



# Bond Accountability Committee Meeting

January 28, 2016



## Agenda

- Welcome & Introductions 5:00pm
- Public Comments 5:05pm
- Program Update 5:15pm
- BAC Discussion 6:30pm
- Wrap-Up 6:50pm
- Adjourn 7:00pm

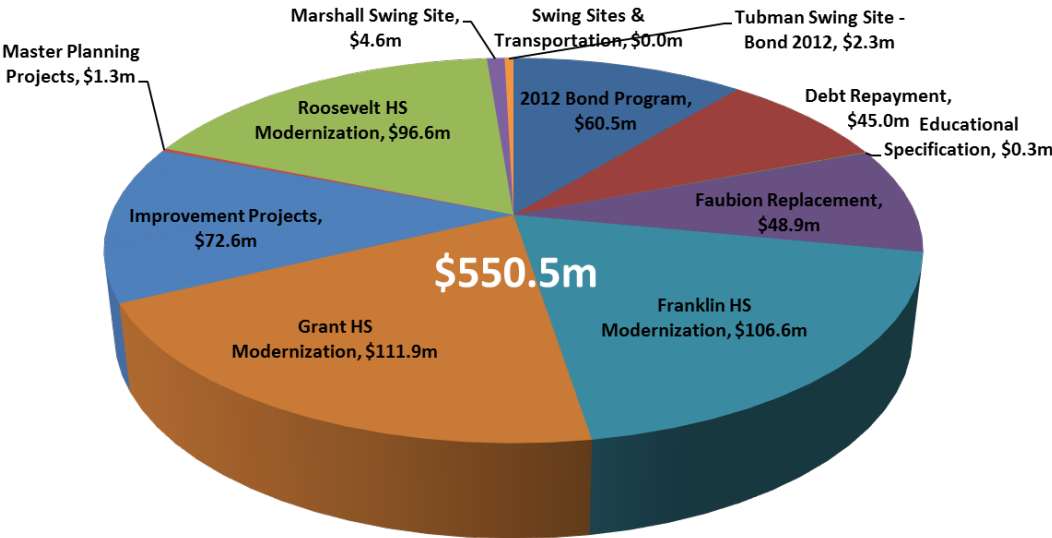


# Public Comments



# Program Update

## Program Projected Budget Break-Down



## Balanced Scorecard Program Status

Perspective	Last Meeting	Current
Overall	Green	Green
Budget	Green	Green
Schedule	Green	Green
Stakeholder	Green	Green
Equity	Green	Yellow

## Comments

1. Franklin HS is in the Construction Phase
2. Roosevelt HS in the Construction Phase
3. Faubion PK-8 is in the Construction Phase
4. Grant HS is in the Schematic Design Phase
5. IP15 projects are in the Close-Out Phase except Ainsworth
6. Tubman Improvement Project is in the Close-Out Phase
7. IP16 is in the Design Phase

## Schedule

### ONGOING PROJECTS

Projects	Construction Complete	2014				2015				2016				2017				2018			
		1 Qtr	2 Qtr	3 Qtr	4 Qtr	1 Qtr	2 Qtr	3 Qtr	4 Qtr	1 Qtr	2 Qtr	3 Qtr	4 Qtr	1 Qtr	2 Qtr	3 Qtr	4 Qtr				
Franklin HS	Mar 2017																				
Roosevelt HS	Nov 2017																				
Grant HS	Mar 2019																				
Faubion PK-8	Apr 2017																				
IP14	Aug 2014																				
IP15	Aug 2015																				
IP15-Science	Aug 2015																				
IP15-Maplewood	Aug 2015																				
Tubman Improve	Aug 2015																				
IP16	Aug 2016																				
IP17	Aug 2017																				

Planning & Design
Construction and Post Construction Activities
Move In - Close-out - Warranty

## Anticipated Progress Next Period

1. Franklin HS will continue in the Construction Phase
2. Roosevelt HS will continue in Construction Phase 1
3. Faubion PK-8 will continue in the Construction Phase
4. Grant will be in the Schematic Design Phase
5. The final elevator for IP15 will be close to completion
6. IP16 will be in the Procurement Phase for Construction



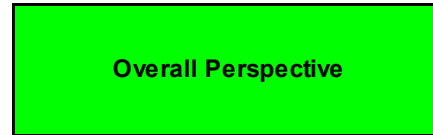
# Program Update

## Balanced Scorecard – Overall Perspective

### Narrative Comments:

1. Roosevelt and Franklin are busy with construction activity both inside and outside the buildings.
2. Faubion School construction contract has been awarded to Todd Construction and the Notice to Proceed has been issued.
3. Master Planning efforts at Benson, Lincoln and Madison have begun and Master Planning Committees have been meeting.
4. Grant has held 2 successful public Design Work Shops and continues to hold DAG meetings and make progress on the design.
5. The IP2015 elevator at Woodlawn is complete and turned over for school use. The IP2015 elevator at Ainsworth is planned for completion no later than April while all other sites are in close-out.
6. The IP2016 design effort is well underway and Staff is assessing projects for

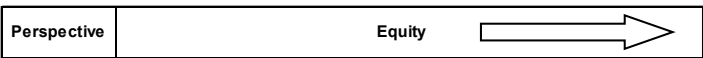
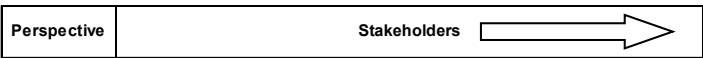
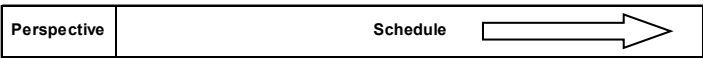
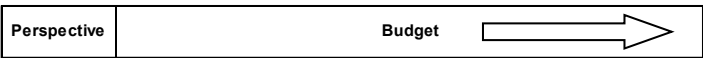
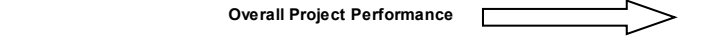
Color Key	
	Good
	Concerns
	Difficulty



Perspective	Perform
Budget	
Schedule	
Stakeholders	
Equity	
Average	

### 2012 Bond Projects

Improvements 2016	Roosevelt HS	Faubion K8	Improvements 2014	Franklin HS	Improvements 2015	Improvements 2015-SCI	Grant HS	Marshall Campus	Improvements 2015-Maple	Tubman	Program Contingency	Program Mgmt
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# Program Update

## Balanced Scorecard – Stakeholder Perspective

<b>Narrative Comments:</b> 1. No major changes to stakeholder feedback. We will be requesting feedback from the Grant DAG soon and continue to follow up on the other projects.			<table border="1"> <tr> <th colspan="2">Color Key</th> </tr> <tr> <td style="background-color: green;">Good</td> <td></td> </tr> <tr> <td style="background-color: yellow;">Concerns</td> <td></td> </tr> <tr> <td style="background-color: red;">Difficulty</td> <td></td> </tr> </table>		Color Key		Good		Concerns		Difficulty		<div style="background-color: green; padding: 10px; border: 1px solid black; font-weight: bold; font-size: 1.2em;">Stakeholder Perspective</div>		<table border="1"> <tr> <th>Strategic Obj.</th> <th>Perform</th> </tr> <tr> <td>A</td> <td style="background-color: green;"></td> </tr> <tr> <td>B</td> <td style="background-color: green;"></td> </tr> <tr> <td>C</td> <td style="background-color: yellow;"></td> </tr> <tr> <td>Average</td> <td style="background-color: green;"></td> </tr> </table>		Strategic Obj.	Perform	A		B		C		Average															
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# Program Update

## Balanced Scorecard – Equity Perspective

**Narrative Comments:**

1. Total amount paid to certified MWESB firms to date exceeds \$7.8 million. Total MWESB participation for consultants continues to exceed the 18% goal, whereas the participation for contractors is below 5%. Overall for program is 8.5%.

2. Good effort shown on the workforce equity over the last few months on the high school projects. Previously both FHS and RHS had been below the 20% goal, but as anticipated, as more trades began work on the site both projects are now over the goal. On the IP2015 work a few contractors / subcontractors did not meet expectations. Three warning letters were sent and one prime contractor was fined for noncompliance.

3. Student participation continues to go great. Lease Crutcher Lewis provided a site tour for RHS's Introduction to Construction class that received good press coverage in December. The Portland Workforce Alliance's NW Youth Career Expo is happening in February and the

Color Key	
	Good
	Concerns
	Difficulty

### Equity Perspective

Strategic Obj.	Perform
A	
B	
C	
Average	

**2012 Bond Projects**

Improvements 2016	Roosevelt HS	Faubion K8	Improvements 2014	Franklin HS	Improvements 2015	Improvements 2015-SCI	Grant HS	Marshall Campus	Improvements 2015-Maple	Tubman		Program Mgmt

Strategic Objectives	Performance Measures	Performance Targets
Objective A Meets Aspirational MWESB	1 Project objectives established	Green: MWESB >18% Yellow: MWESB >10% Red: MWESB <10%
	2 Consultants - % of payments made to MWESB owned	
	3 Contractors - % of payments made to MWESB owned	
Objective B apprenticable trade participation	4 Project objectives established >\$200k contracts	Green: participation >20% Yellow: participation >10% Red: participation <10%
	5 Contractors % of labor hours/apprenticable trade	
Objective C Meets student participation	6 Project objectives established >\$100k contracts	Per AD
	7 Tier 1 - Group Activities EG: career fairs, guest speakers	Green: students > 500 Yellow: students > 100 Red: students < 100
	8 Tier 2 - 1-on-1, Short-Term Activities EG: job shadows, mock interviews	Green: students > 50 Yellow: students > 20 Red: students < 20
	9 Tier 3 - 1-on-1, Long-Term Activities EG: internships	Green: students > 10 Yellow: students > 5 Red: students < 5

	2013	2014	2015	2016	2017	2018	2019	2020

January 2016

7



# Student Involvement / Career Learning 2015 Totals

**1614**

Activity Hours

**45**

Activities

**80**

Presenters/Participants

**1219**

Students Served





## Recent Highlights



## Franklin Then and Now

In January, 3 Franklin journalism students toured Franklin to write stories about their old school, where it is now, and what the future will look like. Skanska was available for interviews with each student.





