



**Board School Improvement Bond Committee Agenda**  
**November 7, 2019**  
**4:30 p.m. – 6:00 p.m.**  
**Willamette Conference Room**

**Committee Members**

Chair - Andrew Scott  
Scott Bailey  
Amy Kohnstamm

1. Introductions
2. Public Comment – (5) Two-minute slots (10 minutes)
3. Acknowledge Previous Meeting’s Minutes

**2012/2017 Bond Topics**

4. BAC board presentation.
  - a. Discuss if BAC should present to subcommittee or at regular board session.
5. BAC liaison
  - a. Discuss board BAC liaison.
6. BAC recruitment.
  - a. Discuss goals for BAC recruitment.
7. Bond performance audit presentations:
  - a. BAC: 10/9/19
  - b. Bond subcommittee: 11/21/19
  - c. Audit subcommittee: TBD
  - d. BOE: N/A
8. 2012 bond savings:
  - a. Review potential savings and potential uses.
  - b. OSM to provide potential decision making criteria.
9. Teen parent & health clinics
  - a. Discuss the need for teen parent centers and health clinics in high schools.
  - b. Presenter: TBD

**Bond Planning Topics**

10. Bond planning team updates:
  - a. Schedule Review Dan Jung
  - b. Finance Team Update Cynthia Le
  - c. Facilities Team Update Dan Jung + Marina Cresswell
  - d. Educational Team Update Dan Jung
  - e. Capacity Team Update Claire Hertz + FLO
  - f. Communication / Engagement Team David Roy
11. Bond planning schedule review and discussion

**Other Topics**

12. Subcommittee charter
  - a. Discuss expectations for drafting, review and approval.
13. Adjourn



**PORTLAND PUBLIC SCHOOLS**  
**OFFICE OF OPERATIONS**

501 North Dixon Street / Portland, OR 97227  
Telephone: (503) 916-3211

Date: November 4, 2019  
To: School Board  
From: Dan Jung, Chief Operating Officer  
Subject: Future Capital Construction Bond

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PPS staff have been in the process of preparing information and documentation for a potential future capital construction bond. Staff has engaged in the discussion of optimal timing to place a future capital construction bond on a voter's ballot. After considerable review and discussion, the Bond Planning Steering Team is recommending PPS plan for a bond vote in November 2021. The attached documents outline some of the considerations discussed.

- 2020 Bond Planning Schedule - DRAFT
- 2021 Bond Planning Schedule - DRAFT
- Considerations List 2020/2021 - DRAFT

Staff is available to discuss in detail at the Board's convenience.

Note: the Bond Planning Steering Team consists of the following staff:

- Stephanie Soden, Executive Chief of Staff
- Claire Hertz, Deputy Superintendent
- Kregg Cuellar, Deputy Superintendent
- Cynthia Le, Chief Financial Officer
- Russell Brown, Chief of System Performance
- David Roy, Senior Director of Communications
- Dan Jung, Chief Operating Officer

Bond Timing Considerations		11/5/19
<b>DRAFT DOCUMENT. MAY CONTAIN INACCURATE OR UNCONFIRMED DATA.</b>		
	<b>PRO - 2020</b>	<b>PRO - 2021</b>
<b>CONSIDERATION</b>		
<b>COMMUNITY ENGAGEMENT</b>		PPS is committed to robust and comprehensive community engagement, specifically for underserved communities. The visioning process provided a model for how to effectively engage the community as a whole. It will take significant time and resources to plan and execute a meaningful community engagement plan that includes all stakeholders and communities. Additionally it may take months to form and engage a Bond Development Committee. A vote in 2021 will allow more time to engage with community and develop a bond package based upon feedback and priorities.
<b>CONSISTENT COMMUNICATION</b>	PPS's Long Range Facilities Plan identifies a goal of bond votes every presidential election. Additionally the district has consistently message a "2020 bond".	
<b>STAKEHOLDER SUPPORT</b>	It's generally considered preferable to hold a vote on a presidential election.	The May 2017 bond vote provided evidence an "off" election vote can receive support from stakeholders.
<b>FUNDING NEEDS</b>		The current bond projects are scheduled as such to not require additional bond sales until after a November 2021 election.
<b>IF THE BOND DOES NOT PASS</b>	If the vote does not pass, a fail vote in November 2020 will allow time to "re-package" a new bond before funding is necessary.	If the 2021 bond vote does not pass, there will be less time to secure bridge funding.
<b>STAFF, STAKEHOLDER AND COMMUNITY CAPACITY</b>		<p>PPS is currently engaged in a number of meaning and substantive efforts that require thoughtful consideration, as well as significant staff resources and community input. Current efforts include (but are not limited to):</p> <ul style="list-style-type: none"> <li>- District Strategic Plan</li> <li>- Student Success Act Implementation</li> <li>- Enrollment Balancing &amp; Middle School Programming</li> <li>- DLI / Focus Option Review</li> <li>- High School Master Planning</li> </ul> <p>Successfully developing a thoughtful bond package with community input by November 2020 may be difficult to achieve for all stakeholders considering the other activities underway. A vote in 2021 will allow more time to engage staff and plan a future bond ask.</p>
<b>SEQUENCING OF ACTIVITIES</b>		<p>A number of efforts are either underway or are about to be underway that would help inform a bond package. Efforts include:</p> <ul style="list-style-type: none"> <li>- Enrollment Balancing &amp; Middle School Programming</li> <li>- DLI / Focu Option Review</li> <li>- High School Master Planning</li> <li>- District Wide Facility Condition Assessment</li> <li>- ADA Transition Planning</li> <li>- District Wide Long Range Facilities Plan Update</li> <li>- District Wide Capital Plan (5-yr / 10-yr)</li> </ul> <p>A bond vote in November 2021 will allow additional time for these efforts to be further developed, finalized and/or reviewed/digested and support bond planning efforts.</p>
<b>PROJECT COMPLETION TIMELINES</b>		Kellogg and Madison will be completed in Fall 2021.

