

Facilities and Operations Committee
Meeting
Wednesday, June 15, 2022 4:00 PM

Dr. Matthew Prophet Education Center -
Windows Cafeteria / Conference Room (Floor
2)
501 N. Dixon St.
Portland, OR 97227

Agenda

1. Tubman Middle School Update
2. Bond Accountability Committee (BAC) Update
3. Office of School Modernization (OSM) Update
4. Supplemental Transportation Plan Update Overview
5. Public Comment (Topic must pertain to the agenda) To sign-up for public comment
email PublicComment@pps.net
or call 503-916-3741
6. Adjourn

HARRIET TUBMAN MIDDLE SCHOOL

(RE)SITING: DUE DILIGENCE V03



2022 JUNE 14

INTRODUCTION

This study is intended to provide a common reference point for all Harriet Tubman Middle School stakeholders. The information in this report supports decision making and, as research progresses, this document will be updated to reflect current thinking.

Volume 3 provides further analysis of several sites included in previous volumes and introduces new potential site options. Previously considered sites are located in Appendix A. Sites included for analysis come from a variety of sources, including staff research and community suggestions.

BACKGROUND

Over the course of decades, the Historic Albina neighborhood — the heart of Oregon’s historic Black community — has experienced harm caused by the construction and presence of the I-5 freeway. Since Black families had their homes and businesses demolished to make way for construction of the freeway and other “urban renewal” projects nearly fifty years ago, the air pollution and increased traffic associated with the freeway have negatively impacted the health of neighborhood residents and their quality of life. The resulting displacement and disinvestment in the Albina neighborhood is part of our community’s shared history.

The Federal-Aid Highway Act of 1956 originally provided funds to construct the interstate, in the process demolishing several hundred housing units and constructing the freeway immediately adjacent to what was then Eliot Elementary, which had opened in 1952. The creation of Harriet Tubman Middle School in the early 1980s at the former Eliot School site has historical significance, as it played a pivotal role in the struggle over school desegregation and racist busing policies in Portland during the 1960s-1980s.

Harriet Tubman has served PPS students in the Albina neighborhood since the early ‘80s, and then in 2018, reopened as a middle school as part of a district-wide Middle School Framework to provide students with a more comprehensive and equitable middle school experience and better preparation for high school. For this framework to be successful long-term, it is essential that students are educated in a building that is not negatively impacted by significant adjacent project construction and longer-term negative impacts from unhealthy ambient air quality, noise, and vibrations.

The location of the freeway directly adjacent to the school has created enduring environmental impacts. Today the exterior area of Harriet Tubman is functionally unusable for school purposes. As currently designed, the proposed I-5 Rose Quarter Improvement Project would further cut into the Harriet Tubman Middle School site, threatening to worsen the environmental situation and negative health impacts, both during construction and over the long term.

The image below is of the existing Harriet Tubman Middle School site and demonstrates the current proximity of the interstate to the school. The interstate expansion will exacerbate existing environmental hardships and threaten the western edge of the site.



SCHEDULE

Due to the proximity to the site and location of construction access roads, work on the Eliot Viaduct will directly impact the safety and learning of students at Harriet Tubman Middle School. Prior schedules provided by ODOT showed this portion of work beginning in September of 2027; however, ODOT has accelerated the timeline for this work, which has a direct impact on the district's timeline to relocate Harriet Tubman. Recent construction schedules provided to the district from ODOT indicate the Eliot Viaduct work will begin in September of 2026, suggesting the Harriet Tubman students must vacate the current location by August 2026.

The district can use our recently constructed Kellogg Middle School to infer the necessary duration to build a middle school. Kellogg Middle School opened in August of 2021 after four years of planning, design, and construction. The process began in May 2017 with procuring architectural and engineer services. Planning, design, and permitting took approximately two years; construction also took two years.

Comparing Kellogg with the development proposal described above, it's worth noting a number of asymmetries between the processes. First, the district already owned the parcel for Kellogg Middle School. Not all sites currently under consideration are within the district's control. In these cases, the district must negotiate with the current property owner for sale, lease, or trade for the land. If the current property owner is another government agency, there will likely be a public process around the property purchase. District staff estimate a minimum of six months would be required for property negotiations.

To further address potential differences between Kellogg and the current study, the existing zoning for Kellogg allowed school use through a conditional land

use process — a familiar and predictable administrative process for granting land-use approval for schools. Some parcels currently under consideration do not allow school use. These parcels will require comprehensive plan amendments — a process that requires City Council approval. A comprehensive plan amendment is in no way guaranteed. If the district pursues a parcel that does not allow school use, it does so at risk.

Returning to the inferences we can make from the assumed I-5 construction schedule and the timeline from Kellogg Middle School, in order to relocate Harriet Tubman before Eliot Viaduct work begins (based on ODOT's most recent schedule), the district would have needed to identify and begin procurement for design services by August 2021. Additionally, lessons learned from previous projects, including Kellogg, suggest additional time for procurement and planning are prudent, to say nothing of time for scheduling contingencies to address unexpected or unknown site conditions, supply-chain issues, or labor shortages.

Given the accelerated timeline of Eliot Viaduct construction, it is necessary to make use of a swing site, or temporary location, for Harriet Tubman Middle School, while design decisions, community engagement, site selection, and construction are completed for a targeted fall 2027 opening of the permanent school site. This will make it possible to conduct school away from the Eliot Viaduct construction that is slated to occur during the 2026-27 school year. The District will identify potential swing sites that are District-owned and will be available before fall of 2026.

Temporarily hosting school functions in an offsite location is common for capital improvements however temporary homes do not allow for an ideal teaching and learning environment. In order to minimize the time Tubman students, staff and family will need to be housed in a temporary location, the District must identify the final relocation option as soon as possible. Extended delay in identifying and procuring the new site will impact the move in schedule.

I-5 IMPACT SUMMARY

This summary is based on the latest information available. The I-5 Rose Quarter Improvement Project is in the design phase. Precise schedule details are not yet available and subject to change.

2023-24 SCHOOL YEAR

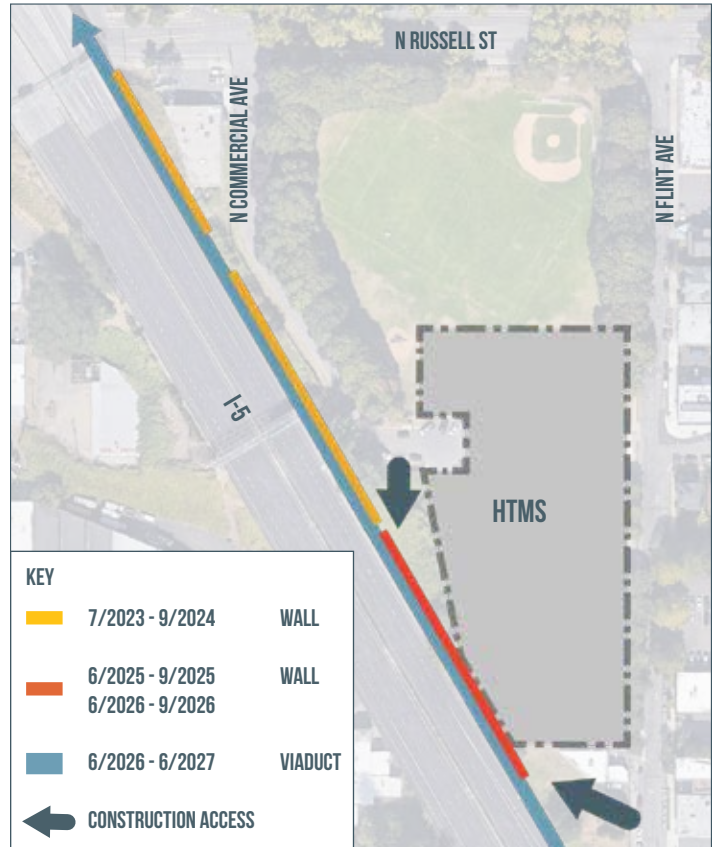
Monday-Friday daytime hours. Work will occur during the school year, starting in early 2024, off of PPS property but close to Tubman. Start to build walls from Russell St and south, to the area west of the gymnasium. Impacts include construction access utilizing Commercial Ave.

2024 SUMMER

Monday-Friday daytime hours. Potential relocation of underground utilities where the new retaining wall is going, west of Tubman. ODOT may need to access the back part of the Tubman property for this work during Summer 2024. This is in the preliminary stage of investigation and not yet confirmed to be necessary. If there are utilities requiring relocation, these utilities would be serving our buildings, so we would expect interruptions of service. Continue work on walls from Russell St to the area west of the gymnasium. Commercial Ave used for ODOT access. Does not require Tubman property staging or access.

2025 SUMMER ONLY

24/7 schedule planned. Using the back side of Tubman for staging and work. ODOT will create their access on ODOT Right Of Way (Tillamook Ave to PPS property line) and will also use access from Commercial Ave. Staging of equipment and ODOT access will take up the north, south and west sides of school. Remove fencing and pavement. Shaft drilling to create



retaining wall, west of the main school building. Continue work on walls from Russell St south, as well as the noise wall that goes on top of the new retaining wall. Temporary paving and fencing will be restored before the start of the school year.

2026 SUMMER ONLY

24/7 schedule possible. Using the back side of Tubman for staging and work. Remove temporary paving and fencing. Finish building the retaining wall. Complete building of the noise wall on top of the retaining wall. Paving and fencing will be restored before the start of the school year

2026-27 SCHOOL YEAR

Monday-Friday daytime hours. Construction of the fascia for retaining wall. Construction of the Eliot Viaduct, the area at current freeway level that is west of the Tubman property. Impacts include construction access utilizing Commercial Ave.

ELIOT VIADUCT

ODOT has informed the district that they have concluded Harriet Tubman staff, students, and district operations will not be harmed by impacts of Eliot Viaduct construction when school is in session. This conclusion does not align with the district's assessment of impacts. District staff have requested specific technical details from ODOT that validate these statements, including current measurements, estimated peak measurements during construction, and anticipated measurements at the time of construction completion for:

- » air quality
- » noise
- » dust/airborne pollution
- » vibration
- » traffic flow and congestion during dropoff and pickup
- » access and circulation impacts for staff, students, families and school buses
- » equipment and construction activity impacts including cranes and swing radius
- » the construction impact upon air filtration equipment that was procured and installed during HTMS' 2017/18 HVAC upgrades

ODOT's responses to information requests have been mixed at best and largely evasive. Specific data on forecasted noise or air measurements (for example) remain unanswered. ODOT has not provided sufficient information to conclude construction of the Eliot Viaduct will not have material negative impacts to staff and students. Therefore the district continues to assert that the impact of Eliot Viaduct construction during school hours will be material and consequential, and has the potential to bring harm to staff and students occupying the site.

COMMUNITY ENGAGEMENT

We recognize the need to collectively build support and vision for the future of Harriet Tubman school. Empowering students, staff, and community members to collaborate with Portland Public Schools will help create a recommendation on a future site for Harriet Tubman Middle School, and elevate essential needs that can be honored in future educational design planning impacting the Albina community.

The site relocation selection process will be joint with the broader work around the Center for Black Student Excellence, Harriet Tubman Site Selection Committee, and the Jefferson Modernization, which includes the modernization of Jefferson High School. All of which are part of the district's efforts and commitment to Racial Equity and Social Justice as outlined in our PPS strategic Plan - Forward Together.

The design of this engagement process endeavors to engage a diverse set of stakeholders who will make a relocation site selection recommendation to the PPS Executive Sponsors who will make the recommendation to the PPS School Board. Through late fall, PPS staff will hold a series of engagement meetings with the identified stakeholders with the goal of building consensus around a potential future site for Harriet Tubman Middle School based on the input and thought partnership of those stakeholders. Through relationship building and grounding on the context and challenges, stakeholders will utilize a common site selection criteria.

STAKEHOLDER GROUPS TO BE ENGAGED

PPS Students- Harriet Tubman and Feeder Schools

Affinity Groups
Directed Outreach

PPS Parents - Harriet Tubman and Feeder Schools

King PTA
Harriet Tubman PTA
Sabin PTA
Irvington PTA
Directed Outreach

PPS Staff - Harriet Tubman and Feeder Schools

Principals
Teachers
All staff
Retired staff

Black Community Leaders

Albina Vision Trust
Directed Outreach

RESJ Partnership Organizations - Black Led and with staff at Harriet Tubman and Feeder Schools

Self Enhancement Inc
Coalition of Black Men
Black Parent Initiative
REAP
Kairos
Maurice Lucas Foundation
Urban League

HARRIET TUBMAN RELOCATION PROCESS: COMPREHENSIVE CALENDAR

| EMPATHIZE (Staff & Community Driven) | | DEFINE, IDEATE & PROTOTYPE (Community Driven) | TEST (Staff Recommendation) |
|--|---|--|---|
| <p>Input sessions, community conversations, and relationship-building with stakeholders in the Albina school neighborhood allowed us to hear initial input on sites in the 2nd volume of the due diligence report. Early input sessions shared background information on the project, ODOT timeline, and goals for the relocation.</p> | | <p>Collective visioning, support building, and clarity continues to be discovered for the future of HTMS. Community members brainstorm possibilities for future HTMS sites and get grounding on the site selection criteria to be used for site selection.</p> <p>Community members will be encouraged to fill out a google form to record site selections that will be summarized and discussed in future</p> <p>Community input is summarized, and PPS staff will facilitate community conversations to review summary of community scored site selection criteria form.</p> | <p>Based on the summarized stakeholder input and the community discussion session, Executive Sponsors will finalize a recommendation based on the input of the community engagement process on future HTMS sites and present recommendations to the PPS School Board.</p> |
| <p>March 10 - May 24 10 community and student meetings</p> | <p>June 9th Late June Joint Meeting: Values and 4 Locations, Fall Engagement Timeline</p> | <p>Mid August Joint Meeting on Harriet Tubman #2: Scenario Planning on Locations</p> <p>Late August Community Session</p> <p>Mid September Community Session</p> <p>Joint Meeting on Harriet Tubman #3: In-depth analysis and site evaluation</p> <p>School Board Business and Operations Committee Update</p> | <p>Early October Complete Community Engagement</p> <p>Joint Meeting on Harriet Tubman #4: Recommend final site selection to staff</p> <p>Board of Education votes on Jefferson Master Plan</p> <p>Board of Education votes on site selection of Harriet Tubman</p> <p>Early- November School Board Business and Operations Committee Update</p> |

ENVIRONMENTAL REVIEW PROCESS

To date, only cursory outdoor air sampling for particulate matter has been conducted at the BESC and PBOT sites. The cursory sampling ruled out any elevated particulate matter at the time of the sampling only. Any site selected for further analysis would be subject to an EPA-defined Phase I and Phase II Environmental Site Assessment.

A Phase I Environmental Site Assessment will research, catalog, and analyze:

- » Current and historical ownership and activities on the property
- » Existing environmental information related to the property, such as the past or current presence of underground storage tanks, utility lines, etc.
- » Influences from surrounding properties

A Phase II Environmental Site Assessment, when determined to be needed, will include:

- » Environmental sampling (air, soil, water)
- » Geotechnical surveys

FUNDING

During the 2022 Legislative Session the legislature approved \$120 million in general funds for the District to relocate Harriet Tubman Middle School.

If the funding provided by the State is insufficient to cover the cost of relocation, the District will need to identify other capital funding sources to complete the relocation.

COST ESTIMATES

A cost estimate has been prepared for the purchase of property and construction of a new middle school. Original cost estimates were developed in late 2021 and provided to the State to foster discussion regarding support for Tubman relocation. The 2022 State Investment Request is included in Appendix B. One important thing to note with this cost information is that because no particular site location has been determined yet, it carries with it some uncertainty.

- » **Land** - Purchase of new property estimates are based on current market conditions and will vary widely depending on zoning, location and current site conditions. Costs for land vary widely depending upon the site. Several properties PPS owns, which result in no cost. For sites that would require a purchase for Land, we assumed a Low cost of \$5M/Acre and a High of \$10M/Acre.
- » **Hard Costs** - Hard costs are defined as physical costs associated with construction of a project. The estimates are based on an assumed building area based on PPS' education specification and a dollar per square foot cost range provided by professional construction cost estimators Rider Levett Bucknall (RLB). Low range is based on \$460/SF, High Range is up to \$540/SF. Demolition costs at \$25/SF, if applicable, are additive to these Hard Costs. The \$25/SF cost estimate was also provided by RLB. Because no site has been identified, this cost category carries with it significant unknowns including the area of the site, the final size of the building(s), new construction versus renovation, and more. Below is a sample of hard cost estimates.

| Building SF | Cost per SF | Hard Cost |
|-------------|-------------|--------------|
| 120,000 | \$460 | \$55,200,000 |
| 120,000 | \$540 | \$64,800,000 |

- » **Soft Costs** - Soft costs include indirect project expenses including (but not limited to) architecture and engineering fees, land use

and building, permitting, testing & inspection, surveying, and other consultants. The estimates are based on recent PPS capital projects.

- » **FF&E** - Includes costs for new furniture, fixtures, and equipment/technology to outfit a new middle school. The estimates are based on recent PPS capital projects.
- » **Site Development** - Cost includes estimates necessary to complete all on-site and off-site improvements including (but not limited to) clearing and grading, parking and circulation, field improvements, new utility infrastructure, and street and other ROW improvements that may be required. Because no site has been selected, this cost category carries with it many significant unknowns. The estimates are based on recent PPS capital projects. The cost percentage ranged from 10% to 18% depending upon the perceived risks for each site.
- » **Swing Site** - It was assumed, based on ODOT's original schedule, that a swing site was not going to be needed. However, ODOT's schedule has now been accelerated, and a swing site looks to be more of a necessity. Swing site costs are included in the cost ranges provided below.
- » **Administration** - Includes costs associated with management of the project including owner's representation services, construction management services, insurance, and other related costs. The estimates are based on recent PPS capital projects.
- » **Contingency** - 15% contingency is held for unanticipated construction costs.
- » **Escalation** - The escalation cost information was obtained from Rider Levett Bucknall (RLB), and it varies year over year based upon projected inflation rates. Current forecasts estimate 7% - 8% annual cost increases across all trades. RLB

calculated the comparative cost increase in Portland from January 2021 to January 2022 at 8.40%. Given the current volatile inflationary environment, there is a lack of confidence at accurately predicting future escalation rates. The escalation rate(s) are projected to the approximate midpoint of construction. There are many variables and decisions that have yet to be made which affect the overall schedule for this work. The below table illustrates the compounding effects of annual cost escalation.

| Escalation Rates | | | | | |
|------------------|-------|-------|-------|-------|-------|
| 2022 | 2023 | 2024 | 2025 | 2026 | 2027 |
| N/A | 8.0% | 7.0% | 6.0% | 5.0% | 4.0% |
| \$100 | \$108 | \$116 | \$122 | \$129 | \$134 |

- » **State Investment:** It's important to understand the State of Oregon decided to fund the project below the bottom end of the cost estimate range as outlined in the State Investment Request document the District provided to the State. This document is included in the Appendix B, and is linked here: [STATE INVESTMENT REQUEST](#).

PROGRAM REQUIREMENTS

MIDDLE SCHOOL EDUCATIONAL SPECIFICATIONS

Created in 2014, the Portland Public Schools Educational Specifications (Ed Spec) represent a foundation on which planning and design work can begin; it outlines desired building characteristics for all district schools. The intent of the Ed Spec is to provide spaces for 21st-century teaching to occur while providing flexibility to adapt to future changes. The Ed Spec area program identifies the quantity and size of spaces within a middle school needed to deliver the district's education program. This study interprets Ed Spec to meet site-specific constraints and program needs.

EXISTING MIDDLE SCHOOLS: BUILDING & SITE DATA

| SITE | SITE AREA (ACRES) | BUILT AREA (GSF) | CLASSROOM COUNT |
|-----------------|----------------------|---------------------|--------------------|
| BEAUMONT | 5.7 | 91,294 | 34 |
| DA VINCI | 10 | 88,659 | 25 |
| GEORGE | 7.3 | 76,142 | 31 |
| GRAY | 13.2 | 74,614 | 26 |
| HARRISON PARK | 5.4 | 110,775 | 39 |
| HOSFORD | 6.7 | 88,532 | 32 |
| JACKSON | 36.4 | 219,281 | 40 |
| KELLOGG | 5.8 | 108,110 | 33 |
| LANE | 9.1 | 94,753 | 39 |
| MT. TABOR | 7.4 | 79,477 | 31 |
| OCKLEY GREEN | 5.2 | 74,018 | 31 |
| ROSEWAY HEIGHTS | 8.5 | 103,610 | 39 |
| SELLWOOD | 4.8 | 87,364 | 30 |
| TUBMAN | 3.1 | 87,610 | 33 |
| WEST SYLVAN | 13.6 | 108,187 | 40 |

ENROLLMENT FORECASTS

Enrollment forecasts are used, in part, to determine whether the district will need to add or modify facility space to meet school program or configuration needs. Student enrollment forecasts, combined with building capacity and utilization, provide a framework for facility needs to serve Portland Public Schools' graduate portrait.

The enrollment forecasts presented below were prepared by the Portland State University Population Research Center for Portland Public Schools. These data are based on recent enrollment numbers (October 2020 and

October 2021) and forecast through 2037 for K-5 and Middle School configurations, and the overall district. These data are preliminary; final forecasts are expected for individual schools by March of this year and will forecast enrollment to 2032.

The preliminary 15-year enrollment forecast integrates district enrollment trends with local area population, enrollment, and housing trends. This information is intended to be used as a school planning tool and a basis for community discussions about future school facility needs.

ENROLLMENT CHANGE 2021-22 THROUGH 2036-37 SUMMARY

| CONFIGURATION | 2021-22 ENROLLMENT (ACTUAL) | 2036-37 (PRELIMINARY FORECASTS) | CHANGE | |
|---------------|-----------------------------|---------------------------------|--------|------|
| K-5 | 20,324 | 19,094 | 1,230 | -6% |
| 6-8 | 10,345 | 8,603 | 1,742 | -17% |
| K-12 | 45,005 | 39,409 | 5,596 | -12% |

PRELIMINARY ENROLLMENT FORECASTS PROVIDED BY PSU POPULATION RESEARCH CENTER, JANUARY 2022

| NAME | PROGRAM | 2019-20 (ACTUAL) | | 2020-21 (ACTUAL) | | 2021-22 (ACTUAL) | | 2022-23 (PRELIMINARY FORECAST) | |
|----------------|--------------|------------------|-------------|------------------|-------------|------------------|-------------|--------------------------------|-------------|
| | | ENROLLMENT | UTILIZATION | ENROLLMENT | UTILIZATION | ENROLLMENT | UTILIZATION | ENROLLMENT | UTILIZATION |
| BOISE-ELIOT | NEIGHBORHOOD | 325 | 50% | 327 | 50% | 321 | 49% | 325 | 50% |
| IRVINGTON | NEIGHBORHOOD | 325 | 59% | 320 | 58% | 248 | 45% | 242 | 44% |
| MLK JR | MANDARIN | 166 | - | 181 | - | 169 | - | 167 | - |
| | NEIGHBORHOOD | 155 | - | 138 | - | 128 | - | 146 | - |
| | TOTAL | 321 | 51% | 319 | 50% | 297 | 47% | 313 | 49% |
| SABIN | NEIGHBORHOOD | 418 | 69% | 360 | 59% | 340 | 56% | 340 | 56% |
| HARRIET TUBMAN | MANDARIN | 13 | - | 26 | - | 35 | - | 34 | - |
| | NEIGHBORHOOD | 417 | - | 417 | - | 353 | - | 340 | - |
| | TOTAL | 430 | 59% | 443 | 61% | 388 | 53% | 374 | 51% |
| JEFFERSON | NEIGHBORHOOD | 641 | 35% | 620 | 34% | 588 | 32% | 607 | 33% |

The nature of forecasting requires some level of speculation, so questions around data integrity are warranted; however, previous forecasts offer a way to validate predictions because of the methodological consistency used by the Population Research Center. When measuring the deviation between forecasted and actual enrollment, estimates from 2010 through the end of 2019 (pre-pandemic) had an error rate of less than 2%, often below 1%.

Primary data sources used to prepare these forecasts include historic enrollments through 2021-22, U.S. Census Bureau 2000 and 2010 Decennial Censuses and 2015 to 2019 American Community Survey, birth data from the Oregon Center for Health Statistics, and housing development information from the City of Portland and Metro.

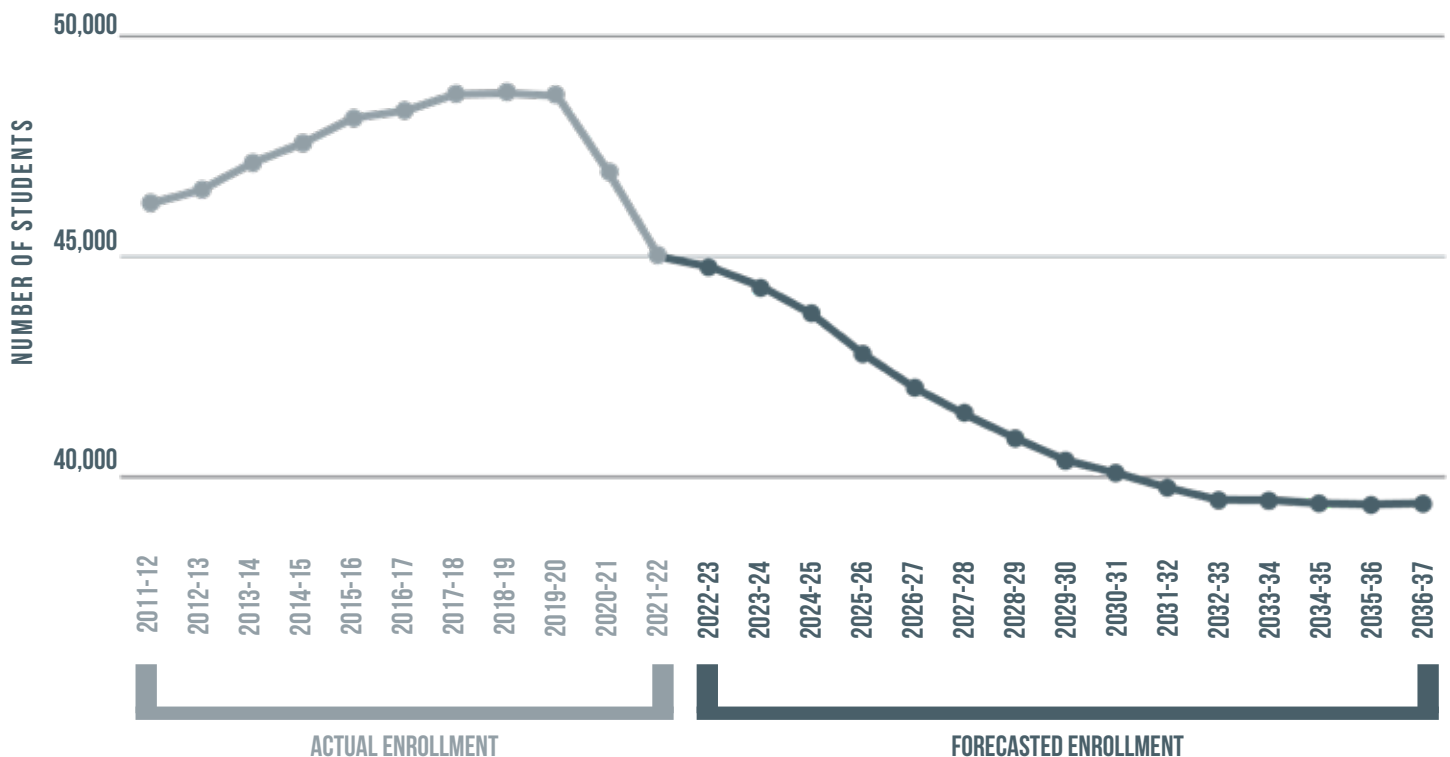
DISTRICT ENROLLMENT FORECAST

The COVID-19 pandemic significantly shifted enrollment for the 2020-2021 school year. The lasting impact of the pandemic on enrollment remains to be seen but the enrollment decrease for the 2021-2022 school year was commensurate with the decrease from the previous year, suggesting the pandemic will have a durable effect on enrollment.

In fall 2021, the district enrolled 45,005 students in grades K-12, a decrease of 1,932 students from fall 2020. For comparison, the pandemic-related enrollment decline seen in fall 2020 was 1,716.

The most significant decline in the past two years was seen in the lower grades. From 2019-2020 to 2020-2021

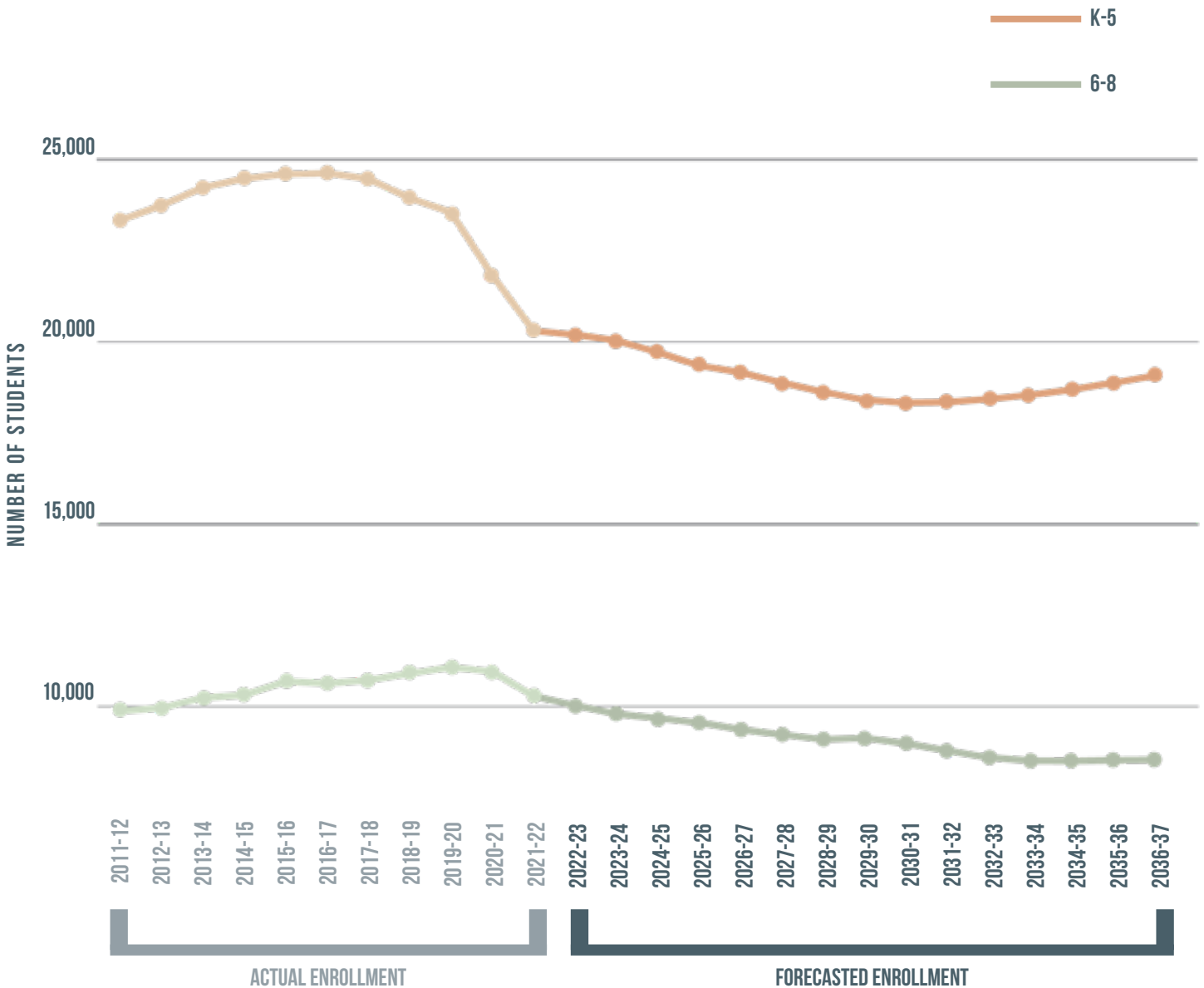
PRELIMINARY DISTRICT ENROLLMENT FORECASTS



K-2 enrollment declined eight percent. From 2020-2021 to 2021-2022 the enrollment decline was similar at six percent. Demographers with the Portland State University Population Research Center anticipate that enrollment will continue to decline, albeit not as sharply, through the forecast range. In addition to the pandemic, declining birth rates and slower net migration to the Portland region play a significant part in the enrollment decline.

Overall district enrollment is projected to fall throughout the forecast range. By the end of the 15-year forecast in 2036-37, projected enrollment is 39,409 – more than 9000 students below its pre-pandemic 2019-20 level.

PRELIMINARY CONFIGURATION ENROLLMENT FORECASTS



CRITERIA & OPPORTUNITY SITES

The purpose of this section is to facilitate dialogue around both the selection criteria and viability of each site as a potential new site for Harriet Tubman Middle School. The intent is to provide a common reference point for all stakeholders. As this study progresses, this document will be updated to reflect current considerations, including community input.

As a starting place, district staff have defined an initial set of criteria to help rank each study site. These criteria are not exhaustive. Instead, they serve as an initial filter to narrow the field of potential sites.

The purpose of these criteria is to:

- » Structure dialogue around priorities
- » Provide a shared reference point for stakeholders to express their values
- » Discover where interests converge
- » Provide transparency to the decision-making process
- » Balance variables across stakeholders

District staff will seek input from the community on the criteria on an ongoing basis. These criteria will evolve with input from stakeholders at this time. The district will collaborate with the community to apply these criteria until a narrow set of sites is identified.

The following list of sites documented here are the main viable candidates for a new location for Harriet Tubman. This list is not exhaustive; some sites have been eliminated prior to the issuance of this draft. Our collective work is to narrow the field of potential sites to better focus district resources for more involved studies.

The criteria discussed for each site are outlined below. To be sure, these criteria are not exhaustive. Instead,

they serve as an initial filter to narrow the field of potential sites to better focus district resources for more involved studies.

COMMUNITY CONSIDERATIONS

Student and neighborhood demographics: The ideal site will take into consideration both the current and historic racial demographics of students and surrounding neighborhood. Staff and community will evaluate the risk of a proposed site exacerbating neighborhood gentrification and displacement for communities of color. To evaluate this risk, staff and community will specifically review the demographic impact of each proposed site to ensure that current concentrations of students of color are not lost.

Neighborhood Accessibility: The ideal site will take into consideration the ability of families of color to access the neighborhood and school site proposed. Staff and community will evaluate housing affordability, neighborhood and community amenities to ensure that students and families of color will be able to access the proposed site.

Tubman Catchment Boundary: Feedback from stakeholders, community and staff have consistently raised concerns about permanently relocating Tubman to outside the existing catchment area. Siting Tubman outside the current boundary raises fundamental questions regarding likely future enrollment and boundary changes that the District cannot foretell. Lacking the ability to accurately predict future changes is a significant concern for many stakeholders. Additionally relocating outside the current catchment would place all, or the majority of, Tubman students outside reasonable walking distance and necessitate

busing of nearly the entire school population. The impression of whole program bussing and the operational implications of this effort are material and problematic to many community members. Based upon this feedback, Staff do not recommend relocating Tubman outside the existing catchment boundary.

LOCATION

Based on feedback from the community, the site must be located within the existing HTMS catchment area to minimize the impact to students, the community and PPS operations. Sites located outside the HTMS catchment area will likely experience access issues and require middle school and high school boundary change considerations (which in turn will likely add time to the overall project schedule).

SITE SUITABILITY

The ideal site will be close to 9 acres in gross area to accommodate all desired site amenities including onsite parking, outdoor recreational space, athletics, bus and vehicle circulation, etc. The smaller the site the fewer site amenities and/or increased cost to design around site challenges. The ideal site will be located within an established residential neighborhood with easy walkability, accessibility, access to transit and consistent with the District Safe Routes to School (SRTS) goals. Sites that are along busy roads, within commercial or industrial business areas or are otherwise hard to get to are less preferred. Ideally the selected site will accommodate a three story building while providing for appropriate outdoor space.

DEVELOPMENT AVAILABILITY (TIME)

The ideal site will have a high likelihood of being ready for development in time to meet the goal of relocating HTMS for the beginning of school in Fall 2027. Sites not currently under PPS control need to be identified by May, 2022 and able to be under PPS control by Fall 2022 with the ability to break ground by June 2025.

Sites that have many development impediments, unique complexities or unknowns (complex multi-tiered development, unestablished partnerships, etc) are at higher risk to not be available for development in time.

OPERATIONAL SUSTAINABILITY

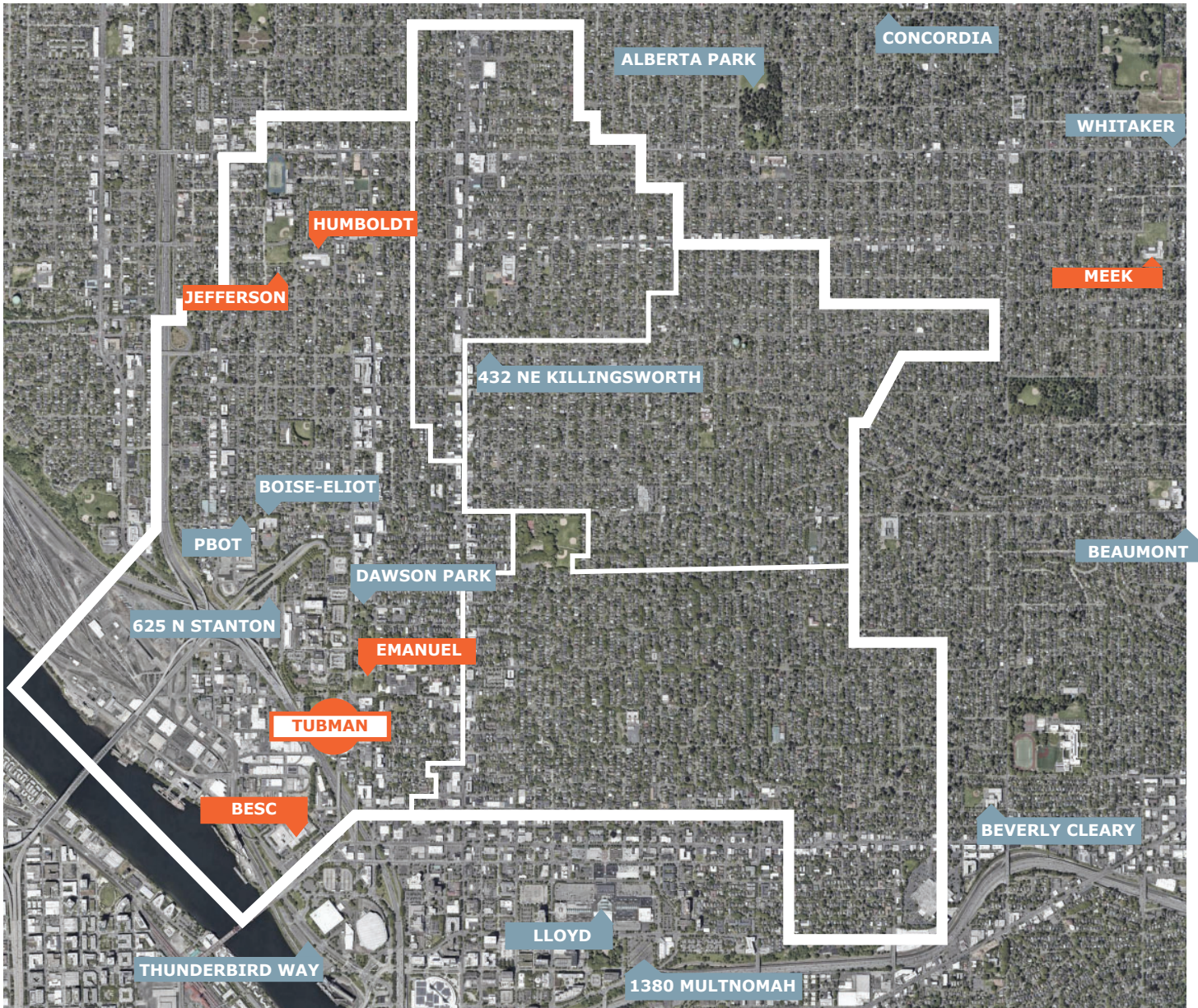
The District is committed to Sustainability and the ideal site will activate underutilized properties and have minimal impact on both the environmental and ongoing operational resources. Additionally, the significant decline in enrollment in the HTMS catchment area should inform the site selection such that robust and sustainable educational resources may flourish in the community. Very often the time of the most negative environmental impact of a building is when it is demolished so a site that does not require significant demolition is preferable. Further, relocating HTMS to an underutilized District property will minimize ongoing operational costs.

COST CONSIDERATIONS

Conceptual cost estimate categories and assumptions are listed on page 11 of this document. We have listed cost considerations for each of the viable sites that we believe are unique to the site, or are something to take note of. This is intended to help provide some additional information to consider when comparing the different sites.

HARRIET TUBMAN MIDDLE SCHOOL CATCHMENT AREA

KENTON



NOTE: The plans and diagrams on the following pages are shown for illustrative purposes. The intent of the diagrammatic plans are to illustrate an example of how a new middle school could potentially fit on the site. The plan is conceptual and does not include detailed land use or design review.

HARRIET TUBMAN MIDDLE SCHOOL

ADDRESS

2231 N FLINT AVE

CONSTRUCTION DATE

1952 (PRIMARY)

CURRENT OWNER

PORTLAND PUBLIC SCHOOLS

LEVELS

2

BLDG AREA

87,610 SF

SITE AREA

3.05 ACRES

CLASSROOM COUNT

33

CAPACITY

732 STUDENTS

2021-22 ENROLLMENT

388 STUDENTS (TOTAL)

35 (MANDARIN)

353 (NEIGHBORHOOD)

ZONING

CM3 COMMERCIAL MIXED USE 3



BESC

ADDRESS

501 N. DIXON ST

CONSTRUCTION DATE

1979

CURRENT OWNER

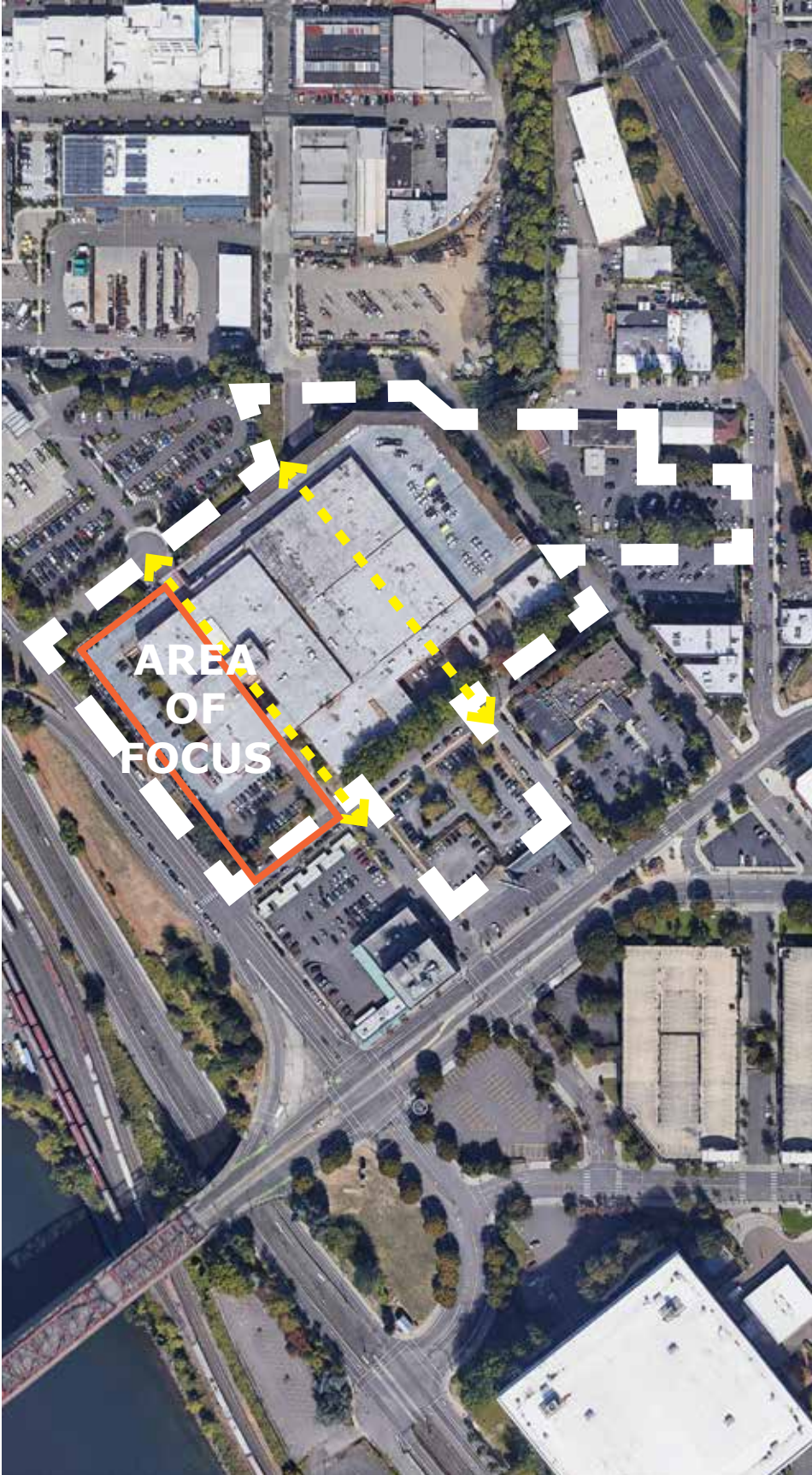
PORTLAND PUBLIC SCHOOLS

SITE AREA

10.15 ACRES

ZONING

EX - CENTRAL EMPLOYMENT





COMMUNITY CONSIDERATIONS

- » Families express the future of the BESC’s surrounding neighborhood needs to be clearly defined
- » Acknowledgement that option is in catchment area, meanwhile not a desirable option for engaged families
- » Additional community input will be received in ongoing engagement sessions.

- » I-5 is nearly contiguous to the northeast portion of the site, albeit in an area planned to be covered in the forthcoming freeway expansion.
- » Zoning: the BESC site is zoned Central Employment (EX); schools are allowed outright on this site. No conditional use review would be necessary.
- » The area to the north of the parcel is zoned for industrial use; to the south, the zoning is intended to support high-density commercial use.

LOCATION

- » BESC is located in the southwest region of the Harriet Tubman Catchment area.

