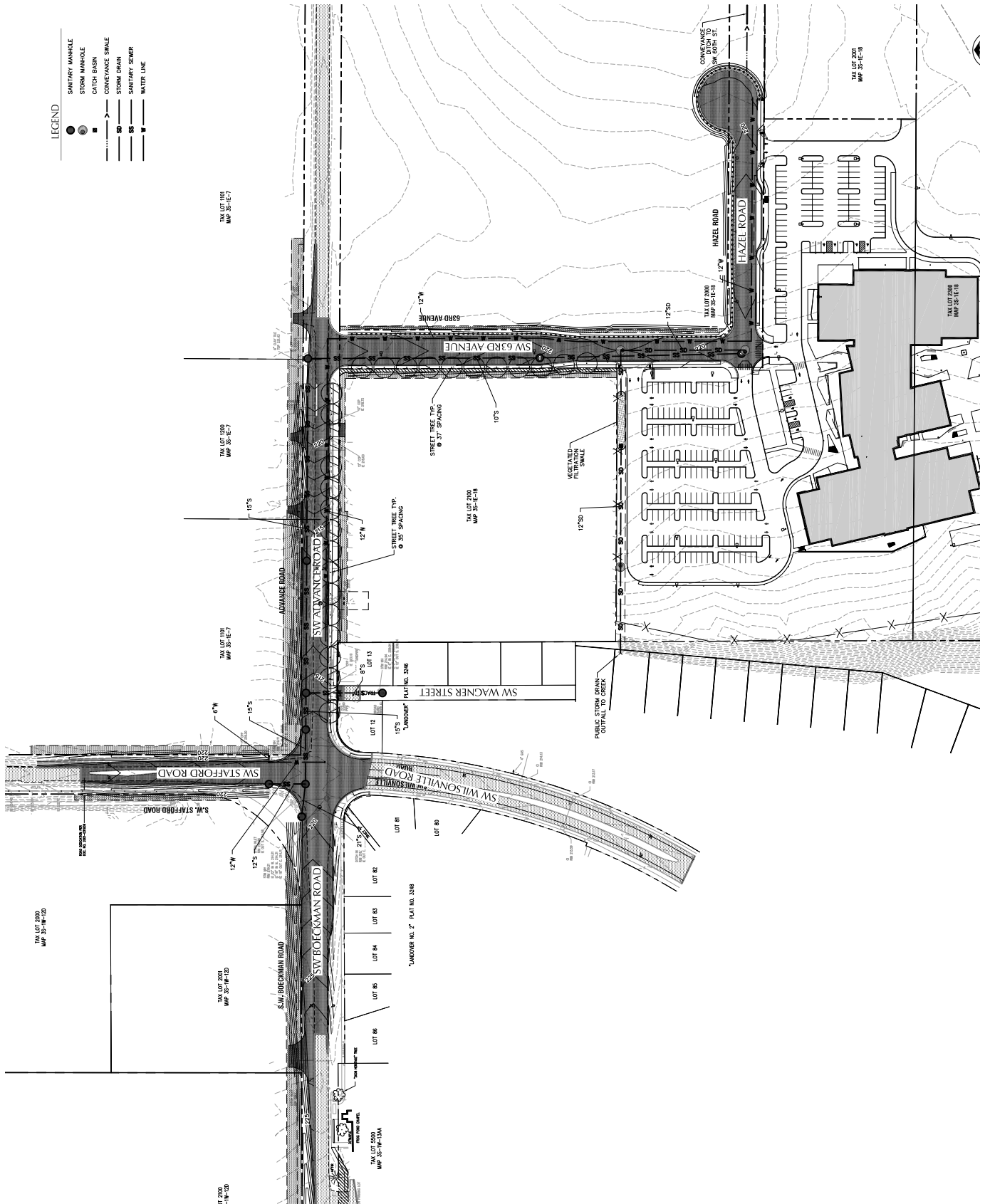
- The base design for the project is a starter middle school as discussed prior to passage of the bond. The starter school will have a 475 student capacity. The District will receive estimates for additive alternate options including a maker space and technology classroom addition, a 250 student classroom addition, and an auxiliary gymnasium addition. It is expected that market conditions will prevent the District from being able to accept multiple alternates, though there may be an opportunity to accept the STEM addition.
- The Bond Management Team continues to explore options for procurement and value engineering for the project.
- The contractor selection process will begin in February.
- A site package including grading, major utilities rough in, and building pad will be submitted for permit in February.
- Design Development for the building is scheduled to be complete in January. A detailed estimate is scheduled to be complete in late February.
- The project team will submit a request to the School Board to use a qualifications based low-bid procurement method for the digital controls package.

