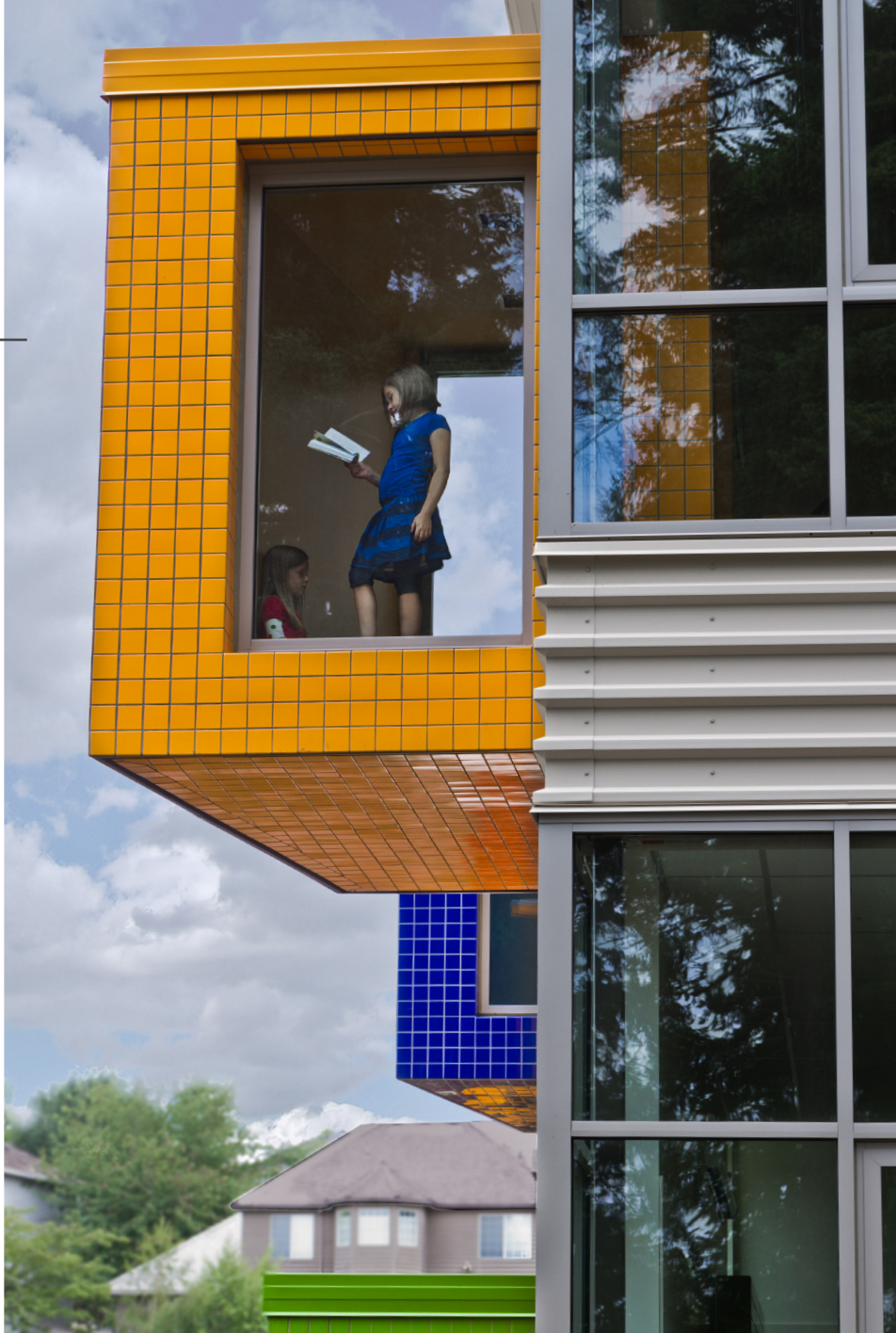


January 2016



## WEST LINN - WILSONVILLE SCHOOL DISTRICT

2014 Capital Bond Program  
Quarterly Report

Q4 2015

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Q4 2015

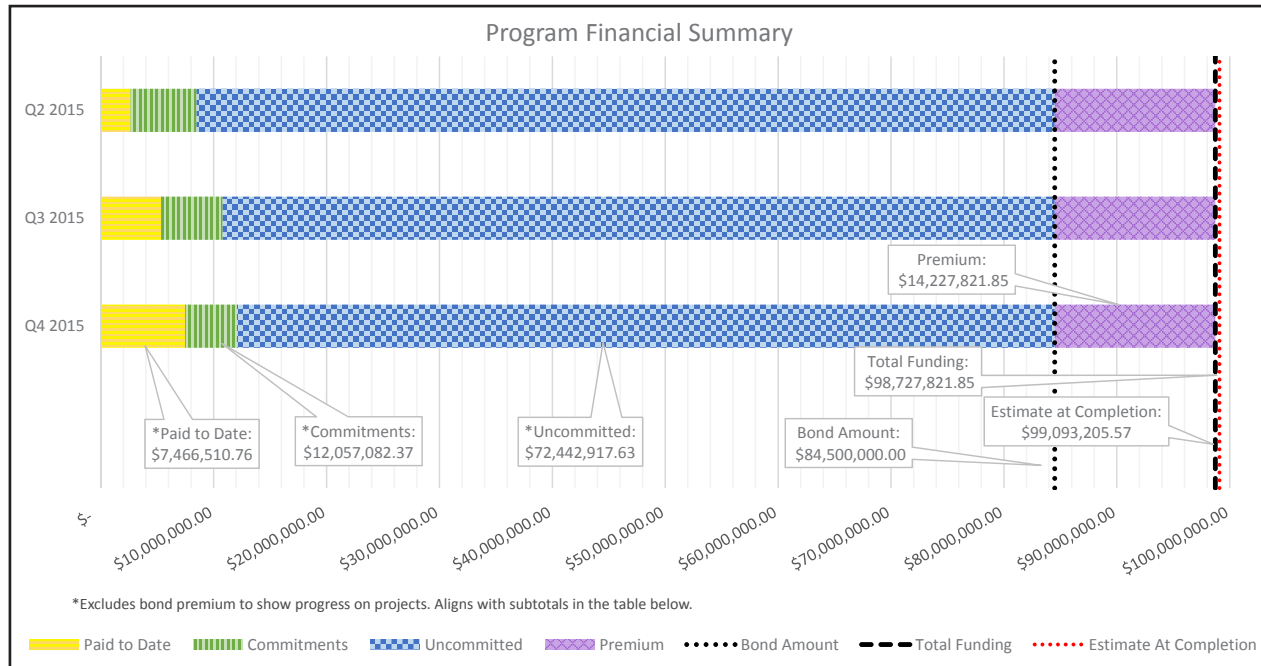


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# PROGRAM SUMMARY

## Q4 2015



	Original Funding	Approved Changes	Current Funding	Current Commitments	Actuals Approved	Estimate At Completion	Forecasted Over/(Under)
New Middle School in Wilsonville	40,000,000.00	0.00	40,000,000.00	3,648,424.96	1,336,590.25	48,080,182.08	8,080,182.08
Sunset Primary School Replacement	24,000,000.00	0.00	24,000,000.00	2,508,025.03	953,553.37	29,189,256.71	5,189,256.71
700 Building Renovation & Addition @ WLHS	3,000,000.00	0.00	3,000,000.00	417,103.97	234,953.79	3,841,127.22	841,127.22
Performing Arts Renovation & Addition @ WHS	3,000,000.00	0.00	3,000,000.00	389,900.72	260,288.64	3,225,175.14	225,175.14
Technology @ D-W	7,000,000.00	0.00	7,000,000.00	3,021,139.75	2,995,559.75	7,000,000.00	0.00
Safety & Security @ D-W	500,000.00	0.00	500,000.00	205,304.54	159,076.34	500,000.00	0.00
Improvements @ D-W	7,000,000.00	0.00	7,000,000.00	1,867,183.40	1,526,488.62	7,000,000.00	0.00
<b>Subtotals</b>	<b>84,500,000.00</b>	<b>0.00</b>	<b>84,500,000.00</b>	<b>12,057,082.37</b>	<b>7,466,510.76</b>	<b>98,835,741.15</b>	<b>14,335,741.15</b>
<b>*Bond Premium</b>	<b>14,227,821.85</b>	<b>0.00</b>	<b>14,227,821.85</b>	<b>257,464.42</b>	<b>257,464.42</b>	<b>257,464.42</b>	<b>(13,970,357.43)</b>
<b>Grand Totals</b>	<b>98,727,821.85</b>	<b>0.00</b>	<b>98,727,821.85</b>	<b>12,314,546.79</b>	<b>7,723,975.18</b>	<b>99,093,205.57</b>	<b>365,383.72</b>