DEVELOPMENT AVAILABILITY (TIME)

- » Before building a middle school at the BESC site, the existing administrative functions would need to be relocated to another site(s). BESC currently supports nearly 600 district employees as well as County staff in the portion of the building leased to Multnomah County. District services supported in the building range from educational support staff (e.g., program directors, administrative coaches, and the like) to instructional material storage in the warehouse.
- » To be sure, BESC is the district’s largest building at 419,000 square feet. A suitable replacement site or, more likely, multiple replacement sites would need to be identified, funded, acquired (lease or purchase), and improved for the relocation of

SITE SUITABILITY

- » With over 10 acres of land, BESC contains sufficient land area to support a middle school program.
- » The pedestrian infrastructure reflects the site’s industrial past and new development would likely re-establish the connections to the neighborhood (see conceptual drawing).
- » The nearest residential area is to the northeast surrounding Irvington Elementary School.

district staff before construction on a new middle school could begin.

- » Locating, procuring and improving locations for the District’s administrative and operational functions will require complex and lengthy real estate decisions with no prescribed timeline. If new locations for current BESC users and functions cannot be secured in time to meet the current timeline, Tubman students will be required to stay in a temporary location longer than 1 year. If new locations for current BESC users and functions cannot ultimately be secured, the Tubman relocation process will need to begin anew.
- » This risk is highlighted below in the schedule table.

OPERATIONAL SUSTAINABILITY

- » Locating Harriet Tubman middle school on the BESC site utilizes existing district assets, and so is efficient in this regard, however, relocating the various administrative functions introduces necessary downstream real estate requirements. The existing administrative and operational functions would need to be supported at another location, albeit with a potentially smaller footprint for some staff as remote work considerations may persist beyond the pandemic.
- » Construction of a new middle school at this site would require demolition of a large building and all new construction.

COST CONSIDERATIONS

Conceptual Cost Estimate Ranges: \$162M to \$186M.

- » Base cost estimates assumptions are outlined in the COST ESTIMATES section. Unique site cost considerations include:

LAND

- » The District already owns the property, no land purchase costs are estimated. (- \$)

HARD COSTS

- » It’s assumed a new building would be built as opposed to renovating the existing. The building is very large at 400,000 SF, and will require extensive demolition, abatement, and site restoration to get it to a suitable condition for building new. (+ \$)

SITE DEVELOPMENT

- » We Anticipate extensive public ROW work to make it suitable for a school that is located near an industrial area and major vehicle thoroughfares. We also anticipate the PBOT will require reconnecting the street grid through the property. (+ \$)

ADMINISTRATIVE RELOCATION

- » The provided cost range excludes costs to relocate current BESC users and functions. A previous analysis (completed in 2019) estimated relocation of current BESC functions would cost between \$72 million and \$124 million. The District is currently working with a 3rd party consultant to update this analysis, which is anticipated to be complete by early Fall.
- » Costs to relocate administrative functions and construct a new Tubman MS on the current BESC site will far exceed the \$120 million provided by the State. Sale of portions of the BESC site (unused for the new school) and/or the current Tubman property could support offsetting costs.

FURTHER CONSIDERATIONS

- » Albina Vision Trust (AVT) has a Right of First Offer (ROFO) in the event the district chooses to sell. Additionally, there is a 99-year lease with the County which is subservient to the AVT ROFO but should AVT pass on the opportunity, the County is next in line so there are timing and legal complexities.

| | BESC COST ESTIMATE RANGE | | |
|----------------------|--------------------------|----------------------|----------------------|
| | % | LOW | HIGH |
| LAND | | NA | NA |
| HARD COSTS | | \$65,213,775 | \$74,733,775 |
| SOFT COSTS | 15% | \$9,782,066 | \$11,210,066 |
| FFE | 10% | \$7,499,584 | \$8,594,384 |
| SITE DEVELOPMENT | 18% | \$14,849,177 | \$17,016,881 |
| SWING SITE X 2 | 5% | \$4,124,771 | \$4,726,911 |
| ADMINISTRATION | 4% | \$4,058,775 | \$4,651,281 |
| CONTINGENCY | 15% | \$15,829,222 | \$18,139,995 |
| ESCALATION | VARIES | \$40,973,903 | \$46,955,331 |
| TOTAL | | \$162,331,273 | \$186,028,624 |
| ROUNDED TOTAL | | \$162,000,000 | \$186,000,000 |

SUMMARY

- » The BESC site incorporates beneficial characteristics including sufficient acreage and location within the current Tubman catchment area. However development of the BESC also carries significant risk, including the unknown feasibility that suitable locations can be found and procured for existing BESC functions and the associated costs or BESC relocation.

RECOMMENDED NEXT STEPS

- » Continue analyzing the BESC site as a potential relocation option for Tubman.

| BESC CONCEPT SCHEDULE | 2022 | 2023 | 2024 | 2025 | 2026 | 2027 |
|--|------|------|------|------|------|------|
| Site Selection | | | | | | |
| Property Negotiations | | | | | | |
| Property Due Diligence | | | | | | |
| Relocate Existing Programs/Departments* | | | | | | |
| Procurement | | | | | | |
| Master Planning | | | | | | |
| Design | | | | | | |
| Construction | | | | | | |
| Swing Site | | | | | | |
| Tubman MS Opens | | | | | | |

* Schedule Risk: Creating a plan and implementing it to relocate several District programs is a critical task that contains schedule impact risks.

LLOYD CENTER

ADDRESS

2201 NE LLOYD CENTER

CURRENT OWNER

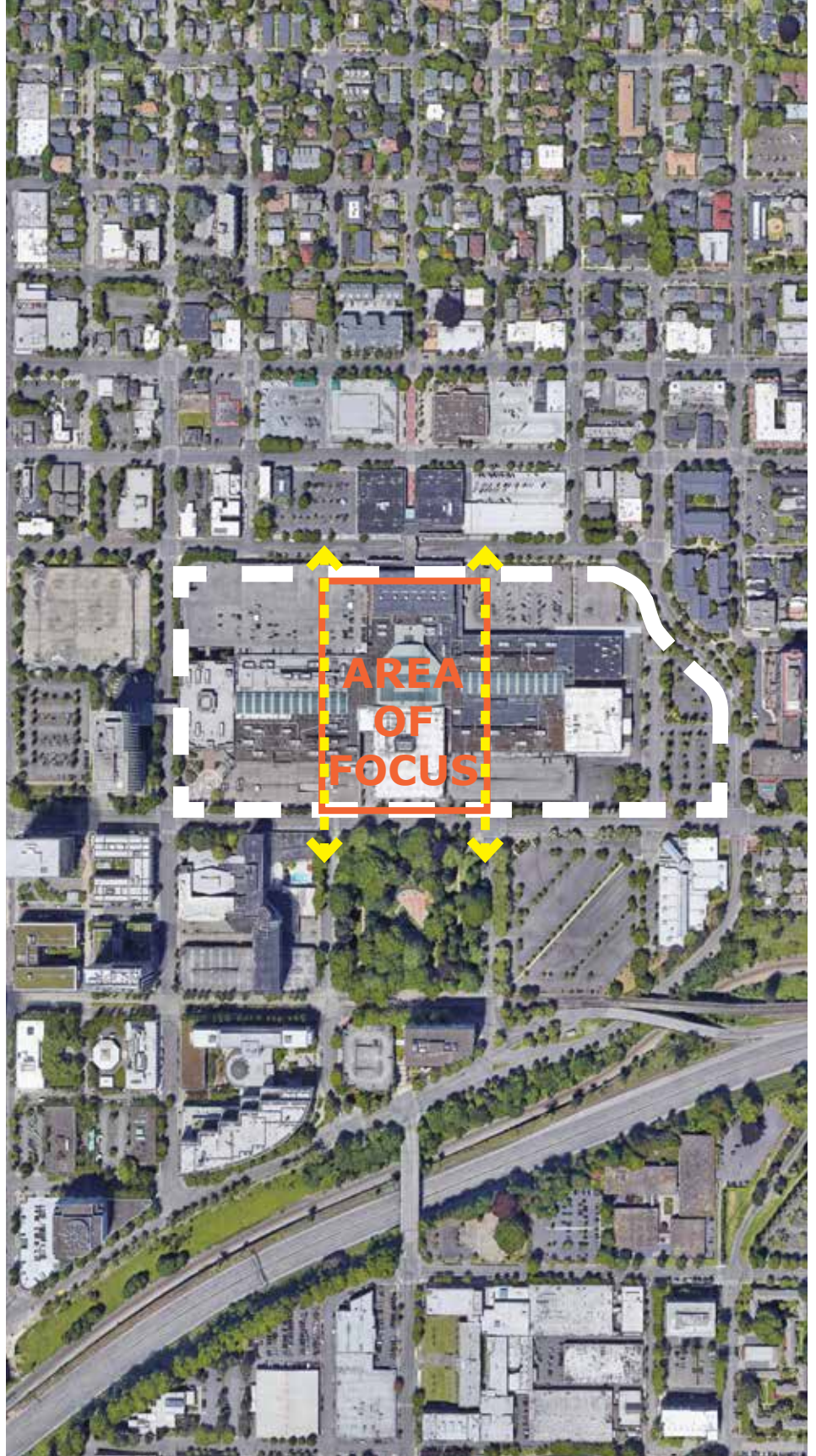
LLOYD CENTER LLC

SITE AREA

24.25 ACRES

ZONING

CX - CENTRAL COMMERCIAL



| | EXISTING CONDITION | | | WHAT FITS? | | |
|---|--|------------------------------|-------------------------------------|---------------|---------|--------------------------|
| | existing building footprint | remaining allowed area (FAR) | remaining footprint (site coverage) | building area | stories | student capacity (rough) |
| LLOYD | confirm portions of building to remain | 4,225,320 | 1,056,330 | 119,000 | 2 | 675 |
| <p>Summary: Site is large enough to add an Ed Spec middle school. Next step is to confirm optimal site area to accommodate school and site elements.</p> | | | | | | |

FIGURE 01 SITE AREA ANALYSIS



FIGURE 02 KELLOGG MS FOOTPRINT ON LLOYD SITE

COMMUNITY CONSIDERATIONS

- » Outside catchment area, but has potential to encourage commuting for families
- » May bring other students in due to its location and ability to commute
- » Also in close proximity to a freeway
- » In a commercial area, which presents trade offs with residential area options
- » Additional community input will be received in ongoing engagement sessions.

LOCATION

- » The Lloyd Center sits two blocks south of the existing Harriet Tubman catchment boundary.

SITE SUITABILITY

- » Lloyd Center is over 24 acres. All or part of the Lloyd Center parcel would be sufficient to support middle school programming.
- » The site is embedded within a predominantly commercial zone, reflecting the heritage of the shopping center. The pedestrian network surrounding the site is typical for Portland’s urban core. The area to the south is severed by I-84. To the north, NE Weidler and SE Broadway offer access to commercial activity but also interrupt access to the Irvington neighborhood.
- » Zoning: the Lloyd Center site is zoned Central Commercial (CX); schools are allowed outright

on the site. No conditional use process would be necessary.

- » Figure 02 overlays Kellogg Middle School on the Lloyd Center site.. The solid orange shape is the Kellogg site and the lighter orange outline is the building. While not a true test-fit, the overlay illustrates the approximate suitability for the site to support a three-story middle school.

DEVELOPMENT AVAILABILITY (TIME)

- » Lloyd Center is currently under new management and long term master planning has begun. The desire on the part of the owners is to maintain office and retail at this location.
- » Utilizing part of the Lloyd site for Harriet Tubman middle school would require complex property negotiations likely to take months or years. Prolonged negotiations could require Tubman students to stay in a temporary location longer than 1 year. If property negotiations are ultimately unsuccessful, the Tubman relocation process will need to start over.

OPERATIONAL SUSTAINABILITY

- » Locating HTMS at Lloyd Center would bring a new asset into the District’s portfolio and require either new construction..
- » Being located outside the existing catchment area will necessitate additional bussing for all of, or most of, the school population.

LLOYD CENTER

- » Locating a school outside the existing catchment area necessitates consideration of realignment of school enrollment boundaries. School enrollment changes are lengthy, complex processes that require thoughtful analysis of all outcomes and robust stakeholder engagement. The district is unable to predict future enrollment changes if Tubman is to be relocated outside the existing catchment area. That said, Lloyd Center is close to the existing Tubman catchment area and overall impacts may be lesser compared to locations
- » The cost estimate assumes demolition of a portion of the existing buildings to make room for construction of a new school.
- » Costs to relocate Tubman MS to the Lloyd Center site will far exceed the \$120 million provided by the State.

FURTHER CONSIDERATIONS

- » With a twenty year redevelopment plan, HTMS would be located in a significant construction area for many years.

COST CONSIDERATIONS

Conceptual Cost Estimate Ranges: \$197M to \$273M

- » Base cost estimates assumptions are outlined in the COST ESTIMATES section. Unique site cost considerations include:
 - » **LAND:** The District would need to purchase/lease a portion or all of the property. The site is considered desirable commercial real estate with highest and best uses of dense commercial development. The cost to purchase this property likely exceeds the high end of the initial cost estimate range. (+ \$)
 - » We assume the need to purchase approximately eight (8) acres of property in the cost estimate.
 - » **HARD COSTS:** The existing site is very large at 24 acres and is composed of a shopping mall, acres of asphalt parking, and parking structures. Significant demolition and site preparation will need to occur to prepare the site for renovation/construction of a new middle school. (+ \$)

SUMMARY

- » The Lloyd Center site includes beneficial characteristics including being available for purchase and large enough to accommodate a comprehensive middle school. However development of this site carries many significant risks including the unknown probability of successful (and timely) property negotiations and potentially exorbitant costs. The site is not located in a residential area, and is located outside the existing Tubman catchment area; the proximity to the current catchment boundary likely reduces the concern over future boundary changes but will still require busing of the majority of the student population.

| | LLOYD CENTER COST ESTIMATE RANGE | | |
|----------------------|----------------------------------|----------------------|----------------------|
| | % | LOW | HIGH |
| LAND | | \$40,000,000 | \$80,000,000 |
| HARD COSTS | | \$60,402,500 | \$69,922,500 |
| SOFT COSTS | 15% | \$9,060,375 | \$10,488,375 |
| FFE | 10% | \$6,946,288 | \$8,041,088 |
| SITE DEVELOPMENT | 12% | \$9,169,100 | \$10,614,236 |
| SWING SITE | 5% | \$3,820,458 | \$4,422,598 |
| ADMINISTRATION | 4% | \$3,575,949 | \$4,139,552 |
| CONTINGENCY | 15% | \$13,946,200 | \$16,144,252 |
| ESCALATION | VARIES | \$49,604,910 | \$68,799,766 |
| TOTAL | | \$196,525,779 | \$272,572,366 |
| ROUNDED TOTAL | | \$197,000,000 | \$273,000,000 |

RECOMMENDED NEXT STEPS

- » Considering the material challenges and risks noted with development of this site, staff recommends pausing further analysis of the Lloyd Center site.

| LLOYD CENTER CONCEPT SCHEDULE | 2022 | 2023 | 2024 | 2025 | 2026 | 2027 |
|-------------------------------|------|------|------|------|------|------|
| Site Selection | | | | | | |
| Property Negotiations | | | | | | |
| Property Due Diligence | | | | | | |
| Relocate Existing Programs | | | | | | |
| Procurement | | | | | | |
| Master Planning | | | | | | |
| Design | | | | | | |
| Construction | | | | | | |
| Swing Site | | | | | | |
| Tubman MS Opens | | | | | | |

MEEK PROF TECH SCHOOL

ADDRESS

4039 NE ALBERTA CT

CONSTRUCTION DATE

1953 (PRIMARY)

LEVELS

1

BLDG AREA

35,945 SF

SITE AREA

5.38 ACRES

CLASSROOMS COUNT

16

CAPACITY

441 STUDENTS

ZONING

R5 RESIDENTIAL 5,000 CU





COMMUNITY CONSIDERATIONS

- » Meek will not work for many Irvington families due to increased distance
- » Boise-Elliott expressed Beaumont or Ockley Green is a better MS options than Tubman for many families, with the proposed site options
- » With this option, a large bussing implication is anticipated for families at multiple feeder schools
- » Additional community input will be received in ongoing engagement sessions.

LOCATION

- » Meek is located less than a mile from the eastern edge of the existing Harriet Tubman catchment area.

SITE SUITABILITY

- » With over five acres, Meek would be one of the smallest middle schools in the district portfolio (only Tubman and Sellwood are smaller) but could support middle school programming with careful site design and early consideration of athletics space requirements.
- » The site is embedded within a predominantly single-dwelling zone, with a commercial core one block to the east. The pedestrian network surrounding the site reflects its residential

character. Meek is well-connected to the surrounding neighborhood by existing sidewalks and low-traffic streets.

- » Zoning: the Meek site is zoned R5 Residential 5,000 CU. Single-family zones have development restrictions - including building size maximums, lot coverage maximums, building setbacks and overall height limits, to name a few - that restrict the size and shape of buildings in the zone. Schools are not allowed by right on this site. A conditional use review would be necessary

DEVELOPMENT AVAILABILITY (TIME)

- » The Alliance program currently uses the building. Once Alliance relocates to the Benson campus in August 2024, Meek will be available.

OPERATIONAL SUSTAINABILITY

- » Locating Harriet Tubman middle school on the Meek campus would realize some operational savings by utilizing an underutilized district asset. Meek is undersized and would require additional square footage to house a middle school. The overall Facility Condition Index (FCI) - the ratio of a building’s maintenance costs relative to the cost of replacing the building at current construction costs - is .09 (which is considered “fair” condition),

suggesting renovation with a new addition is the likely construction option.

- » Being located outside the existing catchment area will necessitate additional bussing for all of, or most of, the school population.
- » Locating a school outside the existing catchment area necessitates consideration of realignment of school enrollment boundaries. School enrollment changes are lengthy, complex processes that require thoughtful analysis of all outcomes and robust stakeholder engagement. The district is unable to predict future enrollment changes if Tubman is to be relocated outside the existing catchment area.

neighborhood, available for construction per schedule and one of the least cost options considered to date. However, Meek is located outside the existing Tubman catchment area. The district is unable to predict future enrollment changes if Tubman is to be relocated outside the existing catchment area. Additionally whole school bussing raises operational and neighborhood concerns.

RECOMMENDED NEXT STEPS

- » Considering the impacts of relocating Tubman outside the existing catchment area (including bussing and school boundary considerations) staff recommend pausing further analysis of the Meek site.

COST CONSIDERATIONS

Conceptual Cost Estimate Ranges: \$132M to \$155M

- » Base cost estimates assumptions are outlined in the COST ESTIMATES section. Unique site cost considerations include
- » **LAND**
- » The District already owns the property, no land purchase costs are estimated. (- \$)
- » Alternative athletic venue(s) would need to be located and potentially leased due to the relatively small land area. (+ \$)

SUMMARY

- » The Meek site contains many desirable characteristics including currently being PPS owned property, within an established

| | MEEK COST ESTIMATE RANGE | | |
|----------------------|--------------------------|----------------------|----------------------|
| | % | LOW | HIGH |
| LAND | | NA | NA |
| HARD COSTS | | \$55,488,450 | \$65,008,450 |
| SOFT COSTS | 15% | \$8,323,268 | \$9,751,268 |
| FFE | 10% | \$6,381,172 | \$7,475,972 |
| SITE DEVELOPMENT | 12% | \$8,423,147 | \$9,868,283 |
| SWING SITE | 5% | \$3,930,802 | \$4,605,199 |
| ADMINISTRATION | 4% | \$3,301,874 | \$3,868,367 |
| CONTINGENCY | 15% | \$12,877,307 | \$15,086,631 |
| ESCALATION | VARIES | \$33,332,877 | \$39,051,706 |
| TOTAL | | \$132,058,894 | \$154,715,874 |
| ROUNDED TOTAL | | \$132,000,000 | \$155,000,000 |

| MEEK CONCEPT SCHEDULE | 2022 | 2023 | 2024 | 2025 | 2026 | 2027 |
|----------------------------|------|------|------|------|------|------|
| Site Selection | | | | | | |
| Property Negotiations | | | | | | |
| Property Due Diligence | | | | | | |
| Relocate Existing Programs | | | | | | |
| Procurement | | | | | | |
| Master Planning | | | | | | |
| Design | | | | | | |
| Construction | | | | | | |
| Swing Site | | | | | | |
| Tubman MS Opens | | | | | | |

JEFFERSON HIGH SCHOOL

ADDRESS

5210 N KERBY AVE

CONSTRUCTION DATE

1909 (PRIMARY)

CURRENT OWNER

PORTLAND PUBLIC SCHOOLS

LEVELS

4

BLDG AREA

318,790 SF

SITE AREA

14.02 ACRES

CLASSROOMS COUNT

74

FUNCTIONAL CAPACITY

1,817 STUDENTS

2021-22 ENROLLMENT

588

ZONING

IR INSTITUTIONAL RESIDENTIAL LCU





COMMUNITY CONSIDERATIONS

- » Tubman staff have expressed concern about the lack of outdoor amenities for students at the current location. Locating Tubman at Jefferson would likely realize a reduction in outdoor space and amenities.
- » Additional community input will be received in ongoing engagement sessions.

LOCATION

- » Jefferson High School is located in the northwest quadrant of the Harriet Tubman catchment area.
- » The Jefferson High School modernization comprehensive master planning is currently underway. Due to the District not currently considering programmatic changes to Jefferson to a 6-12 school model or co-locating Tubman MS and Jefferson HS in a combined facility, this study focused on the existing vacant parcel south of N Alberta St. The site analysis of Jefferson HS’s main campus was included in Due Diligence Vol.1 and is included in Appendix A. The Jefferson High School modernization conceptual site analysis is available [here](#) for reference.

SITE SUITABILITY

- » The Jefferson High School campus consists of three parcels. The largest section, bound by NE Killingsworth on the north and NE Alberta on the south, contains the existing high school. A small parcel to the west is used for parking and a parcel to the south of N Alberta is vacant. Jefferson is flanked to the east, west, and south by single and multi-residential dwellings. The area to the north is zoned to support commercial use. Portland Community College is located to the north of Jefferson and is an important programmatic partner to the school.
- » With fourteen acres, Jefferson has near the median land area across district high schools, albeit without an adjacent park to support athletics programming (unlike Grant or Franklin for example). The long narrow shape of the property (bifurcated by a public street) creates many challenges to site amenities including athletic fields, circulation and parking.
- » The vacant parcel south of Alberta is just over two acres; well below the target acreage of 6-9 acres for a comprehensive middle school and smaller than the smallest current middle school site -

Tubman (3.1 acres) - and lacks an abutting usable park.

- » Zoning: the property is zoned Institutional Residential (IR) which allows dense site development including up to 70% building coverage and a maximum height of 75 feet. Conceptually, the IR zone allows enough square footage to construct a roughly 4 story structure large enough to site a comprehensive middle school, however the trade offs would be substantial and development of this site would likely offer little to no off-street parking for staff and families, minimal bus circulation as well as little to no outdoor spaces or athletic facilities. Additional acreage would need to be acquired to make this a viable site option.
- » Utilizing this parcel for a middle school would alter Jefferson HS comprehensive master planning and would introduce a variety of challenges for both Jefferson and Tubman. The vacant parcel is envisioned as a softball field and parking lot in the Jefferson HS conceptual master plan. The final site plan for Jefferson HS will be determined via the ongoing comprehensive master planning process.

DEVELOPMENT AVAILABILITY (TIME)

- » The southern vacant parcel of Jefferson is expected to be utilized as swing space to temporarily house Jefferson students during construction and will be unavailable for development, until 2026. Beginning construction in 2026 would push the Tubman reopening date to 2028 and require Tubman students to be housed at a temporary location for 2 years. Tubman planning and design would be scheduled to align with the beginning of construction.

OPERATIONAL SUSTAINABILITY

- » Locating Harriet Tubman middle school on this site utilizes existing district property. Construction of a new middle school at this site would require all new construction.

COST CONSIDERATIONS

Conceptual Cost Estimate Ranges: \$130M to \$153M

- » Base cost estimates assumptions are outlined in the COST ESTIMATES section. Unique site cost considerations include:
- » **LAND** - Because the District already owns the property, there are some anticipated savings to be realized as opposed to having to purchase land. (- \$)
- » Alternative athletic venue(s) would need to be located and potentially leased due to the relatively small land area. (+ \$)

| | JEFFERSON COST ESTIMATE RANGE | | |
|----------------------|-------------------------------|----------------------|----------------------|
| | % | LOW | HIGH |
| LAND | | NA | NA |
| HARD COSTS | | \$54,740,000 | \$64,260,000 |
| SOFT COSTS | 15% | \$8,211,000 | \$9,639,000 |
| FFE | 10% | \$6,295,100 | \$7,389,900 |
| SITE DEVELOPMENT | 12% | \$8,309,532 | \$9,754,668 |
| SWING SITE | 5% | \$3,877,782 | \$4,552,178 |
| ADMINISTRATION | 4% | \$3,257,337 | \$3,823,830 |
| CONTINGENCY | 15% | \$12,703,613 | \$14,912,936 |
| ESCALATION | VARIES | \$32,883,270 | \$38,602,099 |
| TOTAL | | \$130,277,632 | \$152,934,612 |
| ROUNDED TOTAL | | \$130,000,000 | \$153,000,000 |

FURTHER CONSIDERATIONS

- » The District is not considering a programmatic change to a 6-12 school model or co-locating Tubman MS and Jefferson HS in a combined facility. Therefore, only the southern parcel at the Jefferson site has been included in the analysis.
- » PPS continues to investigate a utility easement and related facilities located on the site.

SUMMARY

- » The Jefferson HS southern parcel has the benefit of being located within the existing Tubman catchment area and land currently owned by PPS. However the site has considerable challenges including being too small to site a comprehensive middle school.

RECOMMENDED NEXT STEPS

- » Due to the size of the parcel, staff recommends pausing further analysis of the Jefferson southern parcel.

| JEFFERSON HS CONCEPT SCHEDULE | 2022 | 2023 | 2024 | 2025 | 2026 | 2027 | 2028 |
|-----------------------------------|------|------|------|------|------|------|------|
| Site Selection | | | | | | | |
| Property Negotiations | | | | | | | |
| Property Due Diligence | | | | | | | |
| Relocate Existing Programs | | | | | | | |
| Procurement | | | | | | | |
| Master Planning | | | | | | | |
| Design | | | | | | | |
| Construction | | | | | | | |
| Swing Site | | | | | | | |
| Tubman MS Opens | | | | | | | |

*Schedule Risk: The Southern parcel will be utilized as a swing site until 2026

HUMBOLDT ELEMENTARY

ADDRESS
4039 NE ALBERTA CT

SITE AREA
2.98 ACRES

ZONING
RM2 RESIDENTIAL MULTI-DWELLING
R2.5 RESIDENTIAL 2500





HUMBOLDT PLAN DIAGRAM

LOCATION

- » Humboldt is located within the HTMS catchment area and is adjacent to Jefferson High School. It is currently under a long term lease agreement with Kairos, a PPS charter school.

and parking lot in the Jefferson HS conceptual master plan. The final site plan for Jefferson HS will be determined via the ongoing comprehensive master planning process.

SITE SUITABILITY

- » The site is 2.98 acres; about the same size as the existing Tubman property but without the benefit of an adjacent usable park and well below the target acreage of 6-9 acres for a comprehensive middle school. It is also oddly shaped.
- » Zoning: the site is split zoned and conceptually has enough area to site a 3 story comprehensive middle school with some limited site amenities, however the site is oddly configured and use of the vacant parcel connect to Jefferson HS - south of N Alberta St - may be necessary for site amenities such as parking and athletic space. The combination of these two parcels is approximately 5 acres. Utilizing these two parcels will alter Jefferson HS comprehensive master planning and introduce scheduling challenges for amenities shared between the two schools.
- » The vacant parcel is envisioned as a softball field

DEVELOPMENT AVAILABILITY (TIME)

- » The site is currently not available due to the long term lease with KairosPDX, a PPS charter school.

OPERATIONAL SUSTAINABILITY

- » PPS owns the current Humboldt property but has a current long-term lease with KairosPDX, a PPS charter school.

COST CONSIDERATIONS

- Conceptual Cost Estimate Ranges: \$132M to \$155M**
- » Base cost estimates assumptions are outlined in the COST ESTIMATES section. Unique site cost considerations include
 - » **LAND** - TThe District already owns the property, no land purchase costs are estimated. (- \$)

HUMBOLDT ELEMENTARY

- » Costs associated to compensate Kairos for the long-term lease are not included.

FURTHER CONSIDERATIONS

- » Consideration should be given to the overall plan of the Jefferson modernization and flexibility of the outdoor space and impact an adjacent middle school would have.

SUMMARY

- » The Humboldt site has many beneficial characteristics including being owned by PPS and within the existing Tubman catchment area. However the site is not available for development due to the existing long-term lease.

RECOMMENDED NEXT STEPS

- » Staff recommend pausing additional analysis of this site.

| | HUMBOLDT COST ESTIMATE RANGE | | |
|----------------------|------------------------------|----------------------|----------------------|
| | % | LOW | HIGH |
| LAND | | NA | NA |
| HARD COSTS | | \$55,732,225 | \$65,252,225 |
| SOFT COSTS | 15% | \$8,359,834 | \$9,787,834 |
| FFE | 10% | \$6,409,206 | \$7,504,006 |
| SITE DEVELOPMENT | 12% | \$8,460,152 | \$9,905,288 |
| SWING SITE | 5% | \$3,525,063 | \$4,127,203 |
| ADMINISTRATION | 4% | \$3,299,459 | \$3,863,062 |
| CONTINGENCY | 15% | \$12,867,891 | \$15,065,943 |
| ESCALATION | VARIES | \$33,308,504 | \$38,998,155 |
| TOTAL | | \$131,962,333 | \$154,503,716 |
| ROUNDED TOTAL | | \$132,000,000 | \$155,000,000 |

EMANUEL

ADDRESS
122 N GRAHAM ST

CURRENT OWNER
LEGACY HEALTH SYSTEM

SITE AREA
4.01 ACRES

ZONING
C12 CAMPUS INSTITUTIONAL (north)
CM3 COMMERCIAL MIXED USE (south)



EMANUEL



COMMUNITY CONSIDERATIONS

- » Emanuel Medical Center is located in the Albina neighborhood and within the HTMS boundary. Considering the history of negative impact the growth of the hospital has had on the area, the HTMS project could be a welcome step in repairing their relationship with the Black community.

LOCATION

- » The two parcels under consideration are to the north of the hospital within the Harriet Tubman Catchment

SITE SUITABILITY

- » The subject site consists of 2 parcels separated by a public street (N Graham). The sites are approximately 4 acres in aggregate.
- » Dawns Park is located immediately to the north, across N Stanton St, and an established residential neighborhood resides east. Emmanuel Legacy hospital lies directly west (the current emergency room is one block away) and hospital parking and

an office building currently occupy the site. The proximity to a busy hospital has raised concerns about location appropriateness for some students. The current Tubman site is about 1/4-mile from the subject site; which would allow a familiarity to students and families.

- » Zoning: there is a mix of zoning across the two parcels - Commercial Mixed Use 3 (CM3) and Campus Institutional 2 (CI2) - schools are not allowed in CI2 zones and development would first require a successful zone change.

DEVELOPMENT AVAILABILITY (TIME)

- » Legacy has indicated these parcels are not available at this time.

OPERATIONAL SUSTAINABILITY

- » Locating Tubman at this site would bring a new asset into the District's portfolio and (presumably) require demolition of an existing office building followed by new construction.
- » Due to its proximity to the existing Tubman school, transportation would remain substantially similar

to current operation.

COST CONSIDERATIONS

Conceptual Cost Estimate Ranges: \$153M to \$196M.

- » Base cost estimates assumptions are outlined in the COST ESTIMATES section. Unique site cost considerations include
- » **LAND** - Costs of these parcels would include the land as well as the relocation of a significant amount of hospital support and doctors offices.
- » We assume the need to purchase approximately four (4) acres of property in the cost estimate.

FURTHER CONSIDERATIONS

- » Siting a school on a property bifurcated by a highly traveled public right-of-way that conveys vehicles to the adjacent hospital creates notable design and safety concerns.

SUMMARY

- » The subject site has the benefit of being located near the current Tubman location, however development would meet several challenges

including requiring a successful zone change, navigating safety and design questions, but more notably, the current property owner has indicated the parcels are not for sale.

REQUIRED NEXT STEPS

- » Staff recommends pausing further analysis of the site.

| | EMANUEL COST ESTIMATE RANGE | | |
|----------------------|-----------------------------|----------------------|----------------------|
| | % | LOW | HIGH |
| LAND | | \$10,000,000 | \$20,000,000 |
| HARD COSTS | | \$56,236,750 | \$65,756,750 |
| SOFT COSTS | 15% | \$8,435,513 | \$9,863,513 |
| FFE | 10% | \$6,467,226 | \$7,562,026 |
| SITE DEVELOPMENT | 12% | \$8,536,739 | \$9,981,875 |
| SWING SITE | 5% | \$3,556,974 | \$4,159,114 |
| ADMINISTRATION | 4% | \$3,329,328 | \$3,892,931 |
| CONTINGENCY | 15% | \$12,984,379 | \$15,182,431 |
| ESCALATION | VARIES | \$33,610,034 | \$39,299,686 |
| TOTAL | | \$153,156,944 | \$195,698,326 |
| ROUNDED TOTAL | | \$153,000,000 | \$196,000,000 |

CO-LOCATED PROGRAMS

BACKGROUND

In 2016, the district launched a multi-year process to shift from a K-8 configuration to middle school and K-5 configurations. The shift intended to expand instructional programming options for students in grades 6-8. Eighteen of the twenty-nine total K-8s have been converted as of this writing — mostly to K-5s.

Three former K-8 schools were (or will soon be) converted to middle schools, including Harrison Park (planned, fall 2023), Ockley Green, and Roseway Heights. While the future status of the 11 remaining K-8 schools is yet to be determined, most will likely become elementary schools.

Older K-8 facilities are often poorly-suited for effective middle school instruction. They typically lack the specialized STEAM, performing arts, athletic, and elective spaces required to support the needs and interests of middle-grade students.

BOUTIQUE MODELS

Faubion is a counterpoint to older K-8 buildings. Conceived and designed as a K-8, the building successfully supports the full range of grade levels, including dedicated STEAM, performing arts, and elective spaces for middle school students.

If Harriet Tubman Middle School were to be co-located at a PPS site within the Tubman catchment area (in a single school Faubion model), state funding could support a modernization that includes specific and intentional spaces for middle school instruction.

Space challenges would remain, however. Co-locating

Harriet Tubman Middle School would be challenging, but not impossible if approached intentionally and with guidance from the community.

CO-LOCATION SITES

After introductory spatial and zoning analysis of the Boise-Eliot, Irvinton, Martin Luther King, and Sabin school campuses, none of the sites are considered viable co-location options due to a variety of factors including lack of available building square footage (including floor-to-area ratio maximums).

APPENDIX A

ADDITIONAL OPPORTUNITY SITES

District staff still considers the following sites as potential options for the re-location of Harriet Tubman Middle School.

If any of the additional opportunity sites that follow are considered viable by the Board, district staff can provide deeper analysis similar to what has been provided for the above locations.

KENTON

KENTON

ADDRESS

7528 N FENWICK AVE

CONSTRUCTION DATE

1913 (PRIMARY)

LEVELS

3

BLDG AREA

66,599 SF

SITE AREA

3.96 ACRES

CLASSROOM COUNT

18

ZONING

RM2 - RESIDENTIAL MULTI-DWELLING 2

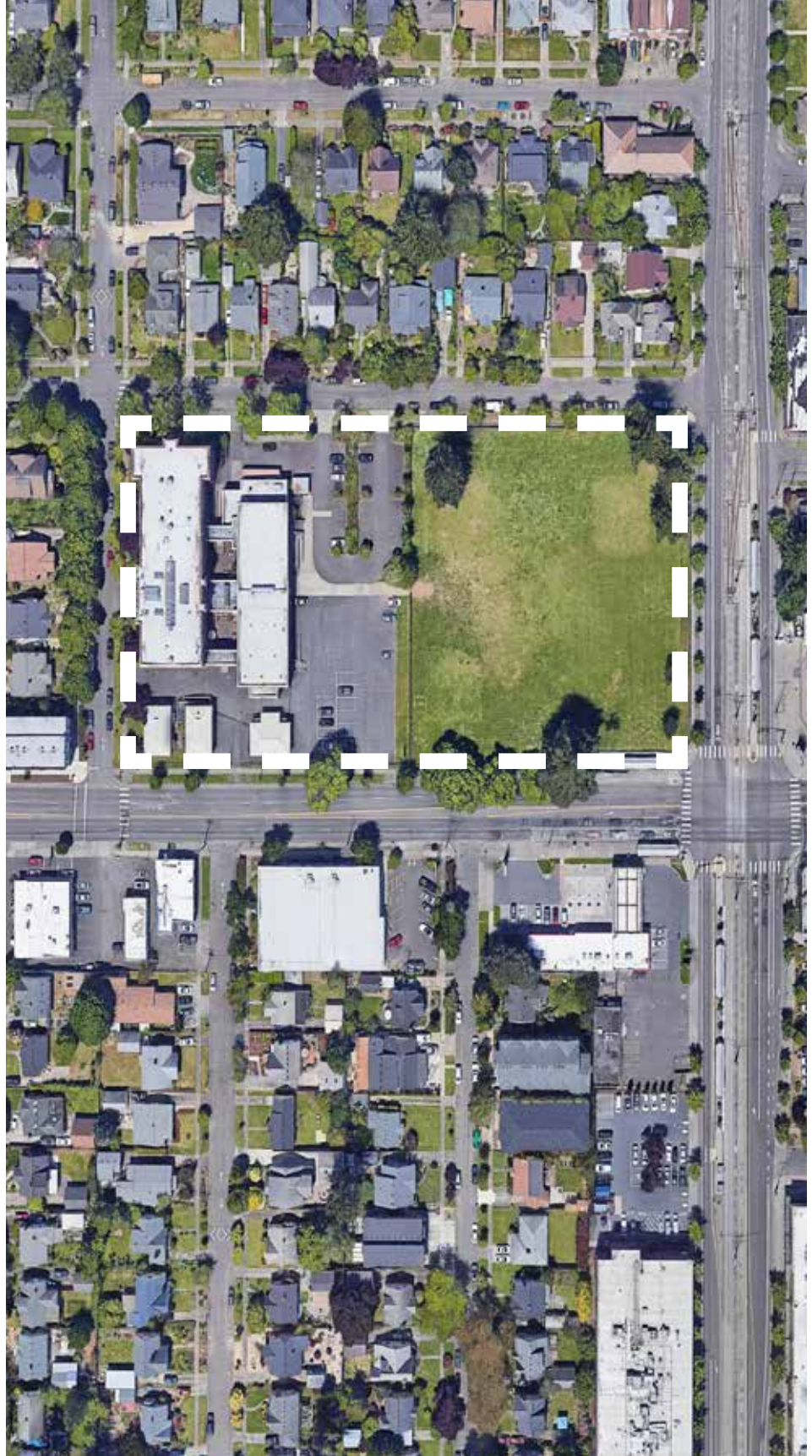




FIGURE 01 HARRIET TUBMAN CATCHMENT



FIGURE 02 KELLOGG MS FOOTPRINT ON KENTON SITE

RACIAL EQUITY AND SOCIAL JUSTICE

»

COMMUNITY CONSIDERATIONS

- » Additional community input will be received in March and April.

LOCATION

- » Kenton is located 1.6 miles north of the Harriet Tubman catchment area.

SITE SUITABILITY

- » At four acres, supporting middle school programming at Kenton would be challenging, especially for athletics.
- » The site is flanked to the south and east by high-traffic streets: N. Lombard and N. Interstate.
- » Zoning: The Kenton site is zoned RM2 - Residential Multi-Dwelling. Schools are not allowed by right on this site. A conditional use review would be necessary. Land area surrounding the site supports

a patchwork of uses, from residential to the north and south, and commercial to the east and west.

- » Figure 02 overlays Kellogg Middle School on the Kenton site. The solid orange shape is the Kellogg site and the lighter orange outline is the building. While not a true test-fit, the overlay illustrates the approximate suitability for the site to support a three-story middle school.

DEVELOPMENT AVAILABILITY (TIME)

- » The Alliance program currently uses the building. Once Alliance relocates to the Benson campus in 2024, Kenton will be available.

OPERATIONAL SUSTAINABILITY

- » Locating Harriet Tubman middle school on the Kenton site would realize some operational savings by utilizing an underutilized district asset. Kenton is undersized and would require additional square footage to house a middle school. The overall Facility Condition Index (FCI) - the ratio of a building's maintenance costs relative to the cost of replacing the building at current construction costs - is .28 (or colloquially "poor"), suggesting renovation with a new addition is the likely

construction option.

COST CONSIDERATIONS

- » Because the District already owns the property, there are some savings to be realized as opposed to having to purchase land. (- \$)
- » The existing building is in fairly good condition with exceptions like the mechanical, electrical, and plumbing systems. It has the potential to be well-suited to renovating and adding new on to the existing building. (- \$)
- » Alternative athletic venue(s) would need to be located and potentially leased due to the relatively small land area. (+ \$)
- » We believe this property to be in the low to middle of the cost range provided.

FURTHER CONSIDERATIONS

- » Kenton is twenty thousand square feet smaller than the existing Harriet Tubman building. Significant capital investment would be necessary to align the building with middle school space requirements.

REQUIRED NEXT STEPS

- » If considered viable by the Board, district staff will begin master planning efforts.

1380 NE MULTNOMAH

ADDRESS

1380 NE MULTNOMAH ST

CURRENT OWNERS

MULTIPLE

SITE AREA

6.51 ACRES

ZONING

CX - CENTRAL COMMERCIAL

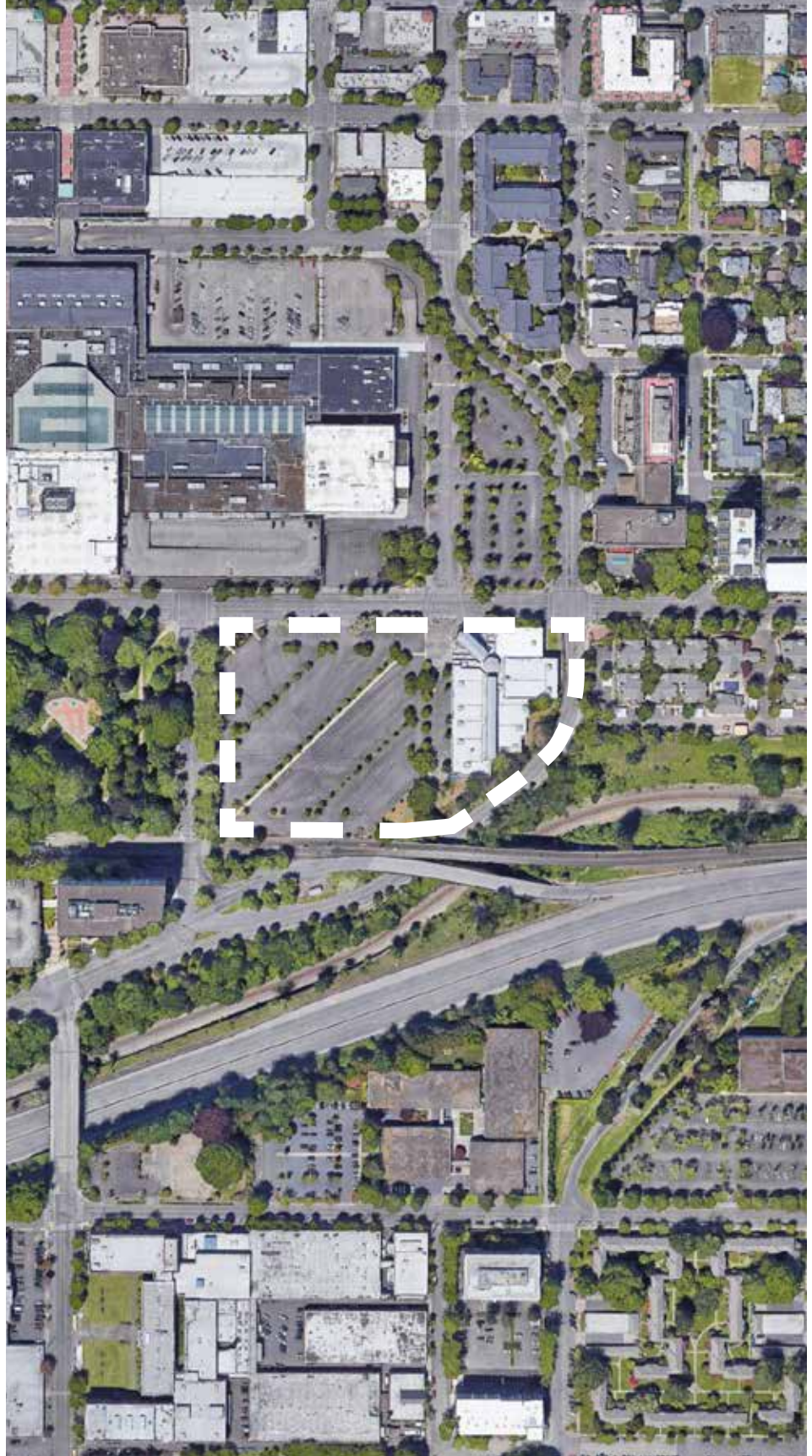




FIGURE 01 HARRIET TUBMAN CATCHMENT



FIGURE 02 KELLOGG MS FOOTPRINT ON 1380 NE MULTNOMAH SITE

RACIAL EQUITY AND SOCIAL JUSTICE

»

COMMUNITY CONSIDERATIONS

- » Additional community input will be received in March and April.

LOCATION

- » The NE Multnomah sits three blocks south of the existing Harriet Tubman catchment boundary.

SITE SUITABILITY

- » By combining two adjacent parcels, the site would be 6.51 acres which is sufficient to support middle school programming. Individually, each parcel is unsized to support a middle school.
- » The site is embedded within a predominantly commercial zone, reflecting the heritage of the shopping center.
- » The pedestrian network surrounding the site is typical for Portland’s urban core. The area to the

south is severed by I-84. To the north, NE Weidler and SE Broadway offer access to commercial activity but also interrupt access to the Irvington neighborhood.

- » Zoning: the NE Multnomah site is zoned Central Commercial (CX); schools are allowed outright on the site. No conditional use process would be necessary.
- » Figure 02 overlays Kellogg Middle School on the NE Multnomah site. The solid orange shape is the Kellogg site and the lighter orange outline is the building. While not a true test-fit, the overlay illustrates the approximate suitability for the site to support a three-story middle school.

DEVELOPMENT AVAILABILITY (TIME)

- » This study assumes two parcels would be purchased and consolidated. The western parcel is currently for sale and the developers of Lloyd Center have indicated they would be open to divesting of the adjacent movie theater parcel however, the location is zoned for high density and a number of development restrictions and agreements with Lloyd Center would need to be negotiated.