CONSIDERATION	PRO - 2020	PRO - 2021
<b>BENSON COST ESTIMATE</b>		Benson will have a final contract amount (and therefore a more accurate cost estimate) by summer 2021. A final contract amount will allow for a more specific budget amount to be identified necessary to "finish" the Benson project.
<b>VOTER COMPETITION</b>		The November 2020 ballot is shaping up to be a busy ballot (with specific consideration to the potential Metro bond). The more items competing for votes is generally considered to be a detriment to a bond vote.
<b>PPS VOTER REQUESTS</b>		Requests of voters can be viewed as burdensome to some community members. A vote in November 2021 will provide additional "distance" between the 2019 levy vote and another bond ask.

**2021 BOND SCHEDULE - ROUGH DRAFT**

	2019			2020												2021											
	OCT	NOV	DEC	JAN	FEB	MAR	APR	MAY	JUN	JUL	AUG	SEP	OCT	NOV	DEC	JAN	FEB	MAR	APR	MAY	JUN	JUL	AUG	SEP	OCT	NOV	DEC
BOND FINANCING PLAN	█	█																									
REVIEW DISTRICT ENROLLMENT/CAPACITY NEEDS AND MAKE RECOMMENDATIONS	█	█	█	█	█	█	█	█	█	█	█	█	█	█													
REVIEW AND PRIORITIZE DISTRICT EDUCATIONAL SPACE NEEDS AND MAKE RECOMMENDATIONS	█	█	█	█	█	█	█	█	█	█	█	█	█	█													
REVIEW AND PRIORITIZE DISTRICT PHYSICAL FACILITY NEEDS AND MAKE RECOMMENDATIONS	█	█	█	█	█	█	█	█	█	█	█	█	█	█													
COMPLETE HIGH SCHOOL MASTER PLANS *	█	█	█	█																							
BOND ACCOUNTABILITY COMMITTEE				█				█				█			█			█									
POLLING					█				█			█	█			█	█										
COMMUNITY ENGAGEMENT											█	█	█	█	█	█	█	█	█								
BOND DEVELOPMENT COMMITTEE										█		█	█		█			█									
FINALIZE BOND LANGUAGE																				█							
SUBMIT BALLOT																								█			
<b>VOTE</b>																									█	█	
<b>OTHER ACTIVITIES</b>																											
PPS LEVY VOTE		█																									
STRATEGIC PLAN	█	█	█	█	█																						
FACILITIES CONDITION ASSESSMENT	█	█	█																								
DLI / FOCUS OPTION REVIEW	█	█	█																								
ENROLLMENT BALANCING & MS PROGRAMMING - DATA ANALYSIS	█	█	█	█	█	█	█	█	█	█	█	█	█	█	█	█	█	█	█	█	█	█	█	█	█	█	
ENROLLMENT BALANCING & MS PROGRAMMING - COMMUNITY ENGAGEMENT	█	█	█	█	█	█	█	█	█	█	█	█	█	█	█	█	█	█	█	█	█	█	█	█	█	█	
STUDENT SUCCESS ACT IMPLEMENTATION	█	█	█	█	█	█	█	█	█	█	█	█	█	█	█	█	█	█	█	█	█	█	█	█	█	█	
LRFP UPDATE (AFTER FCA & ENROLLMENT)	█	█	█	█	█	█	█	█	█	█	█	█	█	█	█	█	█	█	█	█	█	█	█	█	█	█	
CAPITAL PLANNING (5-YR / 10-YR)	█	█	█	█	█	█	█	█	█	█	█	█	█	█	█	█	█	█	█	█	█	█	█	█	█	█	
KELLOGG MODERNIZATION	█	█	█	█	█	█	█	█	█	█	█	█	█	█	█	█	█	█	█	█	█	█	█	█	█	█	
MADISON MODERNIZATION	█	█	█	█	█	█	█	█	█	█	█	█	█	█	█	█	█	█	█	█	█	█	█	█	█	█	
LINCOLN MODERNIZATION	█	█	█	█	█	█	█	█	█	█	█	█	█	█	█	█	█	█	█	█	█	█	█	█	█	█	
BENSON MODERNIZATION	█	█	█	█	█	█	█	█	█	█	█	█	█	█	█	█	█	█	█	█	█	█	█	█	█	█	