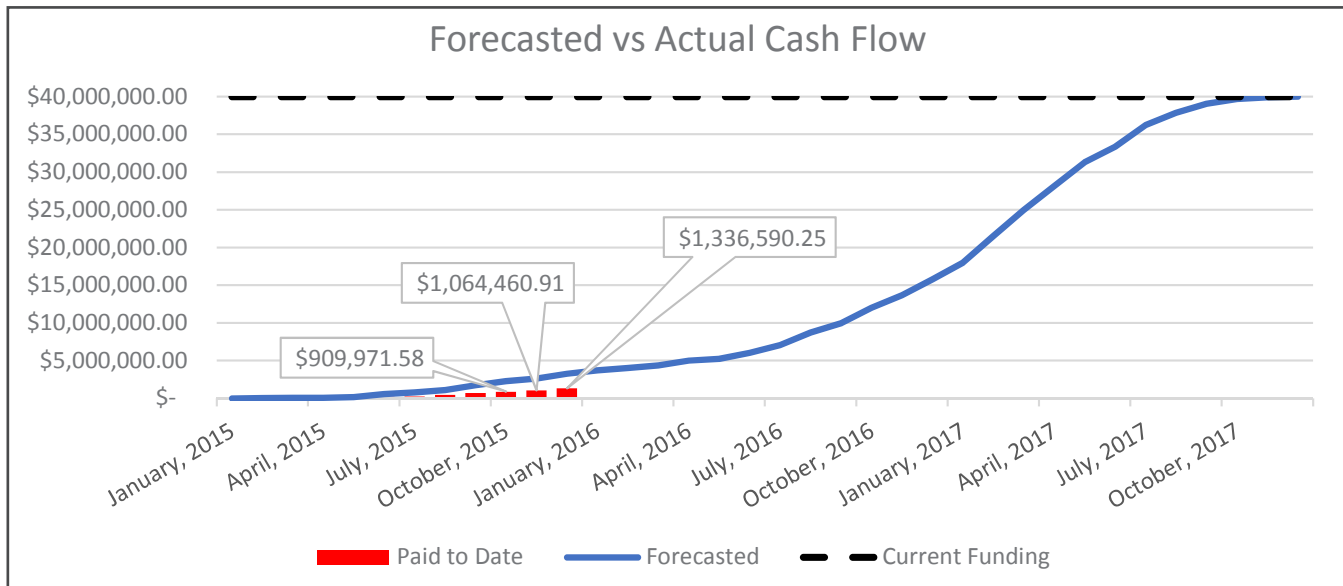
\*Includes \$4,505,000.00 in as-yet unsold bonds

- Designs for all four major construction projects are well underway. The first estimate for each of the two new schools has been received. These estimates are based on Schematic Design drawings, which are somewhat conceptual in nature. The second estimate for each of the high school projects has been received. These estimates are based on Design Development drawings which are more refined.
- The Bond Management Team continues to monitor market conditions and assess project scopes in light of estimates. The next series of estimates will be received over the course of January and February. The Estimate at Completion for the program is currently estimated to exceed total funding by \$365,383.72.
- The Estimate at Completion assumes that the projects will be constructed as discussed prior to passage of the bond measure. Specifically, Sunset Primary School being built to the full 450 student capacity, and the new Middle School in Wilsonville opening as a starter school with a 475 student capacity.
- Design Development drawings for Sunset Primary have been received and sent to two separate estimating firms as an added measure to gauge market conditions. This exercise will also be instructive to the District's review of the other projects estimates.



# NEW MIDDLE SCHOOL IN WILSONVILLE

## Q4 2015



	2014		2015										2016										2017														
	Q4		Q1		Q2		Q3		Q4		Q1		Q2		Q3		Q4		Q1		Q2		Q3		Q4												
	N	D	J	F	M	A	M	J	J	A	S	O	N	D	J	F	M	A	M	J	J	A	S	O	N	D	J	F	M	A	M	J	J	A	S	O	N
Design	PLANNED																																				
	ACTUAL																																				
Permit	PLANNED																																				
	ACTUAL																																				
Construct	PLANNED																																				
	ACTUAL																																				

### Recent Activities:

- The Bond Management Team has reviewed the design with the educational specifications group and the Architect presented the project to the School Board on October 19th. Both groups provided positive feedback to the design.
- The School Board approved a resolution for the District to enter into an intergovernmental agreement for the right-of-way work associated with the development of the Middle School.
- The School Board passed a resolution authorizing the use of a qualifications based low-bid procurement method for the general contractor.
- The stage 2 land use application achieved completeness with the City of Wilsonville on January 6, 2016.

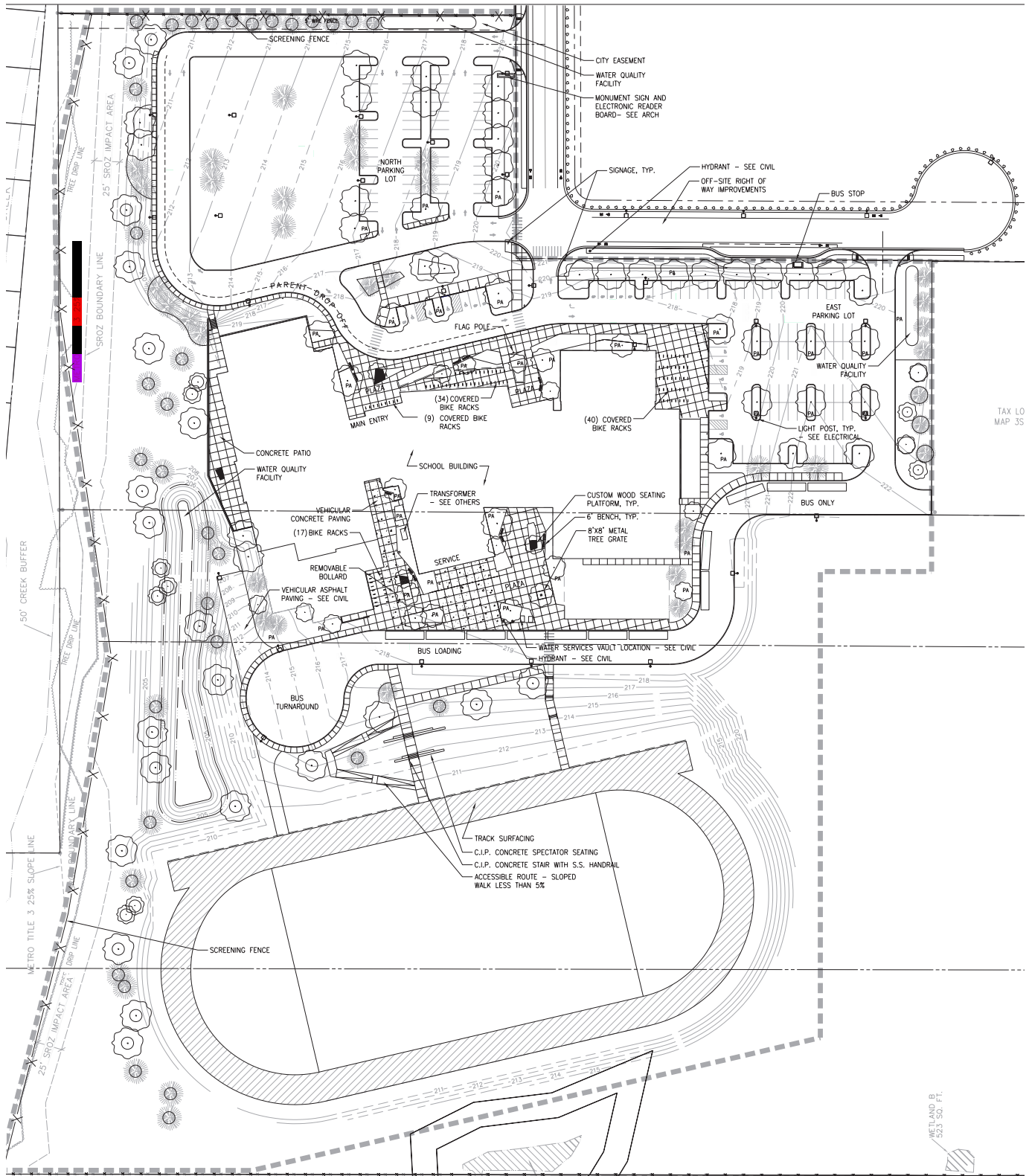
### Upcoming Activities:

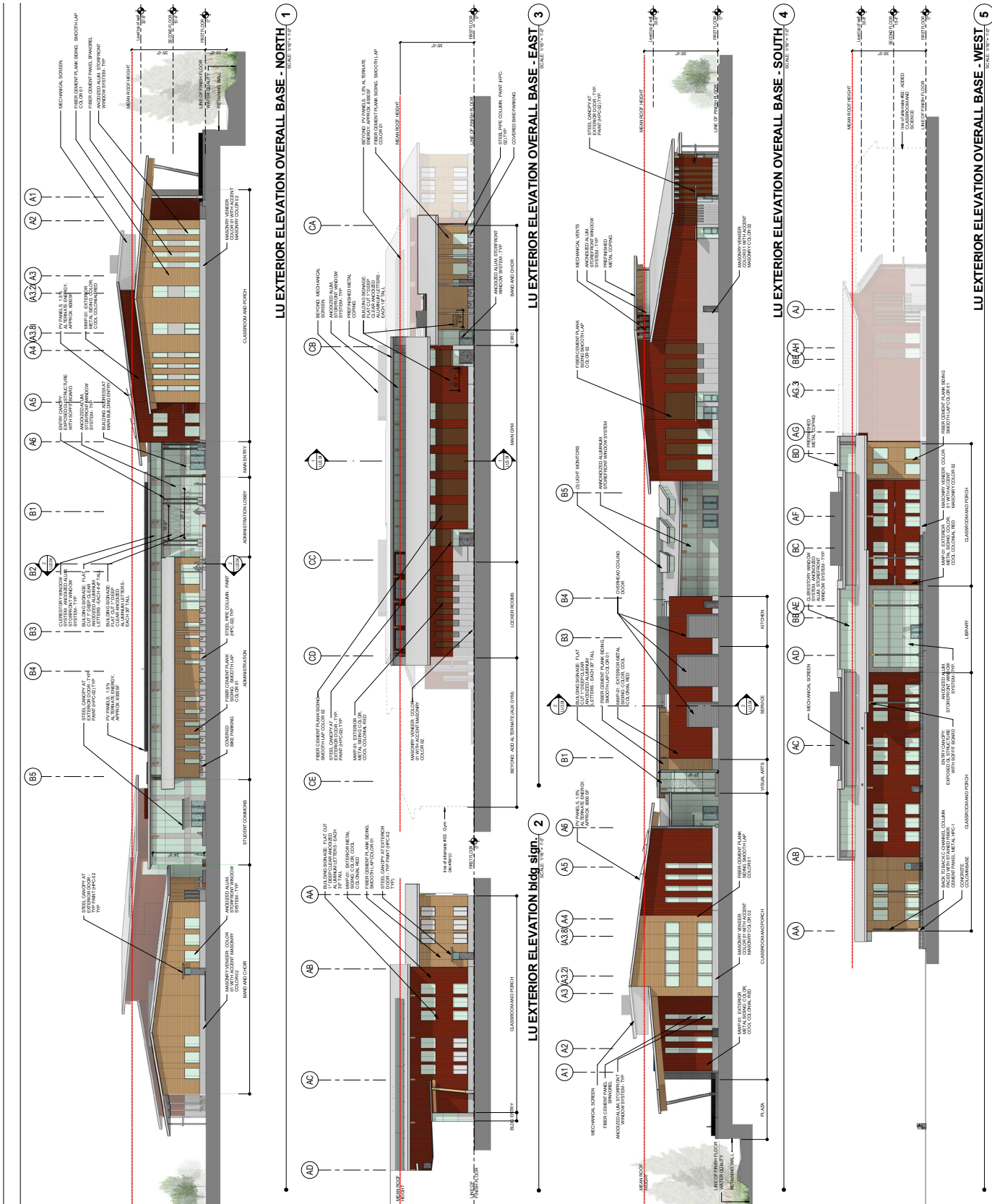
- The base design for the project is a starter middle school as discussed prior to passage of the bond. The starter school will have a 475 student capacity. The District will receive estimates for additive alternate options including a maker space and technology classroom addition, a 250 student classroom addition, and an auxiliary gymnasium addition. It is expected that market conditions will prevent the District from being able to accept multiple alternates, though there may be an opportunity to accept the STEM addition.
- The Bond Management Team continues to explore options for procurement and value engineering for the project.
- The contractor selection process will begin in February.
- A site package including grading, major utilities rough in, and building pad will be submitted for permit in February.
- Design Development for the building is scheduled to be complete in January. A detailed estimate is scheduled to be complete in late February.
- The project team will submit a request to the School Board to use a qualifications based low-bid procurement method for the digital controls package.