OPERATIONAL SUSTAINABILITY

- » Locating HTMS at NE Multnomah would bring a new asset into the District's portfolio and require a new middle school be constructed.

COST CONSIDERATIONS

- » 1. The District would need to purchase multiple parcels of land. The site is considered desirable commercial real estate with highest and best uses of dense commercial development. The cost to purchase this property likely exceeds the high end of the initial cost estimate range. (+ \$)
- » 2. The existing sites are a mix of asphalt parking lots, and the existing Regal Lloyd Theater bldg. Complex. Connecting the different areas to make a cohesive middle school campus seems to be a particular challenge and carries with it some cost risk. (+ \$)
- » We believe this property to be higher on the cost range provided.

FURTHER CONSIDERATIONS

- » The parcel currently for sale (the western site) is 4.5 acres. Supporting a middle school on this land area would be challenging and could likely happen only at the expense of athletics programming. The initial cost being discussed by developers for this site is \$40M.

REQUIRED NEXT STEPS

- » If considered viable by the Board, district staff will begin a dialogue with the owners regarding the site.

WHITAKER-ADAMS

ADDRESS

5700 NE CESAR E CHAVEZ BLVD

SITE AREA

10.05 ACRES

ZONING

CM2 COMMERCIAL MIXED USE 2

R5 RESIDENTIAL 5,000 CU





FIGURE 01 HARRIET TUBMAN CATCHMENT



FIGURE 02 KELLOGG MS FOOTPRINT ON WHITAKER-ADAMS SITE

RACIAL EQUITY AND SOCIAL JUSTICE

»

COMMUNITY CONSIDERATIONS

- » Additional community input will be received in March and April.

LOCATION

- » Whitaker-Adams is outside the Harriet Tubman catchment area to the east.

SITE SUITABILITY

- » With over 10 acres of land, Whitaker-Adams contains sufficient land area to support a middle school program. The site is bound to the south and east by high-traffic streets; the north and west edges of the site are contiguous with Fernhill Park and the Concordia neighborhood respectively.
- » Zoning: the bulk of the Whitaker-Adams site is zoned Residential 5,000 CU (R5). The eastern edge of the site that fronts NE 42nd Ave is zoned

Commercial Mixed Use2 (CM2). Schools are allowed outright in zone CM2. However, they are not allowed outright in R5. A conditional use review would be necessary.

- » Figure 02 overlays Kellogg Middle School on the Whitaker-Adams site. The solid orange shape is the Kellogg site and the lighter orange outline is the building. While not a true test-fit, the overlay illustrates the approximate suitability for the site to support a three-story middle school.

DEVELOPMENT AVAILABILITY (TIME)

- » The district owns Whitaker-Adams and is immediately available for redevelopment.

OPERATIONAL SUSTAINABILITY

- » Locating HTMS at the Whitaker-Adams site would require new construction of a school on vacant District property.

COST CONSIDERATIONS

- » Because the District already owns the property,

there are some savings to be realized as opposed to having to purchase land. (- \$)

- » The site has already been cleared of buildings and is basically an open field ready for construction. (- \$)
- » We believe this property to be in the low to middle of the cost range provided.

FURTHER CONSIDERATIONS

- » The district's Long-Range Facility Plan identifies Whitaker-Adams as one of three athletics hubs across the district. Together the three hubs support middle and high school athletics in regionally distinct, programmatically specific ways.
- » Additional consideration should be given to the proximity of this location to Ockley Green MS which is located in between the current Harriet Tubman site and Whitaker-Adams

REQUIRED NEXT STEPS

- » If considered viable by the Board, district staff will begin master planning efforts.

JEFFERSON HIGH SCHOOL

ADDRESS

5210 N KERBY AVE

CONSTRUCTION DATE

1909 (PRIMARY)

CURRENT OWNER

PORTLAND PUBLIC SCHOOLS

LEVELS

4

BLDG AREA

318,790 SF

SITE AREA

14.02 ACRES

CLASSROOMS COUNT

74

FUNCTIONAL CAPACITY

1,817 STUDENTS

2021-22 ENROLLMENT

588

ZONING

IR INSTITUTIONAL RESIDENTIAL LCU



LOCATION

- » Jefferson High School is located in the northwest quadrant of the Harriet Tubman catchment area. The site consists of three parcels. The largest section, bound by NE Killingsworth on the north and NE Alberta on the south, contains the existing high school. A small parcel to the west is used for parking and a parcel to the south of Alberta is vacant. The vacant parcel is just over two acres.
- » Jefferson is flanked to the east, west, and south by single and multi-residential dwellings. The area to the north is zoned to support commercial use. Portland Community College is located to the north of Jefferson and is an important programmatic partner to the school.

LAND AREA

- » With fourteen acres, Jefferson has near the median land area across district high schools, albeit without an adjacent park to support athletics programming. Adding a middle school to the site would introduce scheduling challenges for amenities shared between the high and middle school, if not fully compromise athletics programming.
- » The portion of Jefferson's site to the south of NE Alberta is approximately two acres. This is insufficient land area to support middle school programming.

AVAILABILITY (TIMING)

- » Master planning for the Jefferson modernization is ongoing. The addition of a middle school would require a reset of the work completed to date. Schedule impacts to both Jefferson and Harriet Tubman would be inevitable.

FURTHER CONSIDERATIONS

- » None

REQUIRED NEXT STEPS



- » If considered viable by the Board, district staff will begin a dialogue with the Office of School Modernization around coordinating Harriet Tubman middle school with the current master planning effort.

SITES NO LONGER UNDER CONSIDERATION

The following locations have been removed from consideration as they do not meet the basic criteria for a new building location

BEAUMONT

ADDRESS

4043 NE FREMONT STREET

CURRENT OWNER

PORTLAND PUBLIC SCHOOLS

SITE AREA

5.72 ACRES

ZONING

R5 - RESIDENTIAL 5,000





HARRIET TUBMAN CATCHMENT

LOCATION

- » Beaumont is located just outside of the Harriet Tubman catchment area 1.0 mile directly east along Fremont.

SITE SUITABILITY

- » With over five acres, Beaumont could support middle school programming with careful site design and early consideration of athletics space requirements.
- » This site is not considered viable as it is outside of the catchment area currently occupied by students.

DEVELOPMENT AVAILABILITY (TIME)

- » Beaumont is owned by the District.

BEVERLY CLEARY

ADDRESS

3255 NE HANCOCK ST

CURRENT OWNER

PORTLAND PUBLIC SCHOOLS

SITE AREA

4.27 ACRES

ZONING

R5 - RESIDENTIAL 5,000





HARRIET TUBMAN CATCHMENT

LOCATION

- » Beverly Cleary is located just outside of the Harriet Tubman catchment area 1.0 mile directly east along Fremont.

SITE SUITABILITY

- » With just over four acres, Beverly Cleary might be able to support middle school programming with careful site design and early consideration of athletics space requirements. However, it may prove to be challenging.
- » This site is not considered viable as it is outside of the catchment area currently occupied by students.

DEVELOPMENT AVAILABILITY (TIME)

- » Beverly Cleary is owned by the District.

ALBERTA PARK

ADDRESS

1905 NE KILLINGSWORTH ST

CURRENT OWNER

CITY OF PORTLAND

SITE AREA

16.70 ACRES

ZONING

OS - OPEN SPACE





HARRIET TUBMAN CATCHMENT

LOCATION

- » Alberta Park is outside the existing Harriet Tubman catchment area. It sits northeast of the catchment boundary by approximately a mile.

SITE SUITABILITY

- » With more than sixteen acres, Alberta Park contains more than sufficient land area to support a middle school. The park is directly north of Vernon K-8 and is flanked by residential neighborhoods to the east and west and commercial strips to the north and south.
- » The park is currently owned by the City of Portland, if negotiations proceed, athletic resources shared by the City and the district should be considered.
- » The site is not considered viable as the District does not support displacement of amenities supporting the historically Black neighborhoods nor does the site have sufficient land for a school.

DEVELOPMENT AVAILABILITY (TIME)

- » Alberta Park is currently owned by the City of Portland. It is not available for purchase or development. It is documented here for discussion purposes only.

CONCORDIA

ADDRESS

2811 NE HOLMAN ST

CURRENT OWNER

CONCORDIA UNIVERSITY

SITE AREA

18.88 ACRES

ZONING

CI1 - CAMPUS INSTITUTIONAL 1





HARRIET TUBMAN CATCHMENT

LOCATION

- » Concordia is outside the Harriet Tubman catchment area. The site is nearly two miles northeast of the Harriet Tubman catchment boundary.

SITE SUITABILITY

- » At almost nineteen acres, Concordia contains more than sufficient land area to support a middle school program.
- » The site does not meet criteria as it lacks transit, is fully built out, far larger than needed, would require zone change and comp plan amendment rendering the development availability impossible.

DEVELOPMENT AVAILABILITY (TIME)

- » This parcel is not available for purchase. It is documented here for discussion purposes only.

DAWSON PARK

ADDRESS
1 N STANTON

CURRENT OWNER
CITY OF PORTLAND

SITE AREA
2.05 ACRES

ZONING
OS - OPEN SPACE





HARRIET TUBMAN CATCHMENT

LOCATION

- » Dawson Park is located several blocks north of the existing Harriet Tubman Middle School building.

of amenities supporting the historically Black neighborhood.

SITE SUITABILITY

- » At two acres, Dawson Park has insufficient land area to support middle school programming.
- » The site is flanked to the east and west by two high-traffic streets: N Vancouver Ave and N Williams Ave. On the other side of N. Vancouver to the west, is the Legacy Medical Center; to the east is a patchwork of commercial and residential zones.
- » All pedestrian access is challenged by the two neighborhood collectors, N Vancouver Ave and N Williams Ave, on either side of the site. Connection to the neighborhood to the east is limited for this reason.
- » The existing Harriet Tubman middle school site is the smallest (in terms of land area) in the district with only three acres and benefits from its adjacency to Lillis Albina Park. No such adjacency exists at Dawson Park.
- » The site lacks sufficient acreage for development and the District does not support displacement

DEVELOPMENT AVAILABILITY (TIME)

- » Dawson Park is currently owned by the City of Portland. It is not available for purchase or development. It is documented here for discussion purposes only.

N. STANTON

ADDRESS
625 N STANTON ST

CURRENT OWNER
CITY OF PORTLAND

SITE AREA
5.27 ACRES

ZONING
IG1 - GENERAL INDUSTRIAL 1





HARRIET TUBMAN CATCHMENT

LOCATION

- » N. Stanton is located within the Harriet Tubman catchment area immediately east of Legacy Medical Center.

- » The district has not started a dialogue with the City around relocating Harriet Tubman Middle School at this site.
- » At this time it is unknown whether the City would consider sale or shared use of the site.

SITE SUITABILITY

- » While the parcel is over five acres, the parcel geometry would challenge successful athletics programming on the site.
- » The site sits within a patchwork of commercial and industrial areas with no meaningful access to the residential areas. To the west, the site is bracketed by I-5 and I-405; to the east, the medical center interrupts any potential pedestrian access to the Eliot neighborhood.
- » The site is not considered viable. Since it is adjacent to both I-5 and I-405, the risk of repeating the environmental harm at the existing Harriet Tubman site is high.

DEVELOPMENT AVAILABILITY (TIME)

- » N Stanton is currently owned by the City of Portland.

432 NE KILLINGSWORTH ST

ADDRESS

432 NE KILLINGSWORTH ST

CURRENT OWNERS

CITY OF PORTLAND & BOYS AND GIRLS CLUB

SITE AREA

4.26 ACRES

ZONING

CM3 - COMMERCIAL MIXED USE 3

CM2 - COMMERCIAL MIXED USE 2





HARRIET TUBMAN CATCHMENT

LOCATION

- » Located at the corner of NE Killingsworth and NE MLK Jr, this site is located in the north-central area of the Harriet Tubman catchment area.

SITE SUITABILITY

- » At less than five acres, supporting middle school programming at the corner of NE MLK Jr Blvd and NE Killingsworth st would be challenging, especially athletics. The parcel sits immediately to the east of a major city traffic street: NE MLK Jr and another high-traffic street to the north — NE Killingsworth St. These two streets limit safe access to the Humboldt neighborhood to the west. To the east, the immediate vicinity is predominately commercial with few direct connections to the Vernon neighborhood.
- » The site is flanked on the north and west by high-traffic streets which further complicating safe athletics programming on this site.
- » The site is not considered viable as it would displace historically Black businesses, have significant safety issues given the surrounding streets and would limit access and be a long and uncertain path to property acquisition.

DEVELOPMENT AVAILABILITY (TIME)

- » For the purposes of this study, two parcels were combined. Negotiations would need to be successful with both owners.
- » The district has not started a dialogue with either owner around relocating Harriet Tubman Middle School to the sites.
- » At this time it is unknown whether the current owners would consider sale or shared use of the site.

PBOT

ADDRESS

3150 N MISSISSIPPI AVE

CURRENT OWNER

CITY OF PORTLAND

SITE AREA

5.51 ACRES

ZONING

IG1 - GENERAL INDUSTRIAL 1





HARRIET TUBMAN CATCHMENT

LOCATION

- » PBOT is located within the Harriet Tubman catchment area Northeast of where Fremont Bridge and the I-5 meet.

of relocating important City services.

DEVELOPMENT AVAILABILITY (TIME)

- » PBOT is currently owned by the City of Portland.

SITE SUITABILITY

- » With over five acres, PBOT could support middle school programming with careful site design and early consideration of athletics space requirements.
- » The site currently serves various functions for the Portland Bureau of Transportation (hence the moniker, “PBOT”). The parcel sits immediately north of the I-5 and I-405 exchange. Access to areas south of the site is impossible because of the freeways. To the north, the site is bound by a commercial zone and, to the northeast, a residential area, and Boise-Eliot Elementary School.
- » Pedestrian access to and throughout the site is poor. Sidewalks are limited. Connections to the neighborhood to the northeast are indirect and circuitous.
- » This site is not considered viable due to its proximity to two freeways, the lack of neighborhood connections and the complication

THUNDERBIRD WAY

ADDRESS

4013 NE 18TH AVE

CURRENT OWNERS

PORTLAND TRAIL BLAZERS & STATE OF OREGON

SITE AREA

3.71 ACRES

ZONING

CX - CENTRAL COMMERCIAL





HARRIET TUBMAN CATCHMENT

LOCATION

- » The Thunderbird Way site is outside the Harriet Tubman catchment area, south of the Broadway bridge and near BESC and the Moda Center.

SITE SUITABILITY

- » At less than four acres, Thunderbird Way does not contain sufficient land area to support middle school programming, especially athletics.
- » The site geometry would also challenge any development; it is too narrow for most school functions.
- » The site is bound by a set of train tracks, the Willamette River, and N. Interstate Ave. The surrounding context is predominantly commercial, connections into and out of the site are poor, and the pedestrian network is fragmented.
- » This location is not considered viable due to size, location and air quality concerns.

DEVELOPMENT AVAILABILITY (TIME)

- » The site is privately owned.

- » The district has not started a dialogue with the owners around relocating Harriet Tubman Middle School at this site.
- » At this time it is unknown whether the current owners would consider sale or shared use of the site.

APPENDIX B

SUPPORTING DOCUMENTS

- » 2022 State Investment Request
- » PPS Letter to Oregon Transportation Commission
- » Oregon Transportation Commission Letter to PPS
- » Environmental Safety & Health Considerations
- » Indoor and Outdoor Air Quality Health Risk Assessment
- » PPS Resolution 5856 - March 19, 2019
- » PPS Resolution 6008 - December 3, 2019
- » PPS Resolution 6354 - July 27, 2021



RELOCATING HARRIET TUBMAN MIDDLE SCHOOL



BACKGROUND

Over the course of decades, the Historic Albina neighborhood -- the heart of Oregon’s historic Black community -- has experienced harm caused by the construction and presence of the I-5 freeway. Since Black families had their homes and businesses demolished to make way for construction of the freeway and other “urban renewal” projects nearly fifty years ago, the air pollution and increased traffic associated with the freeway have negatively impacted the health of neighborhood residents and their quality of life. The resulting displacement and disinvestment in the Albina neighborhood is part of our community’s shared history.

The Federal-Aid Highway Act of 1956 originally provided funds to construct the interstate, in the process demolishing

several hundred housing units and constructing the freeway immediately adjacent to what was then Eliot Elementary, which had opened in 1952. The creation of Harriet Tubman Middle School in the early 1980s at the former Eliot School site has historical significance, as it played a pivotal role in the struggle over school desegregation and racist busing policies in Portland during the 1960s-1980s. Harriet Tubman has served PPS students in the Albina neighborhood since the early ‘80s, and then in 2018 reopened as a middle school as part of a district-wide Middle School Framework to provide students with a more comprehensive and equitable middle school experience and better preparation for high school. For this framework to be successful long-term, it is essential that students are educated in a building that is not negatively impacted by

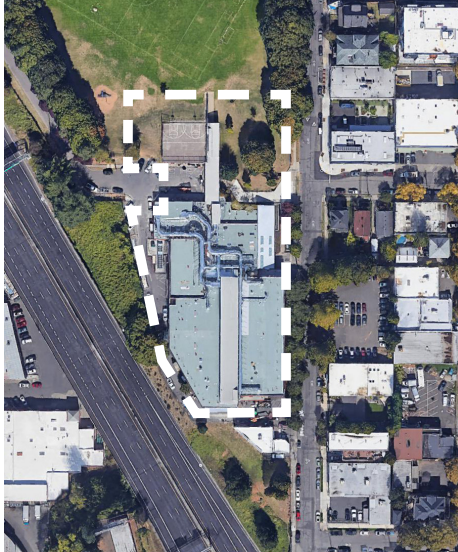
significant adjacent project construction and longer-term negative impacts from unhealthy ambient air quality, noise, and vibrations.

The location of the freeway directly adjacent to the school has created enduring environmental impacts. Today the exterior area of Harriet Tubman is functionally unusable for school purposes. As currently designed, the proposed I-5 Rose Quarter Improvement Project would further cut into the Harriet Tubman Middle School site, threatening to worsen the environmental situation and negative health impacts, both during construction and over the long term.

The image below is of the existing Harriet Tubman Middle School site and demonstrates the current proximity of the interstate to the school. The

interstate expansion will exacerbate existing environmental hardships and threaten the western edge of the site.

FIGURE 1: EXISTING CONDITIONS AT HARRIET TUBMAN MIDDLE SCHOOL



PROPOSAL

Utilize state funds to relocate and rebuild Harriet Tubman Middle School to address the patterns of entrenched racism that have negatively impacted the Albina neighborhood for generations and address the additional environmental harm contemplated by the future interstate expansion.

Portland Public Schools is actively studying nearly twenty sites.

DEVELOPMENT PROPOSAL

Few sites within the Harriet Tubman catchment area meet the land area required for a middle school. In addition to the building area (over 100,000 SF of instructional space), outdoor play/athletics space, parking, setbacks, among other site conditions, must be considered. The optimal

site area for a middle school is between six and nine acres.

Of utmost importance in the siting of the new Harriet Tubman are improved environmental conditions from the existing school location.

To this end, the district has reviewed more than twenty mid-sized, potentially suitable properties, both within and near the Albina neighborhood that meets the district criteria. While no single site clearly stands as an obvious candidate to the exclusion of all others, the district has enough information to generate the cost ranges described in figure 2 below.

Many important considerations remain unknown at this time: first among many is whether any existing program operating at a site could be relocated to another site within an acceptable timeline.

FIGURE 2: PRELIMINARY COST ESTIMATE RANGE

| | COST ESTIMATE RANGE | | |
|----------------------|---------------------|----------------------|----------------------|
| | % | LOW | HIGH |
| LAND | | \$15,000,000 | \$30,000,000 |
| HARD COSTS | | \$54,791,520 | \$64,320,480 |
| SOFT COSTS | 15% | \$8,218,728 | \$9,648,072 |
| FFE | 10% | \$6,301,025 | \$7,396,855 |
| SITE DEVELOPMENT | 12% | \$8,317,353 | \$9,763,849 |
| SWING SITE | 0% | \$0 | \$0 |
| ADMINISTRATION | 4% | \$3,105,145 | \$3,645,170 |
| CONTINGENCY | 15% | \$12,110,066 | \$14,216,164 |
| ESCALATION | VARIABLES | \$19,936,190 | \$23,403,353 |
| TOTAL | | \$127,780,026 | \$162,393,944 |
| ROUNDED TOTAL | | \$128,000,000 | \$162,000,000 |

SCHEDULE

Due to the proximity to the site and location of construction access roads, work on the Eliot Viaduct will directly impact the safety and learning of students at Harriet Tubman Middle school. Recent construction schedules provided to the district from ODOT indicate this work will begin in June of 2027, suggesting the Harriet Tubman students must be relocated by August 2027.

Working backward from August 2027, the district can use our recently constructed Kellogg Middle School to infer the necessary duration to build a middle school. Kellogg Middle School opened in August of 2021 after four years of planning, design, and construction. The process began in May 2017 with procuring architectural and engineer services. Planning, design, and permitting took approximately two years; construction also took two years.

Comparing Kellogg with the development proposal described above, it's worth noting a number of asymmetries between the processes. First, the district already owned the parcel for Kellogg Middle School. Not all sites currently under consideration are within the district's control. In these cases, the district must negotiate with the current property owner for sale, lease, or trade for the land. If the current property owner is another government agency, there will likely be a public process around the property purchase. District staff estimate a minimum of six months would be required for property negotiations.

To further address potential differences between

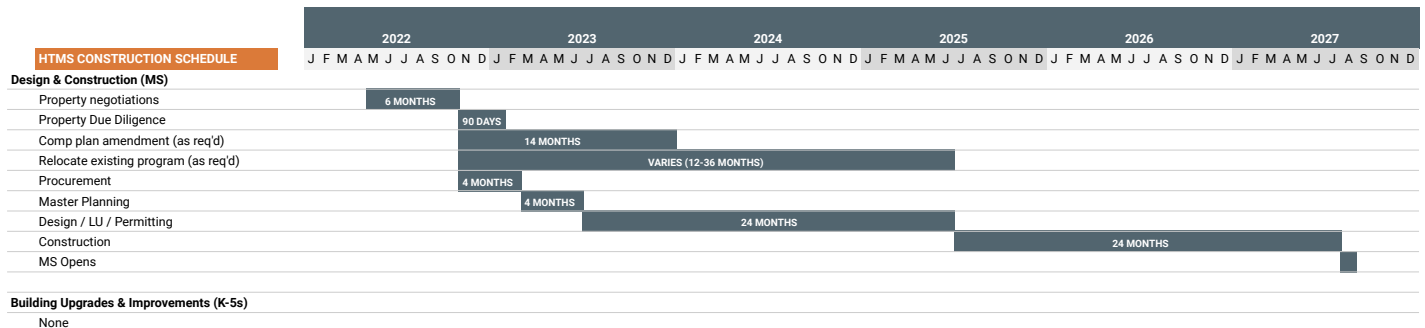
Kellogg and the current study, the existing zoning for Kellogg allowed school use through a conditional land use process — a familiar and predictable administrative process for granting land-use approval for schools. Some parcels currently under consideration do not allow school use. These parcels will require comprehensive plan amendments — a process that requires City Council approval. A comprehensive plan amendment is in no way guaranteed. If the district pursues a parcel that does not allow school use, it does so at risk.

Returning to the inferences we can make from the assumed I-5 construction schedule and the timeline from Kellogg Middle School, the district should identify and begin procurement for design services by August 2023. However, lessons learned from previous projects, including Kellogg, suggest additional time for procurement and planning are prudent, to say nothing of time for scheduling contingencies to address unexpected or unknown site conditions, supply-chain issues, or labor shortages.

Accounting for lessons learned and scheduling contingencies, work on any site currently within the district's control should proceed no later than November 2022 to relocate Harriet Tubman students successfully. In the case where the district does not own the selected parcel, an additional six months of property negotiations prior to any planning or design will be necessary. In this latter case, the district must identify a site by May 2022 to relocate Harriet Tubman students by August 2027.

The preliminary schedule is presented below in figure 3.

FIGURE 3: PRELIMINARY PLANNING AND CONSTRUCTION SCHEDULE





PORTLAND PUBLIC SCHOOLS

501 North Dixon Street / Portland, OR 97227

Telephone: (503) 916-2000

Mailing Address: P. O. Box 3107 / 97208-3107

June 6, 2019

Tammy Baney, Chair
Alando Simpson
Oregon Transportation Commission
355 Capitol Street NE
Salem, OR 97301-3871

Dear Chair Baney and Commissioner Simpson,

On behalf of Portland Public Schools (“PPS”), please submit this correspondence into the public record of the I-5 Rose Quarter project file in response to your letter of May 31, 2019. In the May 31st letter you provide an update on your efforts to convene an executive advisory committee to offer “advice only” on important project changes to, and related impacts from, the I-5 Rose Quarter project that are intended to respond to stakeholder comments. Attached to your May 31, 2019 letter is a copy of your April 29, 2019 Key Outcomes summary based on the “I-5 Rose Quarter Project Conversation.”

In the Key Outcomes document, you plainly agree, “ODOT needs to conduct further analysis on the Rose Quarter project. In particular, more needs to be known about the implications to Harriet Tubman Middle School and more conversations about highway covers, their alignment and structural capacity, all informed by additional engineering expertise, need to occur.” (Emphasis added). The May 31st letter repeats this admission that further study and analysis is needed to understand the real and significant impacts on Harriet Tubman Middle School.

While we appreciate outreach efforts to impacted parties, this outreach and future analysis has come too late in the process and does not alter our legal assessment that the project requires a full Environmental Impact Statement (“EIS”).

As we previously stated during the public comment period, although the proposed project is immediately adjacent to PPS properties, in particular the Harriet Tubman Middle School, neither ODOT nor the City meaningfully engaged with PPS during the planning process to assess the potential impacts, either short-term or long-term, on the health of students and staff from environmental hazards or on the structural integrity of PPS facilities from incursions on PPS property during construction.

We have raised substantial questions about potential impacts on PPS properties, including risks to soil stability under the Harriet Tubman Middle School site during the construction process, increased air pollution, increased noise pollution, and shifts to traffic patterns in the vicinity of both Tubman and District headquarters.

{00900400;1}

Harriet Tubman Middle School recently invested in a state-of-the-art air quality system to protect students in that school from substandard air quality based on adjacency to the existing highway corridor. The PPS investment of over \$17 million cannot protect these students from the already poor outdoor air quality, and this project will further challenge that outdoor air quality in closer proximity to the school.

The May 31st letter and accompanying Key Outcomes document now seem to recognize the nature and significance of these impacts. This impact analysis is not the proper subject matter for an after-the fact, advisory-only committee. Instead, this is the kind of analysis that ODOT has a duty to evaluate in the initial project assessment to determine whether an EIS is justified. ODOT's refusal to adequately address these significant environmental issues and unique populations in the environmental assessment process was in error, and to now ask us to engage in that analysis outside of the EA/EIS process is not acceptable.

Due to the potential significant negative short-term and long-term impacts of the proposed project to PPS property, students, staff, and stakeholders, Portland Public Schools believes that neither ODOT nor the FHWA can legitimately issue a Finding of No Significant Impact (FONSI). As ODOT now seems to agree, additional study and analysis is necessary to understand the full extent of the impacts on PPS property and whether based on those impacts, our PPS property remains a viable and environmentally safe location for our staff, teachers and students.

We appreciated the invitation to meet with you and other stakeholders of ODOT's I-5/Rose Quarter transportation construction project on April 29th. However, we object to ODOT's plans to proceed with the request for proposal (RFP) contracting process associated with this project. Until our request for further environmental analysis and assessment and the concerns expressed on behalf of the Harriet Tubman Middle School and lower Albina community have been addressed, we cannot support this project moving forward.

Therefore, PPS will continue to advocate that the project be subject to an EIS so that we fully understand the short and long-term scope and impacts to this community's health, safety and well-being.

Sincerely,

Scott Bailey
Board of Education, Portland Public Schools

Julia Brim-Edwards
Board of Education, Portland Public Schools

Stephanie Soden
Chief of Staff, Portland Public Schools



Oregon

Kate Brown, Governor

Oregon Transportation Commission

Office of the Director, MS 11

355 Capitol St NE

Salem, OR 97301-3871

July 10, 2019

Portland Public School Board of Education
501 N. Dixon Street
Portland, OR 97227

Dear Ms. Soden:

This is a follow up response to your June 6th letter and the July 3rd response from the Oregon Transportation Commission (OTC) Chair Baney and Commissioner Simpson.

We understand that Portland Public Schools (PPS) is asking for additional analysis of the I-5 Rose Quarter Improvement Project (Project), or at a minimum a better understanding of the analysis that has already been conducted, as it relates to the short- and long-term health of Harriet Tubman Middle School students and staff from environmental hazards such as air pollution and noise and the structural integrity of the PPS facilities. Ensuring the safety of students and staff is a core value that we share, and one that is guiding our approach to this Project. We remain committed to continued collaboration between our agencies to ensure the Project affords positive outcomes for the community and future generations. We have many more opportunities to engage in the future and are committed to working with you and your staff at the school as we move forward.

As we presented to the Portland Public School Board on March 19, 2019, the Project's Environmental Assessment (EA) is based on preliminary design and the physical footprint for the design concept. The preliminary project design evaluated in the EA reflects the recommended design concept from the ODOT and City of Portland 2012 I-5 Broadway Weidler Facility Plan and N/NE Quadrant Plan. The EA follows federal practices for evaluating project effects, including an understanding the impacts at the Harriet Tubman Middle School site.

As project design progresses, we will better understand the specific effects to areas surrounding the project to appropriately plan, design, or mitigate for them. We will also pay special attention to the concerns you have shared with us – environmental, health, and structural integrity – to ensure the mitigation measures described in the EA to reduce potential impacts are carried forward through design and construction. This work will be done in close coordination with interested stakeholders, including PPS.

We too want to ensure students, staff and the surrounding community have safe air to breathe. To best understand air pollutant and GHG emissions, the EA used the most current modeling approaches and traffic data from the regionally-adopted Metro Regional Transportation Plan. The analysis found that, when the project moves forward, future pollutant and GHG emissions will be slightly less when compared to projected levels without the project. The reduction in emissions will be due to improved traffic flow and less idling traffic on I-5 with the project.

We are committed to the reduction of noise pollution. The project, as evaluated in the EA, proposes the construction of a sound wall between I-5 and Harriet Tubman Middle School. The proposed sound wall would reduce the noise level below what it is today, improving the noise environment for students and staff. We will work with PPS during the proposed sound wall design.

The structural integrity of the school also is of utmost importance. The project includes a retaining wall between I-5 and Harriet Tubman Middle School to provide enhanced slope stability and retain the soils in proximity to the school. This is an area where specific PPS collaboration and input will be critical, including collaboration on the soils analysis, retaining wall design type and construction method. In the near term, we plan to perform geotechnical work and collect soil samples to better understand the soil conditions in the vicinity of the school, provide additional data to PPS regarding the slope stability, and inform the retaining wall and sound wall designs. This work will include targeted boring locations on ODOT and PPS property west of the school. Our team will be connecting with you to coordinate this work and request access to the proposed study area, with the intent of completing this work between mid-July and early August to avoid any overlap with the school year.

While we do expect short-term impacts from construction activities such as dust, construction noise levels and traffic delays, the EA identified mitigation strategies for reducing these impacts, such as scheduling construction activities proximate to the school during the summer months, implementing dust control measures and maintaining traffic control to provide accessible, safe and comfortable alternative travel routes for pedestrians and bicyclists, including in the vicinity of the school. Refining and coordinating these mitigation measures will again require significant collaboration between ODOT and PPS.

Moving forward, we are actively working with the Federal Highway Administration (FHWA) to review and respond to the public comments received during the 45-day public review period. These public comments, along with the technical analysis provided in the EA, will inform FHWA's National Environmental Policy Act (NEPA) decision document. We understand that additional coordination with PPS is needed as the Project moves forward and look forward to future conversations to produce positive outcomes for our community, students, staff, and the traveling public. Should you have any questions, please do not hesitate to contact me at megan.channell@odot.state.or.us or 503-731-3087.

Sincerely,



Megan Channell, AICP
Rose Quarter Project Director
ODOT, Region 1



September 3, 2021

Joe Crelier, ARM
Director of Risk Management
Portland Public Schools
501 N Dixon Street
Portland, Oregon 97227

Via email: jcrelier@pps.net

Regarding: Environmental Report – Freeway Widening Project
Harriet Tubman Middle School
2231 N Flint Avenue
Portland, Oregon 97227
PBS Project 25000.203

Dear Mr. Crelier:

PBS Engineering and Environmental Inc. (PBS) has prepared this letter summarizing various environmental safety and health considerations related to the widening of the Interstate 5 (I-5) freeway alongside Harriet Tubman Middle School (HTMS) located at 2231 N Flint Avenue in Portland, Oregon (site).

PROJECT UNDERSTANDING

PBS understands that Oregon Department of Transportation (ODOT) plans to widen the I-5 freeway alongside HTMS, which would include converting a portion of land along the western edge of the school to transportation land use. Current plans include construction of approximately 400 linear feet of new retaining wall along I-5, within approximately 20 feet of the school. Design of the wall is currently ongoing but will reportedly be a 5-foot-diameter secant or tangent pile wall with maximum exposed height of up to 20 feet. ODOT has submitted information related to the proposed design of the widening plan as well as projections relating to potential impacts to the environment surrounding the project.

BACKGROUND

HTMS was built in 1952, originally as Eliot Elementary School. It is situated in the Eliot neighborhood in the Albina area of Portland, just east of I-5. After World War II, Portland residents approved a measure to modernize and construct Portland Public School buildings to address the increase in families to the area as a result of wartime industry. During the war, and particularly after the 1948 Vanport flood, an influx of African Americans moved to Albina. In 1962, I-5 construction cut a wide swath through the Eliot neighborhood, demolishing homes and displacing many citizens, subsequently resulting in a population decrease in the area from the disconnection of the street grid and large increase in commuter cars going through the area.

This acquiring of properties in predominantly African American neighborhoods was all too common whether it be for construction of freeways or for commercial development. While the proposed widening of the freeway corridor does not represent seizing school property per se, it does appear to ignore the historical damage the freeway has caused this neighborhood and ignores the opportunity to make whole some of the damage that was caused.

With respect to future health and safety impacts to HTMS, the ODOT submittal focuses primarily on long-term projections relating to ambient air quality adjacent to the freeway corridor and freeway corridors in general. It is clear that over the last 20 years air quality adjacent to freeways has improved largely due to improvements in tailpipe emission standards and fuel formulations. This trend is compelling and will likely hold true in the long term. These projections, however, do not address likely short-term adverse impacts that could result from an increase in freeway capacity during morning and afternoon commutes when there would likely be more cars idling during periods of heavy traffic. The projections also do not account for possible regressions in both tailpipe emission standards and in fuel formulations. Nor do the progressions consider possible impacts related to climate change. When asked to clarify these specific concerns the ODOT response was incomplete.

One final glaring omission in the ODOT submittal is any recognition of the Environmental Protection Agency (EPA) document "School Siting Guidelines." This document unequivocally shows that freeways and schools do not mix. Freeways present a significant and measurable negative impact to the environment and the locating, or in this case the widening, of freeways in the vicinity of a school building will result in an environment that can harm students.

GEOTECHNICAL CONDITIONS AND POTENTIAL IMPACTS

The site is roughly rectangular except for the southwestern corner, which has been truncated by an adjacent slope along I-5. The slope is approximately 3H:1V (horizontal to vertical), with a maximum elevation of approximately 138 feet above mean sea level on the school property, sloping downward to a retaining wall with a maximum height of approximately 14 feet that supports the slope. The approximately 20-foot-wide area between the school and adjacent slope is paved. Our current understanding is that the school building is supported on pile foundations.

Based on information presented by ODOT during the coordination meeting with Portland Public Schools (PPS) on May 4, 2021,¹ the school rests on approximately 30 feet of fill overlying fine-grained Missoula flood deposits ranging in thickness from approximately 10 to 30 feet, all underlain by alluvial sand deposits.

Under contract with PPS, Rhino One Geotechnical installed three inclinometers and two vibrating wire piezometers at the site and presented the results in an instrumentation monitoring report dated August 2019.² Inclinometer measurements indicated no measurable lateral or vertical movements around the time of installation. The groundwater monitoring indicated an increase in groundwater level in September 2018, from a depth of 40 feet to 35 feet below the ground surface, followed by relatively consistent groundwater levels over the remainder of the monitoring period.

ODOT's preliminary analyses suggest supporting the I-5 freeway widening with a tangent pile wall consisting of one row of 5-foot-diameter drilled shafts. At the time this information was presented to PBS, no tiebacks were deemed necessary to stabilize the wall.

A tangent pile wall consists of a series of vertical, drilled shafts that touch the adjacent piles. The drilled shafts are constructed of concrete and typically reinforced with steel rebar. The shaft is drilled to the target depth, removing

¹ Oregon Department of Transportation (ODOT). (May 4, 2021). PPS Technical Coordination for I-5 Rose Quarter Improvement Project.

² Rhino One Geotechnical. (August 14, 2019). Instrumentation Monitoring Report: August 2019. Portland, Oregon. Prepared for Portland Public Schools. Rhino One Project PPS-2017-010.

soil cuttings in the process. The rebar is typically inserted into the open hole before it is filled with concrete. A secant pile wall is similar to a tangent pile wall, except that in a secant pile wall, piles overlap several inches. In addition, only every other pile may be reinforced with steel rebar.

Tangent pile walls are often used when limiting deformation of the wall is critical, such as when the wall is supporting a structure. In addition, the construction of tangent pile walls involves drilled shafts, as opposed to driven piles, and typically produce lower levels of vibration during construction, which could help limit disturbance or structural damage to the school. In our opinion, given the school is on deep foundations, small magnitudes of deformation of the wall would be less likely to result in structural damage.

Based on information presented by ODOT during the coordination meeting with PPS on May 4, 2021, the existing wall and slope between I-5 and the school is seismically unstable. The new wall system proposed by ODOT would meet the current standard for seismic loading, resulting in an increase in seismic stability of the adjacent slope. Improved seismic stability decreases the risk of failure of the slope during a seismic event, which in turn reduces the risk of structural damage to the school. PBS recommends that the seismic design consider the impact from a 2,500-year earthquake, consistent with the current Oregon Structural Specialty Code, rather than the 1,000-year event, which is typically considered for transportation projects.

For a 400-foot-long, 5-foot-diameter tangent pile wall, with an average exposed wall height of 10 feet and 20 feet of embedment, approximately 2,100 cubic yards of soil would need to be exported. The volume of exported soil would require more than 200 dump truck trips. This assumes a swell factor of 20% and dump trucks with a 10-cubic-yard capacity.

While the ODOT submittal supports the installation of the tangent wall in order to provide increased seismic stability of HTMS, it does not discuss how the original placement of the freeway corridor has compromised the seismic stability of the school and adjacent hillside. It is PBS' opinion that ODOT has an obligation to provide seismic reinforcement of the school building whether or not the freeway is widened.

ENVIRONMENTAL HEALTH AND SAFETY IMPACTS AND PLANNED/POSSIBLE MITIGATION

Construction Period Operations Impacts (Noise, Environmental, Access/Egress)

The installation of retaining wall piles along the border between HTMS and the subsequent widening of the I-5 freeway will be a significant undertaking that will have detrimental short-term impacts on the fundamental utility of HTMS and to the surrounding neighborhood. Use of semi-permanent cranes, the flow of dump trucks and cement trucks through the property, and the mobilization of countless construction workers and their vehicles will at times bring all neighborhood traffic to a standstill. The development of a comprehensive traffic control plan can help attenuate some of these impacts but there will be significant impacts nonetheless.

While some of the project traffic surfacing will be paved, the moving of large quantities of soil will result in the deposition of construction soil on both the school property and the neighboring roadways. Dirt and debris that is tracked off from construction sites is a safety concern and can present an environmental hazard. Use of vehicle tire/wheel washes can reduce soil deposition to the surrounding neighborhood. Chemical analysis of soils on the project have indicated the presence of a variety of contaminants that could be made airborne without the implementation of aggressive dust controls. Any wastewater generated from dust mitigation measures should be captured in order to perform an appropriate characterization of possible environmental contamination.

During the project there will be temporary and semi-permanent impacts to neighborhood traffic depending on the final traffic control plan that is developed and implemented for the project. These will hinder access to the property for students, staff, and parents. These effects will evolve over the course of the project as various phases of the construction are completed. Emergency access and egress to the property for emergency services providers may be hindered as well.

Post-Construction Period Impacts (Noise, Environmental, Access/Egress)

Based upon review of the ODOT submittal, the widening of the freeway will have a minimal effect on the long-term noise levels in and around HTMS. The ODOT submittal goes further and presents noise barrier wall scenarios that will reduce long-term overall noise levels at HTMS. The ODOT submittal does not address the deleterious effects of the current noise levels at HTMS that are the direct result of the existing freeway traffic. Nor does the ODOT submittal address increases in short-term transient noise levels that would be presented during periods of heavier (due to the wider freeway) traffic congestion that will coincide with morning and afternoon commutes. It is unfortunate that these periods of increased traffic congestion will occur at the very times students are outdoors preparing to start their school days and outdoors getting ready to go home.

The installation of sound attenuation barriers along freeways is ubiquitous. They are most often seen in areas where freeways pass through residential neighborhoods. Almost without exception they are masonry panel structures that rise to an elevation of up to 10 feet or more. These systems are effective at deflecting noise generated by freeway traffic. Noise levels aside, these barriers rarely improve the livability of the area being protected. What was once a view of the horizon will become a gray masonry surface that is subject to vandalization, physical damage, long-term maintenance costs, and ultimately end of life replacement. Also, noise barriers work both ways; all noise generated in the vicinity of HTMS will now be reflected directly back to the school building. These noises could include vehicle operations, equipment operations, various warning signals (trucks backing up, fire alarms, car alarms, etc.), children playing, and conversation. The ODOT submittal makes no mention of potential increases in noise levels from noises generated at HTMS.

EXISTING ENVIRONMENTAL CONDITIONS AND POTENTIAL SOIL AND GROUNDWATER IMPACTS

Soil studies on the project have documented chemical contamination of the soil. These levels are generally low. Potential exposures to these chemical contaminants would likely be limited to the duration of construction period operations (see above). Upon completion of the construction project, there would be no significant exposure to existing contaminated soil. All surfaces exposed during the project would be either covered with paving or covered with clean soil that would then be seeded.

ODOT to date has not analyzed groundwater on the site for chemical contamination. Considering the depth to groundwater in the vicinity of the project, it is not likely that the construction operations would create an unacceptable conduit for the mobilization of these soil contaminants into the existing groundwater. As a precaution, before and after construction groundwater samples could be analyzed for those contaminants of concern that have been identified in the soils on the HTMS project.

SHORT-TERM AND LONG-TERM IMPACTS TO AIR QUALITY

Over the past decade, the freeway's effect on air quality in the HTMS vicinity has been extensively studied and shows that there are measurable adverse impacts to the air quality at HTMS. The negative impacts are consistent with the "School Siting Guidelines" document. The ODOT submittal relies on both national projections of air quality parameters around freeways and the findings of an air pollution modeling tool—MOVES. The modeling tool utilizes a variety of parameters to predict air quality trends related to freeway traffic. Parameters entered into

this modeling software include miles driven over the roadway, a profile of vehicles in use, the aging out of older vehicles, fuel types, and quality and weather dynamics including temperature, prevailing wind directions, humidity, and precipitation. To better understand the MOVES air quality predictions, ODOT was presented with the following questions:

ODOT was asked if there was a resolution to the predictions that would allow a person to determine short-term impacts on an hour-by-hour basis because the greatest exposure concerns to students would likely occur during morning and early afternoon hours which coincide with periods of heaviest congestion on the freeway. The ODOT response was that the predictions are more geared toward long-term, average conditions (24-hour averages).

ODOT was asked if the long-term air quality impact predictions were made considering a possible climate change scenario where ambient temperatures were higher. ODOT's response was that speculative parameters were not used but that "Temperature is a very sensitive parameter across all pollutants and vehicle types."

ODOT was asked if the predictions could be separated into narrower time bands; the predictions as presented were for 2045. The ODOT response was that the predictions are more geared toward long-term, average conditions (24-hour averages).

Considering this latest information from ODOT, it is PBS' opinion that the model predictions relating to air quality impacts associated with the I-5 freeway do not provide sufficient resolution to determine if air quality conditions will be better or worse in the short-term or during the times when students would be at greatest risk of environmental exposures associated with the freeway.

CONCLUSIONS AND RECOMMENDATIONS

At this time, it is PBS' opinion that the I-5 freeway presents an unacceptable air quality and noise risk to the safe and healthful operation of HTMS and that the widening of the freeway will not change this.

Based upon review of the ODOT submittal, it is clear that any increase in noise to HTMS associated with the widening project will be minor and easily mitigated. It should be understood, however, that current freeway noise near HTMS is significant and that these impacts will continue despite installation of the proposed noise barriers.

PBS sees no compelling information to indicate that there would not be short-duration adverse air quality impacts to HTMS resulting from the widening of the freeway. It is possible that air quality conditions at 8:00 am and at 3:00 pm during school days will be worse at HTMS because of this project.

ODOT has recognized that the current shoring system between HTMS and the freeway is unstable. This condition is the result of the original establishment of the freeway and should be corrected whether the freeway is widened or not.

If you have any questions regarding this information, please call me at your convenience. I can be reached at 503.417.7597 or douglas@pbsusa.com with any questions or comments.

Sincerely,

Douglas Hancock, CIH, CSP
Senior Project Manager

DH:mo



Harriet Tubman Middle School
Indoor and Outdoor Air Quality Health Risk Assessment

Prepared by
William Lambert, PhD
August 19, 2019

1.0 Executive Summary

The design and installation of the HVAC system for Harriet Tubman Middle School was developed out of concern for the health of students and staff. Portland Public Schools recognized that the outdoor air at the school was impacted by traffic-related air pollution from I-5, and potentially by area industry. Preliminary air monitoring conducted in March and April of 2018 confirmed the need for an HVAC system with filtration for particles and gases to prevent sustained daily exposure. Renovation of the school building and installation of the HVAC system was completed in August. To evaluate the performance of the particle filters and the charcoal sorption bed, a new round of monitoring was conducted in September and October, with measurements made at the air intake and within the air handling units of the HVAC system. These measurements confirmed that the HVAC system achieved protective levels of indoor air quality at the time of occupancy. A third round of monitoring was conducted at the end of the school year, in April and May of 2019. Measurements at this time confirmed the HVAC system continued to provide a high level of removal of particles and gases.

