



# Bond Accountability Committee Meeting

April 18, 2017



## Agenda

- **Welcome & Introductions** 5:30 pm
- **Public Comments** 5:35 pm
- **Program Update** 5:45 pm
- **Project Reports** 6:30 pm
- **Questions** 7:10 pm
- **Wrap-Up and Adjourn** 7:20 pm

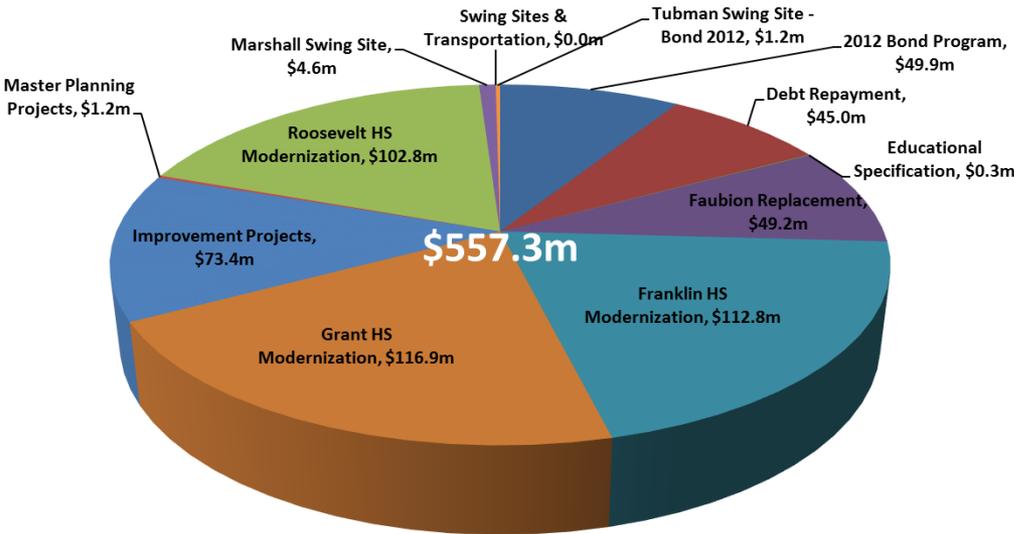


# Public Comments



# Program Update

## Program Projected Budget Break-Down



## Balanced Scorecard Program Status

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

## Comments

1. Franklin HS is in the Construction Phase
2. Roosevelt HS in the Construction Phases 2
3. Faubion PK-8 is in the Construction Phase
4. Grant HS is in the Construction Documents Phase
5. IP15 is in the Close-Out Phase
6. IP16 is in Close-Out and Construction Phases
7. IP17 is Complete with modified design scope

## 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	Jul 2017																		
Roosevelt HS	Nov 2017																		
Grant HS	Mar 2019																		
Faubion PK-8	Aug 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 2
3. Faubion PK-8 will continue in the Construction Phase
4. Grant will be in the Demo & Construction Document Phase
5. IP15 will be Closed-Out
6. IP16 will be in Close-Out except the elevator at Chavez



## Program Update

- **Winter/Spring Bond Construction Tours Update**
  - Franklin
  - Roosevelt
  - Faubion
- **OSM Staffing Update**
- **Summer 2017 Move Management Coordination**
- **Upcoming New Performance Audit RFP**
- **Change Order Audit**



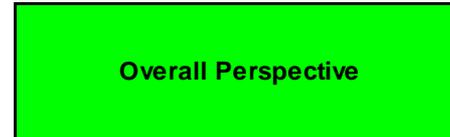
# Program Update

## Balanced Scorecard – Overall Perspective

### Narrative Comments:

- 1.. Franklin, Faubion and Roosevelt continue to make good progress towards opening facilities in fall 2017.
2. The Grant team is very busy with construction documents, submitting the first phase of building permits, managing the conditional use process, and procuring early subcontract work. The current construction market has impacted the Grant construction costs however a plan is in place to keep the project on track.
3. The Scott elevator is nearing completion while the Cesar Chavez elevator is preparing to begin phase 2 over the summer and complete by the end of the year.

Color Key	
	Good
	Concerns
	Difficulty



Perspective	Perform
Budget	
Schedule	
Stakeholders	
Equity	
Average	

### 2012 Bond Projects

Grant HS	Roosevelt HS	Franklin HS	Faubion K8	Improvements 2015	Improvements 2016	Improvements 2017	Marshall Campus	Tubman			Program Contingency	Program Mgmt

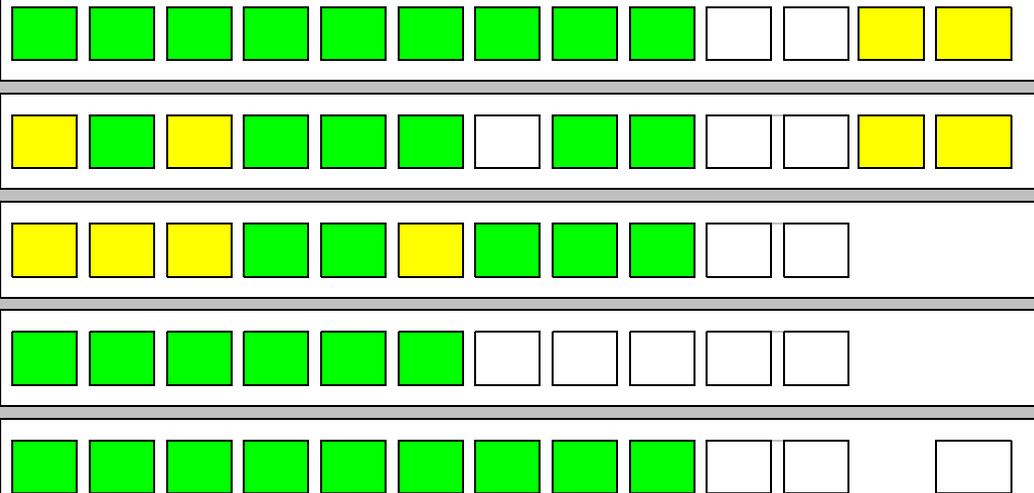
Overall Project Performance

Perspective Budget

Perspective Schedule

Perspective Stakeholders

Perspective Equity





# Program Update

## Balanced Scorecard – Stakeholder Perspective

### Narrative Comments:

1. Feedback continues to be largely positive.

Color Key	
	Good
	Concerns
	Difficulty



Strategic Obj.	Perform
A	
B	
C	
Average	

### 2012 Bond Projects

Grant HS	Roosevelt HS	Franklin HS	Faubion K8	Improvements 2015	Improvements 2016							
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Strategic Objectives	Performance Measures	Performance Targets
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Objective A Meets Educational Needs	1	Project Scope Meets Educational Needs	Green: Rating of ≥ 4.0 (1 - 5 scale)
	2	Design Meets Educational Needs	Yellow: 3.0 - 4.0
	3	Construction Meets Educational Needs	Red: < 3.0


Objective B Meets Maintenance / Facility Needs	4	Project Scope Meets Maint. / Facility Needs	Green: Rating of ≥ 4.0 (1 - 5 scale)
	5	Design Meets Maint. / Facility Needs	Yellow: 3.0 - 4.0
	6	Construction Meets Maint. / Facility Needs	Red: < 3.0


Objective C Design Advisory Group (DAG) Needs	7	Master Planning: Scope Meets DAG Needs	Green: Rating of ≥ 4.0 (1 - 5 scale)
	8	Design Meets DAG Needs	Yellow: 3.0 - 4.0;
	9	Construction Meets DAG Needs	Red: < 3.0




# Program Update

## Balanced Scorecard – Equity Perspective

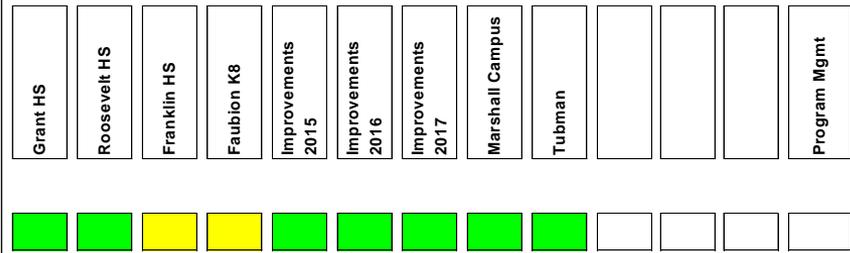
### Narrative Comments:

- OSM is currently exceeding the 18% aspirational goal for consultant contracts (20%), while construction contracts are tracking at 12%.
- The program has exceeded \$1M trade hours worked with over one-quarter of them performed by apprentices.
- OSM exceeded all student participation goals for 2016. Activities are now being planned for 2017.