NEW MIDDLE SCHOOL IN WILSONVILLE

Q4 2015

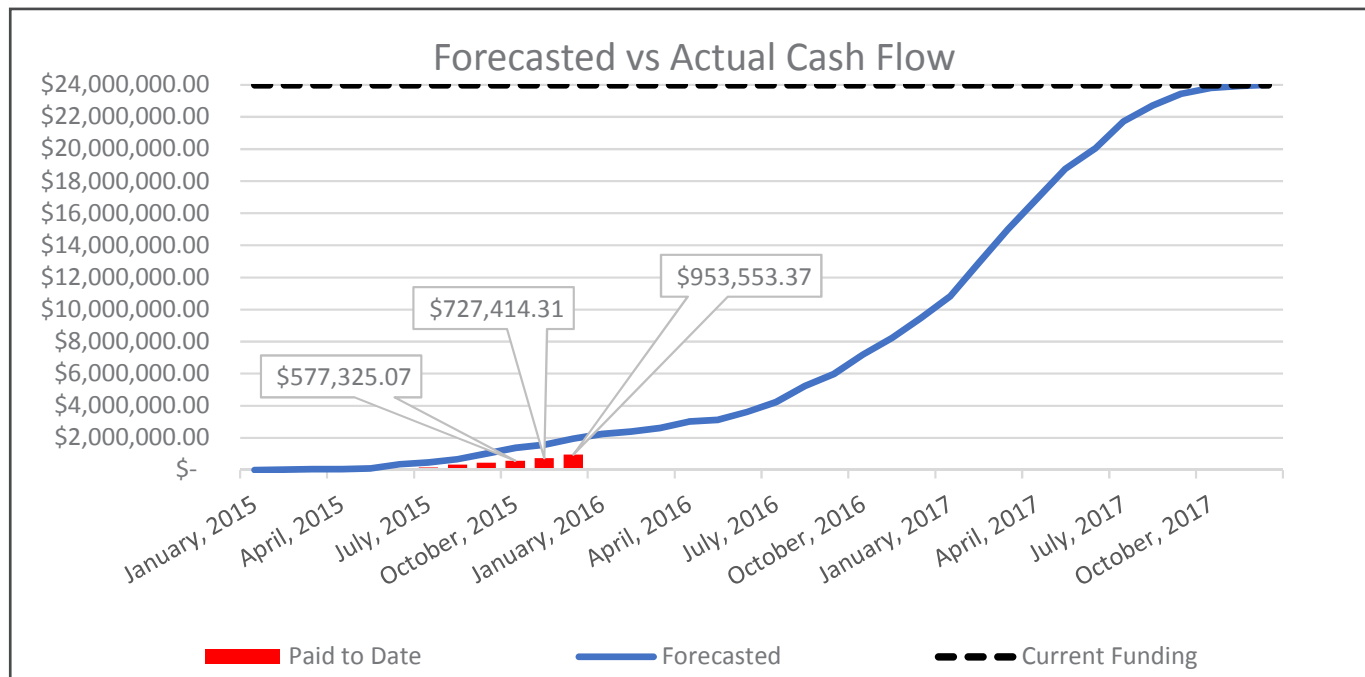






SUNSET PRIMARY SCHOOL REPLACEMENT

Q4 2015



	2014		2015												2016												2017																							
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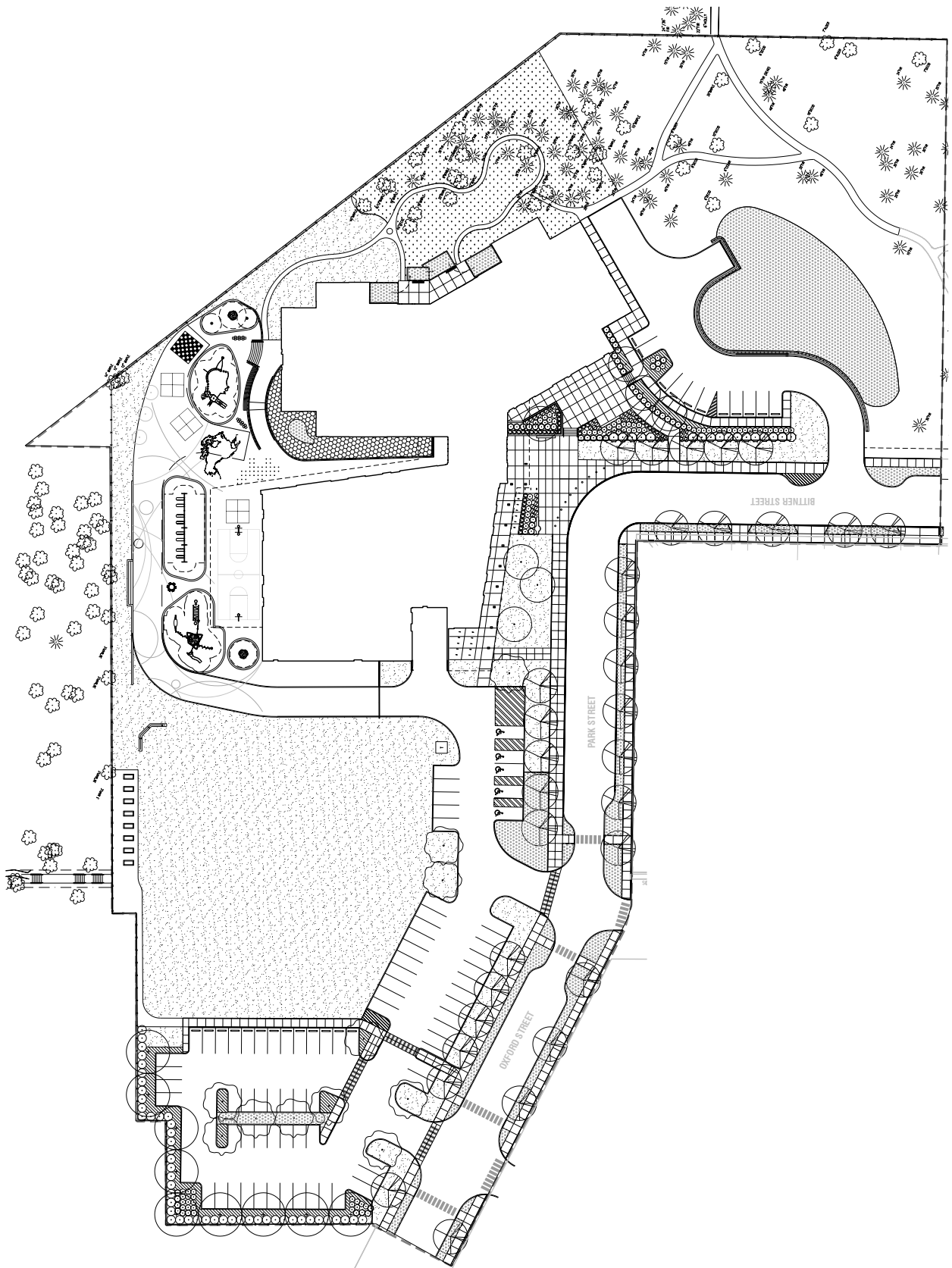
- Design Development drawings have been received and sent to two separate estimating firms as an added measure to gauge market conditions.
- The Bond Management Team has reviewed the design with the educational specifications group and the Architect presented the project to the School Board on October 19th. Both groups provided positive feedback to the design.
- The project team met with the Sunset Neighborhood Association on two occasions. The primary concerns seem to center around the fire access drive on the south side of the building and the associated parking spaces. The proposed design accommodates these concerns to the extent possible within the City of West Linn Development Code.
- The project was submitted for Land Use with the City of West Linn in November.
- The School Board passed a resolution authorizing the use of a qualifications based low-bid procurement method for the general contractor.