This report provides an analysis of the adequacy of the HVAC system to minimize the health risks posed by air pollution at Harriet Tubman Middle School. The measurements of the various components of traffic-related air pollution are evaluated against available federal and state air quality standards, and published governmental and scientific literature. The report also evaluates the potential health risks from exposure to outdoor air pollution during physical education and lunch periods.

The five key conclusions from the health analysis are:

1. Indoor levels of air pollution are very low. For each of the pollutants monitored, the filtered air delivered to the classrooms and interior spaces of the school is clean, safe and supportive of health for students and staff.
2. Particle and gas removal by the HVAC system and its filtration systems remained consistently high across the school year.
3. Outdoor levels of particulate matter (PM₁₀, and PM_{2.5}) and the gases carbon monoxide (CO) and nitrogen dioxide (NO₂) are below federal air quality standards, and therefore pose no concern for health during physical activities.
4. Certain pollutants associated with diesel exhaust (ultrafine particles and black carbon) were observed at elevated levels typical of locations near heavily travelled highways. The HVAC system provides a high level of protection against exposure in the classrooms and interior of the building.
5. The health risks of short-term exposures to diesel pollution are not known, and regulatory limits have not been established. However, sufficient toxicological and epidemiological evidence exists to recommend that outdoor physical education activities be scheduled in the later morning and afternoon when traffic pollution is much lower. This recommendation is made with an abundance of caution, recognizing that some students, such as those with asthma, may be more susceptible to adverse effects of traffic-related air pollution.

2.0 Introduction

Increasing public health attention to traffic-related air pollution (TRAP) compelled Portland Public Schools (PPS) to design and install a heating, ventilation, and air conditioning (HVAC) system with filtration for particles and gases during the modernization of Harriet Tubman Middle School. The predominant concern was the reduction of day-to-day exposures to TRAP that have been associated with reduced lung growth in children, and increased risk for the development (onset) of asthma and exacerbation (triggering) of asthma attacks. The commitment to install the HVAC system by PPS also acknowledged emerging health research concerns for individual components of TRAP, specifically diesel particulate matter. Extensive air monitoring studies were conducted by scientists from Portland State University to characterize the outdoor air quality and confirm the adequacy of the performance of the HVAC filtration system to provide clean air to classrooms and indoor spaces at the school. Air quality measurements were first made in the April 2018, and were conducted again in the September and October following installation of the HVAC system and building occupancy. Another cycle of measurements was made in April and May of 2019 to evaluate outdoor-indoor conditions after 7 months of air handling system operation.

The PSU team conducted a monitoring on a comprehensive set of individual pollutants that comprise TRAP. The set of pollutants include the “criteria pollutants” carbon monoxide (CO), nitrogen dioxide (NO₂), particulate matter (PM₁₀ and PM_{2.5}) whose health effects are widely recognized and for which federal regulatory standards exist (NAAQS Table). Ultrafine particles (UFP), black carbon (BC), and volatile organic compounds (VOCs) are constituents of diesel exhaust and these forms of PM were also monitored. Specific air quality standards do not exist for these diesel pollutants, however, evidence from animal toxicology research and ongoing epidemiologic studies support concern for children as particularly susceptible to the adverse respiratory effects of long-term exposure to diesel particulate pollution (HEI 2010; HEI 2013; Guarnieri and Balmes 2014).

This report provides an opinion on the health risks posed to students and staff at Harriet Tubman Middle School using the measured exposures in outdoor and indoor air. This analysis follows a weight-of-evidence approach that applies federal health-based standards when available, and applies information from published studies for pollutants which lack regulatory guidelines.

3.0 Carbon Monoxide

3.1 Relevant Background

Carbon monoxide (CO) is a toxic asphyxiant gas that is hazardous because of its specific ability to bind to hemoglobin and to reduce the ability of the blood to deliver oxygen to tissues. As a component of motor vehicle emissions, CO penetrates to indoor spaces with high efficiency because this gas has very low chemical reactivity. These same physical and chemical properties limit engineering abilities to economically remove CO gas when present in the intake air of building ventilation systems. To protect public health, regulatory emphasis has been placed on reducing CO emissions from motor vehicles through the cleaner formulations of gasoline fuels, motor/vehicle inspection maintenance programs, and reducing emissions from wood stoves, fireplaces, open burning, and industrial sources. CO trends

for Oregon and Portland have steadily declined over the past 5 decades and currently the second highest 8-hour average occurring in a year is less than 2 ppm (<https://www.oregon.gov/deq/FilterDocs/2017aqannualreport.pdf>). Although CO from motor vehicle emissions disperses quickly under most conditions, poor traffic flow and congestion can lead to elevated exposures for motor vehicle occupants and persons in close proximity to highways. CO concentrations measured at microscale sites have declined in the same proportions as concentrations recorded at monitors representing larger urban regions. Ambient monitoring at near-road locations indicate that the federal standards are not exceeded, and this protection is attributed to greatly improved control of motor vehicle emissions (e.g., clean burning fuels, improved light-duty engine design, and catalytic convertors). Measurements of ambient CO at the Oregon DEQ I-5 Tualatin near-roadway air monitoring station have not recorded exceedances of federal standards during 2015 to 2017 (maximum 8-hour averages = 1.4 ppm).

The health risks of CO have been long recognized and CO is one of the original six “criteria” air pollutants defined in the Clean Air Act of 1970. The current National Ambient Air Quality Standard (NAAQS) for carbon monoxide is 35 ppm over a 1-hour averaging time and 9 ppm over an 8-hour averaging time (<https://www.epa.gov/criteria-air-pollutants/naaqs-table>). These levels are based on an extensive evidence base from epidemiologic studies and controlled exposure studies on human subjects (<https://cfpub.epa.gov/ncea/risk/recordisplay.cfm?deid=218686&CFID=78776911&CFTOKEN=81884369>). The two averaging times prevent blood carboxyhemoglobin levels from reaching 2%, the level at which chest pain (angina pectoris) is triggered in exercising adults with coronary artery disease, and to protect pregnant women and the developing fetus from hypoxic stress and low birth weight outcomes. As a point of reference, carboxyhemoglobin concentrations in cigarette smokers range from 3-8% and symptoms of intoxication and acute poisoning generally appear above 20%, although symptoms and clinical states of acute CO poisoning correlate poorly with level of carboxyhemoglobin (Raub 2000).

3.1.2 HTMS Outdoor and Indoor Levels

The distribution of school-day average CO concentrations during Portland State University’s Phase II (September-October) and Phase III (April-June) monitoring periods is presented in Figure 1. During the Fall, outdoor carbon monoxide levels averaged 0.4 ppm (432 ppb) over the 9 AM to 4 PM school day. The maximum school-day average was 1.4 ppm (1434 ppb). 95 percent of the outdoor air school-day averages in the Fall were below 0.6 ppm (639 ppb).

In the Fall, measurements of CO levels at the supply air point of the HVAC system, representing air that has been filtered of particles and passed through the charcoal bed, contained substantially lower concentrations of CO relative to the outdoor air. Approximately 44% removal was observed. However, measurements of the return air were essentially equal to the concentrations measured in outdoor air, suggesting CO infiltration through the building envelope.

In the Spring, the outdoor average level was 0.09 ppm (90.8 ppb), considerably lower than the Fall average. 95% of the school-day averages were below 0.2 ppb (236 ppb). Concentrations in the supply air were identical with the outdoor air. Although CO has not been removed from the air supplied to the

interior space of the school, these levels are below the NAAQS of 9 ppm averaged over 8 hours. Measurements of CO in the return air, representing the mixed air of the entire interior of the school, averaged 0.07 (73.9 ppb). This small difference in the air concentration is not appreciable, and is supportive of improved balancing of air delivery and minimization of infiltration in the Spring.

3.1.3 Implications for Health

Although the levels of CO in outdoor air were higher in the Fall than in the Spring, these school-day average levels of 0.4 ppm and 0.2 ppm are well below the NAAQS 9 ppm 8-hour average. Even the highest school-day average of 2.2 ppm is only one-fourth the level of the NAAQS. Thus, exposures of students and staff to CO at Harriet Tubman Middle School do not differ from those expected to be received at their residences or during commuting.

Measurements of ambient CO in the Portland area by the Oregon DEQ at Portland monitoring stations and do not exceed the NAAQS. For example, during 2008-2017, maximum 8-hour averages measured by the DEQ at the SE Lafayette neighborhood site ranged from 1.3 to 3.1 ppm, and for the near-roadway site at Tualatin I-5 during 2015-17 maximum 8-hour averages range from 1.3 to 1.4 ppm (Oregon Air Quality Annual Report 2017).

In summary, the monitoring data from Fall 2018 and Spring 2019 at HTMS confirm that concentrations of CO are consistently low and do not present a health risk to students and staff.

3.2 Nitrogen Dioxide

3.2.1 Relevant Background

Nitrogen dioxide (NO₂) is an irritant gas that combines with water on respiratory tract tissues to form nitric (HNO₃) and nitrous (HNO₂) acids. When inhaled in high concentrations, NO₂ results in edema and bronchopneumonia. At lower concentrations, short term (acute) exposures to NO₂ are associated with exacerbation of asthma caused by the constriction of the smooth muscle of the conducting airways and increased mucous production. Longer term exposures at low levels are associated with the development of asthma in children. The health effects of NO₂ are well documented in experimental studies in animals, and in controlled human exposure and epidemiologic studies (<https://cfpub.epa.gov/ncea/isa/recordisplay.cfm?deid=310879>). As a chemical class, nitrogen oxides are principal components of motor vehicle emissions, and NO₂ is specifically regulated as a criteria pollutant under the Clean Air Act. In recognition of the need to protect against both acute and chronic exposures, the current NAAQS for NO₂ are 100 ppb averaged over 1 hour and 53 ppb averaged over 1 year (<https://www.epa.gov/criteria-air-pollutants/naaqs-table>).

Over the past decade, Oregon DEQ monitoring data at the Portland neighborhood site, highest hourly averages of NO₂ have been near 40 ppb (<https://www.oregon.gov/deq/FilterDocs/2017aqannualreport.pdf>). Over 2015 to 2017, the daily maximum concentrations from the I-5 near-roadway station in Tualatin has also tracked in the 35-40 ppb range. Thus, the maximum concentrations measured at urban locations in Portland are well below

the federal standard of 100 ppb. Similarly the annual NO₂ average for the neighborhood and near-roadway monitoring sites has consistently tracked near 10 ppb and 13 ppb, respectively; also well below the federal standard of 53 ppb.

3.2.2 HTMS Outdoor and Indoor Levels

The distribution of school-day average NO₂ concentrations during the Fall and Spring monitoring periods is presented in Figure 2. In the Fall, outdoor NO₂ levels averaged 13.0 ppb over the 9 AM to 4 PM school day. The highest school-day average was 67.6 ppb. 95 percent of the daily averages were below 30 ppb, and 75 percent were below 20 ppb. The mean supply air average was 0.89 ppb, indicating a high level of removal by the air handling system. The mean NO₂ levels in return air was 6.92 ppb. Despite the apparent infiltration of outdoor NO₂ through the building envelope, indoor NO₂ levels are approximately one-half of the levels observed in outdoor air.

In the Spring monitoring period, the school-day average of 7.3 ppb was substantially lower than concentrations observed in the Fall. Supply air concentration averaged 2.8 ppb, again indicating substantial removal by the HVAC system. Return air NO₂ concentrations averaged 0.9 ppb, substantially lower than the supply air and possibly indicating reaction of NO₂ with indoor surfaces and occupants.

Outdoor NO₂ levels measured by passive samplers placed on the school grounds, the adjacent city park, and neighborhood streets provided one-week average measurements that were comparable to the levels measured in outdoor air at the HVAC intake unit, and demonstrated reductions in levels with increasing distance from the I-5 highway.

3.2.3 Implications for Health

NO₂ is not simply an indicator of other traffic-related pollutants, and this oxidant gas has independent effects on the respiratory system. High short-term exposures are associated with asthma attacks, and with bronchoconstriction and airway inflammation. These health effects are observed independent of other traffic-related pollutants, such as PM_{2.5} and black carbon. Further, repeated and persistent exposure to NO₂ across years results in the development of allergic responses and structural changes to the airways of the child, damaging lung growth. Because the respiratory effects of NO₂ appear to occur across both short- and long-term time scales, the U.S. EPA developed standards for both 1-hour and annual averaging times to provide protection against triggering asthma attacks, and against asthma development.

Indoor concentrations of NO₂ in the school, as represented by the levels measured in return air to the HVAC system in the Fall and Spring, averaged 6.9 and 0.88 ppb, respectively. These school levels are very low relative to the 1-hour standard of 100 ppb and the annual standard of 53 ppb, and are likely lower than levels of exposure experienced by students and staff in their homes and neighborhoods.

Outdoor concentrations averaged 13 ppb across the 9 AM to 4 PM school day in the Fall and 7 ppb in the Spring. These levels are higher than neighborhood background and reflect the influence of traffic

emissions from I-5, but they are well below the federal standards of 100 ppb 1-hour average and 53 ppb annual average.

The maximum school-day average concentration was 67.6 ppb in the Fall of 2018, and 75% of school-day averages during this monitoring period were less than 20 ppb. These levels are substantially lower than the concentrations known to trigger changes in lung function and symptoms in panel studies of asthmatic children (U.S. EPA *Integrated Science Assessment for Nitrogen Oxides*, 2016). The concentrations associated with increased airway responsiveness range from 200 to 300 ppb for 30 min, and 100 ppb for 1 hour. The concentrations associated with allergic inflammation are 581 ppb for 15 min and 260 ppb for 30 min. Therefore, the observed levels of NO₂ in outdoor air surrounding the school buildings and the park are below levels of concern for this susceptible group of children.

3.3 Particulate Matter

3.3.1 Relevant Background

As type of air pollution, particulate matter (PM) includes finely divided solid and liquid materials that are suspended and move in the air. The size distribution of particles can vary greatly, and the mixtures of depend on the types of sources. The smaller size classes of particles are of greater health concern because they have the capability to bypass the normal defenses of the upper respiratory tract and can be inhaled deeply into the lungs where they can be deposited and cause harm.

Two principal classes of particle sizes are used in federal air pollution standards: “PM₁₀” which are particles smaller than 10 microns in diameter and able to be inhaled through the nose. Soil dust, pollen, and mold particles are in this size range. “PM_{2.5}” is comprised of particles that are 2.5 microns and smaller, and includes the class of particles that are called “fine” (diameters of 0.1 to 2.5 μm) and “ultrafine” (0.01 to 0.1 μm). Combustion processes generate this size fraction, and some of the fine and ultrafine particles of PM_{2.5} may contain liquid acid condensates, organic compounds, and heavy metals, increasing their toxic potential. The health effects of particulate matter include respiratory system irritation, lung damage, the development of chronic obstructive pulmonary disease (COPD), and heart attacks (U.S. EPA. *Integrated Science Assessment for Particulate Matter (External Review Draft)*, 2018).

Particulate matter air pollution is measured as weight (mass) per cubic meter of air, and the federal standards are defined using these units. The NAAQS for PM₁₀ is 150 micrograms per cubic meter (μg/m³) averaged over a 24-hour period. The NAAQS for PM_{2.5} is 35 μg/m³ averaged over a 24-hour period and 12 μg/m³ averaged over one year.

3.3.2 HTMS Outdoor and Indoor Levels

The school-day average levels of outdoor PM₁₀ were relatively low during the Fall monitoring period (Figure 3). At this time, PM₁₀ averaged 2.58 μg/m³ with an interquartile range of 1.40 to 3.30 μg/m³. PM₁₀ concentration in the supply air averaged 0.14 μg/m³ indicating high removal capacity by the HVAC filtration system. A small increase of PM₁₀ was observed in the return air, which averaged 1.20 μg/m³, and can be attributed to re-suspended interior dust and infiltration. Outdoor PM₁₀ levels were higher in

the Spring, with average levels at 7.39 $\mu\text{g}/\text{m}^3$ and an interquartile range of 5.28 to 9.33 $\mu\text{g}/\text{m}^3$. High removal efficiency was observed again; supply air concentrations of PM_{10} averaged 3.08 $\mu\text{g}/\text{m}^3$ and the return air average concentration were essentially the same at 3.11 $\mu\text{g}/\text{m}^3$. In summary, the outdoor levels of PM_{10} are considerably lower than the 150 $\mu\text{g}/\text{m}^3$ per 24-hour average NAAQS, and the school's HVAC system effectively filters PM_{10} to very low indoor levels.

Outdoor air concentrations of $\text{PM}_{2.5}$ were also consistently low in both the Fall and Spring (Figure 4). In the Fall, $\text{PM}_{2.5}$ averaged 2.13 $\mu\text{g}/\text{m}^3$ with an interquartile range of 1.06 to 2.86 $\mu\text{g}/\text{m}^3$. Thus, outdoor levels are below the NAAQS of 35 $\mu\text{g}/\text{m}^3$ 24-hour average and 12 $\mu\text{g}/\text{m}^3$ annual average. In the Spring, $\text{PM}_{2.5}$ averaged 2.69 $\mu\text{g}/\text{m}^3$ with an interquartile range of 1.25 to 3.85 $\mu\text{g}/\text{m}^3$. Effective removal capacity of $\text{PM}_{2.5}$ by the HVAC system was observed in both seasons. Return air concentrations averaged 0.72 $\mu\text{g}/\text{m}^3$ in the Fall and 0.71 in the Spring, demonstrating very low $\text{PM}_{2.5}$ exposures to building occupants.

3.3.3 Implications for Health

Both PM_{10} and $\text{PM}_{2.5}$ in outdoor air were measured at concentrations below the federal standards in both the Fall and Spring seasons, supporting the conclusion that particulate matter pollution from I-5 does not present a health hazard for students and staff. The HVAC system was specifically designed to remove particles in this inhalable and respirable size range, and large removal efficiencies were observed in both monitoring seasons, providing evidence of air handling system stability across the entire school year. Because students are in the filtered indoor environment during the majority of the school day, their total exposure to particulate matter is likely reduced relative to the exposures they would have received at their residences full-time.

The potential health risks associated with short-term particulate matter exposure during outdoor activities must be considered. The U.S. EPA's *Integrated Science Assessment for Particulate Matter (2018)* combines the evidence from controlled animal studies employing short-term exposures on markers of lung injury and oxidative stress. These toxicological studies provide insight into the potential mechanisms of respiratory health effects (biological plausibility) and assist with the interpretation of epidemiologic evidence. While multiple studies of long-term $\text{PM}_{2.5}$ exposure provide coherent evidence to support a causal role in the development of asthma in children, the evidence to support short-term effects on asthma attacks is much more limited. Collectively, the available epidemiologic studies on children with asthma in U.S. cities provide weak support for aggravation of asthma symptoms at 24-hour average concentrations typically experienced in urban areas. The shared limitations of these studies include reliance on self-reported symptoms, incomplete adjustment for co-occurring pollutants, use of modelled personal exposure from central monitoring sites, and the potential for the constituents of $\text{PM}_{2.5}$ (elemental carbon, ultrafine particles), rather than $\text{PM}_{2.5}$ mass itself, to explain the observed outcomes. Further, the ambient concentrations in these studies are substantially higher than levels observed outdoors at the school where average school-day $\text{PM}_{2.5}$ levels in the Fall of 2018 were 2.13 $\mu\text{g}/\text{m}^3$. Mean 24-hour $\text{PM}_{2.5}$ concentrations are greater than 15 $\mu\text{g}/\text{m}^3$ in studies of emergency department visits and hospital admissions for asthma (Sarnat et al. 2015; Ostro et al. 2016), and those studies considering respiratory symptoms and asthma medication (Rabinovitch et al. 2006; Mann et al. 2010; Spira-Cohen et al. 2011).

In summary, the outdoor concentrations of PM₁₀ and PM_{2.5} at HTMS are below federal standards, and are safe for students and staff, including those with asthma. The school's HVAC system further reduces these concentrations to create an indoor environment which has very low levels of PM₁₀ and PM_{2.5} pollution.

3.4 Black Carbon

3.4.1 Relevant Background

Black carbon (BC) is an important component of particulate matter, and is emitted during the combustion of biomass and fossil fuels. In particular, BC in the ultrafine particle fraction is used as a marker of diesel exhaust and is argued to be a useful alternative measure to particle mass (PM₁₀ and PM_{2.5}) because health risks may be qualitatively and quantitatively different due to unique physical and chemical properties of BC (Jannsen et al. 2011). Diesel exhaust is a complex mixture of gases and ultrafine particles of a diameter less than 0.1 µm. No single chemical constituent of diesel exhaust can serve as a unique marker of exposure (Grahame, Klemm, and Schlessinger 2014), but taken together, fine particles (PM_{2.5}), BC, ultrafine particle counts provide a reasonably complete characterization of diesel exhaust levels.

The available epidemiologic evidence on the health effects of diesel exhaust goes back to the 1990s but the studies are challenging to interpret because exposures are not precisely quantified. Further, the studies were conducted in occupational settings and on healthy adult male workers, therefore the levels of exposure are above the range observed in the community setting and must be extrapolated with some uncertainty to women, children, and the elderly. Although no federal air quality standard for BC or diesel particulate matter exists, the health hazard is recognized (Health Effects Institute, 2015). The health endpoint of regulatory concern has been lung cancer and risk assessments are based on lifetime exposure scenarios. However, the U.S. EPA and the World Health Organization have withdrawn their previously published unit risk estimates, ostensibly because the most appropriate metric to represent diesel exhaust exposure remains unknown. PM_{2.5} elemental carbon (EC) has been used as a surrogate to date, but it is not expected that EC itself is the toxicologically active agent. In 2010 and again in 2016, the Oregon Air Toxics Science Advisory Committee (ATSAC) reviewed the available literature on diesel particulate matter and recommended an Ambient Benchmark Concentration (ABC) of 0.1 µg/m³ (equivalent to 100 ng/m³) which is very close to these previous risk estimates of the EPA and WHO, and assumes 70-year exposure duration and risk of 1 excess cancer in 1 million persons. This ABC was adopted by the Oregon Environmental Council in 2017, and provides a point of reference for evaluating potential health risk.

The possible effects of exposure to BC on neurodevelopment and cognition in school children have also been the subject of recent research efforts in Europe and the U.S (Basagana et al. 2016; Harris et al. 2016; Forns et al. 2017). These studies are motivated by the observation of translocation of ultrafine and fine particles from the lungs to the central nervous system in animal toxicology studies (Elder et al. 2006). The BREATHE Program in Barcelona, Spain followed 2,687 children in 265 classrooms in 39 schools, assessing attention with a computer-administered neurobehavioral test. Classrooms in these

schools are naturally ventilated and the penetration of outdoor PM_{2.5} and NO₂ to the schools' indoor areas is high (Amato et al. 2014), and means that school children are exposed to elevated levels throughout the school day, indoors and outdoors. In the Barcelona classrooms, the mean NO₂ level was 15.8 ppb (11.9-18.9 ppb interquartile range) and the mean PM_{2.5} elemental carbon was 1270 ng/m³ (980-1240 ng/m³ interquartile range). EC is measured using a thermal-optical transmittance, and BC is measured by optical reflectance - aethelometer. The BC:EC correlation is approximately 3:1 and varies with the source of soot emissions (Jeong et al. 2004). Converting the Barcelona EC values to BC yields 3810 ng/m³ (2940-3720 ng/m³ interquartile range). In another BREATHE publication, Sunyer et al. (2017) reported lower performance on attention tests for school children in the top exposure quartile of daily classroom EC and NO₂ relative to those in the bottom exposure quartile over a 12-month period. Basagana et al. (2016) reported reductions in cognitive growth in working memory and attentiveness across quartiles of classroom PM_{2.5}, but these effects were not observed for EC or other measures of particulate matter. The most recent Barcelona publication by Forns et al. (2017) demonstrated that deficits in working memory and inattentiveness persisted over 3.5 years of follow-up and were associated with outdoor NO₂ and indoor (classroom) ultrafine particle counts, but not EC.

The Project Viva Cohort Study in eastern Massachusetts followed children from pre-birth to 8 years of age (Harris et al. 2016). Residence location was used to model exposure to outdoor BC and PM_{2.5}. Children with higher mid-childhood exposure to BC and increased near-residence traffic density had greater problems with behavioral regulation as assessed by teachers, but no relationship was observed using parent report measures. The methods used in this report are similar to those of a 2008 analysis of Boston children (Fraco Suglia 2008). BC exposures were retrospectively estimated with a land-use regression model for 218 children in a cohort study for which neurocognitive assessments were available. BC was associated with decreased cognitive function across measurements of verbal and nonverbal intelligence, and memory.

In summary, the body of evidence for the independent effect of BC on cognitive development and function in children provides mixed evidence to support a causal hypothesis. The most reliable evidence comes from the Barcelona BREATHE Program which utilizes direct measurements of EC at schools, which is superior to the reliance on estimated exposure from land-use models used in other studies. The associations with cognitive deficits reported in the set of BREATHE papers suggests that traffic-related pollution as a whole is responsible for the observed neurodevelopmental effects. It is important to recognize that the schools and classrooms in the Barcelona studies rely on natural ventilation and indoor levels of pollutants are similar to those outdoors. In contrast, the HVAC system at Harriett Tubman Middle School effectively removes the fine particles and BC from traffic emissions and eliminates the hazard posed by sustained exposure to traffic air pollution throughout the school day.

3.4.2 HTMS Outdoor and Indoor Levels

The distributions of BC concentrations in outdoor air, and the supply and return air locations in the HVAC system are presented in Figure 5. Levels of BC in outdoor air were appreciably higher in the Fall 2018 monitoring period than during the Spring of 2019, with mean school-day concentration averaging 1399 ng/m³ and an interquartile range of 757 to 1925 ng/m³. In the Spring, mean school-day average BC

was 829 ng/m³, with an interquartile range of 290 to 1127 ng/m³. Thus, outdoor levels in both seasons exceeded the Oregon ABC. In both monitoring seasons, the HVAC system demonstrated large removal efficiencies for BC; approximately 95% in the Fall and 86% in the Spring. Very tight distributions of values were observed in the Spring for supply and return air, evidence of very good HVAC system performance.

In the Spring monitoring, BC was measured with a handheld aethelometer in the park and other outdoor areas surrounding the school, during lunchtime and afternoon hours. Median levels were comparable to those measured at the HVAC intake, ranging from 457 to 725 ng/m³. The median neighborhood background level, measured several blocks to the east of the school, was 333 ng/m³.

3.4.5 Implications for Health

The outdoor concentrations of BC at HTMS are within expected ranges, and resemble distributions of BC measured in recent years at Oregon DEQ monitoring sites in Portland (Figure 6). The distribution of one-hour BC concentrations at the Portland North Roselawn neighborhood site measured during 2010 to 2016 had a mean of 718 ng/m³. At the Portland SE Lafayette over 10 months in 2010, a very similar distribution and mean of 745 ng/m³ was observed. BC monitoring at the Tualatin I-5 near-roadway site over 2014 to 2016 averaged 1293 ng/m³. In comparison, the Fall season outdoor average at HTMS was 1623 ng/m³ and in the Spring was 829 ng/m³. This comparison shows that outdoor levels of BC at HTMS are higher than residential neighborhood background levels in Portland, and are very similar to those measured at the DEQ near-roadway monitoring station, even though this DEQ site is a relatively long distance away in Tualatin.

Indoor BC exposure levels, as represented by return air concentrations, are very low, indicating a high level of protection for students and staff, with average school-day concentrations of 233 and 158 ng/m³ in the Fall and Spring, respectively. While these indoor levels are higher than the 100 ng/m³ ABC, they are within the uncertainty bounds of the risk estimate used to set this guideline, and the protection achieved by the HVAC system is very high. During the indoor time of the school day, students and staff experience lower exposures than they would likely receive in their homes or during commuting.

3.5 Ultrafine Particles

3.5.1 Relevant Background

As described earlier in Section 3.3, particulate matter (PM) is regulated in two size ranges, PM₁₀ and PM_{2.5}. PM₁₀ is the total mass of particles less than 10 micrometers (microns or μm) in aerodynamic diameter. Similarly, PM_{2.5} is the mass of particles less than 2.5 μm in diameter. PM_{2.5} is also called *fine* particle mass. PM₁₀ minus PM_{2.5} gives the *coarse* particle mass. Ultrafine particles (UFP) represent that size fraction of particulate matter less than 0.1 μm in diameter. Because the individual particles in UFP have very little mass, other measures such as particle count and surface area have been used for toxicity testing in animal experiments.

Ultrafine particles are poorly soluble and when they deposit by diffusion they readily pass into epithelial tissues because of their tiny dimensions. If deposited in the nasal passages, these particles can translocate through the olfactory nerve into the brain. When deposited in the respiratory tract, UFP can pass via blood or lymph, where they can distribute to other organs of the body, such as the heart.

The physical and chemical properties of PM vary greatly, and toxicity of the mixture of particulate matter is determined by size, chemical composition, and solubility. This is a major source of variability in the effects for particulate matter, where mass is used as the metric of exposure. For example, the PM_{2.5} mass contains the mass of the UFP fraction, but this mass is relatively small compared to the weight of particles in the PM_{2.5} – PM_{0.1} fraction, and PM_{2.5} mass does not accurately represent the presence of UFP. Thus, the use of particle counts to represent UFP exposure and dose has gained favor. Certainly, the application of a single set of federal air quality standards has practical advantages for monitoring and regulation, but the PM₁₀ and PM_{2.5} standards are acknowledged to have limitations for public health protection. Epidemiologic studies of the effects of UFP have only recently been conducted, and the evidence for independent health effects of UFP is limited (HEI Panel on the Health Effects of Traffic-Related Air Pollution, 2010; HEI Review Panel on Ultrafine Particulates, 2013; Weichenthal et al. 2017).

3.5.2 HTMS Outdoor and Indoor Levels

Figure 7 presents the distribution of ultrafine particle counts for outdoor air, and supply and return air points in the HVAC system. Mean UFP counts are averaged over the 9 AM to 4 PM school day. In the Fall, UFP counts averaged 24908 particles/cm³, with an interquartile range of 17949 to 27170 particles/cm³. The HVAC system removed these particles very efficiently; the average count in supply air was 1484 particles/cm³ and the return air was 1067. A walking transect conducted inside the school yielded a mean count of 461 particles/cm³ and an interquartile range of 264 to 498 particles/cm³. Much lower counts were measured in outdoor air during the Spring monitoring period. The mean was 829 particles/cm³, with an interquartile range of 290 to 1127 particles/cm³. Particle filtration by the HVAC system continued to perform efficiently in the Spring, with mean supply air counts of 117 particles/cm³ (interquartile range 62-151 particles/cm³) and mean return air counts of 158 (interquartile range 107 to 156 ng/cm³).

The PSU air monitoring team conducted walking transects in Lillis Albina Park and outdoor areas surrounding the school on two days in the Fall monitoring period and two days in the Spring. Particle counts were higher in the Fall than the Spring. A summary of the relative concentration magnitudes for Fall is presented below:

| Location | Time | Ultrafine Particle Counts (median, particles/cm ³) | |
|----------|-----------------------|--|------------|
| | | Wed Oct-10 | Wed Oct-15 |
| Park | Morning 8-9 AM | 13,000 | 39,000 |
| Park | Morning 9-10 AM | 26,000 | 43,000 |
| Lunch 1 | Noon hour 11:15-12 PM | 10,000 | 15,000 |
| Lunch 2 | Noon hour 12-12:45 PM | 8,000 | 16,000 |
| Park | Afternoon 1-2 PM | 13,000 | 14,000 |

| | | | |
|------------------------|------------------------|-------|-------|
| Dismissal on Flint Ave | Afternoon 3:30-4:15 PM | 6,800 | 6,600 |
| Neighborhood | Afternoon 4:15 & later | --- | 5,400 |

Two patterns are evident in this table. First, substantial day-to-day variation is observed. Second, UFP counts are highest in the morning hours on both days, and drop substantially by the first lunch period. This hourly profile may be attributed to reduced traffic emissions on I-5 as the morning rush hour ends, and because of warming atmospheric temperatures and increasing wind speed (Zhu et al. 2006). This outdoor pattern is evident in Figure 8 which presents the median UFP counts for the Spring monitoring period by outdoor location and time of day.

3.5.3 Implications for Health

Although air quality regulations currently do not address UFP, this class of submicron-sized particles may exert greater toxic effects compared with larger particle because of their greater surface area/mass ratio, chemical composition, deeper lung penetration, and ability to translocate to the systemic circulation and other organs. A recent workshop concluded that the current evidence base does not differentiate the effects of UFP from other particle size fractions and gaseous pollutants (Baldauf et al. 2016). The limited available epidemiologic literature focuses on adult respiratory and cardiac outcomes, and mortality. Studies considering children are beginning to be reported. For example, prenatal UFP exposure was associated with asthma onset by age 6 years in a recently published study from Ontario, Canada (Lavigne et al. 2019).

The lack of epidemiologic evidence and regulatory standards for UFP precludes a quantitative assessment of the health risks in the outdoor air surrounding the school. However, avoidance of sustained exposures to UFP counts exceeding 25,000/cm³ seems advisable based on acute physiologic changes in blood pressure and micro-vascular function observed in exercising women exposed to high levels of traffic-related air pollution for short periods (Weichenthal, Hatzopoulou, and Goldberg 2014). While these physiologic changes are of uncertain health significance at this time, they do suggest the body is showing an oxidative stress response, and this would be expected to also occur in children.

UFP levels in the range of 25,000 particles/cm³ were observed in outdoor areas surrounding Harriet Tubman Middle School during the morning hours of the Fall monitoring period. While the health risks of short-term exposures UFP are not known, and regulatory limits have not been established, sufficient toxicological and epidemiological evidence exists to recommend that outdoor physical education activities be scheduled in the later morning and afternoon when traffic pollution is much lower. This provides a margin of safety for students and staff who may be more sensitive to the adverse effects of traffic pollution (i.e., asthmatics).

3.6 Volatile Organic Compounds

3.6.1 Relevant Background

Volatile organic compounds are emitted as gases during combustion of gasoline and diesel fuels, and they are also emitted from indoor sources, including building materials and furnishings, office

equipment, and cleaning products. In fact, the concentrations of many VOCs are higher in indoor residential settings and public buildings, than outdoors (U.S. EPA Team Study, 1985). The health effects associated with exposure to VOCs include eye and upper airway irritation, asthma and allergic respiratory symptoms, headaches, dizziness, and nausea, memory impairment, damage to the liver, kidney and central nervous system, and for certain VOCs, cancer (Indoor Air Quality Scientific Findings Resource Bank, <https://iaqscience.lbl.gov/voc-sensory>). The charcoal bed filter bank in the HVAC system at HTMS is designed to remove broad classes of VOCs from outdoor air. There are hundreds of organic compounds, therefore a reduced set of VOCs with relevance to TRAP or high toxic potential were selected for monitoring by the PSU team, and were monitored in the outdoor air, and the supply and return air streams of the HVAC system.

Currently, no federal standards have been set for VOCs, although guidelines and recommendations have been set by various professional organizations (ACGIH, <https://www.acgih.org/tlv-bei-guidelines/tlv-chemical-substances-introduction>). The evidence for toxicity for VOCs that are commonly present in TRAP has been reviewed by the Air Toxics Science Advisory Committee (ATSAC) of the Oregon DEQ, and this advisory body has recommended Ambient Benchmark Concentrations (ABCs) for specific chemical compounds that were adopted by the Environmental Quality Commission of the State of Oregon in 2017 (<https://www.oregon.gov/deq/aaq/air-toxics/Pages/default.aspx>). The ABCs are reviewed every 5 years and are based on the best available scientific evidence to derive an excess health effects risk (cancer, birth defect, organ damage) of 1-in-1 million from continuous inhalation exposure across a lifetime. This is the additional or extra risk of developing cancer due to exposure over the 70-year life of an individual. The ABCs include uncertainty factors to protect sensitive subgroups. Thus, the ABCs are health-based and provide a useful point of reference for evaluating population health risks, but it is incorrect to apply the ABCs to estimate the probability that an individual will experience an adverse health effect.

3.6.2 HTMS Outdoor and Indoor Levels

Levels of VOCs in the Spring monitoring period represent the typical occupancy conditions of the school without the influence of construction activities and off-gassing of new building materials. Outdoor air measurements of these VOCs at HTMS were less than concentrations reported by DEQ for Portland neighborhood monitoring stations (Figures 9-11). Using measurements of VOCs in the return air to represent the indoor exposure of students in classrooms, each of these VOCs were well below Ambient Benchmark Concentrations.

| Chemical | Portland Background µg/m ³ | Oregon DEQ ABC µg/m ³ | Outdoor Air µg/m ³ | Return Air µg/m ³ |
|---------------|--|-------------------------------------|----------------------------------|---------------------------------|
| Benzene | 0.59 | 0.13 | 0.10 | 0.00 |
| Toluene | 1.12 | 5000 | 0.41 | 0.18 |
| m-, p-Xylene | 1.28* | 200* | 0.31 | 0.10 |
| o-Xylene | 1.28* | 200* | 0.11 | 0.04 |
| Ethyl-benzene | 0.3 | 0.4 | 0.08 | 0.01 |

*mixed xylenes

3.6.3 Implications for Health

Indoor concentrations of VOCs were below the Oregon DEQ Ambient Benchmark Concentrations, indicating substantial protection while students and staff are indoors. Because students and staff are in this filtered air environment for the majority of their school day hours, their total daily exposure to VOCs is likely reduced relative to the total exposures they would receive when spending their day at their residence.

The potential for outdoor exposure to benzene during lunch and physical education activities exists. However, short-term exposures to benzene are not known to be associated with adverse health effects. Oregon DEQ monitoring indicates that outdoor levels of benzene are elevated across the Portland metro area and generally exceed the ABC. Human activities that emit benzene are common include evaporation from gasoline fuels at service stations and from vehicles, vehicle exhaust, and industrial processes. Control of benzene from these anthropogenic sources has been a focus of the Portland Air Toxics Solutions program (PATS). Additionally, natural sources of benzene in outdoor air include wildfires, which have impacted Portland urban air quality in recent years. The principal health concern for benzene is damage to the bone marrow and blood-forming tissues, and acute myeloid leukemia, resulting from long-term (lifetime) exposure.

4. Conclusions

- For each of the pollutants monitored, the filtered air delivered to the classrooms and interior spaces of the school is clean, safe and supportive of health for students and staff.
- Particle and gas removal by the HVAC system and its filtration systems remained consistently high across the school year.
- Outdoor levels of CO, NO₂, PM₁₀, and PM_{2.5} were below federal air quality standards.
- Outdoor levels of pollutants associated with diesel exhaust (black carbon and ultrafine particles) were observed at elevated levels typical of locations near heavily travelled highways.
- Outdoor levels of traffic-related air pollutants are consistently elevated in the early morning hours, but drop substantially by the first lunch period at 11:15 AM.

5. Recommendations

- To provide a margin of safety for students and staff who may have asthma, or be sensitive to traffic-related air pollution, outdoor physical education activities should be scheduled in the later morning and afternoon hours to avoid the highest daily outdoor levels.
- To ensure the continued high and effective performance of the HVAC system, continued monitoring of outdoor, supply and return air should continue at 3-month intervals until the operating characteristics of this unique system is confidently understood. In addition to providing assurance of health protection, this data will allow definition of a schedule of filter replacement that minimizes cost and waste.

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Figure 1. Plots of the median concentrations of carbon monoxide across the 9 AM – 4 PM school day. The height of the solid bars represents the median concentration. The ends of the whiskers represent the 25th and 75th percentiles. Concentration is expressed in parts per billion (ppb). The NAAQS is 9000 ppb averaged for 8 hours.

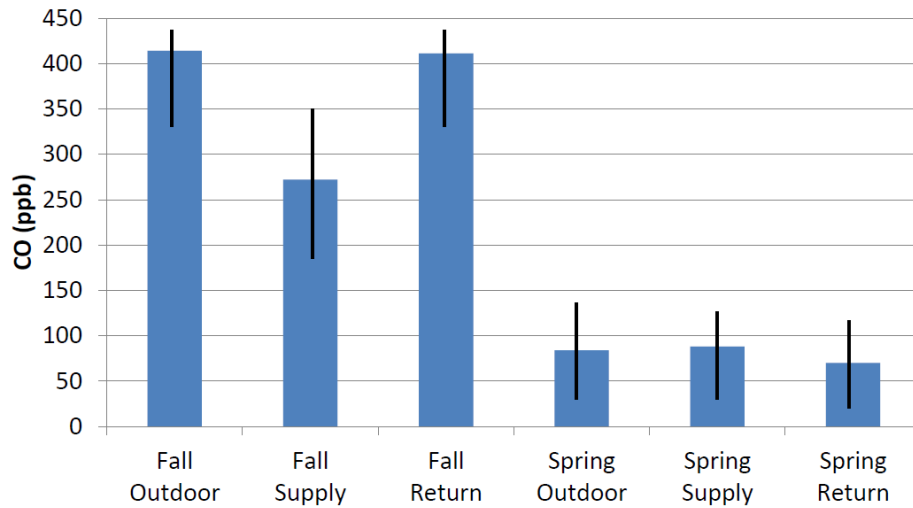


Figure 2. Plots of the median concentrations of nitrogen dioxide across the 9 AM – 4 PM school day. The height of the solid bars represents the median concentration. The ends of the whiskers represent the 25th and 75th percentiles. Concentration is expressed in parts per billion (ppb). The NAAQS is 100 ppb averaged for 1 hour.

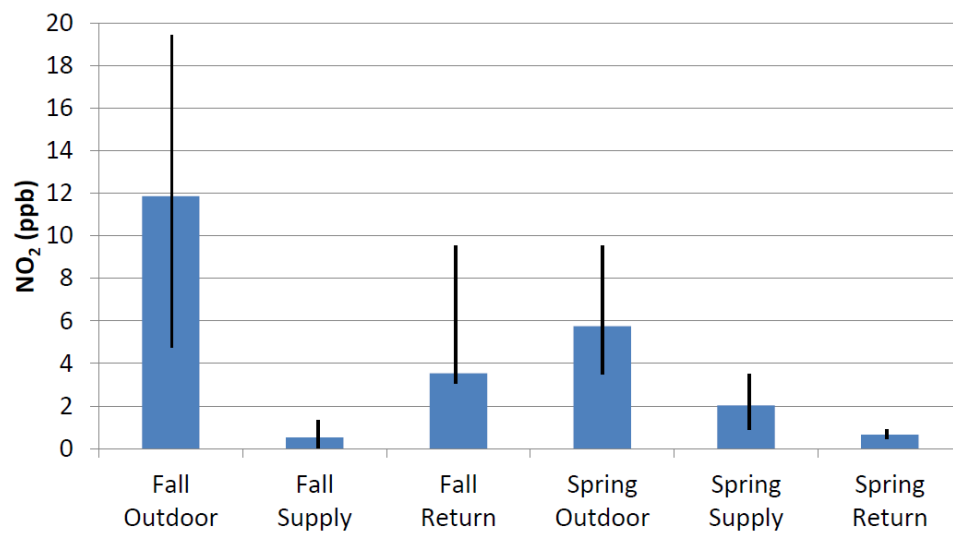


Figure 3. Plots of the median concentrations of PM₁₀ across the 9 AM – 4 PM school day. The height of the solid bars represents the median concentration. The ends of the whiskers represent the 25th and 75th percentiles. Concentration is expressed in micrograms per cubic meter (µg/m³). The NAAQS is 150 µg/m³ averaged over 24 hours.

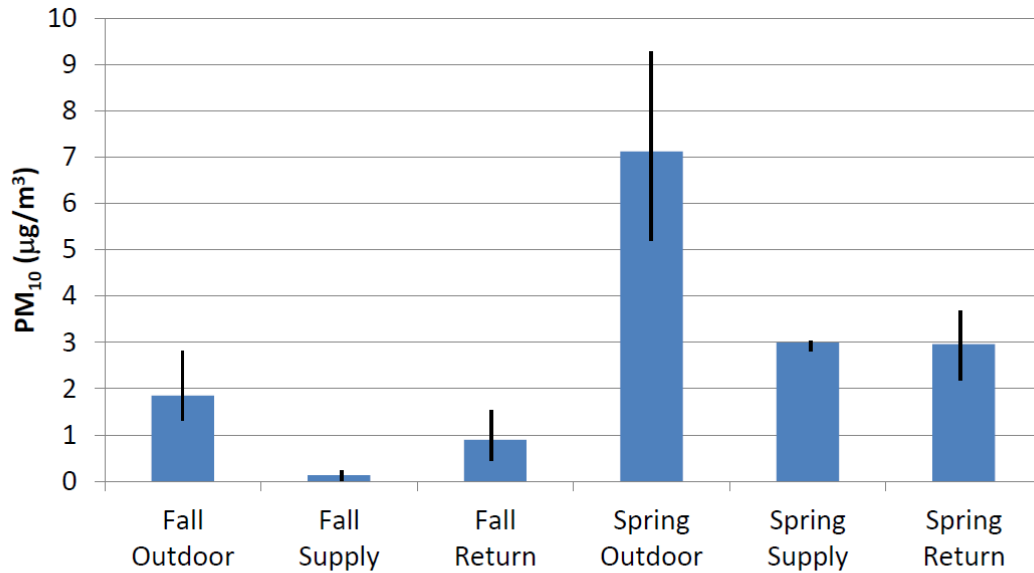


Figure 4. Plots of the median concentrations of PM_{2.5} across the 9 AM – 4 PM school day. The height of the solid bars represents the median concentration. The ends of the whiskers represent the 25th and 75th percentiles. Concentration is expressed in micrograms per cubic meter (µg/m³). The NAAQS for PM_{2.5} are 35 µg/m³ 24-hour average and 12 µg/m³ annual average.

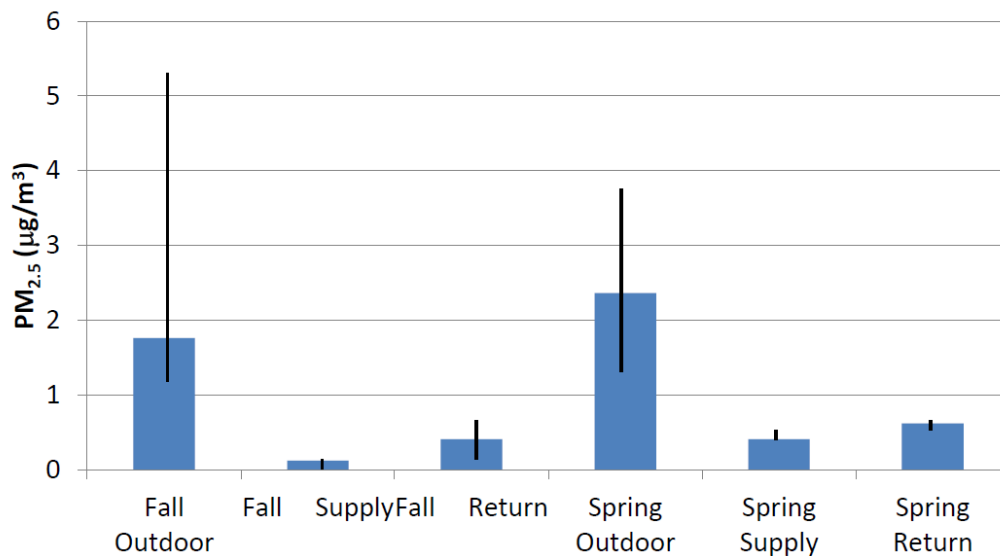


Figure 5. Plots of the median concentrations of Black Carbon across the 9 AM – 4 PM school day. The height of the solid bars represents the median concentration. The ends of the whiskers represent the 25th and 75th percentiles. Concentration is expressed in nanograms per cubic meter (ng/m^3). There is no federal standard for BC.