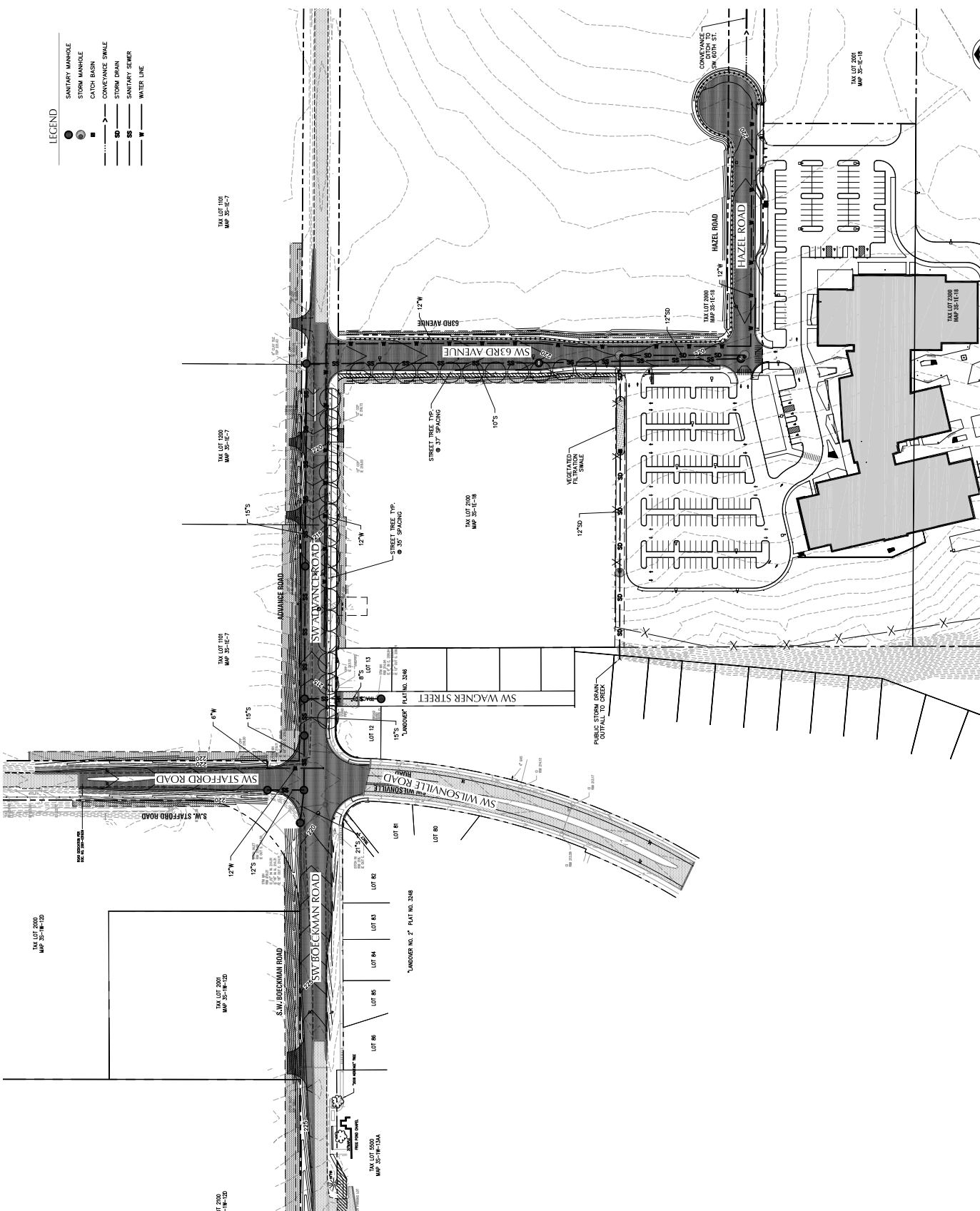


# NEW MIDDLE SCHOOL IN WILSONVILLE

Q4 2015



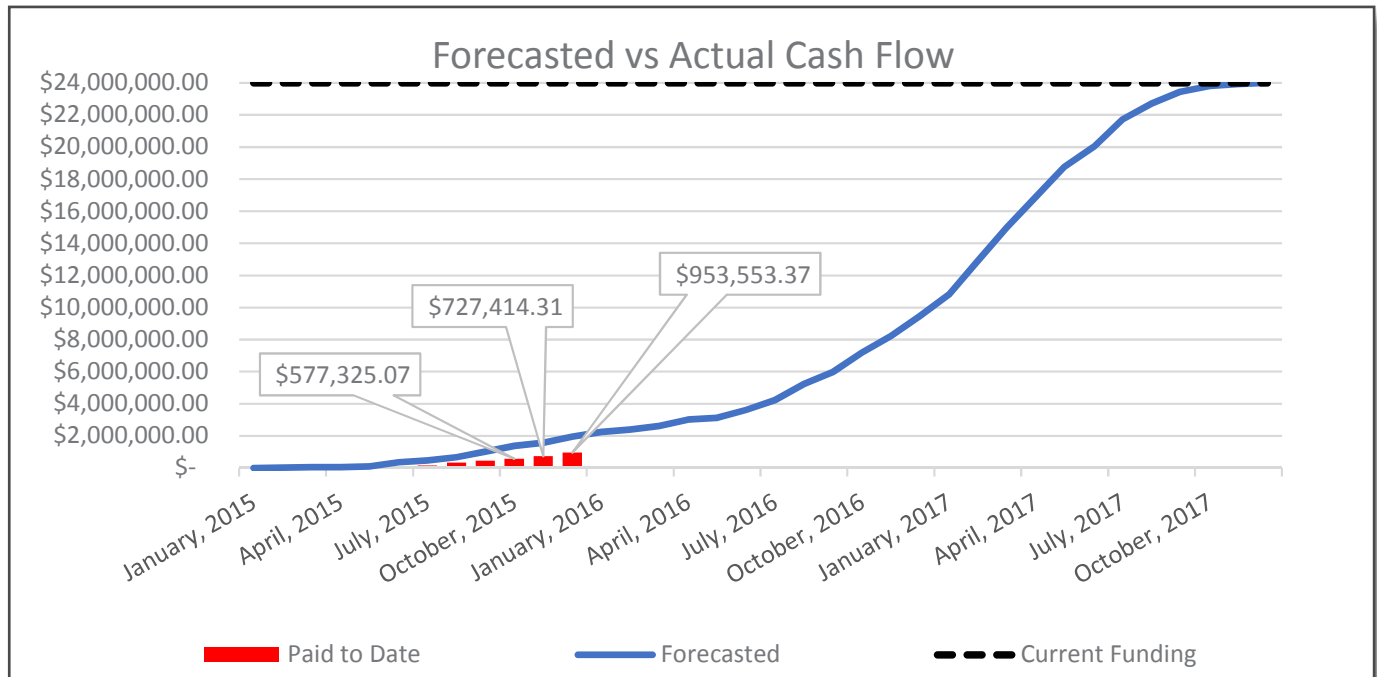


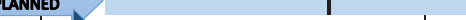



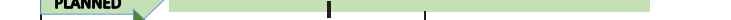







# SUNSET PRIMARY SCHOOL REPLACEMENT

## Q4 2015



	2014		2015												2016												2017											
	Q4		Q1			Q2			Q3			Q4			Q1			Q2			Q3			Q4			Q1			Q2			Q3			Q4		
	N	D	J	F	M	A	M	J	J	A	S	O	N	D	J	F	M	A	M	J	J	A	S	O	N	D	J	F	M	A	M	J	J	A	S	O	N	D
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### Recent Activities:

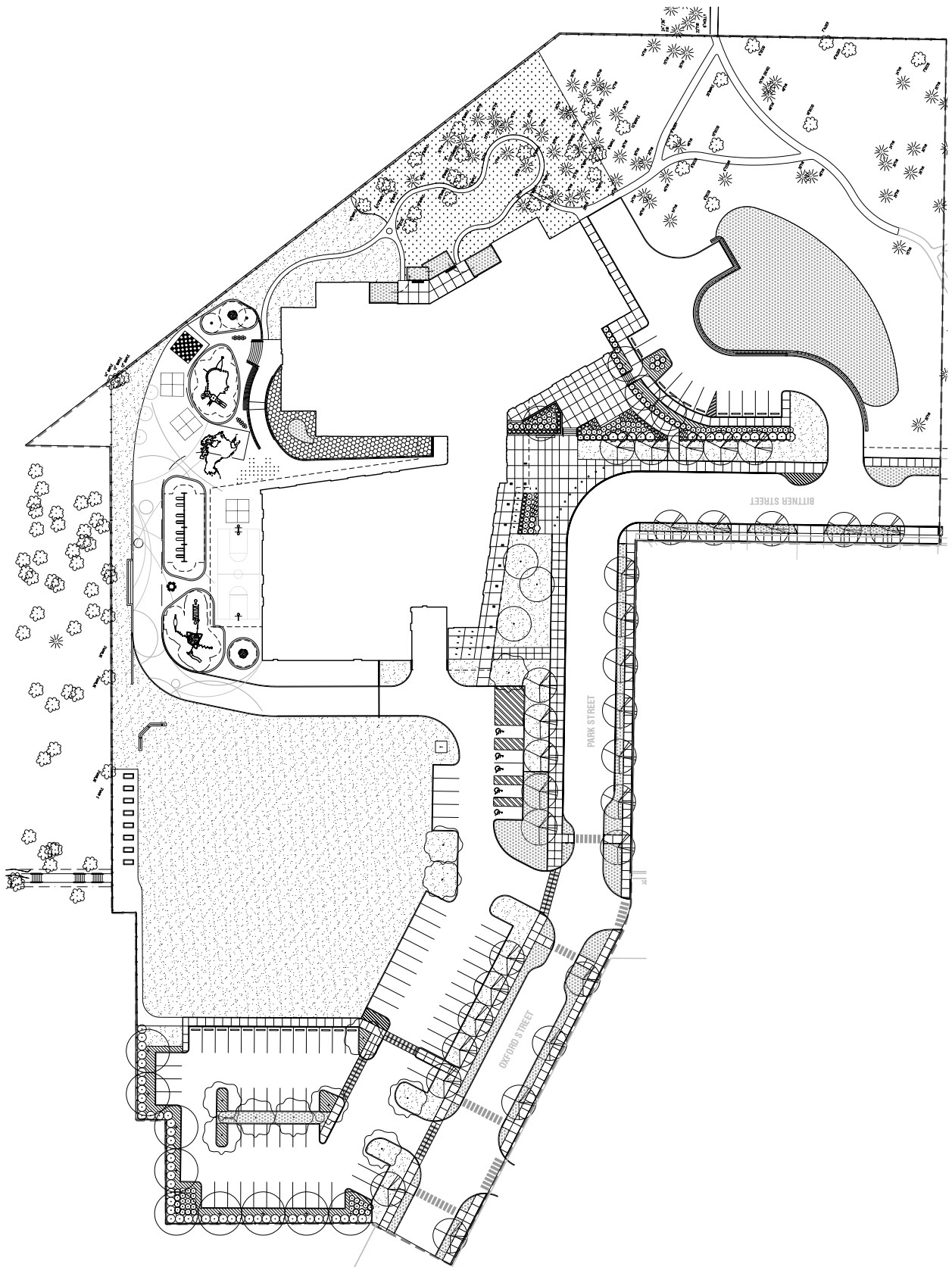
- Design Development drawings have been received and sent to two separate estimating firms as an added measure to gauge market conditions.
- The Bond Management Team has reviewed the design with the educational specifications group and the Architect presented the project to the School Board on October 19th. Both groups provided positive feedback to the design.
- The project team met with the Sunset Neighborhood Association on two occasions. The primary concerns seem to center around the fire access drive on the south side of the building and the associated parking spaces. The proposed design accommodates these concerns to the extent possible within the City of West Linn Development Code.
- The project was submitted for Land Use with the City of West Linn in November.
- The School Board passed a resolution authorizing the use of a qualifications based low-bid procurement method for the general contractor.

### Upcoming Activities:

- The Land Use application is expected to achieve completeness in January, starting a several month permit process.
- The project team will submit a request to the School Board to use a qualifications based low-bid procurement method for the digital controls package.

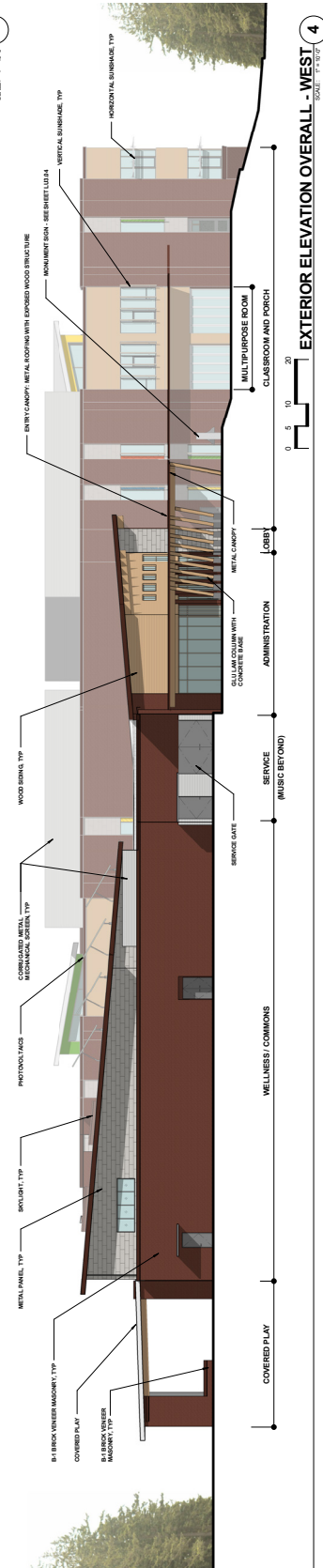
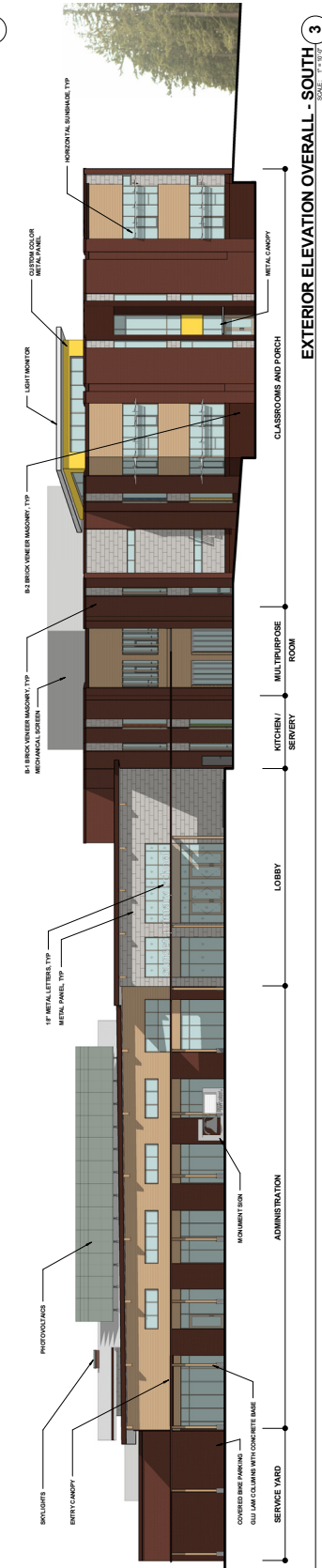
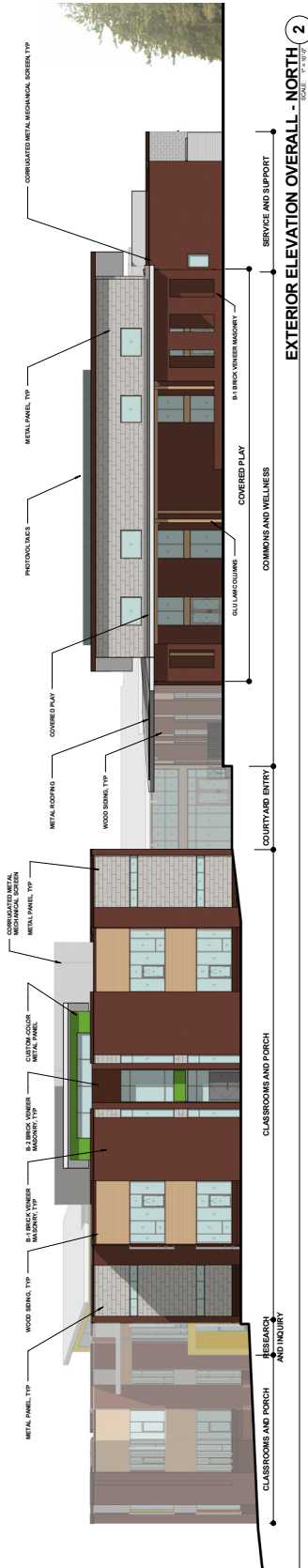
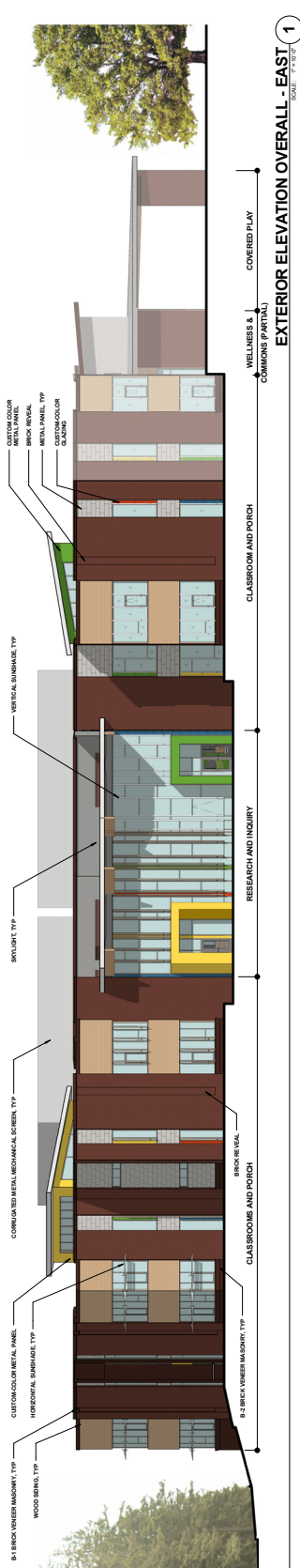
# SUNSET PRIMARY SCHOOL REPLACEMENT