## Roosevelt 101

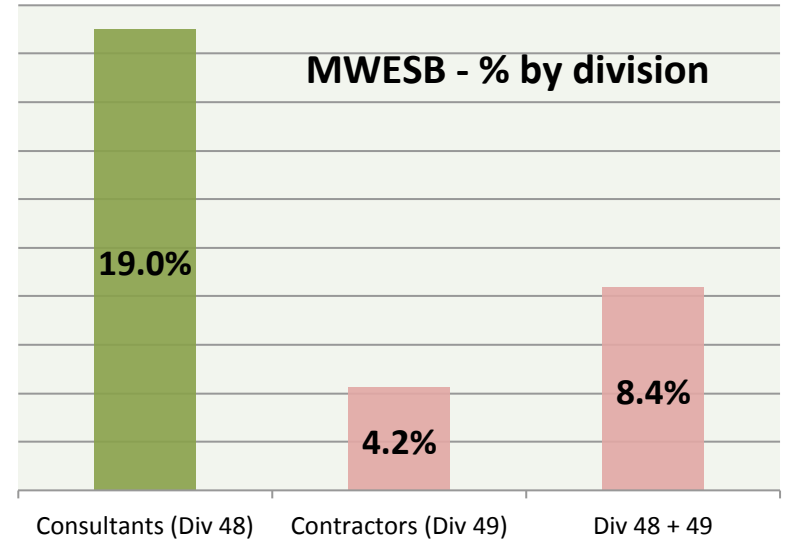
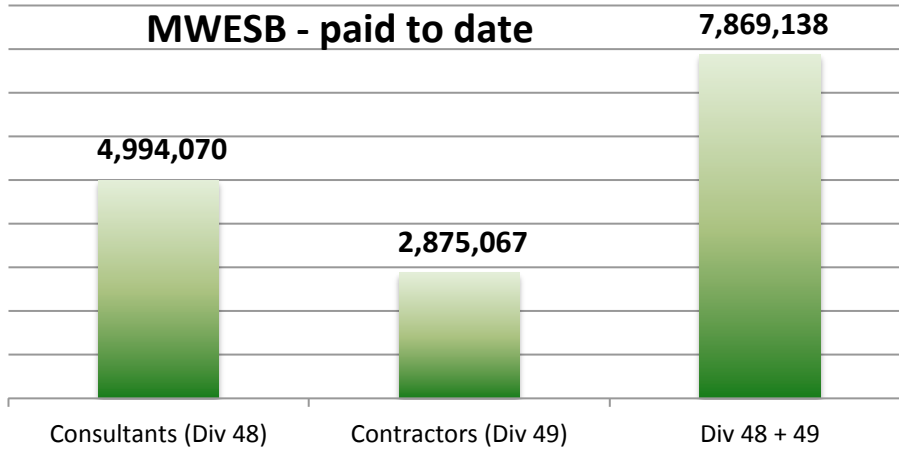
In November of 2015, 30 students from the RHS Freshman Construction class toured the site and got an in depth question and answer session with Lease Crutcher Lewis about the myriad of activities necessary to complete a project.



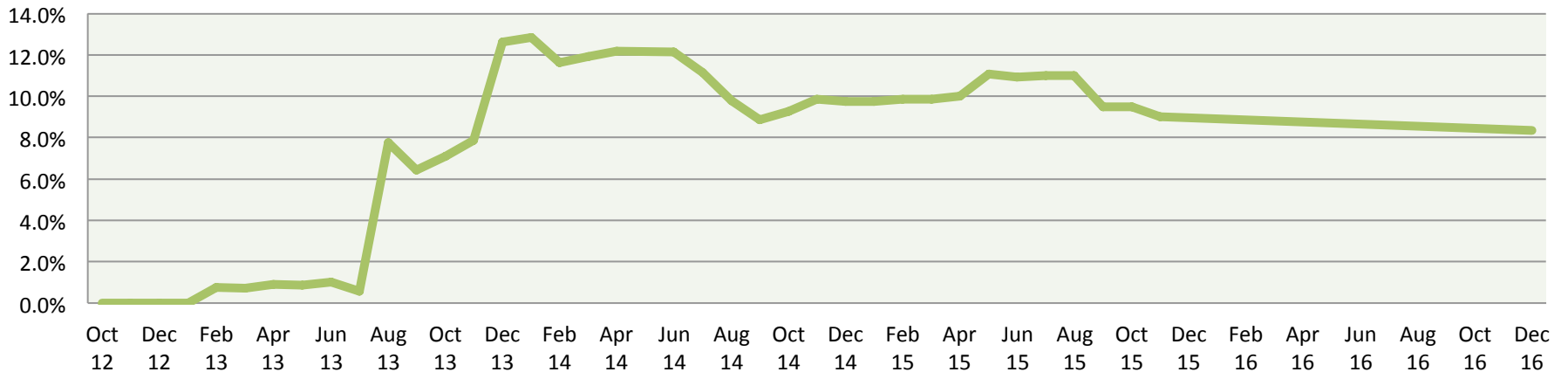


# Program Update

## Balanced Scorecard – Equity Perspective



### MWESB Participation (Div 48 + Div 49)





# Program Update

## Balanced Scorecard – Budget Perspective

**Narrative Comments:**

- Total bond program budget has remained constant at approximately \$550 million.
- The IP2015 projects and Tubman are all finishing up with budget savings. IP2016 has received pricing exceeding current budget. The project team is reviewing options for reducing pricing and the possible need for additional funding.
- Faubion received three bids for the general contractor scope of work. The 3 bids were close in price (which is a good indicator of the quality of the construction documents). The low bid was over the budgeted amount but contingency within the project will be used to cover the cost. No additional funds are needed at this time to support Faubion.
- Franklin and Roosevelt are proceeding through construction. Project budgets are tight and the teams are keeping a close eye on them.
- Grant received cost estimates for master planning and is on budget.

Color Key	
	Good
	Concerns
	Difficulty

Strategic Obj.	Perform
A	
B	
C	
D	
Average	

### 2012 Bond Projects

Improvements 2016	Roosevelt HS	Faubion K8	Improvements 2014	Franklin HS	Improvements 2015	Improvements 2015-SCI	Grant HS	Marshall Campus	Improvements 2015-Maple	Tubman	Program Contingency	Program Mgmt
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Strategic Objectives	Performance Measures	Performance Targets
<b>Objective A</b> Project Budget and Scope	1 Initial Cost Estimate of Approved Scope	> 10% Contingency Available
	2 Master Plan	Within Budgeted Amount
<b>Objective B</b> Planning & Design Costs within Budget	3 Projected Total P & D Costs	Within Budgeted Amount
<b>Objective C</b> Construction Costs within Budget	4 Construction Cost Award Price or GMP	Within Budgeted Amount
	5 Construction Cost Current Estimate thru 50% complete	>5% project level contingency
<b>Objective D</b> Project within Budget	6 Total Project Costs Within Budgeted Amount	Within Budgeted Amount



# Program Update

## OSM Project Management Cost Report

### Resources

GO Bond	482,000,000
Bond Sale Premium	47,081,952
Earned Interest	310,318
Concordia University	15,539,710
State Rehabilitation Grant Program (SRGP)	2,832,390
SRGP Match (Fund 405)	85,068
Senate Bill 1149	1,606,015
Facilities & Asset Management (FAM)	198,057
Energy Trust	28,580
Debt Savings (Fund 405)	783,880
Verizon Roof Design	7,478
Great Field Funds	65,517
	<b>550,538,965</b>

### Notable Resources Changes

- **Added \$29k of additional Concordia University funds**



# Program Update

## OSM Project Management Cost Report

Project Name	Prior Meeting Budget	Current Meeting Budget	Delta
Franklin HS Modernization	106,570,859	106,570,859	0
Grant HS Modernization	111,891,581	111,891,581	0
Roosevelt HS Modernization	96,617,431	96,617,431	0
Faubion Replacement	48,840,418	48,870,128	29,710
Improvement Project 2013	11,969,300	11,969,300	0
Improvement Project 2014	18,106,799	18,106,799	0
Improvement Project 2015	13,448,142	13,623,142	175,000
Improvement Project 2015 - Maplewood	1,644,527	1,644,527	0
Improvement Project 2015 - SCI	2,542,153	2,542,153	0
Improvement Project 2016	13,565,783	13,565,783	0
Improvement Project 2017	10,225,934	10,225,934	0
Improvement Project 2018	642,311	642,311	0
Improvement Project 2019	273,995	273,995	0
Master Planning - Benson HS	500,000	500,000	0
Master Planning - Cleveland HS	0	0	0
Master Planning - Jefferson HS	0	0	0
Master Planning - Lincoln HS	400,000	400,000	0
Master Planning - Madison HS	400,000	400,000	0
Master Planning - Wilson HS	0	0	0
Marshall Swing Site - Bond 2012	4,359,080	4,609,080	250,000
Tubman Swing Site - Bond 2012	2,335,000	2,335,000	0
Swing Sites & Transportation	0	0	0
Educational Specification	300,000	300,000	0
Debt Repayment	45,000,000	45,000,000	0
2012 Bond Program	60,875,944	60,450,944	-425,000
<b>Total</b>	<b>550,509,258</b>	<b>550,538,968</b>	<b>29,710</b>

### Notable Budget Changes

- **Transferred \$450k from the CSM Contingency into IP2015 and Marshall**
- **Added additional Concordia University funds for improvement specific to CU space**