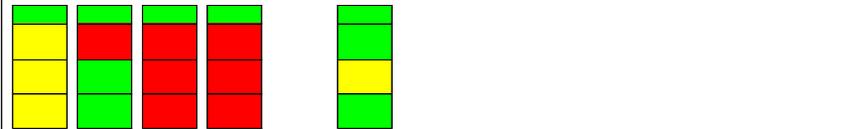
Strategic Obj.	Perform
A	
B	
C	
Average	

### 2012 Bond Projects



Strategic Objectives	Performance Measures	Performance Targets
----------------------	----------------------	---------------------

Objective A Meets Aspirational Certified	1	Project objectives established	
	2	Consultants - % of payments made to Certified owned	Green: Certified >18% Yellow: Certified >10% Red: Certified <10%
	3	Contractors - % of payments made to Certified owned	
	4	Project Overall - % of payments made to Certified owned	



Objective B Meets student 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





# Program Update

## Balanced Scorecard – Budget Perspective

<p><b>Narrative Comments:</b></p> <ol style="list-style-type: none"> <li>Faubion is less than three months from substantial completion and is tracking right on budget. This project has incurred the most weather related impacts (largely due to the record rainfall) which have had both schedule and cost impacts.</li> <li>Roosevelt is putting the finishing touches on all significant structural work. We should be largely out of the "unknowns" portion of the project allowing RFIs and cost changes to reduce. Anticipating a modes overall savings.</li> <li>Franklin is largely into finish work now with a few large site items still needing some design and costing attention. Tracking to be right on budget.</li> <li>Grant has taken the brunt of the current construction market pricing increases. Cost estimates at 100% DDs have come in higher than originally budgeted (but not unexpected). OSM has put in place a strategy to further refine the scope of work while still providing the entire program and providing funding as needed.</li> </ol>			<div style="display: flex; justify-content: space-between; align-items: center;"> <div style="border: 1px solid black; padding: 5px;"> <p><b>Color Key</b></p> <table style="font-size: small;"> <tr><td style="background-color: green; width: 15px; height: 10px;"></td><td>Good</td></tr> <tr><td style="background-color: yellow; width: 15px; height: 10px;"></td><td>Concerns</td></tr> <tr><td style="background-color: red; width: 15px; height: 10px;"></td><td>Difficulty</td></tr> </table> </div> <div style="text-align: center; flex-grow: 1;"> <div style="background-color: yellow; border: 2px solid black; padding: 10px; font-weight: bold; font-size: 1.2em;">Budget Perspective</div> </div> <div style="border: 1px solid black; padding: 5px;"> <p><b>Strategic Obj. Perform</b></p> <table style="font-size: small;"> <tr><td style="width: 20px; height: 10px; background-color: green;">A</td><td style="width: 10px; height: 10px; background-color: green;"></td></tr> <tr><td style="width: 20px; height: 10px; background-color: green;">B</td><td style="width: 10px; height: 10px; background-color: green;"></td></tr> <tr><td style="width: 20px; height: 10px; background-color: green;">C</td><td style="width: 10px; height: 10px; background-color: green;"></td></tr> <tr><td style="width: 20px; height: 10px; background-color: yellow;">D</td><td style="width: 10px; height: 10px; background-color: yellow;"></td></tr> <tr><td style="width: 20px; height: 10px; background-color: yellow;">Average</td><td style="width: 10px; height: 10px; background-color: yellow;"></td></tr> </table> </div> </div>													Good		Concerns		Difficulty	A		B		C		D		Average	
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C																														
D																														
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2012 Bond Projects																														
Strategic Objectives	Performance Measures	Performance Targets	Grant HS	Roosevelt HS	Franklin HS	Faubion K8	Improvements 2015	Improvements 2016	Improvements 2017	Marshall Campus	Tubman	Program Contingency	Program Mgmt																	
			Yellow	Green	Yellow	Green	Green	Green	White	Green	Green	White	White	Yellow	Yellow															
Objective A Project Budget and Scope	1 Initial Cost Estimate of Approved Scope	≥ 10% Contingency Available	Green	Green	Green	Green	Green	Green	White	Green	Green	White	White	White	White															
	2 Master Plan	Within Budgeted Amount	Green	Green	Green	Green	Green	Green	White	Green	Green	White	White	White	White															
Objective B Planning & Design Costs within Budget	3 Projected Total P & D Costs	Within Budgeted Amount	Yellow	Green	Green	Green	Green	Yellow	White	Green	Green	White	White	White	White															
Objective C Construction Costs within Budget	4 Construction Cost Award Price or GMP	Within Budgeted Amount	White	Yellow	Yellow	Yellow	Green	Red	White	Green	Green	White	White	White	White															
	5 Construction Cost Current Estimate thru 50% complete	>5% project level contingency	White	Yellow	Green	Yellow	Green	Red	White	Green	Green	White	White	White	White															
Objective D Project within Budget	6 Total Project Costs Within Budgeted Amount	Within Budgeted Amount	Red	Yellow	Yellow	Yellow	Green	Green	White	Green	Green	White	White	Yellow	Yellow															



# Program Update

## OSM Project Management Cost Report

Resources	January	Changes	Current
GO Bond	482,000,000		482,000,000
Bond Sale Premium	47,081,952		47,081,952
Earned Interest	605,374	1,850,384	2,455,758
Concordia University	15,510,000		15,510,000
State Rehabilitation Grant Program (SRGP)	3,166,011		3,166,011
SRGP Match (Fund 405)	85,068		85,068
Senate Bill 1149	1,606,015		1,606,015
Facilities & Asset Management (FAM)	219,817	48,787	268,604
Energy Trust	56,080	26,700	82,780
Debt Savings (Fund 405)	783,880		783,880
Verizon Roof Design	7,478		7,478
Great Field Funds	65,517		65,517
Partner Contributions	183,000		183,000
Qualified Zone Academy Bonds		4,000,000	4,000,000
	<b>551,370,192</b>	<b>5,925,871</b>	<b>557,296,063</b>



# Program Update

## OSM Project Management Cost Report

Project Name	Prior Meeting Budget	Current Budget	Delta
Franklin HS Modernization	112,753,859	112,805,887	52,027
Grant HS Modernization	116,894,081	116,895,781	1,700
Roosevelt HS Modernization	98,838,790	102,838,790	4,000,000
Faubion Replacement	49,211,939	49,240,867	28,928
Improvement Project 2013	11,963,139	11,963,139	-
Improvement Project 2014	17,811,788	17,811,788	-
Improvement Project 2015	13,623,142	13,623,142	-
Improvement Project 2015 - Maplewood	1,518,698	1,518,698	-
Improvement Project 2015 - SCI	2,057,687	2,057,687	-
Improvement Project 2016	16,240,783	16,240,783	-
Improvement Project 2017	10,232,864	10,232,864	-
Improvement Project 2018	1,969,002	-	(1,969,002)
Improvement Project 2019	273,995	-	(273,995)
Master Planning - Benson HS	398,642	398,642	-
Master Planning - Cleveland HS	-	-	-
Master Planning - Jefferson HS	-	-	-
Master Planning - Lincoln HS	400,000	357,094	(42,906)
Master Planning - Madison HS	400,000	400,000	-
Master Planning - Wilson HS	-	-	-
Marshall Swing Site - Bond 2012	4,609,080	4,609,080	-
Tubman Swing Site - Bond 2012	1,963,479	1,164,776	(798,703)
Swing Sites & Transportation	-	-	-
Educational Specification	275,168	275,168	-
Debt Repayment	45,000,000	45,000,000	-
2012 Bond Program	44,934,059	49,861,881	4,927,822
	<b>551,370,195</b>	<b>557,296,067</b>	<b>5,925,871</b>

### Notable Budget Changes

- **Added Earned Interest**
- **Added QZAB Funds**
- **Removed Funds from IP2018 & IP2019**
- **Closed Tubman**



# Program Update

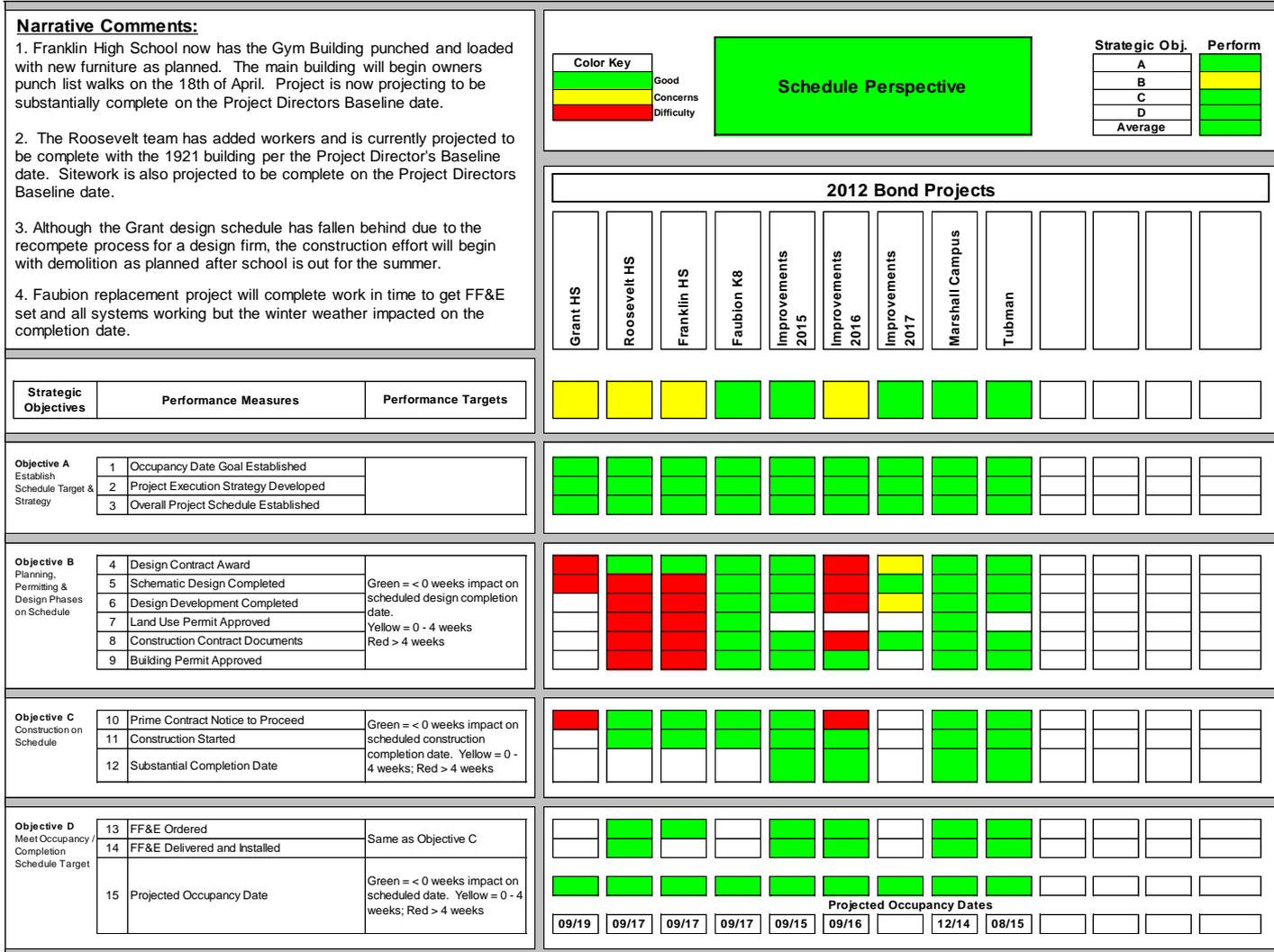
## OSM Project Management Cost Report

Project Name	Original Budget A	Approved Budget Changes B	Current Budget C (B + C)	Current Commitments D	Estimate At Completion E	Forecasted Over/(Under) F (E - C)	Actuals Approved G	Estimated Final Project Cost H	Estimated Over/(Under) Budget I (H-C)
Franklin HS Modernization	81,585,655	31,220,232	112,805,887	109,343,217	112,315,177	(490,710)	90,404,183	112,805,887	-
Grant HS Modernization	88,336,829	28,558,952	116,895,781	11,488,562	128,790,714	11,894,933	5,141,726	139,954,232	23,058,451
Roosevelt HS Modernization	68,418,695	34,420,095	102,838,790	94,742,205	101,643,852	(1,194,938)	78,976,148	102,000,000	(838,790)
Faubion Replacement	27,035,537	22,205,330	49,240,867	47,355,414	48,659,337	(581,530)	35,566,712	49,240,867	-
Improvement Project 2013	9,467,471	2,495,668	11,963,139	11,963,139	11,963,139	-	11,963,139	11,963,139	-
Improvement Project 2014	13,620,121	4,191,667	17,811,788	17,811,788	17,811,788	-	17,811,788	17,811,788	-
Improvement Project 2015	13,521,066	102,076	13,623,142	13,497,387	13,497,387	(125,755)	13,473,451	13,497,387	(125,755)
Improvement Project 2015 - Maplewood	-	1,518,698	1,518,698	1,518,698	1,518,698	-	1,518,698	1,518,698	-
Improvement Project 2015 - SCI	-	2,057,687	2,057,687	2,057,686	2,057,686	(1)	2,057,686	2,057,686	(1)
Improvement Project 2016	15,274,437	966,346	16,240,783	16,021,165	16,035,132	(205,651)	14,684,781	16,240,783	-
Improvement Project 2017	6,796,707	3,436,157	10,232,864	1,622,461	1,618,461	(8,614,403)	1,465,909	1,618,461	(8,614,403)
Improvement Project 2018	9,062,119	(9,062,119)	-	-	-	-	-	-	-
Improvement Project 2019	-	-	-	-	-	-	-	-	-
Master Planning - Benson HS	191,667	206,975	398,642	398,642	398,642	-	398,642	398,642	-
Master Planning - Cleveland HS	191,667	(191,667)	-	-	-	-	-	-	-
Master Planning - Jefferson HS	191,667	(191,667)	-	-	-	-	-	-	-
Master Planning - Lincoln HS	191,667	165,427	357,094	357,094	357,094	-	357,094	357,094	-
Master Planning - Madison HS	191,667	208,333	400,000	324,080	324,080	(75,920)	324,070	400,000	-
Master Planning - Wilson HS	191,667	(191,667)	-	-	-	-	-	-	-
Marshall Swing Site - Bond 2012	-	4,609,080	4,609,080	4,070,115	4,070,115	(538,965)	4,070,115	4,070,115	(538,965)
Tubman Swing Site - Bond 2012	-	1,164,776	1,164,776	1,164,776	1,164,776	-	1,164,776	1,164,776	-
Swing Sites & Transportation	9,550,000	(9,550,000)	-	-	-	-	-	-	-
Educational Specification	-	275,168	275,168	275,168	275,168	-	275,168	275,168	-
Debt Repayment	45,000,000	-	45,000,000	45,000,000	45,000,000	-	45,000,000	45,000,000	-
2012 Bond Program	93,181,361	(43,319,480)	49,861,881	26,993,202	38,443,926	(11,417,955)	18,912,217	39,087,277	(10,774,604)
<b>Total</b>	<b>482,000,000</b>	<b>75,296,067</b>	<b>557,296,067</b>	<b>406,004,801</b>	<b>545,945,172</b>	<b>(11,350,895)</b>	<b>343,566,303</b>	<b>559,462,001</b>	<b>2,165,934</b>



# Program Update

## Balanced Scorecard – Schedule Perspective





## Program Update

### Project Updates

- 2017 PPS Grand Openings and Ground Breakings
- Franklin High School
- Roosevelt High School
- Grant High School
- Faubion PK-8
- Tubman Campus
- IP2015
- IP2016
- IP2017
- Master Planning



## 2017 PPS Planned Grand Openings and Ground Breakings

Date	Event	Time
Saturday, June, 3rd	Grant Groundbreaking	10:00-1:00 pm
Tuesday, August 29	Faubion/Concordia University Grand Opening	3:00-5:00 pm
Friday, September 1	Franklin Football Field & Track Opening	6:00-7:00 pm (Start of Football Game)
Saturday, September 2	Franklin Grand Opening	10:45-2:00 pm
Friday, September 29	Roosevelt Grand Opening	TBD

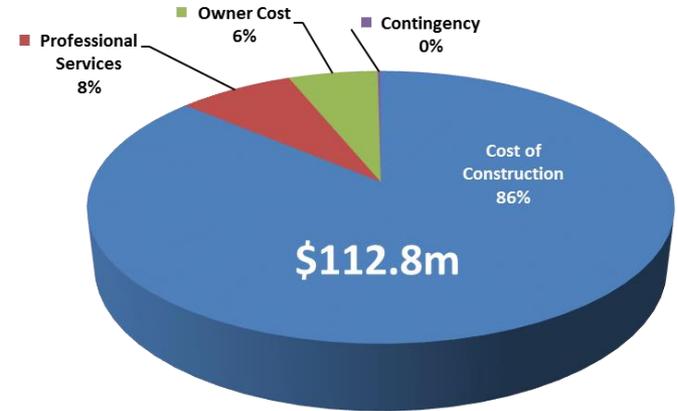


## Project Description

**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:** 25.7 Months  
**Scheduled Completion:** Summer of 2017  
**Design Firm:** DOWA-IBI Group  
**Contractor:** Skanska

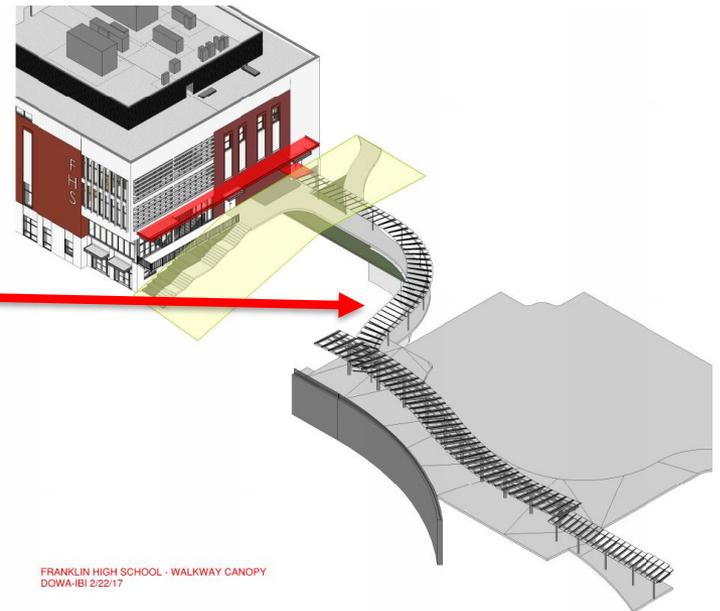
## Projected Budget Breakout



## Comments

1. Current the budget forecast includes costs for the weather delays of approximately \$99K.
  - Project team is still reviewing this change request
2. The project is anticipating the overall schedule to be impacted by the addition of the Sector 6 to Sector 7 walkway with a solar energy generating overhead canopy
3. DOWA has been directed to proceed with the design requirements necessary to return the Southern Section of the Bleachers to the project.
4. SAFETY:
  - Recordable Accidents: 5
  - Reportable Accidents: 0

## Photos





**SKANSKA**

**April 3, 2017**





**Sector 3 Science Classroom**



**Sector 5 Floor of Commons**



**Sector 8 Artificial Turf Field on top of Shock Pad**

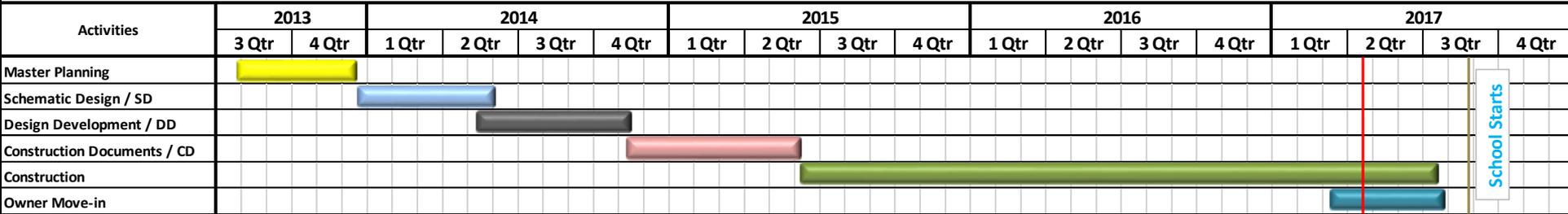


**Sectors 2 Maker Space**



## 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*
CM/GC Begin Mobilize to site	16-Mar-15	16-Mar-15	8-Jun-15	84	8-Jun-15	84	8-Jun-15	84	0	8-Jun-15	84	0
S1 - Performing Arts Center	29-Jun-15	17-Mar-17	29-Jun-15	0	8-May-17	52	29-Jun-15	0	0			
S2 - STEM/CTE	29-Jun-15	30-Nov-16	29-Jun-15	0	4-May-17	155	29-Jun-15	0	0			
S3 - West Wing Classroom Renovations	31-Jul-15	23-Nov-16	31-Jul-15	0	19-Apr-17	147	31-Jul-15	0	0			
S4 - Main Building Renovations	4-Sep-15	29-Dec-16	4-Sep-15	0	1-May-17	123	4-Sep-15	0	0			
S5 - Student Commons	9-Jul-15	16-Feb-17	9-Jul-15	0	1-May-17	74	9-Jul-15	0	0			
S6 - East Wing Renovations	21-Sep-15	2-Dec-16	21-Sep-15	0	18-May-17	167	19-Aug-15	-33	-33			
S7 - Athletic Bldg	22-Jul-15	3-Jan-17	22-Jul-15	0	26-Jan-17	23	22-Jul-15	0	0	27-Feb-17	55	32
S8 - Grandstand & Concessions	28-Jul-16	2-Dec-16	28-Jun-16	-30	10-Jul-17	220	22-Aug-16	25	55			
Athletic Field Construction	17-Nov-15	11-Jul-17	16-Jan-17	426	10-Jul-17	-1	20-Feb-17	461	35			
Owner Move In	21-Mar-17	23-Aug-17	26-Jan-17	-54	31-Jul-17	-23	27-Mar-17	6	60			
Substantial Completion Building	17-Mar-17	17-Mar-17	19-Apr-17	33	18-May-17	62						
Substantial Completion Site	19-Jul-17	19-Jul-17	17-Jul-17	-2	17-Jul-17	-2						

**Changed Schedule Dates**  
Activity has reached some or all completion dates

\* Calendar Days

Construction Status	
Percent Complete Planned:	<b>87%</b>
Percent Complete Actual:	<b>86%</b>
Percent Construction Time Used:	<b>86%</b>



## Project Description

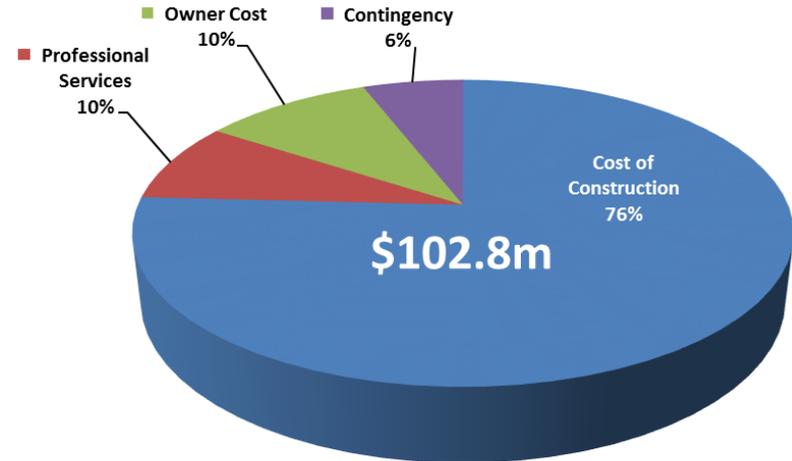
**Brief Project Description:** Full campus modernization to accommodate a student capacity of 1,350 and a core capacity of 1,700 based on master planning and schematic design processes that included stakeholder input. All students are to be housed on site during the phased project construction.

**Current Project Phase:** Construction  
**Construction Start:** Spring of 2015  
**Construction Duration:** 30.9 Months  
**Scheduled Building Completion:** Summer of 2017  
**Design Firm:** Bassetti Architects  
**Contractor:** Lease Crutcher Lewis

## Comments

1. The project was impacted a total of 7 days due to inclement weather going back to December. Overtime by key trades was worked on 7 Saturdays to make up for the delays to negate the weather impacts.
2. Concrete shear walls are complete. Structural steel contract work is complete.
3. Re-Vision has been hired to provide move management assistance for the Phase II move.
4. SAFETY:
  - Recordable Accidents: 1
  - Reportable Accidents: 0

## Projected Budget Breakout



## Photos



**Commons Between Wings**



**April 3, 2017**





**East Wing 1<sup>st</sup> Floor Shoring Dismantled**



**East Wing 2<sup>nd</sup> Floor Plywood Flooring**

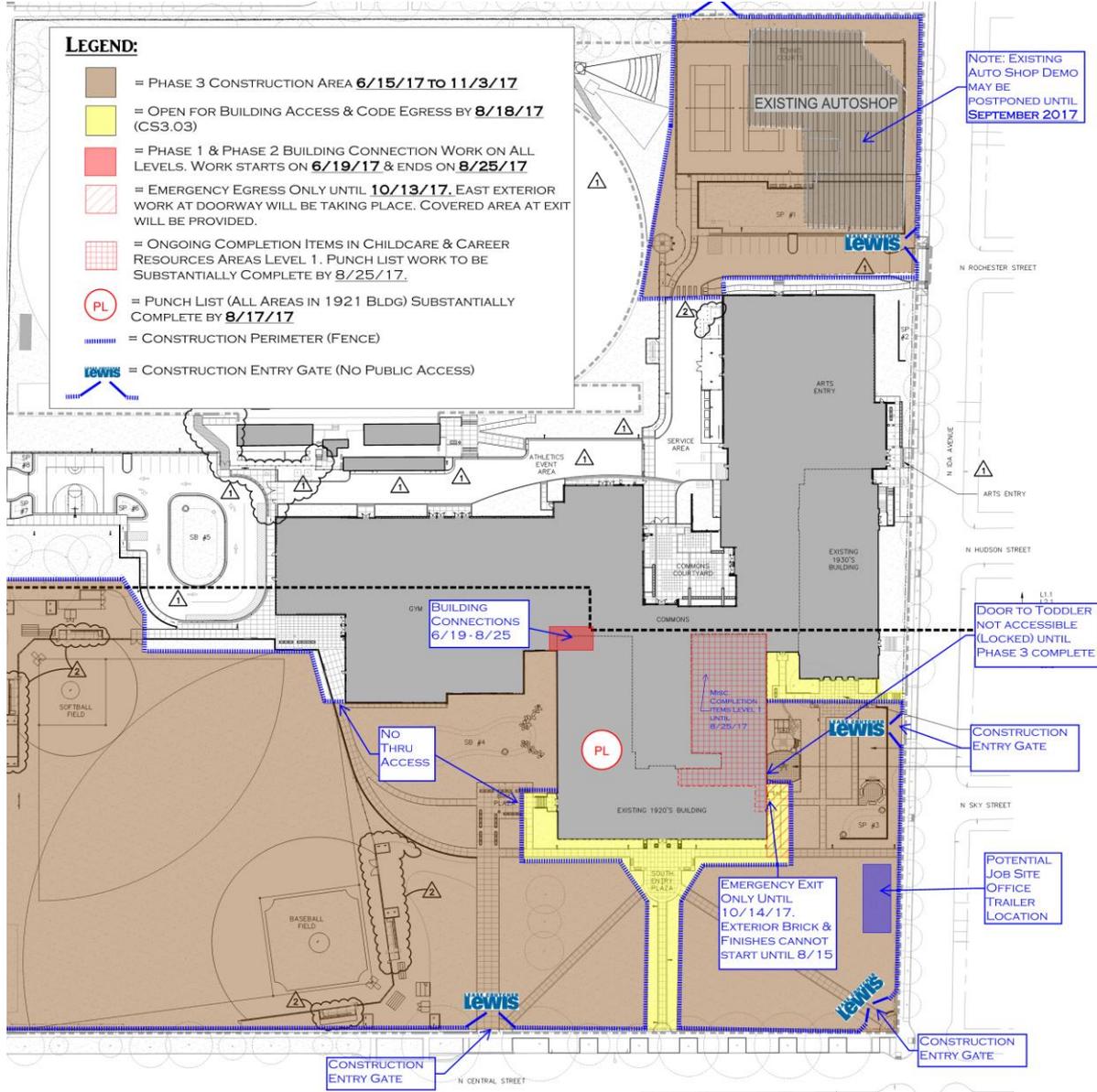


**West Wing 2<sup>nd</sup> Floor Wall Framing & Rough-In**



**Drywall Underway**

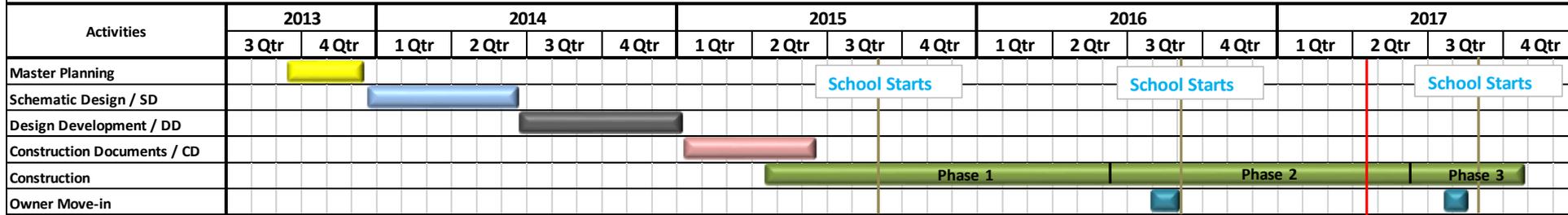
April 2017





## 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*
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	19-Sep-16	84	2-Jul-15	-57	3	29-Oct-16	124	40
P1 - Gym Construction	29-Jun-15	11-Aug-16	6-Jul-15	7	5-Aug-16	-6	19-Aug-15	51	44	29-Oct-16	79	85
P1 - Owner Move In	21-Mar-17	----	1-Aug-16	-232	28-Aug-16	----	1-Aug-16	-232	0	28-Aug-16	----	0
P1B - Performing Arts / Commons	10-Aug-15	12-Aug-16	28-Sep-15	49	14-Dec-16	124	28-Sep-15	----	0	3-Jan-17	----	20
P1B - Owner Move In	----	----	31-Oct-16	----	30-Dec-16	----	12-Dec-16	----	42	3-Jan-17	----	4
P2 - 1921 Building Construction	7-Sep-16	17-Aug-17	10-Jun-16	-89	2-Aug-17	-15	10-Jun-16	-89	0			
P2 - Owner Move In	----	23-Aug-17	28-Jul-17	----	10-Aug-17	-13						
P3 - Sitework Construction	13-Jun-17	2-Nov-17	9-Jun-17	-4	27-Oct-17	-6						

**Changed Schedule Dates**  
Activity has reached some or all completion dates

\* Calendar Days

Construction Status	
Percent Complete Planned:	<b>88%</b>
Percent Complete Actual:	<b>87%</b>
Percent Construction Time Used:	<b>77%</b>



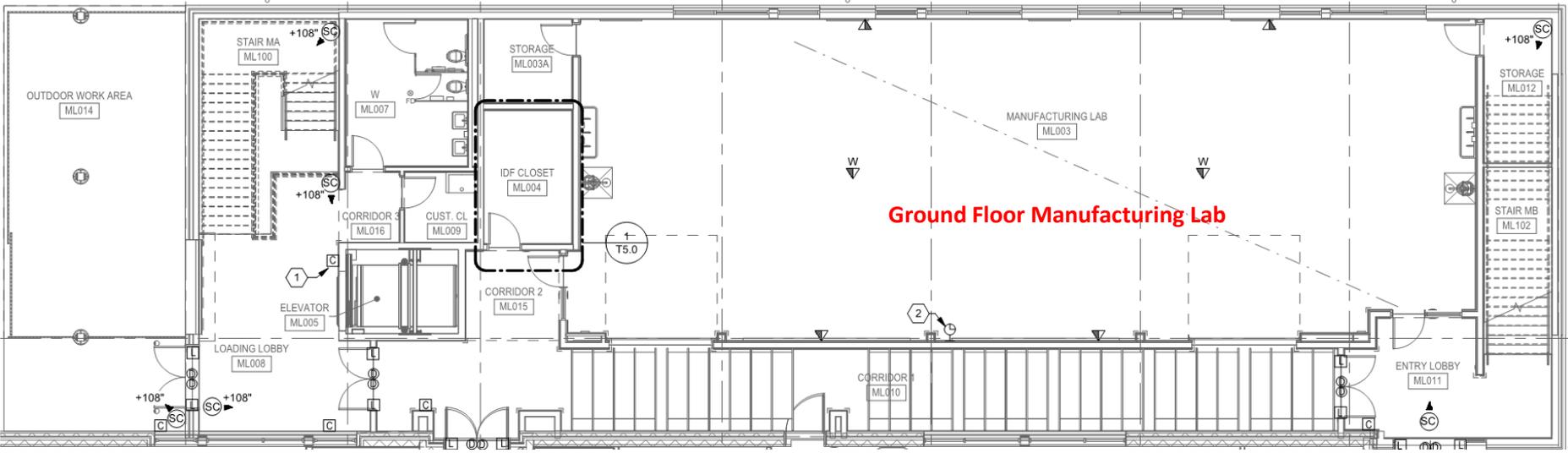
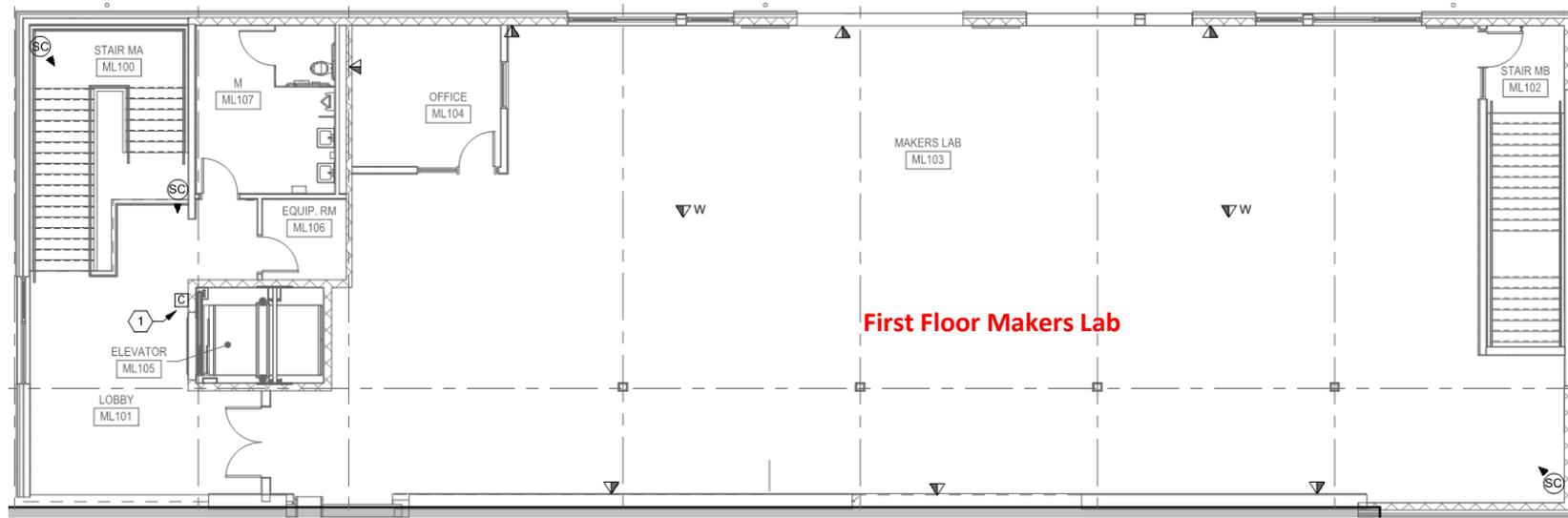
Contingency Update

## Assessment of Changes over \$100k

Category of Change	\$m
GMP Buyout	\$4.98
Significant Unforeseen	\$2.33
Temporary Facilities	\$0.88
<b>Total</b>	<b>\$8.19</b>



## Additional Maker Space - Phase IV





## 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:** Construction Documents

**Construction Start:** Summer of 2017

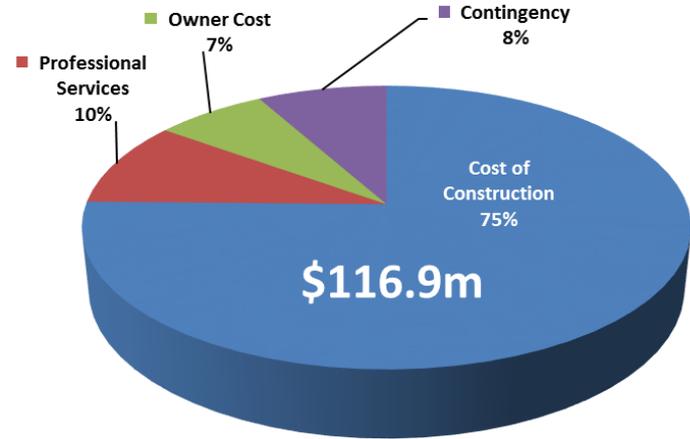
**Construction Duration:** 21.4 Months

**Scheduled Completion:** Summer of 2019

**Design Firm:** Mahlum

**Contractor:** Anderson - Colas

## Projected Budget Breakout



## Comments

1. The demo permit drawings were submitted to the city on 3/21/17.
2. SRGP application was sent out for two building 1923 Gym and 1928 Auditorium to potentially receive 3M for the project.
3. Enrolled in the Facilities Permit Program (FPP) for the Marshall TI.
4. Project Team met with PBOT on 3/17/17 to discuss the required off-site improvements. Discussed minimizing the sidewalk improvements because of potential damage to the street light power runs directly under the sidewalk.

## Photos



Design Rendering



## Schedule

### Summary Schedule

Activities	2015				2016				2017				2018				2019		
	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	1 Qtr	2 Qtr	3 Qtr
Master Planning																			
Schematic Design / SD																			
Design Development / DD																			
Construction Documents / CD																			
Construction																			
Owner Move-in																			

### Significant Schedule Milestone Assessment

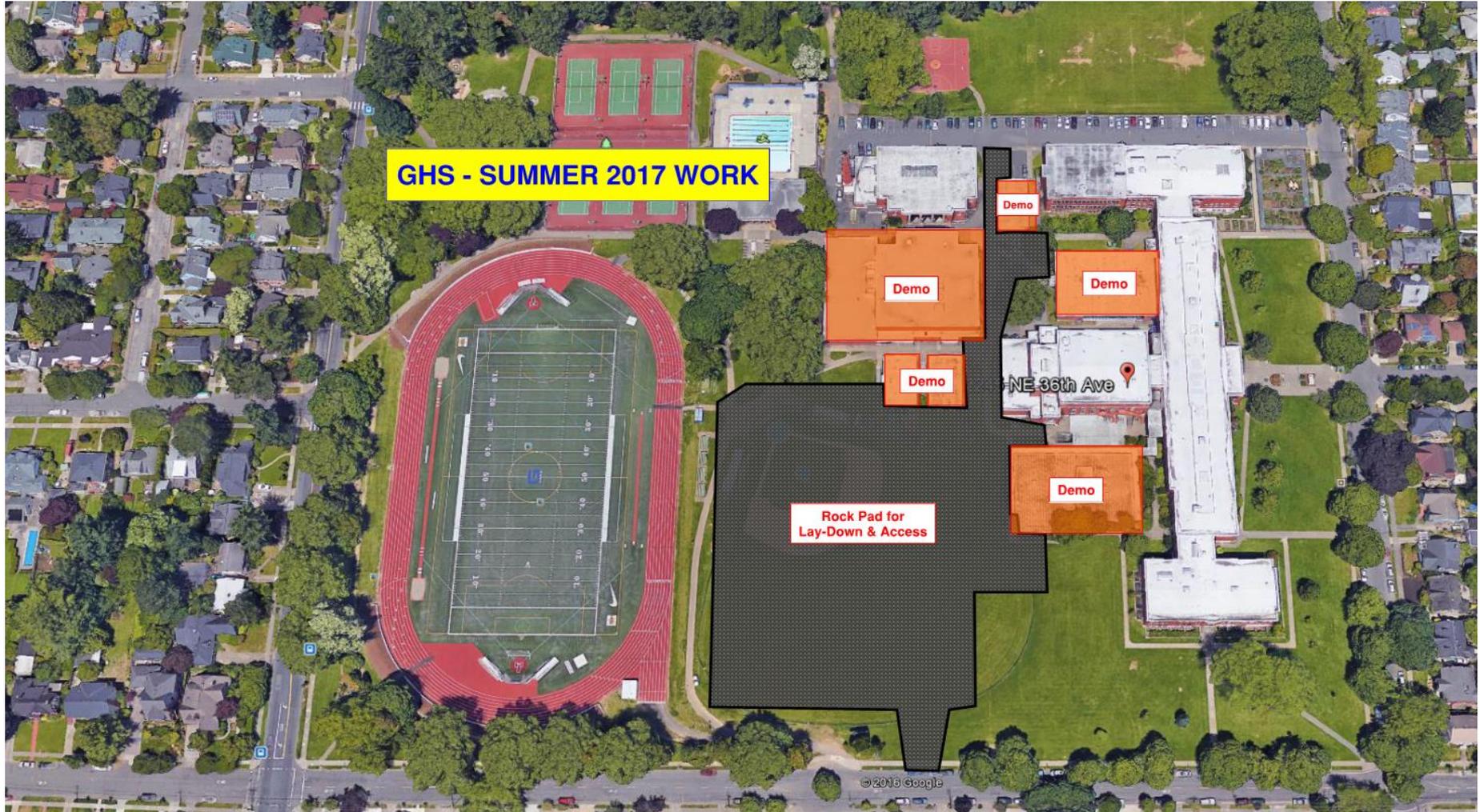
Significant Milestone Activity Name	Project Director Baseline (PDB)		Schedule Update				Actual					
	Start	Finish	Start	Start Delta from PDB*	Finish	Finish Delta from PDB*	Start	Start Delta from PDB*	Start Delta from Update*	Finish	Finish Delta from PDB*	Finish Delta from Update*
Prepare, Release Design 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	20-May-16	46	0
Request Proposals by CM/GC	6-Nov-15	14-Dec-15	16-Feb-16	102	30-Mar-16	107	3-Mar-16	118	16	6-Apr-16	114	7
CM/GC Notice To Proceed (Precon)	4-Feb-16	4-Feb-16	3-May-16	89	3-May-16	89	26-May-16	112	23	26-May-16	112	23
Design Development	5-May-16	10-Sep-16	20-May-16	15	7-Dec-16	88	21-May-16	16	1	7-Dec-16	88	0
Permit 1	11-Mar-17	----	17-Mar-17	6	27-Jun-17	----	22-Mar-17	11	5			
Permit 2	----	9-Jun-17	28-Jun-17	----	20-Oct-17	133						
50% CD	11-Sep-16	----	23-Dec-16	103	18-May-17	----	7-Dec-16	87	-16			
Sign GMP on 50%CD	7-Oct-16	7-Oct-16	11-Jul-17	277	9-Aug-17	306						
100% CD	----	1-May-17	19-May-17	----	8-Sep-17	130						
Building Permit 3	11-Mar-17	9-Jun-17	20-Oct-17	223	16-Feb-18	252						
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	20-Mar-19	0	20-Mar-19	0						
Owner Move In	2-May-19	20-Jun-19	23-Apr-19	-9	20-Jun-19	0						

Changed Schedule Dates

Activity has reached some or all completion dates

\* Calendar Days

Master Plan	2.8 months
Activity Durations	
SDs	5.2 months
DDs	6.7 months
CDs	9.2 months
Total Design	21.0 months
Construction	21.4 months





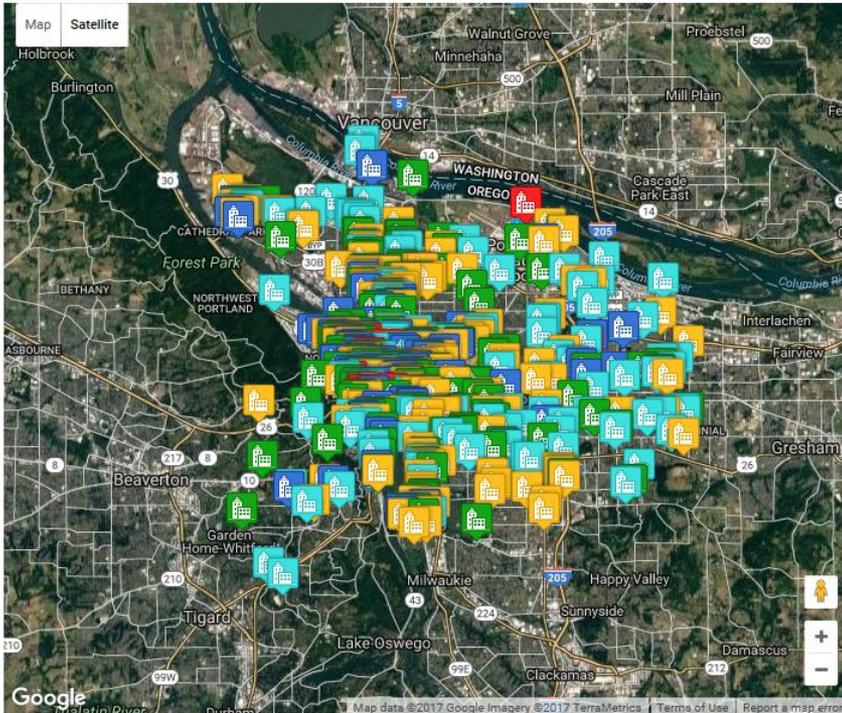
## Budget Impacts

### DEVELOPMENT MAP

Posted on April 28, 2015 by nextportland

Filter by

- All
- Announced
- Completed
- Design / Land Use Review
- Early Assistance
- Inactive
- Permit Review
- Under Construction



- Announced
- Design / Land Use Review
- Permit Review
- Under Construction
- Completed
- Inactive

April 2017

**DJC Oregon**  
Oregon's Building Connections  
145 | 10/2-2017

**29** new construction building opportunities **PAW T**      **37** new public notices and calls for bids **PAW B**

**THE PROBLEM WITH 'A GOOD PROBLEM TO HAVE'**  
Construction work may be abundant these days, but subcontractors are seeing prices creep upward.

**"I'm turning away a ton of work. This is the first time in my career that I've had the opportunity to say no to so many projects."**

— JIM TAYLOR  
*(Project Manager for Construction Services general contractor)*

**DEVELOPMENT**  
EARLY ASSISTANCE BRING LIGHT FOR AFFORDABLE HOUSING IN BELLMOND

**DEVELOPMENT**  
PORT OF KALAMA HAS BIG PLANS

**CONSTRUCTION JOB**  
A NEW RULE ON PRIVACY FOR FEDERAL CONTRACTORS

**DJC PROJECT CENTER**  
SEARCH, FIND, BID.  
Contact: [Search-Find-Bid](mailto:Search-Find-Bid) and for a FREE local status: [status\\_invest@djcor.com](mailto:status_invest@djcor.com) 503.802.7252

CLASSIFIED 8 // CALL FOR BIDS 9-12 // CONSTRUCTION 7 // PUBLIC NOTICES 12-15



## 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:** 1<sup>st</sup> Qtr 2015

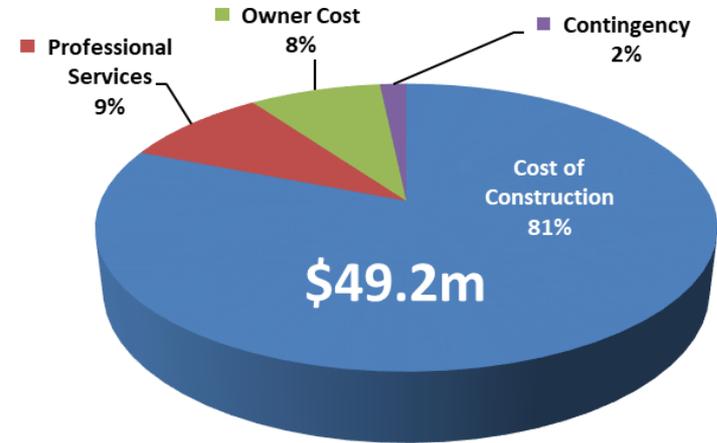
**Construction Duration:** 17.5 Months

**Scheduled Completion:** Summer of 2017

**Design Firm:** BORA

**Contractor:** Todd Construction

## Projected Budget Breakout



## Comments

- Todd has revised their recovery schedule based on actual work completed.**
- The PPS furniture order has been submitted to the vendor.**
- PBOT permit is issued.**
- SAFETY:**
  - Recordable Accidents: 0**
  - Reportable Accidents: 0**

## Photos



Main Entrance View



## April 3, 2017





**Welcome Hall – 2<sup>nd</sup> Floor Glass Rail Being Installed**



**Sector B – 3<sup>rd</sup> Floor Glazing Installation**

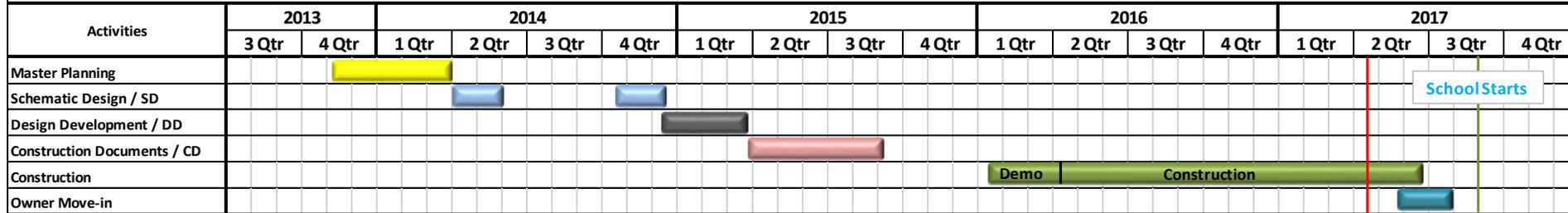


**Kitchen Roof – Solar PV Hot Water Panels Installed**

April 2017

## Schedule

### Summary 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
Land & Building Permits	6-Jan-15	25-Mar-16	27-May-14	-224	19-Feb-16	-35	27-May-14	-224	0	23-Feb-16	-31	4
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
Site Preparation and Demolition	15-Jan-16	22-Mar-16	15-Jan-16	0	22-Mar-16	0	15-Jan-16	0	0	16-Mar-16	-6	-6
Underground, Foundation, SOG	26-Jan-16	6-Jun-16	26-Jan-16	0	21-Jul-16	45	25-Jan-16	-1	-1	7-Jun-16	1	-44
Structure, Roof and Exterior	13-May-16	27-Mar-17	20-May-16	7	7-Jun-17	72	18-Apr-16	-25	-32			
Interior Rough In and Framing	25-Jul-16	9-Dec-16	23-Sep-16	60	19-Apr-17	131	26-Jul-16	1	-59			
Interior Build-out	22-Aug-16	3-Feb-17	14-Nov-16	84	25-May-17	111	29-Sep-16	38	-46			
Area Complete, Ready for Turn Over	20-Dec-16	14-Mar-17	25-May-17	156	9-Jun-17	87						
Substantial Completion	25-Apr-17	25-Apr-17	23-Jun-17	59	23-Jun-17	59						
Owner Move In	8-Jun-17	10-Aug-17	22-May-17	-17	31-Jul-17	-10						

**Changed Schedule Dates**  
Activity has reached some or all dates

\* Calendar Days

Construction Status	
Percent Complete Planned:	<b>90%</b>
Percent Complete Actual:	<b>84%</b>
Percent Construction Time Used:	<b>84%</b>

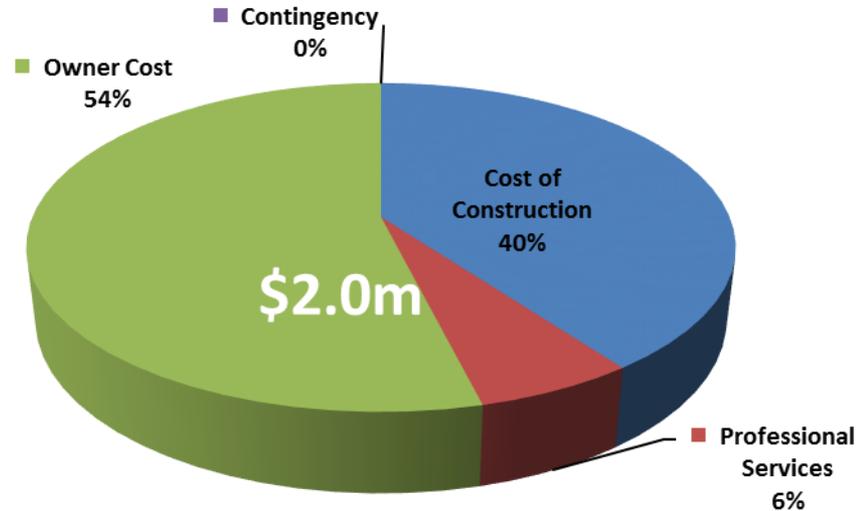


## Project Description

**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.; McDonald + Wetle

## Projected Budget Breakout



## Comments

1. Close out needs to be finalized
2. SAFETY:
  - Recordable Accidents: 0
  - Reportable Accidents: 0

## Photos





### Project Description

**Project Description:** A multiple site project with multiple construction areas  
**Current Project Phase:** Closeout  
**Completion:** 6 May 16  
**Construction Duration:** 65 Calendar Days for Summer Work

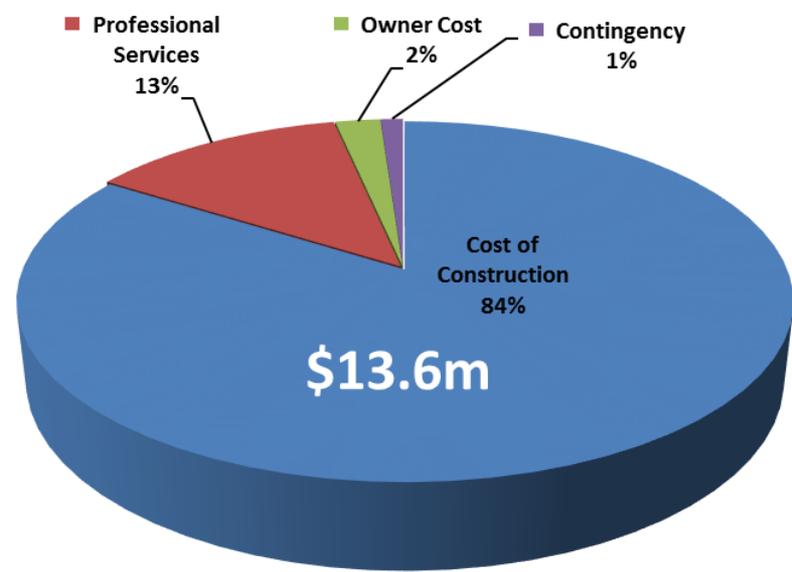
Design Firm	School	Roof Replacement / Seismic Bracing	Seismic Improvements	Accessibility	Science Classrooms Improvements	Construction Package
Oh Planning	Ainsworth (K-5)	X		X*		1
	Woodlawn (PK-8)			X*		
Oh Planning	Hayhurst (K-5)	X			X	2
	Stephenson (K-5)	X				
Oh Planning	Creative Science / Clark (K-8)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

X\* = Includes Elevator

### Comments

- All projects are complete, and the final close-out docs have been received.
- The Project Turn-Over processes in eBuilder have all been submitted, and the "Close" still requires one final clearance.
- SAFETY:**
  - Recordable Accidents: 1
  - Reportable Accidents: 0

### Projected Budget Breakout



### Photos





## Project Description

**Project Description:** A 7 site project with multiple construction areas

**Current Project Phase:** Construction & Close out

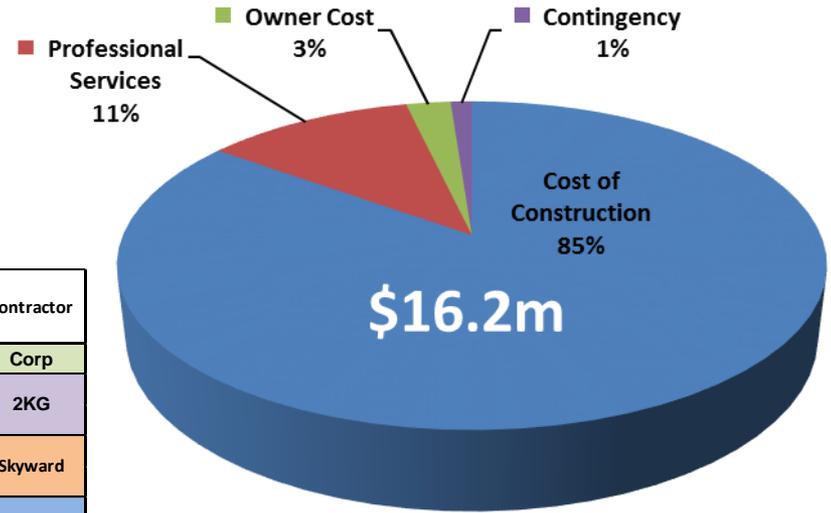
**Scheduled Completion:** August 2016 (Elevators Dec 2017)

**Construction Duration:** 72 Calendar Days for Summer Work

**Design Firm:** Oh Planning & BBL

**Contractor:** Corp, 2KG, Skyward

## Projected Budget Breakout



Design Firm	School	Roof Replacement / Seismic Bracing	Seismic Improvements	Accessibility	Science Classrooms Improvements	Windows	Contractor
OHPD	Cleveland (9-12)	X		X			Corp
OHPD	Cesar Chavez (K-8)			X*	X		2KG
OHPD	Scott (K-8)			X*	X		
BBL	MLC (K-12)		X	X	X		Skyward
BBL	Sellwood (6-8)	X			X		
BBL	Abernethy (K-5)	X	X				2KG
BBL	Jefferson (9-12)		X	X			

## Comments

1. Elevator work at Scott to be complete in May 2017.
2. Elevator work at Chavez to be complete in December 2017.
3. SAFETY:
  - Recordable Accidents: 0
  - Reportable Accidents: 0