Q4 2015



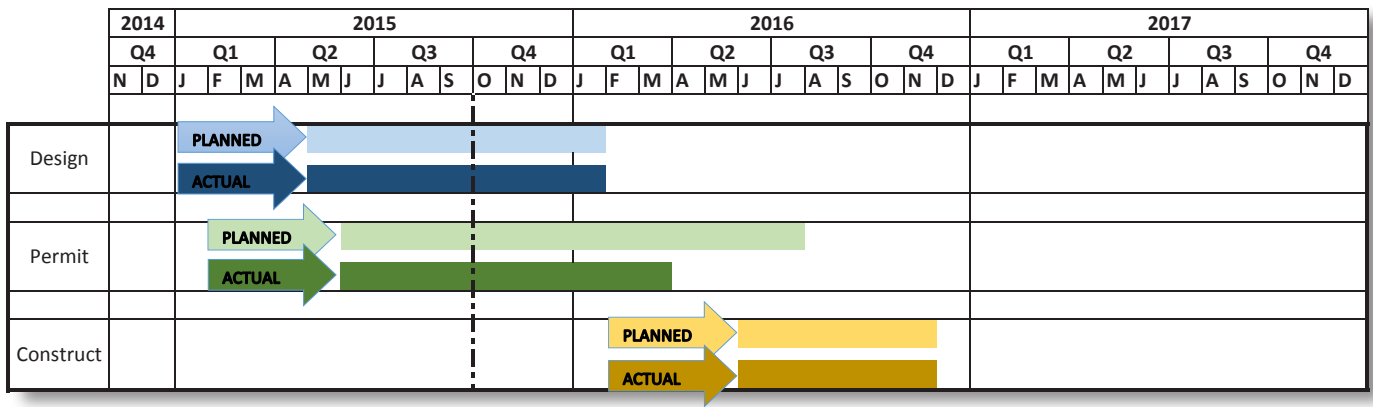
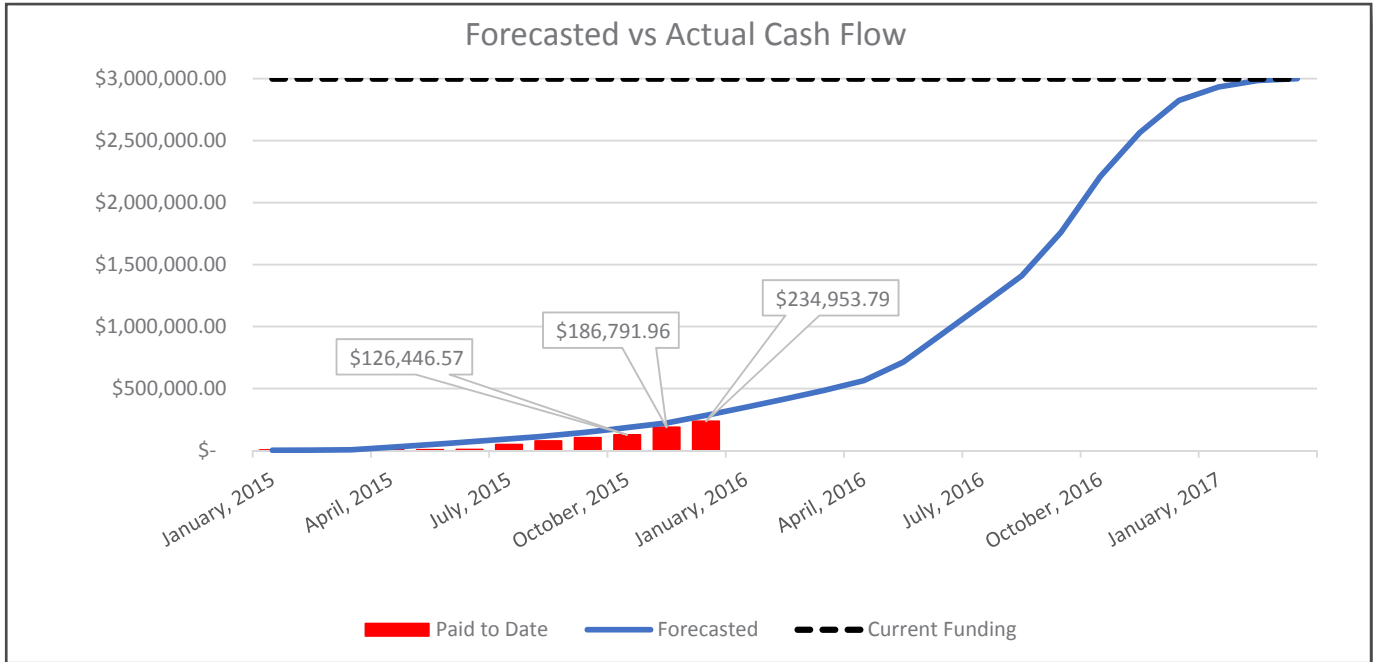
# SUNSET PRIMARY SCHOOL REPLACEMENT

## Q4 2015





## 700 BUILDING RENOVATION & ADDITION AT WLHS



### Recent Activities:

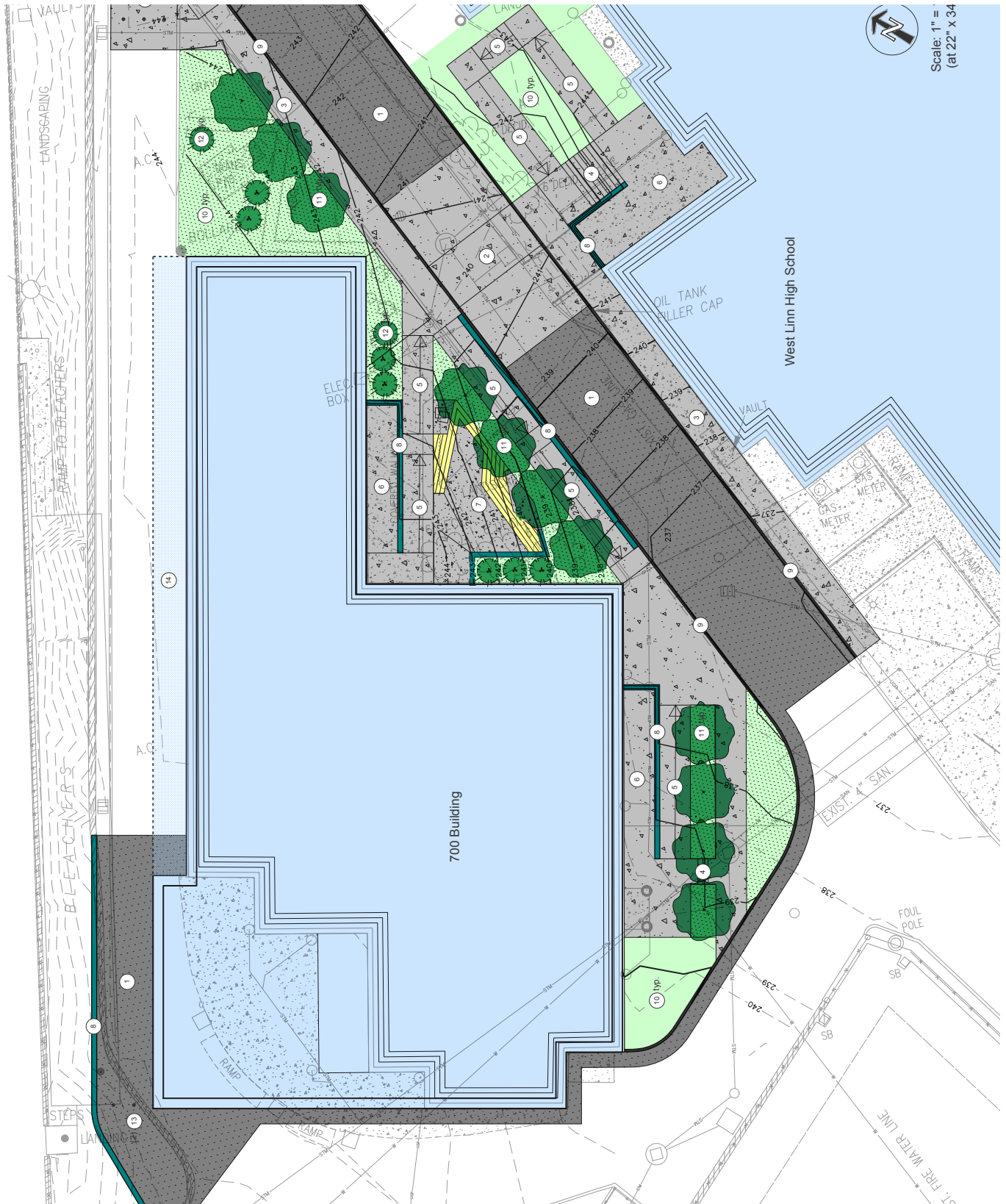
- The design development estimate showed a marked increase in the anticipated cost of construction based on current market conditions and escalation. Scope, including a new roof was added due to significant structural upgrades that will cause major modifications to the existing roof.
- The Bond Management Team has reviewed the design with the educational specifications group and the Architect presented the project to the School Board on October 19th. Both groups provided positive feedback to the design.
- The design development drawings were reviewed and feedback provided to the design team.
- The land use application was approved by the City of West Linn.

