



School Improvement Bond Update

Bond Accountability Committee

Meeting

March 6, 2024



Agenda

- **Welcome & Introductions** 5:30 – 5:40 pm
- **Public Comment** 5:40 – 5:45 pm
- **Program Administration Updates** 5:45 – 6:00 pm
- **2020 Technology Project Updates** 6:00 – 6:15 pm
- **Modernization Project Updates** 6:15 – 7:00 pm
- **Equity Presentation** 7:00 – 7:15 pm
- **Bond Planning Update** 7:15 – 7:30 pm
- **Adjourn** 7:30 pm



Public Comment

*(public comments received via email prior
to the meeting will be read aloud)*



Business Equity Utilization Data Constraints

Business equity utilization data from the B2GNow software system represents a point in time and may not fully represent actual payments received by Certified Businesses. The accuracy of the utilization data is contingent on several factors:

- PPS's payment data from PeopleSoft is uploaded into B2GNow monthly and reflects all payments from PPS to prime contractors during the prior month.
- Accurate data on payments to subcontractors is contingent on prime contractors or upper tier subs entering their subcontractors in B2GNow and subsequently self-reporting their monthly payments to each subcontractor in a timely and accurate manner.
- If prime contractors (or first tier subs) enter payments to first tier or subsequent tier subs in a timely manner, the total equity utilization calculation can be expected to accurately reflect contract expenditures as of approximately one to two months prior to the report date.
- If prime contractors (or first tier subs) do not enter payments to first tier or subsequent tier subs in a timely manner, accurate equity utilization data will be delayed, at times significantly. Even closed contracts may be updated later if PPS learns of new subcontractor payments that were made months or even years prior.
- **MARCH 2024 NOTIFICATION:** Due to a January 2024 communications issue between PeopleSoft and Cobblestone, January data in B2G does not accurately reflect payment and/or encumbrance data. PPS is working on resolving this issue. All equity numbers are from data prior to 12/31/2023.



Program Administration Updates



SCHOOL BUILDING IMPROVEMENT BOND

Bond Program Administration



Office of School Modernization - Program

March 2024

STATUS AT A GLANCE

Legend:

	As planned: no concerns
	Caution: requires attention
	Impacts: impacts occurring

	As Planned	Caution	Impacts
Budget	X		
Equity		X	
Overall	X		

EQUITY

BUSINESS EQUITY

WORKFORCE EQUITY

		MBE	WBE	SDVBE	ESB	N-C	TOTAL	goal	MIN	goal	FEM	goal	APPR	req
Cumulative	Current	5.23%	9.32%	0.05%	2.60%	1.20%	18.41%	18%	31%	25%	5%	14%	23%	20%
	Prior Report	4.58%	8.49%	0.05%	2.45%	0.79%	16.36%		30%		5%		23%	
12 Month	Current	7.10%	11.73%	0.00%	1.53%	2.31%	22.67%	18%	DATA IS FROM 1/1/2024 DUE TO A COMMUNICATIONS FAILURE BETWEEN PEOPLESOFT & COBBLESTONE.					
	Prior Report	4.26%	11.80%	0.00%	1.77%	1.10%	18.93%							

Percent of payments made to Certified owned businesses, cumulative and 12-month rolling; Percent of labor hours of apprenticeable trades, cumulative

BUDGET

2012 PROGRAM	BUDGET		FUNDING		PROGRESS		FORECAST	
	Original Budget	Current Budget	Bond Funds	Other Funds	Actuals To Date	Additional Encumbered	Estimate At Completion	Over/Under
Franklin HS Mod	81,585,655	112,932,069	110,950,414	1,981,656	112,932,069	-	112,932,069	-
Grant HS Mod	88,336,829	158,531,760	155,310,987	3,220,774	158,531,760	-	158,531,760	-
Roosevelt HS Mod	68,418,695	101,631,108	97,127,989	4,503,119	101,631,108	-	101,631,108	-
Faubion Replace	27,035,537	50,115,627	34,109,383	16,006,244	50,028,171	-	50,115,627	-
Grant Upper Field	-	3,246,600	3,246,600	-	3,170,988	-	3,170,988	(75,612)
RHS Phase IV	-	6,157,969	6,153,741	4,228	6,157,969	-	6,157,969	-
Other Projects	123,441,923	118,273,603	113,293,283	4,980,319	118,273,603	-	118,273,603	-
							2012 Project Subtotals	(75,612)
Administration	68,117,563	27,438,746	27,235,264	203,482	27,438,746	-	27,438,746	-
Contingency	25,063,798	404,588	404,588	-	-	-	-	(404,588)
							2012 Program Subtotals	(404,588)
Totals	482,000,000	578,732,070	547,832,248	30,899,822	578,164,414	-	578,251,870	(480,200)

2012 Budget Notes

99% Spent

- Staff are working through closing out all non-active 2012 commitments and projects, and returning unspent funds to the Program.
- Any remaining 2012 funding will go towards prior add-on project requests at 2012 modernizations.
- Remaining program contingency is being shown for transparency but, as noted above, will go to prior add-on project requests once all other funding sources and expenditures have been reconciled.



Office of School Modernization - Program

March 2024

2017 PROGRAM	BUDGET		FUNDING		PROGRESS		FORECAST	
	Original Budget	Current Budget	Bond Funds	Other Funds	Actuals To Date	Additional Encumbered	Estimate At Completion	Over/Under
Benson HS Mod	202,000,000	155,484,185	141,550,081	13,934,104	111,377,434	57,237,060	156,828,877	1,344,692
Benson Swings	-	13,550,089	13,544,288	5,801	12,205,396	-	12,205,396	(1,344,692)
Lincoln HS Repl	187,000,000	242,619,558	242,500,000	119,558	223,663,180	7,066,754	224,190,495	(18,429,063)
Kellogg MS Replace	45,000,000	57,941,414	57,697,500	243,914	57,892,035	29,121	57,921,156	(20,258)
McDaniel Mod	146,000,000	200,717,847	197,000,000	3,717,847	200,341,175	223,552	200,480,762	(237,085)
Health & Safety	-	152,959,971	123,657,766	29,302,206	145,166,367	869,282	152,959,971	-
Athletics	-	2,147,865	2,147,865	-	875,238	1,125,735	2,147,865	-
							2017 Project Subtotals	(18,686,406)
Administration	40,000,000	59,960,955	58,198,551	1,762,403	49,447,482	4,759,840	57,505,530	(2,455,424)
Contingency	20,000,000	21,014,777	21,014,777	-	-	-	14,400,000	(6,614,777)
Unallocated H&S	150,000,000	24,725,825	24,725,825	-	-	-	24,725,825	-
Unalloc Athletics	-	352,135	352,135	-	-	-	352,135	-
							2017 Program Subtotals	(9,070,201)
Totals	790,000,000	931,474,621	882,388,788	49,085,833	800,968,307	71,311,344	903,718,013	(27,756,607)

2017 Budget Notes

86% spent

- Benson HS Modernization funding is split between 2017 and 2020. The 2017 Benson HS Modernization information shown above reflects 2017 funding and budget only, with actuals and additional encumbered specific to the 2017 funding as well. The Benson Swings shares total budget/funding with Benson HS Modernization, so the "under" amount of budget in the Benson Swings project will be applied to the Benson HS Modernization and is therefore shown as an "over" amount in the Benson HS Modernization line.
- The Lincoln Modernization project is forecasting roughly \$18.4M under budget after Substantial Completion of Phase 2. These funds will ultimately be returned to 2017 Program contingency.
- FY23 interest earnings in the amount of \$5,448,253.04 have been added to the 2017 Program Contingency
- There is ongoing discussion with the Board of Education (BOE) regarding use of remaining 2017 Program contingency funds. \$10M in bond funds were committed as a match to Portland Clean Energy Fund (PCEF) funds as part of Portland Association of Teachers (PAT) contract negotiations. The Board previously requested that 2017 Program Contingency funds be used to address emergency athletic facility needs at Grant Bowl (field and track) and Buckman (track). The funds are being tracked separately above, as Athletics (projects) and Unalloc Athletics (funds not yet allocated to projects) for transparency. The Board has also expressed interest in utilizing contingency funds for other athletics-related projects, but no resolutions have yet been passed.
- As the 2017 Health & Safety projects wind down, OSM is also reviewing to ensure that any Health & Safety funds not needed to complete certain categories of H&S scope get reallocated to other H&S categories, to ensure that the full \$150M dedicated to Health & Safety projects by the 2017 Bond measure is utilized as such. Current pressing needs include ongoing roof replacements, as well as replacement of fire alarm panels.



SCHOOL BUILDING IMPROVEMENT BOND

Bond Program Administration



Office of School Modernization - Program

March 2024

2020 PROGRAM	BUDGET		FUNDING		PROGRESS		FORECAST	
	Original Budget	Current Budget	Bond Funds	Other Funds	Actuals To Date	Additional Encumbered	Estimate At Completion	Over/Under
Benson 2020 funds	-	164,903,890	164,903,890	-	139,051,010	25,852,879	164,903,890	-
Jefferson HS Mod	311,000,000	366,007,500	366,000,000	7,500	9,796,863	21,007,531	366,007,500	-
CBSE	60,000,000	60,000,000	60,000,000	-	-	-	60,000,000	-
Cleveland HS Design	20,000,000	20,000,000	20,000,000	-	518,918	1,206,764	20,000,000	-
Wells HS Design	20,000,000	20,000,000	20,000,000	-	195,011	1,004,587	20,000,000	-
Roosevelt PhV Design	2,000,000	2,000,000	2,000,000	-	-	-	2,000,000	-
MPG Building	64,000,000	80,476,726	80,447,075	29,651	53,803,330	23,095,165	80,476,726	-
Curriculum	53,444,000	53,444,000	53,444,000	-	43,558,831	6,129,325	53,444,000	-
Technology	128,200,000	143,503,600	128,200,000	15,303,600	79,610,135	8,306,995	144,263,144	759,544
Infra Projects	-	222,900,317	217,842,451	5,057,866	115,052,545	74,457,595	222,900,317	-
2020 Project Subtotals								759,544
Administration	63,098,640	63,124,758	63,098,640	26,118	13,866,690	4,119,133	63,124,758	-
2017 Bond Balance	152,000,000	-	-	-	-	-	-	-
Contingency - OSM	93,257,360	59,662,689	59,662,689	-	-	-	59,662,689	-
Unalloc Proj Funds	241,000,000	52,974,842	52,974,842	-	-	-	52,974,842	-
2020 Project Subtotals								-
Totals	1,208,000,000	1,308,998,322	1,288,573,588	20,424,735	455,453,334	165,179,974	1,309,757,866	759,544

2020 Budget Notes

35% spent

- The Benson HS modernization team has worked diligently to remain in budget, despite early unanticipated costs (detailed in previous reports), however OSM was recently notified by general contractor Andersen Construction that they are behind schedule and anticipate the need for overtime to open Benson on time. This is a potential significant financial risk and OSM is reviewing this issue with the contractor.
- FY23 interest earnings in the amount of \$6,844,525.39 have been added to the 2020 Program Contingency
- Due to current economic conditions, construction costs and design estimates continue to be significantly elevated from previous budget numbers. OSM anticipates utilizing 2020 Bond Program contingency to ensure planned district-wide scopes in ADA, SPED, and mechanical are completed equitably across the District. Current forecasts anticipate another \$31M will be needed for mechanical (controls upgrades), \$9M for ADA, and \$6M for SPED.
- Estimate at Completion for Jefferson HS Modernization will be updated when the updated cost estimate for the revised conceptual plan is presented to the Board in early April.
- Encumbrances shown for Cleveland HS and Ida B Wells HS modernization planning and design projects are initial commitments for the planning phase of the work. Design teams are not able to provide cost proposals for design phase work until after comprehensive plans have been developed and approved by the Board of Education.
- As the District's CBSE team continues to review potential options for CBSE-related construction, no CBSE funds have been spent. Bond funds may only be spent on capitalizable assets; once such assets have been further defined, funds will be able to be used for planning, design and construction.
- Curriculum reporting in the Bond Programs Report shows Bond funds only. Non-bond funds related to planned bond scope were tracked in eBuilder for a short period of time only. For a full report of non-Bond funds used for planned bond scope, please see the Curriculum Project Status reports.