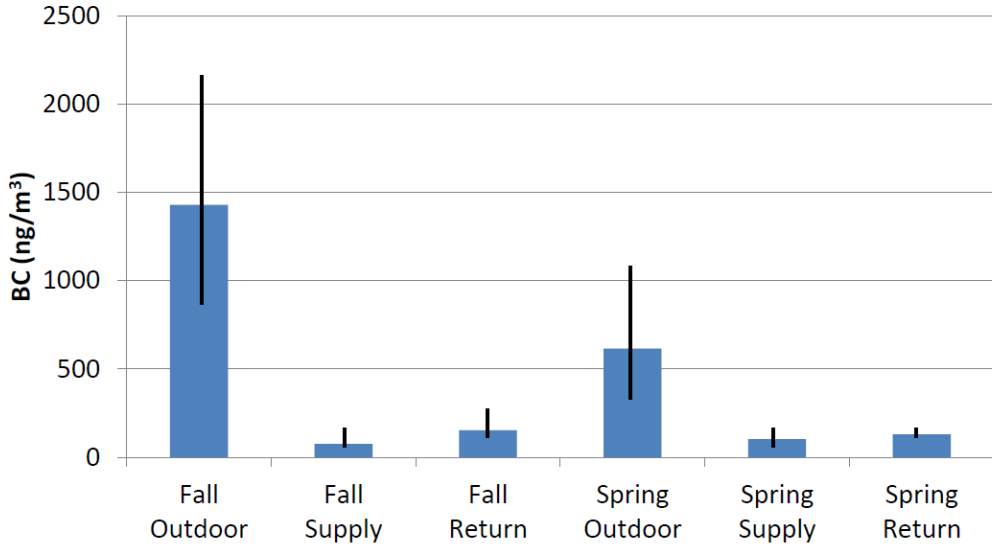


Figure 6. Plots of the distribution of one-hour average concentrations of Black Carbon measured at three Oregon DEQ monitoring sites (Portland N Roseland 2010-16, Portland SELafayette 2010, and Tualatin I-5 Bradbury Court 2014-16). The height of the solid bars represents the median concentration. The ends of the whiskers represent the 25th and 75th percentiles. Concentration is expressed in nanograms per cubic meter (ng/m^3).

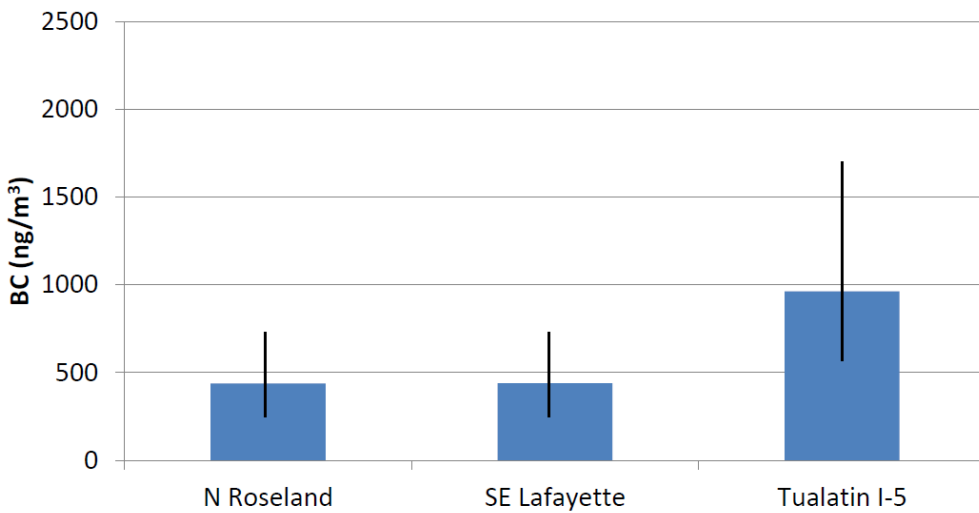


Figure 7. Plots of the median concentrations of Ultrafine Particles across the 9 AM – 4 PM school day. The height of the solid bars represents the median concentration. The ends of the whiskers represent the 25th and 75th percentiles. Concentration is expressed in counts per cubic centimeter (particles/cm³).

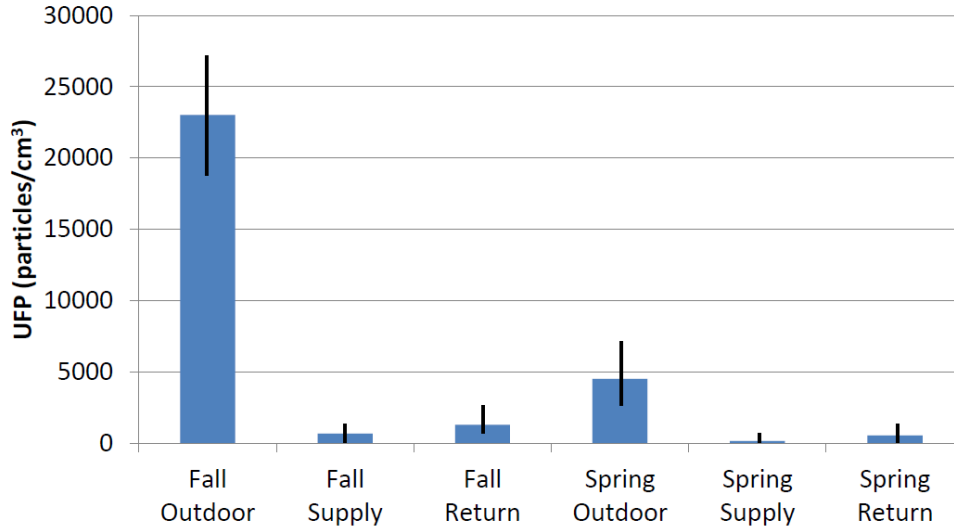


Figure 8. Plots of the median concentrations of Ultrafine Particles in outdoor areas surrounding HTMS in Spring 2019. The height of the solid bars represents the median concentration. The ends of the whiskers represent the 25th and 75th percentiles. Concentration is expressed in counts per cubic centimeter (particles/cm³).

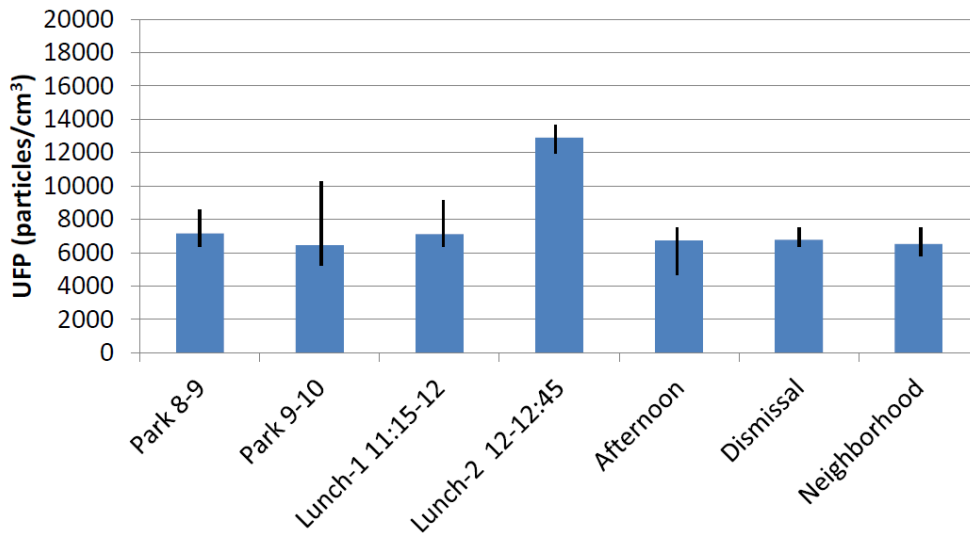


Figure 9. Plots of the median concentrations of the VOCs benzene and toluene in outdoor, supply, and return air locations of the HVAC system during Spring 2019. The height of the solid bars represents the median concentration. The ends of the whiskers represent the 25th and 75th percentiles. Concentration is expressed in micrograms per cubic meter ($\mu\text{g}/\text{m}^3$).

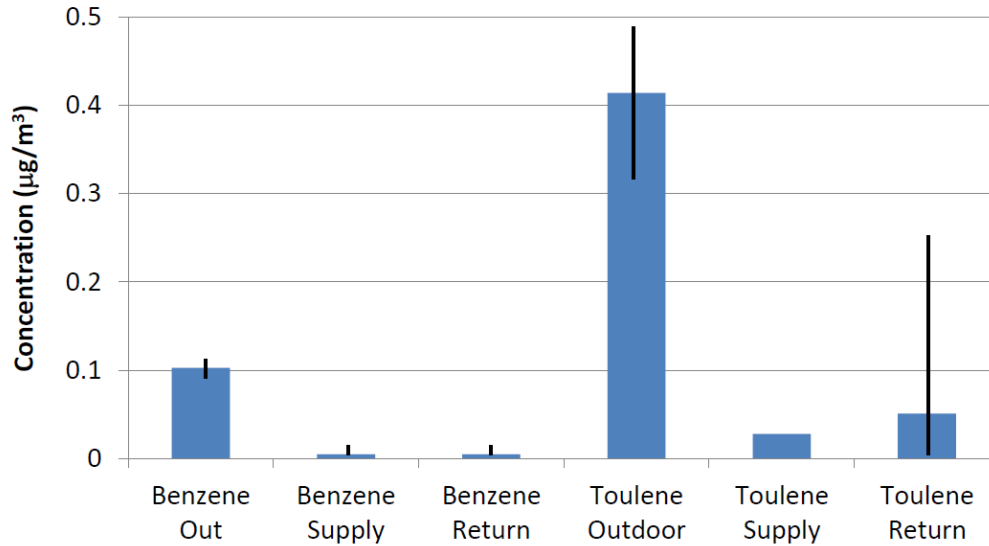


Figure 10. Plots of the median concentrations of the VOCs m-, p-Xylene and o-Xylene in outdoor, supply, and return air locations of the HVAC system during Spring 2019. The height of the solid bars represents the median concentration. The ends of the whiskers represent the 25th and 75th percentiles. Concentration is expressed in micrograms per cubic meter ($\mu\text{g}/\text{m}^3$).

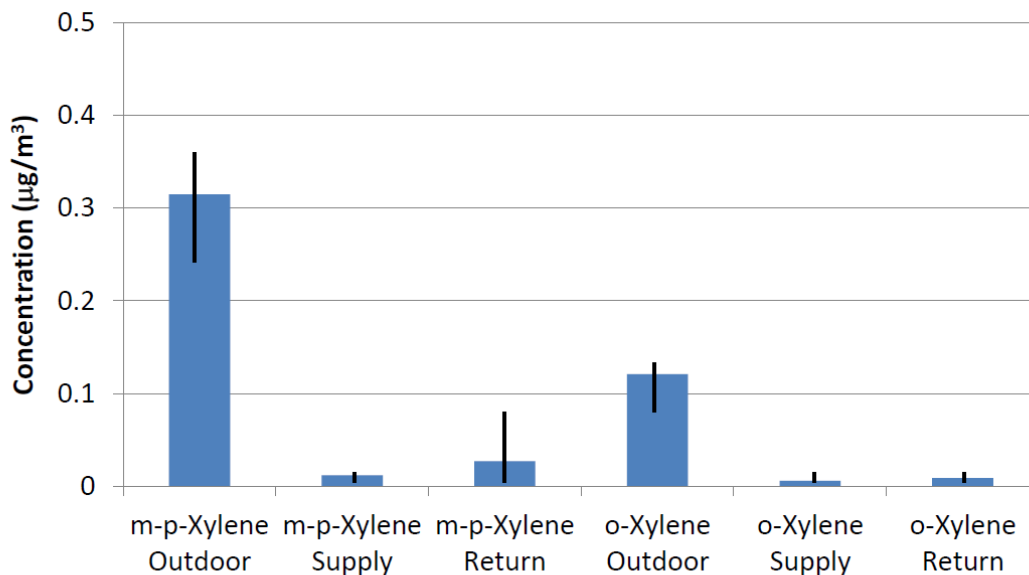
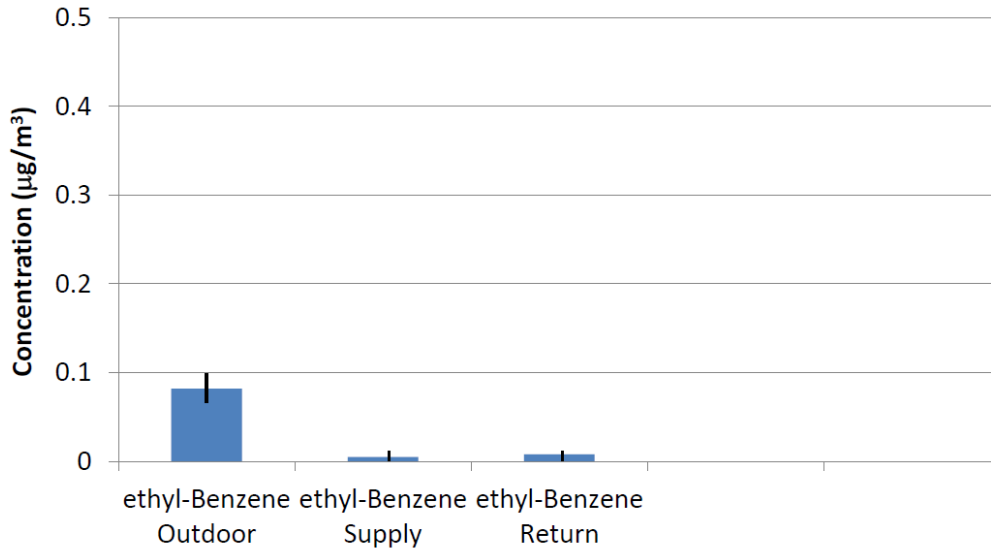


Figure 11. Plots of the median concentrations of the VOC ethylbenzene in outdoor, supply, and return air locations of the HVAC system during Spring 2019. The height of the solid bars represents the median concentration. The ends of the whiskers represent the 25th and 75th percentiles. Concentration is expressed in micrograms per cubic meter ($\mu\text{g}/\text{m}^3$).



March 19, 2019

Other Matters Requiring Board Approval

Resolution Numbers 5856 through 5861

During the Committee of the Whole, Director Kohnstamm moved and Director Anthony seconded the motion to adopt amended Resolution 5856. The motion was put to a voice vote and passed unanimously (6-yes, 0-no), with Director Kohnstamm absent and Student Representative Paesler voting yes, unofficial.

Director Anthony moved and Director Bailey seconded the motion to amend Resolution 5856 by adding the following language to Recital G: "...lack of school bus egress from Harriet Tubman Middle School with the removal of the Flint Street overpass,". The motion was put to a voice vote and passed unanimously (7-yes, 0-no), with Student Representative Paesler voting yes, unofficial.

Director Kohnstamm moved and Director Anthony seconded the motion to amend Resolution 5856 by revising the language of Recital 3 as follows: "The Board agrees to busmit comments to ODOT during the Environmental Assessment public comment period."

During the Committee of the Whole, Director Anthony moved and Director Brim-Edwards seconded the motion to adopt Resolution 5857. The motion was put to a voice vote and passed unanimously (6-yes, 0-no), with Director Kohnstamm absent and Student Representative Paesler voting yes, unofficial.

Director Anthony moved and Director Bailey seconded the motion to amend Policy 6.50.010-P by replacing the word "avoid" with "mitigate" in the first sentence of paragraph I.5. The motion was put to a voice vote and failed (1-yes [Anthony], 5-no), with Director Kohnstamm absent and Student Representative Paesler voting no, unofficial.

Director Brim-Edwards moved and Director Anthony seconded the motion to amend Policy 6.50.010-P by adding the word "race" in the first sentence of paragraph I.5. The motion was put to a voice vote and passed unanimously (6-yes, 0-no), with Student Representative Paesler voting yes, unofficial.

Director Bailey moved and Director Brim-Edwards seconded the motion to amend Policy 6.50.010-P, paragraph I.3, to read as follows:

- 3) Schools and staff to submit field trip requests for review, and approval or denial, prior to any planned activities.
 - a. Principals shall have the authority to approve regular off-campus field trips, subject to Risk Management approval, occurring during the course of one school day.
 - b. All off-campus trips comprising more than one school day will be reviewed by Risk Management and approved by the supervising Area Assistant Superintendent.
 - c. Specific timelines, procedures, and requirements of this field trip approval process will be outlined in a related Administrative Directive.

During the Committee of the Whole, Director Kohnstamm moved and Director Anthony seconded the motion to adopt Resolutions 5859 through 5861 (Resolution 5858 withdrawn). The motion was put to a voice vote and passed unanimously (6-yes, 0-no), with Director Kohnstamm absent and Student Representative Paesler voting yes, unofficial.

March 19, 2019

RESOLUTION No. 5856

PPS Comments on the Environmental Assessment of the I-5 Broadway-Weidler Facility Plan

RECITALS

- A. In 2012, the Oregon Department of Transportation (ODOT) and the City of Portland Bureau of Planning and Sustainability and the Bureau of Transportation developed the I-5 Broadway-Weidler Facility Plan in conjunction with the City's N/NE Quadrant Plan. The N/NE Quadrant Plan set goals and actions for the land use and development in north and northeast Portland, while the Broadway-Weidler Facility Plan was intended to improve safety and operations on I-5 in the vicinity of the Broadway/Weidler interchange. Key elements of the facility plan include:
1. Adding auxiliary lanes and full-width shoulders (within existing right-of-way).
 2. Rebuilding structures at Broadway, Weidler, Vancouver and Williams and adding a lid over the freeway.
 3. Moving the I-5 southbound on-ramp to Weidler.
 4. Adding new connections over the freeway for pedestrian and bicycle travel in the interchange area.
- B. In 2012, the Portland City Council and the Oregon Transportation Commission approved the Broadway-Weidler Facility Plan. The proposed plan includes substantial widening of I-5 immediately adjacent to Harriet Tubman Middle School, including extending travel lanes closer to the school and constructing new retaining walls.
- C. In 2016, ODOT concluded the Broadway-Weidler Facility Plan improvements were technically feasible, and proceeded with development of an Environmental Assessment (EA). The EA is intended to evaluate the benefits and impacts within the Project Area of two alternatives: one in which the project would move forward as planned (Build Alternative), and one in which the project would not be built (No-Build Alternative).
- D. The National Environmental Policy Act (NEPA) requires federal agencies to assess the environmental effects of their proposed actions prior to making decisions. Based on the EA, the following actions can occur:
- a. If the agency determines that the action will not have significant environmental impacts, the agency will issue a Finding of No Significant Impact (FONSI). A FONSI is a document that presents the reasons why the agency has concluded that there are no significant environmental impacts projected to occur upon implementation of the action.
 - b. If the EA determines that the environmental impacts of a proposed action will be significant, an Environmental Impact Statement is prepared.
- E. ODOT's EA was published on February 15, 2019. The public comment period closes April 1, 2019. ODOT is required to take into consideration public health impacts in its analysis, and to use an equity lens in its planning processes. The historical legacy from ODOT ignoring health and equity concerns voiced decades ago about building a freeway to close to a school has cost PPS millions of dollars that were used to make the air inside Tubman safe for students.
- F. Although the proposed changes are immediately adjacent to PPS properties, in particular the Harriet Tubman Middle School, neither ODOT nor the City meaningfully engaged with PPS during the planning process to assess the potential impacts, either short-term or long-term, on the health

March 19, 2019

of students and staff from environmental hazards or on the structural integrity of PPS facilities from incursions on PPS property during construction.

- G. An initial review of the EA by PPS staff has raised substantial questions about potential impacts on PPS properties, including risks to soil stability under the Harriet Tubman Middle School site during the construction process, increased air pollution, increased noise pollution, lack of school bus egress from Harriet Tubman Middle School with the removal of the Flint Street overpass, and shifts to traffic patterns in the vicinity of both Tubman and District headquarters.
- H. The materials that have been made publicly available to date, including the environmental assessments published only six weeks ago, provide insufficient evidence that the full scope of potential impacts from these projects has been adequately assessed.

RESOLUTION

- 1. Due to the potential significant negative short-term and long-term impacts of the proposed project to PPS property, students, staff, and stakeholders, the Board of Education (Board) believes that ODOT cannot legitimately issue a Finding of No Significant Impact (FONSI). Additional study and input is necessary to understand the extent of the impacts and develop mitigation strategies.
- 2. Therefore, the Board finds that a full Environmental Impact Statement for the proposed project is warranted and necessary to determine the potential impacts of the proposed I-5 construction on PPS properties, PPS students and staff, and the larger community.
- 3. The Board agrees to submit comments to ODOT during the Environmental Assessment public comment period.

December 03, 2019

Consent Agenda

Resolution 6006 was tabled prior to the start of the meeting.

Resolution 6007 was tabled and will be brought back to the next meeting.

As a committee of the whole, Director Scott moved and Director Lowery seconded a motion to amend Resolution 6008 to replace the word “privately” under section K to “indicated that”. The motion was put to a voice vote and passed unanimously (7-yes, 0-no), with Student Representative Latterell voting yes.

As a committee of the whole, Director Scott moved and Director Brim-Edwards seconded a motion to adopt Resolution 6008. The motion was put to a voice vote and passed unanimously (7-yes, 0-no), with Student Representative Latterell voting yes.

Director Lowery moved and Director Scott seconded a motion to amend the final sentence of the second paragraph in Resolution 6009, under the Structure section, to read “One or two student members will be appointed to a one-year term through a process defined by the District Student Counsel.” The motion was put to a voice vote and passed unanimously (7-yes, 0-no), with Student Representative Latterell absent.

Director Lowery moved and Director Bailey seconded a motion to amend Resolution 6009 to add “Members are expected to attend committee meetings. Persistent lack of participation may result in the termination of a member’s Board appointment.” The motion was put to a voice vote and passed unanimously (7-yes, 0-no), with Student Representative Latterell absent.

Director DePass moved and Director Scott seconded a motion to adopt Resolution 6009. The motion was put to a voice vote and passed unanimously (7-yes, 0-no), with Student Representative Latterell absent.

December 03, 2019

RESOLUTION No. 6008

PPS Comments on Status of Oregon Department of Transportation's "I-5 Rose Quarter Improvement Project"

RECITALS

- A. In 2012, the Oregon Department of Transportation (ODOT) and the City of Portland Bureau of Planning and Sustainability and the Bureau of Transportation developed the I-5 Broadway-Weidler Facility Plan in conjunction with the City's N/NE Quadrant Plan. The N/NE Quadrant Plan set goals and actions for the land use and development in north and northeast Portland, while the Broadway-Weidler Facility Plan was intended to improve safety and operations on I-5 in the vicinity of the Broadway/Weidler interchange. Key elements of the facility plan include:
- a. Adding auxiliary lanes and full-width shoulders (within existing right-of-way).
 - b. Rebuilding structures at Broadway, Weidler, Vancouver and Williams and adding a lid over the freeway.
 3. Moving the I-5 southbound on-ramp to Weidler.
 4. Adding new connections over the freeway for pedestrian and bicycle travel in the interchange area.
- B. In 2012, the Portland City Council and the Oregon Transportation Commission approved the Broadway-Weidler Facility Plan. The proposed plan includes substantial widening of I-5 immediately adjacent to Harriet Tubman Middle School, including extending travel lanes closer to the school and constructing new retaining walls.
- C. In 2016, ODOT concluded the Broadway-Weidler Facility Plan improvements were technically feasible, and proceeded with development of an Environmental Assessment (EA). The EA is intended to evaluate the benefits and impacts within the Project Area of two alternatives: one in which the project would move forward as planned (Build Alternative), and one in which the project would not be built (No-Build Alternative).
- D. The National Environmental Policy Act (NEPA) requires federal agencies to assess the environmental effects of their proposed actions prior to making decisions. Based on the EA, the following actions can occur:
- a. If the agency determines that the action will not have significant environmental impacts, the agency will issue a Finding of No Significant Impact (FONSI). A FONSI is a document that presents the reasons why the agency has concluded that there are no significant environmental impacts projected to occur upon implementation of the action.
 - b. If the EA determines that the environmental impacts of a proposed action will be significant, an Environmental Impact Statement is prepared.
- E. ODOT's EA was published on February 15, 2019. The public comment period closed April 1, 2019. ODOT is required to take into consideration public health impacts in its analysis, and to use an equity lens in its planning processes. The historical legacy from ODOT ignoring health and equity concerns voiced decades ago about building a freeway too close to a school has cost PPS millions of dollars that were used to make the air inside Tubman safe for students and had health and environment consequences for our students and the surrounding community..

December 03, 2019

- F. Although the proposed project is immediately adjacent to PPS properties, in particular Harriet Tubman Middle School, neither ODOT nor the City meaningfully engaged with PPS during the planning process to assess the potential impacts, either short- or long-term, on the health of students and staff from environmental hazards of the freeway and the expansion or on the structural integrity of PPS facilities from incursions on PPS property during construction.
- G. An initial review of the EA by PPS staff raised substantial questions about potential impacts on PPS properties, including risks to soil stability under the Harriet Tubman Middle School site during the construction process, increased air pollution, increased noise pollution, lack of school bus egress from Harriet Tubman Middle School with the removal of the Flint Street overpass, and shifts to traffic patterns in the vicinity of both Tubman and District headquarters.
- H. In March 2019, the PPS Board of Education passed a resolution urging ODOT to move forward with a full Environment Impact Statement (EIS) to fully resolve questions around the potential impacts of the I-5 freeway and the proposed expansion on our students.
- I. In June 2019, ODOT convened a group of elected leaders and staff as well as community stakeholders to discuss the I-5 Rose Quarter Improvement Project in the Albina neighborhood.
- J. To date, this group has met five times and made no substantial progress to substantially address issues raised by Portland Public Schools and the Albina Vision or offer alternatives to the current project plan.
- K. At this time, the OTC has indicated that it plans to unilaterally take action at its December 17 public meeting without addressing any of the troubling and significant impacts that the widening will have on students and community health.
- L. Per Board Resolution 5272, the Board is committed to addressing issues of climate justice that affect our students.

RESOLUTION

- The Board of Education for Portland Public Schools opposes ODOT's efforts to move ahead with the Interstate 5 North of the Rose Quarter expansion in Albina without conducting a full Environmental Impact Statement (EIS) and addressing the long term health and environmental issues at Harriet Tubman Middle School caused by the I-5 freeway.
- The Board of Education for Portland Public Schools will work in partnership with Albina Vision Trust to understand the environmental and health impacts of the freeway for students in the Albina neighborhood and develop initiatives that mitigate the freeway's impact on students and their families in this neighborhood.
- The Board will work with the community to share information about the impacts of this freeway and the expansion with the legislature's Joint Committee on Transportation and other legislative leaders so that they understand the potential impacts of this project to Portland Public Schools' students and the wider Albina community.

RESOLUTION No. 6354

Protecting PPS Students, Staff, and Communities in Oregon Department of Transportation's I-5 Rose Quarter Project

RECITALS

- A. In 2012, the Oregon Department of Transportation (ODOT) and the City of Portland Bureau of Planning and Sustainability and the Bureau of Transportation developed the I-5 Broadway-Weidler Facility Plan in conjunction with the City's N/NE Quadrant Plan. The N/NE Quadrant Plan set goals and actions for the land use and development in north and northeast Portland, while the Broadway-Weidler Facility Plan was intended to improve safety and operations on I-5 in the vicinity of the Broadway/Weidler interchange. Key elements of the facility plan include:
 - a. Adding auxiliary lanes and full-width shoulders (within existing right-of-way).
 - b. Rebuilding structures at Broadway, Weidler, Vancouver and Williams and adding a lid over the freeway.
 - c. Moving the I-5 southbound on-ramp to Weidler.
 - d. Adding new connections over the freeway for pedestrian and bicycle travel in the interchange area.
- B. In 2012, the Portland City Council and the Oregon Transportation Commission approved the Broadway-Weidler Facility Plan. The proposed plan includes substantial widening of I-5 immediately adjacent to Harriet Tubman Middle School, including extending travel lanes closer to the school and constructing new retaining walls.
- C. In 2016, ODOT concluded the Broadway-Weidler Facility Plan improvements were technically feasible and proceeded with development of an Environmental Assessment (EA). The EA is intended to evaluate the benefits and impacts within the project area of two alternatives: one in which the project would move forward as planned (Build Alternative), and one in which the project would not be built (No-Build Alternative).
- D. The National Environmental Policy Act (NEPA) requires federal agencies to assess the environmental effects of their proposed actions prior to making decisions. Based on the EA, the following actions can occur:
 - a. If the agency determines that the action will not have significant environmental impacts, the agency will issue a Finding of No Significant Impact (FONSI). A FONSI is a document that presents the reasons why the agency has concluded that there are no significant environmental impacts projected to occur upon implementation of the action.
 - b. If the EA determines that the environmental impacts of a proposed action will be significant, an Environmental Impact Statement is prepared.
- E. ODOT's EA was published on February 15, 2019. The public comment period closed April 1, 2019. ODOT is required to take into consideration public health impacts in its analysis and to use an equity lens in its planning processes. The historical legacy from ODOT ignoring health and equity concerns voiced decades ago about building a freeway too close to a school has had health and environment consequences for our students and the surrounding community and required PPS to spend millions in limited capital funds to make the air inside Tubman safe for students.
- F. Although the proposed project is immediately adjacent to PPS properties, in particular Harriet Tubman Middle School, neither ODOT nor the City meaningfully engaged with PPS or our families during the planning process to assess the potential impacts, either short- or long-term, on the health of students and staff from environmental hazards of the freeway and the expansion or

on the structural integrity of PPS facilities from incursions on PPS property during construction.

- G. I-5 is already built hazardously close to Harriet Tubman Middle School (HTMS) and has negative impacts on the air quality for students and staff. PPS spent more than \$10M to install air filtration systems when the school reopened in 2018 to mitigate the impacts of traffic on I-5.
- H. An initial review of the EA by PPS staff raised substantial questions about potential impacts on PPS properties, including risks to soil stability under the Harriet Tubman Middle School site during the construction process, increased air pollution, increased noise pollution, lack of school bus egress from Harriet Tubman Middle School with the removal of the Flint Street overpass, and shifts to traffic patterns in the vicinity of both Tubman and District headquarters.
- I. In March 2019 and again in December 2019, the PPS Board of Education passed resolutions 5856 and 6008 urging ODOT to move forward with a full Environmental Impact Statement (EIS) to fully resolve questions around the potential impacts of the I-5 freeway and the proposed expansion on our students.
- J. Representatives of Portland Public Schools and the Board of Education have continued raising concerns about potential air-quality impacts to Harriet Tubman Middle School students and the surrounding neighborhood and to support economic empowerment in the Albina neighborhood by investing in highway covers to enable redevelopment and reinvestment and improve neighborhood connectivity.
- K. To date, none of the concerns raised by Portland Public Schools has been addressed by ODOT; and in fact, at an Executive Steering Committee meeting in fall 2020, ODOT representatives opposed language that would require the project to result in air quality at Harriet Tubman Middle School that is safe for youth.
- L. In late spring 2021, Portland Public Schools conducted community outreach to Harriet Tubman Middle School families, as well as its feeder schools: Boise-Eliot, Irvington, Sabin and Dr. Martin Luther King Jr.
- M. An online survey was open from June 3-June 21, 2021, and the District also conducted a focus group. In general, the feedback from the community can be summarized under three themes: air quality for students, broader engagement, and relocation of HTMS. Given COVID-19 gathering restrictions and summer schedules, community engagement will be ongoing.
- N. The feedback regarding air quality included requests for improved indoor ventilation systems, identification of long-term impacts on students, and installation of highway covers.
- O. State and regional leaders have shared their concern for the negative impact the original freeway placement has had and that the freeway expansion will have on HTMS students and the community.
- P. On June 11, 2020, the PPS Board of Education unanimously approved Resolution 6130. In this resolution, the Board declared that the lives of Black students and our Black community matter and committed to working with the Superintendent and the Portland community to create the conditions for every student, especially our Black and Native students who experience the greatest challenges, to realize the vision of the Graduate Portrait.
- Q. The work of the Albina Vision Trust and the Black community in Portland to reclaim the Albina community is similar to the push for equitable access to public education, especially for our Black students and their families. This push has long been a key component of the civil rights movement and fight for racial justice and builds on the legacy of advocacy for Black children in Portland, and catalyzed by the social movements for Black Lives. Government Institutions like ODOT and PPS, have a moment, an opportunity to lead, not with race-neutral plans, but with an

anti-racist agenda that amplifies an intergenerational healing process among students, their families, and our community.

- R. Portland Public Schools appreciates that the State and other partners are working with PPS to find a solution to address the ongoing concerns about the air quality and construction disruption at Harriet Tubman Middle School.

RESOLUTION

- A. The Board of Education for Portland Public Schools will work in partnership with Albina Vision Trust, state and community leaders to understand the environmental and health impacts of the freeway for students in the Albina neighborhood and advocate for initiatives that mitigate the freeway's impact on students and their families in this neighborhood.
- B. The Board of Education for Portland Public Schools supports and urges federal investments to reconnect, revitalize and transform the Albina community to address the many harms caused by the original construction of the Interstate freeway and ensure a seamless, aligned project that addresses displacement, economic, and environmental racism, while supporting educational innovation and new economic opportunities for the community.
- C. If ODOT and the State proceed with the project that will compound the original negative health and environmental impacts on the students and neighboring community, the Board of Education and Superintendent for Portland Public Schools calls on state leaders and the project team to accept the responsibility for the harm they have caused and to mitigate the past and potential future harm to the health of students and staff at Harriet Tubman Middle School.
- D. Further, Portland Public Schools leadership demands that if the State moves ahead with the project that it commits to create a transformative infrastructure project for Historic Albina and to secure the funds to rebuild Harriet Tubman Middle School in a safe, healthy location in Historic Albina.



Harriet Tubman Middle School Relocation: Overview

June 15, 2022





Agenda

- Overview
- Due Diligence Vol. 3 Summary
- Community Engagement Summary
- Committee Feedback



Efforts to Date

COMMUNITY ENGAGEMENT

| | |
|--------------|---|
| Dec | Initial property search (location, acreage, timing) |
| Jan | Expanded options (PPS sites, outside catchment) |
| Feb | Due Diligence Vol. 1 |
| Mar | Due Diligence Vol. 2 |
| April | Cont. Site analyses |
| May | Cont. Site analyses |
| June | Due Diligence Vol. 3 |

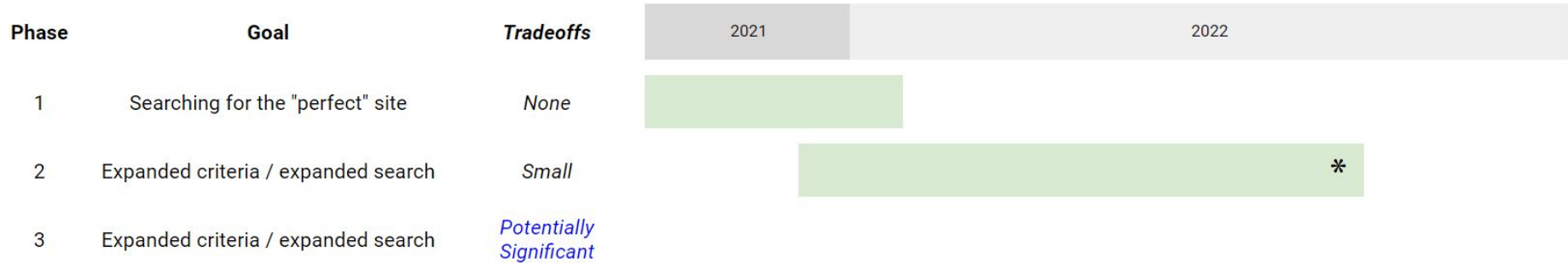


Schedule

| sample schedule | May | June | July | Aug | Sept | Oct | Nov |
|---------------------------------------|-----|------|------|-----|------|-----|-----|
| F&O Meeting | █ | | | | | | |
| Due Diligence - Vol. 3 | | █ | | | | | |
| Engagement Plan | | █ | | | | | |
| Stakeholder Meeting | | █ | | | | | |
| F&O Meeting | | █ | | | | | |
| Due Diligence - Vol. 4 | | | | █ | | | |
| Stakeholder Meeting | | | | █ | | | |
| F&O Meeting | | | | █ | | | |
| Due Diligence - Vol. 5 | | | | | █ | | |
| Stakeholder Meeting | | | | | █ | | |
| F&O Meeting | | | | | █ | | |
| Due Diligence - Vol. 6 | | | | | | █ | |
| Stakeholder Meeting | | | | | | █ | |
| F&O Meeting | | | | | | █ | |
| BOE Approval | | | | | | | █ |
| Engagement: Students / Families / Etc | █ | | | | | | |



Site Search





Grounding Statements

- The Tubman relocation process will not displace an existing K5 school
- Tubman will not be combined with an elementary school and converted to a K8
- The Tubman relocation process will not alter existing feeder school patterns
- The Tubman relocation process will not alter JHS' program or enrollment
- Tubman will continue to be a comprehensive middle school
- *The new Tubman will not be located outside the current Tubman boundary*



Due Diligence Vol. 3

- BESC
- Lloyd Center
- Meek Prof Tech School
- Jefferson HS (South Lot)
- Humboldt Site
- Emanuel



BESC

Benefits

- Located within existing Tubman boundary
- Owned by PPS

Risks

- A prerequisite of development is successful relocation of existing site functions
- Potentially cost prohibitive

Recommendation

- Continue analysis



Concept Layout



Lloyd Center

Benefits

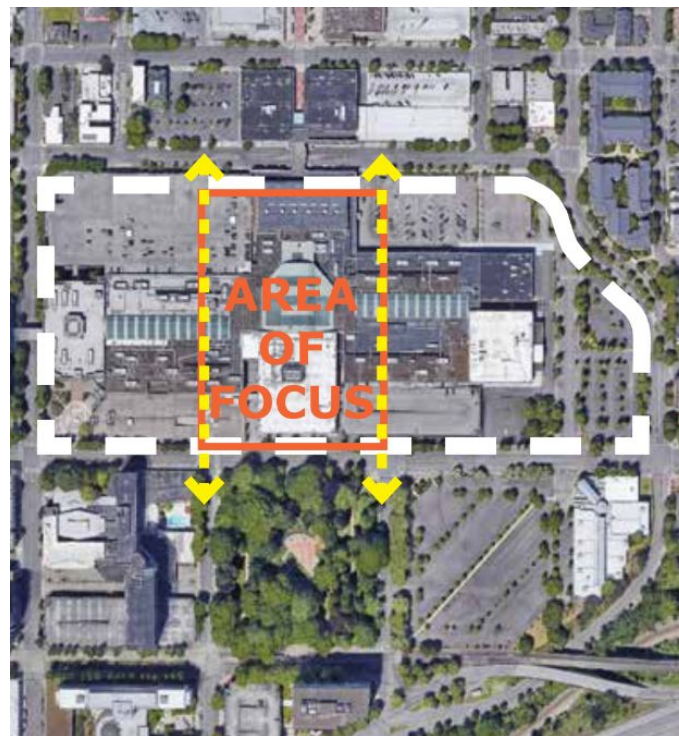
- The property is for sale

Risks

- Requires successful real estate negotiations
- Located in a dense commercial neighborhood
- Cost prohibitive

Recommendation

- Consider site nonviable. No further analysis at this time.



Concept Layout



Meek Prof Tech School

Benefits

- Owned by PPS
- Smaller, but adequately sized for a middle school
- Least cost option

Risks

- Located outside the Tubman boundary

Recommendation

- Consider site nonviable. No further analysis at this time.



Concept Layout



Jefferson HS (south lot)

Benefits

- Located within existing Tubman boundary
- Owned by PPS

Risks

- Too small to accommodate a comprehensive middle school
- Unavailable for development until 2026
- Impacts to Jefferson HS

Recommendation

- Consider site nonviable. No further analysis at this time.



Concept Layout



Humboldt Site

Benefits

- Located within existing Tubman boundary
- Owned by PPS

Risks

- Unavailable for development
- Impacts to Jefferson HS

Recommendation

- Consider site nonviable. No further analysis at this time.



HUMBOLDT PLAN DIAGRAM

Concept Layout



Emanuel

Benefits

- Located within existing Tubman boundary

Risks

- Unavailable for development
- Design and safety concerns

Recommendation

- Consider site nonviable. No further analysis at this time.



Concept Layout



| Due Diligence Vol. 3 | Criteria | | | | | Cost |
|--|-------------------------|----------|------------------|---------------------|----------------------------|------|
| | Community Consideration | Location | Site Suitability | Availability (Time) | Operational Sustainability | |
| Under Consideration | | | | | | |
| BESC | | + | ○ | - | ○ | - |
| Lloyd Center | | ○ | - | ○ | - | - |
| Meek Prof Tech School | | - | + | + | + | + |
| Jefferson High School (South Lot) | | + | - | - | + | + |
| Humboldt | | + | ○ | - | + | + |
| Emanuel | | + | - | - | - | - |
| Previously reviewed. Not considered viable. Not under current consideration | | | | | | |
| 432 NE Killingsworth | | + | ○ | - | - | - |
| Boise Eliot Elem | | + | ○ | + | + | + |
| Concordia University Site | | - | + | - | - | - |
| Irvington Elem | | + | ○ | + | + | + |
| Jefferson High School (Main Lot) | | + | - | - | - | ○ |
| Kenton | | - | ○ | + | + | + |
| Martin Luther King Elem | | + | ○ | + | + | + |
| N Stanton | | + | - | ○ | - | ○ |
| NE Multnomah | | ○ | + | ○ | - | - |
| PBOT Yard | | + | - | ○ | - | ○ |
| PP&R (ALBERTA, DAWSON, IRVING) | | + | + | ○ | - | + |
| Sabin Elem | | + | ○ | + | + | + |
| Thunderbird Way | | + | - | - | - | ○ |
| Whitaker-Adams | | - | + | + | + | + |

KEY

- +** Positive Site Evaluation
- Negative Site Evaluation
- Neutral Site Evaluation

notes recommended continued analysis for Due Diligence Vol. 4

Illustrative summary of site assessments intended for discussion purposes



Proposed Design and Community Engagement in Alignment with CBSE

| Relationships & History | Healing, Humility & Needs Finding | Inspiration, Ideate, Prototype | Test (Staff Recommendation) |
|---|---|--|--|
| <p><u>June-July</u></p> <p>Organize our working relationship with CBE partners to participate at all levels of engagement</p> <p>Site Selection Committee</p> <p>Black Tubman Families Listening Session</p> <p>Tubman Listening Session</p> | <p><u>August</u> In-school design research/engagement</p> <p><u>August-September</u> Community engagement series</p> <p><u>Mid-Late September</u></p> <p>Guiding Coalition #1: Scenario Planning on Locations (Tubman specific topic)</p> <p>School Board Business and Operations Committee Update</p> | <p><u>September</u> In-school design research/engagement</p> <p><u>September-October</u> Community engagement series</p> <p><u>Mid-Late October</u></p> <p>Guiding Coalition #2: In-depth analysis and site evaluation (Tubman specific topic)</p> | <p><u>October-November</u> In-school design research/engagement</p> <p><u>November</u> Community engagement Series</p> <p>Guiding Coalition #3: Refine final site selection (Tubman specific topic)</p> <p><u>November</u> Board of Education votes on site selection of Harriet Tubman</p> <p>School Board Business and Operations Committee Update</p> |



Committee Feedback

notes recommended
continued analysis for Due
Diligence Vol. 4

DD Vol. 3 Sites

BESC

Meek Prof Tech School

Humboldt Site

Lloyd Center

Jefferson HS (South Lot)

Emanuel

Trade Offs to Consider

1. The Tubman relocation process will not displace an existing K5 school
2. Tubman will not be combined with an elementary school and converted to a K8
3. The Tubman relocation process will not alter existing feeder school patterns
4. The Tubman relocation process will not alter JHS' program or enrollment
5. Tubman will continue to be a comprehensive middle school (will not be an alternative or small school)
6. *The new Tubman will not be located outside the current Tubman boundary*



Next Steps

- Due Diligence Vol. 4
- Community Engagement
- F&O Committee: August



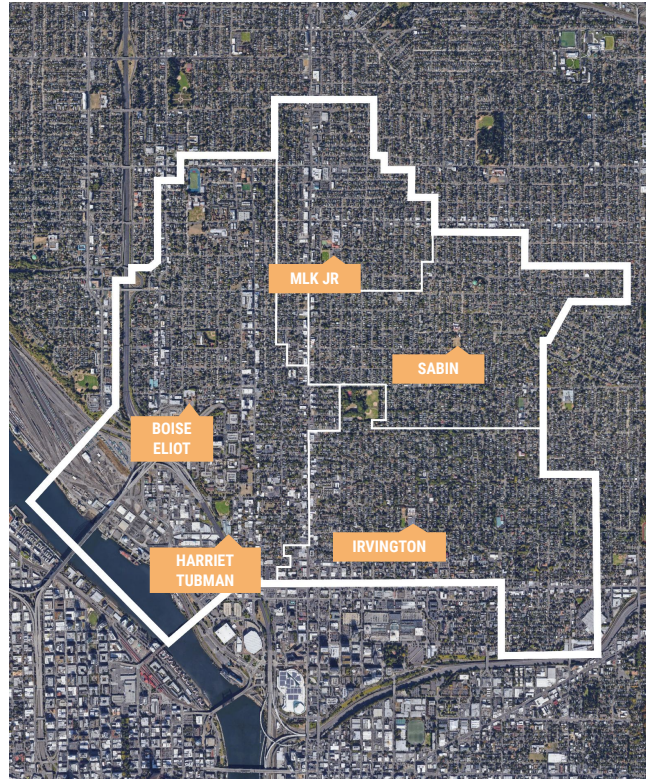
Questions?



