



**PORTLAND PUBLIC SCHOOLS**  
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**Date:** January 14, 2022  
**To:** Facilities and Operations Committee  
**From:** Marina Cresswell, Senior Director, Office of School Modernization  
**Subject:** OSM Quarterly Report

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**BACKGROUND**

In November 2012, May 2017, and November 2020, voters approved general obligation bonds to complete capital improvement projects for Portland Public Schools. The District's Office of School Modernization reports to a citizen Bond Accountability Committee (BAC) on a minimum quarterly basis. Currently the BAC meets every two months.

Bond reporting provided at each BAC meeting include: program administration financial, equity and performance updates; performance audit recommendation updates; and financial progress of the 2017 Bond funds set aside for Health & Safety improvements. Project status updates, including financials, equity, schedule and progress notes, are provided at each meeting on a rotating basis. Special presentations or topics for discussion are also scheduled for each meeting based on BAC input.

**BAC MEETINGS AND MATERIALS FOR THIS REPORT**

The provided documentation for this OSM Quarterly Report includes materials provided to the BAC at the September 29, 2021, meeting and the December 13, 2021, meeting. The initially scheduled November 2021 meeting was rescheduled to December 2021 due to the combined Facilities & Operations Committee and Bond Accountability Committee meeting taking place in November.

Status updates for the 2012, 2017 and 2020 Modernization projects (excluding the Benson/MPG Modernization project) were provided at the September 29, 2021, meeting, along with a review of the BAC Charter and a discussion of BAC meeting and report formats. An update on the Benson/MPG Modernization project and a presentation on the Performance Audit Year 4 Report were provided to a combined Facilities & Operations Committee and Bond Accountability Committee on November 17, 2021. Project status updates for the 2017 Health & Safety and 2020 Infrastructure projects were provided at the December 13, 2021, meeting. The December meeting agenda also included time for the BAC to discuss the Benson /MPG Modernization presentation and the Performance Audit Year 4 Report presentation from the November Facilities & Operations Committee.

**OSM QUARTERLY UPDATE**

The bond program continues to make progress planning, designing and completing capital improvements. The attached documentation provides an overview of recent accomplishments and current status. The current combined (2012/2017/2020) program budget is \$2.7 billion. Roughly \$1.2 billion of that has been spent to date.

The 2012 Bond program is winding to a close and all work noted in the 2012 ballot has been completed, including Franklin HS; Roosevelt HS; Grant HS; Faubion K-8; and facility improvements including roofs, ADA, and science classrooms. Additional projects not considered when the 2012 bond was passed included RHS Phase 4 and the Grant Upper Field Improvements. The bond funding was sufficient to complete not only the anticipated scope of the measure, but also most costs of these two additional projects. In addition, the 2012 bond passed with targeted HS enrollment of 1350 students and high school target size of 225,000 square feet. FHS, GHS, and RHS were all increased in size after the passage of the bond, to target 1700 students at 295,000 square feet. The increases at FHS, GHS and RHS resulted in approximately 150,000 square feet of additional space that was still able to be funded within the 2012 bond funding. All remaining funds are expected to go towards the completion of the Grant Upper Fields Improvement project, as the final project of the 2012 Bond.

The 2017 Bond program has spent roughly 66% of its now \$892 million budget. Teams are finishing addressing any move-in issues from the McDaniel HS and Kellogg MS modernization projects that opened to students in Fall 2021. Teams are also working on closing out contracts and budgets for those projects, but both projects are anticipated to close under budget and return funds to the bond program. The Lincoln HS modernization, currently under construction, remains on schedule and on budget. The Benson and MPG modernization project is under early construction while finalizing the GMP amendment. 2017 Health and Safety projects to address asbestos, lead paint, security and water quality continue forward. Contracts and budgets are being closed out on roofing, fire alarms, radon and accessibility projects to allow staff to determine how much funding remains in each of those categories.

The 2020 Bond program has been moving forward with technology and curriculum projects, as well as urgent or grant-matching needs in roofing, mechanical, seismic and capacity. Project scope refinement and cost estimating is underway for ADA and SPED projects. The Request For Proposals for master planning and design of the Jefferson Modernization was issued in late November, proposals have been received, and the process is now in the evaluation/interview phase. OSM is working with a local recruiting firm to bring on a Senior Project Manager to lead the project team, which consists of a mix of existing and new OSM staff.

#### ATTACHMENTS

##### *BAC Meeting – September 29, 2021:*

- BAC Agenda\_09 29 2021
- BAC Presentation\_09 29 2021
- BAC Status Report\_Bond Program Administration\_09 29 2021
- BAC Status Report\_Grant Upper Field\_09 29 2021
- BAC Status Report\_Kellogg MS Mod\_09 29 2021
- BAC Status Report\_Lincoln HS Mod\_09 29 2021
- BAC Status Report\_McDaniel HS Mod\_09 29 2021
- BAC Status Report\_RHS Ph IV\_09 29 2021
- Health Safety Funding Allocation\_09 29 2021
- Performance Audit Tracker\_BAC Report\_09 29 2021

##### *BAC Meeting – December 13, 2021:*

- BAC Agenda\_12 13 2021
- BAC Business Equity Utilization Data Constraints
- BAC Health Safety Funding Allocation\_12 13 2021
- BAC Performance Audit Tracker\_12 13 2021
- BAC Presentation\_12 13 2021
- BAC Status Report\_2017 HS\_Accessibility\_12 13 2021
- BAC Status Report\_2017 HS\_Asbestos\_12 13 2021
- BAC Status Report\_2017 HS\_Lead Paint\_12 13 2021
- BAC Status Report\_2017 HS\_Roof\_12 13 2021
- BAC Status Report\_2017 HS\_Security\_12 13 2021
- BAC Status Report\_2017 HS\_WaterQuality\_12 13 2021
- BAC Status Report\_2020 Mechanical\_12 13 2021
- BAC Status Report\_2020 Roof\_12 13 2021
- BAC Status Report\_2020 Seismic\_12 13 2021
- BAC Status Report\_Bond Program Administration\_12 13 2021
- PPS Year 3 FINAL Report 11.12.2021