Office of School Modernization - Program

March 2024

OVERALL BOND PROGRAM	BUDGET		FUNDING		PROGRESS		FORECAST	
	Original Budget	Current Budget	Bond Funds	Other Funds	Actuals To Date	Additional Encumbered	Estimate At Completion	Over/Under
Totals	2,480,000,000	2,819,205,013	2,718,794,623	100,410,390	1,834,586,055	236,491,318	2,791,727,749	(27,477,264)

PROGRAM NOTES

Approved Usage of Bond Funds

- OSM continues to work closely with PPS Finance to ensure individual bond expenditures meet bond compensability requirements. A Bond Compensability Committee meets regularly to review compensability questions.
- All bond-funded projects are reported to the Bond Accountability Committee. Criteria for selection of projects to be funded by the 2017 Health & Safety allocation have been previously presented to the Board and are available on OSM's webpages. Criteria for long-term selection of projects to be funded by 2020 Infrastructure allocations were shared with the Facilities & Operations Committee in October 2022.

Bond Budget

- Please see budget notes above for more detailed information by bond measure.

Bond Scope

- No active projects remain in the 2012 Bond. Remaining funds and expenditures need to be fully reconciled to know final remaining funds in program and whether additional projects can be completed. The lengthy process of reconciliation is in progress.
- In the 2017 Bond, staff are working through returning unused funds from prior Health & Safety projects to the unallocated funding buckets for Health & Safety, to determine next steps for funding additional projects. Substantial unneeded funds being returned from the water quality and lead paint programs will likely be allocated to roof replacement projects, due to the great need for ongoing roof replacements. Additional needs include replacements of fire alarm panels at multiple sites; this work was overlooked in previous scopes because these panels were at sites that did not need additional fire alarm upgrades.
- In the 2020 Bond, please see notes above under 2020 Budget Notes regarding additional budget needs for Infrastructure projects in the mechanical, ADA, and SPED categories, in order for those projects to complete anticipated scope.

Bond Schedule

- MPG, while addressing tight timing due to unforeseen conditions in construction, is on schedule. Benson project team is reviewing schedule delays with the general contractor. Jefferson, due to the Board-mandated design change, is developing a new schedule.
- Comprehensive planning and design for Cleveland HS and Ida B Wells HS modernizations are proceeding with minor delays from the originally anticipated schedule for planning and design. Construction schedules will depend on approved master plan, as well as future funding.
- 2020 Infrastructure and Capacity projects continue to move forward as quickly as possible. The extent of work that OSM is placing as part of the 2020 Bond puts significant pressure on both the local contracting market and the use of schools. Staff work carefully to balance market constraints, District needs, and bond spending requirements when determining project schedules.



2020 Technology Project Updates



SCHOOL BUILDING IMPROVEMENT BOND

Technology



2020 Bond - Technology

March 2024

PPS Team Leads: Don Wolff, Derrick Brown

STATUS AT A GLANCE

Legend:

	As planned: no concerns
	Caution: requires attention
	Impacts: impacts occurring

	As Planned	Caution	Impacts
Scope		X	
Budget		X	
Schedule			X
Overall			X

BUDGET

	BUDGET		FUNDING		PROGRESS		FORECAST	
	Original Budget	Current Budget	Bond Funds	Other Funds	Actuals to Date	Additional Encumbered	Estimate At Completion	Over/Under
Tech Program Admin - 5519	23,264,652	17,382,694	16,118,294	1,264,400	2,806,591	2,461,277	9,749,937	(7,632,758)
Classroom Modernization - 5516	24,780,325	23,793,677	23,743,677	50,000	13,864,637	1,620,630	34,662,120	10,868,443
Device Replacement - 5515	31,006,443	48,022,761	38,683,834	9,338,927	37,278,451	1,433,800	43,693,696	(4,329,065)
ERP Replacement Planning - 5518	11,107,080	14,961,427	10,756,427	4,205,000	3,204,282	1,114,220	19,109,590	4,148,162
Infrastructure & Security - 5517	38,041,500	38,486,773	38,041,500	445,273	22,189,951	1,087,024	36,191,535	(2,295,239)
Harrison Park MS Conv - 5706	-	856,267	856,267	-	266,223	590,044	856,267	-
Totals	128,200,000	143,503,600	128,200,000	15,303,600	79,610,135	8,306,995	144,263,144	759,544

SCHEDULE

	2024				2025				2026				2027			
	Q1	Q2	Q3	Q4	Q1	Q2	Q3	Q4	Q1	Q2	Q3	Q4	Q1	Q2	Q3	Q4
Tech Program Admin - 5519	★															
Classroom Modernization - 5516																
Analysis/Planning	★															
Procurement	★															
Placement	★															
Device Replacement - 5515	★															
ERP Replacement Planning - 5518	★															
Infrastructure & Security - 5517																
Analysis/Planning	★															
Procurement	★															
Placement	★															

Baseline

Analysis/Planning

Procurement

Distribution

Placement



<https://www.pps.net/2020Bond-Tech>



Modernization Project Updates



Definitions

STATUS DEFINITIONS

	As Planned	Caution	Impacts
Budget	Pre-50% const: > 10% Project Contingency	Pre-50% const: 0% - 10% Project Contingency	Pre-50% const: < 0% Project Contingency
	Post-50% const: > 5% Project Contingency	Post-50% const: 0% - 5% Project Contingency	Post-50% const: < 0% Project Contingency
Equity	certified business participation > 18% and workforce equity > 20%	certified business participation 10% - 18% or workforce equity 10% - 20%	certified business participation < 10% or workforce equity < 10%
Schedule	0 or less weeks delay to SC	0+ up to 4 weeks delay to SC	greater than 4 weeks delay to SC
Overall	budget, equity and schedule are all green	at least one category is yellow	at least one category is red

EQUITY CATEGORIES

MBE = Minority-owned Business Enterprise

WBE = Woman-owned Business Enterprise

SDVBE = Service Disabled Veteran-owned Business Enterprise

ESB = Emerging Small Business

N-C = Non-Certified, counted for credit from a Certified Business that "graduated" out or did not reapply for certification



Lincoln HS Replacement



Lincoln HS Modernization
March 2024

FINAL REPORT

PPS Team Lead: Erik Gerding
Design: Bora Architects
Construction: Hoffman Pacificmark

STATUS AT A GLANCE

Legend:

	As planned: no concerns
	Caution: requires attention
	Impacts: impacts occurring

	As Planned	Caution	Impacts
Budget	X		
Equity	X		
Schedule	X		
Overall	X		

BUDGET

BUDGET		FUNDING		PROGRESS		FORECAST		CONTINGENCY IN CONTEXT	
Original Budget	Current Budget	Bond Funds	Other Funds	Actuals to Date	Additional Encumbered	Estimate At Completion	Over/Under	Work Complete / %	Contingency Remain / %
242,500,000	242,619,558	242,500,000	119,558	223,663,180	7,066,754	224,190,495	(18,429,063)	100%	5.04%

EQUITY

Percent of payments made to Certified owned businesses, percent of labor hours of apprenticeable trades; cumulative

	MBE	WBE	SDVBE	ESB	N-C	TOTAL	goal	MIN	goal	FEM	goal	APPR	req
Consultants	1.15%	6.71%	0.00%	2.71%	0.00%	10.57%	18%						
Contractors	2.37%	14.78%	0.00%	1.01%	2.52%	20.69%	18%						
Overall	2.28%	14.18%	0.00%	1.13%	2.34%	19.93%	18%						
Workforce								36%	25%	3%	14%	20%	20%

SCHEDULE

NEXT MILESTONE: Contract Closeout

On Track?

Yes

PROJECT PHASE	2021				2022				2023				2024			
Planning																
Design																
Construction																
School Opening(s)																

Baseline	Planning	Design	Construction	School Opening
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SCHOOL BUILDING IMPROVEMENT BOND

Benson HS Modernization and Multiple Pathways to Graduation (MPG)



Benson HS / Benson Swing Sites / MPG

March 2024

PPS Team Lead: Armand Milazzo
Design: Bassetti Architects
Construction: Andersen Construction Co.

STATUS AT A GLANCE

Legend:

	As planned: no concerns
	Caution: requires attention
	Impacts: impacts occurring

	As Planned	Caution	Impacts
Budget		X	
Equity		X	
Schedule		X	
Overall		X	

BUDGET

	BUDGET		FUNDING		PROGRESS		FORECAST		CONTINGENCY	
	Original Budget	Current Budget	Bond Funds	Other Funds	Actuals To Date	Additional Encumbered	Estimate At Completion	Over/Under	Work Compl	Cont Remain
Benson HS	202,000,000	320,388,075	306,453,971	13,934,104	250,428,444	61,094,337	321,732,767	1,344,692	80%	0%
Swing Sites	-	13,550,089	13,544,288	5,801	12,205,396	-	12,205,396	(1,344,692)	100%	0%
MPG Building	-	80,476,726	80,447,075	29,651	53,803,330	23,095,165	80,476,726	-	80%	3%
Benson Totals	202,000,000	414,414,890	400,445,334	13,969,556	316,437,171	84,189,502	414,414,890	-		

EQUITY

Percent of payments made to Certified owned businesses, percent of labor hours of apprenticeable trades; cumulative

	MBE	WBE	SDVBE	ESB	N-C	TOTAL	goal	MIN	goal	FEM	goal	APPR	req
Consultants	4.92%	7.97%	0.00%	1.37%	0.00%	14.26%	18%						
Contractors	6.28%	6.26%	0.00%	2.17%	1.57%	16.28%	18%						
Overall	6.13%	6.44%	0.00%	2.08%	1.40%	16.06%	18%						
Workforce								36%	25%	9%	14%	23%	20%

SCHEDULE

NEXT MILESTONE: Substantial Completion

On Track? No

PROJECT	2021			2022			2023			2024		
Benson HS Modernization												
Benson Swing Sites												
MPG Building												