Resources



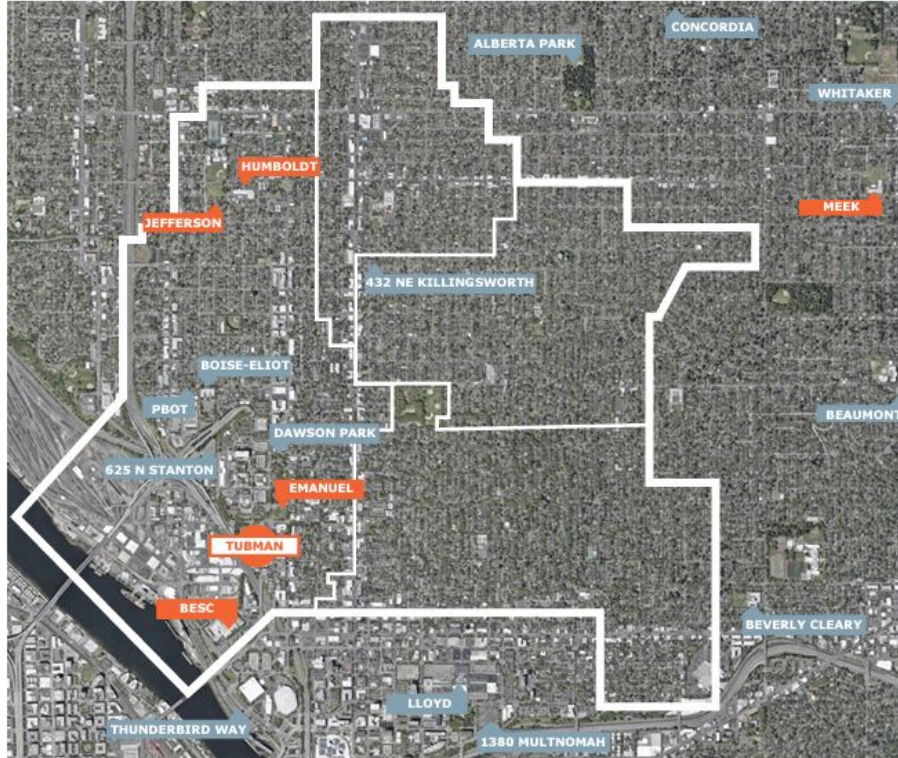
Tubman Feeder Schools





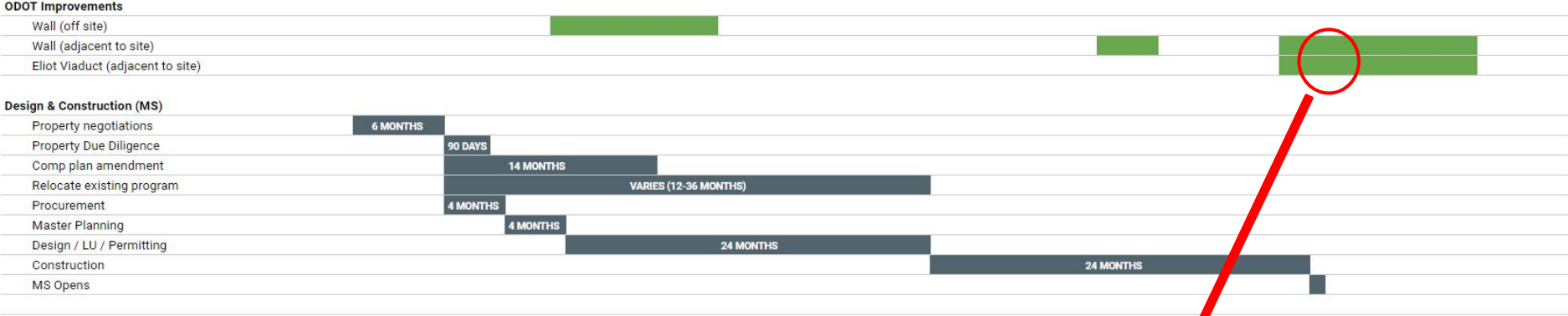
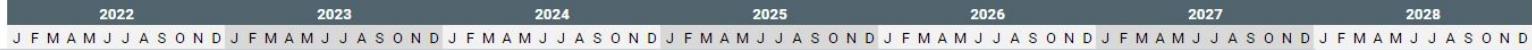
Considered Sites

KENTON

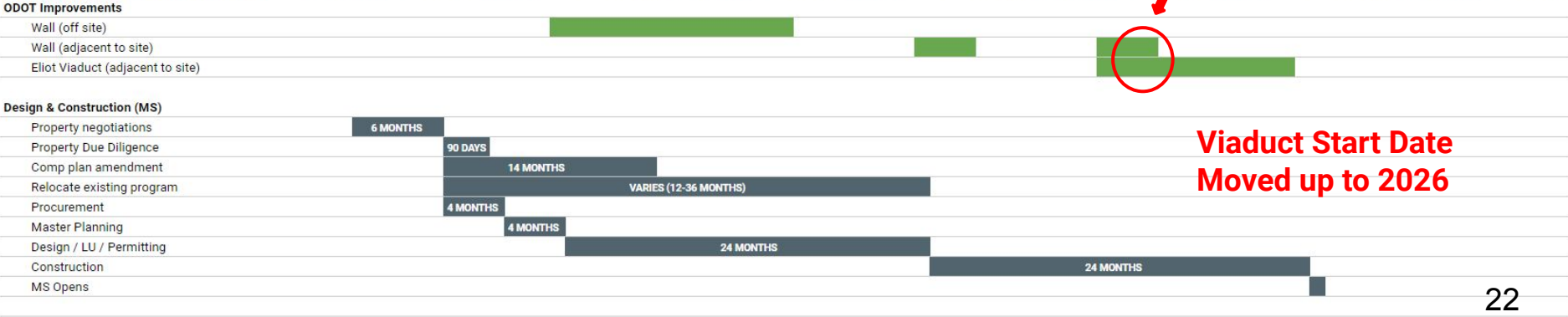
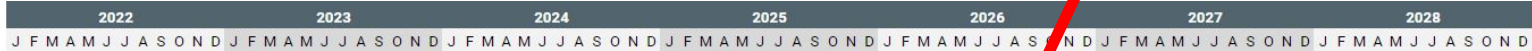




ORIGINAL CONSTRUCTION SCHEDULE



UPDATED CONSTRUCTION SCHEDULE



**Viaduct Start Date
Moved up to 2026**



PORTLAND PUBLIC SCHOOLS
OFFICE OF SCHOOL MODERNIZATION
501 North Dixon Street / Portland, OR 97227
Telephone: (503) 916-2222

Date: June 15, 2022
To: Facilities and Operations Committee
From: Marina Cresswell, Senior Director, Office of School Modernization
Subject: OSM Quarterly Report

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 May 25, 2022, meeting.

Project status updates for the 2017 Health & Safety, 2020 Capacity, and 2020 Infrastructure projects were provided at the May 25, 2022, meeting. The meeting agenda also included an overview of OSM project oversight.

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 \$2.76 billion. Roughly \$1.33 billion of that has been spent to date.

The 2012 Bond program continues to close out documentation and financials on completed projects. Most remaining funds are expected to go towards the completion of the Grant Upper Fields Improvement project, as the final significant project of the 2012 Bond. The Grant project is putting in finishing touches and expects to be complete this month, with the exception of scoreboards that will not be arriving until September due to pandemic-related supply chain issues.

The 2017 Bond program has spent roughly 76% of its current \$924 million budget (budget includes grants, interest earnings, premiums, and other non-Bond funds as part of the overall total). Teams continue to work on closing out the McDaniel HS and Kellogg MS modernization projects that opened to

students in Fall 2021. A baseball/softball field issue was identified at McDaniel HS after school start, and OSM is in process of confirming implementation of a proposed solution. The issue will be addressed in time for games next year, and the field is fully playable for practice in the meantime. The Lincoln HS modernization, as it completes the main building for a Fall 2022 student occupancy, remains on schedule and on budget. The team is turning its focus towards the upcoming demolition of the old school building and the construction of new athletic fields and Teen Parent Center on the site. The Benson and MPG modernization project is under construction and on schedule. 2017 Health and Safety projects to address asbestos, lead paint, security and water quality continue forward. Status reports from those parts of the H&S program are attached here. 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. A significant amount of unneeded funding from the Water Quality funding category will be available for use in other H&S categories, but the conversation around how best to utilize that funding is still in early stages.

The 2020 Bond program continues 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, SPED and Security projects. Status reports (attached) were provided on 2020 Capacity (Terwilliger ACCESS Academy, Harrison Park Conversion to MS) and 2020 Infrastructure (Roof, Seismic, Mechanical) projects. ADA, SPED and Security projects, while in development, do not have data to report yet. The Jefferson Modernization project has begun the comprehensive planning process and had its first Comprehensive Planning Committee (CPC) meeting in early June. OSM continues to work with a local recruiting firm to bring on a Senior Project Manager to lead the project team, which is currently moving forward with project activities under guidance of OSM management.

ATTACHMENTS

BAC Meeting – May 25, 2022:

- BAC Agenda_05 25 2022
- BAC Business Equity Utilization Data Constraints
- BAC Presentation_FINAL 05 25 2022
- BAC Report_2017 Health Safety Funding Allocation_05 25 2022
- BAC Status Report_Bond Programs Administration_05 25 2022
- BAC Status Report_2017 Asbestos_05 25 2022
- BAC Status Report_2017 Paint_05 25 2022
- BAC Status Report_2017 Roof_05 25 2022
- BAC Status Report_2017 Security_05 25 2022
- BAC Status Report_2017 Water_05 25 2022
- BAC Status Report_2020 Capacity_05 25 2022
- BAC Status Report_2020 Mechanical_05 25 2022
- BAC Status Report_2020 Roof_05 25 2022
- BAC Status Report_2020 Seismic_05 25 2022
- OSM ORG CHART 4.2022



Agenda

- **Welcome & Introductions** 5:30 – 5:40 pm
- **Program Administration Updates** 5:40 – 6:00 pm
- **2020 Capacity Project Updates** 6:00 – 6:15 pm
- **2020 Infrastructure Project Updates** 6:15 – 6:45 pm
- **2017 Health & Safety Project Updates** 6:45 – 7:15 pm
- **Overview of Project Oversight** 7:15 – 7:30 pm
- **Adjourn** 7:30 pm

**Office of School Modernization - Program
May 2022**

STATUS AT A GLANCE

Legend:

| | |
|--|-----------------------------|
| | As planned: no concerns |
| | Caution: requires attention |
| | Impacts: impacts occurring |

| | As Planned | Caution | Impacts |
|---------|------------|---------|---------|
| Budget | X | | |
| Equity | | X | |
| Overall | X | | |

EQUITY

BUSINESS EQUITY

WORKFORCE EQUITY

| | | MBE | WBE | SDVBE | ESB | N-C | TOTAL | goal | MIN | goal | FEM | goal | APPR | req |
|----------|--------------|------------|---------|-------|-------|-------|---------------|-------|---------------|------|------------|------|------------|-----|
| | | Cumulative | Current | 4.84% | 7.89% | 0.05% | 2.59% | 0.76% | 16.13% | 18% | 28% | 25% | 5% | 14% |
| | Prior Report | 4.83% | 7.69% | 0.05% | 2.56% | 0.67% | 15.80% | | 28% | | 5% | | 24% | |
| 12 Month | Current | 4.26% | 10.71% | 0.00% | 3.65% | 1.32% | 19.94% | 18% | | | | | | |
| | Prior Report | 4.21% | 9.31% | 0.00% | 3.32% | 0.94% | 17.78% | | | | | | | |

Percent of payments made to Certified owned businesses, cumulative and 12-month rolling; Percent of labor hours of apprenticeable trades, cumulative

BUDGET

| 2012 PROGRAM | BUDGET | | FUNDING | | PROGRESS | | FORECAST | |
|-------------------------------|--------------------|--------------------|--------------------|-------------------|--------------------|-----------------------|------------------------|------------------|
| | Original Budget | Current Budget | Bond Funds | Other Funds | Actuals To Date | Additional Encumbered | Estimate At Completion | Over/Under |
| Franklin HS Mod | 81,585,655 | 113,022,577 | 111,040,922 | 1,981,656 | 112,932,069 | - | 112,932,069 | (90,508) |
| Grant HS Mod | 88,336,829 | 158,993,225 | 155,772,451 | 3,220,774 | 158,697,789 | 159,046 | 158,856,835 | (136,390) |
| Roosevelt HS Mod | 68,418,695 | 101,631,108 | 97,127,989 | 4,503,119 | 101,631,108 | - | 101,631,108 | - |
| Faubion Replace | 27,035,537 | 50,115,627 | 34,109,383 | 16,006,244 | 50,028,171 | - | 50,115,627 | - |
| Grant Upper Field | - | 3,246,600 | 3,246,600 | - | 1,881,871 | 1,236,015 | 3,452,330 | 205,730 |
| RHS Phase IV | - | 6,256,244 | 6,252,016 | 4,228 | 6,122,259 | 22,492 | 6,256,244 | - |
| Other Projects | 123,441,923 | 118,319,401 | 113,509,044 | 4,810,357 | 118,319,401 | - | 118,319,401 | - |
| <i>2012 Project Subtotals</i> | | | | | | | | <i>(21,167)</i> |
| Administration | 68,117,563 | 31,482,010 | 31,278,528 | 203,482 | 31,482,010 | - | 31,482,010 | - |
| Contingency | 25,063,798 | 212,328 | 212,328 | - | - | - | - | (212,328) |
| <i>2012 Program Subtotals</i> | | | | | | | | <i>(212,328)</i> |
| Totals | 482,000,000 | 583,279,121 | 552,549,261 | 30,729,860 | 581,094,680 | 1,417,552 | 583,045,626 | (233,496) |

2012 Budget Notes

99% Spent

- Staff are working through closing out all non-active 2012 commitments and projects, and returning unspent funds to the Program.
- Most remaining 2012 funding will go towards Grant Upper Field Improvements, due to pandemic-related cost increases. Any small amounts remaining will be put towards prior add-on project requests at 2012 modernizations (such as additional security cameras at Franklin and Grant).
- Remaining program contingency is being shown for transparency but, as noted above, will go to Grant Upper Fields to address any remaining budget needs and will not be available for any new projects.

Office of School Modernization - Program

May 2022

| 2017 PROGRAM | BUDGET | | FUNDING | | PROGRESS | | FORECAST | |
|--------------------|--------------------|--------------------|--------------------|-------------------|--------------------|-----------------------|------------------------|--------------------|
| | Original Budget | Current Budget | Bond Funds | Other Funds | Actuals To Date | Additional Encumbered | Estimate At Completion | Over/Under |
| Benson HS Mod | 202,000,000 | 153,187,935 | 141,795,313 | 11,392,622 | 57,345,271 | 84,285,736 | 154,215,568 | 1,027,633 |
| Benson Swings | - | 13,790,704 | 13,789,989 | 715 | 11,187,791 | 1,084,630 | 12,763,071 | (1,027,633) |
| MPG Building | - | 2,021,760 | 2,021,760 | - | 2,021,760 | - | 2,021,760 | - |
| Lincoln HS Repl | 187,000,000 | 242,502,250 | 242,500,000 | 2,250 | 163,244,367 | 62,988,503 | 239,106,624 | (3,395,626) |
| Kellogg MS Replace | 45,000,000 | 57,925,586 | 57,697,500 | 228,086 | 57,632,241 | 195,026 | 57,762,407 | (163,178) |
| McDaniel Mod | 146,000,000 | 202,717,847 | 199,000,000 | 3,717,847 | 198,996,241 | 1,548,851 | 200,598,365 | (2,119,482) |
| Health & Safety | - | 154,950,642 | 126,504,356 | 28,446,286 | 134,220,417 | 4,429,235 | 154,950,642 | - |
| | | 99,595,787 | | | | | 2017 Project Subtotals | (5,678,287) |
| Administration | 40,000,000 | 59,919,451 | 58,303,073 | 1,616,378 | 40,549,465 | 1,763,967 | 55,757,129 | (4,162,322) |
| Contingency | 20,000,000 | 14,042,317 | 14,042,317 | - | - | - | 14,042,317 | - |
| Unallocated H&S | 150,000,000 | 23,495,644 | 23,495,644 | - | - | - | 23,495,644 | - |
| | | | | | | | 2017 Program Subtotals | (4,162,322) |
| Totals | 790,000,000 | 924,554,136 | 879,149,952 | 45,404,184 | 665,197,552 | 156,295,947 | 914,713,527 | (9,840,609) |

2017 Budget Notes

76% spent

- OSM is working on shifting the MPG project to be 2020-funded per the 2020 Bond measure. 2020 budget has been added to the project, future encumbrances have been shifted to 2020 funds, and current fiscal year expenditures have also been shifted. While discussion occurs regarding shifting prior year expenditures to the 2020 funds, OSM will report MPG across both 2017 and 2020. MPG is being shown in 2017 with the as-yet-unshifted prior year expenditures against 2017 funds. Actuals and Estimate At Completion reflect those numbers as tied to the 2017 funding. The full Estimate At Completion for MPG is \$76,270,189 and is a combination of the provided 2017 EAC and the 2020 EAC numbers for MPG (which include some non-Bond funds).
- The Kellogg Replacement project has returned funds to the 2017 Program. Funds remaining in the project are being held until all remaining project costs are reconciled. The McDaniel Modernization project returned to the 2017 Program the \$2M it requested for COVID expenses, as the team determined they could cover those expenses with project funds. Other remaining funds are being held in the project until all project scope has been finalized and completed. The Lincoln Modernization project is now forecasting roughly \$3.4M under budget but remains under construction, with Phase 2 not starting until summer 2022.
- Similar to MPG, Benson HS Modernization funding is split between 2017 and 2020. The 2017 Benson HS Modernization information shown above reflects 2017 funding and budget only, with actuals and additional encumbered specific to the 2017 funding as well. The Benson Swings shares total budget/funding with Benson HS Modernization, so the "under" amount of budget in the Benson Swings project will be applied to the Benson HS Modernization and is therefore shown as an "over" amount in the Benson HS Modernization line. The total budget for Benson and Benson swings, not including MPG, across all sources of funding (2017 Bond, 2020 Bond, and non-Bond) is \$333.9M.
- \$22,000,000 was transferred from the 2017 Program Contingency to Benson to fund the previously discussed budget increase.
- 2017 Contingency includes roughly \$8.8M of interest earnings that have been realized in 2020 and 2021. The prior future interest earning forecast of \$12M has been decreased by that amount to a future interest earning forecast of \$3.2M. OSM continues to forecast full use of 2017 Program Contingency for risks due to COVID-related costs on Benson, legal resolution of the CAT issue, and other risk-related issues.

**Office of School Modernization - Program
May 2022**

| 2020 PROGRAM | BUDGET | | FUNDING | | PROGRESS | | FORECAST | |
|----------------------|----------------------|----------------------|----------------------|-------------------|-------------------|-----------------------|-------------------------------|------------|
| | Original Budget | Current Budget | Bond Funds | Other Funds | Actuals To Date | Additional Encumbered | Estimate At Completion | Over/Under |
| Benson 2020 funds | - | 166,925,650 | 166,925,650 | - | 25,548 | 156,868,451 | 166,925,650 | - |
| Jefferson HS Mod | 311,000,000 | 311,000,000 | 311,000,000 | - | - | - | 311,000,000 | - |
| CBSE | 60,000,000 | 60,000,000 | 60,000,000 | - | - | - | 60,000,000 | - |
| Cleveland HS Design | 20,000,000 | 20,000,000 | 20,000,000 | - | - | - | 20,000,000 | - |
| Wilson HS Design | 20,000,000 | 20,000,000 | 20,000,000 | - | - | - | 20,000,000 | - |
| Roosevelt PhV Desigr | 2,000,000 | 2,000,000 | 2,000,000 | - | - | - | 2,000,000 | - |
| MPG Building | 64,000,000 | 74,248,429 | 74,242,429 | 6,000 | 1,405,276 | 69,022,180 | 74,248,429 | - |
| Curriculum* | 53,444,000 | 60,234,067 | 53,444,000 | 6,790,067 | 16,324,604 | 8,965,192 | 60,234,067 | - |
| Technology | 128,200,000 | 134,200,000 | 128,200,000 | 6,000,000 | 49,476,452 | 14,631,023 | 134,200,000 | - |
| Infra Projects | - | 106,357,711 | 101,257,711 | 5,100,000 | 15,356,187 | 26,332,108 | 106,357,711 | - |
| | | | | | | | <i>2020 Project Subtotals</i> | - |
| Administration | 63,098,640 | 63,104,809 | 63,098,641 | 6,168 | 5,760,801 | 359,319 | 63,104,809 | - |
| 2017 Bond Balance | 152,000,000 | - | - | - | - | - | - | - |
| Contingency - OSM | 93,257,360 | 97,669,394 | 97,669,394 | - | - | - | 97,669,394 | - |
| Unalloc Proj Funds | 241,000,000 | 141,009,289 | 141,009,289 | - | - | - | 141,009,289 | - |
| | | | | | | | <i>2020 Project Subtotals</i> | - |
| Totals | 1,208,000,000 | 1,256,749,349 | 1,238,847,114 | 17,902,235 | 88,348,867 | 276,178,273 | 1,256,749,349 | - |

2020 Budget Notes

7% spent

- As noted above in the 2017 Budget Notes, the MPG project is shown here with just its 2020 funds. Until all prior fiscal year costs been transferred to 2020 funding, MPG will be shown in both the 2017 and the 2020 program financials. \$10,242,429 was transferred from 2020 Program Contingency to the MPG project to fund the previously discussed budget increase.
- \$152,000,000 was transferred from the 2017 Bond Balance line item to Benson to fund the previously approved budget. \$14,925,650 was transferred from 2020 Program Contingency to the Benson project to fund the previously discussed budget increase.
- Curriculum numbers on this report reflect only those funds/encumbrances/expenses that are tracked within eBuilder. Other, non-bond funds and expenses may be tracked outside of eBuilder, and will be reflected on Curriculum project status reports only.

| OVERALL BOND PROGRAM | BUDGET | | FUNDING | | PROGRESS | | FORECAST | |
|----------------------|----------------------|----------------------|----------------------|-------------------|----------------------|-----------------------|------------------------|---------------------|
| | Original Budget | Current Budget | Bond Funds | Other Funds | Actuals To Date | Additional Encumbered | Estimate At Completion | Over/Under |
| Totals | 2,480,000,000 | 2,764,582,607 | 2,670,546,327 | 94,036,280 | 1,334,641,099 | 433,891,773 | 2,754,508,501 | (10,074,105) |

Office of School Modernization - Program

May 2022

PROGRAM NOTES

Approved Usage of Bond Funds

- OSM continues to work closely with PPS Finance to ensure individual bond expenditures meet bond compensability requirements. A Bond Compensability Committee meets every week to review compensability questions, particularly regarding technology and curriculum expenditures as these are new (to PPS) uses of bond funding.
- All bond-funded projects are reported to the Bond Accountability Committee. Criteria for selection of projects to be funded by the 2017 Health & Safety allocation have been previously presented to the Board and are available on OSM's webpages. Criteria for long-term selection of projects to be funded by 2020 Infrastructure allocations are being developed and will be shared with the BAC and Board shortly. Some roofing, mechanical, and seismic projects related to urgent health and safety needs or grant-matching deadlines have been moved forward, and are included in OSM reports to the BAC and the Board.

Bond Budget

- Please see budget notes above for more detailed information by bond measure.
- The BAC has requested an updated budget forecast for 2020 Bond projects due to recent pandemic-related cost impacts. Current work is centered around Infrastructure allocations that are not project-specific or tied to a specific number of projects. Many current projects are bidding high, however that may change in future years of this bond funding. Updated estimates will be provided for modernization projects as they complete master planning. Project status updates continue to provide information about any unanticipated cost increases.

Bond Scope

- Active 2012 projects include Grant Upper Field Improvements (in construction). These are the final projects to be funded by 2012 funds.
- The 2017 projects of McDaniel HS Modernization and the Kellogg MS Replacement projects have been occupied. The teams are working through punchlists, small follow-up issues, and closeout. The Lincoln HS Modernization and the Benson HS Modernization projects are under construction. Health & Safety projects addressing asbestos, lead paint, security and water quality continue. Staff are working through returning unused funds from prior Health & Safety projects to the program, to determine next steps for funding additional projects.
- Please see note above about 2020 Infrastructure projects. The Jefferson HS Modernization project has begun contracting with an A/E team for comprehensive master planning and design, and will shortly start meetings with the community-based Comprehensive Plan Committee. Work on the Center for Black Student Excellence currently sits with PPS Community Engagement and other PPS departments, which is moving forward with community engagement that will be closely coordinated with Jefferson comprehensive planning engagement efforts. Work on the comprehensive plans and designs for the Cleveland HS Modernization, the Ida B Wells HS Modernization, and Roosevelt Phase 5 will not start until 2023.

Bond Schedule

- The Grant Upper Field Improvement construction will be primarily complete by the end of June 2022, with some long lead items, such as the scoreboards, arriving later.
- McDaniel HS Modernization and the Kellogg MS Replacement projects opened in Fall 2021. Lincoln is substantially complete but will not issue formal Substantial Completion until mid-June to allow for a better transition to PPS Operations. It remains on schedule to open the buildings (Phase 1) to students in Fall 2022. Work on the athletic fields and teen parent center (Phase 2) will start in Summer 2022. Benson and MPG are on schedule as well.
- Jefferson HS Modernization is slightly behind schedule but anticipates getting back on schedule during comprehensive master planning and design. Comprehensive planning and design for the other modernizations will proceed in 2023 per the previously anticipated schedule. Infrastructure projects are moving forward with urgent needs (see notes above).



School Improvement Bond Update

Bond Accountability Committee

Meeting

May 25, 2022



Agenda

- **Welcome & Introductions** 5:30 – 5:40 pm
- **Program Administration Updates** 5:40 – 6:00 pm
- **2020 Capacity Project Updates** 6:00 – 6:15 pm
- **2020 Infrastructure Project Updates** 6:15 – 6:45 pm
- **2017 Health & Safety Project Updates** 6:45 – 7:15 pm
- **Overview of Project Oversight** 7:15 – 7:30 pm
- **Adjourn** 7:30 pm



Public Comment

*(public comments received via email prior
to the meeting will be read aloud)*



Business Equity Utilization Data Constraints

Business equity utilization data from the B2GNow software system represents a point in time and may not fully represent actual payments received by Certified Businesses. The accuracy of the utilization data is contingent on several factors:

- PPS's payment data from Peoplesoft is uploaded into B2GNow monthly and reflects all payments from PPS to prime contractors during the prior month.
- Accurate data on payments to subcontractors is contingent on prime contractors or upper tier subs entering their subcontractors in B2GNow and subsequently self-reporting their monthly payments to each subcontractor in a timely and accurate manner.
- If prime contractors (or first tier subs) enter payments to first tier or subsequent tier subs in a timely manner, the total equity utilization calculation can be expected to accurately reflect contract expenditures as of approximately one to two months prior to the report date.
- If prime contractors (or first tier subs) do not enter payments to first tier or subsequent tier subs in a timely manner, accurate equity utilization data will be delayed, at times significantly. Even closed contracts may be updated later if PPS learns of new subcontractor payments that were made months or even years prior.



Program Administration Updates



Office of School Modernization - Program
May 2022

STATUS AT A GLANCE

Legend:

- As planned: no concerns
- Caution: requires attention
- Impacts: impacts occurring

| | As Planned | Caution | Impacts |
|---------|------------|---------|---------|
| Budget | X | | |
| Equity | | X | |
| Overall | X | | |

EQUITY

BUSINESS EQUITY

WORKFORCE EQUITY

| | | MBE | WBE | SDVBE | ESB | N-C | TOTAL | goal | MIN | goal | FEM | goal | APPR | req |
|----------|--------------|------------|---------|-------|-------|-------|---------------|-------|---------------|------|------------|------|------------|-----|
| | | Cumulative | Current | 4.84% | 7.89% | 0.05% | 2.59% | 0.76% | 16.13% | 18% | 28% | 25% | 5% | 14% |
| | Prior Report | 4.83% | 7.69% | 0.05% | 2.56% | 0.67% | 15.80% | | 28% | | 5% | | 24% | |
| 12 Month | Current | 4.26% | 10.71% | 0.00% | 3.65% | 1.32% | 19.94% | 18% | | | | | | |
| | Prior Report | 4.21% | 9.31% | 0.00% | 3.32% | 0.94% | 17.78% | | | | | | | |

Percent of payments made to Certified owned businesses, cumulative and 12-month rolling; Percent of labor hours of apprenticeable trades, cumulative

BUDGET

| 2012 PROGRAM | BUDGET | | FUNDING | | PROGRESS | | FORECAST | |
|-------------------|--------------------|--------------------|--------------------|-------------------|--------------------|-----------------------|-------------------------------|------------------|
| | Original Budget | Current Budget | Bond Funds | Other Funds | Actuals To Date | Additional Encumbered | Estimate At Completion | Over/Under |
| Franklin HS Mod | 81,585,655 | 113,022,577 | 111,040,922 | 1,981,656 | 112,932,069 | - | 112,932,069 | (90,508) |
| Grant HS Mod | 88,336,829 | 158,993,225 | 155,772,451 | 3,220,774 | 158,697,789 | 159,046 | 158,856,835 | (136,390) |
| Roosevelt HS Mod | 68,418,695 | 101,631,108 | 97,127,989 | 4,503,119 | 101,631,108 | - | 101,631,108 | - |
| Faubion Replace | 27,035,537 | 50,115,627 | 34,109,383 | 16,006,244 | 50,028,171 | - | 50,115,627 | - |
| Grant Upper Field | - | 3,246,600 | 3,246,600 | - | 1,881,871 | 1,236,015 | 3,452,330 | 205,730 |
| RHS Phase IV | - | 6,256,244 | 6,252,016 | 4,228 | 6,122,259 | 22,492 | 6,256,244 | - |
| Other Projects | 123,441,923 | 118,319,401 | 113,509,044 | 4,810,357 | 118,319,401 | - | 118,319,401 | - |
| | | | | | | | <i>2012 Project Subtotals</i> | <i>(21,167)</i> |
| Administration | 68,117,563 | 31,482,010 | 31,278,528 | 203,482 | 31,482,010 | - | 31,482,010 | - |
| Contingency | 25,063,798 | 212,328 | 212,328 | - | - | - | - | (212,328) |
| | | | | | | | <i>2012 Program Subtotals</i> | <i>(212,328)</i> |
| Totals | 482,000,000 | 583,279,121 | 552,549,261 | 30,729,860 | 581,094,680 | 1,417,552 | 583,045,626 | (233,496) |

2012 Budget Notes

99% Spent

- Staff are working through closing out all non-active 2012 commitments and projects, and returning unspent funds to the Program.
- Most remaining 2012 funding will go towards Grant Upper Field Improvements, due to pandemic-related cost increases. Any small amounts remaining will be put towards prior add-on project requests at 2012 modernizations (such as additional security cameras at Franklin and Grant).
- Remaining program contingency is being shown for transparency but, as noted above, will go to Grant Upper Fields to address any remaining budget needs and will not be available for any new projects.



Office of School Modernization - Program
May 2022

| 2017 PROGRAM | BUDGET | | FUNDING | | PROGRESS | | FORECAST | |
|--------------------|--------------------|--------------------|--------------------|-------------------|--------------------|-----------------------|------------------------|--------------------|
| | Original Budget | Current Budget | Bond Funds | Other Funds | Actuals To Date | Additional Encumbered | Estimate At Completion | Over/Under |
| Benson HS Mod | 202,000,000 | 153,187,935 | 141,795,313 | 11,392,622 | 57,345,271 | 84,285,736 | 154,215,568 | 1,027,633 |
| Benson Swings | - | 13,790,704 | 13,789,989 | 715 | 11,187,791 | 1,084,630 | 12,763,071 | (1,027,633) |
| MPG Building | - | 2,021,760 | 2,021,760 | - | 2,021,760 | - | 2,021,760 | - |
| Lincoln HS Repl | 187,000,000 | 242,502,250 | 242,500,000 | 2,250 | 163,244,367 | 62,988,503 | 239,106,624 | (3,395,626) |
| Kellogg MS Replace | 45,000,000 | 57,925,586 | 57,697,500 | 228,086 | 57,632,241 | 195,026 | 57,762,407 | (163,178) |
| McDaniel Mod | 146,000,000 | 202,717,847 | 199,000,000 | 3,717,847 | 198,996,241 | 1,548,851 | 200,598,365 | (2,119,482) |
| Health & Safety | - | 154,950,642 | 126,504,356 | 28,446,286 | 134,220,417 | 4,429,235 | 154,950,642 | - |
| | | 99,595,787 | | | | | 2017 Project Subtotals | (5,678,287) |
| Administration | 40,000,000 | 59,919,451 | 58,303,073 | 1,616,378 | 40,549,465 | 1,763,967 | 55,757,129 | (4,162,322) |
| Contingency | 20,000,000 | 14,042,317 | 14,042,317 | - | - | - | 14,042,317 | - |
| Unallocated H&S | 150,000,000 | 23,495,644 | 23,495,644 | - | - | - | 23,495,644 | - |
| | | | | | | | 2017 Program Subtotals | (4,162,322) |
| Totals | 790,000,000 | 924,554,136 | 879,149,952 | 45,404,184 | 665,197,552 | 156,295,947 | 914,713,527 | (9,840,609) |

2017 Budget Notes

76% spent

- OSM is working on shifting the MPG project to be 2020-funded per the 2020 Bond measure. 2020 budget has been added to the project, future encumbrances have been shifted to 2020 funds, and current fiscal year expenditures have also been shifted. While discussion occurs regarding shifting prior year expenditures to the 2020 funds, OSM will report MPG across both 2017 and 2020. MPG is being shown in 2017 with the as-yet-unshifted prior year expenditures against 2017 funds. Actuals and Estimate At Completion reflect those numbers as tied to the 2017 funding. The full Estimate At Completion for MPG is \$76,270,189 and is a combination of the provided 2017 EAC and the 2020 EAC numbers for MPG (which include some non-Bond funds).
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- Similar to MPG, Benson HS Modernization funding is split between 2017 and 2020. The 2017 Benson HS Modernization information shown above reflects 2017 funding and budget only, with actuals and additional encumbered specific to the 2017 funding as well. The Benson Swings shares total budget/funding with Benson HS Modernization, so the "under" amount of budget in the Benson Swings project will be applied to the Benson HS Modernization and is therefore shown as an "over" amount in the Benson HS Modernization line. The total budget for Benson and Benson swings, not including MPG, across all sources of funding (2017 Bond, 2020 Bond, and non-Bond) is \$333.9M.
- \$22,000,000 was transferred from the 2017 Program Contingency to Benson to fund the previously discussed budget increase.
- 2017 Contingency includes roughly \$8.8M of interest earnings that have been realized in 2020 and 2021. The prior future interest earning forecast of \$12M has been decreased by that amount to a future interest earning forecast of \$3.2M. OSM continues to forecast full use of 2017 Program Contingency for risks due to COVID-related costs on Benson, legal resolution of the CAT issue, and other risk-related issues.



Office of School Modernization - Program
May 2022

| 2020 PROGRAM | BUDGET | | FUNDING | | PROGRESS | | FORECAST | |
|----------------------|----------------------|----------------------|----------------------|-------------------|-------------------|-----------------------|-------------------------------|------------|
| | Original Budget | Current Budget | Bond Funds | Other Funds | Actuals To Date | Additional Encumbered | Estimate At Completion | Over/Under |
| Benson 2020 funds | - | 166,925,650 | 166,925,650 | - | 25,548 | 156,868,451 | 166,925,650 | - |
| Jefferson HS Mod | 311,000,000 | 311,000,000 | 311,000,000 | - | - | - | 311,000,000 | - |
| CBSE | 60,000,000 | 60,000,000 | 60,000,000 | - | - | - | 60,000,000 | - |
| Cleveland HS Design | 20,000,000 | 20,000,000 | 20,000,000 | - | - | - | 20,000,000 | - |
| Wilson HS Design | 20,000,000 | 20,000,000 | 20,000,000 | - | - | - | 20,000,000 | - |
| Roosevelt PhV Design | 2,000,000 | 2,000,000 | 2,000,000 | - | - | - | 2,000,000 | - |
| MPG Building | 64,000,000 | 74,248,429 | 74,242,429 | 6,000 | 1,405,276 | 69,022,180 | 74,248,429 | - |
| Curriculum* | 53,444,000 | 60,234,067 | 53,444,000 | 6,790,067 | 16,324,604 | 8,965,192 | 60,234,067 | - |
| Technology | 128,200,000 | 134,200,000 | 128,200,000 | 6,000,000 | 49,476,452 | 14,631,023 | 134,200,000 | - |
| Infra Projects | - | 106,357,711 | 101,257,711 | 5,100,000 | 15,356,187 | 26,332,108 | 106,357,711 | - |
| | | | | | | | <i>2020 Project Subtotals</i> | - |
| Administration | 63,098,640 | 63,104,809 | 63,098,641 | 6,168 | 5,760,801 | 359,319 | 63,104,809 | - |
| 2017 Bond Balance | 152,000,000 | - | - | - | - | - | - | - |
| Contingency - OSM | 93,257,360 | 97,669,394 | 97,669,394 | - | - | - | 97,669,394 | - |
| Unalloc Proj Funds | 241,000,000 | 141,009,289 | 141,009,289 | - | - | - | 141,009,289 | - |
| | | | | | | | <i>2020 Project Subtotals</i> | - |
| Totals | 1,208,000,000 | 1,256,749,349 | 1,238,847,114 | 17,902,235 | 88,348,867 | 276,178,273 | 1,256,749,349 | - |

2020 Budget Notes

7% spent

- As noted above in the 2017 Budget Notes, the MPG project is shown here with just its 2020 funds. Until all prior fiscal year costs been transferred to 2020 funding, MPG will be shown in both the 2017 and the 2020 program financials. \$10,242,429 was transferred from 2020 Program Contingency to the MPG project to fund the previously discussed budget increase.
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- Curriculum numbers on this report reflect only those funds/encumbrances/expenses that are tracked within eBuilder. Other, non-bond funds and expenses may be tracked outside of eBuilder, and will be reflected on Curriculum project status reports only.

| OVERALL BOND PROGRAM | BUDGET | | FUNDING | | PROGRESS | | FORECAST | |
|----------------------|----------------------|----------------------|----------------------|-------------------|----------------------|-----------------------|------------------------|---------------------|
| | Original Budget | Current Budget | Bond Funds | Other Funds | Actuals To Date | Additional Encumbered | Estimate At Completion | Over/Under |
| Totals | 2,480,000,000 | 2,764,582,607 | 2,670,546,327 | 94,036,280 | 1,334,641,099 | 433,891,773 | 2,754,508,501 | (10,074,105) |



2020 Capacity Project Updates



2020 Capacity



2020 Capacity
May 2022

PPS Team Leads: Clark Ide
Number of Completed Projects: 0
Number of Active Projects: 2

STATUS AT A GLANCE

Legend:

- As planned: no concerns
- Caution: requires attention
- Impacts: impacts occurring

| | As Planned | Caution | Impacts |
|----------|------------|---------|---------|
| Budget | | | X |
| Equity | | X | |
| Schedule | | X | |
| Overall | | | X |

BUDGET

| | BUDGET | | FUNDING | | PROGRESS | | FORECAST | |
|--------------------------------|-----------------|-------------------|-------------------|-------------|-----------------------------|-----------------------|------------------------|------------------|
| | Original Budget | Current Budget | Capacity Funds | Other Funds | Actuals To Date (all funds) | Additional Encumbered | Estimate At Completion | Over/Under |
| Unallocated Funds | 10,000,000 | 682,078 | 682,078 | - | - | - | - | (682,078) |
| Harrison Park - MS Conv - 5706 | - | 4,917,922 | 4,917,922 | - | 365,165 | 2,481,338 | 11,713,000 | 6,795,078 |
| Terwilliger - ACCESS - 5396 | - | 4,400,000 | 4,400,000 | - | 3,365,106 | 1,694,683 | 7,342,502 | 2,942,502 |
| 2020 Mechanical Totals | | 10,000,000 | 10,000,000 | - | 3,730,271 | 4,176,022 | 19,055,502 | 9,055,502 |

EQUITY

Percent of payments made to Certified owned businesses, percent of labor hours of apprenticeable trades; cumulative

| | MBE | WBE | SDVBE | ESB | N-C | TOTAL | goal | MIN | goal | FEM | goal | APPR | req |
|-------------|-------|--------|-------|-------|-------|--------|------|-----|------|-----|------|------|-----|
| Consultants | 0.00% | 47.53% | 0.00% | 8.46% | 0.00% | 56.00% | 18% | | | | | | |
| Contractors | 0.00% | 0.00% | 0.00% | 0.00% | 0.00% | 0.00% | 18% | | | | | | |
| Overall | 0.00% | 7.74% | 0.00% | 1.38% | 0.00% | 9.12% | 18% | | | | | | |
| Workforce | | | | | | | | 31% | 25% | 8% | 14% | 26% | 20% |

SCHEDULE

| PROJECT | 2022 | | | | | | | | 2023 | | | | | | | |
|--------------------------------|------|-----|-----|-----|-----|-----|-----|-----|------|-----|-----|-----|-----|-----|-----|-----|
| | MAY | JUN | JUL | AUG | SEP | OCT | NOV | DEC | JAN | FEB | MAR | APR | MAY | JUN | JUL | AUG |
| Harrison Park - MS Conv - 5706 | ★ | | | | | | | | | | | | | | | |
| Terwilliger - ACCESS - 5396 | ★ | | | | | | | | | | | | | | | |

- Baseline
- Planning
- Design
- Construction



• New ADA ramp at Main Building entrance



Parking area east of the Main Building with new landscape



New ADA ramp at Modular 1 building



Updated landing and stairs in Main Building library



• Teaching wall in Main Building classroom



Teaching wall in Modular 1 classroom



New counseling offices in Main Building



Construction of new admin suite in Main Building



Architectural renderings of updated entrance and lobby to be completed in Phase I



Architectural renderings of updated cafeteria to be completed in Phase I



Phase 1 (Summer 2022):

- Updates and refreshed finishes at front lobby and main corridor space (including new window from main office into front lobby)
- Updates and refreshed finishes at existing cafeteria space
- Addition of interior and exterior security cameras
- Covered bike rack at front of building
- City-required street improvements and garbage enclosure

Phases 2 and 3 (Summer 2023, Summer 2024):

- Updated landscaping at front entrance
- Restroom improvements, including ADA upgrades, fixture replacement, painting and gender neutral restrooms
- Convert 3 classrooms into science classrooms
- Upgrade the dance studio with new wood sprung floor, sound system, mirrors, and replacement of temporary wall
- Create STEAM/Maker lab
- New lockers
- Interior renovation to create counseling, SPED and community partner office space
- Updates and refreshed finishes in general education classrooms
- Renovate locker rooms
- Replace mechanical system



2020 Infrastructure Project Updates



2020 Infrastructure: Roof



2020 Infrastructure: Roof
May 2022

PPS Team Leads: Steve Simonson, Clark Ide
Number of Completed Projects: 0
Number of Active Projects: 14

STATUS AT A GLANCE

Legend:

- As planned: no concerns
- Caution: requires attention
- Impacts: impacts occurring

| | As Planned | Caution | Impacts |
|----------|------------|---------|---------|
| Budget | X | | |
| Equity | X | | |
| Schedule | X | | |
| Overall | X | | |

BUDGET

| | BUDGET | | FUNDING | | PROGRESS | | FORECAST | |
|------------------------------------|-----------------|-------------------|-------------------|-------------|------------------|-----------------------|------------------------|---------------------|
| | Original Budget | Current Budget | Bond Funds | Other Funds | Actuals To Date | Additional Encumbered | Estimate At Completion | Over/Under |
| Unallocated Funds | 65,700,000 | 14,134,480 | 14,134,480 | - | - | - | - | (14,134,480) |
| 2020 Bond Roof Assessments - 5578 | - | 213,785 | 213,785 | - | 184,914 | - | 213,785 | - |
| Ainsworth Annex-Re-Roof-5792 | - | 2,008,610 | 2,008,610 | - | 71,805 | 1,757,051 | 2,008,610 | - |
| Chavez-Partial Re-Roof-5791 | - | 1,343,656 | 1,343,656 | - | 125,412 | 49,596 | 2,327,982 | 984,326 |
| Duniway - Re-Roof Phase 1 - 5667 | - | 3,636,691 | 3,636,691 | - | 3,052,683 | 41,088 | 3,105,054 | (531,637) |
| Duniway - Re-Roof Phase II - 55894 | - | 3,461,147 | 3,461,147 | - | - | 4,259 | 3,461,147 | - |
| Glencoe-Re-Roof-5790 | - | 6,783,914 | 6,783,914 | - | 431,910 | 5,714,253 | 7,524,511 | 740,597 |
| Markham-Partial Re-Roof-5896 | - | 3,565,722 | 3,565,722 | - | - | - | 3,565,722 | - |
| Meek - Re-Roof-Bond - 5895 | - | 5,599,585 | 5,599,585 | - | - | - | 5,599,585 | - |
| MLC - 2020 Bond - 5668 | - | 3,850,912 | 3,850,912 | - | 1,253,508 | 1,833,912 | 3,850,912 | - |
| Richmond-Partial Re-Roof-5911 | - | 2,156,776 | 2,156,776 | - | - | - | 2,156,776 | - |
| Rieke - Re-Roof - 5909 | - | 3,054,814 | 3,054,814 | - | - | 2,391,129 | 3,054,814 | - |
| Skyline - Partial ReRoof-5912 | - | 1,727,817 | 1,727,817 | - | - | - | 1,727,817 | - |
| Vernon-Partial Re-Roof-5913 | - | 3,896,832 | 3,896,832 | - | - | - | 3,896,832 | - |
| West Sylvan-Re-Roof-5789 | - | 7,551,047 | 7,551,047 | - | 46,451 | 544,037 | 7,551,047 | - |
| Winterhaven-Partial ReRoof-5914 | - | 2,714,212 | 2,714,212 | - | - | - | 2,714,212 | - |
| 2020 Roof Totals | | 65,700,000 | 65,700,000 | - | 5,166,682 | 12,335,325 | 52,758,805 | (12,941,195) |



2020 Infrastructure: Roof



2020 Infrastructure: Roof
May 2022

PPS Team Leads: Steve Simonson, Clark Ide
Number of Completed Projects: 0
Number of Active Projects: 14

EQUITY *Percent of payments made to Certified owned businesses, percent of labor hours of apprenticeable trades; cumulative*

| | MBE | WBE | SDVBE | ESB | N-C | TOTAL | goal | MIN | goal | FEM | goal | APPR | req |
|-------------|-------|--------|-------|-------|-------|--------|------|-----|------|-----|------|------|-----|
| Consultants | 0.00% | 77.90% | 0.00% | 0.00% | 0.00% | 77.90% | 18% | | | | | | |
| Contractors | 7.55% | 1.85% | 0.00% | 0.63% | 0.00% | 10.04% | 18% | | | | | | |
| Overall | 6.27% | 14.75% | 0.00% | 0.53% | 0.00% | 21.55% | 18% | | | | | | |
| Workforce | | | | | | | | 41% | 25% | 11% | 14% | 25% | 20% |