\* Jefferson, Cleveland, Wilson, Grant "bowl"

**2020 BOND SCHEDULE - ROUGH DRAFT**

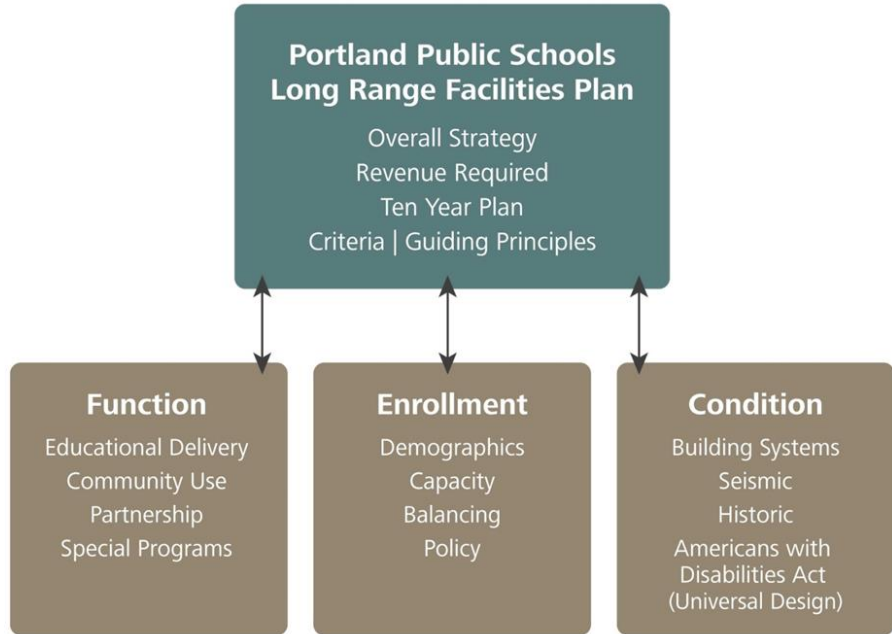
	2019			2020												2021												
	OCT	NOV	DEC	JAN	FEB	MAR	APR	MAY	JUN	JUL	AUG	SEP	OCT	NOV	DEC	JAN	FEB	MAR	APR	MAY	JUN	JUL	AUG	SEP	OCT	NOV	DEC	
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\* Jefferson, Cleveland, Wilson, Grant "bowl"

bond planing update

11.07.2019

# long range facilities plan



The purpose of the plan is to **evaluate** the adequacy of existing educational facilities, **plan for future** capital facilities spending and address how the student population will be housed

**principal guiding document for facility planning**

The screenshot shows the Portland Public Schools website. The header includes the PPS logo, the name "PORTLAND PUBLIC SCHOOLS", the location "Portland, Oregon", and the address "501 N. Dixon St • Portland, OR 97227 • (503) 916-2000". Navigation icons for Calendar, Enroll, and Contact are visible. The main navigation menu includes About, Schools & Learning, Services, Volunteer, Jobs, Board, and Departments. The "Facilities & Asset Management" section is active, showing a sidebar with various links like "Building Use (Civic Use of Buildings)", "Building Use Guidelines-Compliance", "Custodial Services", "Design Guidelines & Standards", "Education Specifications", "Electrical Load Reduction", "Furniture & Moves", "Keep Your Buildings Safe", "Long Range Facilities Plans", "Maintenance Services", "Maps & Data", and "Project & Construction Management". The main content area features a banner for the "Long Range Facilities Plan" and introductory text explaining the plan's purpose and the board's resolution.