Upcoming Activities:

- The Land Use application is expected to achieve completeness in January, starting a several month permit process.
- The project team will submit a request to the School Board to use a qualifications based low-bid procurement method for the digital controls package.

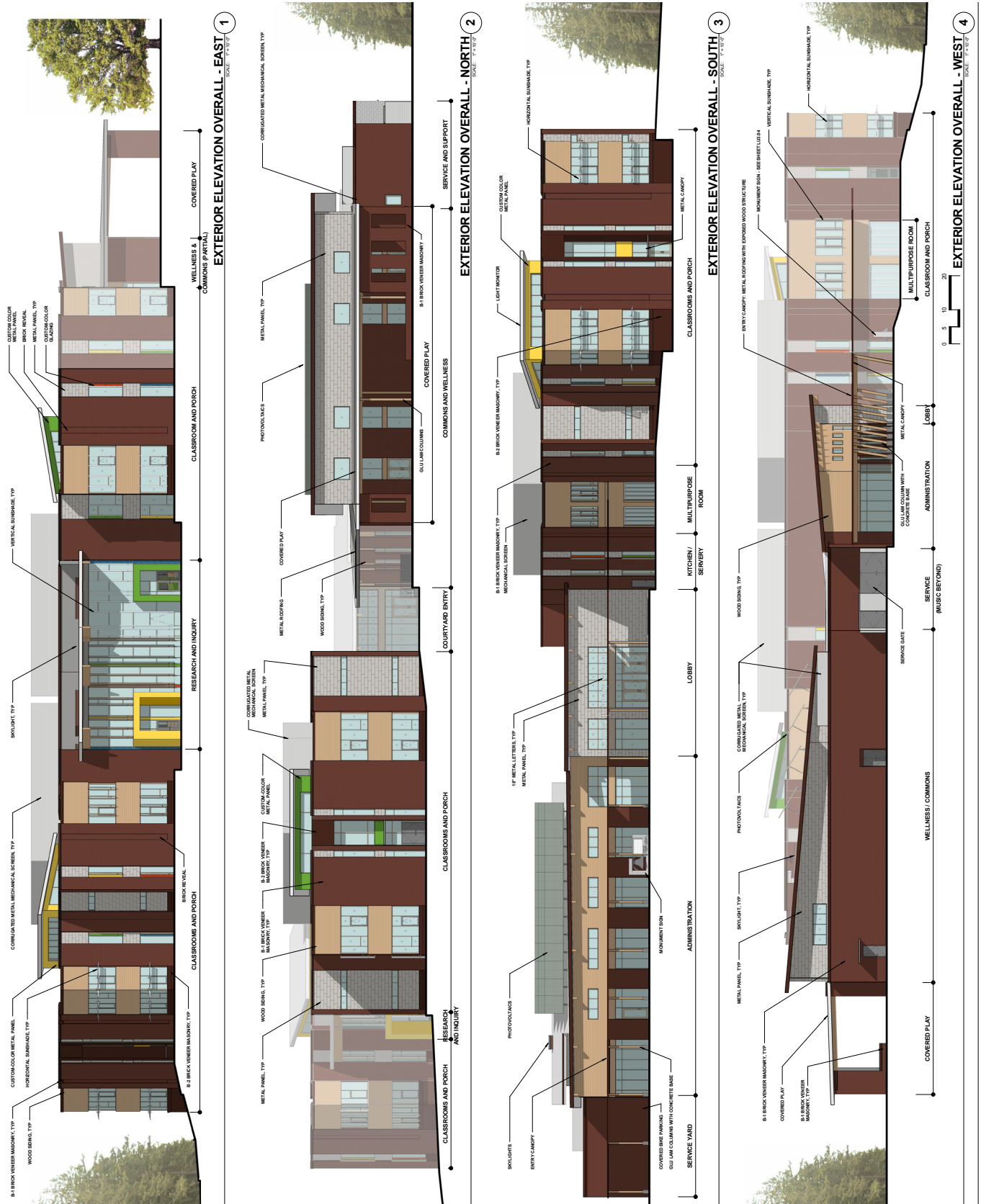
SUNSET PRIMARY SCHOOL REPLACEMENT

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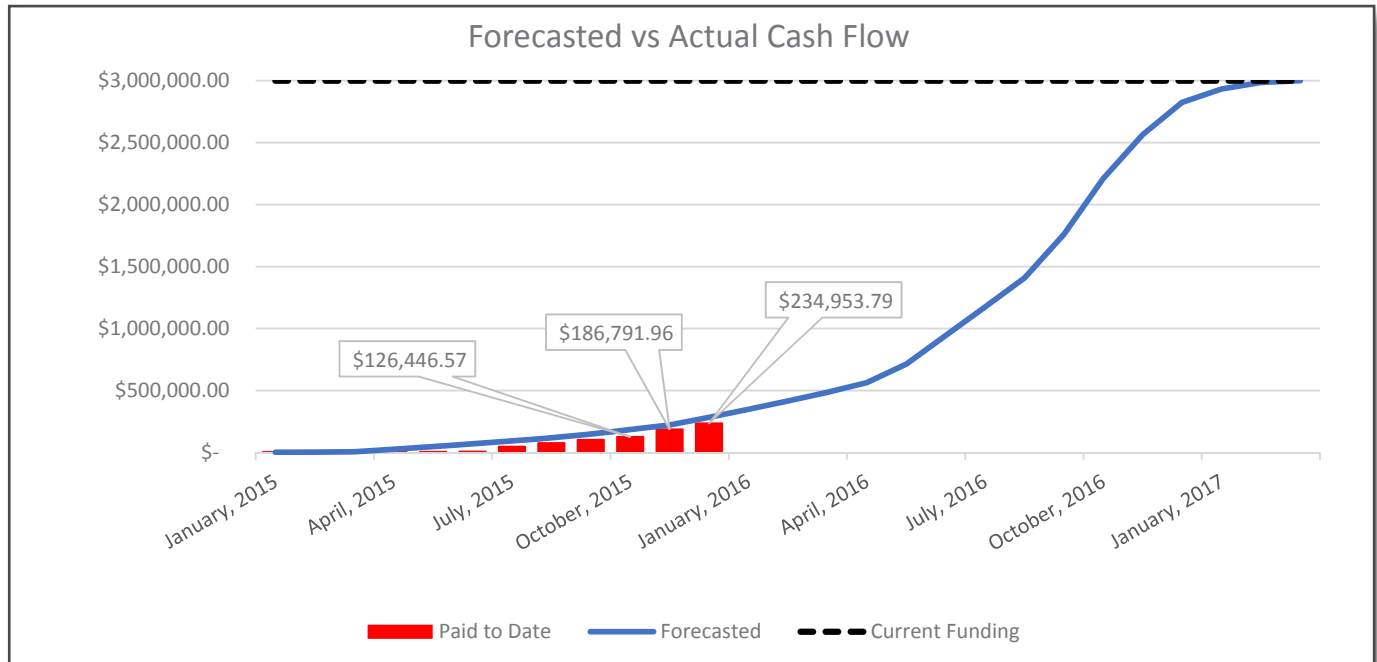
SUNSET PRIMARY SCHOOL REPLACEMENT

Q4 2015



700 BUILDING RENOVATION & ADDITION AT WLHS

Q4 2015



	2014				2015								2016								2017																	
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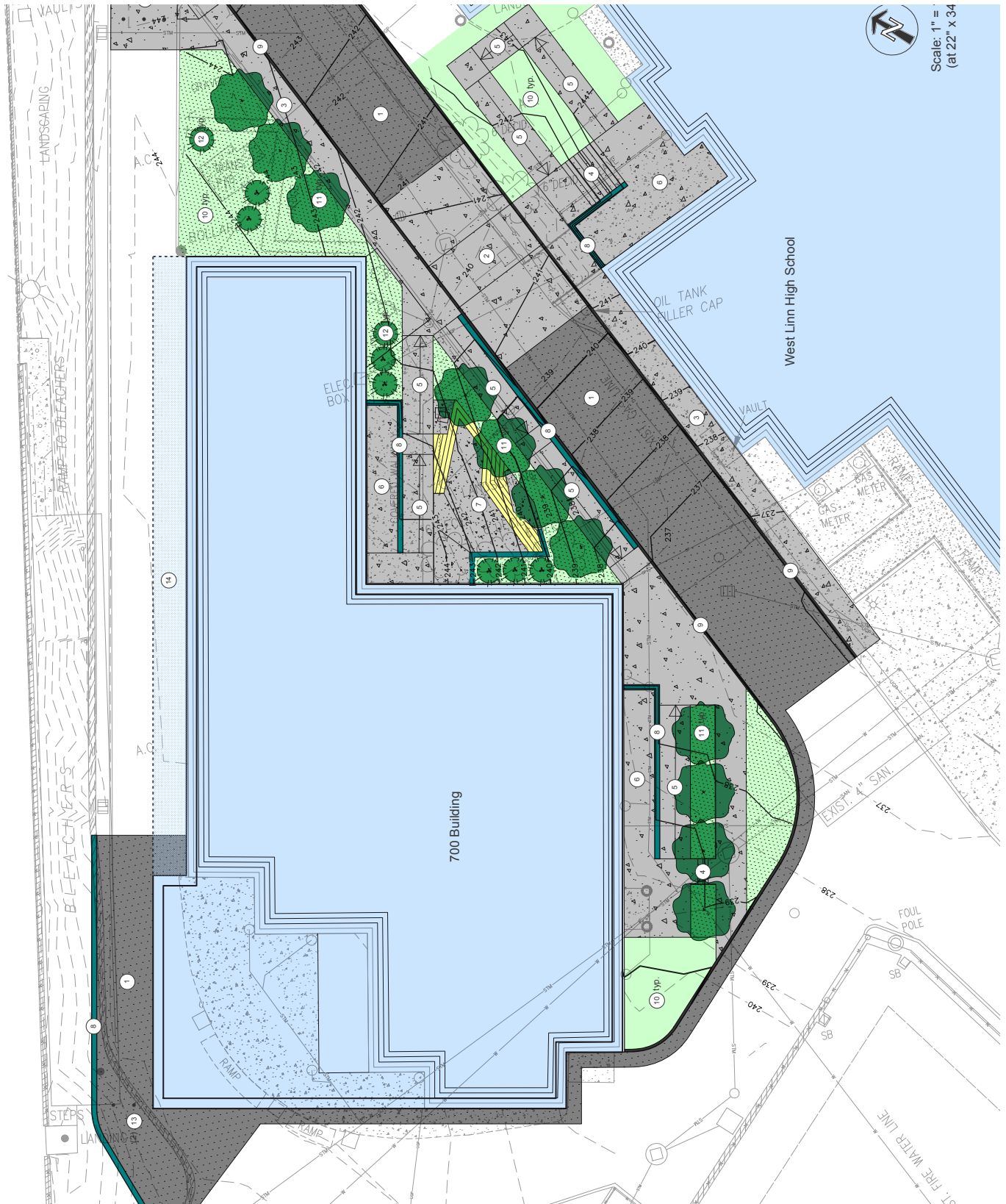
- The design development estimate showed a marked increase in the anticipated cost of construction based on current market conditions and escalation. Scope, including a new roof was added due to significant structural upgrades that will cause major modifications to the existing roof.
- The Bond Management Team has reviewed the design with the educational specifications group and the Architect presented the project to the School Board on October 19th. Both groups provided positive feedback to the design.
- The design development drawings were reviewed and feedback provided to the design team.
- The land use application was approved by the City of West Linn.