### Upcoming Activities:

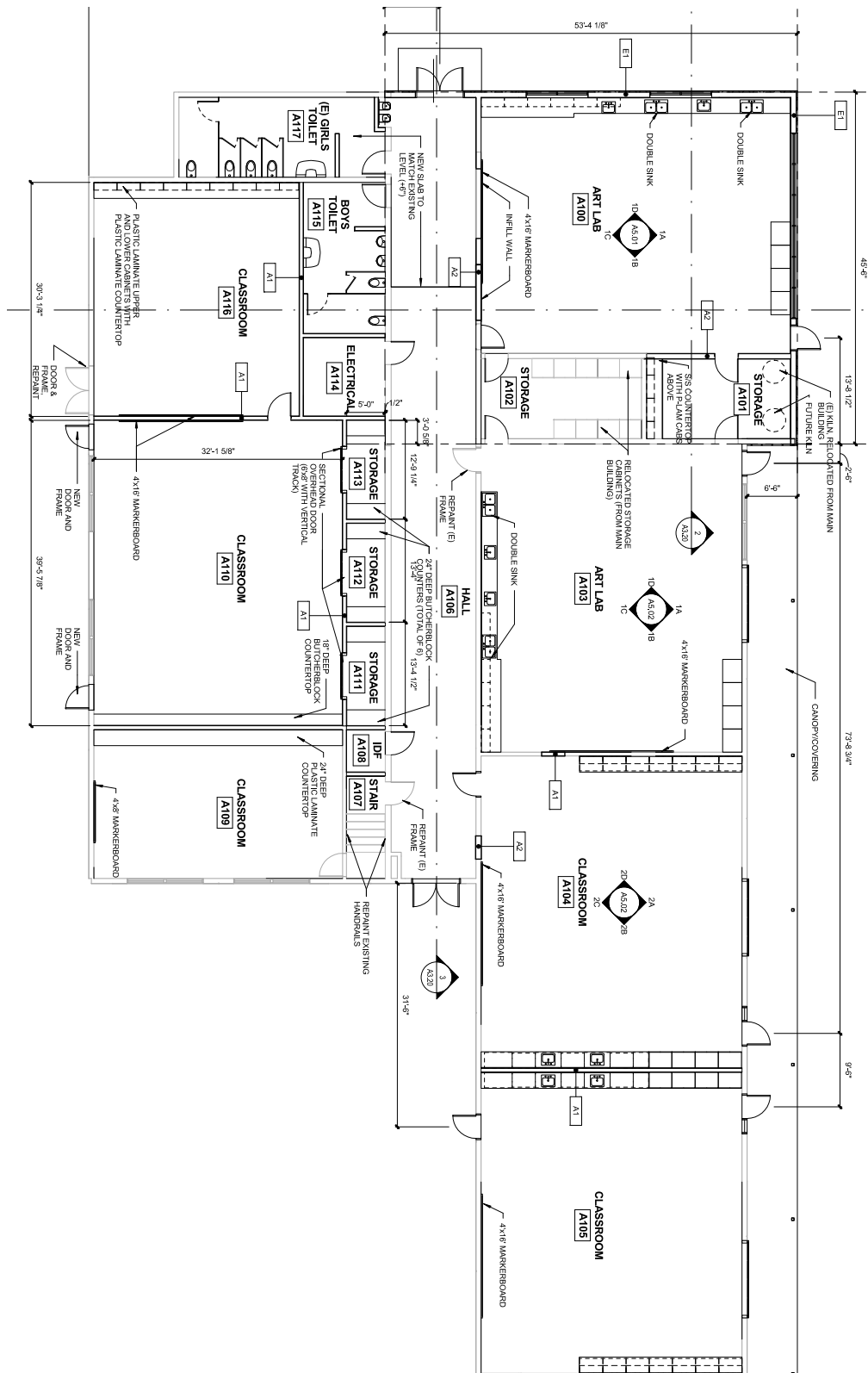
- The construction document phase of design will be complete in late January.
- A final estimate based on the construction documents will be delivered at the end of January.
- The design will be submitted for building permit review in February.
- Contractor bid process is scheduled to begin in February.

# 700 BUILDING RENOVATION & ADDITION AT WLHS

Q4 2015



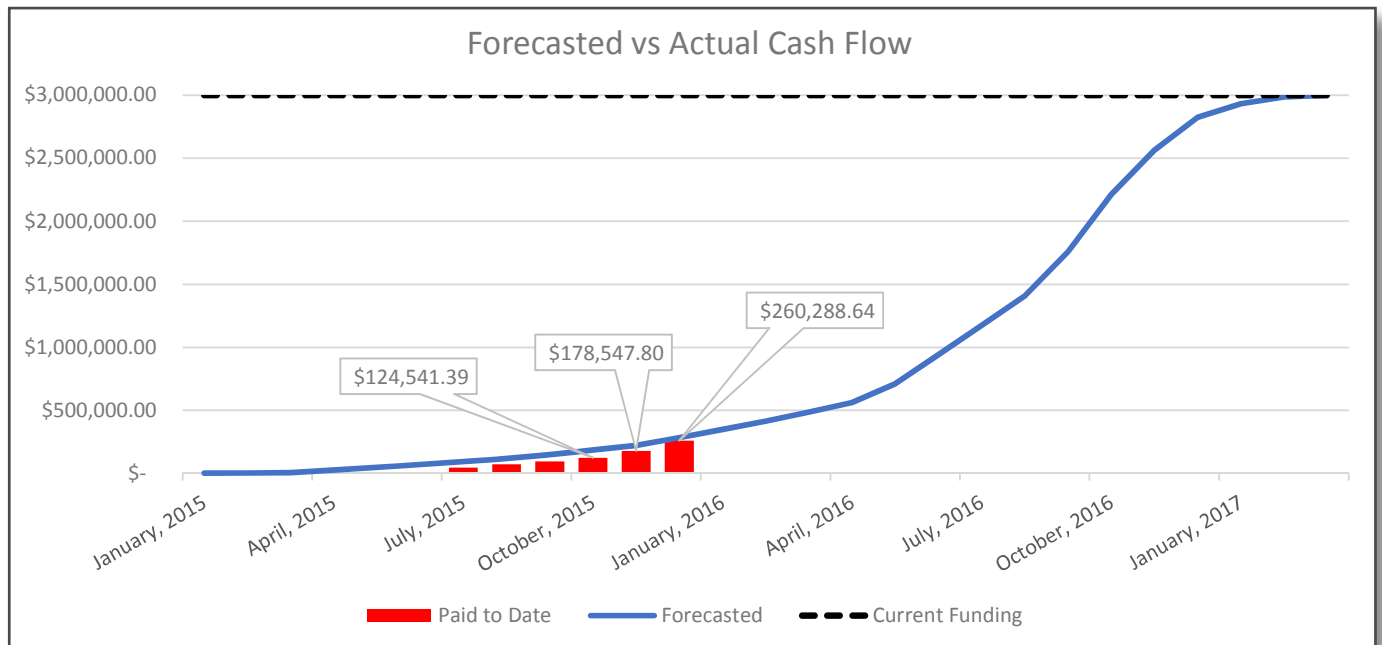
## 700 BUILDING RENOVATION & ADDITION AT WLHS





# PERFORMING ARTS RENOVATION & ADDITION @ WHS

## Q4 2015



	2014		2015										2016										2017																		
	Q4		Q1			Q2		Q3			Q4		Q1			Q2		Q3			Q4		Q1			Q2			Q3			Q4									
	N	D	J	F	M	A	M	J	J	A	S	O	N	D	J	F	M	A	M	J	J	A	S	O	N	D	J	F	M	A	M	J	J	A	S	O	N	D			
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Construct																																									

### Recent Activities:

- The design development estimate showed a marked increase in the anticipated cost of construction based on current market conditions and escalation.
- The design development drawings were reviewed and feedback provided to the design team.
- The construction document drawings have been received and are currently being reviewed by the Bond Management Team.
- The design development estimate is currently being prepared.
- The project received land use approval from the City of Wilsonville.