SCHEDULE

| PROJECT | 2022 | | | | | | | | 2023 | | | | | | | |
|------------------------------------|------|-----|-----|-----|-----|-----|-----|-----|------|-----|-----|-----|-----|-----|-----|-----|
| | MAY | JUN | JUL | AUG | SEP | OCT | NOV | DEC | JAN | FEB | MAR | APR | MAY | JUN | JUL | AUG |
| 2020 Bond Roof Assessments - 5578 | ★ | | | | | | | | | | | | | | | |
| Ainsworth Annex-Re-Roof-5792 | ★ | | | | | | | | | | | | | | | |
| Chavez-Partial Re-Roof-5791 | ★ | | | | | | | | | | | | | | | |
| Duniway - Re-Roof Phase 1 - 5667 | ★ | | | | | | | | | | | | | | | |
| Duniway - Re-Roof Phase II - 55894 | ★ | | | | | | | | | | | | | | | |
| Glencoe-Re-Roof-5790 | ★ | | | | | | | | | | | | | | | |
| Markham-Partial Re-Roof-5896 | ★ | | | | | | | | | | | | | | | |
| Meek - Re-Roof-Bond - 5895 | ★ | | | | | | | | | | | | | | | |
| MLC - 2020 Bond - 5668 | ★ | | | | | | | | | | | | | | | |
| Richmond-Partial Re-Roof-5911 | ★ | | | | | | | | | | | | | | | |
| Rieke - Re-Roof - 5909 | ★ | | | | | | | | | | | | | | | |
| Skyline - Partial ReRoof-5912 | ★ | | | | | | | | | | | | | | | |
| Vernon-Partial Re-Roof-5913 | ★ | | | | | | | | | | | | | | | |
| West Sylvan-Re-Roof-5789 | ★ | | | | | | | | | | | | | | | |
| Winterhaven-Partial ReRoof-5914 | ★ | | | | | | | | | | | | | | | |

Baseline
 Planning
 Design
 Construction



2020 Infrastructure: Seismic



2020 Infrastructure: Seismic
May 2022

PPS Team Leads: Robert Jole
Number of Completed Projects: 0
Number of Active Projects: 2

STATUS AT A GLANCE

Legend:

| | |
|--|-----------------------------|
| | As planned: no concerns |
| | Caution: requires attention |
| | Impacts: impacts occurring |

| | As Planned | Caution | Impacts |
|----------|------------|---------|---------|
| Budget | X | | |
| Equity | | X | |
| Schedule | X | | |
| Overall | | X | |

BUDGET

| | BUDGET | | FUNDING | | PROGRESS | | FORECAST | |
|---------------------------------|-----------------|-------------------|-------------------|------------------|-----------------------------|-----------------------|------------------------|--------------------|
| | Original Budget | Current Budget | Seismic Funds | Other Funds | Actuals To Date (all funds) | Additional Encumbered | Estimate At Completion | Over/Under |
| Unallocated Funds | 17,200,000 | 6,965,291 | 6,965,291 | - | - | - | - | (6,965,291) |
| Creative Science-SRGP-5712-FY21 | - | 7,508,896 | 5,008,896 | 2,500,000 | 469,056 | 5,599,150 | 7,508,896 | - |
| Lent-SRGP-5421-FY21 | - | 7,825,813 | 5,225,813 | 2,600,000 | 5,596,533 | 1,542,196 | 7,825,813 | - |
| 2020 Seismic Totals | | 22,300,000 | 17,200,000 | 5,100,000 | 6,065,590 | 7,141,346 | 15,334,709 | (6,965,291) |

EQUITY

Percent of payments made to Certified owned businesses, percent of labor hours of apprenticeable trades; cumulative

| | MBE | WBE | SDVBE | ESB | N-C | TOTAL | goal | MIN | goal | FEM | goal | APPR | req |
|-------------|-------|--------|-------|-------|-------|--------|------|-----|------|-----|------|------|-----|
| Consultants | 0.00% | 33.49% | 0.00% | 0.00% | 0.00% | 33.49% | 18% | | | | | | |
| Contractors | 3.68% | 0.00% | 0.00% | 4.52% | 0.00% | 8.20% | 18% | | | | | | |
| Overall | 3.03% | 5.93% | 0.00% | 3.72% | 0.00% | 12.67% | 18% | | | | | | |
| Workforce | | | | | | | | 50% | 25% | 7% | 14% | 16% | 20% |

SCHEDULE

| PROJECT | 2022 | | | | | | | | 2023 | | | | | | | |
|---------------------------------|------|-----|-----|-----|-----|-----|-----|-----|------|-----|-----|-----|-----|-----|-----|-----|
| | MAY | JUN | JUL | AUG | SEP | OCT | NOV | DEC | JAN | FEB | MAR | APR | MAY | JUN | JUL | AUG |
| Creative Science-SRGP-5421-FY21 | ★ | | | | | | | | | | | | | | | |
| Lent-SRGP-5421-FY21 | ★ | | | | | | | | | | | | | | | |

Baseline
Planning
Design
Construction



2020 Infrastructure: Mechanical



2020 Infrastructure: Mechanical
May 2022

PPS Team Leads: Steve Simonson, Clark Ide
Number of Completed Projects: 0
Number of Active Projects: 4

STATUS AT A GLANCE

Legend:

| | |
|--|-----------------------------|
| | As planned: no concerns |
| | Caution: requires attention |
| | Impacts: impacts occurring |

| | As Planned | Caution | Impacts |
|----------|------------|---------|---------|
| Budget | X | | |
| Equity | X | | |
| Schedule | X | | |
| Overall | X | | |

BUDGET

| | BUDGET | | FUNDING | | PROGRESS | | FORECAST | |
|-------------------------------|-----------------|-------------------|-------------------|-------------|-----------------------------|-----------------------|------------------------|---------------------|
| | Original Budget | Current Budget | Mech Funds | Other Funds | Actuals To Date (all funds) | Additional Encumbered | Estimate At Completion | Over/Under |
| Unallocated Funds | 75,000,000 | 46,426,028 | 46,426,028 | - | - | - | - | (46,426,028) |
| 2020 Bond Mech Assess - 5626 | - | 83,720 | 83,720 | - | 63,000 | 6,800 | 83,720 | - |
| Bridger-Mech Upgrades-5827 | - | 7,342,502 | 7,342,502 | - | 24,586 | 777,028 | 7,342,502 | - |
| Kelly-Mech Upgrades-5828 | - | 9,434,661 | 9,434,661 | - | 22,365 | 900,698 | 9,434,661 | - |
| Lent-Mech Upgrades-5829 | - | 11,713,089 | 11,713,089 | - | 219,464 | 906,151 | 11,713,089 | - |
| 2020 Mechanical Totals | | 75,000,000 | 75,000,000 | - | 329,415 | 2,590,677 | 28,573,972 | (46,426,028) |

EQUITY* Percent of payments made to Certified owned businesses, percent of labor hours of apprenticeable trades; cumulative

| | MBE | WBE | SDVBE | ESB | N-C | TOTAL | goal | MIN | goal | FEM | goal | APPR | req |
|-------------|-------|--------|-------|-------|-------|--------|------|-----|------|-----|------|------|-----|
| Consultants | 0.00% | 73.79% | 0.00% | 0.00% | 0.00% | 73.79% | 18% | | | | | | |
| Contractors | 0.00% | 0.00% | 0.00% | 0.00% | 0.00% | 0.00% | 18% | | | | | | |
| Overall | 0.00% | 73.79% | 0.00% | 0.00% | 0.00% | 73.79% | 18% | | | | | | |
| Workforce | | | | | | | | 0% | 25% | 0% | 14% | 0% | 20% |

*There have been no construction payments to date.



2020 Infrastructure: Mechanical



2020 Infrastructure: Mechanical

May 2022

PPS Team Leads: Steve Simonson, Clark Ide

Number of Completed Projects: 0

Number of Active Projects: 4

SCHEDULE

| PROJECT | 2022 | | | | | | | | 2023 | | | | | | | |
|------------------------------|------|-----|-----|-----|-----|-----|-----|-----|------|-----|-----|-----|-----|-----|-----|-----|
| | MAY | JUN | JUL | AUG | SEP | OCT | NOV | DEC | JAN | FEB | MAR | APR | MAY | JUN | JUL | AUG |
| 2020 Bond Mech Assess - 5626 | ★ | | | | | | | | | | | | | | | |
| Bridger-Mech Upgrades-5827 | ★ | | | | | | | | | | | | | | | |
| Kelly-Mech Upgrades-5828 | ★ | | | | | | | | | | | | | | | |
| Lent-Mech Upgrades-5829 | ★ | | | | | | | | | | | | | | | |

| | | | | | | | | | |
|----------|--|--|----------|--|--|--------|--|--|--------------|
| Baseline | | | Planning | | | Design | | | Construction |
|----------|--|--|----------|--|--|--------|--|--|--------------|



2017 Health & Safety Project Updates



Health & Safety: Asbestos Remediation
May 2022

PPS Team Lead: Glenn Bryant
Number of Completed Projects: 25
Number of Active Projects: 8

STATUS AT A GLANCE

Legend:

| | |
|--|-----------------------------|
| | As planned: no concerns |
| | Caution: requires attention |
| | Impacts: impacts occurring |

| | As Planned | Caution | Impacts |
|----------|------------|---------|---------|
| Budget | X | | |
| Equity | X | | |
| Schedule | X | | |
| Overall | X | | |

BUDGET

| | BUDGET | | FUNDING | | PROGRESS | | FORECAST | |
|------------------------------------|-----------------|----------------|----------------|-------------|-----------------------------|-----------------------|------------------------|-------------|
| | Original Budget | Current Budget | Asbestos Funds | Other Funds | Actuals To Date (all funds) | Additional Encumbered | Estimate At Completion | Over/Under |
| Unallocated Funds | 12,000,000 | 3,000,753 | 3,000,753 | - | - | - | - | (3,000,753) |
| Beaumont - 5373 - FY20 | - | 169,985 | 169,985 | - | 169,985 | - | 169,985 | - |
| Capitol Hill - 5275 - FY20 | - | 93,134 | 93,134 | - | 93,134 | - | 93,134 | - |
| Chapman - 5377 - FY20 | - | 89,983 | 89,983 | - | 89,983 | - | 89,983 | - |
| Gray 2021 - 5673 - FY21 | - | 123,025 | 123,025 | - | 123,025 | - | 123,025 | - |
| Gray 2022 - 5947 - FY22 | - | 53,350 | 53,350 | - | - | - | 53,350 | - |
| GROUP 3 (IP 2017) | - | 66,361 | 66,361 | - | 66,361 | - | 66,361 | - |
| GROUP 4 - ASBESTOS | - | 1,392,403 | 1,392,403 | - | 1,392,403 | - | 1,392,403 | - |
| Harrison Park - Copy - 4664 - FY18 | - | 10,185 | 10,185 | - | 10,185 | - | 10,185 | - |
| Harrison Park - K - 4441 - FY18 | - | 24,009 | 24,009 | - | 24,009 | - | 24,009 | - |
| Harrison Park 2022 - 5946 - FY22 | - | 36,087 | 36,087 | - | - | 8,820 | 36,087 | - |
| Hosford 2020 - 5363 - FY20 | - | 199,986 | 199,986 | - | 199,986 | - | 199,986 | - |
| Hosford 2021 - 5671 - FY21 | - | 77,262 | 77,262 | - | 77,262 | - | 77,262 | - |
| Hosford Wood Shop- 4573 - FY18 | - | 41,523 | 41,523 | - | 41,523 | - | 41,523 | - |
| Jefferson 2021 - 5361 - FY21 | - | 34,738 | 34,738 | - | 34,738 | - | 34,738 | - |
| King 2022 - 5949 - FY22 | - | 884,213 | 884,213 | - | - | - | 884,213 | - |
| Lane - 5361 - FY20 | - | 89,849 | 89,849 | - | 89,849 | - | 89,849 | - |
| Middle School Conv - 4586-FY18 | - | 32,540,735 | 658,511 | 31,882,224 | 32,326,731 | - | 32,540,735 | - |
| Asbestos Bond Projs - 4923 - FY19 | - | 1,254,069 | 1,254,069 | - | 1,254,069 | - | 1,254,069 | - |
| Asbestos Bond Projs - 4924 - FY20 | - | 45,128 | 45,128 | - | 45,128 | - | 45,128 | - |
| Asbestos Bond Projs - 4925 - FY21 | - | 233,410 | 233,410 | - | 123,717 | 47,958 | 233,410 | - |
| Asbestos Bond Projs - 5826 - FY22 | - | 113,192 | 113,192 | - | 53,216 | 52,474 | 113,192 | - |
| Floor Replacement- 4565 - FY18 | - | 101,044 | 101,044 | - | 101,044 | - | 101,044 | - |



2017 H&S: Asbestos Remediation



Health & Safety: Asbestos Remediation
May 2022

PPS Team Lead: Glenn Bryant
Number of Completed Projects: 25
Number of Active Projects: 8

| | | | | | | | | |
|--------------------------------|---|-------------------|-------------------|-------------------|-------------------|----------------|-------------------|--------------------|
| Rigler - 5369 - FY20 | - | 177,837 | 177,837 | - | 177,837 | - | 177,837 | - |
| Stephenson - 5362 - FY20 | - | 150,288 | 150,288 | - | 150,288 | - | 150,288 | - |
| Stephenson 2022 - 5950 - FY22 | | 237,930 | 237,930 | - | - | - | 237,930 | - |
| Vernon 2020 - 5374 - FY20 | - | 74,708 | 74,708 | - | 74,708 | - | 74,708 | - |
| Vernon 2021 - 5675 - FY20 | - | 84,981 | 84,981 | - | 84,751 | - | 84,981 | - |
| Vestal - 5367 - FY20 | - | 181,485 | 181,485 | - | 181,485 | - | 181,485 | - |
| Winterhaven - 5676 - FY20 | - | 160,383 | 160,383 | - | 160,133 | - | 160,383 | - |
| Winterhaven 2022 - 5951 - FY22 | - | 569,965 | 569,965 | - | - | - | 569,965 | - |
| Woodstock - 5368 - FY20 | - | 192,408 | 192,408 | - | 192,408 | - | 192,408 | - |
| Woodstock - Hall - 4738 - FY18 | - | 8,614 | 8,614 | - | 8,614 | - | 8,614 | - |
| Woodstock 2022 - 5952 - FY22 | - | 409,200 | 409,200 | - | - | - | 409,200 | - |
| Asbestos Totals | | 42,922,224 | 11,040,000 | 31,882,224 | 37,346,572 | 109,252 | 39,921,471 | (3,000,753) |

EQUITY* *Percent of payments made to Certified owned businesses, percent of labor hours of apprenticeable trades; cumulative*

| | MBE | WBE | SDVBE | ESB | N-C | TOTAL | goal | MIN | goal | FEM | goal | APPR | req |
|-------------|--------|-------|-------|-------|-------|--------|------|-----|------|-----|------|------|-----|
| Consultants | 21.12% | 2.35% | 0.00% | 0.00% | 8.07% | 31.54% | 18% | | | | | | |
| Contractors | 42.45% | 0.00% | 0.00% | 0.00% | 0.00% | 42.45% | 18% | | | | | | |
| Overall | 37.58% | 0.54% | 0.00% | 0.00% | 1.84% | 39.96% | 18% | | | | | | |
| Workforce* | | | | | | | | N/A | 25% | N/A | 14% | N/A | 20% |

*Workforce Equity requirements are only applied to Public Improvement (construction) contracts over \$200,000. There is currently no data to report.

SCHEDULE

| PROJECT | 2022 | | | | | | | | 2023 | | | | | | | |
|-------------------------------|------|-----|-----|-----|-----|-----|-----|-----|------|-----|-----|-----|-----|-----|-----|-----|
| | MAY | JUN | JUL | AUG | SEP | OCT | NOV | DEC | JAN | FEB | MAR | APR | MAY | JUN | JUL | AUG |
| 2022 summer projects | ★ | | | | | | | | | | | | | | | |
| upcoming 2023 summer projects | ★ | | | | | | | | | | | | | | | |

Baseline
Planning
Design
Construction



2017 H&S: Lead Paint Stabilization



Health & Safety: Lead Paint Stabilization
May 2022

PPS Team Lead: Chris Boyce
Number of Completed Projects: 2
Number of Active Projects: 5

STATUS AT A GLANCE

Legend:

| | |
|--|-----------------------------|
| | As planned: no concerns |
| | Caution: requires attention |
| | Impacts: impacts occurring |

| | As Planned | Caution | Impacts |
|----------|------------|---------|---------|
| Budget | X | | |
| Equity | | | X |
| Schedule | X | | |
| Overall | X | | |

BUDGET

| | BUDGET | | FUNDING | | PROGRESS | | FORECAST | |
|--|-------------------|-------------------|-------------------|------------------|-----------------------------|-----------------------|------------------------|--------------------|
| | Original Budget | Current Budget | Paint Funds | Other Funds | Actuals To Date (all funds) | Additional Encumbered | Estimate At Completion | Over/Under |
| Unallocated Funds | 16,623,936 | 3,790,587 | 3,790,587 | - | - | - | - | (3,790,587) |
| Mult Sites - 5466 | - | 4,100,000 | 4,000,000 | 100,000 | 1,577,386 | 99,986 | 4,100,000 | - |
| Mult Sites - Emerg Dec - 4284 - FY17 | - | 1,273,500 | 395,243 | 878,257 | 1,273,500 | - | 1,273,500 | - |
| Mult Sites - 4493 - FY17 | - | 577,003 | 438,795 | 138,209 | 438,795 | - | 577,003 | - |
| Mult Sites - PacIndPaint - 5495 - FY21 | - | 1,500,000 | 1,500,000 | - | 11,509 | 991 | 1,500,000 | - |
| Mult Sites - ASA - 5550 - FY21 | - | 1,500,000 | 1,500,000 | - | - | - | 1,500,000 | - |
| Mult Sites - Fulcrum - 5551 - FY21 | - | 1,500,000 | 1,500,000 | - | - | - | 1,500,000 | - |
| Mult Sites - First Cascade - 5552 - FY21 | - | 1,500,000 | 1,500,000 | - | 200,400 | - | 1,500,000 | - |
| Lead Paint Totals | 16,623,936 | 15,741,090 | 14,624,624 | 1,116,466 | 3,501,590 | 100,977 | 11,950,503 | (3,790,587) |

EQUITY* Percent of payments made to Certified owned businesses, percent of labor hours of apprenticeable trades; cumulative

| | MBE | WBE | SDVBE | ESB | N-C | TOTAL | goal | MIN | goal | FEM | goal | APPR | req |
|-------------|-------|-------|-------|-------|-------|--------------|------|-----|------|-----|------|------|-----|
| Consultants | 0.00% | 0.00% | 0.00% | 0.00% | 0.00% | 0.00% | 18% | | | | | | |
| Contractors | 0.00% | 0.00% | 0.00% | 0.00% | 0.00% | 0.00% | 18% | | | | | | |
| Overall | 0.00% | 0.00% | 0.00% | 0.00% | 0.00% | 0.00% | 18% | | | | | | |
| Workforce** | | | | | | | | N/A | 25% | N/A | 14% | N/A | 20% |

** See note below in Progress.

** Workforce Equity requirements are only applied to Public Improvement (construction) contracts over \$200,000. There is currently no data to report.



2017 H&S: Lead Paint Stabilization



Health & Safety: Lead Paint Stabilization
May 2022

PPS Team Lead: Chris Boyce
Number of Completed Projects: 2
Number of Active Projects: 5

SCHEDULE

| PROJECT | 2022 | | | | | | | | 2023 | | | | | | | |
|--|------|-----|-----|-----|-----|-----|-----|-----|------|-----|-----|-----|-----|-----|-----|-----|
| | MAY | JUN | JUL | AUG | SEP | OCT | NOV | DEC | JAN | FEB | MAR | APR | MAY | JUN | JUL | AUG |
| Mult Sites - 5466 | ★ | | | | | | | | | | | | | | | |
| Mult Sites - PacIndPaint - 5495 - FY21 | ★ | | | | | | | | | | | | | | | |
| Mult Sites - ASA - 5550 - FY21 | ★ | | | | | | | | | | | | | | | |
| Mult Sites - Fulcrum - 5551 - FY21 | ★ | | | | | | | | | | | | | | | |
| Mult Sites - First Cascade - 5552 - FY21 | ★ | | | | | | | | | | | | | | | |

Baseline

Planning

Design

Construction



2017 H&S: Roof Improvements



Health & Safety: Roof Improvements
May 2022

PPS Team Leads: Steve Simonson, Robert Jole
Number of Completed Projects: 15
Number of Active Projects: 3

STATUS AT A GLANCE

Legend:

| | |
|--|-----------------------------|
| | As planned: no concerns |
| | Caution: requires attention |
| | Impacts: impacts occurring |

| | As Planned | Caution | Impacts |
|----------|------------|---------|---------|
| Budget | X | | |
| Equity | X | | |
| Schedule | X | | |
| Overall | X | | |

BUDGET

| | BUDGET | | FUNDING | | PROGRESS | | FORECAST | |
|---------------------------------|-----------------|--------------------|-------------------|-------------------|-----------------------------|-----------------------|------------------------|--------------------|
| | Original Budget | Current Budget | Roof Funds | Other Funds | Actuals To Date (all funds) | Additional Encumbered | Estimate At Completion | Over/Under |
| Unallocated Funds | 50,907,949 | 3,047,111 | 3,047,111 | - | - | - | - | (3,047,111) |
| Chapman - 4671 - FY18 | - | 4,036,707 | 3,987,307 | 49,400 | 4,036,707 | - | 4,036,707 | - |
| Duniway - 5420 - FY21 | - | 949,503 | 938,007 | 11,496 | 472,173 | 151,182 | 949,503 | - |
| GROUP 3 (IP 2017) | - | 22,320,057 | 10,648,856 | 11,671,201 | 21,950,786 | - | 22,320,057 | - |
| Harrison Park - 5321 - FY20 | - | 2,746,774 | 2,680,274 | 66,500 | 2,746,674 | - | 2,746,774 | - |
| Hayhurst - SRGP - 5028 - FY19 | - | 4,576,977 | 2,076,977 | 2,500,000 | 4,092,889 | - | 4,576,977 | - |
| Jackson - 5030 - FY19 | - | 3,972,722 | 3,972,722 | - | 3,968,943 | 443 | 3,972,722 | - |
| Kelly - 5319 - FY20 | - | 1,649,098 | 1,649,098 | - | 1,649,098 | - | 1,649,098 | - |
| Lee - 4497 - FY18 | - | 97,000 | 96,750 | 250 | 97,000 | - | 97,000 | - |
| MLC - 5422 - FY21 | - | 659,699 | 659,699 | - | 546,841 | 88,528 | 659,699 | - |
| Mt Tabor - 5320 - FY20 | - | 3,022,689 | 3,022,689 | - | 3,022,689 | - | 3,022,689 | - |
| Middle School Conv - 4586-FY18 | - | 32,540,735 | 3,781,759 | 28,758,976 | 32,326,731 | - | 32,540,735 | - |
| Group 1 Design - 5153 - FY20 | - | 751,521 | 751,521 | - | 751,521 | - | 751,521 | - |
| Group 2 Design - 5154 - FY20 | - | 1,146,401 | 1,146,401 | - | 1,146,401 | - | 1,146,401 | - |
| Ockley Green - 5322 - FY20 | - | 1,957,686 | 1,871,486 | 86,200 | 1,957,686 | - | 1,957,686 | - |
| Rieke - 5423 - FY21 | - | 367,693 | 367,693 | - | 266,871 | 96,759 | 367,693 | - |
| Rigler - 5029 - FY19 | - | 9,671,934 | 7,173,566 | 2,498,368 | 9,671,934 | - | 9,671,934 | - |
| Sitton - 5027 - FY19 | - | 6,746,662 | 3,468,883 | 3,277,779 | 6,744,662 | - | 6,746,662 | - |
| Woodlawn - 5323 - FY20 | - | 1,699,984 | 1,645,634 | 54,350 | 1,699,984 | - | 1,699,984 | - |
| Roof Improvements Totals | | 101,960,955 | 52,986,434 | 48,974,521 | 97,149,591 | 336,912 | 98,913,843 | (3,047,111) |



2017 H&S: Roof Improvements



Health & Safety: Roof Improvements

May 2022

PPS Team Leads: Steve Simonson, Robert Jole

Number of Completed Projects: 15

Number of Active Projects: 3

EQUITY* *Percent of payments made to Certified owned businesses, percent of labor hours of apprenticeable trades; cumulative*

| | MBE | WBE | SDVBE | ESB | N-C | TOTAL | goal | MIN | goal | FEM | goal | APPR | req |
|-------------|-------|--------|-------|-------|-------|---------------|------|-----|------|-----|------|------------|-----|
| Consultants | 0.38% | 34.60% | 0.00% | 1.46% | 0.59% | 37.03% | 18% | | | | | | |
| Contractors | 2.33% | 10.65% | 0.00% | 3.21% | 0.00% | 16.19% | 18% | | | | | | |
| Overall | 2.16% | 12.76% | 0.00% | 3.05% | 0.05% | 18.03% | 18% | | | | | | |
| Workforce | | | | | | | | 37% | 25% | 6% | 14% | 28% | 20% |

*Equity numbers are for Consolidated projects, which include roof and accessibility improvements.

SCHEDULE

| PROJECT | 2022 | | | | | | | | 2023 | | | | | | | |
|-----------------------|------|-----|-----|-----|-----|-----|-----|-----|------|-----|-----|-----|-----|-----|-----|-----|
| | MAY | JUN | JUL | AUG | SEP | OCT | NOV | DEC | JAN | FEB | MAR | APR | MAY | JUN | JUL | AUG |
| Duniway - 5420 - FY21 | ★ | | | | | | | | | | | | | | | |
| MLC - 5422 - FY21 | ★ | | | | | | | | | | | | | | | |
| Rieke - 5423 - FY21 | ★ | | | | | | | | | | | | | | | |

| | | | |
|----------|----------|--------|--------------|
| Baseline | Planning | Design | Construction |
|----------|----------|--------|--------------|



2017 H&S: Security



Health & Safety: Security
May 2022

PPS Team Lead: Eric Naes
Number of Completed Projects: 5
Number of Active Projects: 2

STATUS AT A GLANCE

Legend:

| | |
|--|-----------------------------|
| | As planned: no concerns |
| | Caution: requires attention |
| | Impacts: impacts occurring |

| | As Planned | Caution | Impacts |
|----------|------------|---------|---------|
| Budget | X | | |
| Equity | | | X |
| Schedule | | | X |
| Overall | | | X |

BUDGET

| | BUDGET | | FUNDING | | PROGRESS | | FORECAST | |
|--------------------------------|------------------|-------------------|------------------|-------------------|-----------------------------|-----------------------|------------------------|--------------------|
| | Original Budget | Current Budget | Security Funds | Other Funds | Actuals To Date (all funds) | Additional Encumbered | Estimate At Completion | Over/Under |
| Unallocated Funds | 5,000,000 | 716,103 | 716,103 | - | - | - | - | (716,103) |
| Benson-Kenton - 5013 | - | 1,895,507 | 69,646 | 1,825,861 | 1,687,427 | 48,035 | 1,895,507 | - |
| Creative Science - 5049 - FY20 | - | 12,855 | 12,855 | - | 12,855 | - | 12,855 | - |
| Jefferson - 4528 - FY17 | - | 30,859 | 30,859 | - | 30,859 | - | 30,859 | - |
| 4675-Security-PKG1 FY18-19 | - | 2,512,541 | 2,512,541 | - | 1,834,984 | 619,688 | 2,508,157 | (4,384) |
| 5025-Security-PKG2-FY19 | - | 2,419,821 | 2,419,821 | - | 2,048,635 | 5,890 | 2,054,525 | (365,296) |
| 5026-Security-PKG3-FY19 | - | 3,256,981 | 3,256,981 | - | 3,256,981 | - | 3,256,981 | - |
| Middle School Conv - 4586-FY18 | - | 32,540,735 | 303,414 | 32,237,321 | 32,326,731 | - | 32,540,735 | - |
| Security Totals | 5,000,000 | 43,385,403 | 9,322,221 | 34,063,182 | 41,198,472 | 673,613 | 42,299,620 | (1,085,783) |

EQUITY

Percent of payments made to Certified owned businesses, percent of labor hours of apprenticeable trades; cumulative

| | MBE | WBE | SDVBE | ESB | N-C | TOTAL | goal | MIN | goal | FEM | goal | APPR | req |
|-------------|-------|--------|-------|-------|-------|---------------|------|-----|------|-----|------|------------|-----|
| Consultants | 0.00% | 93.32% | 0.00% | 0.00% | 0.00% | 93.32% | 18% | | | | | | |
| Contractors | 0.00% | 0.00% | 0.00% | 0.17% | 0.00% | 0.17% | 18% | | | | | | |
| Overall | 0.00% | 2.95% | 0.00% | 0.16% | 0.00% | 3.12% | 18% | | | | | | |
| Workforce | | | | | | | | 17% | 25% | 3% | 14% | 38% | 20% |



2017 H&S: Security



Health & Safety: Security
May 2022

PPS Team Lead: Eric Naes
Number of Completed Projects: 5
Number of Active Projects: 2

SCHEDULE

| PROJECT | 2022 | | | | | | | | 2023 | | | | | | | |
|----------------------------|------|-----|-----|-----|-----|-----|-----|-----|------|-----|-----|-----|-----|-----|-----|-----|
| | MAY | JUN | JUL | AUG | SEP | OCT | NOV | DEC | JAN | FEB | MAR | APR | MAY | JUN | JUL | AUG |
| 4675-Security-PKG1 FY18-19 | ★ | | | | | | | | | | | | | | | |
| 5025-Security-PKG2-FY19 | ★ | | | | | | | | | | | | | | | |

Baseline

Planning

Design

Construction



2017 H&S: Water Quality



Health & Safety: Water Quality
May 2022

PPS Team Lead: Steve Varblow
Number of Completed Projects: 6
Number of Active Projects: 16

STATUS AT A GLANCE

Legend:

| | |
|--|-----------------------------|
| | As planned: no concerns |
| | Caution: requires attention |
| | Impacts: impacts occurring |

| | As Planned | Caution | Impacts |
|----------|------------|---------|---------|
| Budget | X | | |
| Equity | X | | |
| Schedule | | | X |
| Overall | | | X |

BUDGET

| | BUDGET | | FUNDING | | PROGRESS | | FORECAST | |
|------------------------------------|-----------------|-------------------|-------------------|------------------|-----------------------------|-----------------------|------------------------|---------------------|
| | Original Budget | Current Budget | Water Funds | Other Funds | Actuals To Date (all funds) | Additional Encumbered | Estimate At Completion | Over/Under |
| Unallocated Funds | 28,492,000 | 10,247,556 | 10,247,556 | - | - | - | - | (10,247,556) |
| Lead In Water-Emerg Resp - 4241 | - | 4,810,451 | 311,867 | 4,498,584 | 4,350,597 | 212,913 | 4,810,451 | - |
| Lead In Water Repairs - 4517 | - | 7,129,461 | 7,120,756 | 8,705 | 3,124,130 | 808,304 | 7,129,461 | - |
| Drink Fixt - Bid Package 31 - 5301 | - | 349,125 | 349,125 | - | 277,770 | 2,360 | 277,770 | (71,355) |
| Drink Fixt - Bid Package 32 - 5397 | - | 342,136 | 342,136 | - | 220,344 | 37,288 | 306,632 | (35,504) |
| Drink Fixt - Bid Package 33 - 5398 | - | 283,173 | 283,173 | - | 273,218 | 7,406 | 283,173 | - |
| Drink Fixt - Bid Package 34 - 5390 | - | 354,142 | 354,142 | - | 322,269 | 9,032 | 354,142 | - |
| Drink Fixt - Bid Package 35 - 5391 | - | 355,960 | 355,960 | - | 346,367 | - | 355,960 | - |
| Drink Fixt - Bid Package 36 - 5452 | - | 363,074 | 363,074 | - | 307,818 | 38,384 | 363,074 | - |
| Drink Fixt - Bid Package 37 - 5453 | - | 357,963 | 357,963 | - | 337,885 | 27,352 | 365,238 | 7,275 |
| Drink Fixt - Bid Package 38 - 5477 | - | 384,456 | 384,456 | - | 291,605 | 58,250 | 384,456 | - |
| Drink Fixt - Bid Package 39 - 5478 | - | 326,040 | 326,040 | - | 309,196 | 6,515 | 326,040 | - |
| Drink Fixt - Bid Package 40 - 5540 | - | 326,040 | 326,040 | - | 296,696 | - | 326,040 | - |
| Drink Fixt - Bid Package 41 - 5541 | - | 484,440 | 484,440 | - | 443,614 | - | 484,440 | - |
| Drink Fixt - Bid Package 42 - 5542 | - | 464,072 | 464,072 | - | 163,240 | 259,066 | 464,072 | - |
| Drink Fixt - Bid Package 43 - 5640 | - | 386,229 | 386,229 | - | 298,944 | 52,524 | 386,229 | - |
| Drink Fixt - Bid Package 44 - 4651 | - | 324,442 | 324,442 | - | 195,863 | 99,379 | 324,442 | - |
| Drink Fixt - Bid Package 45 - 5642 | - | 430,011 | 430,011 | - | 14,158 | 377,152 | 430,011 | - |
| Drink Fixt - Bid Package 46 - 5741 | - | 383,900 | 383,900 | - | 18,160 | 330,840 | 383,900 | - |
| Drink Fixt - Bid Package 47 - 5742 | - | 331,955 | 331,955 | - | 302 | 301,777 | 331,955 | - |
| Drink Fixt - Bid Package 48 - 5743 | - | 409,860 | 409,860 | - | 371,573 | 1,400 | 409,860 | - |
| Drink Fixt - Bid Package 49 - 5744 | - | 144,426 | 144,426 | - | 9,026 | 122,270 | 144,426 | - |
| Drink Fixt - Bid Package 50 - 5866 | - | 467,060 | 467,060 | - | - | 424,600 | 467,060 | - |
| Water Quality Totals | | 29,455,970 | 24,948,682 | 4,507,288 | 11,972,775 | 3,176,812 | 19,108,830 | (10,347,141) |



2017 H&S: Water Quality



Health & Safety: Water Quality
May 2022

PPS Team Lead: Steve Varblow
Number of Completed Projects: 6
Number of Active Projects: 16

EQUITY *Percent of payments made to Certified owned businesses, percent of labor hours of apprenticeable trades; cumulative*

| | MBE | WBE | SDVBE | ESB | N-C | TOTAL | goal | MIN | goal | FEM | goal | APPR | req |
|-------------|-------|--------|-------|--------|-------|--------|------|-----|------|-----|------|------|-----|
| Consultants | 0.00% | 62.82% | 0.00% | 13.49% | 0.00% | 76.30% | 18% | | | | | | |
| Contractors | 0.00% | 0.00% | 0.00% | 33.40% | 0.00% | 33.40% | 18% | | | | | | |
| Overall | 0.00% | 5.01% | 0.00% | 31.81% | 0.00% | 36.82% | 18% | | | | | | |
| Workforce | | | | | | | | 5% | 25% | 13% | 14% | 12% | 20% |

SCHEDULE

| PROJECT | 2022 | | | | | | | | 2023 | | | | | | | |
|------------------------------------|------|-----|-----|-----|-----|-----|-----|-----|------|-----|-----|-----|-----|-----|-----|-----|
| | MAY | JUN | JUL | AUG | SEP | OCT | NOV | DEC | JAN | FEB | MAR | APR | MAY | JUN | JUL | AUG |
| Lead In Water Repairs - 4517 | ★ | | | | | | | | | | | | | | | |
| Drink Fixt - Bid Package 32 - 5397 | ★ | | | | | | | | | | | | | | | |
| Drink Fixt - Bid Package 33 - 5398 | ★ | | | | | | | | | | | | | | | |
| Drink Fixt - Bid Package 34 - 5390 | ★ | | | | | | | | | | | | | | | |
| Drink Fixt - Bid Package 35 - 5391 | ★ | | | | | | | | | | | | | | | |
| Drink Fixt - Bid Package 36 - 5452 | ★ | | | | | | | | | | | | | | | |
| Drink Fixt - Bid Package 37 - 5453 | ★ | | | | | | | | | | | | | | | |
| Drink Fixt - Bid Package 38 - 5477 | ★ | | | | | | | | | | | | | | | |
| Drink Fixt - Bid Package 39 - 5478 | ★ | | | | | | | | | | | | | | | |
| Drink Fixt - Bid Package 40 - 5540 | ★ | | | | | | | | | | | | | | | |
| Drink Fixt - Bid Package 41 - 5541 | ★ | | | | | | | | | | | | | | | |
| Drink Fixt - Bid Package 42 - 5542 | ★ | | | | | | | | | | | | | | | |
| Drink Fixt - Bid Package 43 - 5640 | ★ | | | | | | | | | | | | | | | |
| Drink Fixt - Bid Package 44 - 4651 | ★ | | | | | | | | | | | | | | | |
| Drink Fixt - Bid Package 45 - 5642 | ★ | | | | | | | | | | | | | | | |
| Drink Fixt - Bid Package 46 | ★ | | | | | | | | | | | | | | | |
| Drink Fixt - Bid Package 47 | ★ | | | | | | | | | | | | | | | |
| Drink Fixt - Bid Package 48 | ★ | | | | | | | | | | | | | | | |
| Drink Fixt - Bid Package 49 | ★ | | | | | | | | | | | | | | | |
| Drink Fixt - Bid Package 50 | ★ | | | | | | | | | | | | | | | |

Baseline

Planning

Design

Construction



Overview of Project Oversight

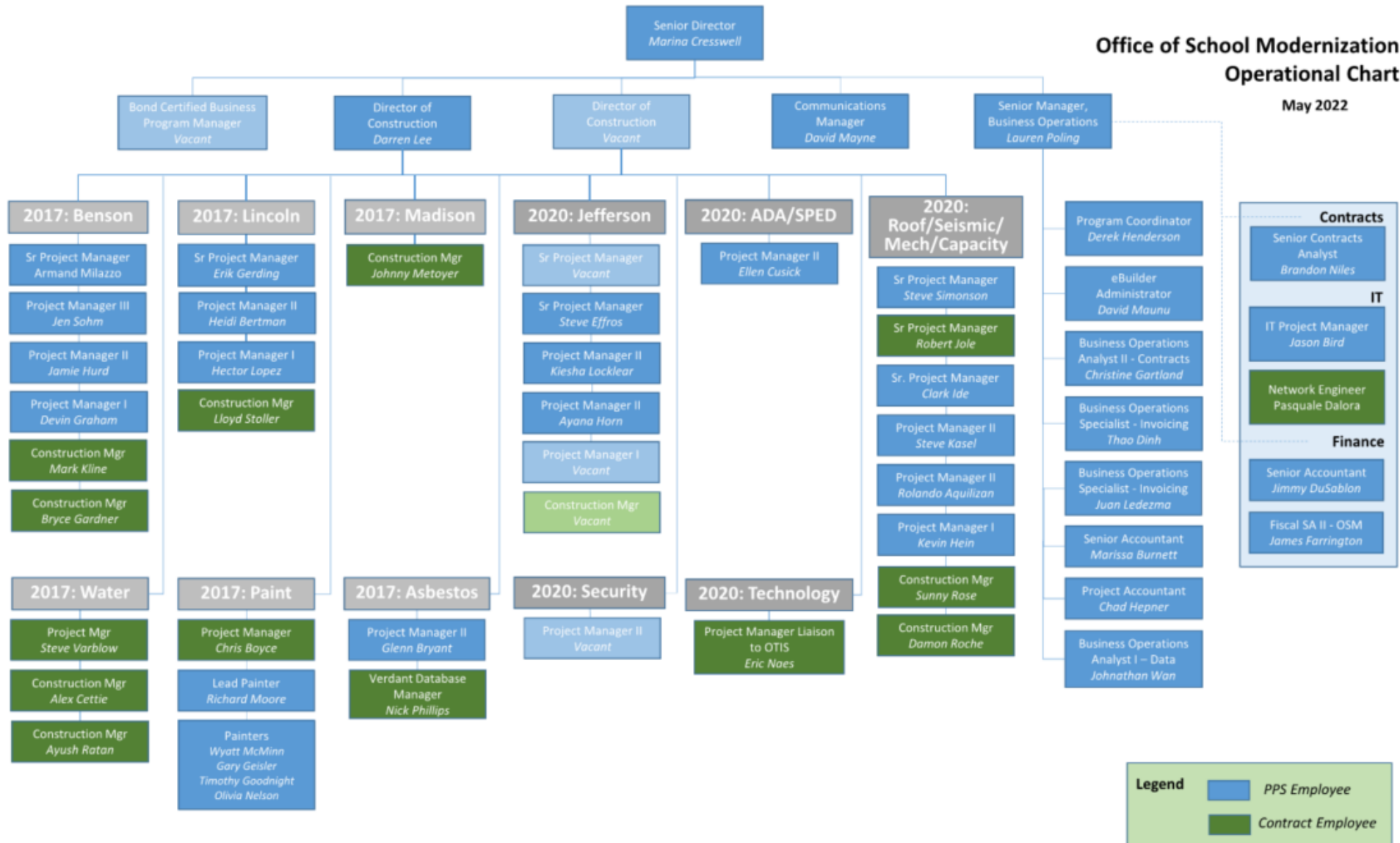


SCHOOL BUILDING IMPROVEMENT BOND



Office of School Modernization Operational Chart

May 2022





Project Oversight

Daily

- eBuilder processes (see next slide)
- PCard charges

Weekly

- Weekly project team check-ins

Monthly

- Monthly project review meetings
- Project Status Updates (eBuilder)

Per Occurrence

- Request for Development - requesting initiation of a procurement process
- Recommendation to Award – recommending award of a contract
- Budget increase requests – requesting additional budget (typically on H&S or Infrastructure programs)
- Design Phase Approvals – requesting approval to move to next design phase, providing documents that show scope, schedule and budget are in alignment



eBuilder Processes

Invoice approvals (IA) –

Applies to: All invoices and journal entries

Approval: By financial limits of authority (FLOA)

Commitment approvals (CA) –

Applies to: All new contracts

Approval: Up to and including Senior Director

Change requests (CR-PM, CR-VI) –

Applies to: All change requests to contracts

Approval: By FLOA for >\$0, or by Senior Director for \$0 terms and conditions

GMP change amendments (GMP-CA) –

Applies to: Changes to allocation of funds within GMP (typically use of contingency)

Approval: By FLOA

Owner Directive Authorization (ODA) –

Applies to: Direction to contractor to proceed with specified scope of work on a Time & Materials Not To Exceed basis, typically while continuing to negotiate a final lump sum cost

Approval: By FLOA



Project Status Update (PSU) and Monthly Project Meeting:

PSU process is filled out monthly in eBuilder per project and submitted through an approval process (highest level of required approval is Director of Construction, with notification to Senior Director when completed).

The PSU process is an extensive summary of pertinent information, and there is also a list of mandatory documents that must be attached to the process. These include the following types of documents: site safety plans; stakeholder engagement plans; cost forecasts; risk registers; project budget analysis; Project Management Plan; value engineering log; area program summary; schedule; as well as other relevant documents.

Information is reviewed during the monthly meeting.

The monthly meeting includes all OSM project team members for the project, OSM financial analysts, contracts analyst, Communications Manager, Director of Construction, and Senior Director.

In addition to the PSU information, information is provided regarding outstanding encumbrances by vendor; cash flow forecasting and comparison to actuals; and a report on status of eBuilder processes for the project (typically including overall duration in progress, current step, how long in current step).