Upcoming Activities:

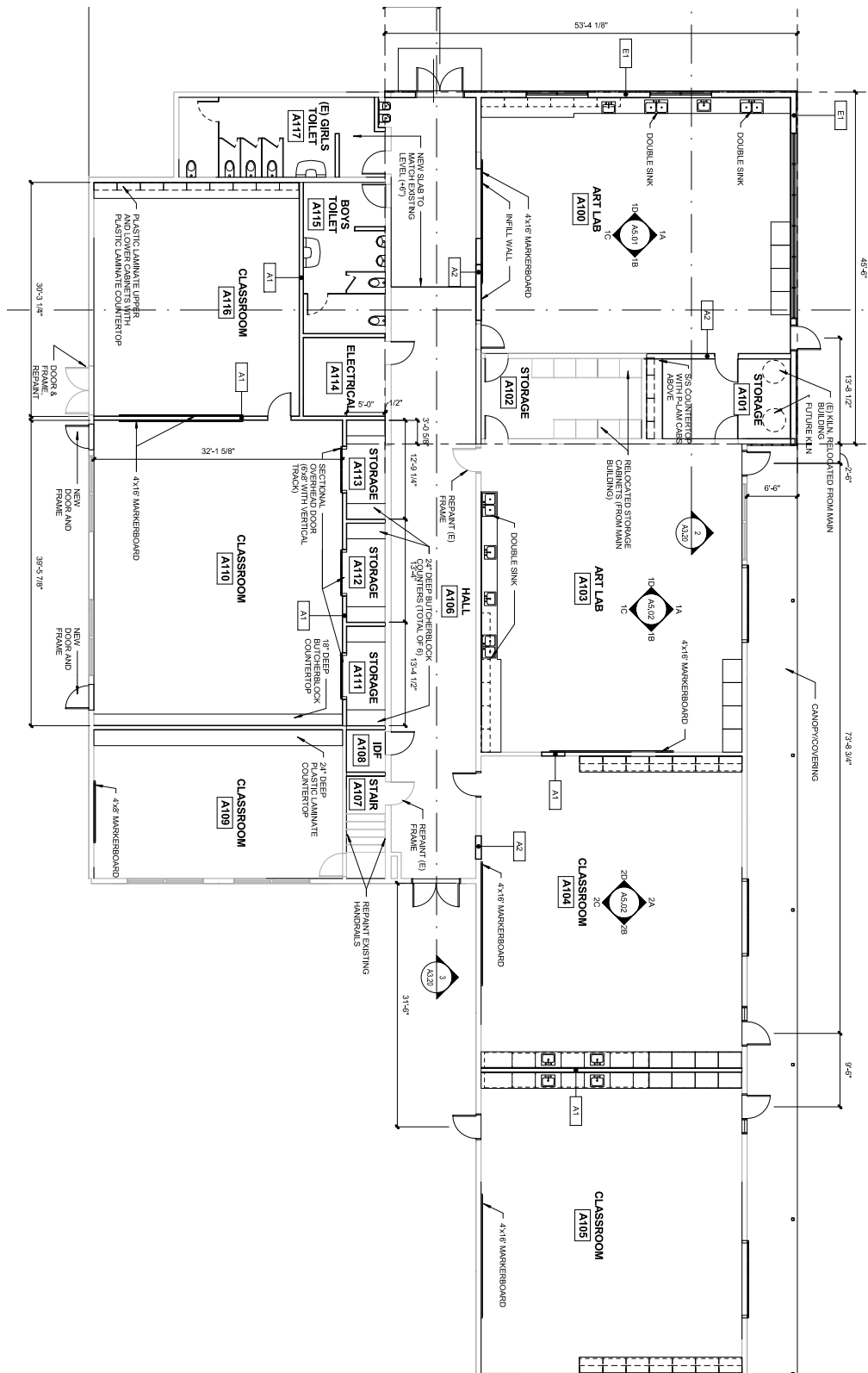
- The construction document phase of design will be complete in late January.
- A final estimate based on the construction documents will be delivered at the end of January.
- The design will be submitted for building permit review in February.
- Contractor bid process is scheduled to begin in February.