# Program Update

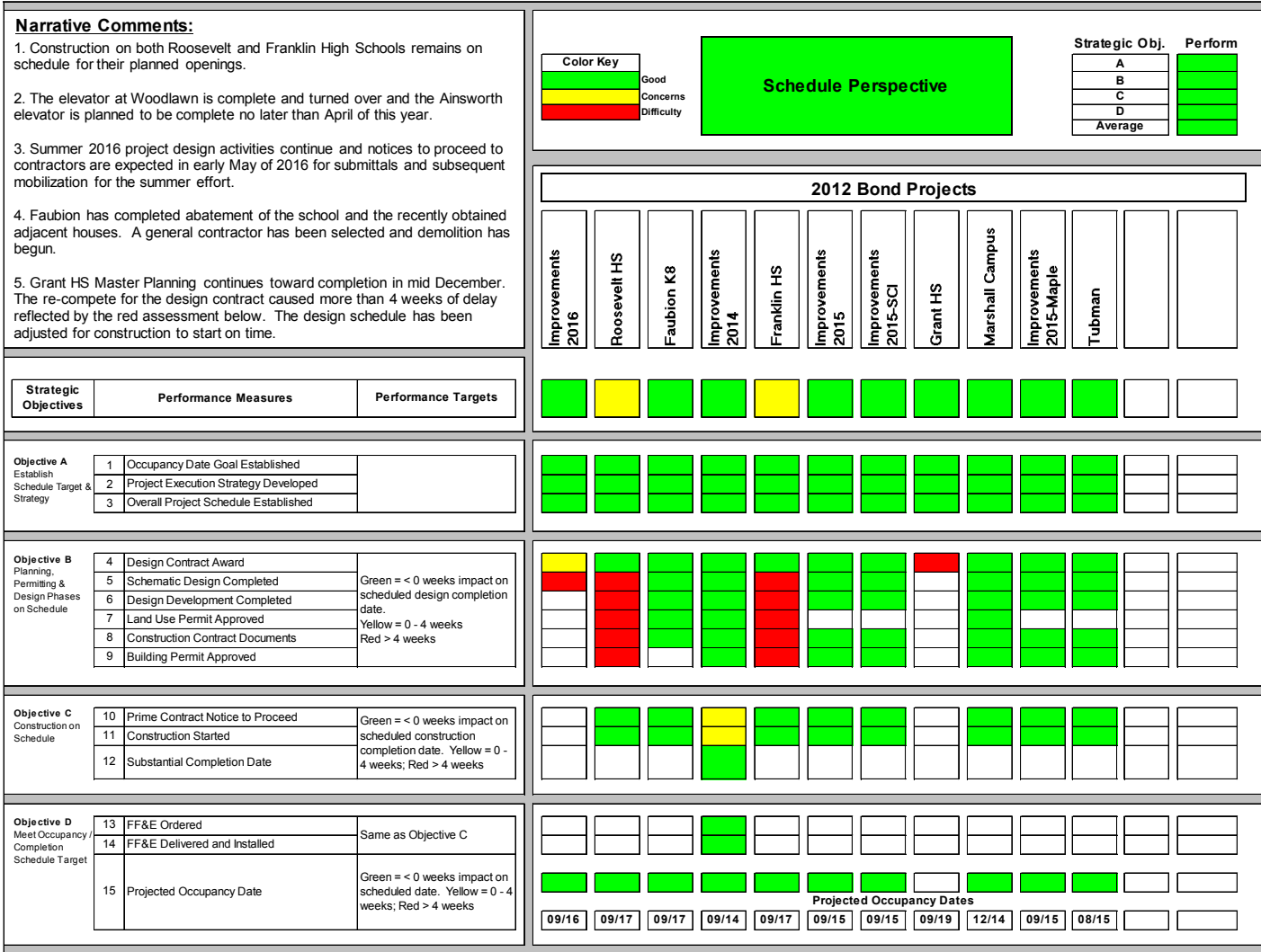
## OSM Project Management Cost Report

Project Name	Original Project Budget	Project Budget Changes	Current Budget	Project Estimate At Completion	Forecasted Over/ (Under)	Invoices Approved
Franklin HS Modernization	81,585,655	24,985,204	106,570,859	101,972,439	(4,598,420)	21,339,042
Grant HS Modernization	88,336,829	23,554,752	111,891,581	99,527,395	(12,364,186)	686,458
Roosevelt HS Modernization	68,418,695	28,198,736	96,617,431	91,193,948	(5,423,483)	15,225,802
Faubion Replacement	27,035,537	21,834,591	48,870,128	46,134,450	(2,735,678)	4,062,918
Improvement Project 2013	9,467,471	2,501,829	11,969,300	11,963,139	(6,161)	11,963,139
Improvement Project 2014	13,620,121	4,486,678	18,106,799	17,877,636	(229,163)	17,810,325
Improvement Project 2015	13,521,066	102,076	13,623,142	13,585,139	(38,003)	12,828,168
Improvement Project 2015 - Maplewood	-	1,644,527	1,644,527	1,531,272	(113,255)	1,514,124
Improvement Project 2015 - SCI	-	2,542,153	2,542,153	2,140,989	(401,164)	1,978,018
Improvement Project 2016	15,274,437	(1,708,654)	13,565,783	13,651,375	85,592	483,081
Improvement Project 2017	6,796,707	3,429,227	10,225,934	8,692,044	(1,533,890)	-
Improvement Project 2018	9,062,119	(8,419,808)	642,311	545,964	(96,347)	-
Improvement Project 2019	-	273,995	273,995	232,896	(41,099)	-
Master Planning - Benson HS	191,667	308,333	500,000	500,000	-	30,115
Master Planning - Cleveland HS	191,667	(191,667)	-	-	-	-
Master Planning - Jefferson HS	191,667	(191,667)	-	-	-	-
Master Planning - Lincoln HS	191,667	208,333	400,000	398,000	(2,000)	39,433
Master Planning - Madison HS	191,667	208,333	400,000	400,000	-	-
Master Planning - Wilson HS	191,667	(191,667)	-	-	-	-
Marshall Swing Site - Bond 2012	-	4,609,080	4,609,080	4,458,879	(150,201)	3,959,936
Tubman Swing Site - Bond 2012	-	2,335,000	2,335,000	2,109,863	(225,137)	895,636
Swing Sites & Transportation	9,550,000	(9,550,000)	-	-	-	-
Educational Specification	-	300,000	300,000	287,768	(12,232)	275,168
Debt Repayment	45,000,000	-	45,000,000	45,000,000	-	45,000,000
2012 Bond Program	93,181,361	(32,730,417)	60,450,944	38,858,107	(21,592,837)	13,695,717
<b>Grand Totals</b>	<b>482,000,000</b>	<b>68,538,968</b>	<b>550,538,968</b>	<b>501,061,303</b>	<b>(49,477,664)</b>	<b>151,787,079</b>



# Program Update

## Balanced Scorecard – Schedule Perspective







## Program Update

### Project Updates

- Franklin High School
- Roosevelt High School
- Grant High School
- Faubion PK-8
- Tubman Campus
- IP2014
- IP2015
- IP2015-SCI
- IP2015-Maplewood
- IP2016
- Master Planning



## Project Description

**Brief Project Description:** Full campus modernization to accommodate a student capacity of 1,700 and a core capacity of 1,700 students based on a master planning process that included stakeholder input. All campus functions have been relocated to the Marshall Campus.

**Current Project Phase:** Construction

**Construction Start:** Summer of 2015

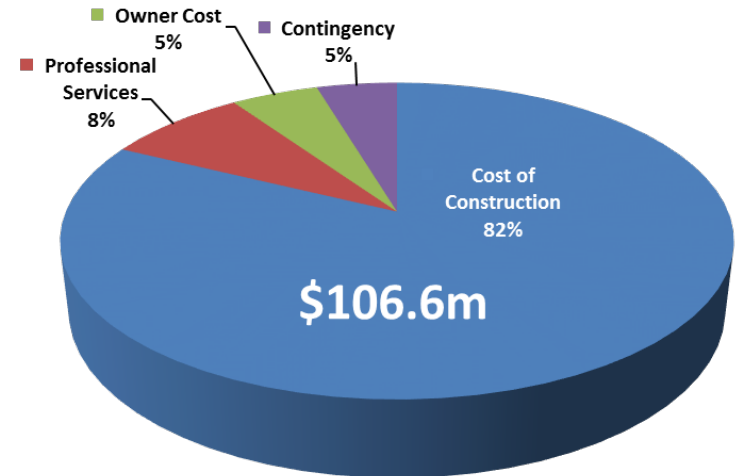
**Construction Duration:** 21.6 Months

**Scheduled Completion:** Summer of 2017

**Design Firm:** DOWA-IBI Group

**Contractor:** Skanska

## Projected Budget Breakout



## Comments

1. **Some Work Categories associated with Bid Package #2 - Exterior Historical Renovation and BP#4 (Interior Fit and Finish) have yet to be bought out**
2. **All permits have been secured**
3. **Project Team coordination and clash detection meetings continue**
4. **SAFETY:**
  - **Recordable Accidents: 4**
  - **Reportable Accidents: 0**

## Photos



**January Ice Storm**



**Former Auditorium – Lower Level**



**Interior Demolition**



**Progress on New Gymnasium**

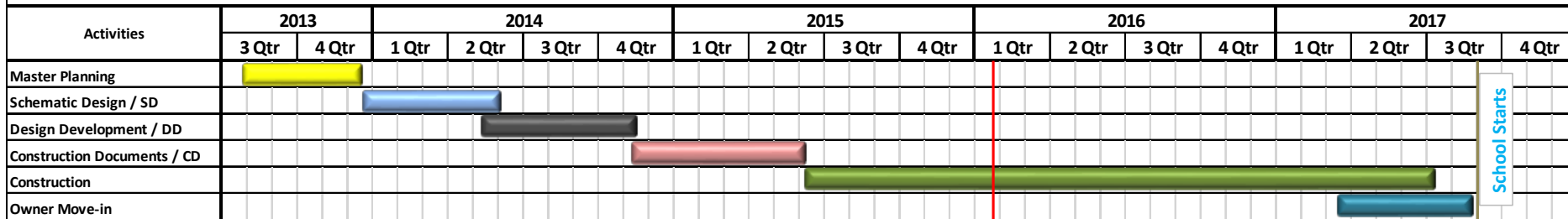


**07:00 AM Concrete Placement Prep**



## Schedule

### Summary Schedule



### Significant Schedule Milestone Assessment

Significant Milestone Activity Name	Baseline		Schedule Update				Actual					
	Start	Finish	Start	Start Delta from PDB *	Finish	Finish Delta from PDB*	Start	Start Delta from PDB*	Start Delta from Update*	Finish	Finish Delta from PDB*	Finish Delta from Update*
Issue Building Permit (BP #3)	10-May-15	10-May-15	17-Aug-15	99	17-Aug-15	99	3-Sep-15	116	17	3-Sep-15	116	17
S1 - Performing Arts Center	29-Jun-15	17-Mar-17	29-Jun-15	0	21-Apr-17	35	29-Jun-15	0	0			
S2 - STEM/CTE	29-Jun-15	30-Nov-16	29-Jun-15	0	29-Mar-17	119	29-Jun-15	0	0			
S5 - Student Commons	9-Jul-15	16-Feb-17	9-Jul-15	0	17-Apr-17	60	9-Jul-15	0	0			
S7 - Athletic Bldg	22-Jul-15	3-Jan-17	22-Jul-15	0	6-Jan-17	3	22-Jul-15	0	0			
S3 - West Wing Classroom Renovations	31-Jul-15	23-Nov-16	31-Jul-15	0	4-Jan-17	42	31-Jul-15	0	0			
S4 - Main Building Renovations	4-Sep-15	29-Dec-16	4-Sep-15	0	11-Apr-17	103	4-Sep-15	0	0			
S6 - East Wing Renovations	21-Sep-15	2-Dec-16	21-Sep-15	0	28-Feb-17	88	19-Aug-15	-33	-33			
S8 - Grandstand & Concessions	28-Jul-16	2-Dec-16	2-May-16	-87	3-Oct-16	-60						
Owner Move In	21-Mar-17	23-Aug-17	17-Mar-17	-4	24-Aug-17	1						
Substantial Completion Building	17-Mar-17	17-Mar-17	17-Mar-17	0	17-Mar-17	0						
Substantial Completion Site	19-Jul-17	19-Jul-17	11-Jul-17	-8	11-Jul-17	-8						