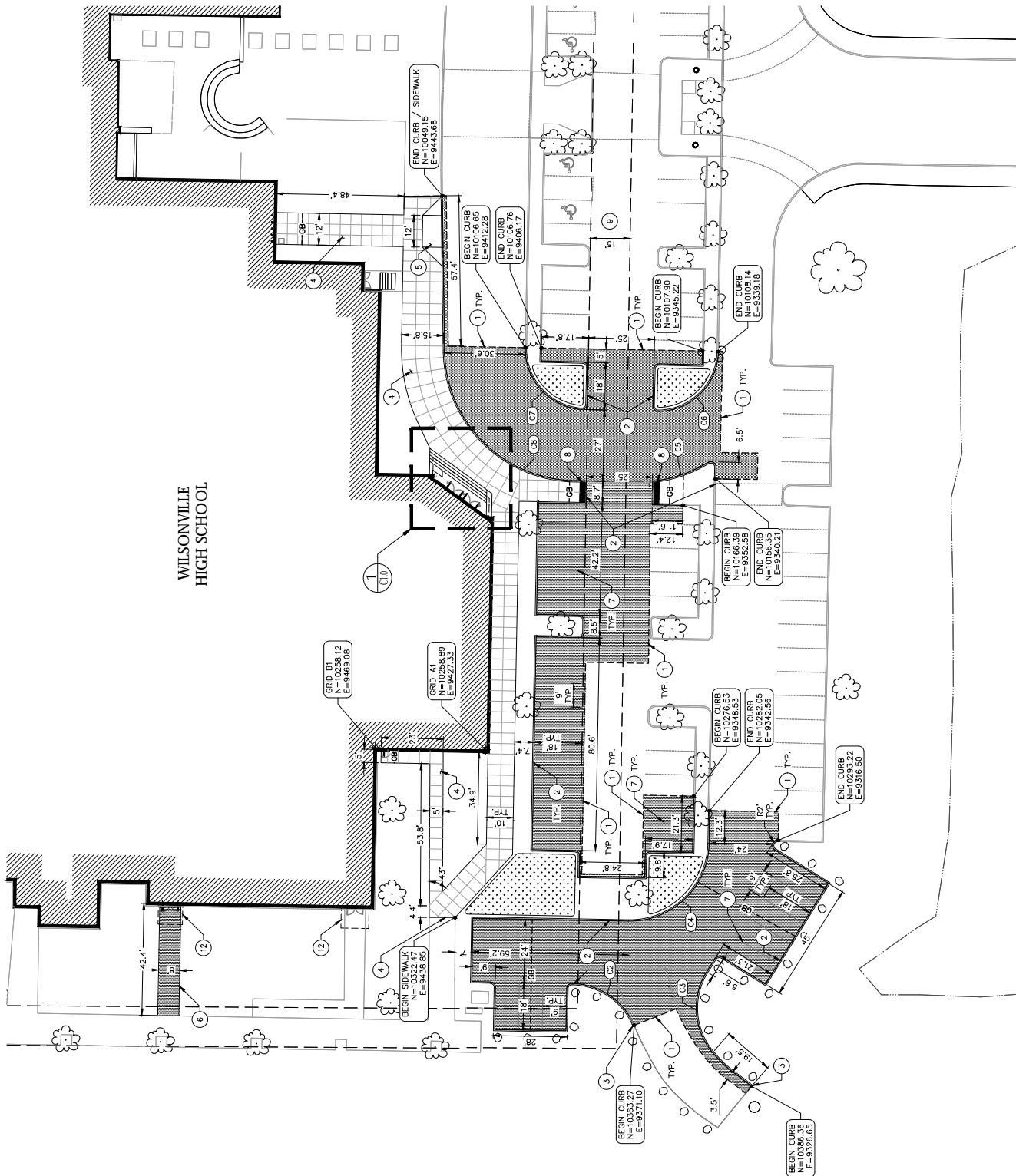
### Upcoming Activities:

- Design development estimate review.
- Building permit process is scheduled to begin in January.
- Contractor bid process is scheduled to begin in February.



# PERFORMING ARTS RENOVATION & ADDITION @ WHS

Q4 2015



Architectural floor plan of the second floor of a building. The plan shows various rooms and their dimensions. The rooms include:

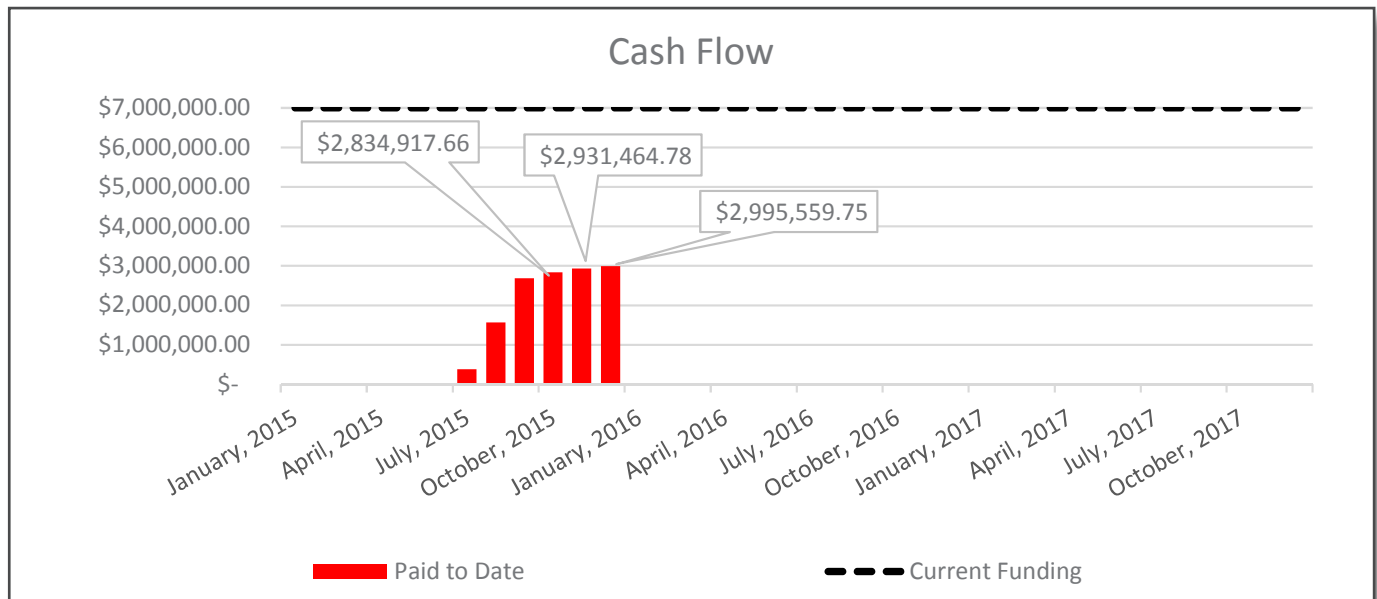
- CHOIR ROOM [A100]
- CHOIR OFFICE [A104]
- MUSIC STORAGE [A103]
- GYM STORAGE [A121]
- PRACTICE [A117, A118, A119]
- DRESSING ROOM [A107]
- HALLWAY [A120]
- PRACTICE [A116]
- ENSEMBLE [A114]
- BAND OFFICE [A112]
- MUSIC STORAGE [A111]
- BAND ROOM [A113]
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- STORAGE [A200]

The plan includes a grid system with letters A through E and numbers 1 through 5. The plan includes a title block in the top right corner with the text 'SECOND FLOOR' and 'ARCHITECTURAL FLOOR PLAN'.



## LEARNING WITH TECHNOLOGY

Q4 2015



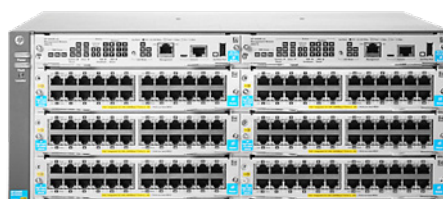
The first major wave of student device updates was completed in the summer of 2015. The next large-scale device update is currently planned for summer of 2017. The primary purpose of staggering these updates is to disperse the financial load of updating obsolete devices across multiple fiscal years. The second goal is to ensure that some current devices are available and in use at all times. The third reason is to balance staff time between installing new devices and routine summer maintenance operations.

### Recent Activities:

- WAN Updates
- Wifi Updates
- Server and Storage Updates
- County Fiberoptic Internet Upgrades
  - District Office
  - Willamette Primary
  - Three Rivers
  - West Linn High
  - Boeckman Creek Primary
  - Wilsonville High
- West Linn High School Auditorium AV Upgrades
- Boones Ferry Primary AV Upgrades
- Boeckman Creek Primary Intercom Replacement
- Device Updates
  - 3D Printers
  - Circuit Kits
  - Computers
  - Projectors
  - Document Cameras

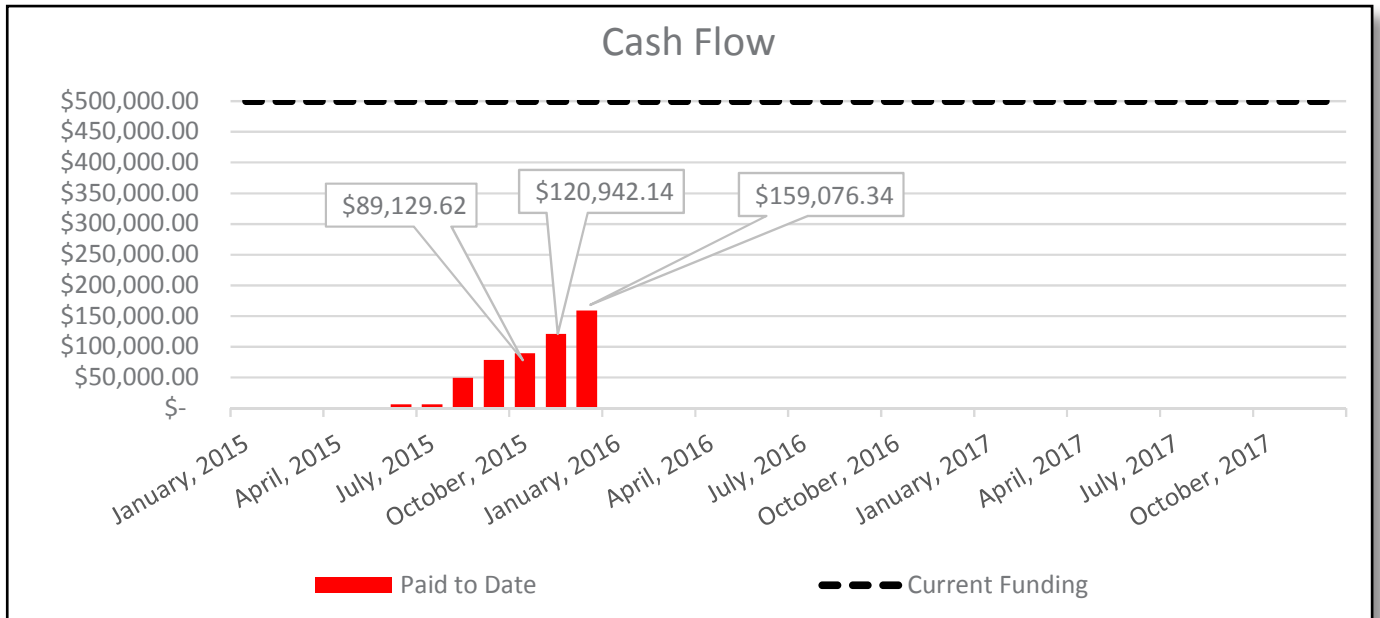
### Upcoming Activities:

- WAN Updates
- County Fiberoptic Internet Upgrades
  - Boones Ferry Primary
  - Inza Wood Middle
  - Bolton Primary
  - Sunset Primary
  - Athey Creek Middle
  - Stafford Primary
  - Trillium Creek Primary
  - Rosemont Ridge Middle
- Planning for Future Updates



## SAFETY & SECURITY

Q4 2015



West Linn-Wilsonville School District is committed to creating and maintaining safe, secure facilities for students, staff and patrons as a partnership with our community, neighboring school districts, area law enforcement and emergency responders. Our schools have been assessed for safety related corrections and as identified the following specific improvements for each unique school facility.