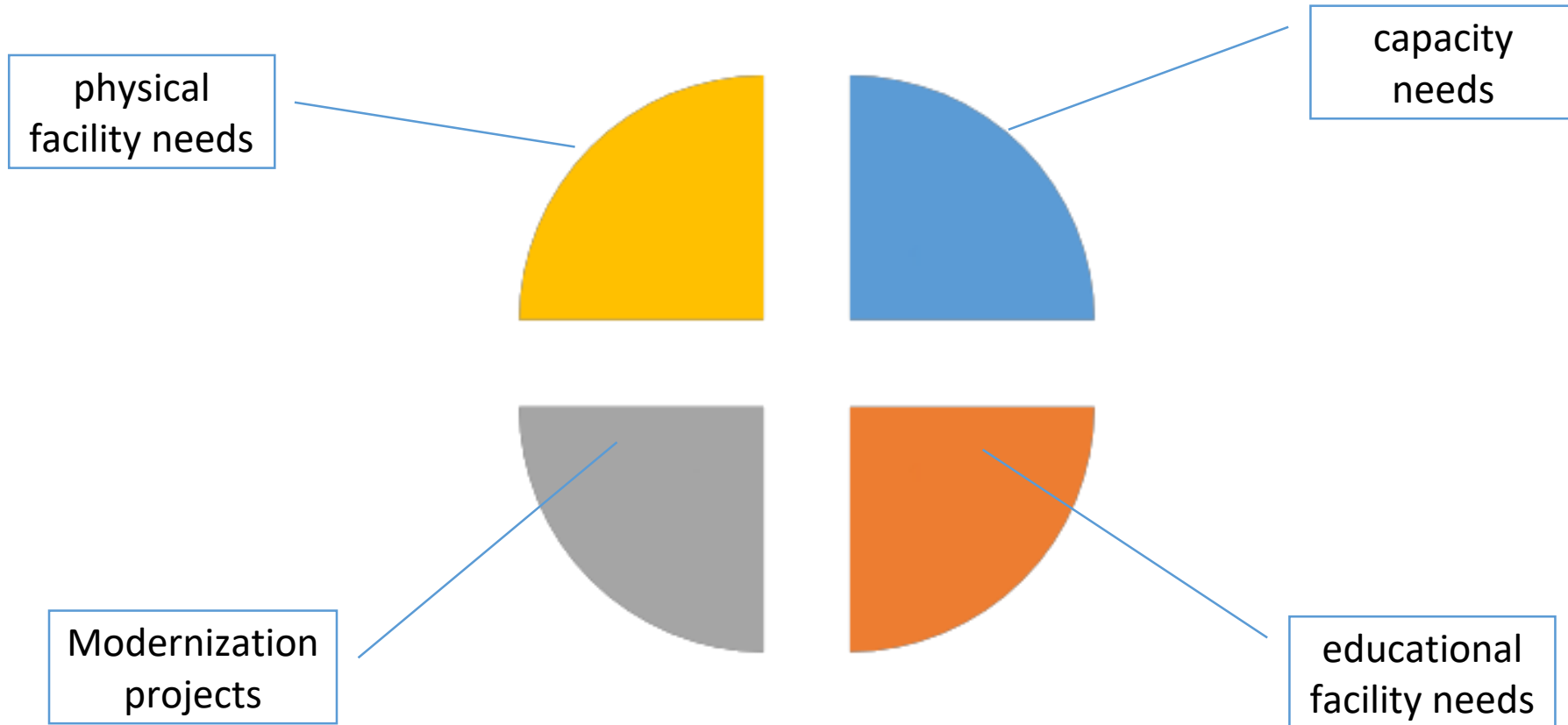
<https://www.pps.net/Page/954>

The screenshot shows the Oregon Revised Statutes page for school facility plans for large school districts. The page title is "School facility plan for large school districts". The page includes a navigation menu with "Text", "News", "Annotations", and "Related Statutes". The main content is a list of five numbered items:

- (1) As used in this section, "large school district" means a school district that has an enrollment of over 2,500 students based on certified enrollment numbers submitted to the Department of Education during the first quarter of each new school year.
- (2) A city or county containing a large school district shall:
  - (a) Include as an element of its comprehensive plan a school facility plan prepared by the district in consultation with the affected city or county.
  - (b) Initiate planning activities with a school district to accomplish planning as required under ORS 195.020 (Special district planning responsibilities).
- (3) The provisions of subsection (2)(a) of this section do not apply to a city or a county that contains less than 10 percent of the total population of the large school district.
- (4) The large school district shall select a representative to meet and confer with a representative of the city or county, as described in subsection (2)(b) of this section, to accomplish the planning required by ORS 195.020 (Special district planning responsibilities) and shall notify the city or county of the selected representative. The city or county shall provide the facilities and set the time for the planning activities. The representatives shall meet at least twice each year, unless all representatives agree in writing to another schedule, and make a written summary of issues discussed and proposed actions.
- (5) (a) The school facility plan must cover a period of at least 10 years and must include, but need not be limited to, the following elements:



# scopes of work



# the schedule - current **DRAFT**

	2019			2020												2021							
	OCT	NOV	DEC	JAN	FEB	MAR	APR	MAY	JUN	JUL	AUG	SEP	OCT	NOV	DEC	JAN	FEB	MAR	APR	MAY	JUN	JUL	
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LINCOLN MODERNIZATION																							
BENSON MODERNIZATION																							