Activity has reached some or all completion dates

\* Calendar Days

S1 thru S8 are site construction sectors

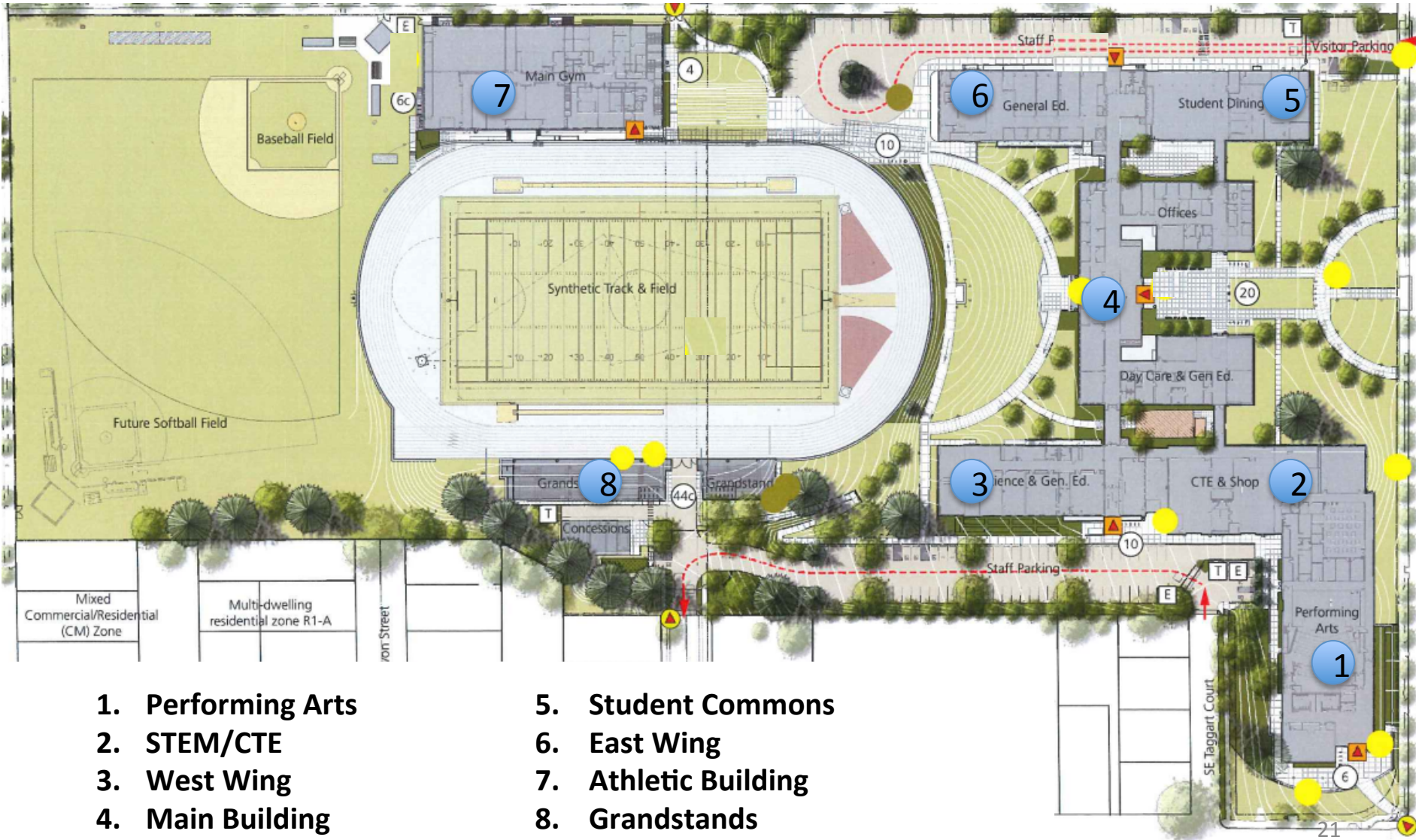
#### Construction Status

**Percent Complete Planned: 21%**

**Percent Complete Actual: 19%**



## Site Area Diagram



- 1. Performing Arts
- 2. STEM/CTE
- 3. West Wing
- 4. Main Building

- 5. Student Commons
- 6. East Wing
- 7. Athletic Building
- 8. Grandstands



## Project Description

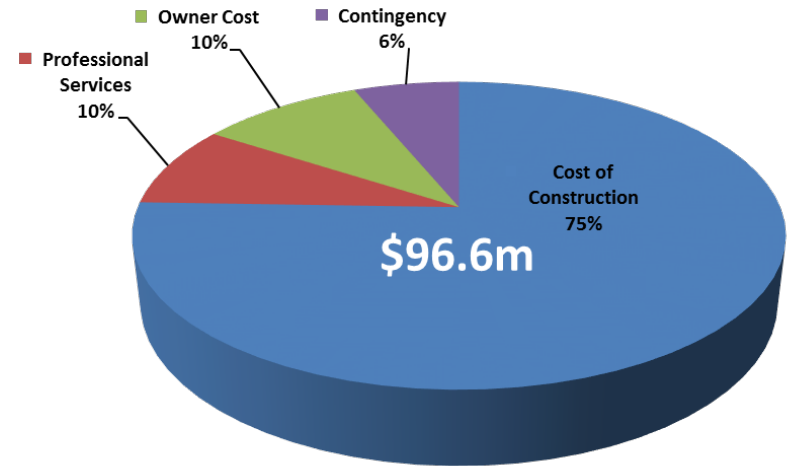
**Brief Project Description:** Full campus modernization to accommodate a student capacity of 1,350 and a core capacity of 1,700 based on master planning and schematic design processes that included stakeholder input. All students are to be housed on site during the phased project construction.

**Current Project Phase:** Construction  
**Construction Start:** Spring of 2015  
**Construction Duration:** 31.1 Months  
**Scheduled Building Completion:** Summer of 2017  
**Design Firm:** Bassetti Architects  
**Contractor:** Lease Crutcher Lewis

## Comments

1. Project Buyout is complete.
  - Buyout over-run is \$237,000 outside of GMP
2. Auto Shop changes are still possible but no resolution to date
3. December brought record rainfall and freezing precipitation that hampered progress on the masonry walls
  - We are tracking 3 delay days to the critical path of the schedule
4. Permit 2 was received on 14 Dec 15
5. School is operating without issue or incident
6. SAFETY:
  - Recordable Accidents: 0
  - Reportable Accidents: 0

## Projected Budget Breakout



## Photos



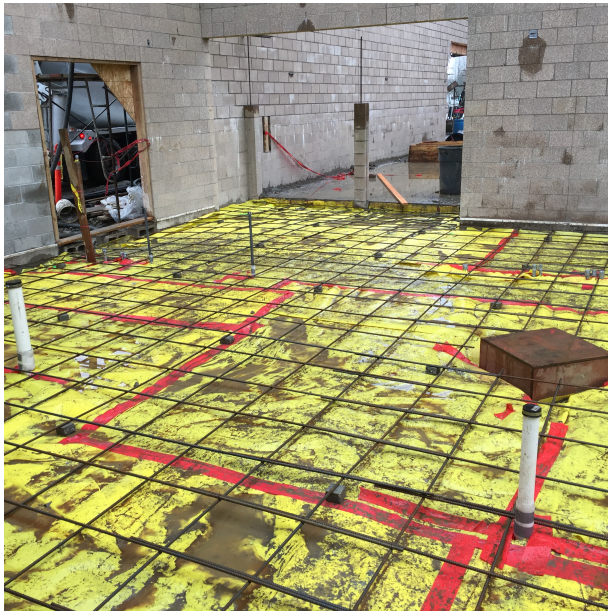
**Area C Structural Steel**



**Auditorium Lower Level Ramp Formwork**



**Locker Room CMU Wall Construction**



**Last SOG in Locker Room Area of Gym Ready for Concrete**



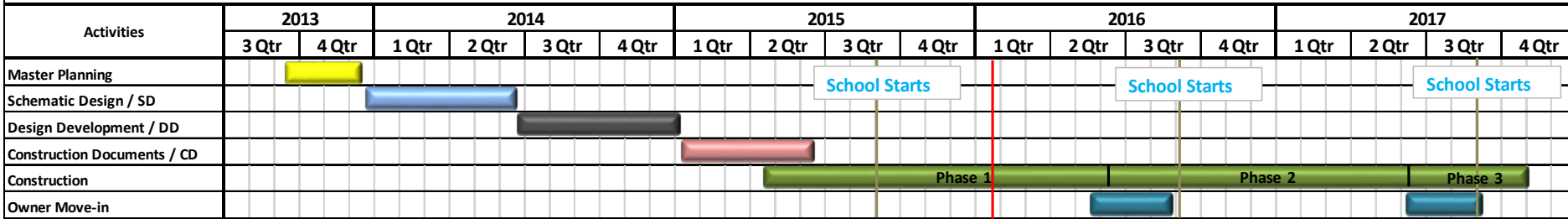
**Metal Decking in Area C South Classrooms**