## Photos



New Elevator at Scott



## Schedule

### Summary Schedule

Activities	2016												2017												
	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	[Blue bar]																								
Construction Bidding			[Purple bar]																						
Construction and Move in	[Green bar]																								

### 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	8-Jan-16	75	44
Construction Documents / CD	26-Oct-15	18-Jan-16	15-Nov-15	20	16-Feb-16	29	9-Jan-16	75	55	17-Mar-16	59	30
Permit submittal and review	30-Jan-16	29-May-16	17-Feb-16	18	31-May-16	2	14-Mar-16	44	26	15-Jun-16	17	15
Request GC ITBs	1-Feb-16	21-Feb-16	15-Mar-16	43	27-Apr-16	66	9-Mar-16	37	-6	27-Apr-16	66	0
Review GC ITBs	22-Feb-16	11-Mar-16	12-Apr-16	50	28-Apr-16	48	6-Apr-16	44	-6	19-May-16	69	21
GC Notice To Proceed	25-Mar-16	25-Mar-16	4-May-16	40	1-Jun-16	68	19-May-16	55	15	19-May-16	55	-13
Substantial Completion	25-Aug-16	25-Aug-16	20-Aug-16	-5	20-Aug-16	-5	19-Aug-16	-6	-1	19-Aug-16	-6	-1
Elevator Substantial Completion	30-Apr-17	30-Apr-17	31-May-17	31	22-Dec-17	236						

Changed Schedule Dates

Activity has reached some or all completion dates

April 2017

\* Calendar Days



## Project Description

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

**Current Project Phase:** Construction Documents

**Scheduled Completion:** August 2017

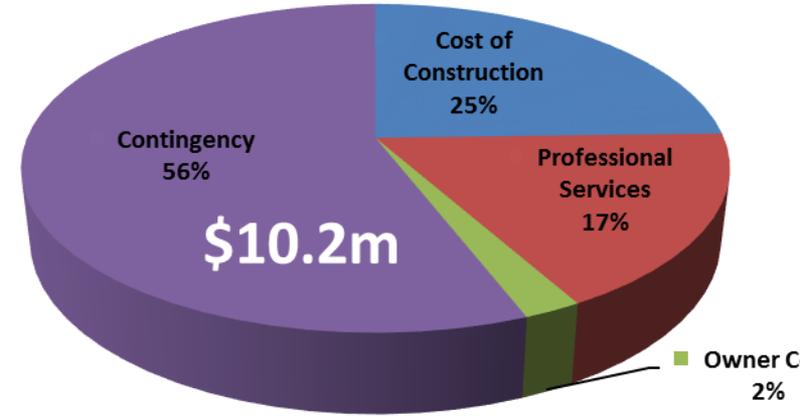
**Construction Duration:** 73 Calendar Days for Summer Work

**Design Firm:** Oh Planning & Design

**Contractor:** TBD

Design Firm	School	Science Classrooms Improvements	Roof Fall Protection	SRGP Funded Upgrades	Window Restoration	Bid Package
Oh Planning	Beaumont (6-8)	X				1
Oh Planning	Fernwood – Beverly Cleary (2-8)	X				
Oh Planning	Jackson (6-8)	X				
Oh Planning	Sunnyside (K-8)	X				
Oh Planning	Vestal (K-8)	X				
Oh Planning	Winterhaven (K-8)	X				
Oh Planning	Lewis (K-5)			X		2

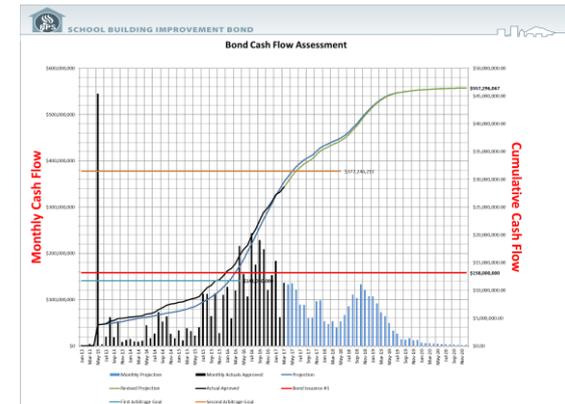
## Projected Budget Breakout



## Comments

1. Designs for the above listed schools are at 100% CDs.
2. Construction for the completed designs is deferred to a decision at a later date.

## Photos

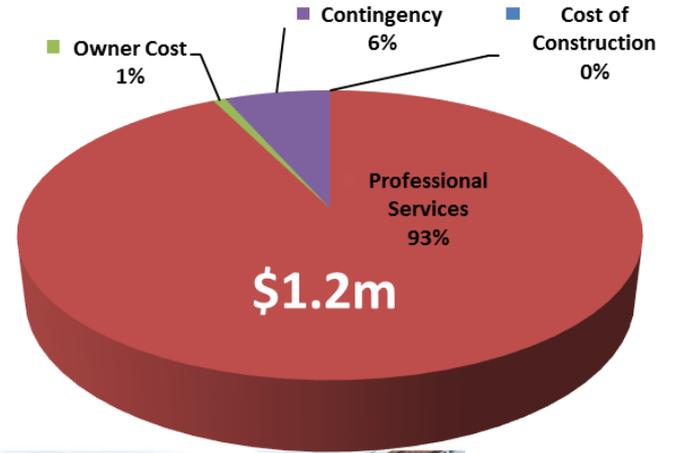




### Project Description

**Project Description:** Master Planning for three campuses  
**Current Project Phase:** Closeout  
**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

Benson Master Plan  
 Lincoln Master Plan  
 Madison Master Plan



April 2017

### Photos





#	Abbreviated Recommendation	Response	Status
1	OSM should ensure that change order work occur only upon appropriately authorized change order execution	Concur	Complete
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	★ Complete
14	Update the SOP to provide more detailed and accurate information with respect to the alternative contracting	Concur	★ Complete
15	OSM should clarify which projects require the use of 1.5 percent for green technology	Complete	Complete
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	Complete
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 96% Complete – Last Report 88% Complete**



#	Abbreviated Recommendation	Response	Status
1	OSM should ensure that all monthly project budget projections are updated on a timely basis and include rough order of magnitude (ROM) estimates of potential changes	Concur	Complete
2a	OSM should ensure that future CM/GC contracts have provisions that require proactive participation of the CM/GC with the architect	Nonconcur	Complete
2b	Ensure that the GMPs for future CM/GC projects are negotiated and executed at the contractually proscribed point in design	Concur with comment	Complete
3	Ensure that all future GMP amendments are consistent with the letter and intent of applicable law and policy	Completed	Complete
4	Consider increases to general conditions work for additive changes to the GMP only when time is extended	Nonconcur	Complete
5a	Provide a workable format in e-B for processing CM/CG contract changes in a timely fashion	Completed	Complete
5b	Ensure that change orders and draw-downs for CM/GC projects receive appropriate approvals	Completed	Complete
6	P&C and OSM should investigate ways to provide more complete information to help the selection committees	Completed	Complete
7	OSM should make by the completion of schematic design: value engineering reductions, scope reductions, increase the project budget	Completed	Complete
8a	OSM should modify the SOPs to provide specific targets or ranges for project contingency at key stages of design	Nonconcur	Complete
8b	The SOP should provide greater specificity on how the program will provide project budget oversight	Nonconcur	Complete
8c	OSM program management should ensure the development of comprehensive and detailed PTMP templates for projects	Concur with comment	Complete
8d	OSM program management should hold project management staff accountable for producing comprehensive and functional PTMPs	Concur with comment	Complete
8e	Written lessons learned should be developed and updated regularly from information obtained from the FHS, RHS and GHS projects	Completed	Complete
9	SOP should be updated to provide greater clarity and specific guidelines for line item budgeting for master planning	Nonconcur	Complete
10a	OSM should assess the factors that have contributed to a pattern of IP projects bidding over budget and continue to explore ways to develop designs that bid within budget	Completed	Complete
10b	OSM should start design of IP projects earlier and issue invitations to bid earlier	Completed	Complete
10c	OSM should consider adding in the bid specification, minimum qualifications requirements for designated systems	Concur	Working
11a	OSM should ensure that the program is subject to greater oversight by district program management	Completed	Complete
11b	OSM management should ensure that the OSM Project Management Plan and Standard Operating Procedures are complete and updated on a regular basis	Concur with comment	Working
12	OSM should re-evaluate the effectiveness of using the CM/GC alternative procurement methodology with current OSM staffing, and consider other procurement methodologies (ie design-bid-build) as well as CM/GC for future modernization projects	Completed	Complete
13	OSM and P&C should procure the services of future CM/GC firm by the beginning or mid-point of schematic design	Completed	Complete
14	Begin the process of procurement of firms to develop Ed Specs revisions and master plans with sufficient additional time or float to accommodate for delays and, protests	Completed	Complete
15	To provide more flexibility in the selection of subcontractors, PPS CM/GC contracts should proscribe dollar limits up to which the CM/GC firms may procure subcontractors by competitive quotes, with the prior approval of the district	Completed	Complete

**This Report 92% Complete – Last Report 88% Complete**



## Report Processing Schedule - 2017 Performance Audit

March 14 to April 13	Write, review, and quality control
April 14 to April 19	Initial report formatting by Ellen Jean (CURRENT)
April 19 to April 21	Final review and prepare Working Draft
April 25	Send Working Draft to OSM
May 9	Discuss Working Draft with OSM – in-person or by telephone
May 17	Send Final Draft to OSM
May 31	Receive formal written response from Superintendent
June 5	Send Final Report to PPS
June 6-9	OSM reviews with BAC
June 12	BAC written comment
June 13	OSM submits on BOE agenda
June 20	Present report to BOE



## BAC Discussion

### Next Board Presentation

TBD

### Next BAC Meeting

Wednesday, July 19

Place: ??