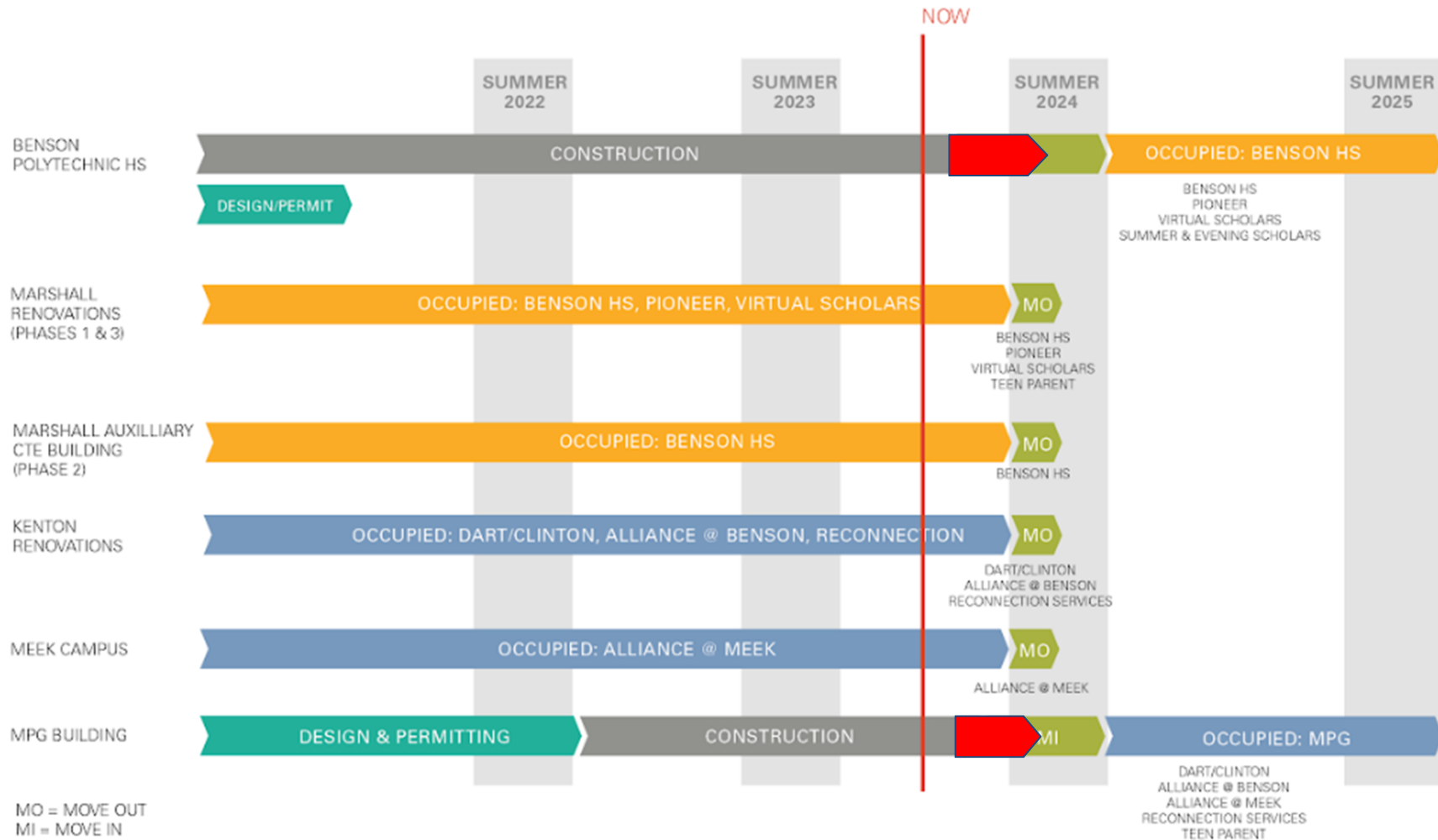
Baseline Planning Design Construction School Opening



BPHS & MPG Modernizations



BENSON & MPG SITES





Benson Tech HS Modernization



Benson Polytechnic – All buildings are under construction



March 2024

18



Benson Tech student site visit checking out their new Commons, Cafeteria, and the adjacent Social Courtyard





New Commons with Learning Stair & Kitchen/Cafeteria Servery in Building F



March 2024



Building E: Final finish Installation in the Historic Administration building





SCHOOL BUILDING IMPROVEMENT BOND

Benson Tech HS Modernization



Construction Progress: Auto Courtyard, Restrooms, Central Plant



March 2024

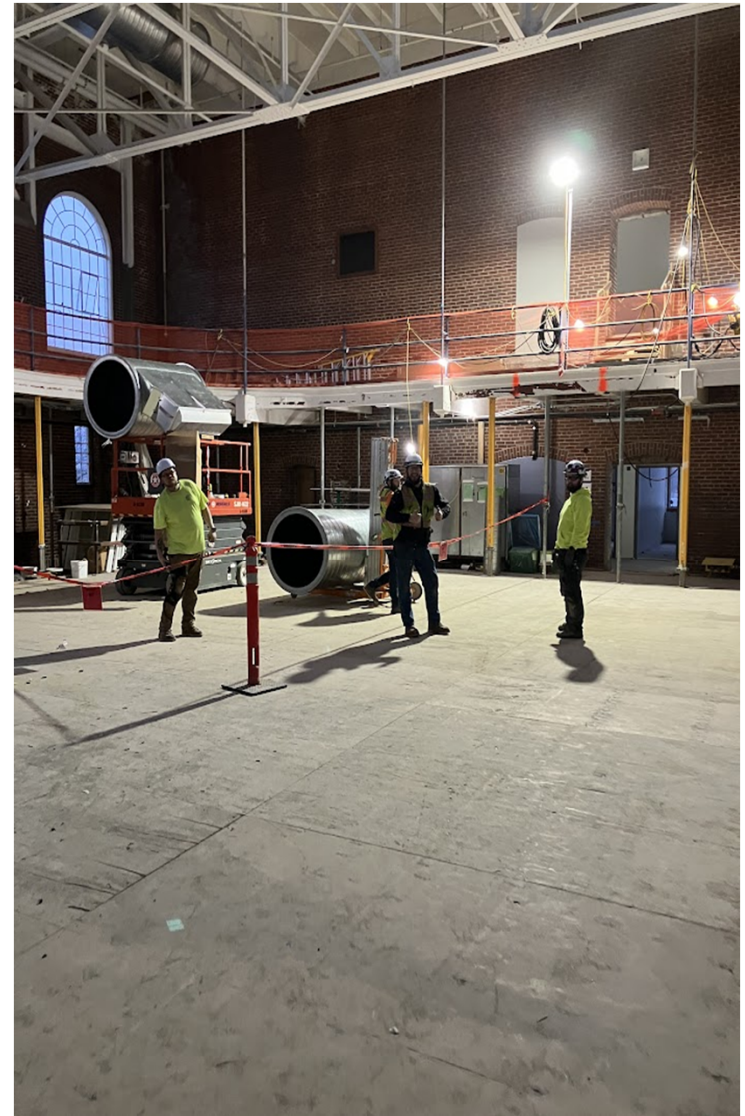
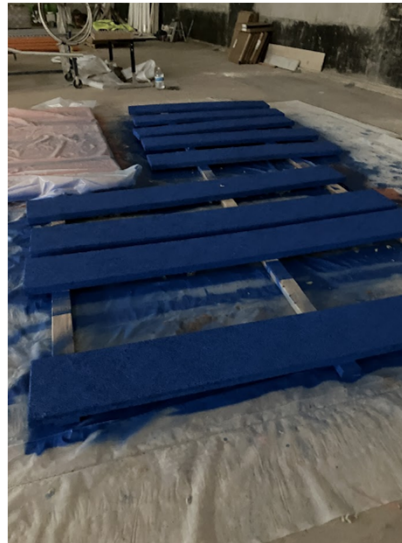


SCHOOL BUILDING IMPROVEMENT BOND

Benson Tech HS Modernization



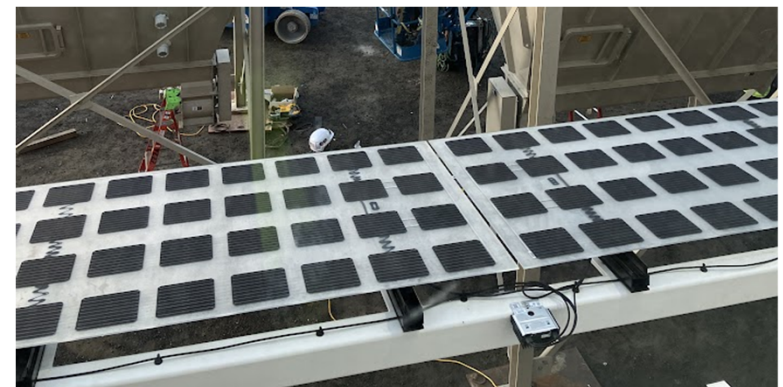
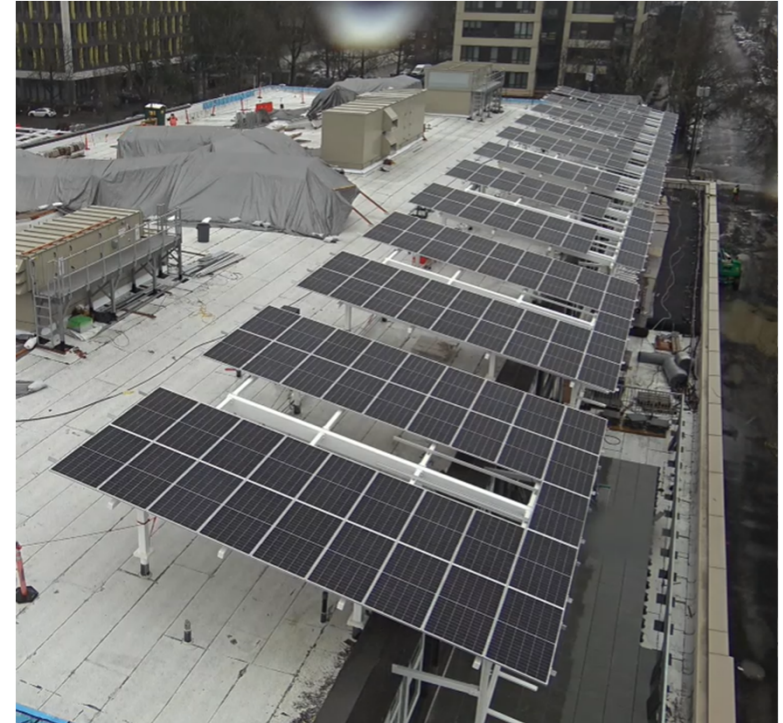
Interior: Historic G1 Gym & Running Track Mechanical Duct & G2 Sound Panel preparation



March 2024



Exterior: Solar Panel Installation



March 2024



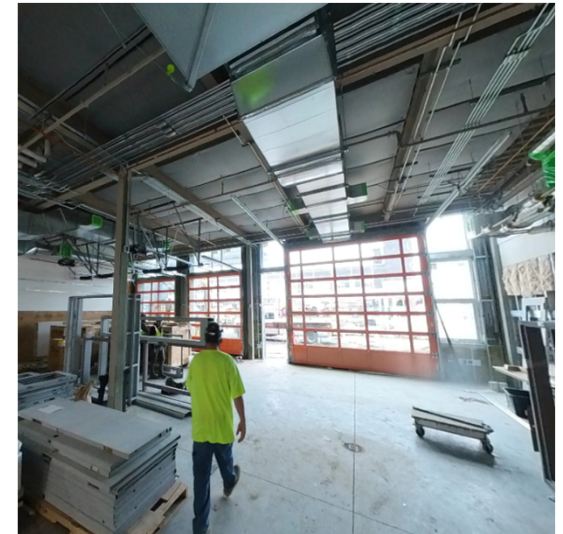
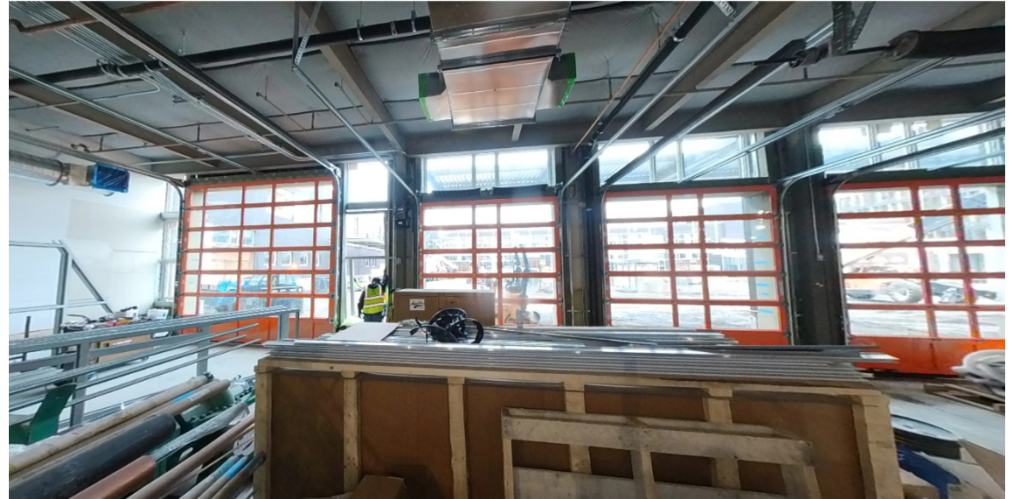
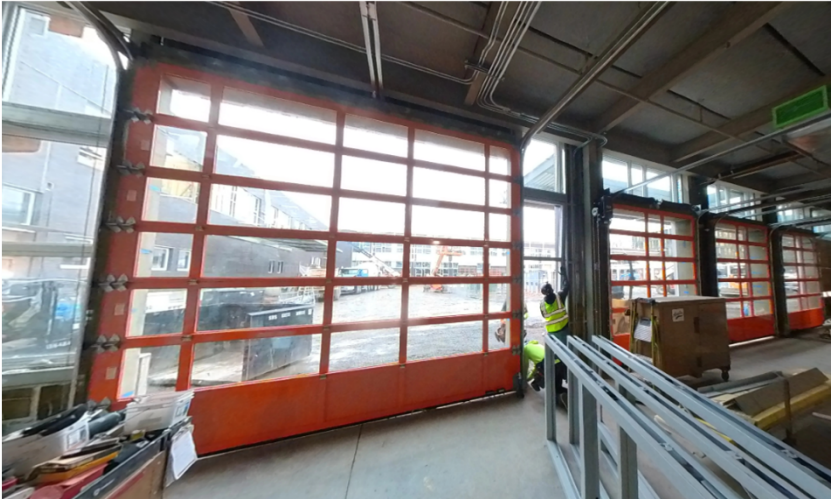
Exterior: Radio Tower & Dust Collector