January 2016



## Schedule

### Summary Schedule



### Significant Schedule Milestone Assessment

Significant Milestone Activity Name	PD Baseline		Schedule Update				Actual					
	Start	Finish	Start	Start Delta from PDB *	Finish	Finish Delta from PDB*	Start	Start Delta from PDB*	Start Delta from Update*	Finish	Finish Delta from PDB*	Finish Delta from Update*
P1 - North Library Demolition	26-Jun-15	27-Jul-15	30-Mar-15	-88	13-Aug-15	17	22-Jun-15	-4	84	10-Jul-15	-17	-34
P1 - Gym Demolition	10-Apr-15	17-Jul-15	30-Mar-15	-11	13-Aug-15	27	17-Apr-15	7	18	18-Aug-15	32	5
P1 - Boiler Room Demolition	16-Jul-15	13-Aug-15	30-Mar-15	-108	13-Aug-15	0	12-Aug-15	27	135	8-Sep-15	26	26
Issue Final Building Permit - BP #2	----	23-Jan-15	29-May-15	----	21-Aug-15	210	29-May-15	----	0	14-Dec-15	325	115
P1 - Media Center / Library	28-Aug-15	27-Jun-16	29-Jun-15	-60	4-Aug-16	38	2-Jul-15	-57	3			
P1 - Gym Construction	29-Jun-15	11-Aug-16	6-Jul-15	7	10-Aug-16	-1	19-Aug-15	51	44			
P1 - Performing Arts / Commons	10-Aug-15	12-Aug-16	28-Sep-15	49	1-Sep-16	20	28-Sep-15	49	0			
Owner Move In - Phase 1	21-Mar-17	----	16-May-16	-309	24-Aug-16	----						
P2 - 1921 Building Construction	7-Sep-16	17-Aug-17	10-Jun-16	-89	6-Jun-17	-72						
P3 - Sitework Construction	13-Jun-17	2-Nov-17	8-May-17	-36	3-Nov-17	1						
Owner Move In - Phase 2	----	23-Aug-17	5-Jun-17	----	5-Sep-17	13						

Activity has reached some or all completion dates

\* Calendar Days

BP = Bid Package

#### Construction Phasing:

- Phase 1 (P1) - New Gymnasium/Classroom Wing/Theater/Renovated Building for New Arts & Media Center
- Phase 2 (P2) - Main Building Fully Renovated
- Phase 3 (P3) - Sitework/ Ball Fields/Demolition of Cafeteria, Library & Removal of Temporary Facilities

#### Construction Status

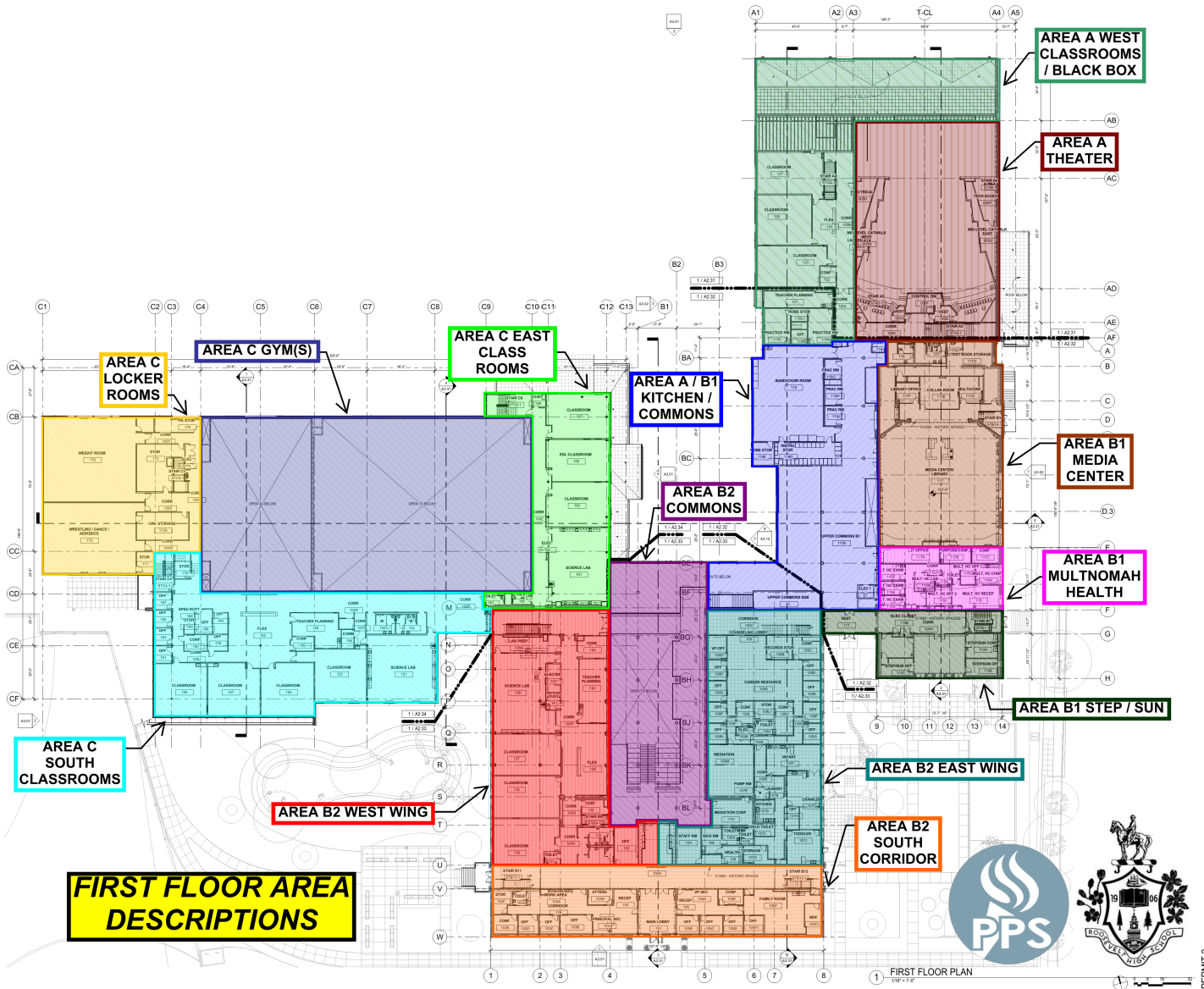
**Percent Complete Planned: 19%**

**Percent Complete Actual: 18%**





## Site Area Diagram



FIRST FLOOR PLAN

PERMIT 2

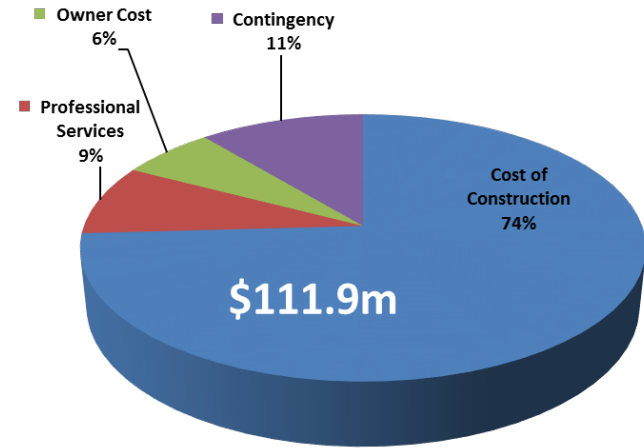


## Project Description

**Brief Project Description:** Full campus modernization to accommodate a student capacity of 1,700 and a core capacity of 1,700 students based on a master planning process that includes stakeholder input. All campus functions are to be relocated to the Marshall Campus during construction.

**Current Project Phase:** Schematic Design  
**Construction Start:** Summer of 2017  
**Construction Duration:** 21.4 Months  
**Scheduled Completion:** Summer of 2019  
**Design Firm:** Mahlum  
**Contractor:** CM/GC To Be Determined

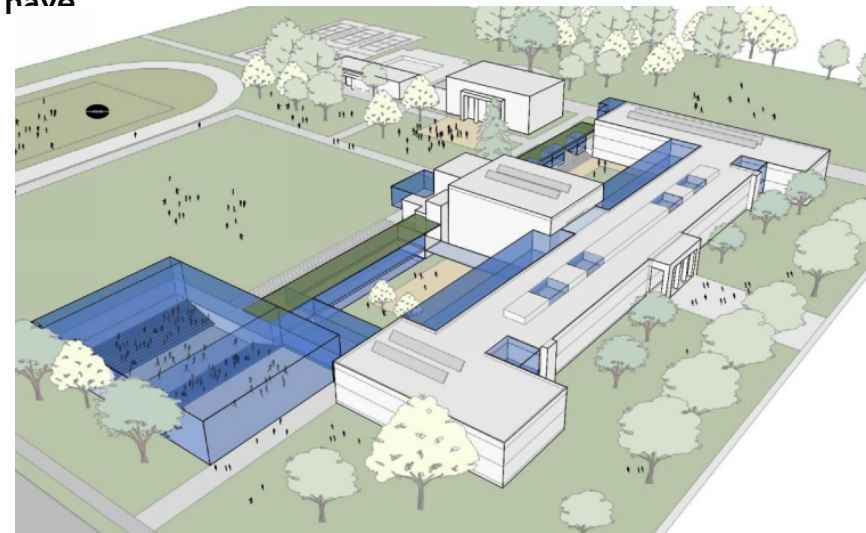
## Projected Budget Breakout



## Comments

1. Both the Master Plan and the CM/GC alternative procurement have been approved through Board action
2. Building testing is ongoing for design
3. Outreach continues and the Project Team has conducted:
  - 7 DAG meetings
  - 2 Master Planning Public Workshops
  - 1 Master Planning Open House
  - 1 Schematic Design Public Workshop

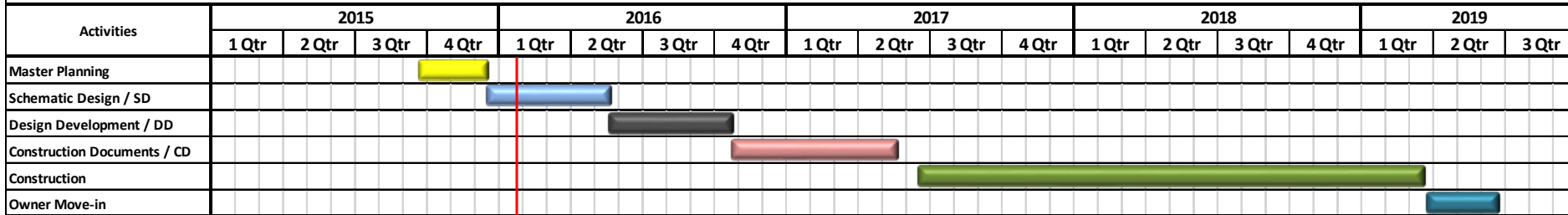
## Photos





## Schedule

### Summary Schedule



### Significant Schedule Milestone Assessment

Significant Milestone Activity Name	Project Director Baseline (PDB)		Schedule Update				Actual					
	Start	Finish	Start	Start Delta from PDB*	Finish	Finish Delta from PDB*	Start	Start Delta from PDB*	Start Delta from Update*	Finish	Finish Delta from PDB*	Finish Delta from Update*
Prepare, Release Design Firm RFP	16-Mar-15	10-Apr-15	4-Feb-15	-40	31-Mar-15	-10	28-Jan-15	-47	-7	29-Jun-15	80	90
Design Notice to Proceed	1-Jul-15	1-Jul-15	19-Aug-15	49	19-Aug-15	49	23-Sep-15	84	35	23-Sep-15	84	35
Master Planning	1-Jul-15	9-Oct-15	19-Aug-15	49	15-Dec-15	67	23-Sep-15	84	35	15-Dec-15	67	0
Master Plan Approved by PPS BOE	9-Oct-15	9-Oct-15	16-Dec-15	68	16-Dec-15	68	15-Dec-15	67	-1	15-Dec-15	67	-1
Schematic Design	10-Oct-15	4-Apr-16	16-Dec-15	67	20-May-16	46	16-Dec-15	67	0			
Request Proposals by CM/GC	6-Nov-15	14-Dec-15	16-Feb-16	102	30-Mar-16	107						
CM/GC Notice To Proceed (Precon)	4-Feb-16	4-Feb-16	3-May-16	89	3-May-16	89						
Design Development	5-May-16	10-Sep-16	20-May-16	15	26-Oct-16	46						
Construction Documents	11-Sep-16	1-May-17	26-Oct-16	45	15-May-17	14						
Sign GMP	7-Oct-16	7-Oct-16	16-Nov-16	40	16-Nov-16	40						
Building Permit	11-Mar-17	9-Jun-17	15-May-17	65	10-Sep-17	93						
CM/GC Mobilize to site	15-Jun-17	15-Jun-17	15-Jun-17	0	15-Jun-17	0						
Substantial Completion		20-Mar-19	20-Mar-19	0	20-Mar-19	0						
Owner Move In		2-May-19	23-Apr-19	-9	20-Jun-19	0						