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## bond planning teams

steering team

finance team

educational adequacy team

capacity team

facilities team

communications & engagement team

## team updates

steering team

finance team

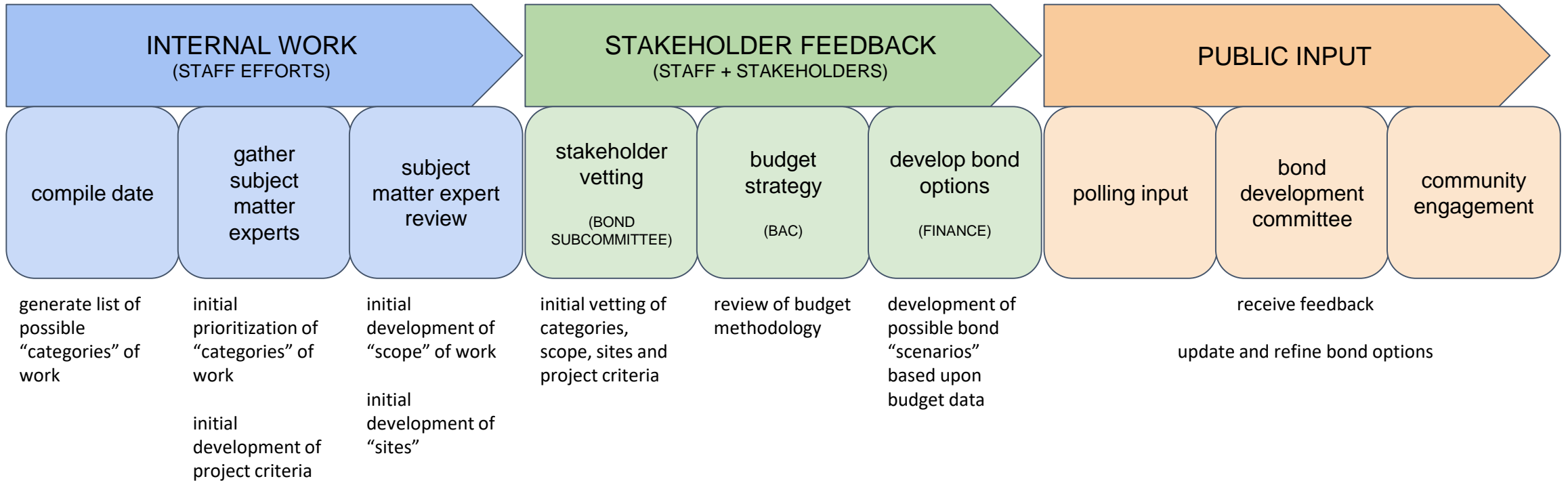
educational adequacy team

capacity team

facilities team

communications & engagement team

# educational adequacy + facilities the process

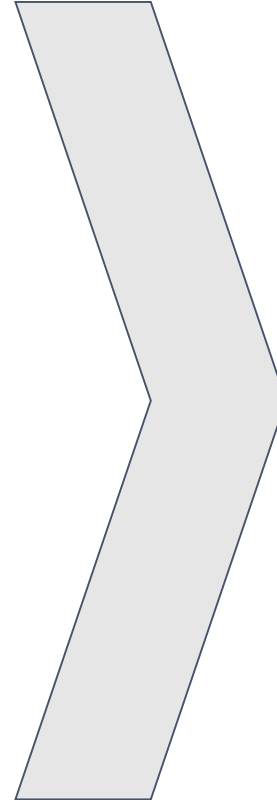


educational adequacy + facilities  
compile data

review data

discuss know deficiencies

review priorities



generate list of  
possible "categories"  
of work

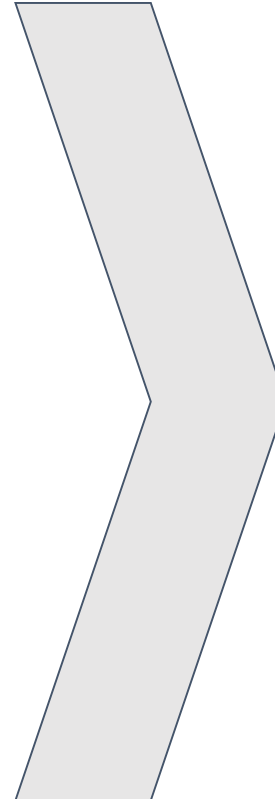
educational adequacy + facilities  
gather experts