March 2024



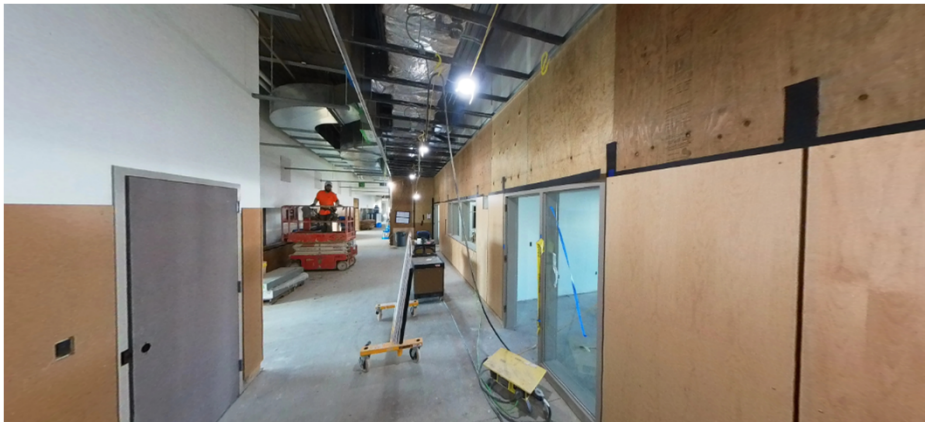
Interior: Building H Auto Shop



March 2024



Interior Finishes: Mockup Classroom, Science Lab, CTE Hallway





Interior Finishes: Historic Auditorium, Historic Administration Building



March 2024



Buckman Field Connection: new concrete stair & ramp installed



March 2024



Multiple Pathways to Graduation Building



Exterior Progress: West Elevation





Exterior Progress: North Elevation

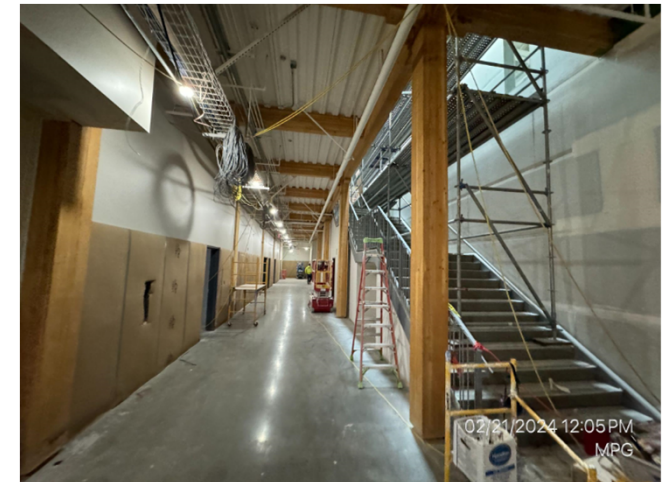




Multiple Pathways to Graduation Building



Work Progress: Gym (tower crane removed), Hallways, stair





Multiple Pathways to Graduation Building



Interior Finishes: Classroom, Science Room, Hallway





SCHOOL BUILDING IMPROVEMENT BOND

Jefferson HS Modernization



Jefferson HS Modernization

March 2024

PPS Team Leads: Steve Effros, Kiesha Locklear, Ayana Horn
 Design: BORA Architects, Lever Architecture
 Construction: Andersen Construction, with Crossover Construction, Faison Construction, Northwest Infrastructure, Professional Lath & Plaster, Professional Minority Group

STATUS AT A GLANCE

Legend:

	As planned: no concerns
	Caution: requires attention
	Impacts: impacts occurring

	As Planned	Caution	Impacts
Budget			X
Equity*		X	
Schedule			X
Overall			X

BUDGET

BUDGET		FUNDING		PROGRESS		FORECAST		CONTINGENCY IN CONTEXT	
Original Budget	Current Budget	Bond Funds	Other Funds	Actuals to Date	Additional Encumbered	Estimate At Completion	Over/Under	Work Complete / %	Contingency Remain / %
311,000,000	366,007,500	366,000,000	7,500	9,796,863	21,007,531	366,007,500	-	0%	15.00%

EQUITY

Percent of payments made to Certified owned businesses, percent of labor hours of apprenticeable trades; cumulative

	MBE	WBE	SDVBE	ESB	N-C	TOTAL	goal	MIN	goal	FEM	goal	APPR	req
Consultants	4.50%	5.63%	0.00%	0.00%	1.87%	12.01%	18%						
Contractors*	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	18%						
Overall	4.13%	5.16%	0.00%	0.00%	1.72%	11.01%	18%						
Workforce*								0%	25%	0%	14%	0%	20%

* Construction trade payments have not yet been made.

SCHEDULE

NEXT MILESTONE: 100% SD

On Track? No

PROJECT PHASE	2024				2025				2026				2027			
Planning	★															
Design																
Construction																
School Opening(s)																

Baseline Planning Design Construction School Opening



DECEMBER 2023

On Tuesday, December 12, 2023, the PPS Board of Education passed RESOLUTION No. 6806 that directed the Superintendent and the Office of School Modernization to reassess the current Jefferson High School site plan, building design and related land-use efforts so that Jefferson High School students and staff would not relocate to another temporary site during construction of the modernized school.

This meant Jefferson students would remain at Jeff for the 2024-25 school year and beyond until the new building is completed. In addition, the Jefferson Modernization design team was directed to return to the Board of Education in 120 days with an updated plan to modernize Jefferson High School.

Per the resolution, the plan will:

- Keep students & staff largely on the Jefferson campus during construction.
- Include a targeted student enrollment of 1,700.
- Demolish the 1909 building and build a new building.
- Seek to conform to PPS's current high school education specifications area program.

The plan will also strive to deliver the project within the currently available bond (and other available) funding and will identify anticipated budget overage.

The plan will not include colocation of the Center for Black Student Excellence, Harriet Tubman Middle School, or other unaffiliated to Jefferson High School programs.

These decisions were made by the Board of Education in response to feedback from the community. Community members strongly preferred keeping students on site during construction and building a new Jefferson instead of retaining the 1909 building.



JANUARY/FEBRUARY 2024

Three potential pathways for demolition of the 1909 Building:

- Request to de-list the property from the Piedmont Conservation District
- Request to de-list the 1909 Building as a contributing historic resource
- Request a demolition permit specifically for the 1909 Building

Meetings with the City of Portland:

- Early Assistance conference with City staff in January
- Design Advice Request (DAR) with Historic Landmarks Commission in February

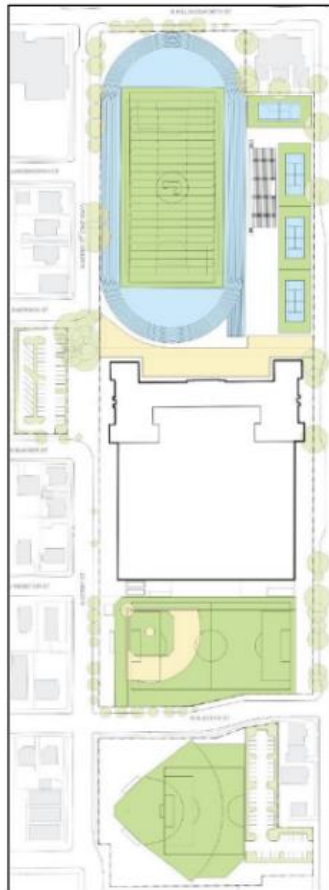
Other project team work:

- Documenting and understanding site conditions and City requirements for placement of building at north end of campus
- Reviewing potential costs and schedule implications of different site layouts with building at north end of campus
- Developing a Rough Order Magnitude (ROM) cost and schedule for a revised conceptual plan meeting requirements of Board Resolution 6806

Next Steps:

Facilities and Operations Committee draft presentation: March 20, 2024

Board of Education presentation: April 2, 2024



Old Design



New Design

Old Design vs. New Design

Major Implications

- NO SWING: Students & Staff On Site
- New Building on Killingsworth
- Relocated Track & Field
- Potential use of South Fields During Construction
- Larger Baseball Field



Ida B Wells HS Modernization Planning & Design



Ida B Wells HS Modernization Planning & Design
March 2024

PPS Team Lead: Donna Bezio
Design: Bora Architecture
Construction: n/a

STATUS AT A GLANCE

Legend:

	As planned: no concerns
	Caution: requires attention
	Impacts: impacts occurring

	As Planned	Caution	Impacts
Budget	X		
Equity*			
Schedule	X		
Overall	X		

BUDGET

BUDGET		FUNDING		PROGRESS		FORECAST		CONTINGENCY IN CONTEXT	
Original Budget	Current Budget	Bond Funds	Other Funds	Actuals to Date	Additional Encumbered	Estimate At Completion	Over/Under	Work Complete / %	Contingency Remain / %
20,000,000	20,000,000	20,000,000	-	195,011	1,004,587	20,000,000	-	0%	5.18%

EQUITY

Percent of payments made to Certified owned businesses, percent of labor hours of apprenticeable trades; cumulative

	MBE	WBE	SDVBE	ESB	N-C	TOTAL	goal	MIN	goal	FEM	goal	APPR	req
Consultants	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	18%						
Contractors*	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	18%						
Overall	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	18%						
Workforce*								0%	25%	0%	14%	0%	20%

* No construction in this design/planning project.

SCHEDULE

NEXT MILESTONE:

Master Plan Approval

On Track?

Yes

PROJECT PHASE	2024				2025				2026				2027			
Planning																
Design																
Construction																
School Opening(s)																

Baseline

Planning

Design

Construction

School Opening



Community Engagement Summary

Various community outreach events have provided valuable input to help develop the Comprehensive Plan. Two schemes are being presented today. The Board of Education will review/approve the final plan on April 2, 2024.