Activity has reached some or all completion dates

\* Calendar Days

Master Plan	2.8 months
Activity Durations	
SDs	5.2 months
DDs	5.3 months
CDs	6.7 months
Total Design	17.2 months
Construction	21.4 months



## Project Description

**Brief Project Description:** In direct partnership with Concordia University for a full campus replacement, this project will be constructed based on a master planning process that included stakeholder input. All campus functions are to be relocated during construction.

**Current Project Phase:** Construction

**Construction Start:** 4th Quarter of 2015 (Demo)

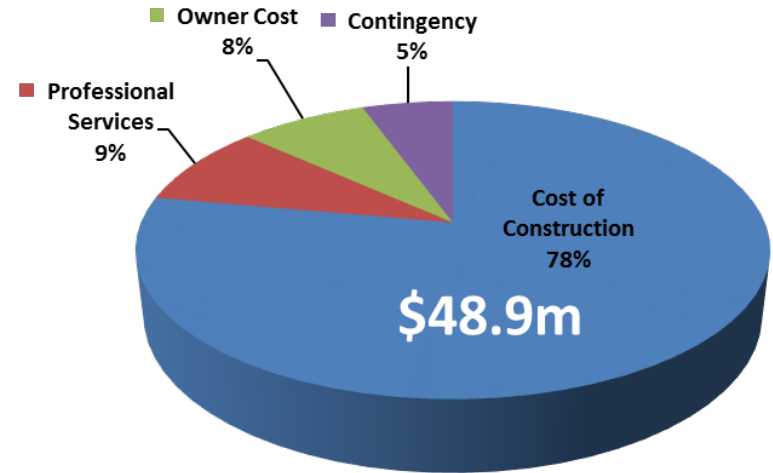
**Construction Duration:** 16.6 Months

**Scheduled Completion:** Summer of 2017

**Design Firm:** BOORA

**Contractor:** Todd Construction

## Projected Budget Breakout



## Comments

1. **Todd Construction has been selected as the General Contractor by using the Two Step Alternate Procurement Process**
2. **Abatement of the Faubion School is complete**
3. **Abatement of the two acquired Concordia houses is complete and the houses are now removed**
4. **Demolition of the Faubion School has begun**
5. **Building Permit expected on or before 19 Feb 16**
6. **SAFETY:**
  - **Recordable Accidents: 0**
  - **Reportable Accidents: 0**

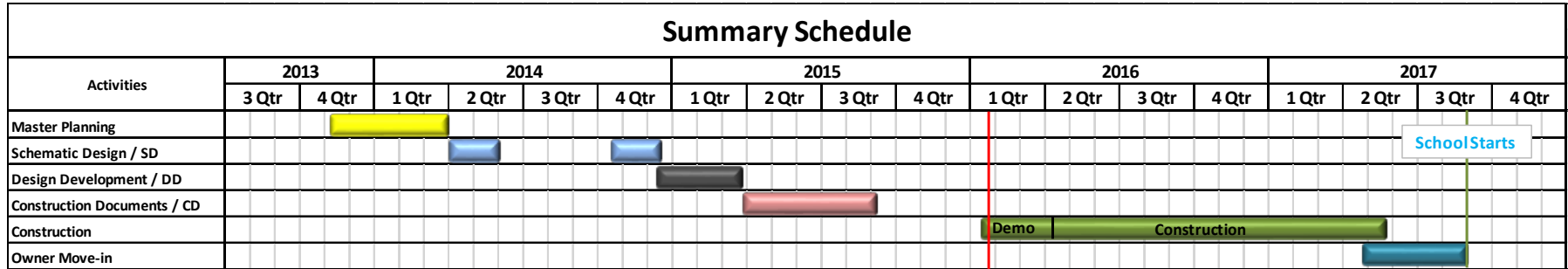
## Photos



Fire Department Training – Pre Demolition



## Schedule



### Significant Schedule Milestone Assessment

Significant Milestone Activity Name	Baseline (BL)		Schedule Update				Actual					
	Start	Finish	Start	Start Delta from BL*	Finish	Finish Delta from BL*	Start	Start Delta from BL*	Start Delta from Update	Finish	Finish Delta from BL*	Finish Delta from Update
Master Planning	4-Oct-13	5-Feb-14	4-Oct-13	0	5-Feb-14	0	9-Nov-13	36	36	31-Mar-14	54	54
Schematic Design / SD	4-Nov-14	6-Jan-15	1-May-14	-187	30-Nov-14	-37	24-Apr-14	-194	-7	17-Dec-14	-20	17
Design Development / DD	5-Feb-15	11-Jun-15	1-Dec-14	-66	30-Apr-15	-42	18-Dec-14	-49	17	27-Mar-15	-76	-34
Request GC Proposals - Step 1	9-Dec-15	9-Dec-15	31-Jul-15	-131	23-Jul-15	-139	30-Jun-15	-162	-31	23-Jul-15	-139	0
Review GC Proposals - Step 1	9-Dec-15	12-Jan-16	24-Jul-15	-138	18-Aug-15	-147	24-Jul-15	-138	0	8-Sep-15	-126	21
Construction Documents / CD	11-Jun-15	2-Nov-15	1-May-15	-41	3-Sep-15	-60	30-Mar-15	-73	-32	4-Sep-15	-59	1
Request GC Proposals - Step 2	14-Oct-15	17-Nov-15	14-Oct-15	0	17-Nov-15	0	15-Oct-15	1	1	3-Dec-15	16	16
Review GC Proposals - Step 2	17-Nov-15	15-Dec-15	17-Nov-15	0	15-Dec-15	0	3-Dec-15	16	16	14-Jan-16	30	30
Land & Building Permits	6-Jan-15	25-Mar-16	27-May-14	-224	19-Feb-16	-35	27-May-14	-224	0			
GC Notice To Proceed	29-Jan-16	29-Jan-16	16-Dec-15	-44	16-Dec-15	-44	14-Jan-16	-15	29	14-Jan-16	-15	29
GC Mobilize to site	13-Jun-16	13-Jun-16	17-Dec-15	-179	17-Dec-15	-179	15-Jan-16	-150	29	15-Jan-16	-150	29
Substantial Completion	25-Apr-17	25-Apr-17	26-May-17	31	26-May-17	31						
Owner Move In	8-Jun-17	10-Aug-17	25-Apr-17	-44	6-Jun-17	-65						

Activity has reached some or all dates

\* Calendar Days

Master Plan	4.7 months
Activity Durations	
SDs	3.9 months
DDs	3.3 months
CDs	5.3 months
Total Design	12.5 months
Construction	16.6 months



**Active Demolition Site**



**Faubion School Demolition**



**Silt Fence Installed on Perimeter**



**Faubion and Concordia Onlookers**

January 2016

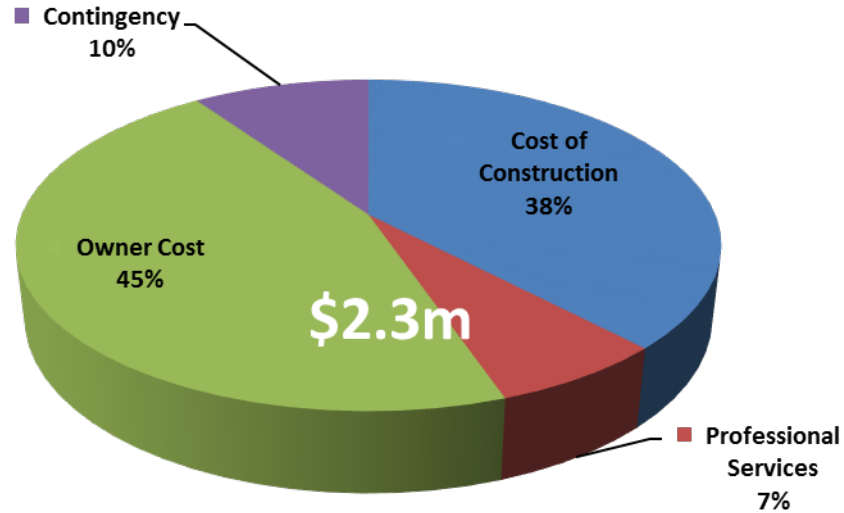


## Project Description

**Brief Project Description:** Campus improvements to facilitate the occupancy by the Faubion PK-8 campus. Improvements are focused on accessibility, safety, and program adjustments for PK-8 users.

**Current Project Phase:** Closeout  
**Construction Start:** May 2015  
**Construction Duration:** 2.2 Months  
**Construction Completion:** August 2015  
**Design Firm:** BOORA Architects Inc.  
**Contractor:** 2KG Contractors Inc.