work orders

system assessments

facility condition assessment

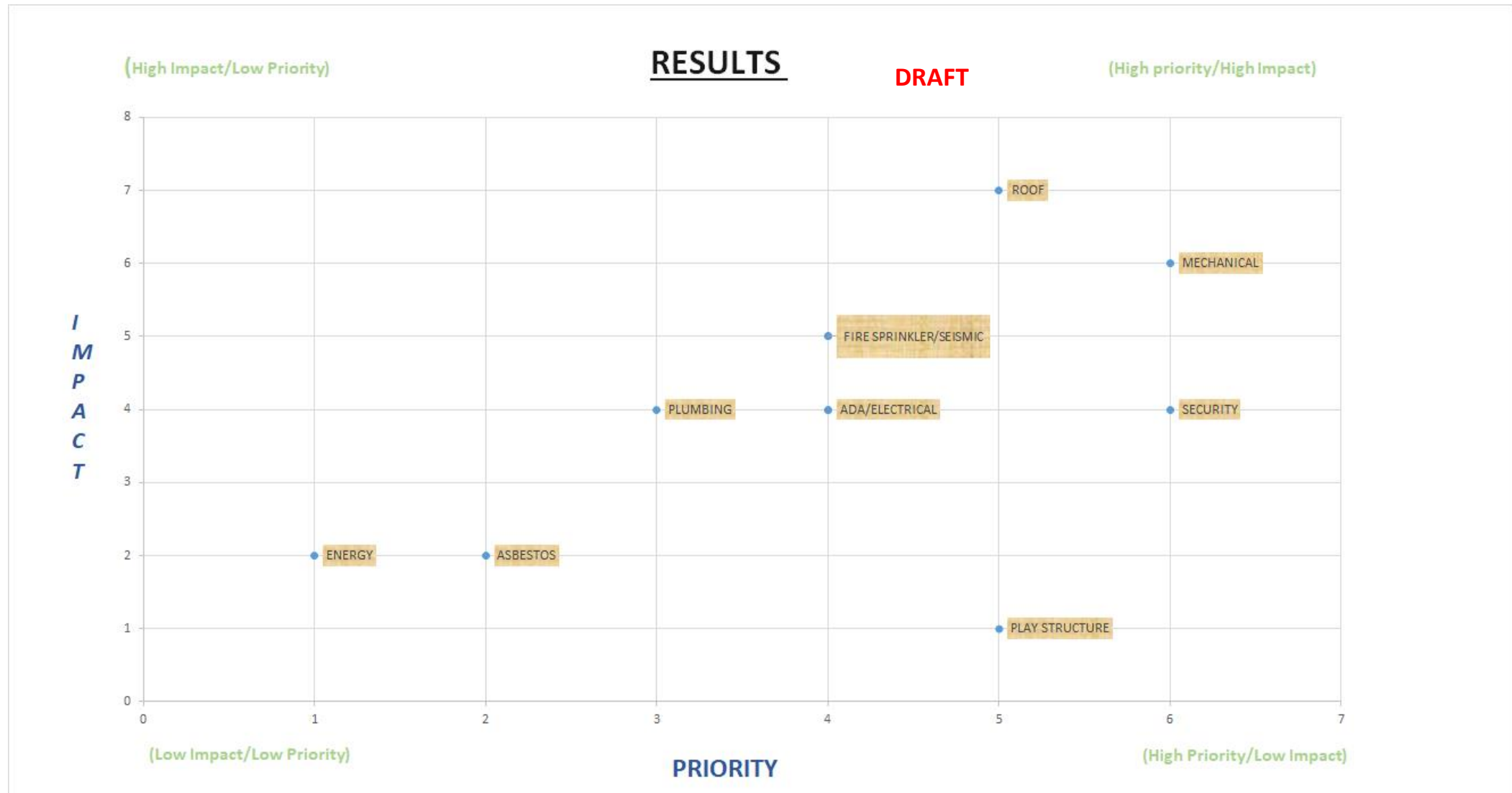
etc



initial prioritization of  
“categories” of work

initial development of  
project criteria

educational adequacy + facilities  
gather experts





educational adequacy + facilities  
gather experts

## category of work

HIGHER PRIORITY
ROOF
MECHANICAL
SECURITY
SEISMIC
FIRE SPRINKLERS
ADA
ELECTRICAL
PLUMBING
PLAY STRUCTURES
ASBESTOS
ENERGY
PAVING
FLOORING
LOWER PRIORITY

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OTHERS
STAGE RIGGING
NUTRITION SERVICES
STORMWATER MGMT
PAINT
EXTERIOR SKIN

educational adequacy + facilities  
gather experts

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FCA's "worst" condition

1. SPED
2. Music
3. Art
4. Security
5. PE

Team's Draft Priorities

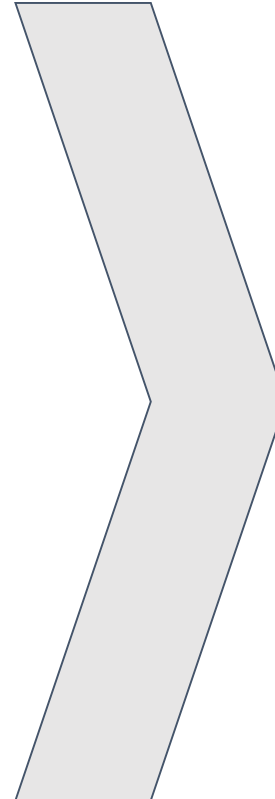
1. Security
2. Technology
3. SPED
4. Restrooms
5. PE

Others

- RHS Phase 4
- Grant "bowl"
- VE "put backs"
- Athletics
- PD space
- FF&E
- CTE labs

educational adequacy + facilities  
expert review

subject matter experts  
review draft work priorities  
and begin to develop  
detailed scope of work



initial development of  
“scope” of work

initial development of  
“sites”

# educational adequacy + facilities expert review

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	CATEGORY	SCOPE? EG:	SITES? EG:	DATA	\$\$
jere	ROOF	FULL REPLACEMENT	WORST CONDITION	FCA	
jere	MECHANICAL	BOILER REPLACEMENT			
molly	SECURITY	DOOR LOCKS / CAMERAS / ALARM PANELS	ALL SITES	NEW DAWN	
jen s	SEISMIC	ALLOCATION FOR MATCHING FUNDS	WORST CONDITION	ASCE	
jere	FIRE SPRINKLERS	CORRIDORS	K-2		
paul	ADA				
jere	ELECTRICAL				
jere	PLUMBING				
jere / risk	PLAY STRUCTURES				
darren	ASBESTOS				
aaron	ENERGY	LED REPLACEMENTS	HIGHEST COST SAVINGS		
patrick	PAVING	500+ SF PATCHING	WORST CONDITION	WOs	
jere	FLOORING				

**Category → Scope → Site → Budget**

# educational adequacy + facilities expert review

PHYSICAL FACILITY IMPROVEMENTS												
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CATEGORY OF WORK	SCOPE OF WORK (WHAT NEEDS TO BE DONE)	SITES (WHICH SCHOOLS WOULD BE INCLUDED)	DATA SOURCE	GOALS	PRINCIPLES	CRITERIA	STAFF LEAD	SUBJECT EXPERT	\$	\$\$	O&M FUNDING	
ROOF	FULL ROOF REPLACEMENTS	SCHOOLS WITH WORST ROOF CONDITION	FCA / WO <sub>s</sub> / ASSESSMENTS				JERE	MIKE S				
MECHANICAL	BOILER REPLACEMENT	SCHOOLS WITH MOST MECHANICAL ISSUES	FCA / WO <sub>s</sub>				JERE	STEVE N				
SECURITY	DOOR LOCKS / CAMERAS / ALARM PANELS	ALL SCHOOLS TO RECEIVE LIKE IMPROVEMENTS	FCA / ASSESSMENTS				MOLLY	MOLLY				
SEISMIC	INCREMENTAL SEISMIC IMPROVEMENTS	SCHOOLS WITH WORST SEISMIC CONDITION AND AVAILABLE TO RECEIVE MATCHING FUNDS					DAN	JEN				
FIRE SPRINKLERS	NEW SPRINKLES IN CORRIDORS	K-2					JERE	STEVE N				
ADA	RAMPS, ELEVATORS, DOOR HARDWARE, ETC	UTILIZE THE ADA TRANSITION PLAN TO IDENTIFY HIGHEST NEEDS					DANA	PAUL				
ELECTRICAL	INCREASE ELECTRICAL CAPACITY	SCHOOLS WITH OUTDATED PANELS					JERE	BRIAN T				
PLUMBING	REPIPE AND OR REPAIR	SCHOOLS WITH WORST PLUMBING CONDITION					JERE	STEVE N				
PLAY STRUCTURES	REPLACE AGING STRUCTURES	SCHOOLS WHERE PLAY STRUCTURE PARTS ARE NO LONGER MANUFACTURED					JERE	JOE + JERE				
ASBESTOS	REMOVE/REPLACE PIPING,BOILER INSULATION,SPRAY ON FIREPROOFING	ALL SCHOOL FACILITIES BUILT PRIOR TO 1980					JERE	DARREN				
ENERGY	LED LIGHTING, HVAC CONTROLS, MECHANICAL IMPROVEMENTS	SCHOOLS WITH THE HIGHEST NEED AND HIGHEST RETURN ON INVESTMENT					PATRICK	AARON				
PAVING	500+ SF PATCHING	WORST CONDITION					PATRICK	PATRICK				
FLOORING	REPLACE CARPET,GYM FLOORS,WORN HARD SURFACES	SCHOOLS WITH WORST FLOORING CONDITION					JERE	MIKE S				
EDUCATIONAL FACILITY IMPROVEMENTS												
CATEGORY OF WORK	SCOPE OF WORK (WHAT NEEDS TO BE DONE)	SITES (WHICH SCHOOLS WOULD BE INCLUDED)	DATA SOURCE	GOALS	PRINCIPLES	CRITERIA	STAFF LEAD	SUBJECT EXPERT	\$	\$\$	O&M FUNDING	
SPEL CLASSROOMS	ACOUSTIC SEPARATION, TECH BUNDLES, PARTITIONS, SOFT SEATING, ETC	SITES WITH WORST CONDITION SCORES	FCA - ED SUITABILITY				JOHN	MARY				
TECHNOLOGY							DON	DON				
PE			FCA - ED SUITABILITY				MARSHALL?	SARAH DAVIS + JENNY W				
ALL USER RESTROOMS			FCA - ED SUITABILITY				MEGAN	NICOLE KAPPES -LEVINE				
MUSIC			FCA - ED SUITABILITY				JOHN	KRISTEN BRYSEN + JOHN				
ART			FCA - ED SUITABILITY				JOHN	KRISTEN BRYSEN + JOHN				