700 BUILDING RENOVATION & ADDITION AT WLHS

Q4 2015

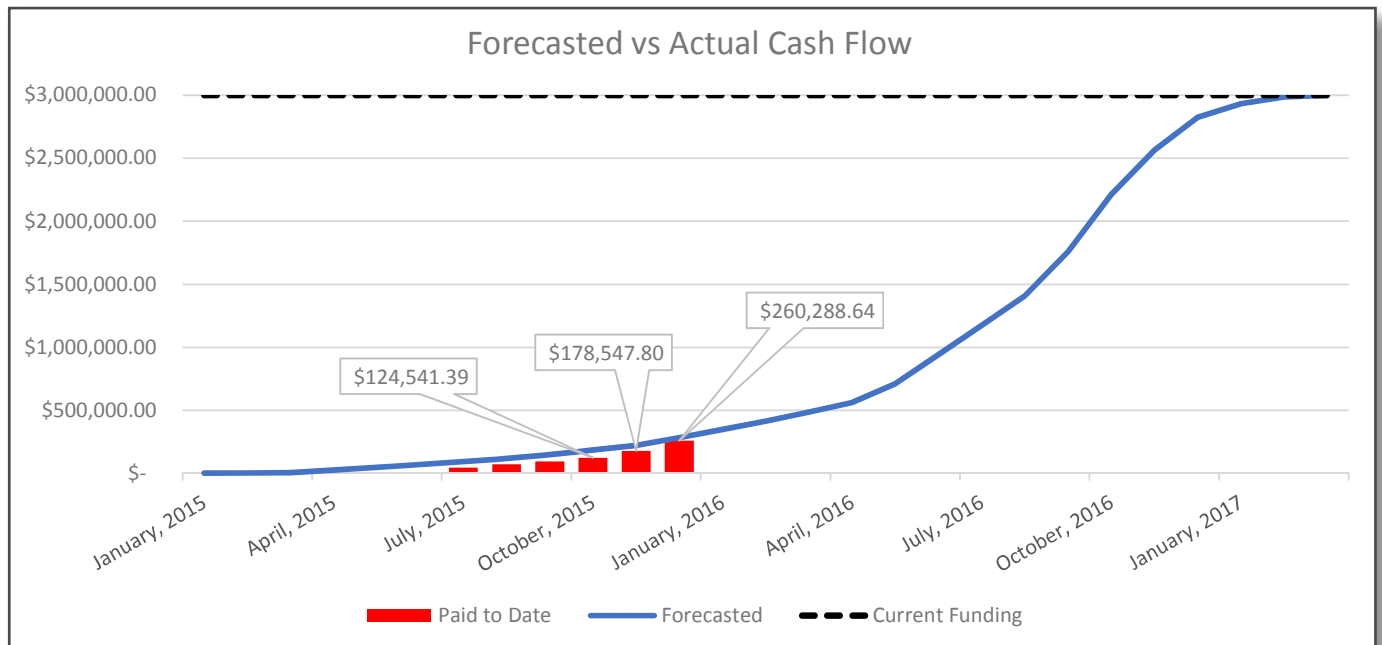


700 BUILDING RENOVATION & ADDITION AT WLHS



PERFORMING ARTS RENOVATION & ADDITION @ WHS

Q4 2015



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Recent Activities:

- The design development estimate showed a marked increase in the anticipated cost of construction based on current market conditions and escalation.
- The design development drawings were reviewed and feedback provided to the design team.
- The construction document drawings have been received and are currently being reviewed by the Bond Management Team.
- The design development estimate is currently being prepared.
- The project received land use approval from the City of Wilsonville.

Upcoming Activities:

- Design development estimate review.
- Building permit process is scheduled to begin in January.
- Contractor bid process is scheduled to begin in February.



Q4 2015



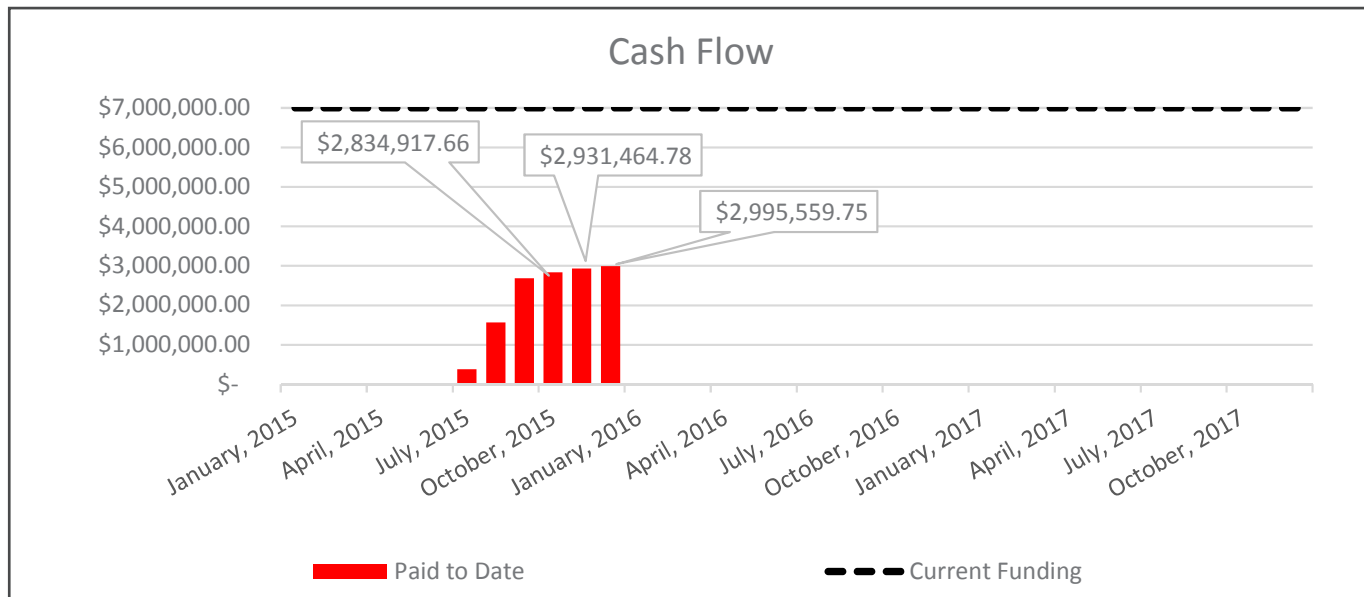
Architectural floor plan of the second floor of a building. The plan shows various rooms and their dimensions. The rooms include:

- CHOIR ROOM [A100]
- CHOIR OFFICE [A104]
- MUSIC STORAGE [A103]
- GYM STORAGE [A121]
- PRACTICE [A117, A118, A119]
- DRESSING ROOM [A107]
- HALLWAY [A120]
- PRACTICE [A116]
- ENSEMBLE [A114]
- BAND OFFICE [A112]
- MUSIC STORAGE [A111]
- BAND ROOM [A113]
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The plan includes a grid system with letters A through E and numbers 1 through 5. The plan includes a title block in the top right corner with the text 'SECOND FLOOR' and 'ARCHITECTURAL FLOOR PLAN'.

LEARNING WITH TECHNOLOGY

Q4 2015



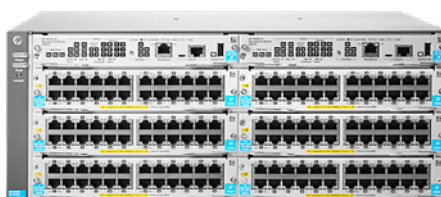
The first major wave of student device updates was completed in the summer of 2015. The next large-scale device update is currently planned for summer of 2017. The primary purpose of staggering these updates is to disperse the financial load of updating obsolete devices across multiple fiscal years. The second goal is to ensure that some current devices are available and in use at all times. The third reason is to balance staff time between installing new devices and routine summer maintenance operations.

Recent Activities:

- WAN Updates
- Wifi Updates
- Server and Storage Updates
- County Fiberoptic Internet Upgrades
 - District Office
 - Willamette Primary
 - Three Rivers
 - West Linn High
 - Boeckman Creek Primary
 - Wilsonville High
- West Linn High School Auditorium AV Upgrades
- Boones Ferry Primary AV Upgrades
- Boeckman Creek Primary Intercom Replacement
- Device Updates
 - 3D Printers
 - Circuit Kits
 - Computers
 - Projectors
 - Document Cameras

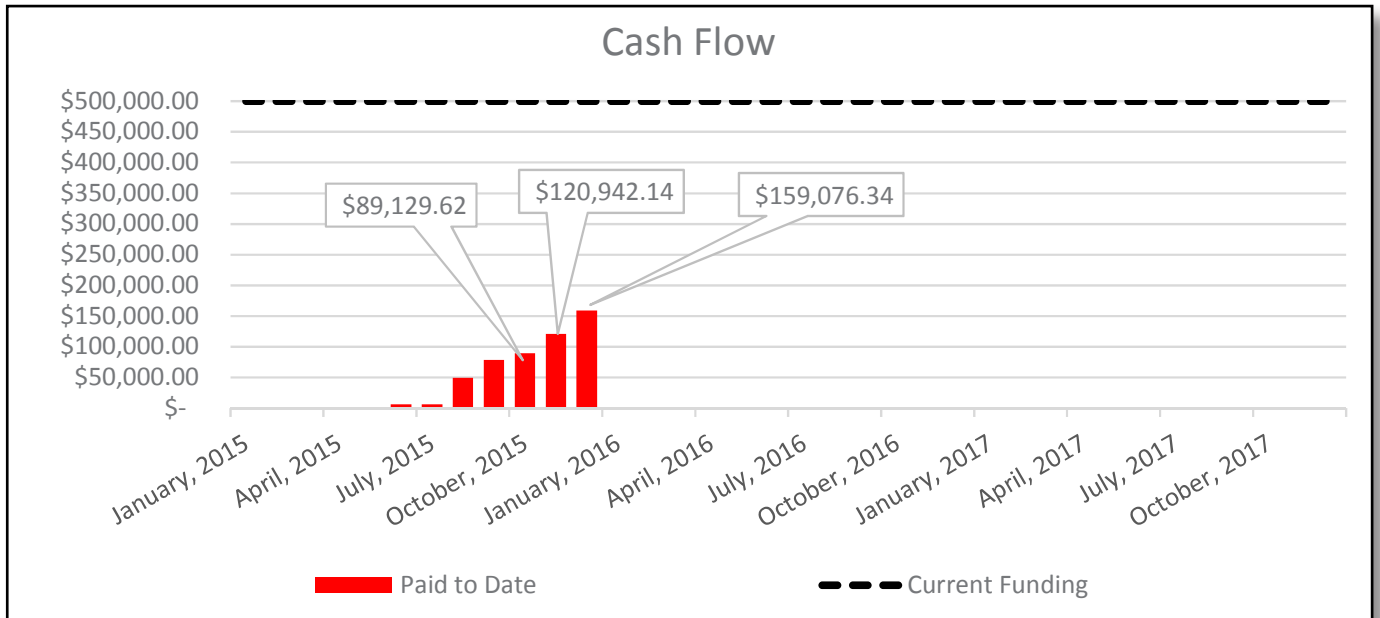
Upcoming Activities:

- WAN Updates
- County Fiberoptic Internet Upgrades
 - Boones Ferry Primary
 - Inza Wood Middle
 - Bolton Primary
 - Sunset Primary
 - Athey Creek Middle
 - Stafford Primary
 - Trillium Creek Primary
 - Rosemont Ridge Middle
- Planning for Future Updates



SAFETY & SECURITY

Q4 2015



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 as 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:

- Eiert & Associates conducted safety and security assessments district-wide.
- Building communication system enhancements at several schools.
- Safety and security site assessment reports have been received.