## Projected Budget Breakout



## Comments

1. Punch list complete and close out process near completion
2. Roof & Drain work scope 95% complete
3. Finalizing quotes on Maker Space furniture purchases
4. SAFETY:
  - Recordable Accidents: 0
  - Reportable Accidents: 0

## Photos





### Project Description

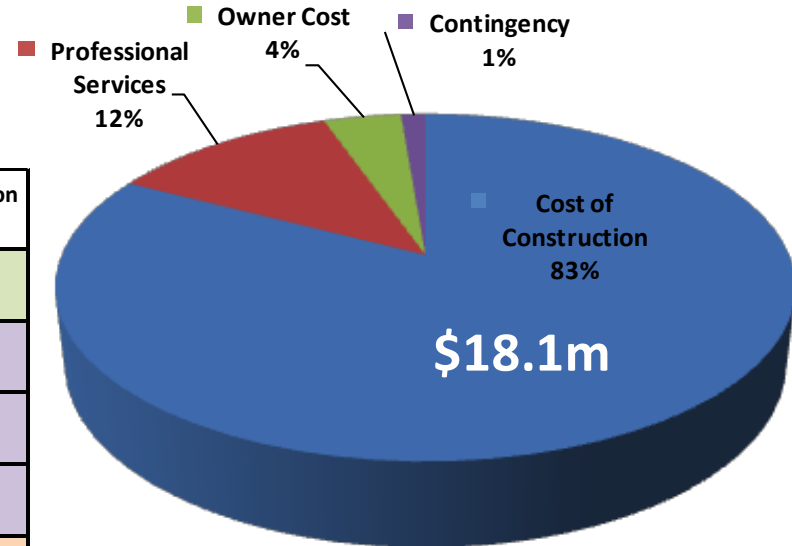
**Project Description:** A multiple site project with multiple construction areas

**Current Project Phase:** Closeout

**Scheduled Completion:** August 2014 for Summer Work

**Construction Duration:** 63 Calendar Days for Summer Work

### Projected Budget Breakout



Design Firm	School	Roof Replacement / Seismic Bracing	Seismic Improvements	Accessibility	Science Classroom Improvements	Construction Package
BLRB	Hosford (6-8)	X	X	X*	X	1
	James John (K-5)	X	X	X*		
FFA	Beach (K-8)		X	X*	X	2
	Woodlawn (PK-8)		X		X	
	Boise-Eliot/Humboldt (PK-8)	X	X		X	3
	Chief Joseph (PK-5)		X			
	King (PK-8)				X	4
	Vernon (PK-8)				X	
Oh Planning	Arleta (K-8)	X	X		X	5
	Creston (K-8)	X	X		X	
	Grout (K-5)		X			6
	Lane (6-8)		X		X	

X\* = Includes Elevator

### Comments

### Photos







## Project Description

**Project Description:** A multiple site project with multiple construction areas

**Current Project Phase:** Construction / Closeout

**Scheduled Completion:** August 2015 (elevators later)

**Construction Duration:** 65 Calendar Days for Summer Work

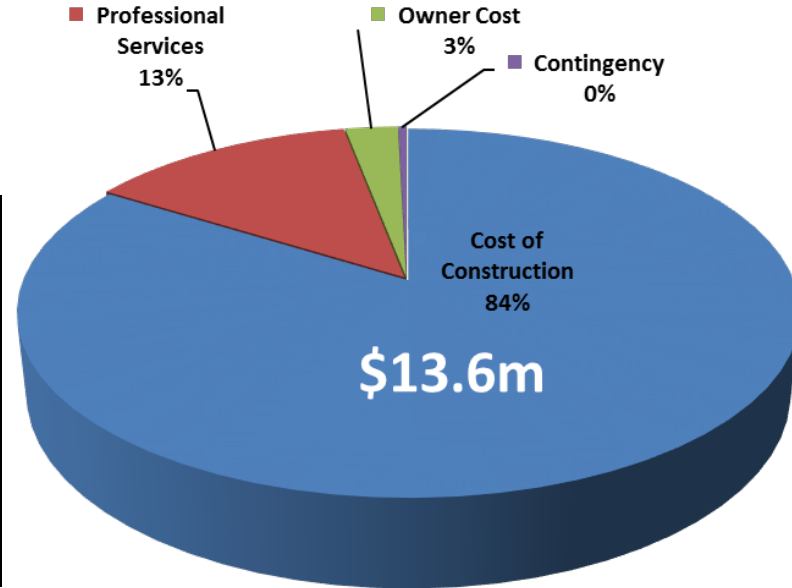
Design Firm	School	Roof Replacement / Seismic Bracing	Seismic Improvements	Accessibility	Science Classrooms Improvements	Construction Package
Oh Planning	Ainsworth (K-5)	X		X*		1
	Woodlawn (PK-8)			X*		
Oh Planning	Hayhurst (K-5)	X			X	2
	Stephenson (K-5)	X				
Oh Planning	Creative Science / Clark (K-8)	X			X	3
	Llewellyn (K-5)		X			
	Buckman (K-5)	X		X		4
	Sabin (PK-8)	X		X	X	

X\* = Includes Elevator

## Comments

1. Summer work, to include the Woodlawn elevator are in close out
2. Ainsworth elevator to be completed no later than April

## Projected Budget Breakout



## Photos



Ainsworth Elevator



### Project Description

**Project Description:** Science Classroom and ADA Upgrades to 18 Schools  
**Current Project Phase:** Closeout  
**Scheduled Completion:** August 2015  
**Construction Duration:** 65 Calendar Days for Summer Work

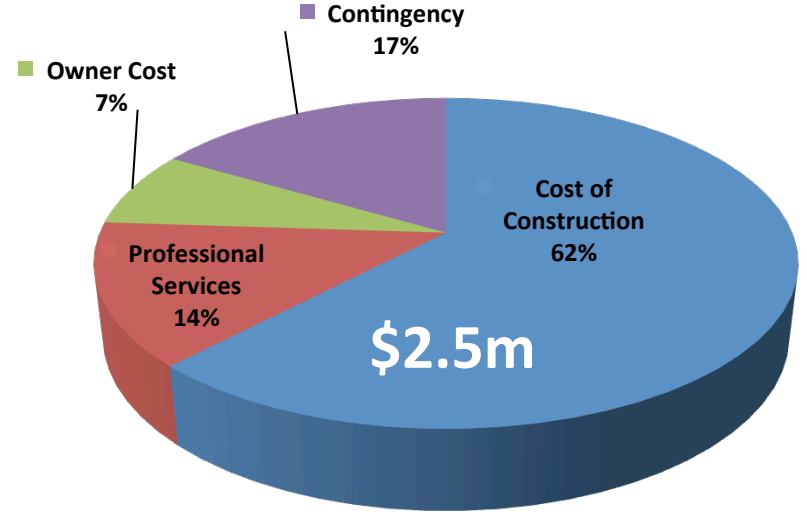
School	ADA	Science Classrooms
Astor		X
da Vinci		X
George		X
Gray		X
Irvington		X
Lee		X
Markham	X	
Meek	X	
Peninsula	X	X

School	ADA	Science Classrooms
Skyline		X
West Sylvan	X	X
Bridger		X
Harrison Park	X	X
Holladay Center	X	
Lent	X	X
Mt. Tabor		X
Richmond	X	
Roseway Heights		X

Contract 1

Contract 2

### Projected Budget Breakout



### Comments

### Photos

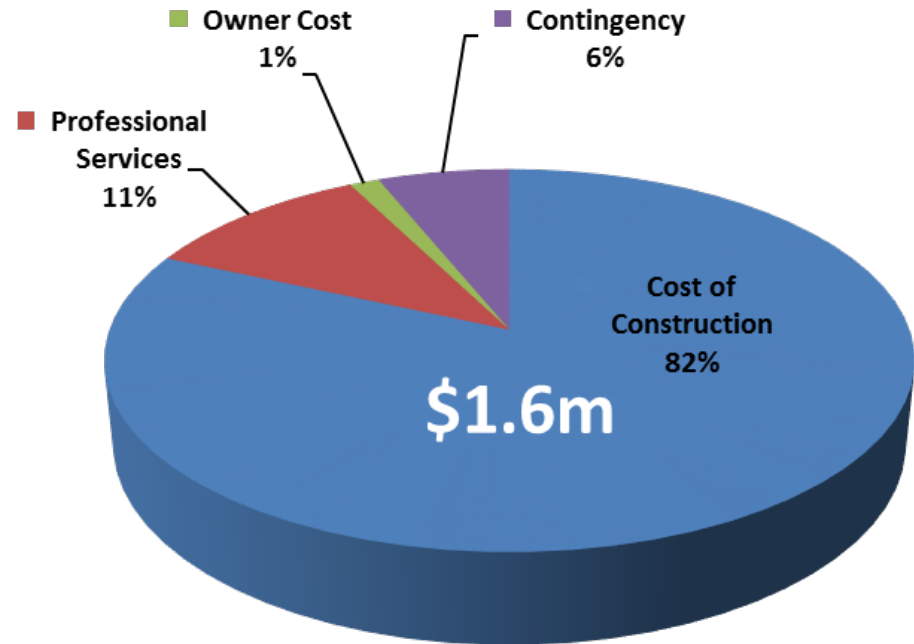




### Project Description

**Project Description:** Improvements to the Maplewood K-5 Roof  
**Current Project Phase:** Closeout  
**Construction Start:** June 2015  
**Construction Duration:** 65 Calendar Days for Summer Work  
**Scheduled Completion:** August 2015  
**Design Firm:** Oh Planning and Design  
**Contractor:** 2KG Contractors

### Projected Budget Breakout



### Comments

### Photos

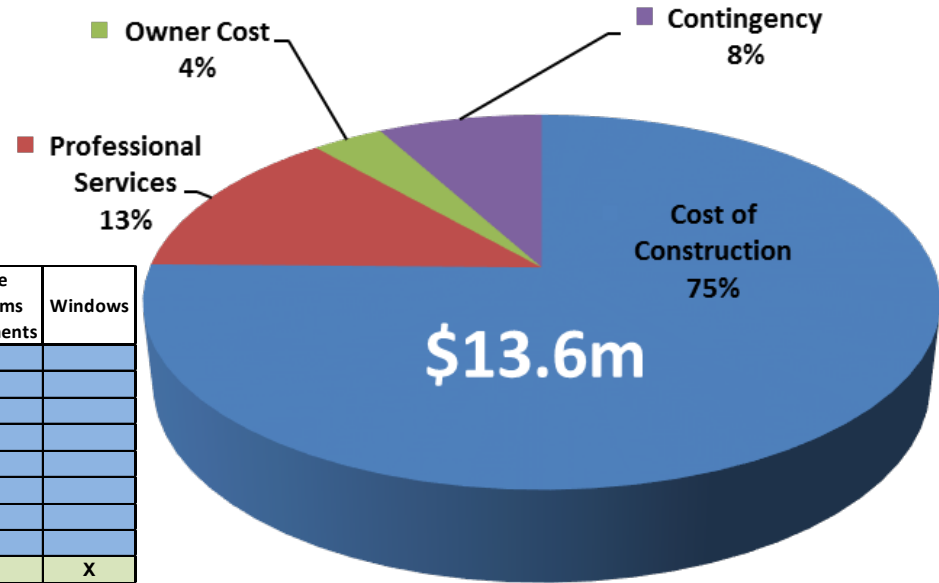




### Project Description

**Project Description:** A 13 site project with multiple construction areas  
**Current Project Phase:** Design  
**Scheduled Completion:** August 2016  
**Construction Duration:** 73 Calendar Days for Summer Work  
**Design Firm:** Oh Planning & BBL  
**Contractor:** TBD