- Building Communication Systems
- School Entrance Security
- Door Hardware and Locking
- Safe Classroom Accommodations
- School-grounds Exterior Security Measures
- Limited Video Surveillance
- Lighting and Controls

### Recent Activities:

- Eiert & Associates conducted safety and security assessments district-wide.
- Building communication system enhancements at several schools.
- Safety and security site assessment reports have been received.

### Upcoming Activities:

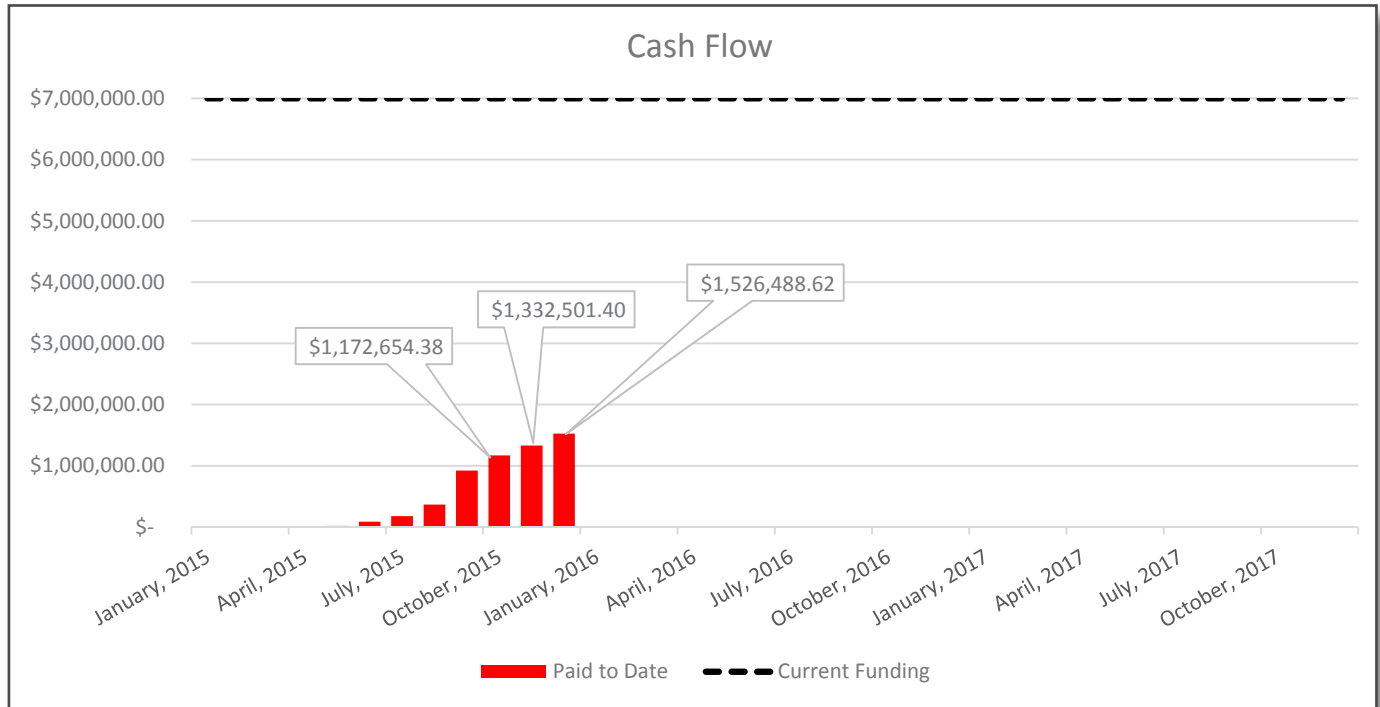
- Continue review of Federal and State law and policy around school safety.
- Update district emergency response plans.
- Continue safety reviews of new project designs.



## DISTRICT-WIDE IMPROVEMENTS

Q4 2015

This category of projects represents work at all district sites that has been identified over time as improvements that response to life-cycle replacement, upgrades required by code, changes in instructional models, growth in activity participation and obsolescence. Active and upcoming projects under this bond component will be listed below.



### 2015 Improvements Projects:

#### 15008 – Drainage & Play Equipment @ RR, ST, WM

School	Task	Status
Rosemont Ridge	Baseball field drainage	Complete
Rosemont Ridge	Play equipment	Purchased & received
Stafford Primary	Playground drainage	Summer 2016
Stafford Primary	Play equipment	Purchased & received
Willamette Primary	Play equipment	Purchased & received

#### Notes:

The play equipment was purchased and delivered to the district. The project will be bid in March or April with a planned construction starting in June.



## DISTRICT-WIDE IMPROVEMENTS

Q4 2015

### 15010 – Painting @ ST, WM, WHS

School	Task	Status
Stafford	Exterior painting	Summer 2016
Willamette	Interior corridor painting	Summer 2016
Wilsonville	Select stadium handrail painting	Summer 2016

#### **Project Status:**

Public bid process held, low bid contractor refused to sign contract. The project will be bid again in March or April for completion this summer.

### 15011 – Select Restroom Renovation @ BC, ST, WLHS

School	Task	Status
Boeckman Creek	Select Restroom Renovation	Complete
Stafford	Select Restroom Renovation	Complete
West Linn	Select Restroom Renovation	Summer 2016 or 2017

#### **Project Status:**

Restroom renovations at Boeckman Creek and Stafford were completed in-house by the district this summer.

The work at West Linn High School will require design assistance and a contractor and will occur summer 2016 or 2017.

### 15012 – Robotics Renovation @ WHS

School	Task	Status
Wilsonville	Robotics Garage Renovation	Complete

#### **Project Status:**

The project is complete.

**Before:**



**After:**





## DISTRICT-WIDE IMPROVEMENTS

Q4 2015

### 15015 – Concession/Restroom/Team Room @ RR

School	Task	Status
Rosement Ridge	Concession/Restroom/Team Room	Active

#### **Project Status:**

The project is currently in construction and is on schedule for completion in February.



# CONSTRUCTION TERMINOLOGY

Q4 2015

## **Design Phases:**

Education Specification Group Planning: This phase involves activities that focus on research and preliminary concept studies to develop a course for the project design to follow. Examples of activities include the Design Team developing an understanding of the District and needs of the project through:

Confirmation of existing conditions, preliminary concepts and visioning, Lessons learned, and refinement of project scope, space requirements, schedule and budgets.

The role of the Ed Spec Group is to provide input to the Design and Management Team during early Design phases on projects that involve significant changes to the existing facilities or are new construction. The Group is made up of both internal and external stakeholders such as Teachers, Parents, and community members.

Schematic Design (SD): Schematic Design centers around refinement of design options developed from conceptual ideas into preliminary designs. During SD, preliminary design elements are developed include general building orientation, gross square footage and initial internal configurations, and overall project scope continues to be refined.

Design Development (DD): The firming up of the design takes place during the DD phase. Major systems are thoroughly designed/engineered, internal elevations are developed, coordination between building systems and components are coordinated, major conflicts are identified and resolved, a detail cost estimate is developed, and schedule evaluations are conducted.

Construction Documents (CD): The purpose of CDs is to finalize all the technical aspects of the design. Major design changes should be complete at this point and the Design Team should be focused on the details in order to ensure conflicts in the design are resolved before the project is put out for public bidding.

## **Contractor Selection Methods:**

Prequalification: Qualifications based selection is a method that allows a public agency to pre-select qualified contractors that will be allowed to participate in the competitive bidding process for a project. A qualifications based process will provide a select pool of bidders that demonstrate all the key qualities the District feels are critical to a successful contractor, such a K-12 experience, knowledgeable and skilled site staff and solid background in working on intricate and complex projects. This pool of bidders would then compete in a traditional bid process to select the firm to build the project.

Design-Bid-Build: The preferred procurement method of the District is a traditional method to select a general contractor. The contractor with the lowest complete bid will be awarded the project.

## **Permit Phases:**

Permitting: The permitting phase of a project begins early in the project design and continues into construction.

Land Use Process: Major developments must go through a land use process. This phase of permitting typically involves a submittal of a planned development to a governing body such as a development review board through a land use or conditional use permit application. During this process the community is encouraged to comment in public session and staff creates recommendations and conditions for the approval.

General Building Permit: Following the land use process, the building permit will include compliance conditions received and accepted during land use process. The building design is reviewed for compliance with city building code and a permit is issued when comments have been addressed and the design approved.