Comprehensive Planning Committee (CPC) Meetings:

- 5 CPC meetings so far

Teachers and Staff:

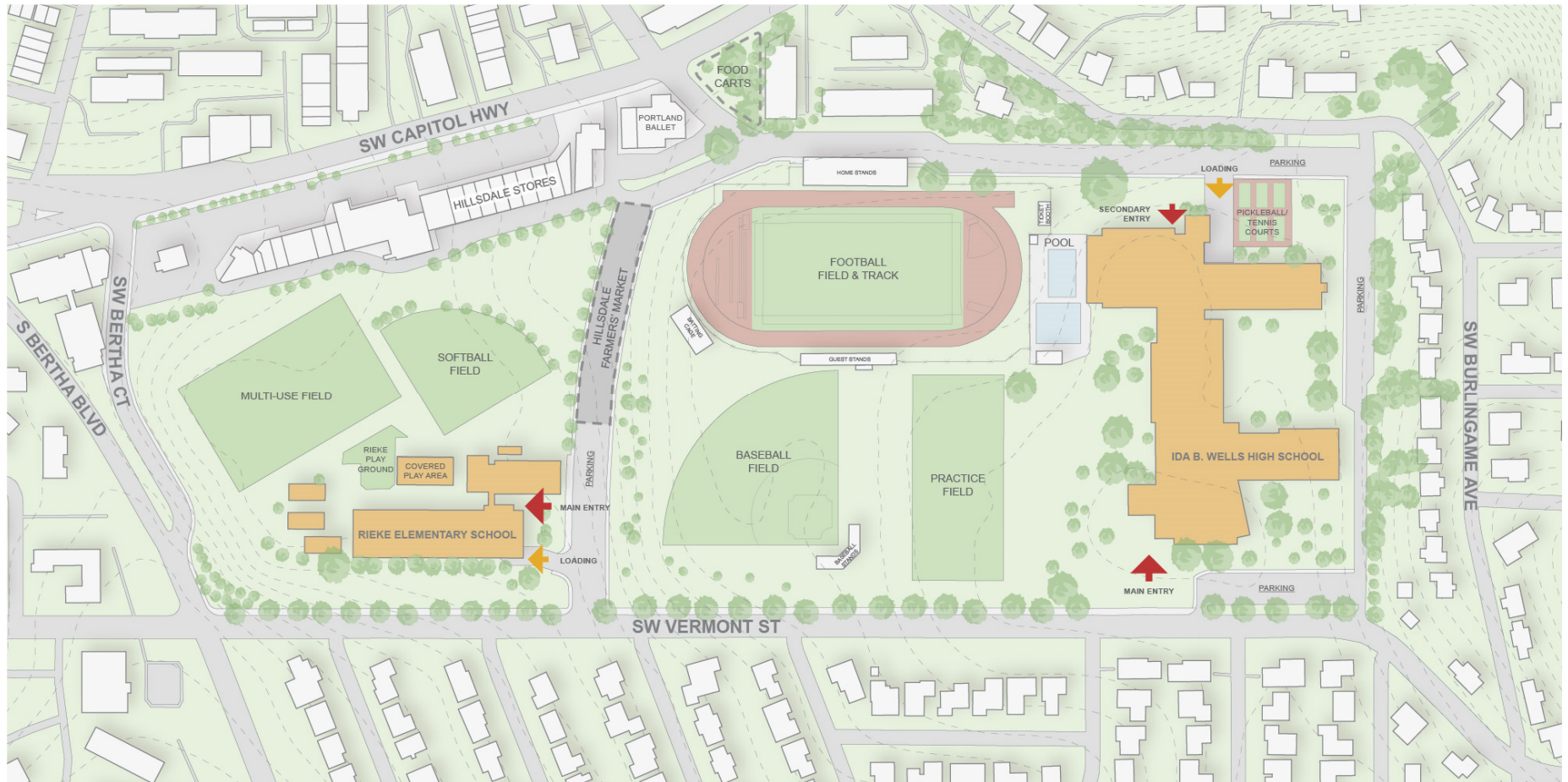
- Presentation at IBW Staff Meeting

General Community & Affinity Groups:

- 3 Public Design Workshops
- Stakeholder Interviews and Engagement Sessions with various groups including student leaders, community based organizations, special education staff, Muslim and Arab students, immigrant and refugee community members, and additional affinity groups
- Open House being scheduled to share out final design in April



Existing Site Plan

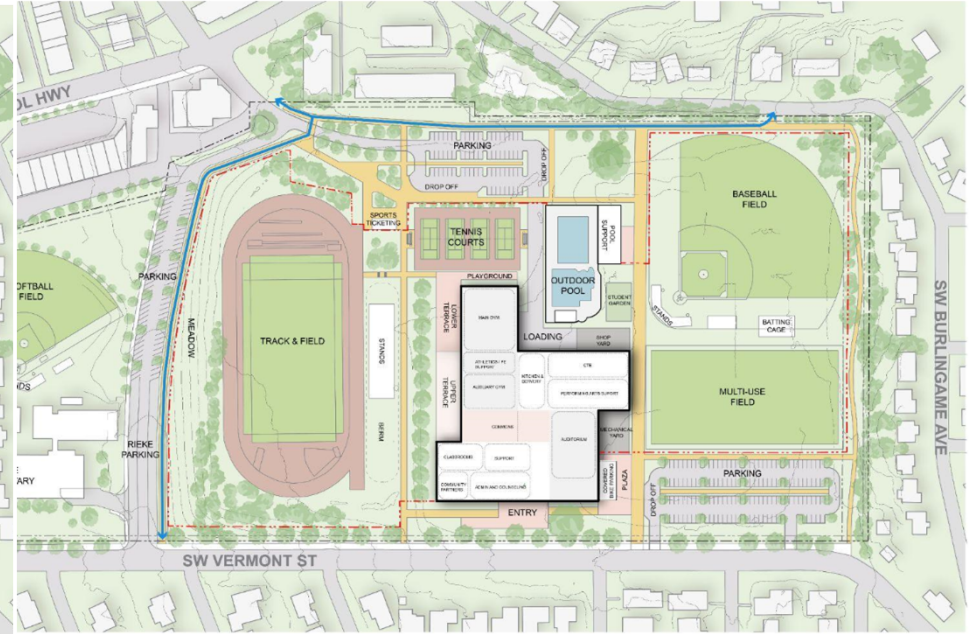
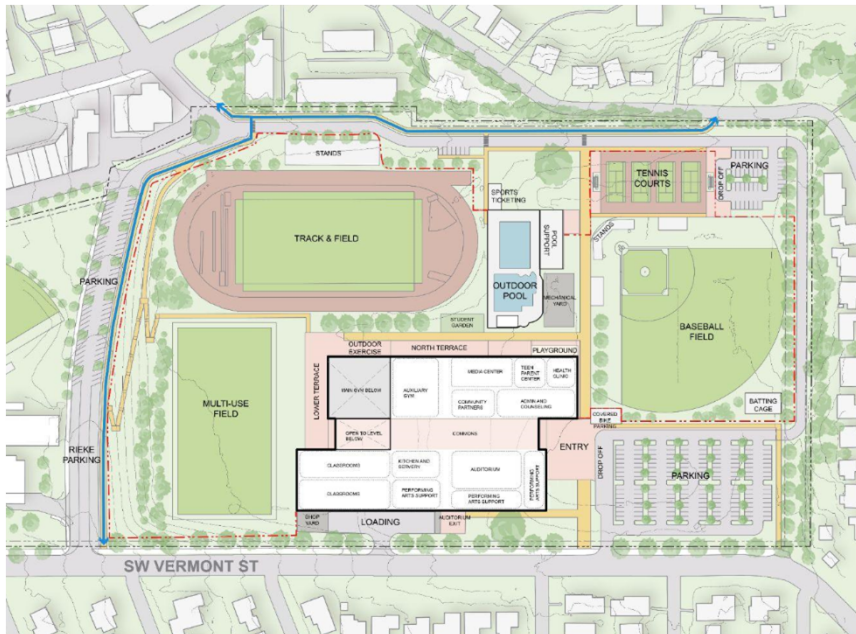




Summary of Schemes 1 and 2

Both Schemes Provide:

- City pool in existing location
- A welcoming building that meets the PPS Education Specifications for High Schools
- A central commons connected to outdoor spaces and views to the west
- North/South pathways to connect campus arrival points
- New tennis courts, new baseball field, new multi-purpose field, improved softball field
- Approximately the same total number of parking spaces in each scheme, locations vary

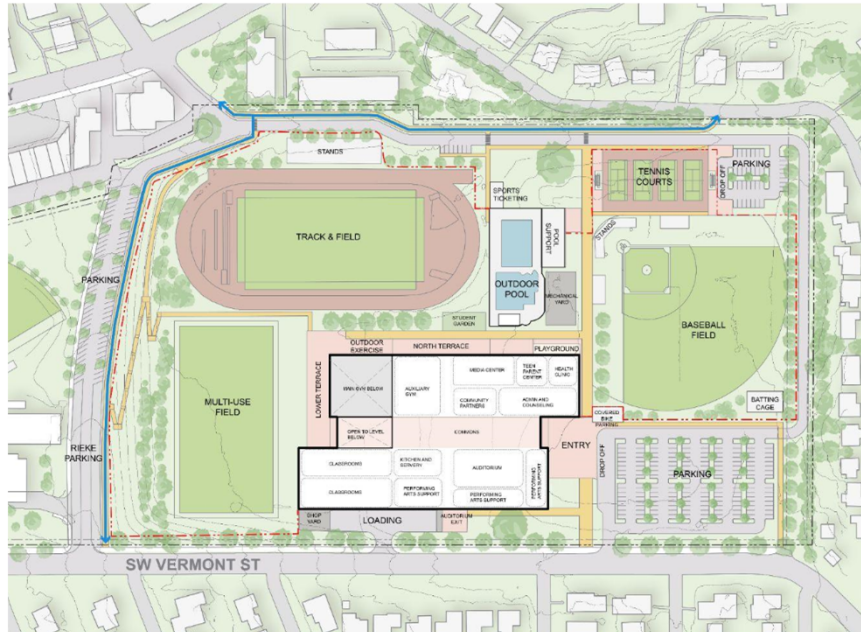


March 2024

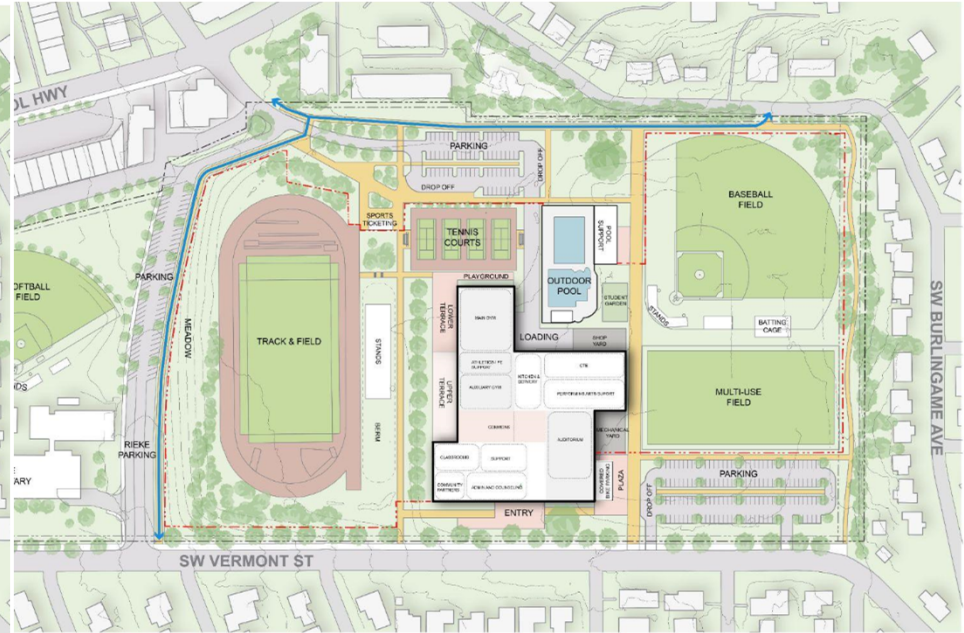


Schemes 1 and 2 – side by side comparison

Scheme 1 - Approx. Cost: Baseline \$425-435M



Scheme 2 - Approx. Cost: \$6-8M over Baseline



Keeping Track and Field in existing location and providing improvements allows for:

- Less Track & Field disruption during construction
- Keeps existing seating, over 2100 seats (New provides approx. 1,700 per Ed Spec)
- Lower site cost

Moving Track and Field allows for:

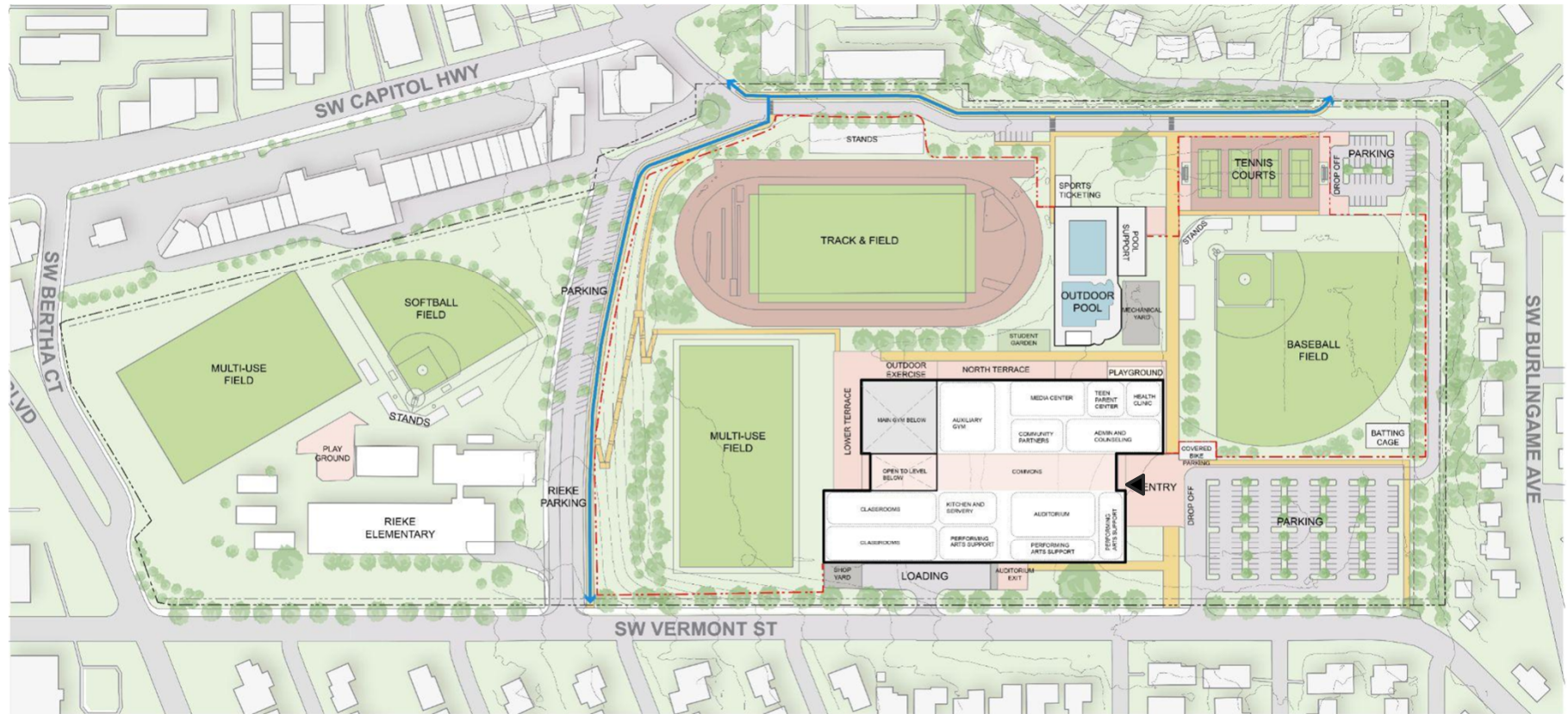
- Direct and visible connection with Capital Hwy
- Optimal N/S orientation of the track & field for Sun



Ida B Wells HS Modernization Planning & Design



SCHEME 1



SCHEME 01



KEY:

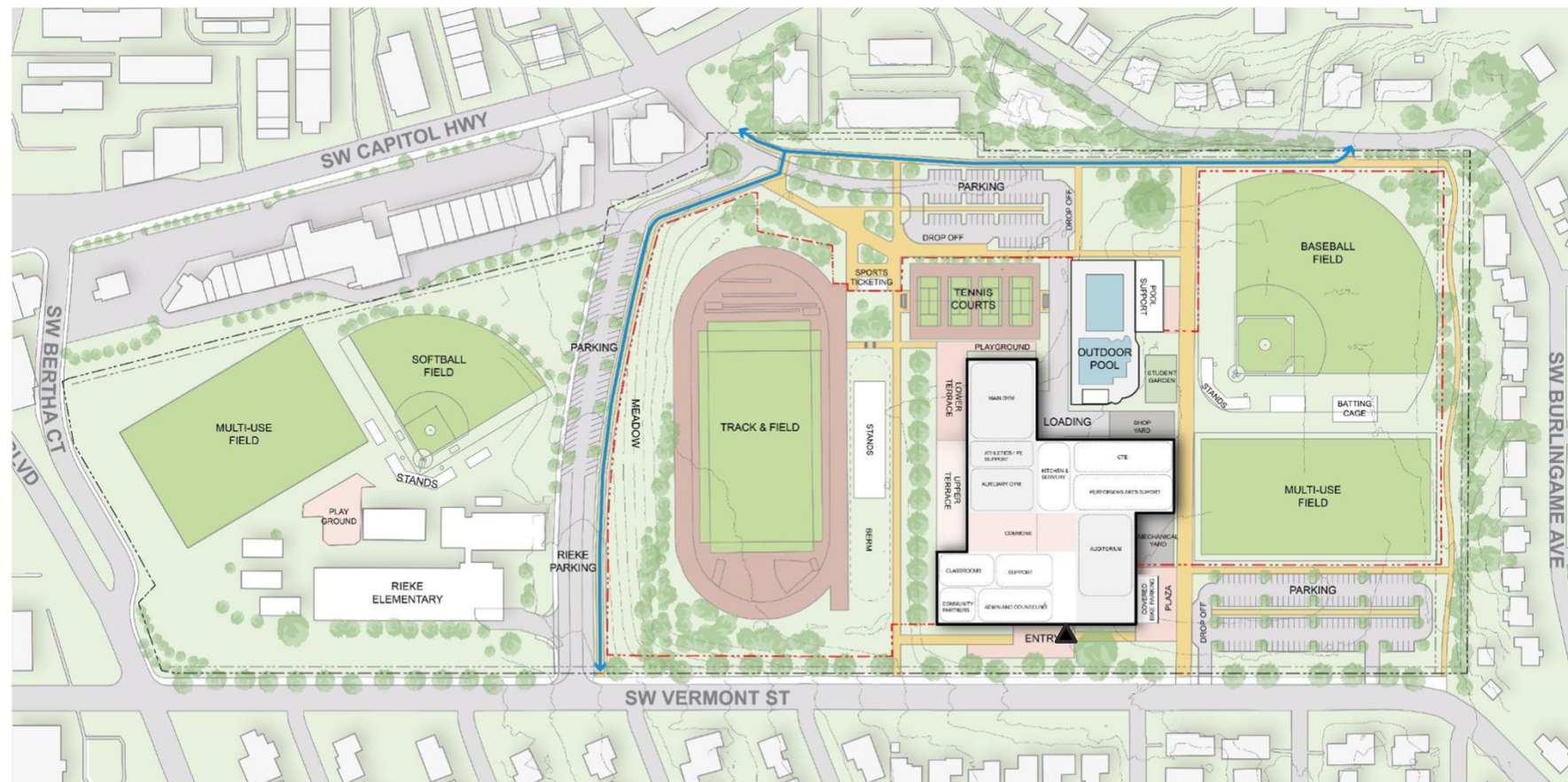
Securable Perimeter

SW Trails





SCHEME 2



SCHEME 02



KEY:

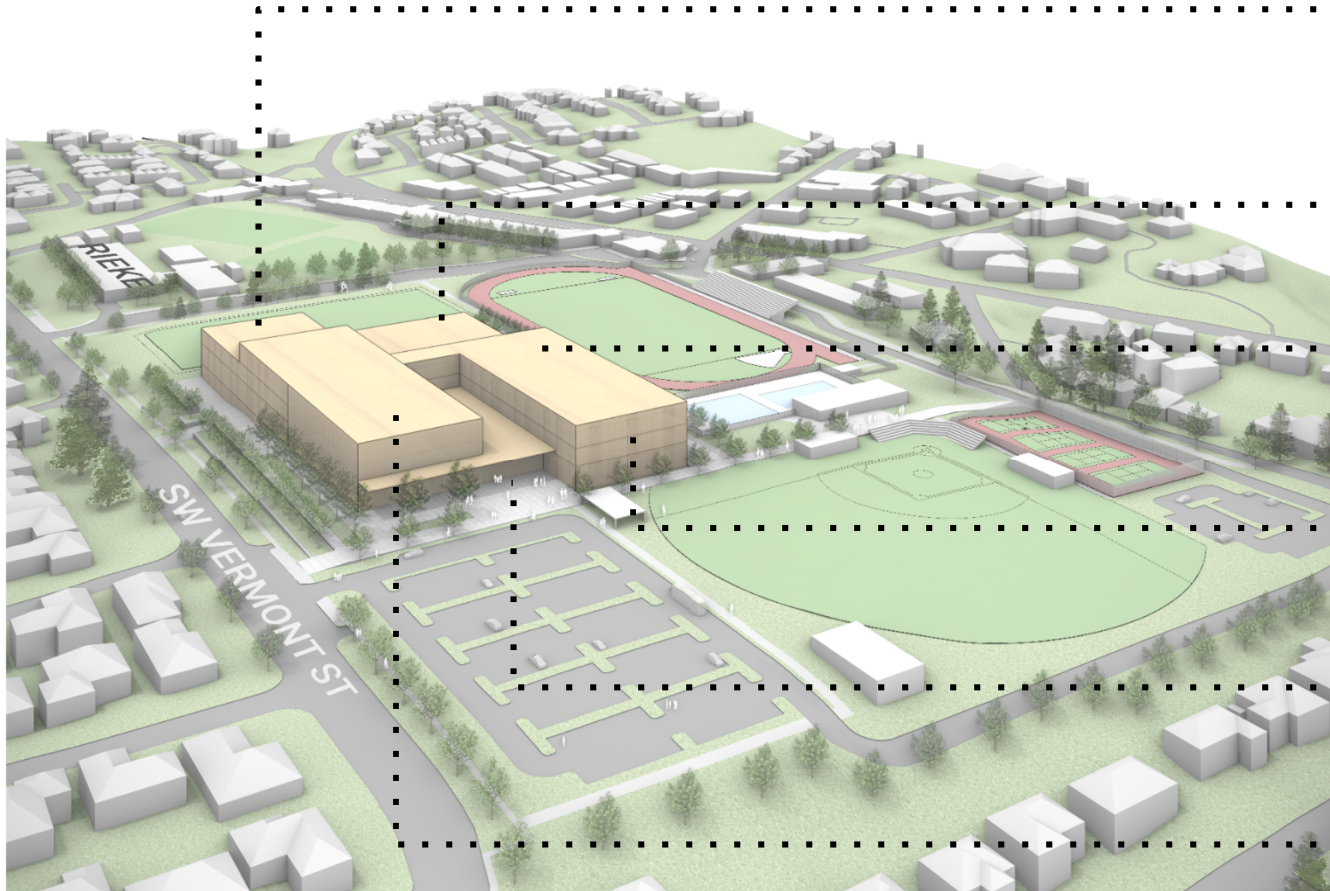
Securable Perimeter

SW Trails





SCHEME 1



Building form steps up with topography; lower level at grade with western portion of site

Gyms and athletics close to track & field and multi-use field

Primary "bars" running east-west to minimize western sun exposure

Classrooms primarily on upper levels

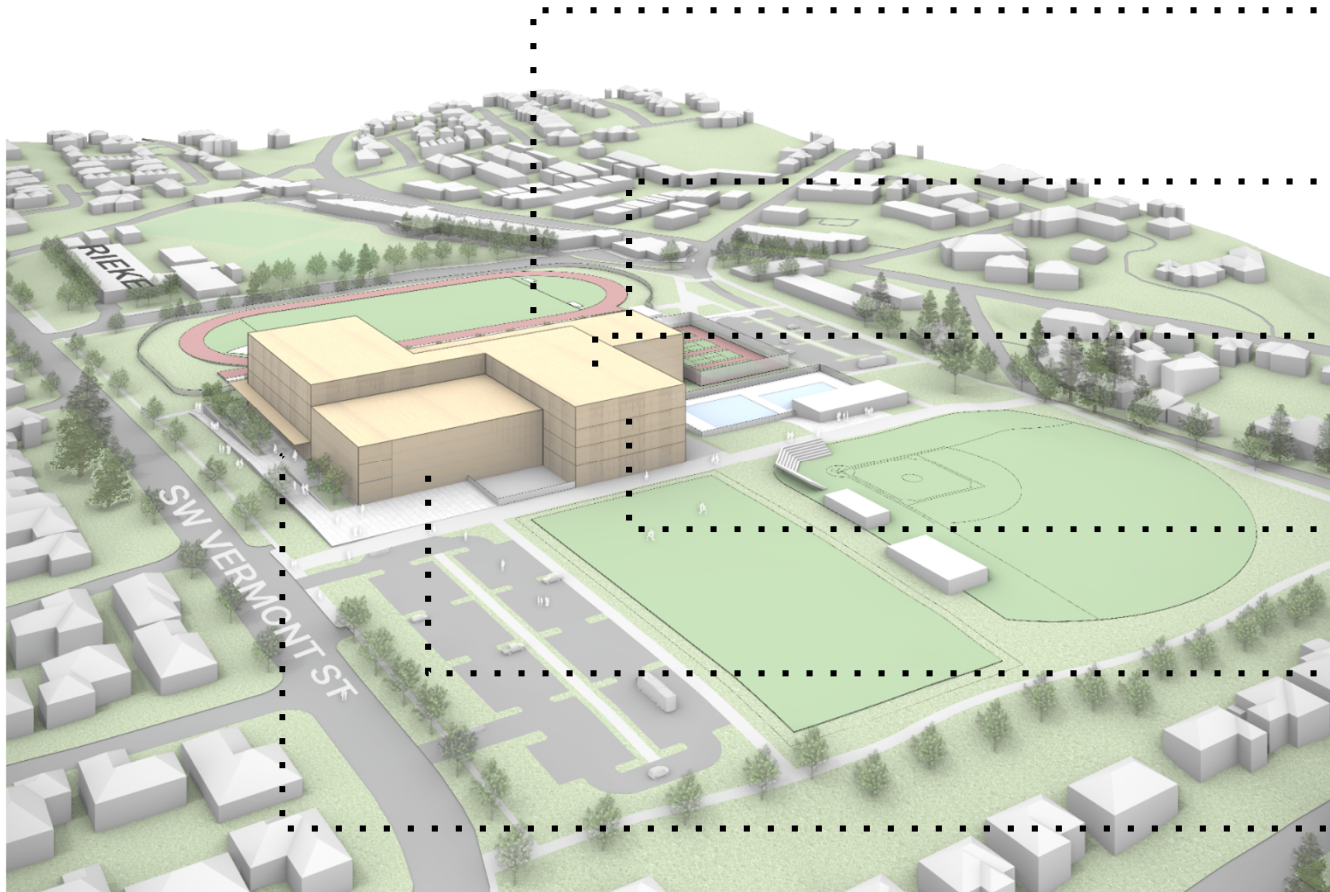
Main entry plaza connected to North-South pedestrian path

Auditorium close to main entry

Massing - Aerial View



SCHEME 2



Building form connects to both Capitol Hwy and Vermont St. approaches

Gyms and athletics close to track & field and Capitol Hwy. approach

Primary "bars" running east-west to minimize western sun exposure

Classrooms on upper levels

Auditorium close to main entry

Main entry visible and easy to approach from Capitol Hwy and Vermont St.

Massing - Aerial View



EXISTING HS



Massing - View from Capitol Hwy Approach



SCHEME 1



Massing - View from Capitol Hwy Approach – Showing Existing Grandstands



SCHEME 2



Massing - View from Capitol Hwy Approach – Track and Field moved



Cleveland HS Modernization Planning & Design



Cleveland HS Modernization Planning & Design

March 2024

PPS Team Lead: Erik Gerding

Design: Mahlum Architects

Construction: n/a

STATUS AT A GLANCE

Legend:

	As planned: no concerns
	Caution: requires attention
	Impacts: impacts occurring

	As Planned	Caution	Impacts
Budget	X		
Equity*			
Schedule	X		
Overall	X		

BUDGET

BUDGET		FUNDING		PROGRESS		FORECAST		CONTINGENCY IN CONTEXT	
Original Budget	Current Budget	Bond Funds	Other Funds	Actuals to Date	Additional Encumbered	Estimate At Completion	Over/Under	Work Complete / %	Contingency Remain / %
20,000,000	20,000,000	20,000,000	-	518,918	1,206,764	20,000,000	-	0%	4.98%

EQUITY

Percent of payments made to Certified owned businesses, percent of labor hours of apprenticeable trades; cumulative

	MBE	WBE	SDVBE	ESB	N-C	TOTAL	goal	MIN	goal	FEM	goal	APPR	req
Consultants	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	18%						
Contractors*	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	18%						
Overall	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	18%						
Workforce*								0%	25%	0%	14%	0%	20%

* No construction in this design/planning project.

SCHEDULE

NEXT MILESTONE:

Master Plan Approval

On Track?

Yes

PROJECT PHASE	2024				2025				2026				2027			
Planning																
Design																
Construction																
School Opening(s)																

Baseline

Planning

Design

Construction

School Opening



Community Engagement Summary

Comprehensive Planning Committee (CPC)

- 5 CPC meetings so far. Next meeting scheduled for March 21st.

CHS Teachers and Staff:

- 2 Staff meeting presentations and feedback exercises.

CHS Students

- Presentation and feedback exercises with student leadership classes.
- School newspaper article.

General Community & Affinity Groups:

- 2 Design Workshops with over 60 people at each event.
- Community survey is out for input on the historic structure.
- Open House scheduled for March 16th.
- Engagement Sessions with Affinity Groups and Community Based Organizations



Planning Options

Partial Existing
(Retain 1929 Building)

01



Approx. \$10M Over Baseline

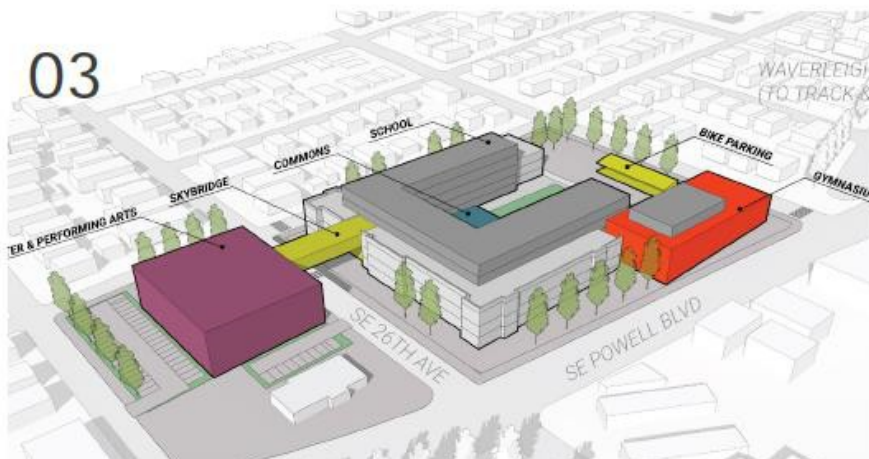
All New Construction

02



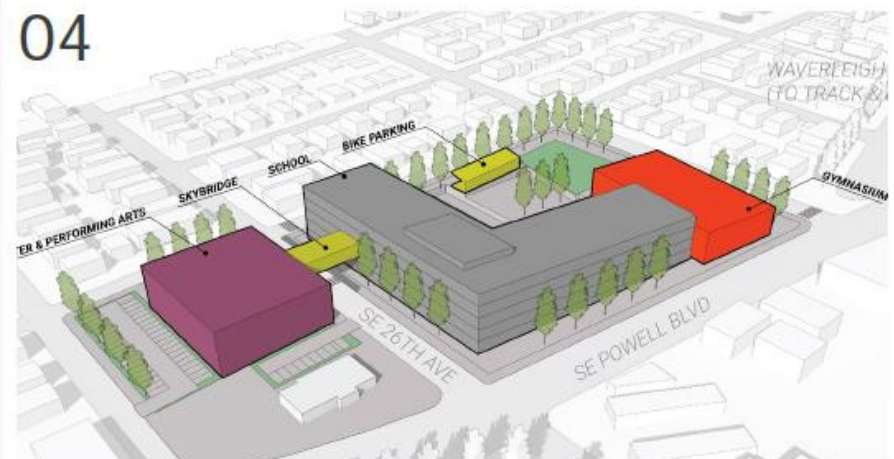
Baseline Cost Approx. \$400M - \$415M

03



Approx. \$35M Over Baseline, Longer Schedule

04



Approx. \$25M Over Baseline, Longer Schedule



CHS Existing Campus – Demo Area for Options #1 and #3

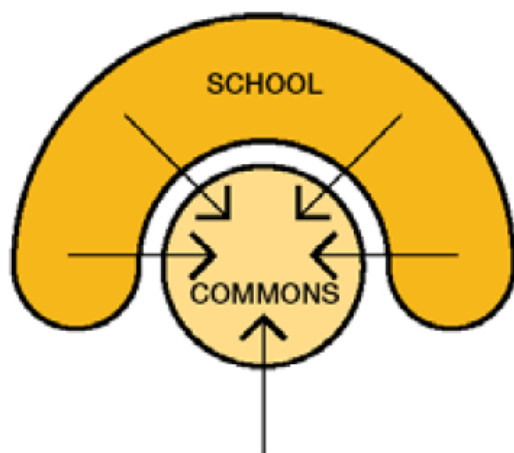




High School Ed. Spec. Planning Principle – School Heart

INTRODUCTION TO HIGH SCHOOL PLANNING PRINCIPLES

The concept and diagrams presented below are aspirational desires for the design of comprehensive high schools in PPS. They are conceptual and aspirational and as such are not design requirements. While the modernization of existing buildings will require these concepts and themes be modified to fit within existing structures, the concepts of these principles should be incorporated to the greatest extent feasible.



SCHOOL "HEART"

High schools should have a recognizable center, a heart, that represents the school's highest ideals. This place should be accessible by all. It should act like a town square, a gathering and social place from which all other functions in the school spring. It should display the best the school has to offer and celebrate daily, monthly and yearly successes.



Baseline Option: \$400M - \$415M

2 Consolidated / All New

Open Space - School Heart



Takeaways: Medium open space on site;
More on-site parking available.



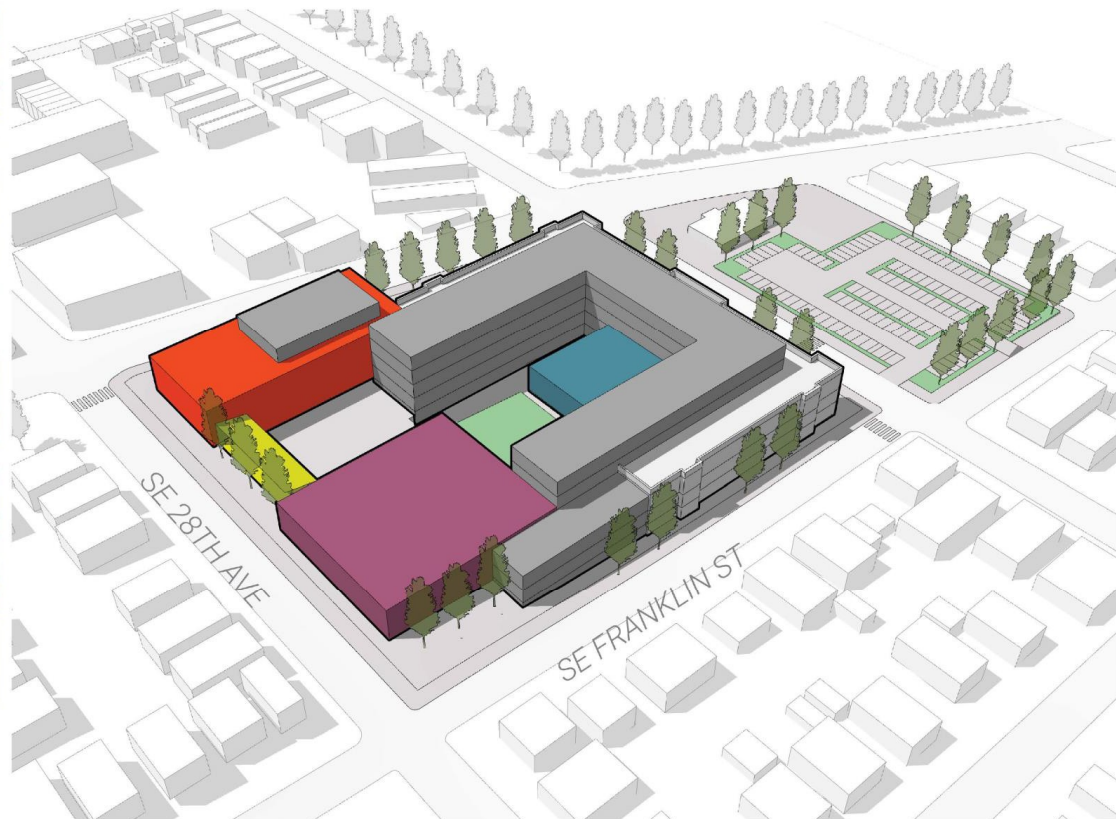
Approx. \$10M above Baseline Option

1 Consolidated / Partial Existing

Open Space - School Heart



Takeaways: Smallest open space on site; More on-site parking available.