### Projected Budget Breakout



Design Firm	School	Roof Replacement / Seismic Bracing	Seismic Improvements	Accessibility	Science Classrooms Improvements	Windows
BBL	Abernethy (K-5)	X	X			
BBL	Jefferson (9-12)		X	X		
BBL	MLC (K-12)		X	X	X	
BBL	Sellwood (6-8)	X			X	
BBL	Fernwood – Beverly Cleary (2-8)				X	
BBL	Vestal (K-8)				X	
BBL	Winterhaven (K-8)				X	
BBL	Sunnyside (K-8)				X	
OHPD	Hayhurst (K-5)					X
OHPD	Cesar Chavez (K-8)			X*	X	
OHPD	Cleveland (9-12)	X		X		
OHPD	Scott (K-8)			X*	X	
OHPD	Grout (K-5)					X

### Comments

- OHPD has moved into Construction Document phase and is tracking with going out to bid in the 1st week of March
- BBL struggling to maintain the delivery schedule
- Design Estimates for both firms have come in significantly higher than budgeted amounts by 20-30%

### Photos





## Schedule

### Summary Schedule

Activities	2015												2016											
	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec
Planning & Project Assessments																								
Design and Permits																								
Construction Bidding																								
Construction and Move in																								

### Significant Schedule Milestone Assessment

Significant Milestone Activity Name	Baseline (BL)		Schedule Update				Actual					
	Start	Finish	Start	Start Delta from BL*	Finish	Finish Delta from BL*	Start	Start Delta from BL*	Start Delta from Update	Finish	Finish Delta from BL*	Finish Delta from Update
Release Design Firm RFP	9-Feb-15	17-Mar-15	9-Feb-15	0	17-Mar-15	0	9-Feb-15	0	0	17-Mar-15	0	0
Design Notice to Proceed	15-May-15	15-May-15	12-Jun-15	28	12-Jun-15	28	23-Jun-15	39	11	23-Jun-15	39	11
Project Assessment	15-May-15	2-Jul-15	15-May-15	0	15-Sep-15	75	23-Jun-15	39	39	15-Sep-15	75	0
Schematic Design / SD	3-Jul-15	26-Aug-15	21-Jul-15	18	15-Oct-15	50	21-Jul-15	18	0	18-Nov-15	84	34
Design Development / DD	27-Aug-15	25-Oct-15	15-Sep-15	19	25-Nov-15	31	15-Sep-15	19	0			
Construction Documents / CD	26-Oct-15	18-Jan-16	15-Nov-15	20	16-Feb-16	29						
Permit submittal and review	30-Jan-16	29-May-16	17-Feb-16	18	1-May-16	-28						
Request GC Proposals	1-Feb-16	21-Feb-16	15-Mar-16	43	11-Apr-16	50						
Review GC Proposals	22-Feb-16	11-Mar-16	12-Apr-16	50	27-Apr-16	47						
GC Notice To Proceed	25-Mar-16	25-Mar-16	2-May-16	38	2-May-16	38						
Substantial Completion	25-Aug-16	25-Aug-16	20-Aug-16	-5	20-Aug-16	-5						
Elevator Substantial Completion	30-Apr-17	30-Apr-17	1-Mar-17	-60	1-Mar-17	-60						

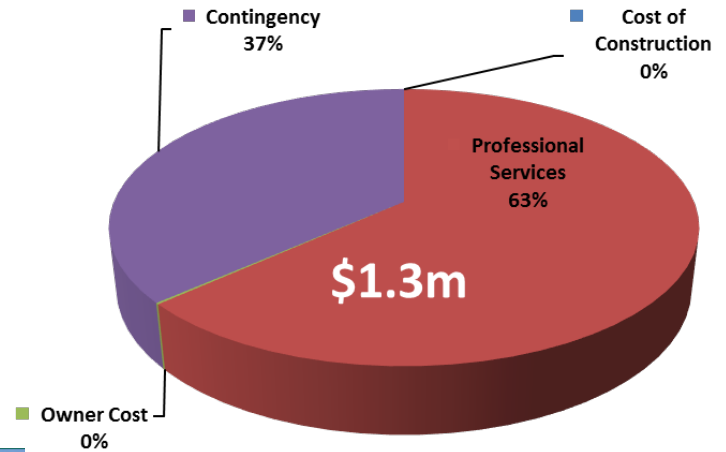
Activity has reached some or all completion dates



### Project Description

**Project Description:** Master Planning for three campuses  
**Current Project Phase:** Pre-Design  
**Scheduled Completion:** June 2016  
**Design Firms:** Benson: DOWA  
 Lincoln: Boora  
 Madison: OPSIS Architecture

### Projected Budget Breakout



### Benson Campus



### Lincoln High School



### Madison High School

### Comments

### Photos

1. The Benson Master Planning Committee is formed and has met
2. The Lincoln Master Planning Committee is formed and has met
3. The Madison design firm has been selected and the Madison Master Planning Committee is formed and will begin in Feb
4. All three master plans to be adopted by the Board of Education no later than June 2016

January 2016





## Schedule

Summary Schedule																					
Activities	2015									2016											
	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	
Benson Campus									Ed Spec		Master Plan										
Lincoln HS																					
Madison HS																					



#	Recommendation	Response	Status
1	Update the Program Management Plan	Concur with Comment	Complete
2	Evaluate the current project scheduling process	Concur	Complete
3	Annual work plan for Heery	Nonconcur	Complete
4	Improve the Balanced Scorecard	Concur/Nonconcur	Complete
5	Better match the AG's Model Public Contracts Rules	Concur with Comment	Working
6	Consider adopting the Attorney General's Model Contracting Rules	Concur	Complete
7	Consider increasing the change order authority	Concur with Comment	Complete
8	ITB language and unit prices	Concur	Complete
9	Lowest responsible bid will be based upon Base Bid and Alternatives	Concur	Complete
10	Specify a maximum allowable profit & overhead for Change Order pricing	Concur with Comment	Complete
11	Revise RFP ranking methodology	Concur with Comment	Complete
12	RFP scoring guidelines for specific categories	Concur	Complete
13	Consider increasing the share of deductible per Builders Risk occurrence	Concur with Comment	Complete
14	CM/GC services RFP revisions	Concur	Complete
15	More proscriptive guidelines for the CM/GC to procure subcontracts	Concur	Working
16	Clarify GMP cost refinements	Concur	Complete
17	Clarify District intent for P&OH to be allowed to the CM/GC for changes	Concur with Comment	Working
18	Improve the efficiency of the master planning and design efforts	Concur	Working
19	Complete PPS Design Standards and Guidance	Concur	Complete
20	Project plans and SOPs be developed and implemented by the end of calendar year 2014	Concur	Complete
21	e-Builder filing and indexing	Concur	Complete
22	Streamlined RFI steps	Concur with Comment	Complete
23	Validate PCO process before IP 2014 change order work proceeds	Concur with Comment	Complete
24	Responsibility by Participant Matrix	Concur	Complete
25	PeopleSoft & e-Builder compatibility	Concur	Complete
26	Update and revise the bond communication plan	Concur	Complete
27	Improve public engagement	Concur with Comment	Complete

**This Report 96% Complete – Last Report 96% Complete**





#	Abbreviated Recommendation	Response	Status
1	OSM should ensure that change order work occur only upon appropriately authorized change order execution	Concur	Working
2	Streamline the submittal process on e-Builder	Concur	Complete
3	Incorporate appropriate design recommendations from IP lessons learned	Concur	Complete
4	Develop plans for utilizing available contingencies and reserves	Concur with comment	Complete
5	Establish written policies and procedures in the SOP pertaining to GMP spending	Concur with comment	Complete
6	Consider increasing the funding for master planning	Concur with comment	Complete
7	Fully involve user groups and stakeholders in updating the LRFP and Ed Specs	Concur	Complete
8	Update the currently posted PMP	Concur	Complete
9	Critical elements of the PTMP should be put in place at the beginning of each project	Concur	Complete
10	Only use escalation reserve to fund scope changes when escalation will not be needed for other projects	Complete	Complete
11	OSM should continue to develop systems for uniform filing of documents in e-Builder	Concur with comment	Complete
12	Clarify where and when SOP requirements and procedures are proscribed for CM/GC and D-B-B projects	Concur	Complete
13	Revise the SOP to provide greater explanation of and requirements for value engineering, Project Safety and Security Plans, Site Safety Plans, and project quality	Concur	Working
14	Update the SOP to provide more detailed and accurate information with respect to the alternative contracting	Concur	Working
15	OSM should clarify which projects require the use of 1.5 percent for green technology	Concur	Working
16	OSM should consider revising elements of the budget perspective reporting	Nonconcur	Complete
17	OSM should identify opportunities for savings in payroll and management support line items	Concur with comment	Complete
18	OSM should consider adding specific statutory responsibility requirements to future ITBs	Complete	Complete
19	OSM/P&C should ensure that RFPs clearly state the criteria and weighting for making a choice of one or more firms if an RFP permits one or more firms to be selected by an RFP	Complete	Complete
20	OSM and FAM should consider internal training sessions on public contract procurement law	Concur	Complete
21	Begin work only with signed and executed contracts	Concur	Complete
22	OSM should remove article 19e from existing and future CM/GC contracts	Concur	Complete
23	OSM should modify contract language to specify how early work may occur	Complete	Complete
24	Project communication plans are to be prepared at the start of new projects	Concur	Working
25	OSM and PPS academic leadership should jointly develop an involvement plan	Concur	Working
26	- Provide more flexibility in the selection of subcontractors PPS contracts - Obtain a written legal opinion about best practices and risks addressing the MWESB aspirational goal	Concur with comment	Complete

**This Report 77% Complete – Last Report 50% Complete**



## BAC Discussion

Next Board Presentation

or

Next BAC Meeting

Place: