



West Linn – Wilsonville Schools

To: Tim Woodley, Director of Operations
From: Remo Douglas, Project Manager
Date: March 2, 2015
Subject: 2014 Capital Bond District-Wide Improvements List

The School Board has emphasized the importance of long range planning through it's annual Board Goals over the last several years. The Board, Long Range Planning Committee, staff and countless volunteers have put tremendous effort into accomplishing these goals:

2011-2012 Board Goal 2: Continue to manage bond projects for maximum value, and review, revise, and update the district long range facilities plan.

2012-2013 Board Goal 3: Manage facilities and long range planning to optimize the student learning environment and the stewardship of assets.

2013-2014 Board Goal 3: Conduct long-range capital improvement and financial planning through processes and practices that lead to long-term financial stability and sustainability and are responsive to community growth and student learning needs of the future.

2014-2015 Board Goal 3: Establish long-term financial stability and sustainability and maintain responsiveness to community growth and student learning needs by engaging in practices and processes leading to a successful result in a capital bond and local option levy election.

This effort reached its latest crescendo when voters successfully passed ballot measure 3-456 in November of 2014. One of the seven components described as part of the capital improvement program was district-wide improvements. The strong public support received by the District over many years has reduced deferred maintenance to a point where it has become inaccurate to use the term in relation to 2014 bond projects. These district-wide improvement dollars will be used to maintain and preserve existing school facilities, protecting the investments already made by patrons. Projects are proposed to repair or replace aging roofs, windows, paint, flooring, and mechanical/electrical systems. Projects will produce energy saving improvements to many of its schools and facilities. The purpose of this document is to recount the process used to develop the final list of improvements projects that are included in the bond program.

In the fall of 2013 a series of meetings were held with building principals. Each principal was asked to provide a list of improvements for their school. Additionally, maintenance staff assessed the status of facilities across the District and documented improvements that may be required over the next five to ten years. These lists were combined into a single master list of potential district-wide improvements.



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The list of potential improvements was substantial, and required categorizing to be easily understood. A spreadsheet was developed to better organize the information. Each improvement was assigned a value for several fields that allowed the District to sort and filter the information. These fields include:

- School Level
- School Name
- Type
- Category
- Scope
- Value

Each field helped the District to better and more quickly analyze the list of potential improvements. The ability to sort and filter by school level and name allowed the District to show the public what improvements are happening at a particular school, and to group selected improvements into a project at a school.

The Type field has five options, listed below. This field helped the District to quickly request estimating assistance from the appropriate sources. Type will also be useful for grouping improvements into logical projects.

- I – Site Improvements
- II – Interior Improvements
- III – Furniture / Fixtures / Equipment
- IV – Roofing / Exterior Envelope
- V – Mechanical / Electrical / Plumbing

The Category field has three tiers, listed below. This field was the primary tool for prioritizing projects in order to determine which projects were funded under the 2014 bond.

- A – Mission Critical: Mission critical improvements represent work to correct issues that are in/near failure, are out of compliance with code thereby failing to pass critical inspections or cause inordinate labor/repair to keep operational.
- B – Mission Important: Mission important improvements are those that may not be a threat to daily operations, but do have significant value toward efficiency and effectiveness in operations and/or curriculum delivery.
- C – Deferrable: Deferrable improvements are those that are not in failure, nor necessarily to improve instruction or student performance. This list contains items that are currently functional but may require repair/replacement in the next 10-years or are suggested as upgrades that would be useful but not critical.

Using professional engineers and industry knowledge, estimates were developed for each of the improvements on the list. Several meetings were held to assess the estimates and the urgency of each item. At the same time the Long Range Planning Committee and School Board were both discussing the



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funding capacity of a potential bond, and how the funds should be distributed to proposed bond components. The figure selected for district-wide improvements was \$7 million dollars, fully funding the Mission Critical improvements. A final review of the scope confirmed that the community's investments could be adequately protected within this budget, and a final list of district-wide improvements was posted to the District website.

Moving forward these improvements will be bundled into projects to create a bidding environment for contractors that is favorable to the District in terms of cost effectiveness. The improvement projects will be phased to balance speed of delivery and administrative cost. Additional consideration will be given to the completion of the entire program on schedule and under budget.