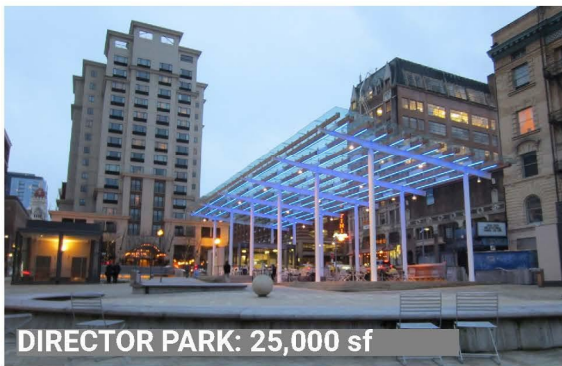




Approx. \$25M above Baseline Option

4 Distributed / All New

Open Space - School Heart



Takeaways: Largest open space on site;
Less on-site parking available.



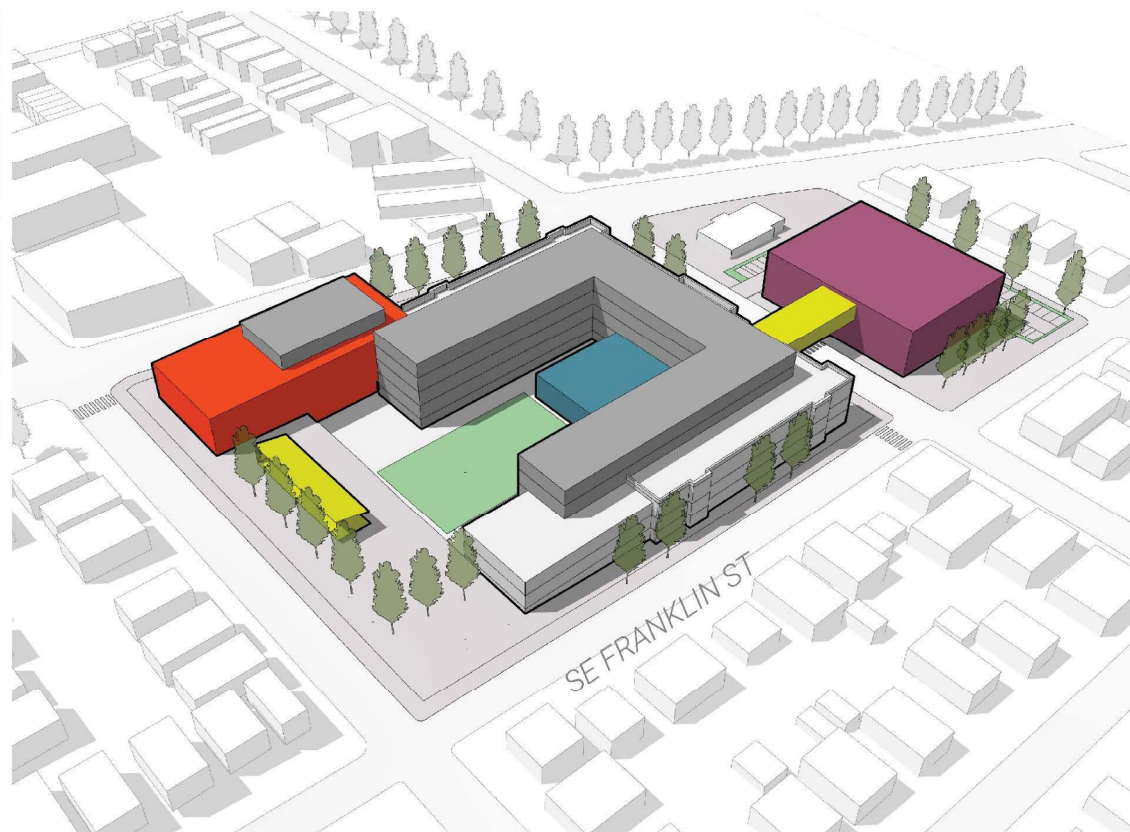
Approx. \$35M above Baseline Option

3 Distributed / Partial Existing

Open Space - School Heart



KELLOGG MS PLAZA: 17,000 sf



Takeaways: Medium open space on site;
Less on-site parking available.



Business Equity Presentation



Equity In Public Purchasing & Contracting (EPPC)

BOARD



Equity in Public Purchasing & Contracting Policy

Staff

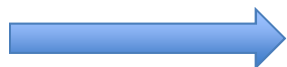
Purchasing &
Contracting - lead



- **Business Equity Administrative Directive**
- Workforce Equity Administrative Directive
- Career Learning Equity Administrative Directive

Staff

Certified Business
Program Manager-
lead



- Implementation strategies
- Data tracking
- Reporting



Business Equity Administrative Directive

The goal of the Business Equity Administrative Directive is to provide greater professional, supplier, construction and personal service opportunities to Certified Businesses.

- Aspirational goal of 18% participation of Certified Businesses in consultant services (A/E) and construction contracts
- Active participation in Certified Business advocacy groups
- Active participation in trade shows and similar events targeted toward Certified Businesses
- Notification of Certified Business vendors about contracting opportunities
- Inclusion of evaluation criteria in RFPs that support increased Certified Business participation
- Active solicitation of Certified Businesses in intermediate/informal and small dollar procurements



What is a “Certified Business?”

PPS accepts the following certifications:

Oregon (COBID)

- MBE Minority Business Enterprise
- WBE Woman Business Enterprise
- SDV Service Disabled Veteran
- ESB Emerging Small Business

Washington (OMWBE)

- MBE Minority Business Enterprise
- WBE Woman Business Enterprise

Federal

- DBE Disadvantaged Business Enterprise, as certified in Oregon, Washington, or California



Business Equity Implementation Strategies

- Outreach and Engagement
- Contracting
- On the Job
- Training and Technical Assistance
- Data and Analysis



Outreach & Engagement Practices

- Flexible Service Contractor Pools (FSCPs)

Through proactive notification, clear explanations, and encouragement, we aim to facilitate active participation in our Flexible Services Contractor Pools, also known as on-call master contracts, fostering opportunities for multiple awarded contractors to engage in projects within the \$100,000 and less range, thereby providing an ideal platform for smaller businesses and those seeking entry into government work.

- Partnerships and Joint Ventures (JVs)

Engaging in discussions and actively facilitating collaborative efforts, we work to encourage the formation of partnerships and joint ventures, whether between larger prime contractors or among smaller certified companies, aiming to enhance opportunities for mutual growth and success.

- Membership Meetings

Creates valuable opportunities to connect with and meet certified businesses affiliated with organizations such as OAME, NAMC, PBDG, and LatinoBuilt, fostering a network that enhances collaboration and inclusivity within the business community.



Outreach & Engagement Practices

- Targeted Member Meetings

Held at and in collaboration with OAME, NAMC, PBDG, and LatinoBuilt, offer a more focused exploration and in-depth discussion about government contracting, helping attendees assess its suitability for their businesses, providing detailed insights into PPS offerings, and outlining the numerous opportunities available through approximately 100 projects each year.

- Trade Shows

Attend trade shows put on by local agencies and organizations to meet certified businesses and discuss how to get involved with working with PPS.

- Contractor Spotlight

Host one certified businesses at our project teams monthly meeting to give businesses a chance to meet our OSM, FAM, and facilities teams and for PPS to meet these businesses.

- Open House

Host a twice-yearly open house for certified businesses to network and meet PPS PM's and purchasers, prime contractors, and other certified businesses to build relationships and opportunities to work on PPS or other projects.



Outreach & Engagement Practices

- Certified Business Advisory Committee

Employees of and business members from OAME, NAMC, PBDG, and LatinoBuilt attend a quarterly meeting to discuss PPS equity data and equity practices strategies to help PPS ensure meaningful and impactful work is occurring. Discuss pros and cons of existing PPS equity practices as well as potential new practices.



Contracting Practices

- Language Alignment

Contract language is regularly reviewed to ensure it effectively conveys and aligns with the intent and message of the EPPC and AD regarding Business Equity, Workforce Equity, and Career Learnings.

- Evaluation Criteria

Standardized evaluation criteria have been developed to prioritize firms that have demonstrated equitable business and workforce practices and policies, as well as specific plans for improving Certified Business participation in project workforces.

- Direct Awards

PPS focuses on giving smaller and new businesses direct awards to build new relationships with PPS and help small businesses get experience and capacity for government work.

- Welcome Communication

Companies receive a welcome letter encompassing Business Equity, Workforce Equity, and Career Learning requirements and next steps, emphasizing the importance of sharing this information with all subcontractors.



On the Job

- Respectful Workplace Program

A Respectful Workplace Program requirement has been added, beginning with the Jefferson HS Modernization project, to all CM/GC contracts and applicable to all prime contractors and subcontractors involved, to ensure a commitment to fostering a positive and inclusive work environment



Training and Technical Assistance

- 1-on-1 Assistance

We provide help to Certified Businesses looking to work with PPS, including:

- *What government work requires of contractors and subcontractors*
- *What PPS work is typically or currently available*
- *How to get started with bidding on PPS work*
- *Important requirements of the bidding process*
- *How to write an effective proposal for an RFP*
- *Any other help that can be provided on a case-by-case basis*



Data and Analysis

- **Board of Education Annual Report**
Purchasing & Contracting provides an annual report of equity data to the PPS Board of Education, typically in the fall.
- **BAC Quarterly Reports**
Business and workforce equity data (cumulative and rolling 12-month) for OSM, as a whole, is reported quarterly to the Bond Accountability Committee. Cumulative business and workforce equity data for projects are provided with project status reports, typically twice per year for each project.
- **BOE Facilities & Operations Committee Quarterly Reports**
BAC reports including equity data are provided by OSM in a quarterly report to the Facilities & Operations Committee.
- **Website**
BAC reports including equity data are posted on our BAC webpage, as well as individual project reports posted to project webpages. We are also working on webpages specific to our equity practices and data, which will include a public dashboard of data.



Successes

- Flexible Service Contractor Pools (FSCPs)
 - *26% awarded to Certified Businesses prior to 2023*
 - *41% awarded to Certified Businesses since January 2023*
- Contractor Spotlights
 - *6 of 13 contractors highlighted have received work as a result of their presentation*
- New companies working with PPS since January 2023
 - *10 from FSCPs*
 - *6 from Quotes*
 - *3 from Direct Awards*
 - *2 from Bids*



Bond Planning Update



Adjourn

**Next meeting:
May 2024
(virtual meeting, date TBD)**