



West Linn – Wilsonville Schools

**Long Range Planning & Bond Oversight Committee Meeting
West Linn High School
Wednesday, October 19, 2022 6:00 PM**

Bond Oversight Committee Meeting

1. Call to Order 6:05 PM

2. Roll Call	Mary Pettenger	Kirsten Wyatt, Board Liaison
	Ramiro Diaz	Kathy Ludwig, Superintendent
	Alina Eglund	Pat McGough, Chief Operations Officer
	Kim Jordan	Remo Douglas, Bond Program Manager
	Amy Paterson Sandie	Amy Berger, Bond Coordinator
	Marina Cresswell	Ellen Leventhal, Bond Accountant
	Parasa Chanramy	

3. Tour of West Linn High School Stadium Project (The group toured ahead of reviewing the quarterly report)
- The committee viewed the new stadium, bus lane, pathways and parking lot at West Linn High School.
 - The storm water work was noted as a significant and unexpected part of the stadium upgrade. Trenches were dug under the bus lanes to prevent water run-off from encroaching the school building. Existing water was pumped out from the bedrock under the building in order to bring the site up to code.
 - The pathway to the stadium was widened to accommodate more people and is ADA compliant.
 - Additional stadium seating was added and can now accommodate the entire school student population. The overhang was extended, seamlessly connecting with the existing structure, providing coverage for the entire seating area.
 - Bathrooms have been upgraded and are now fully enclosed with both traditional and single user facilities.
 - The stadium lights now use energy efficient LED lighting and control the light much better than the previous system.
 - The new parking area by the stadium provides an additional 98 parking spots and provides storm water detention, located under the lot.
 - It was noted that there were 5,000 attendees at a recent football game, with viewing available from multiple locations in the new stadium area.

4. Quarterly Report: The 3rd Quarter 2022 Report:

- a. The overall program summary shows \$18 million has been spent this quarter, for a total of \$105.5 million paid as of October 17, 2022. Additionally, \$174.4 million has been committed in contracts, over 77 % of the current budget.
- b. It is a good sign that strong spending continued this quarter, on track to fulfill the required 85% spending within 36 months of receipt of bond funds. The final major contract will be the new primary school construction, with bidding next spring.
- c. The budget picture shows an \$11.5 million overage at the end of quarter three. The overage was reduced by \$4 million from the previous quarter of \$15.6 million, accounting for the second estimate for the new primary school and savings elsewhere in the program. The Bond Management Team continues to work on areas to reduce this overage and are managing to find additional margins. However, without big moves, the overage will not reach zero.
- d. Aside from the new primary school project, the remainder of the program is approaching a balanced budget. Estimates for upcoming projects, including the new primary school, are subject to recent price swings due to the current economic climate, global events, supply-chain issues and labor shortages which are all contributing to increased costs. The latest report from RLB (a major construction estimating company) indicates these economic hurdles and uncertainties will continue for the foreseeable future.
- e. The sale of remaining unsold bonds is on track for December 2022, in line with the original schedule. A premium is not guaranteed in the current economic climate. The financial summary does not reflect receipt of a premium.
- f. A member asked if part of budgeting includes City of West Linn reimbursement. It is very common that a developer builds the whole street next to a project; some of which is the developer's responsibility and the rest is the City's. The City then reimburses the developer for their portion. So while initial budgeting did not contemplate the district paying for additional street work, the district was never at risk of financial responsibility for the City's portion. If the City had not executed the related IGA, the work would have been deducted from the contractor's contract. Now that the related IGA has been executed, the quarterly report does contemplate the reimbursement for street work requested by the City of West Linn.
- g. A member asked about what would happen if the district comes in at \$11 million over budget. At that point the district would take steps such as postponing certain projects not related to emergencies or in danger of imminent failure, review all projects with a fine tooth comb, and make procurement choices. It would be a Board decision on how to proceed if the bond is ultimately underfunded. The district is working to get the best possible outcome and the cost management strategies employed thus far are working. Due to COVID-19 and world events, costs have risen dramatically, even since last December.

5. Wilsonville High School Auditorium Project
 - a. The project is making steady progress.
 - b. Negotiations with contractors with change orders continues.
6. New Athey Creek Middle School in West Linn (Dollar St.)
 - a. Many of the exterior walls will be precast structural concrete panels. Their installation is scheduled to begin in the next few weeks. The precast structural concrete panels (sandwich panels) were built off-site while the earth moving processes were happening on-site. These earthquake-resistant walls include exterior finishes and insulation.
7. New Riverside HS/existing Athey Creek MS
 - a. The first phases of the project were completed for the start of school.
 - b. Design for the next phase is going well and is expected to go out to bid late this fall with construction happening summer 2023.
8. New Primary School at Frog Pond
 - a. The design is going to the City for land use permits in the next few weeks.
 - b. Great feedback from stakeholders on numerous topics has been received.

Adjourn BOC Meeting: 7:21 PM

Long Range Planning Committee Meeting

1. Planning Future School Sites for Anticipated Residential Growth
 - a. This planning is guided by regional and local plans for development, the most concentrated growth at this time is in the Frog Pond area in Wilsonville.
 - b. The City of Wilsonville Master Plan anticipates up to 1,800 new residential units in areas of the Urban Reserve in Frog Pond East which may be brought into the Urban Growth Boundary in the next five to ten years. Past data from FLO Analytics project those numbers could translate to 435 additional K-5 students, 175 additional grade 6-8 students, and 201 additional grade 9-12 students in our District.
 - c. High schools within the District have capacity to accommodate this projected student yield with the opening of Riverside High School. Middle School capacity can also accommodate the student yield with the full buildout of Meridian Creek in a future bond. Primary Schools, specifically in the Wilsonville area, could exceed available capacity with an anticipated yield of 435 students even with the building of the new primary school in the Frog Pond West development. District planning should look at acquisition of land that can accommodate a new primary school.
2. Request for Recommendations from Committee for Exploring Land Opportunities
 - a. Recent property acquisitions by the District have been passive: property owners have approached the District with offers to sell. A more intentional approach may be needed in addressing future property needs.
 - b. The district is looking to the Long Range Planning Committee to make recommendations regarding acquiring land for future school sites. Recommendations can be; to begin actively looking for land, wait for property owners to approach the district with offers to sell, or delay any acquisitions until a future unspecified date.
 - c. If the committee makes a recommendation to the Board, and they approve, the district would begin engaging professionals who will watch for potential

purchases. It was noted that early property purchases are not unusual and often make good fiscal sense. For instance, the Wilsonville High School property was purchased 30 years before the school was built.

- d. A member asked about what would happen if there was a housing bubble and the price of land drops and housing development doesn't happen. The District could either hold the land in anticipation of future development, or sell the land sometime in the future and funds would go back into the land bank for future purchases. Examples of purchases made with property funds are the properties across from West Linn High School and adjacent to the Administration Building.
- e. Committee members not in attendance will be informed of the request for a recommendation and further discussion will occur in the next LRPC meeting prior to asking for a formal recommendation.

Adjourn: 8:12 PM
Next meeting: January 18, 2023



West Linn – Wilsonville Schools

Long Range Planning-Bond Oversight Committee Meeting
West Linn High School Forum
Wednesday, October 19, 2022 6:00 PM

Agenda

Bond Oversight Committee Meeting

1. **6:00 p.m.** Call to Order
2. **6:00 p.m.** Roll Call
 - Mary Pettenger
 - Marina Cresswell
 - Alina Eglund
 - Ramiro Diaz
 - Parasa Chanramy
 - Kim Jordan
 - Amy Paterson Sandie
 - Kirstin Wyatt, Board Liaison
 - Kathy Ludwig, Superintendent
 - Pat McGough, Chief Operating Officer
 - Remo Douglas, Bond Program Manager
 - Amy Berger, Bond Coordinator
 - Ellen Leventhal, Bond Accountant
3. **6:05 p.m.** Quarter 3 2022 Report by Remo Douglas/Amy Berger
 - a. **6:05 p.m.** Financials
4. **6:35 p.m** Tour WLHS Stadium Project
5. **7:05 p.m.** Adjourn BOC Meeting

Long Range Planning Committee Meeting

1. **7:05 p.m.** Call to Order
2. **7:05 p.m.** Future Land Acquisitions by Pat McGough
3. **7:20 p.m.** Adjourn LRPC Meeting

October 2022



WEST LINN - WILSONVILLE SCHOOL DISTRICT

2019 Capital Bond Program

Quarterly Report

Q3 2022

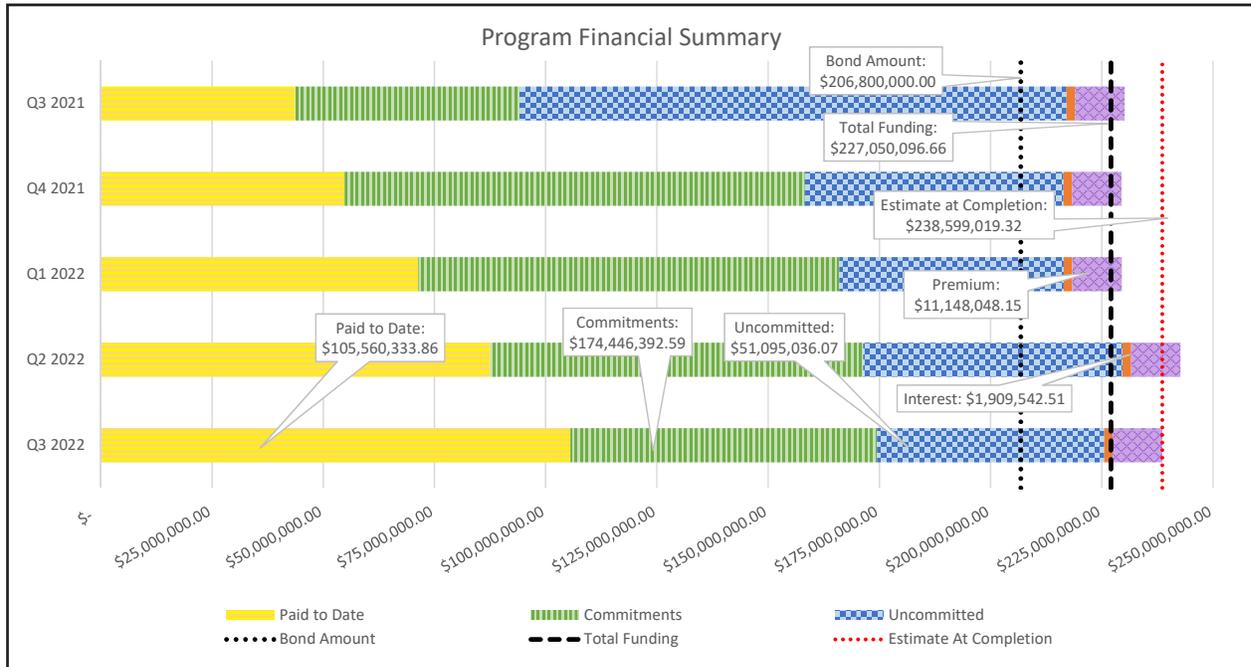
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PROGRAM SUMMARY

Q3 2022



Bond Component	Original Budget	Approved Budget Changes	Current Budget	Current Commitments	Actuals Approved	Estimate At Completion	Forecasted Over/(Under)
Addition & Renovation @ WHS	28,470,000.00	9,273,063.38	37,743,063.38	34,541,648.63	21,303,682.39	37,743,063.38	0.00
New Middle School @ DLR	78,000,000.00	0.00	78,000,000.00	73,667,161.77	28,337,260.13	79,657,363.85	1,657,363.85
Third Option High School	11,673,000.00	2,804,890.00	14,477,890.00	12,615,094.32	11,702,963.30	14,173,320.32	(304,569.68)
Stadium & Parking @ WLHS	8,625,000.00	(499,528.83)	8,125,471.17	8,000,166.25	7,856,842.07	8,033,230.50	(92,240.67)
New Primary School @ FP	39,000,000.00	0.00	39,000,000.00	7,682,779.01	4,182,126.97	50,007,401.33	11,007,401.33
Learning with Technology	15,000,000.00	(750,000.00)	14,250,000.00	10,627,568.25	8,496,363.93	14,250,000.00	0.00
Facility Improvements	26,032,000.00	1,747,616.00	27,779,616.00	20,395,192.38	19,982,643.09	27,060,583.83	(719,032.17)
Subtotals	206,800,000.00	12,576,040.55	219,376,040.55	167,529,610.61	101,861,881.88	230,924,963.21	11,548,922.66
Program	20,139,622.10	(12,465,565.99)	7,674,056.11	6,916,781.98	3,698,451.98	7,674,056.11	0.00
Grand Totals	226,939,622.10	110,474.56	227,050,096.66	174,446,392.59	105,560,333.86	238,599,019.32	11,548,922.66

Community members interested in keeping up with the bond program can sign up for email updates through the District's ListServ system at: <https://listserv.wlww.k12.or.us/self-service/>

- Over 77% of current funding, or \$174.4 million, has been committed
- \$18 million was spent this quarter for a total of \$105.5 million, just above 46.5% of current funding
- The program is on track to fulfill requirement to spend 85% of funds within 36 months of receipt
- The sale of remaining unsold bonds is on track for December 2022, in line with the original schedule
- Current estimates for projects include design and escalation contingencies
- The forecasted over/under for the program was reduced by more than \$4 million dollars but remains over as the current climate impacts construction; cost management work is ongoing
- The Bond Management Team is reviewing the financial impact of ongoing global events on the program budget. Fuel, labor and material cost increases are expected to impact upcoming bids and change orders
- The second estimate for the New Primary School has been received and still exceeds budget, but earlier value engineering was realized in this estimate and the work continues
- Facilities Improvements projects not yet started have been placed on hold
- Financial data current as of October 17, 2022
- Learning with Technology projects are underway, limited supply issues may impact certain improvements but will not impact school operations

PROGRAM MARKETING & PARTICIPATION

Q3 2022

Program Marketing:

The Bond Management Team built a program marketing plan to improve outreach to contractors, including minority and women-owned firms. The goal is to develop an extensive network of industry contacts that are kept informed of current and upcoming opportunities. A variety of platforms both formal and informal are being used to reach out and encourage all contractors that they are welcome, will be treated fairly, and can receive training on district-specific forms and processes.

The projects below represent over \$6.1 million dollars or just shy of 8% of minority-owned, disabled, veteran-owned women-owned or emerging small business contracts between four projects.

Inza Wood Middle School Project

- General Contractor: Inline Construction
- \$903,915 - 18.5% of the contract

New Athey Creek at Dollar Street Project

- General Contractor: Emerick Construction
- \$3.8 Million - 6.2% of the contract

West Linn High School Stadium & Parking Project

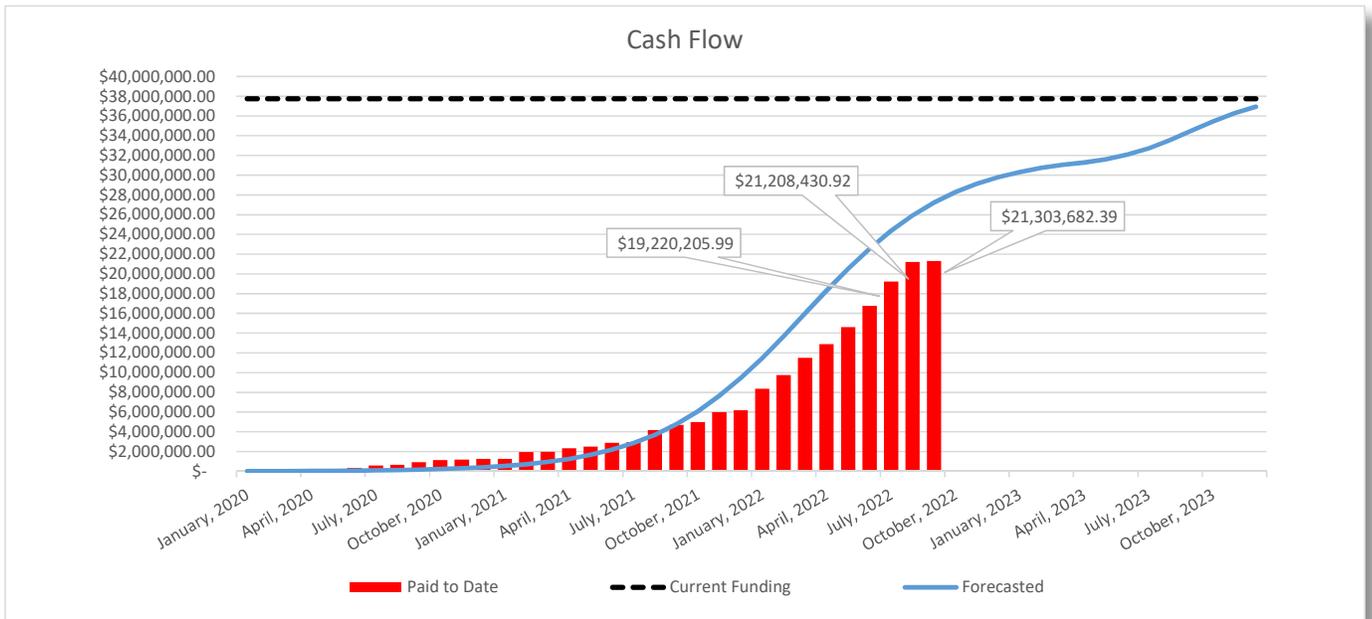
- General Contractor: Par-Tech Construction
- \$1.3 Million - 24.6% of the contract

Riverside High School Project

- General Contractor: Ross Builders
- \$133,323 - 2.1% of the contract

ADDITION & RENOVATION @ WHS

Q3 2022



New 600 seat auditorium with supporting spaces to better accommodate growing school programs and support community performing arts. Also includes additional parking, site circulation improvements, synthetic turf softball field with sports field lights, and energy efficient lighting upgrades. Renovation of existing auditorium and black box theater spaces, conversion to classroom spaces including Career and Technical Education. Also includes safety & security upgrades, energy efficient lighting upgrades and mechanical equipment replacement.

Construction is expected to be phased from summer 2021 through summer 2023. The new auditorium is expected to open early 2023. Renovated spaces are expected to open Fall 2023.

Recent Activities:

- Stair structures are complete
- Mechanical, Electrical and Plumbing rough-in is nearing completion
- Site concrete work is ongoing. North and south plaza work has begun
- New turf for the softball field has been laid and fence post installation is nearing completion
- Front entry work has been completed
- North parking lot is nearing completion
- Security upgrades to the existing buildings have been completed
- Sheetrock installation has begun and roofing work is nearing completion

Upcoming Activities:

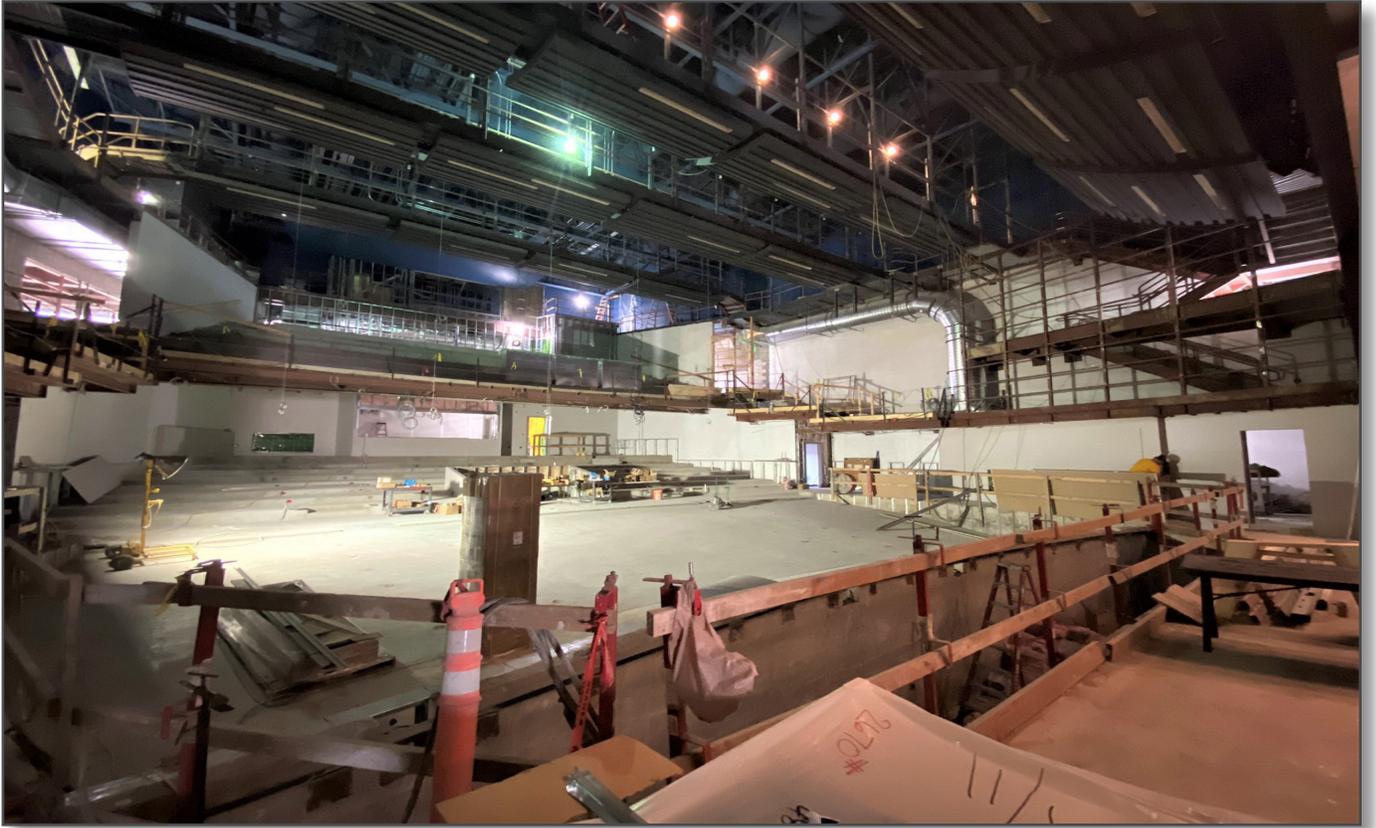
- Window framing work to begin
- AV wiring and device installation
- Lighting and control installation
- Wood architectural panelling installation in the auditorium to begin
- Building exterior metal cladding installation

ADDITION & RENOVATION @ WHS

Q3 2022

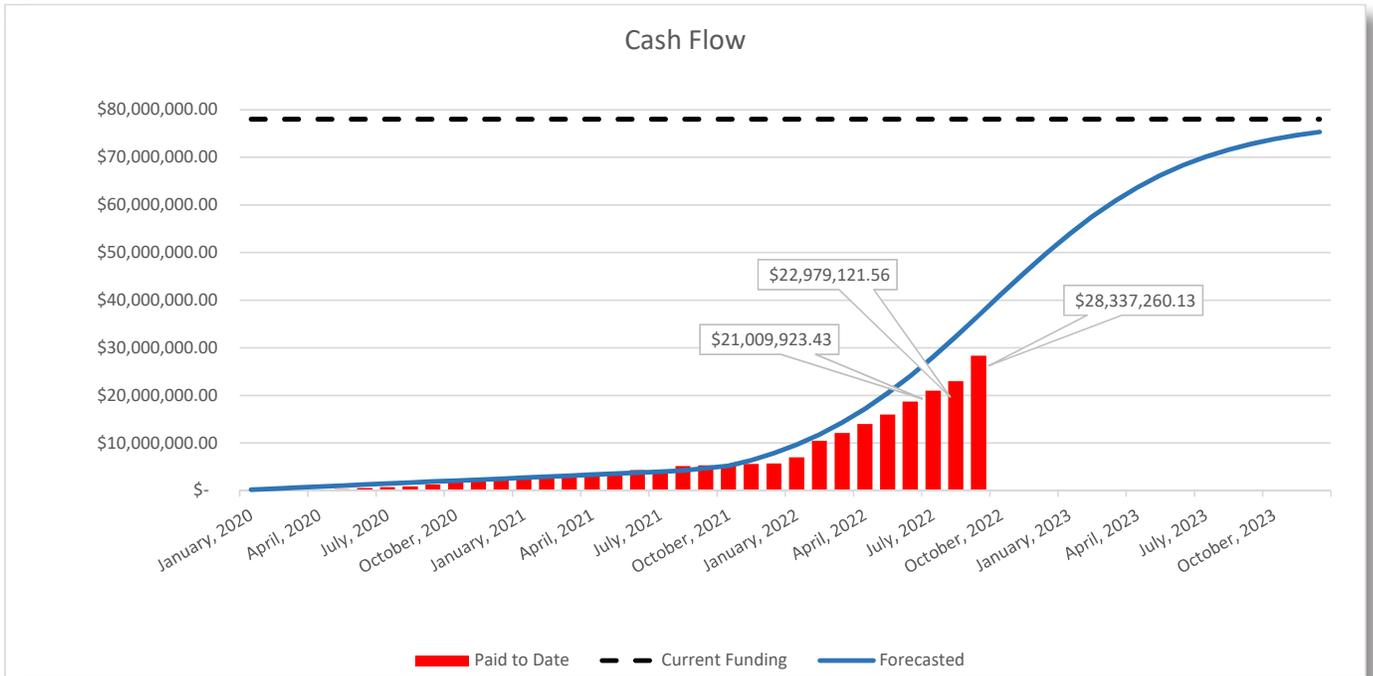


ADDITION & RENOVATION @ WHS
Q3 2022



ATHEY CREEK MIDDLE SCHOOL @ DLR

Q3 2022



New 850 student middle school at the District’s Dollar Street property to make Athey Creek Middle School a neighborhood school, and to provide a central location for Riverside High School.

Construction is expected early 2022 through summer 2023.

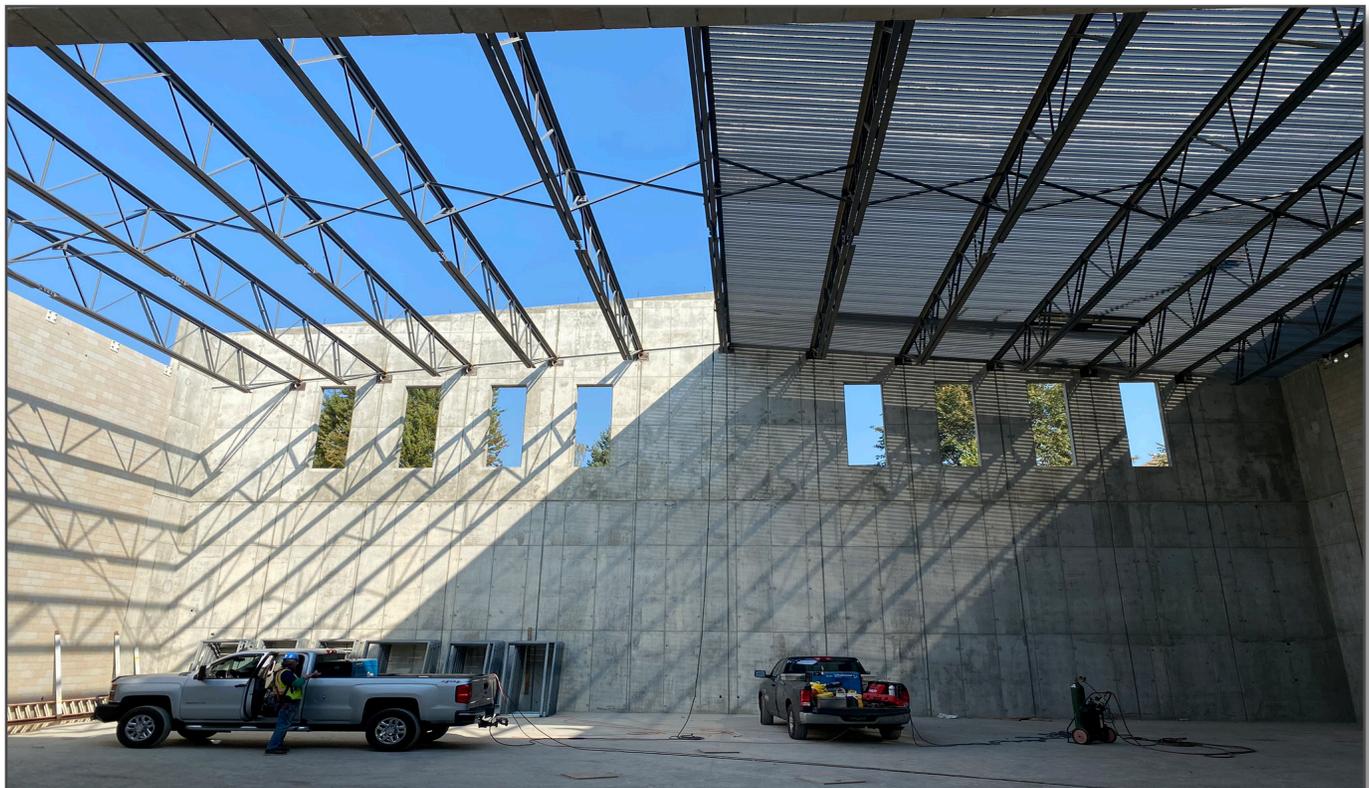
Recent Activities:

- Final grading on the site bus entry, staff parking and track
- All first floor concrete slabs have been poured and block wall installation is continuing
- Steel is on site for portions of the building and is currently being installed. This includes steel beams, trusses and one set of stairs
- The steel decking above the locker rooms, which creates the floor for the auxillary gym, is installed
- The gym walls are complete including the highest, poured in place wall along Dollar Street
- Rough installation of plumbing and electrical work is continuing
- An offsite tour was held to view the fabrication of the precast concrete walls. Delivery and installation of the precast members is expected to start the end of October
- Tree removal along Willamette Falls Drive ocured in July. The remaining work is expected in February
- Work began on Dollar Street with all construction parking moving onto the site
- The water line extension at Dollar Street is complete and the storm line is in process. Curbs are expected to be installed in October

Upcoming Activities:

- Precast concrete wall installation
- Steel erection in the classroom wings
- Temporary roof installation in certain sectors of the building
- Paving on Dollar Street is scheduled for early November while Brandon Place will commence after Dollar Street is complete

ATHEY CREEK MIDDLE SCHOOL @ DLR
Q3 2022

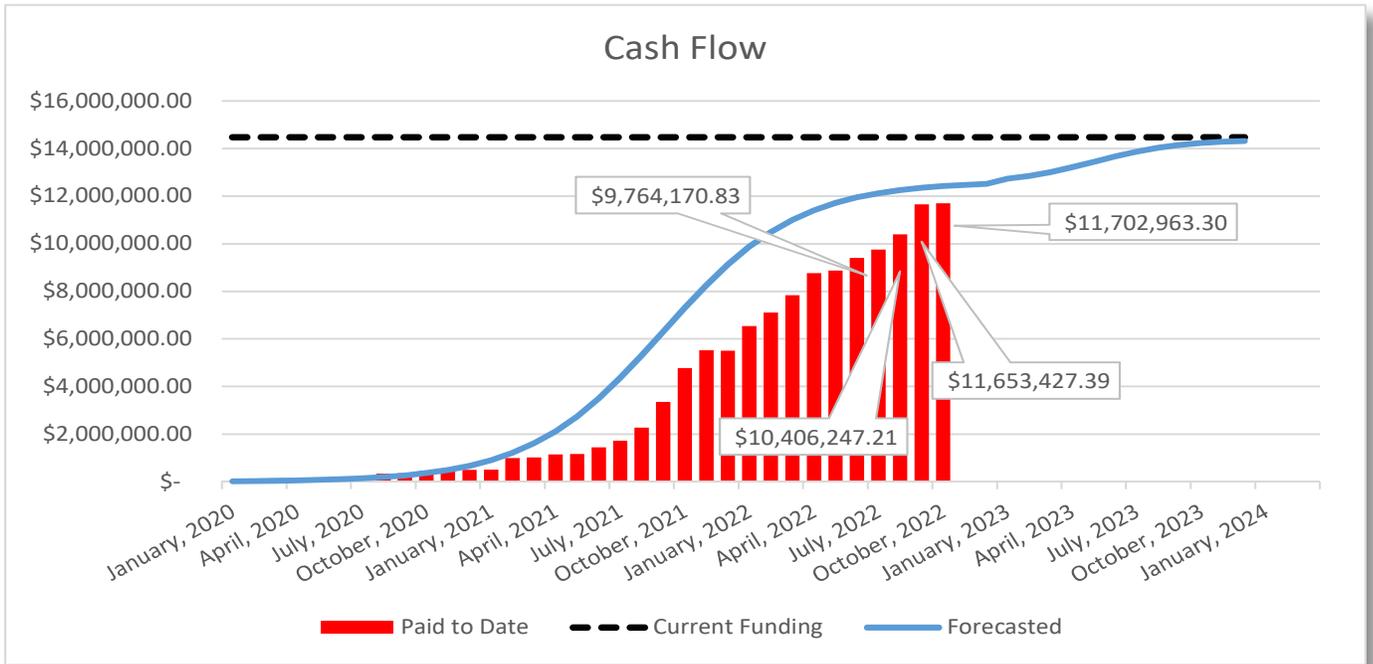


ATHEY CREEK MIDDLE SCHOOL @ DLR
Q3 2022



RIVERSIDE HIGH SCHOOL

Q3 2022



Office addition to accommodate Riverside High School and create a secure entry. Renovation of existing office space, conversion to classroom spaces including Career and Technical Education. Also includes mechanical, electrical and plumbing upgrades, roofing replacement, and kitchen equipment upgrades.

Construction is expected summer 2021 through summer 2023.

Recent Activities:

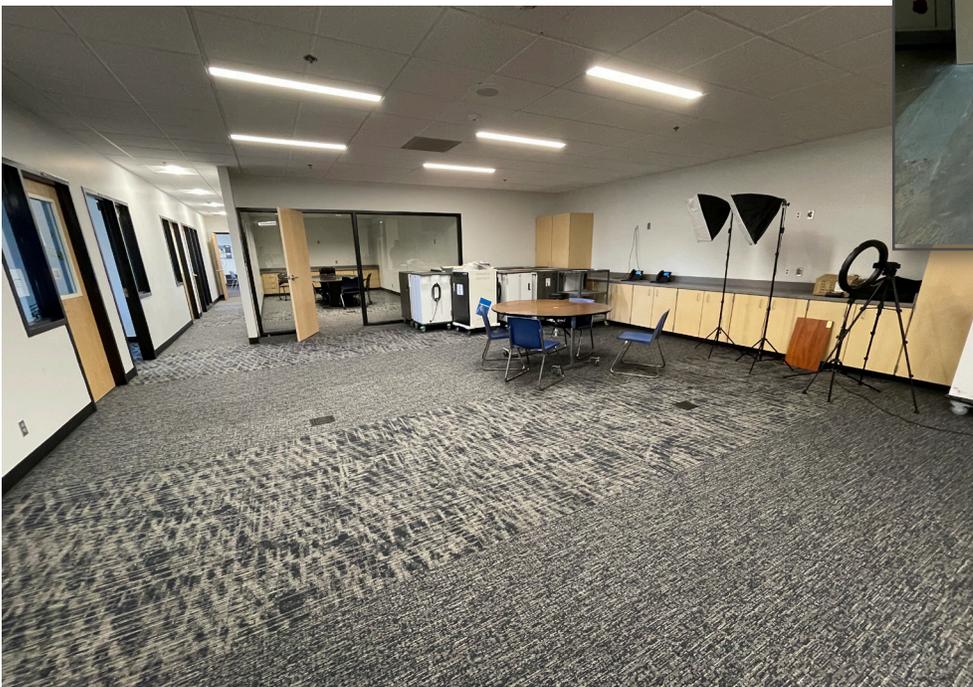
- Existing office space renovation is substantially complete
- Punch list progress
- Design for Summer 2023 phase

Upcoming Activities:

- Complete design for Summer 2023 phase
- Bid Summer 2023 phase
- Order furniture and supplies for Riverside High School

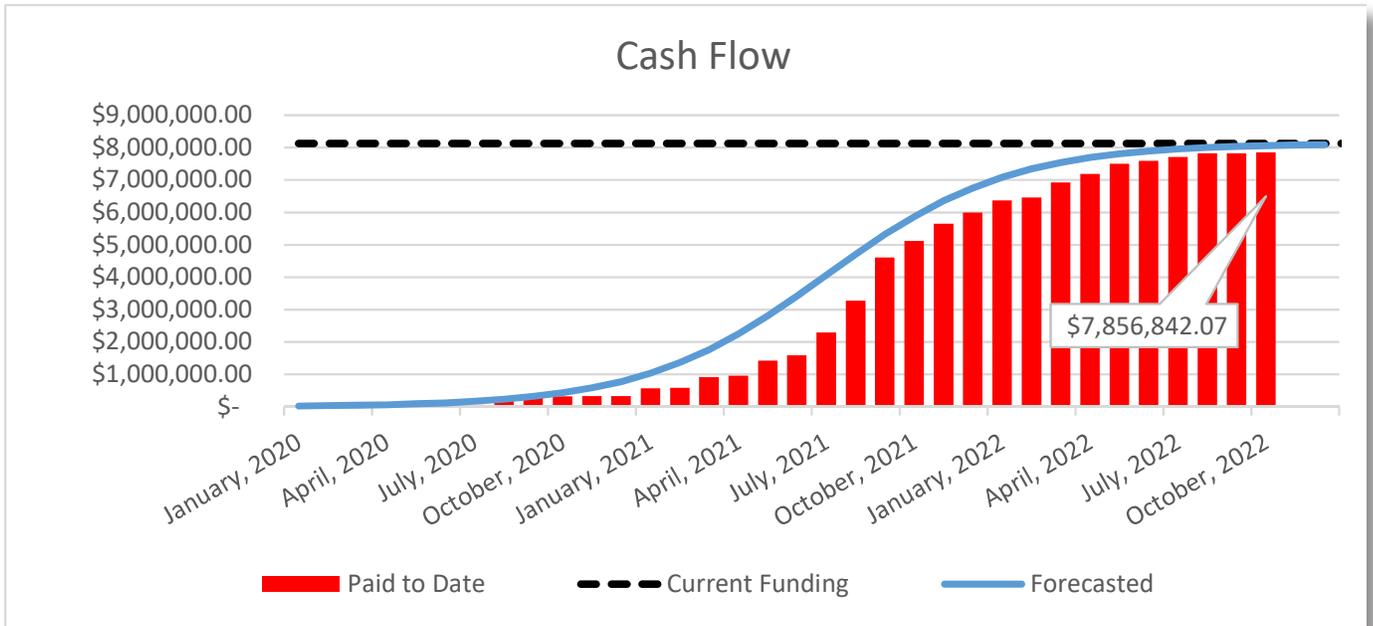
RIVERSIDE HIGH SCHOOL

Q3 2022



STADIUM & PARKING @ WLHS

Q3 2022



Additional stadium seating and parking to better accommodate full student body gatherings as well as spectators already attending athletic events, improving safety and accessibility. Energy efficient sports field lighting upgrade also included.

Construction is substantially complete.

Recent Activities:

- Final occupancy from the City of West Linn was received
- Stadium is open and being used for events
- The new AV system is fully functioning and being utilized for events

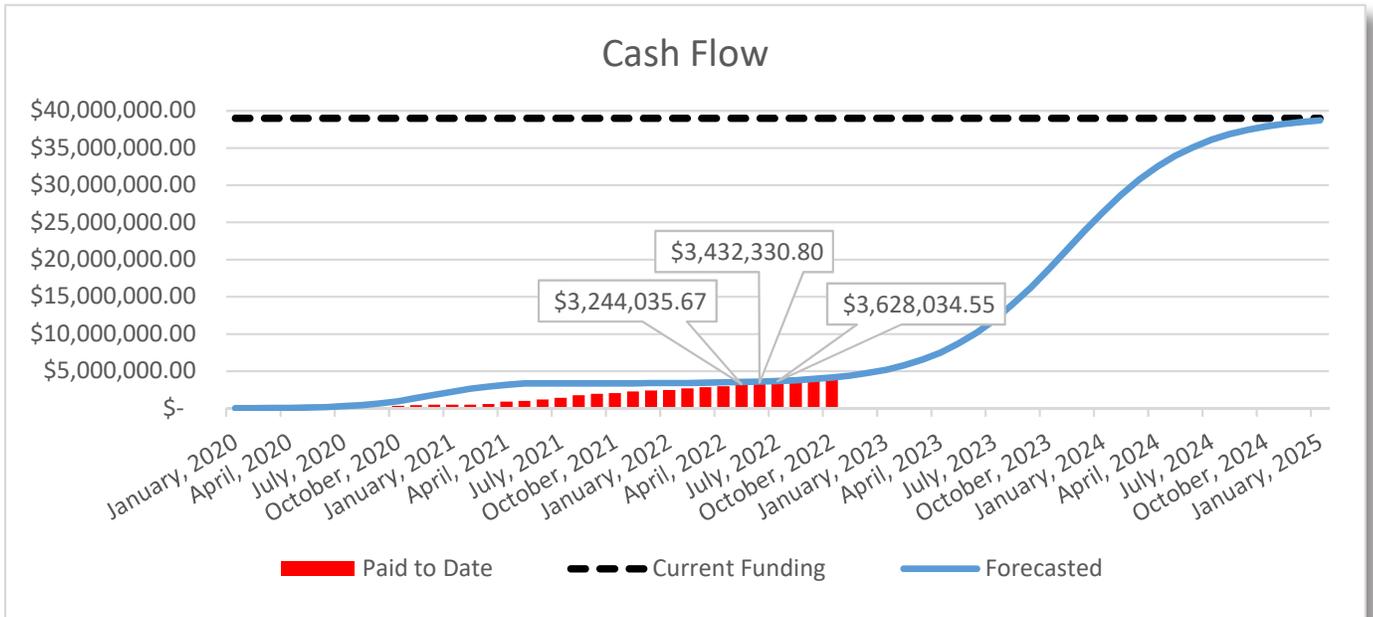
Upcoming Activities:

- Concrete punch list items are expected to be completed during winter break



NEW PRIMARY SCHOOL @ FP

Q3 2022



New 350 student starter primary school on the Frog Pond site to accommodate enrollment growth. New storage building to replace the storage being demolished at the new primary school site.

Construction of the district storage is complete.

Design of the primary school began in 2021.

Construction of the new primary school is expected summer 2023 through summer 2024.

Recent Activities:

- New School Design Development phase completed in early September
- Construction Document Design launched
- Post COVID-19 construction material availability/lead times have been assessed and a mock construction schedule was created to evaluate project timeline feasibility.
- Meetings with district staff, students and parents were held to elicit feedback regarding the design
- A second cost estimate has been received and value engineering efforts continue to reduce cost
- A community Open House was held in August
- The new storage building is open and being used by district staff

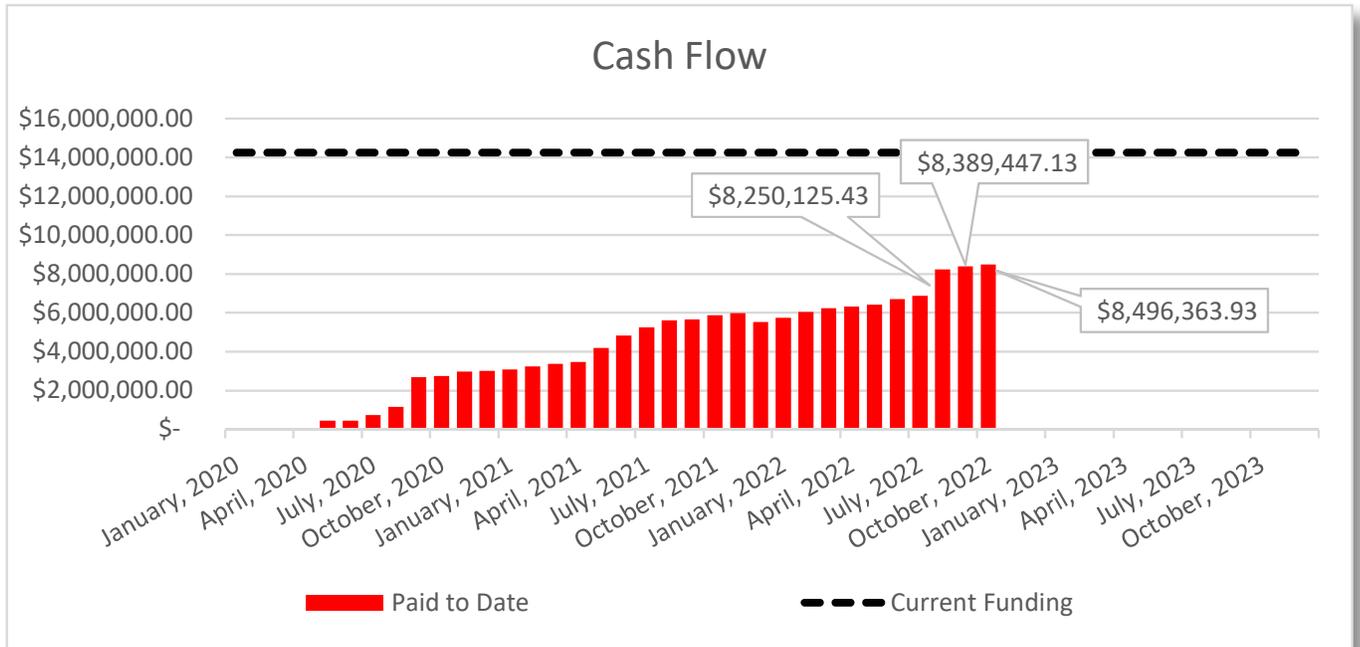
Upcoming Activities:

- New School Construction Document Design phase meetings with district stakeholders and consultants
- General contractor qualifications process
- Submit for land use with the City of Wilsonville

NEW PRIMARY SCHOOL @ FP

Q3 2022





This project will roll out in phases across the District and include a wide array of infrastructure and devices that support student learning.

Recent Activities:

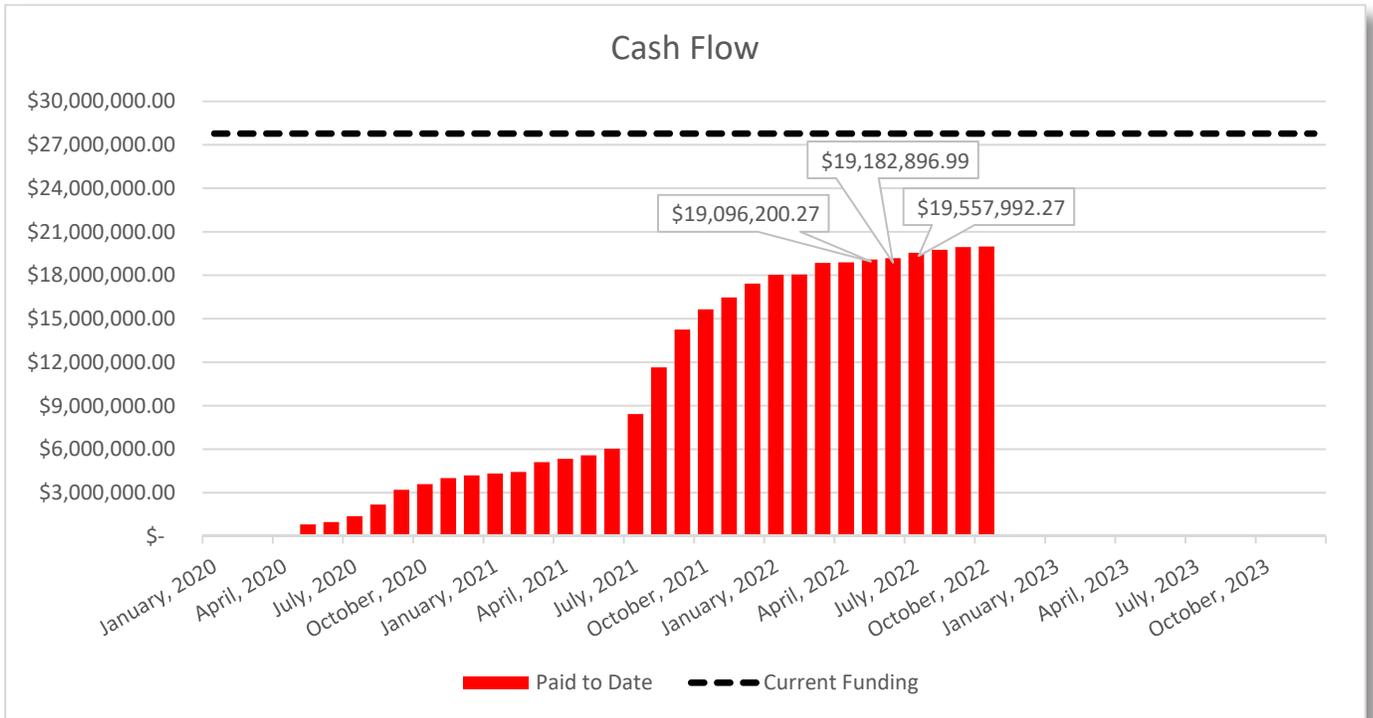
- Deployment of additional flat-screen Classroom Display Systems
- Orders placed for 3,500 Chromebooks to replace existing units at end of life
- Security updates across the district
- Re-wiring projects at Boeckman Creek and Stafford Primary Schools is complete

Upcoming Activities:

- Continuing updating end of life Chromebooks districtwide
- Printer Fleet replacement continues with supply chain issues
- Wifi updates have begun with delays due to supply chain issues

FACILITY IMPROVEMENTS

Q3 2022



These projects across the District will roll out in phases and include safety, life cycle replacement of building systems, energy efficiency upgrades, accessibility improvements and renovations. The following pages will provide updates for each of these projects.

19034.011 – Renovation at Wood Middle School

Project Status:

Light renovation through various parts of the school, total renovation of front classroom cluster, relocation of office and creation of maker space and a restroom/concessions building addition. Design includes security upgrades, energy efficiency improvements, and the life cycle replacement of mechanical and fire alarm systems.

Recent Activities:

- This project is complete

Upcoming Activities:

FACILITY IMPROVEMENTS

Q3 2022

19053.017 – Roofing at Boeckman Creek Primary School

Project Status:

This project includes concrete tile roof replacement at Boeckman Creek Primary School.

This project is on hold.

19054.017 – Fire Sprinklers at Boeckman Creek Primary School

Project Status:

This project includes fire sprinkler main line replacement at Boeckman Creek Primary School.

This project is substantially complete. Final testing and addressing minor leaks in existing portions of the system will continue through the Fall, outside of school hours.

19057.009 – Recabling Project at Boeckman Creek and Stafford Primary Schools

Project Status:

This project includes recabling to update to CAT 6 and 6A at both Boeckman Creek and Stafford Primary Schools.

This project is substantially complete.



West Linn – Wilsonville Schools

**Long Range Planning Committee Meeting
West Linn High School
5464 West A Street, West Linn, OR 97068
Wednesday, October 19, 2022 6:00 PM**

To: **Mary Pettenger** **Marina Cresswell**
Kim Jordan **Alina Eglund**
Amy Paterson-Sandie **Ramiro Diaz**
Parasa Chanramy **Kirsten Wyatt (Board Liaison)**
Kathy Ludwig **Andrew Kilstrom**
Remo Douglas **Amy Berger**

From: Pat McGough, Chief Operating Officer

Subject: Addressing Capacity/Future Areas of Residential Growth

The mission of the Long Range Planning Committee is to estimate facility needs well into the future. The District has historically purchased land for future school sites 20-30 years before the capacity of existing schools has been exceeded, signaling the need to build a new school. Anticipating residential growth is difficult to predict with certainty, but is guided by regional and local plans for development. The relevant plans are the Metro Urban Growth Boundary, the Urban Reserve and the City of Wilsonville Master Plan. The specific area for planned growth is the Frog Pond area, both East and South. While Frog Pond North (area 4G in the attached map) is in the early planning stages, it too should be considered when planning future school sites. These plans provided guidance for the District's 2019 Long Range Plan. In communication with the City of Wilsonville and Metro planners, areas identified as Rural Reserve are unlikely to be brought into the Urban Growth Boundary for the foreseeable future, if ever.

The City of Wilsonville Master Plan anticipates up to 1,800 residential units in area 4H of the Urban Reserve (see attached map). The mix of single-family units to multi-family units is unknown at this time, but City Planners have informally indicated a 3 (single-family) to 1 (multi-family) ratio. That would place each estimate at 1,350 single-family units and 450 multi-family units. For estimating the student yield factors used for new housing, FLO Analytics projects single-family units to yield the following:

K-5: 1,350 Single-family units @ .285 students per unit = 385 Students
 450 Multi-family @ .111 per unit = 50 students.
 Total: 435 students

Grades 6-8: 1,350 Single-family units @ .111 students per unit = 150 Students
 450 Multi-family @ .055 per unit = 25 students.
 Total: 175 students

Grades 9-12: 1,350 Single-family units @ .125 students per unit = 169 Students
 450 Multi-family @ .071 per unit = 32 students.
 Total: 201 students

High schools within the District have capacity to accommodate this projected student yield with the opening of Riverside High School. Middle School capacity can also accommodate the student yield with the full buildout of Meridian Creek. Primary Schools, specifically in the Wilsonville area, will far exceed the capacity with an anticipated yield of 435 students. District planning should include acquisition of land that can accommodate a new primary school.

Recent property acquisitions by the District have been passive: property owners have approached the District with offers to sell. A more intentional approach may be needed in addressing future property needs.

The District is looking to the Long Range Planning Committee to make recommendations regarding acquiring land for future school sites. Recommendations can be to begin actively looking for land, wait for property owners to approach the District with offers to sell, or delay any acquisitions until a future unspecified date.

Figure 26 – Student Yield Factors Used for New Housing Development

Single-Family (SF) Units				
Grade Groups	K-5	6-8	9-12	K-12
Student Yield Factor	0.285	0.111	0.125	0.521

Multi-Family (MF) Units				
Grade Groups	K-5	6-8	9-12	K-12
Student Yield Factor	0.111	0.055	0.071	0.237

Overall average student yield factors used by FLO for these enrollment forecasts. Factors used for each development were approximated at the neighborhood level by looking at existing student ratios (per SF and MF unit) in all housing units for each of those neighborhoods, and adjusting those ratios using development-specific information provided by planners, as well as educated assumptions about trends specific to new development.



Background and Context

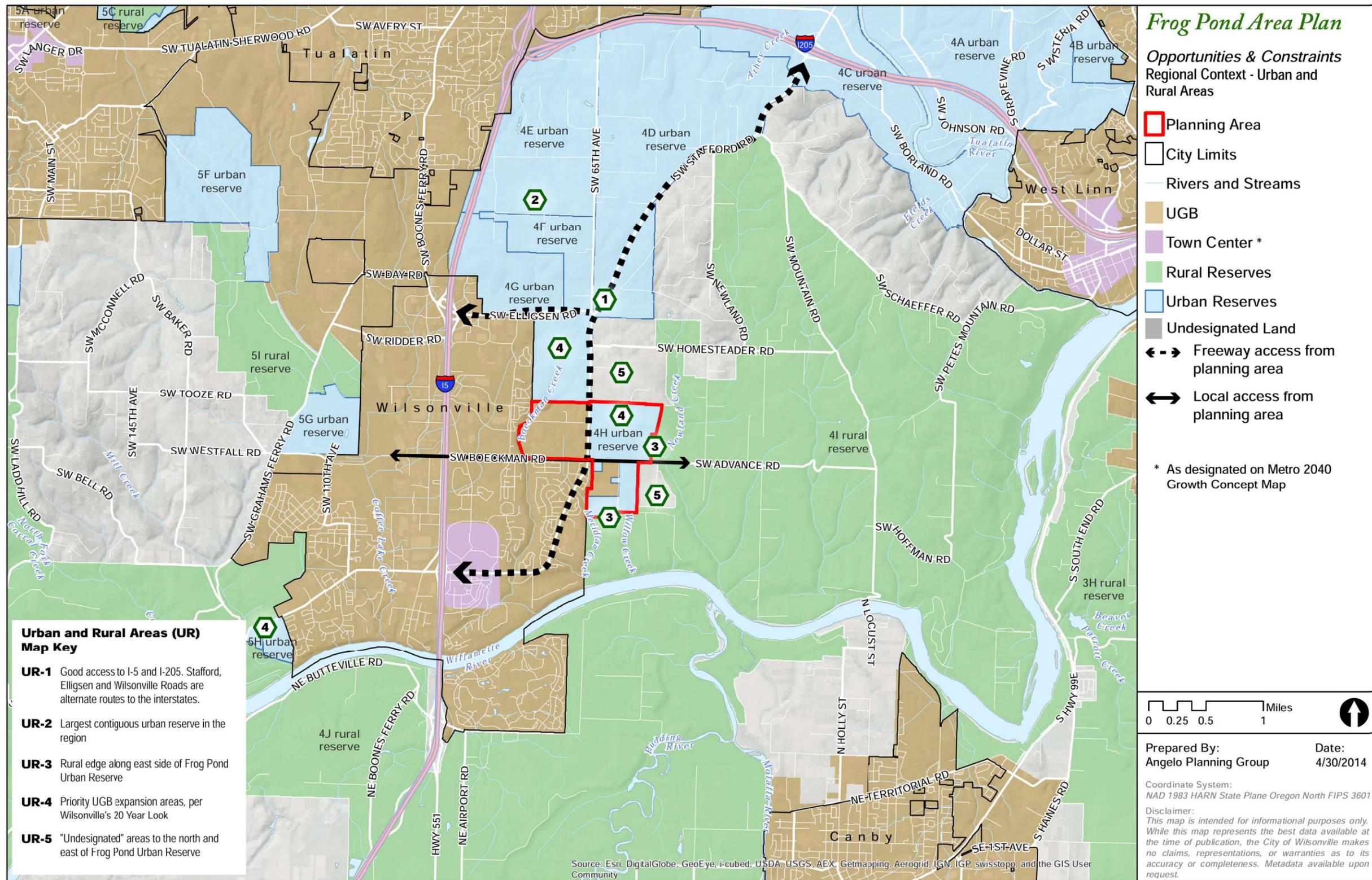


Figure 4. Regional Context - Urban and Rural Areas