FF&E	NEW CAFETERIA TABLES/NEW CLASSROOM FURNITURE/BESC	FHS/FAUBION/GHS/RHS. SABIAN,BEAUMONT	FCA - ED SUITABILITY				DANA	JULIE				
ATHLETICS												
NEW CAPACITY												
CATEGORY OF WORK	SCOPE OF WORK (WHAT NEEDS TO BE DONE)	SITES (WHICH SCHOOLS WOULD BE INCLUDED)	DATA SOURCE	GOALS	PRINCIPLES	CRITERIA	STAFF LEAD	SUBJECT EXPERT	\$	\$\$	O&M FUNDING	
SMITH SCHOOL												
SCHOOL ADDITIONS												
MODERNIZATION												
CATEGORY OF WORK	SCOPE OF WORK (WHAT NEEDS TO BE DONE)	SITES (WHICH SCHOOLS WOULD BE INCLUDED)	DATA SOURCE	GOALS	PRINCIPLES	CRITERIA	STAFF LEAD	SUBJECT EXPERT	\$	\$\$	O&M FUNDING	
CLEVELAND HIGH SCHOOL	FULL MODERNIZATION	CLEVELAND HIGH SCHOOL	MASTER PLAN									
JEFFERSON HIGH SCHOOL	FULL MODERNIZATION	JEFFERSON HIGH SCHOOL	MASTER PLAN									
WILSON HIGH SCHOOL	FULL MODERNIZATION	WILSON HIGH SCHOOL	MASTER PLAN									
OTHER ITEMS THAT HAVE COME UP												
CATEGORY OF WORK	SCOPE OF WORK (WHAT NEEDS TO BE DONE)	SITES (WHICH SCHOOLS WOULD BE INCLUDED)	DATA SOURCE	GOALS	PRINCIPLES	CRITERIA	STAFF LEAD	SUBJECT EXPERT	\$	\$\$	O&M FUNDING	
FOREST PARK ADDITION (REPLACE MODULARS)												
CLASSROOM RECONFIGURATION (WEST SYLVAN AND STEVENSON)												
VALUE ENGINEERED ITEMS FROM FRANKLIN, ROOSEVELT AND GRANT												
UPGRADED PHONE SYSTEM (DISASTER RESPONSE SUPPORT)												
NEW FINANCIAL SYSTEM OF RECORD												

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## educational adequacy + facilities potential criteria

### long range facilities plan

- guiding principles
- goals
- recommendations

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### project criteria

- student impact
- racial equity & social justice
- authority having jurisdiction
- facility conditions
- visibility
- operational cost savings
- risk assessment

educational adequacy + facilities  
potential criteria

## long range facilities plan - goals

- Every PPS school shall provide an **equitable and effective learning environment** that maximizes the achievement of every student.
- Every PPS school shall be **safe, healthy, accessible** and designed to meet students' essential needs.
- PPS shall optimize utilization of all schools while taking the **academic program** needs of each school into account.

educational adequacy + facilities  
potential criteria

## long range facilities plan - guiding principles

- Develop partnerships
- Embrace sustainability
- Demonstrate fiscal responsibility
- Practice inclusivity



## educational adequacy + facilities potential criteria

### long range facilities plan - recommendations

- Use a strategic approach that fully renovates/replaces schools to reduce the deferred maintenance backlog. **Use the bulk of the money from each capital phase to modernize schools.**
- **Allocate some money to fix the worst facility needs.** This needs to occur in each phase. These funds would focus on fixing the building shell first to minimize further building deterioration.
- Endeavor to significantly rebuild/fully renovate the portfolio over a 24- to 40-year time frame.
- Priority should be given to **capital projects that reduce future operational costs** in order to make more operational funds available for the classroom.
- Screen all future capital projects through the guiding principles.
- Invest prudently in schools identified for future replacement.

# educational adequacy + facilities the (iterative) process

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