Upcoming Activities:

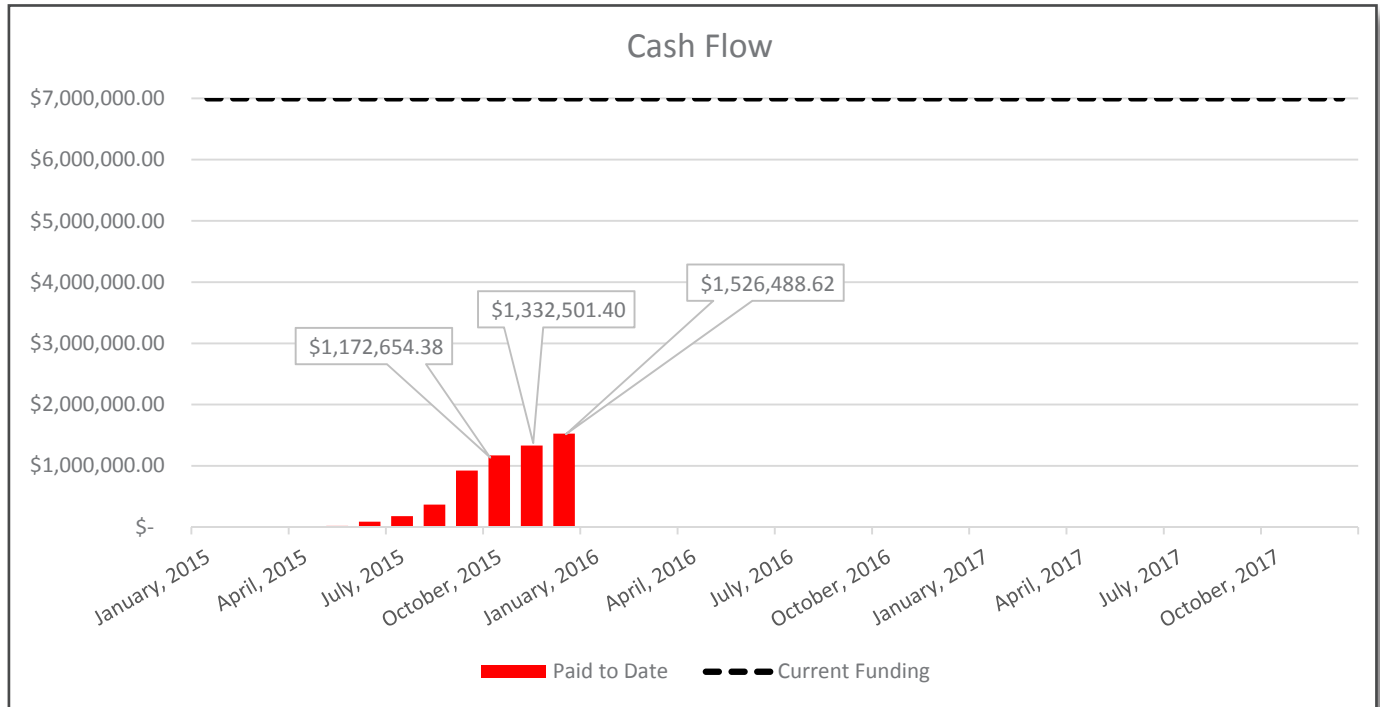
- Continue review of Federal and State law and policy around school safety.
- Update district emergency response plans.
- Continue safety reviews of new project designs.



DISTRICT-WIDE IMPROVEMENTS

Q4 2015

This category of projects represents work at all district sites that has been identified over time as improvements that response 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.



2015 Improvements Projects:

15008 – Drainage & Play Equipment @ RR, ST, WM

School	Task	Status
Rosemont Ridge	Baseball field drainage	Complete
Rosemont Ridge	Play equipment	Purchased & received
Stafford Primary	Playground drainage	Summer 2016
Stafford Primary	Play equipment	Purchased & received
Willamette Primary	Play equipment	Purchased & received

Notes:

The play equipment was purchased and delivered to the district. The project will be bid in March or April with a planned construction starting in June.



DISTRICT-WIDE IMPROVEMENTS

Q4 2015

15010 – Painting @ ST, WM, WHS

School	Task	Status
Stafford	Exterior painting	Summer 2016
Willamette	Interior corridor painting	Summer 2016
Wilsonville	Select stadium handrail painting	Summer 2016

Project Status:

Public bid process held, low bid contractor refused to sign contract. The project will be bid again in March or April for completion this summer.

15011 – Select Restroom Renovation @ BC, ST, WLHS

School	Task	Status
Boeckman Creek	Select Restroom Renovation	Complete
Stafford	Select Restroom Renovation	Complete
West Linn	Select Restroom Renovation	Summer 2016 or 2017

Project Status:

Restroom renovations at Boeckman Creek and Stafford were completed in-house by the district this summer.

The work at West Linn High School will require design assistance and a contractor and will occur summer 2016 or 2017.

15012 – Robotics Renovation @ WHS

School	Task	Status
Wilsonville	Robotics Garage Renovation	Complete

Project Status:

The project is complete.

Before:



After:



DISTRICT-WIDE IMPROVEMENTS

Q4 2015

15015 – Concession/Restroom/Team Room @ RR

School	Task	Status
Rosement Ridge	Concession/Restroom/Team Room	Active

Project Status:

The project is currently in construction and is on schedule for completion in February.



CONSTRUCTION TERMINOLOGY

Q4 2015

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.