Adjourn

**Next meeting:
July 27, 2022
5:30 pm**

2017 Health & Safety Funding Allocation
May 2022

| | Total Funds | Spent To Date | Balance | Unalloc Balance |
|--|-------------------|------------------|------------------|----------------------|
| Bond Fund Category: DS001 - Accessibility | 9,200,000 | 8,944,398 | 255,602 | Accessibility |
| <i>Project Name: 2017 Bond Program</i> | 47,361 | - | 47,361 | 47,361 |
| Project Name: GROUP 3 (IP 2017) | 3,593,412 | 3,417,799 | 175,613 | |
| Project Name: Harrison Park - Partial Re-Roof-Bond - 5321 - FY20 | 45,000 | 45,000 | - | |
| Project Name: Multiple Sites - 2018-2019 Middle School Conversions - 4586-FY18 | 4,411,028 | 4,378,400 | 32,628 | |
| Project Name: Ockley Green - Partial Re-Roof-Bond - 5322 - FY20 | 45,000 | 45,000 | - | |
| Project Name: Rigler - Health & Safety Improvements-Bond - 5029 - FY19 | 1,013,199 | 1,013,199 | 0 | |
| Project Name: Woodlawn - Partial Re-Roof-Bond - 5323 - FY20 | 45,000 | 45,000 | - | |
| Bond Fund Category: DS002 - Asbestos Remediation | 11,040,000 | 5,658,823 | 5,381,177 | Asbestos |
| <i>Project Name: 2017 Bond Program</i> | 3,000,753 | - | 3,000,753 | 3,000,753 |
| Project Name: Beaumont - 2020 Asbestos Abatement-Bond - 5373 - FY20 | 169,985 | 169,985 | - | |
| Project Name: Capitol Hill - 2020 Asbestos Abatement-Bond - 5275 - FY20 | 93,134 | 93,134 | - | |
| Project Name: Chapman - 2020 Asbestos Abatement-Bond - 5377 - FY20 | 89,983 | 89,983 | - | |
| Project Name: Gray - Asbestos Abatement- Bond - FY22 - 5947 - 5947 | 53,350 | - | 53,350 | |
| Project Name: Gray - 2021 Asbestos Abatement-Bond - 5673 | 123,025 | 123,025 | - | |
| Project Name: GROUP 3 (IP 2017) | 66,361 | 66,361 | - | |
| Project Name: GROUP 4 - ASBESTOS | 1,392,403 | 1,392,403 | - | |
| Project Name: Harrison Park - Asbestos Abatement - Bond - 5946 - FY22 | 36,087 | - | 36,087 | |
| Project Name: Harrison Park - Copy Room-Abate Asbestos Tile - 4664 - FY18 | 10,185 | 10,185 | - | |
| Project Name: Harrison Park - K Classrooms-Abate Asbestos from floor tiles - 4441 - FY18 | 24,009 | 24,009 | - | |
| Project Name: Hosford - 2020 Asbestos Abatement-Bond - 5363 - FY20 | 199,986 | 199,986 | - | |
| Project Name: Hosford - 2021 Asbestos Abatement-Bond - 5671 | 77,262 | 77,262 | - | |
| Project Name: Hosford - Wood Shop Floor-Asbestos - 4573 - FY18 | 41,523 | 41,523 | - | |
| Project Name: Jackson - Health & Safety Improvements-Bond - 5030 - FY19 | - | - | - | |
| Project Name: Jefferson - 2021 Asbestos Abatement-Bond - 5672 | 34,738 | 34,738 | - | |
| Project Name: King - 2022 Asbestos Abatement - Bond - 5949 - FY22 | 884,213 | - | 884,213 | |
| Project Name: Lane - 2020 Asbestos Abatement-Bond - 5361 - FY20 | 89,849 | 89,849 | - | |
| Project Name: Multiple Sites - 2018-2019 Middle School Conversions - 4586-FY18 | 658,511 | 638,502 | 20,009 | |
| Project Name: Multiple Sites - Asbestos Bond Projects-2018-19 - 4923 - FY19 | 1,254,069 | 1,254,069 | - | |
| Project Name: Multiple Sites - Asbestos Bond Projects-2019-20 - 4924 - FY20 | 45,128 | 45,128 | - | |
| Project Name: Multiple Sites - Asbestos Bond Projects-2020-21 - 4925 - FY21 | 233,410 | 123,717 | 109,694 | |
| Project Name: Multiple Sites - Asbestos Bond Projects-2021-22 - 5826 - FY22 | 113,192 | 53,216 | 59,976 | |
| Project Name: Multiple Sites - Floor Replacement-Bond Compensible - 4565 - FY18 | 101,044 | 101,044 | - | |
| Project Name: Rigler - 2020 Asbestos Abatement-Bond - 5369 - FY20 | 177,837 | 177,837 | - | |
| Project Name: Stephenson - 2020 Asbestos Abatement-Bond - 5362 - FY20 | 150,288 | 150,288 | - | |
| Project Name: Stephenson - 2022 Asbestos Abatement - Bond - 5950 - FY22 | 237,930 | - | 237,930 | |
| Project Name: Vernon - 2020 Asbestos Abatement-Bond - 5374 - FY20 | 74,708 | 74,708 | - | |
| Project Name: Vernon - 2021 Asbestos Abatement-Bond - 5675 | 84,981 | 84,981 | - | |
| Project Name: Vestal - 2020 Asbestos Abatement-Bond - 5367 - FY20 | 181,485 | 181,485 | - | |
| Project Name: Winterhaven - 2021 Asbestos Abatement-Bond - 5676 | 160,383 | 160,383 | - | |
| Project Name: Winterhaven - 2022 Asbestos Abatement - Bond - 5951 - FY22 | 569,965 | - | 569,965 | |
| Project Name: Woodstock - 2020 Asbestos Abatement-Bond - 5368 - FY20 | 192,408 | 192,408 | - | |

2017 Health & Safety Funding Allocation
May 2022

| | Total Funds | Spent To Date | Balance | Unalloc Balance |
|---|-------------------|-------------------|-------------------|--------------------------|
| Project Name: Woodstock - 2022 Asbestos Abatement - Bond - 5952 - FY22 | 409,200 | - | 409,200 | |
| Project Name: Woodstock - Hallway-Abate and replace floor tiles - 4738 - FY18 | 8,614 | 8,614 | - | |
| Bond Fund Category: DS003 - Fire Sprinkler/Alarms | 19,564,225 | 17,794,649 | 1,769,576 | Fire Sprink/Alarm |
| <i>Project Name: 2017 Bond Program</i> | <i>1,768,850</i> | <i>-</i> | <i>1,768,850</i> | <i>1,768,850</i> |
| Project Name: Chapman - Re-Roof - Bond Funded - 4671 - FY18 | - | - | - | |
| Project Name: GROUP 2 - Fire Alarm / Sprinkler | 4,048,504 | 4,048,504 | - | |
| Project Name: GROUP 3 (IP 2017) | 4,361,785 | 4,361,060 | 725 | |
| Project Name: Jefferson - Fire Sprinkler Upgrades-Bond - 5053 - FY19 | 1,139,496 | 1,139,496 | - | |
| Project Name: Multiple Sites - Fire Alarm Equipment Purchase - FY15/16/17/18 - X0114 | 46,523 | 46,523 | - | |
| Project Name: Multiple Sites - Fire Alarm Upgrades-North Group 1 - 5211 - FY20 | 1,780,913 | 1,780,913 | - | |
| Project Name: Multiple Sites - Fire Alarm Upgrades-North Group 2 - 5212 - FY20 | 1,844,959 | 1,844,959 | - | |
| Project Name: Multiple Sites - Fire Alarm Upgrades-South Group 3 - 5213 - FY20 | 1,384,827 | 1,384,827 | - | |
| Project Name: Multiple Sites - Fire Alarm Upgrades-South Group 4 - 5214 - FY20 | 1,703,198 | 1,703,198 | - | |
| Project Name: Rigler - Health & Safety Improvements-Bond - 5029 - FY19 | 1,485,169 | 1,485,169 | - | |
| Bond Fund Category: DS004 - Lead Paint Stabilization | 14,624,624 | 2,523,332 | 12,101,292 | Lead Paint |
| <i>Project Name: 2017 Bond Program</i> | <i>3,790,587</i> | <i>-</i> | <i>3,790,587</i> | <i>3,790,587</i> |
| Project Name: Multiple Sites - Lead Paint Abatement - BOND - 5466 | 4,000,000 | 1,477,386 | 2,522,614 | |
| Project Name: Multiple Sites - Lead Paint Abatement - Emergency Declaration - 4284 - FY17 | 395,243 | 395,243 | - | |
| Project Name: Multiple Sites - Lead Paint Abatement - Fund 423 - 4493 -FY17 | 438,795 | 438,795 | - | |
| Project Name: Multiple Sites - Lead Painting-Bond-ASA - 5550 | 1,500,000 | - | 1,500,000 | |
| Project Name: Multiple Sites - Lead Painting-Bond-First Cascade - 5552 | 1,500,000 | 200,400 | 1,299,600 | |
| Project Name: Multiple Sites - Lead Painting-Bond-Fulcrum - 5551 | 1,500,000 | - | 1,500,000 | |
| Project Name: Multiple Sites - Lead Painting-Bond-PaclndPaint - 5495 - FY21 | 1,500,000 | 11,509 | 1,488,491 | |
| Bond Fund Category: DS005 - Radon Mitigation | 1,036,035 | 158,713 | 877,322 | Radon |
| <i>Project Name: 2017 Bond Program</i> | <i>877,322</i> | <i>-</i> | <i>877,322</i> | <i>877,322</i> |
| Project Name: Lent - Radon Mitigation - 4344 - FY17 | 38,938 | 38,938 | - | |
| Project Name: Marysville - Radon Mitigation-Rms 137-138-139 - 4939 - FY20 | 8,901 | 8,901 | - | |
| Project Name: Multiple Sites - Radon Mitigation - 4609 - FY18 | 110,875 | 110,875 | - | |
| Bond Fund Category: DS006 - Roof Improvements | 52,986,434 | 52,393,425 | 3,870,788 | Roof |
| <i>Project Name: 2017 Bond Program</i> | <i>3,047,111</i> | <i>-</i> | <i>3,047,111</i> | <i>3,047,111</i> |
| Project Name: Chapman - Re-Roof - Bond Funded - 4671 - FY18 | 3,987,307 | 3,987,307 | - | |
| Project Name: Duniway - Re-Roof-Bond Funded - 5420 - FY21 | 938,007 | 460,677 | 477,330 | |
| Project Name: GROUP 3 (IP 2017) | 10,648,856 | 10,521,969 | 126,887 | |
| Project Name: Harrison Park - Partial Re-Roof-Bond - 5321 - FY20 | 2,680,274 | 2,680,274 | - | |
| Project Name: Hayhurst - SRGP-Bond - 5028 - FY19 | 2,076,977 | 2,076,977 | - | |
| Project Name: Jackson - Health & Safety Improvements-Bond - 5030 - FY19 | 3,972,722 | 3,968,943 | 3,779 | |
| Project Name: Kelly - Partial Re-Roof-Bond - 5319 - FY20 | 1,649,098 | 1,649,098 | - | |
| Project Name: Lee - Roof Repair - 4497 - FY18 | 96,750 | 96,750 | - | |
| Project Name: MLC - Re-Roof-Bond Funded - 5422 - FY21 | 659,699 | 546,841 | 112,858 | |
| Project Name: Mt Tabor - Partial Re-Roof-Bond - 5320 - FY20 | 3,022,689 | 3,022,689 | - | |
| Project Name: Multiple Sites - 2018-2019 Middle School Conversions - 4586-FY18 | 3,781,759 | 3,781,759 | - | |
| Project Name: Multiple Sites - Health & Safety Group 1 Design - 5153 - FY20 | 751,521 | 751,521 | - | |

2017 Health & Safety Funding Allocation
May 2022

| | Total Funds | Spent To Date | Balance | Unalloc Balance |
|--|-------------------|------------------|-------------------|-------------------|
| Project Name: Multiple Sites - Health & Safety Group 2 Design - 5154 - FY20 | 1,146,401 | 1,146,401 | - | |
| Project Name: Ockley Green - Partial Re-Roof-Bond - 5322 - FY20 | 1,871,486 | 1,871,486 | - | |
| Project Name: Rieke - Re-Roof-Bond Funded - 5423 - FY21 | 367,693 | 266,871 | 100,822 | |
| Project Name: Rigler - Health & Safety Improvements-Bond - 5029 - FY19 | 7,173,566 | 7,173,566 | - | |
| Project Name: Sitton - Health & Safety Improvements-Bond - 5027 - FY19 | 3,468,883 | 6,744,662 | 2,000 | |
| Project Name: Tubman - Roof Repairs- 4584 - OSM - FY18 | - | - | - | |
| Project Name: Woodlawn - Partial Re-Roof-Bond - 5323 - FY20 | 1,645,634 | 1,645,634 | - | |
| Bond Fund Category: DS007 - Security Improvements | 9,322,221 | 7,449,508 | 1,872,713 | Security |
| <i>Project Name: 2017 Bond Program</i> | <i>716,103</i> | <i>-</i> | <i>716,103</i> | <i>716,103</i> |
| Project Name: Benson HS Modernization - Kenton Swing Site-Mult Pathways - 5013 | 69,646 | - | 69,646 | |
| Project Name: Creative Science - ADA Accommodation-Access Control - 5049 - FY20 | 12,855 | 12,855 | - | |
| Project Name: Jefferson - Camera-Pull Stations - 4528 - FY17 | 30,859 | 30,859 | - | |
| Project Name: Multi-2018-4675-Bond-Security-PKG1 FY18-19 | 2,512,541 | 1,834,984 | 677,557 | |
| Project Name: Multi-2018-5025-Bond-Security-PKG2-FY19 | 2,419,821 | 2,048,635 | 371,186 | |
| Project Name: Multi-2018-5026-Bond-Security-PKG3-FY19 | 3,256,981 | 3,256,981 | - | |
| Project Name: Multiple Sites - 2018-2019 Middle School Conversions - 4586-FY18 | 303,414 | 265,194 | 38,220 | |
| Bond Fund Category: DS008 - Water | 24,948,682 | 7,718,679 | 17,230,002 | Water |
| <i>Project Name: 2017 Bond Program</i> | <i>10,247,556</i> | <i>-</i> | <i>10,247,556</i> | <i>10,247,556</i> |
| Project Name: Multiple Sites - Day CPM Management Services - 4610 - FY18 | - | - | - | |
| Project Name: Multiple Sites - Drinking Fixture Replacement Program-Bid Package 31 - 5301 - FY20 | 349,125 | 277,770 | 71,355 | |
| Project Name: Multiple Sites - Drinking Fixture Replacemnt Prog-Bid Package 32 - 5397 - FY20 | 342,136 | 220,344 | 121,792 | |
| Project Name: Multiple Sites - Drinking Fixture Replacemnt Prog-Bid Package 33 - 5398 - FY20 | 283,173 | 273,218 | 9,955 | |
| Project Name: Multiple Sites - Drinking Fixture Replacemnt Prog-Bid Pkg 34 - 5390 - FY21 | 354,142 | 322,269 | 31,873 | |
| Project Name: Multiple Sites - Drinking Fixture Replacemnt Prog-Bid Pkg 35 - 5391 - FY21 | 355,960 | 346,367 | 9,593 | |
| Project Name: Multiple Sites - Drinking Fixture Replacemnt Prog-Bid Pkg 36 - 5452 - FY21 | 363,074 | 307,818 | 55,255 | |
| Project Name: Multiple Sites - Drinking Fixture Replacemnt Prog-Bid Pkg 37 - 5453 - FY21 | 357,963 | 337,885 | 20,078 | |
| Project Name: Multiple Sites - Drinking Fixture Replacemnt Prog-Bid Pkg 38 - 5477 - FY21 | 384,456 | 291,605 | 92,851 | |
| Project Name: Multiple Sites - Drinking Fixture Replacemnt Prog-Bid Pkg 39 - 5478 - FY21 | 326,040 | 309,196 | 16,844 | |
| Project Name: Multiple Sites - Drinking Fixture Replacemnt Prog-Bid Pkg 40 - 5540 - FY21 | 326,040 | 296,696 | 29,344 | |
| Project Name: Multiple Sites - Drinking Fixture Replacemnt Prog-Bid Pkg 41 - 5541 | 484,440 | 443,614 | 40,826 | |
| Project Name: Multiple Sites - Drinking Fixture Replacemnt Prog-Bid Pkg 42 - 5542 | 464,072 | 163,240 | 300,832 | |
| Project Name: Multiple Sites - Drinking Fixture Replacemnt Prog-Bid Pkg 43 - 5640 | 386,229 | 298,944 | 87,285 | |
| Project Name: Multiple Sites - Drinking Fixture Replacemnt Prog-Bid Pkg 44 - 5641 | 324,442 | 195,863 | 128,579 | |
| Project Name: Multiple Sites - Drinking Fixture Replacemnt Prog-Bid Pkg 45 - 5642 | 430,011 | 14,158 | 415,853 | |
| Project Name: Multiple Sites - Drinking Fixture Replacemnt Prog-Bid Pkg 46 - 5741 | 383,900 | 18,160 | 365,740 | |
| Project Name: Multiple Sites - Drinking Fixture Replacemnt Prog-Bid Pkg 47 - 5742 | 331,955 | 302 | 331,653 | |
| Project Name: Multiple Sites - Drinking Fixture Replacemnt Prog-Bid Pkg 48 - 5743 | 409,860 | 371,573 | 38,287 | |
| Project Name: Multiple Sites - Drinking Fixture Replacemnt Prog-Bid Pkg 49 - 5744 | 144,426 | 9,026 | 135,400 | |
| Project Name: Multiple Sites - Drinking Fixture Replacemnt Prog-Bid Pkg 50 - 5866 - FY22 | 467,060 | - | 467,060 | |
| Project Name: Multiple Sites - Lead in Water Repairs - 4517 - FY17 | 7,120,756 | 3,115,425 | 4,005,331 | |
| Project Name: Multiple Sites - Lead in Water-Emergency Response - 4241 - FY16 | 311,867 | 105,205 | 206,661 | |

| | Total Funds | Spent To Date | Balance | Unalloc Balance |
|--|--------------------|--------------------|-------------------|----------------------------|
| Bond Fund Category: Management Costs | 12,000,000 | 10,861,956 | 1,138,044 | |
| <i>Project Name: 2017 Bond Program</i> | 11,937,608 | 10,811,732 | 1,125,876 | |
| Project Name: Multiple Sites - Day CPM Management Services - 4610 - FY18 | - | - | - | |
| Project Name: Creative Science - SRGP Design - 5457 - FY21 | 34,852 | 22,684 | 12,168 | |
| Project Name: Lent - SRGP Design - 5194 - FY20 | 27,540 | 27,540 | - | |
| Bond Fund Category: OSCIM | 3,277,779 | - | 3,277,779 | OSCIM |
| <i>Project Name: 2017 Bond Program</i> | - | - | - | |
| Project Name: Sitton - Health & Safety Improvements-Bond - 5027 - FY19 | 3,277,779 | - | 3,277,779 | |
| Bond Fund Category: H&S Unallocated | - | - | - | H&S Unallocated |
| <i>Project Name: 2017 Bond Program</i> | - | - | - | |
| | 158,000,000 | 113,503,484 | 47,774,295 | 23,495,644 |

Health & Safety: Asbestos Remediation

May 2022

PPS Team Lead: Glenn Bryant

Number of Completed Projects: 25

Number of Active Projects: 8

STATUS AT A GLANCE

Legend:

| | |
|--|-----------------------------|
| | As planned: no concerns |
| | Caution: requires attention |
| | Impacts: impacts occurring |

| | As Planned | Caution | Impacts |
|----------|------------|---------|---------|
| Budget | X | | |
| Equity | X | | |
| Schedule | X | | |
| Overall | X | | |

BUDGET

| | BUDGET | | FUNDING | | PROGRESS | | FORECAST | |
|------------------------------------|-----------------|-------------------|----------------|-------------|--------------------------------|--------------------------|---------------------------|-------------|
| | Original Budget | Current Budget | Asbestos Funds | Other Funds | Actuals To Date (all funds) | Additional Encumbered | Estimate At Completion | Over/Under |
| Unallocated Funds | 12,000,000 | 3,000,753 | 3,000,753 | - | - | - | - | (3,000,753) |
| Beaumont - 5373 - FY20 | - | 169,985 | 169,985 | - | 169,985 | - | 169,985 | - |
| Capitol Hill - 5275 - FY20 | - | 93,134 | 93,134 | - | 93,134 | - | 93,134 | - |
| Chapman - 5377 - FY20 | - | 89,983 | 89,983 | - | 89,983 | - | 89,983 | - |
| Gray 2021 - 5673 - FY21 | - | 123,025 | 123,025 | - | 123,025 | - | 123,025 | - |
| Gray 2022 - 5947 - FY22 | - | 53,350 | 53,350 | - | - | - | 53,350 | - |
| GROUP 3 (IP 2017) | - | 66,361 | 66,361 | - | 66,361 | - | 66,361 | - |
| GROUP 4 - ASBESTOS | - | 1,392,403 | 1,392,403 | - | 1,392,403 | - | 1,392,403 | - |
| Harrison Park - Copy - 4664 - FY18 | - | 10,185 | 10,185 | - | 10,185 | - | 10,185 | - |
| Harrison Park - K - 4441 - FY18 | - | 24,009 | 24,009 | - | 24,009 | - | 24,009 | - |
| Harrison Park 2022 - 5946 - FY22 | - | 36,087 | 36,087 | - | - | 8,820 | 36,087 | - |
| Hosford 2020 - 5363 - FY20 | - | 199,986 | 199,986 | - | 199,986 | - | 199,986 | - |
| Hosford 2021 - 5671 - FY21 | - | 77,262 | 77,262 | - | 77,262 | - | 77,262 | - |
| Hosford Wood Shop- 4573 - FY18 | - | 41,523 | 41,523 | - | 41,523 | - | 41,523 | - |
| Jefferson 2021 - 5361 - FY21 | - | 34,738 | 34,738 | - | 34,738 | - | 34,738 | - |
| King 2022 - 5949 - FY22 | - | 884,213 | 884,213 | - | - | - | 884,213 | - |
| Lane - 5361 - FY20 | - | 89,849 | 89,849 | - | 89,849 | - | 89,849 | - |
| Middle School Conv - 4586-FY18 | - | 32,540,735 | 658,511 | 31,882,224 | 32,326,731 | - | 32,540,735 | - |
| Asbestos Bond Projs - 4923 - FY19 | - | 1,254,069 | 1,254,069 | - | 1,254,069 | - | 1,254,069 | - |
| Asbestos Bond Projs - 4924 - FY20 | - | 45,128 | 45,128 | - | 45,128 | - | 45,128 | - |
| Asbestos Bond Projs - 4925 - FY21 | - | 233,410 | 233,410 | - | 123,717 | 47,958 | 233,410 | - |
| Asbestos Bond Projs - 5826 - FY22 | - | 113,192 | 113,192 | - | 53,216 | 52,474 | 113,192 | - |
| Floor Replacement- 4565 - FY18 | - | 101,044 | 101,044 | - | 101,044 | - | 101,044 | - |

Health & Safety: Asbestos Remediation

May 2022

PPS Team Lead: Glenn Bryant

Number of Completed Projects: 25

Number of Active Projects: 8

| | | | | | | | | |
|--------------------------------|---|-------------------|-------------------|-------------------|-------------------|----------------|-------------------|--------------------|
| Rigler - 5369 - FY20 | - | 177,837 | 177,837 | - | 177,837 | - | 177,837 | - |
| Stephenson - 5362 - FY20 | - | 150,288 | 150,288 | - | 150,288 | - | 150,288 | - |
| Stephenson 2022 - 5950 - FY22 | | 237,930 | 237,930 | - | - | - | 237,930 | |
| Vernon 2020 - 5374 - FY20 | - | 74,708 | 74,708 | - | 74,708 | - | 74,708 | - |
| Vernon 2021 - 5675 - FY20 | - | 84,981 | 84,981 | - | 84,751 | - | 84,981 | - |
| Vestal - 5367 - FY20 | - | 181,485 | 181,485 | - | 181,485 | - | 181,485 | - |
| Winterhaven - 5676 - FY20 | - | 160,383 | 160,383 | - | 160,133 | - | 160,383 | - |
| Winterhaven 2022 - 5951 - FY22 | - | 569,965 | 569,965 | - | - | - | 569,965 | - |
| Woodstock - 5368 - FY20 | - | 192,408 | 192,408 | - | 192,408 | - | 192,408 | - |
| Woodstock - Hall - 4738 - FY18 | - | 8,614 | 8,614 | - | 8,614 | - | 8,614 | - |
| Woodstock 2022 - 5952 - FY22 | - | 409,200 | 409,200 | - | - | - | 409,200 | - |
| Asbestos Totals | | 42,922,224 | 11,040,000 | 31,882,224 | 37,346,572 | 109,252 | 39,921,471 | (3,000,753) |

EQUITY* *Percent of payments made to Certified owned businesses, percent of labor hours of apprenticeable trades; cumulative*

| | MBE | WBE | SDVBE | ESB | N-C | TOTAL | goal | MIN | goal | FEM | goal | APPR | req |
|-------------|--------|-------|-------|-------|-------|--------|------|-----|------|-----|------|------|-----|
| Consultants | 21.12% | 2.35% | 0.00% | 0.00% | 8.07% | 31.54% | 18% | | | | | | |
| Contractors | 42.45% | 0.00% | 0.00% | 0.00% | 0.00% | 42.45% | 18% | | | | | | |
| Overall | 37.58% | 0.54% | 0.00% | 0.00% | 1.84% | 39.96% | 18% | | | | | | |
| Workforce* | | | | | | | | N/A | 25% | N/A | 14% | N/A | 20% |

*Workforce Equity requirements are only applied to Public Improvement (construction) contracts over \$200,000. There is currently no data to report.

SCHEDULE

| PROJECT | 2022 | | | | | | | | 2023 | | | | | | | |
|-------------------------------|------|-----|-----|-----|-----|-----|-----|-----|------|-----|-----|-----|-----|-----|-----|-----|
| | MAY | JUN | JUL | AUG | SEP | OCT | NOV | DEC | JAN | FEB | MAR | APR | MAY | JUN | JUL | AUG |
| 2022 summer projects | ★ | | | | | | | | | | | | | | | |
| upcoming 2023 summer projects | ★ | | | | | | | | | | | | | | | |

Baseline

 Planning
 Design
 Construction

PROJECT NOTES

Progress:

- Six schools have been selected for 2022 abatement and are in the final stages of procurement.
- Project design for 2023 projects is pending and will commence once 2022 abatement projects are successfully contracted.

Accomplishments:

- 22 sites have had mitigation performed, some in phased approaches to allow for completion over summer breaks.
- Multiple surveys have been conducted and will allow for the early start of design, procurement and scheduling for the 2023 work.
- Projects will continue to be performed until all asbestos mitigation funds are utilized.

Risks:

- Asbestos abatement and other related services can only be conducted during school break periods when school is closed. This is approximately 10 weeks during the summer break when the majority of work is performed.
- Unforeseen conditions are always the biggest risk to asbestos remediation projects, and could potentially delay the start of school.
- The short-duration schedule presents an additional challenge that work is conducted during the busiest time of year for contractors, the pool of qualified asbestos abatement contractors is relatively small, and other projects and school districts are competing for the same pool of contractors, limiting the interest in the project by potential bidders.

Health & Safety: Lead Paint Stabilization

May 2022

PPS Team Lead: Chris Boyce

Number of Completed Projects: 2

Number of Active Projects: 5

STATUS AT A GLANCE

Legend:

| | |
|--|-----------------------------|
| | As planned: no concerns |
| | Caution: requires attention |
| | Impacts: impacts occurring |

| | As Planned | Caution | Impacts |
|----------|------------|---------|---------|
| Budget | X | | |
| Equity | | | X |
| Schedule | X | | |
| Overall | X | | |

BUDGET

| | BUDGET | | FUNDING | | PROGRESS | | FORECAST | |
|--|-------------------|-------------------|-------------------|------------------|--------------------------------|--------------------------|---------------------------|--------------------|
| | Original Budget | Current Budget | Paint Funds | Other Funds | Actuals To Date (all funds) | Additional Encumbered | Estimate At Completion | Over/Under |
| Unallocated Funds | 16,623,936 | 3,790,587 | 3,790,587 | - | - | - | - | (3,790,587) |
| Mult Sites - 5466 | - | 4,100,000 | 4,000,000 | 100,000 | 1,577,386 | 99,986 | 4,100,000 | - |
| Mult Sites - Emerg Dec - 4284 - FY17 | - | 1,273,500 | 395,243 | 878,257 | 1,273,500 | - | 1,273,500 | - |
| Mult Sites - 4493 - FY17 | - | 577,003 | 438,795 | 138,209 | 438,795 | - | 577,003 | - |
| Mult Sites - PacIndPaint - 5495 - FY21 | - | 1,500,000 | 1,500,000 | - | 11,509 | 991 | 1,500,000 | - |
| Mult Sites - ASA - 5550 - FY21 | - | 1,500,000 | 1,500,000 | - | - | - | 1,500,000 | - |
| Mult Sites - Fulcrum - 5551 - FY21 | - | 1,500,000 | 1,500,000 | - | - | - | 1,500,000 | - |
| Mult Sites - First Cascade - 5552 - FY21 | - | 1,500,000 | 1,500,000 | - | 200,400 | - | 1,500,000 | - |
| Lead Paint Totals | 16,623,936 | 15,741,090 | 14,624,624 | 1,116,466 | 3,501,590 | 100,977 | 11,950,503 | (3,790,587) |

EQUITY*

Percent of payments made to Certified owned businesses, percent of labor hours of apprenticeable trades; cumulative

| | MBE | WBE | SDVBE | ESB | N-C | TOTAL | goal | MIN | goal | FEM | goal | APPR | req |
|-------------|-------|-------|-------|-------|-------|--------------|------|-----|------|-----|------|------|-----|
| Consultants | 0.00% | 0.00% | 0.00% | 0.00% | 0.00% | 0.00% | 18% | | | | | | |
| Contractors | 0.00% | 0.00% | 0.00% | 0.00% | 0.00% | 0.00% | 18% | | | | | | |
| Overall | 0.00% | 0.00% | 0.00% | 0.00% | 0.00% | 0.00% | 18% | | | | | | |
| Workforce** | | | | | | | | N/A | 25% | N/A | 14% | N/A | 20% |

** See note below in Progress.

**Workforce Equity requirements are only applied to Public Improvement (construction) contracts over \$200,000. There is currently no data to report.

Health & Safety: Lead Paint Stabilization

May 2022

PPS Team Lead: Chris Boyce

Number of Completed Projects: 2

Number of Active Projects: 5

SCHEDULE

| PROJECT | 2022 | | | | | | | | 2023 | | | | | | | |
|--|------|-----|-----|-----|-----|-----|-----|-----|------|-----|-----|-----|-----|-----|-----|-----|
| | MAY | JUN | JUL | AUG | SEP | OCT | NOV | DEC | JAN | FEB | MAR | APR | MAY | JUN | JUL | AUG |
| Mult Sites - 5466 | ★ | | | | | | | | | | | | | | | |
| Mult Sites - PacIndPaint - 5495 - FY21 | ★ | | | | | | | | | | | | | | | |
| Mult Sites - ASA - 5550 - FY21 | ★ | | | | | | | | | | | | | | | |
| Mult Sites - Fulcrum - 5551 - FY21 | ★ | | | | | | | | | | | | | | | |
| Mult Sites - First Cascade - 5552 - FY21 | ★ | | | | | | | | | | | | | | | |

Baseline

Planning

Design

Construction

PROJECT NOTES

Progress:

- OSM Paint crew:
 - + **Phase 1 Interior locations accessible to PreK-2nd Graders:** COMPLETE
 - + **Phase 2 and Phase 3 (PreK - 2nd Grade exterior and additional interior locations):** 36 exterior and 54 interior sites completed
 - + Have begun work on middle school interiors and exteriors
- Business Equity:
 - + Four IDIQ (master service) agreements have been executed. Two of the four contractors are Certified Businesses but have not yet taken on work scope.

Accomplishments:

- OSM paint crew has been to every elementary level and pre-school site. Some amount of interior and exterior work has been done at every K-5, K-8, and K-12 site.
- Additional procurement options have been put in place to help address supply chain issues with paint
- OSM Paint crew has been tackling larger scope (exterior and interior areas at same time) when at a site, increasing efficiency
- Interior work at Middle Schools is being done in one phase. This approach often takes longer but in most cases all work complete in one mobilization.
- Grant from Portland Water Bureau helped fund a window replacement project managed by FAM at Applegate Head Start.
- Awarded another \$50,000 grant from Portland Water Bureau for 2022-2023 school year.

Risks:

- Supply chain issues continue but to a lesser extent.
- Accelerating larger scope projects to help wrap up sites that involve larger areas or some level of construction to repair painted substrate.

Health & Safety: Roof Improvements

May 2022

PPS Team Leads: Steve Simonson, Robert Jole

Number of Completed Projects: 15

Number of Active Projects: 3

STATUS AT A GLANCE

Legend:

| | |
|--|-----------------------------|
| | As planned: no concerns |
| | Caution: requires attention |
| | Impacts: impacts occurring |

| | As Planned | Caution | Impacts |
|----------|------------|---------|---------|
| Budget | X | | |
| Equity | X | | |
| Schedule | X | | |
| Overall | X | | |

BUDGET

| | BUDGET | | FUNDING | | PROGRESS | | FORECAST | |
|---------------------------------|-----------------|--------------------|-------------------|-------------------|--------------------------------|--------------------------|---------------------------|--------------------|
| | Original Budget | Current Budget | Roof Funds | Other Funds | Actuals To Date (all funds) | Additional Encumbered | Estimate At Completion | Over/Under |
| Unallocated Funds | 50,907,949 | 3,047,111 | 3,047,111 | - | - | - | - | (3,047,111) |
| Chapman - 4671 - FY18 | - | 4,036,707 | 3,987,307 | 49,400 | 4,036,707 | - | 4,036,707 | - |
| Duniway - 5420 - FY21 | - | 949,503 | 938,007 | 11,496 | 472,173 | 151,182 | 949,503 | - |
| GROUP 3 (IP 2017) | - | 22,320,057 | 10,648,856 | 11,671,201 | 21,950,786 | - | 22,320,057 | - |
| Harrison Park - 5321 - FY20 | - | 2,746,774 | 2,680,274 | 66,500 | 2,746,674 | - | 2,746,774 | - |
| Hayhurst - SRGP - 5028 - FY19 | - | 4,576,977 | 2,076,977 | 2,500,000 | 4,092,889 | - | 4,576,977 | - |
| Jackson - 5030 - FY19 | - | 3,972,722 | 3,972,722 | - | 3,968,943 | 443 | 3,972,722 | - |
| Kelly - 5319 - FY20 | - | 1,649,098 | 1,649,098 | - | 1,649,098 | - | 1,649,098 | - |
| Lee - 4497 - FY18 | - | 97,000 | 96,750 | 250 | 97,000 | - | 97,000 | - |
| MLC - 5422 - FY21 | - | 659,699 | 659,699 | - | 546,841 | 88,528 | 659,699 | - |
| Mt Tabor - 5320 - FY20 | - | 3,022,689 | 3,022,689 | - | 3,022,689 | - | 3,022,689 | - |
| Middle School Conv - 4586-FY18 | - | 32,540,735 | 3,781,759 | 28,758,976 | 32,326,731 | - | 32,540,735 | - |
| Group 1 Design - 5153 - FY20 | - | 751,521 | 751,521 | - | 751,521 | - | 751,521 | - |
| Group 2 Design - 5154 - FY20 | - | 1,146,401 | 1,146,401 | - | 1,146,401 | - | 1,146,401 | - |
| Ockley Green - 5322 - FY20 | - | 1,957,686 | 1,871,486 | 86,200 | 1,957,686 | - | 1,957,686 | - |
| Rieke - 5423 - FY21 | - | 367,693 | 367,693 | - | 266,871 | 96,759 | 367,693 | - |
| Rigler - 5029 - FY19 | - | 9,671,934 | 7,173,566 | 2,498,368 | 9,671,934 | - | 9,671,934 | - |
| Sitton - 5027 - FY19 | - | 6,746,662 | 3,468,883 | 3,277,779 | 6,744,662 | - | 6,746,662 | - |
| Woodlawn - 5323 - FY20 | - | 1,699,984 | 1,645,634 | 54,350 | 1,699,984 | - | 1,699,984 | - |
| Roof Improvements Totals | | 101,960,955 | 52,986,434 | 48,974,521 | 97,149,591 | 336,912 | 98,913,843 | (3,047,111) |

Health & Safety: Roof Improvements

May 2022

PPS Team Leads: Steve Simonson, Robert Jole

Number of Completed Projects: 15

Number of Active Projects: 3

EQUITY* *Percent of payments made to Certified owned businesses, percent of labor hours of apprenticeable trades; cumulative*

| | MBE | WBE | SDVBE | ESB | N-C | TOTAL | goal | MIN | goal | FEM | goal | APPR | req |
|-------------|-------|--------|-------|-------|-------|---------------|------|-----|------|-----|------|------------|-----|
| Consultants | 0.38% | 34.60% | 0.00% | 1.46% | 0.59% | 37.03% | 18% | | | | | | |
| Contractors | 2.33% | 10.65% | 0.00% | 3.21% | 0.00% | 16.19% | 18% | | | | | | |
| Overall | 2.16% | 12.76% | 0.00% | 3.05% | 0.05% | 18.03% | 18% | | | | | | |
| Workforce | | | | | | | | 37% | 25% | 6% | 14% | 28% | 20% |

*Equity numbers are for Consolidated projects, which include roof and accessibility improvements.

SCHEDULE

| PROJECT | 2022 | | | | | | | | 2023 | | | | | | | |
|-----------------------|------|-----|-----|-----|-----|-----|-----|-----|------|-----|-----|-----|-----|-----|-----|-----|
| | MAY | JUN | JUL | AUG | SEP | OCT | NOV | DEC | JAN | FEB | MAR | APR | MAY | JUN | JUL | AUG |
| Duniway - 5420 - FY21 | ★ | | | | | | | | | | | | | | | |
| MLC - 5422 - FY21 | ★ | | | | | | | | | | | | | | | |
| Rieke - 5423 - FY21 | ★ | | | | | | | | | | | | | | | |

| | | | | | | |
|----------|--|----------|--|--------|--|--------------|
| Baseline | | Planning | | Design | | Construction |
|----------|--|----------|--|--------|--|--------------|

PROJECT NOTES

Progress:

- Design has been completed on Duniway, MLC and Rieke with 2017 Bond Roof funds, with construction funded by 2020 Bond Roof funds. This project status page continues to track the expenditure of the 2017 Bond funds on design through completion of construction administration.
- MLC and Rieke will complete construction this summer. Duniway design is ongoing on non-conforming upgrades required by the City of Portland. Duniway will bid in November/December 2022 and go into construction for Summer 2023.

Accomplishments:

- 18 major roof replacements have been funded by the 2017 Bond Health & Safety Roof Improvements funding.
- OSM is reviewing the remaining funds to determine whether an additional roof replacement project can be funded.

STATUS AT A GLANCE

Legend:

| | |
|--|-----------------------------|
| | As planned: no concerns |
| | Caution: requires attention |
| | Impacts: impacts occurring |

| | As Planned | Caution | Impacts |
|----------|------------|---------|---------|
| Budget | X | | |
| Equity | | | X |
| Schedule | | | X |
| Overall | | | X |

BUDGET

| | BUDGET | | FUNDING | | PROGRESS | | FORECAST | |
|--------------------------------|------------------|-------------------|------------------|-------------------|--------------------------------|--------------------------|---------------------------|--------------------|
| | Original Budget | Current Budget | Security Funds | Other Funds | Actuals To Date (all funds) | Additional Encumbered | Estimate At Completion | Over/Under |
| Unallocated Funds | 5,000,000 | 716,103 | 716,103 | - | - | - | - | (716,103) |
| Benson-Kenton - 5013 | - | 1,895,507 | 69,646 | 1,825,861 | 1,687,427 | 48,035 | 1,895,507 | - |
| Creative Science - 5049 - FY20 | - | 12,855 | 12,855 | - | 12,855 | - | 12,855 | - |
| Jefferson - 4528 - FY17 | - | 30,859 | 30,859 | - | 30,859 | - | 30,859 | - |
| 4675-Security-PKG1 FY18-19 | - | 2,512,541 | 2,512,541 | - | 1,834,984 | 619,688 | 2,508,157 | (4,384) |
| 5025-Security-PKG2-FY19 | - | 2,419,821 | 2,419,821 | - | 2,048,635 | 5,890 | 2,054,525 | (365,296) |
| 5026-Security-PKG3-FY19 | - | 3,256,981 | 3,256,981 | - | 3,256,981 | - | 3,256,981 | - |
| Middle School Conv - 4586-FY18 | - | 32,540,735 | 303,414 | 32,237,321 | 32,326,731 | - | 32,540,735 | - |
| Security Totals | 5,000,000 | 43,385,403 | 9,322,221 | 34,063,182 | 41,198,472 | 673,613 | 42,299,620 | (1,085,783) |

EQUITY

Percent of payments made to Certified owned businesses, percent of labor hours of apprenticeable trades; cumulative

| | MBE | WBE | SDVBE | ESB | N-C | TOTAL | goal | MIN | goal | FEM | goal | APPR | req |
|-------------|-------|--------|-------|-------|-------|---------------|------|-----|------|-----|------|------------|-----|
| Consultants | 0.00% | 93.32% | 0.00% | 0.00% | 0.00% | 93.32% | 18% | | | | | | |
| Contractors | 0.00% | 0.00% | 0.00% | 0.17% | 0.00% | 0.17% | 18% | | | | | | |
| Overall | 0.00% | 2.95% | 0.00% | 0.16% | 0.00% | 3.12% | 18% | | | | | | |
| Workforce | | | | | | | | 17% | 25% | 3% | 14% | 38% | 20% |

SCHEDULE

| PROJECT | 2022 | | | | | | | | 2023 | | | | | | | |
|----------------------------|------|-----|-----|-----|-----|-----|-----|-----|------|-----|-----|-----|-----|-----|-----|-----|
| | MAY | JUN | JUL | AUG | SEP | OCT | NOV | DEC | JAN | FEB | MAR | APR | MAY | JUN | JUL | AUG |
| 4675-Security-PKG1 FY18-19 | ★ | | | | | | | | | | | | | | | |
| 5025-Security-PKG2-FY19 | ★ | | | | | | | | | | | | | | | |

Baseline

Planning

Design

Construction

PROJECT NOTES

Progress:

- All security upgrades except fencing at two school sites (Beaumont and Cleveland) have been completed.
- The fencing was put on hold while the project team met with school staff, security services and facilities to verify the fencing was needed/desired and to clarify final scope direction. This pushed the schedule past the baseline for the project as a whole.
- There were multiple unforeseen issues at Cleveland that required review and re-verification of field conditions that delayed work at both sites due to procurement delays. However, product has been procured, the concrete work and low voltage installation are underway, and the fencing installation will take place in the summer to allow that work to be done while school is not in session.

Risks:

- Most risks have been mitigated at this point. There may still be unforeseen conditions during fencing installation, but most of those have been discovered as part of the concrete and low voltage work.

Health & Safety: Water Quality

May 2022

PPS Team Lead: Steve Varblow

Number of Completed Projects: 6

Number of Active Projects: 16

STATUS AT A GLANCE

Legend:

| | |
|--|-----------------------------|
| | As planned: no concerns |
| | Caution: requires attention |
| | Impacts: impacts occurring |

| | As Planned | Caution | Impacts |
|----------|------------|---------|---------|
| Budget | X | | |
| Equity | X | | |
| Schedule | | | X |
| Overall | | | X |

BUDGET

| | BUDGET | | FUNDING | | PROGRESS | | FORECAST | |
|------------------------------------|-----------------|-------------------|-------------------|------------------|--------------------------------|--------------------------|---------------------------|---------------------|
| | Original Budget | Current Budget | Water Funds | Other Funds | Actuals To Date (all funds) | Additional Encumbered | Estimate At Completion | Over/Under |
| Unallocated Funds | 28,492,000 | 10,247,556 | 10,247,556 | - | - | | - | (10,247,556) |
| Lead In Water-Emerg Resp - 4241 | - | 4,810,451 | 311,867 | 4,498,584 | 4,350,597 | 212,913 | 4,810,451 | - |
| Lead In Water Repairs - 4517 | - | 7,129,461 | 7,120,756 | 8,705 | 3,124,130 | 808,304 | 7,129,461 | - |
| Drink Fixt - Bid Package 31 - 5301 | - | 349,125 | 349,125 | - | 277,770 | 2,360 | 277,770 | (71,355) |
| Drink Fixt - Bid Package 32 - 5397 | - | 342,136 | 342,136 | - | 220,344 | 37,288 | 306,632 | (35,504) |
| Drink Fixt - Bid Package 33 - 5398 | - | 283,173 | 283,173 | - | 273,218 | 7,406 | 283,173 | - |
| Drink Fixt - Bid Package 34 - 5390 | - | 354,142 | 354,142 | - | 322,269 | 9,032 | 354,142 | - |
| Drink Fixt - Bid Package 35 - 5391 | - | 355,960 | 355,960 | - | 346,367 | - | 355,960 | - |
| Drink Fixt - Bid Package 36 - 5452 | - | 363,074 | 363,074 | - | 307,818 | 38,384 | 363,074 | - |
| Drink Fixt - Bid Package 37 - 5453 | - | 357,963 | 357,963 | - | 337,885 | 27,352 | 365,238 | 7,275 |
| Drink Fixt - Bid Package 38 - 5477 | - | 384,456 | 384,456 | - | 291,605 | 58,250 | 384,456 | - |
| Drink Fixt - Bid Package 39 - 5478 | - | 326,040 | 326,040 | - | 309,196 | 6,515 | 326,040 | - |
| Drink Fixt - Bid Package 40 - 5540 | - | 326,040 | 326,040 | - | 296,696 | - | 326,040 | - |
| Drink Fixt - Bid Package 41 - 5541 | - | 484,440 | 484,440 | - | 443,614 | - | 484,440 | - |
| Drink Fixt - Bid Package 42 - 5542 | - | 464,072 | 464,072 | - | 163,240 | 259,066 | 464,072 | - |
| Drink Fixt - Bid Package 43 - 5640 | - | 386,229 | 386,229 | - | 298,944 | 52,524 | 386,229 | - |
| Drink Fixt - Bid Package 44 - 4651 | - | 324,442 | 324,442 | - | 195,863 | 99,379 | 324,442 | - |
| Drink Fixt - Bid Package 45 - 5642 | - | 430,011 | 430,011 | - | 14,158 | 377,152 | 430,011 | - |
| Drink Fixt - Bid Package 46 - 5741 | - | 383,900 | 383,900 | - | 18,160 | 330,840 | 383,900 | - |
| Drink Fixt - Bid Package 47 - 5742 | - | 331,955 | 331,955 | - | 302 | 301,777 | 331,955 | - |
| Drink Fixt - Bid Package 48 - 5743 | - | 409,860 | 409,860 | - | 371,573 | 1,400 | 409,860 | - |
| Drink Fixt - Bid Package 49 - 5744 | - | 144,426 | 144,426 | - | 9,026 | 122,270 | 144,426 | - |
| Drink Fixt - Bid Package 50 - 5866 | - | 467,060 | 467,060 | - | - | 424,600 | 467,060 | - |
| Water Quality Totals | | 29,455,970 | 24,948,682 | 4,507,288 | 11,972,775 | 3,176,812 | 19,108,830 | (10,347,141) |

Health & Safety: Water Quality

May 2022

PPS Team Lead: Steve Varblow

Number of Completed Projects: 6

Number of Active Projects: 16

EQUITY

Percent of payments made to Certified owned businesses, percent of labor hours of apprenticeable trades; cumulative

| | MBE | WBE | SDVBE | ESB | N-C | TOTAL | goal | MIN | goal | FEM | goal | APPR | req |
|-------------|-------|--------|-------|--------|-------|---------------|------|-----|------|-----|------|------|-----|
| Consultants | 0.00% | 62.82% | 0.00% | 13.49% | 0.00% | 76.30% | 18% | | | | | | |
| Contractors | 0.00% | 0.00% | 0.00% | 33.40% | 0.00% | 33.40% | 18% | | | | | | |
| Overall | 0.00% | 5.01% | 0.00% | 31.81% | 0.00% | 36.82% | 18% | | | | | | |
| Workforce | | | | | | | | 5% | 25% | 13% | 14% | 12% | 20% |

SCHEDULE

| PROJECT | 2022 | | | | | | | | 2023 | | | | | | | |
|------------------------------------|------|-----|-----|-----|-----|-----|-----|-----|------|-----|-----|-----|-----|-----|-----|-----|
| | MAY | JUN | JUL | AUG | SEP | OCT | NOV | DEC | JAN | FEB | MAR | APR | MAY | JUN | JUL | AUG |
| Lead In Water Repairs - 4517 | ★ | | | | | | | | | | | | | | | |
| Drink Fixt - Bid Package 32 - 5397 | ★ | | | | | | | | | | | | | | | |
| Drink Fixt - Bid Package 33 - 5398 | ★ | | | | | | | | | | | | | | | |
| Drink Fixt - Bid Package 34 - 5390 | ★ | | | | | | | | | | | | | | | |
| Drink Fixt - Bid Package 35 - 5391 | ★ | | | | | | | | | | | | | | | |
| Drink Fixt - Bid Package 36 - 5452 | ★ | | | | | | | | | | | | | | | |
| Drink Fixt - Bid Package 37 - 5453 | ★ | | | | | | | | | | | | | | | |
| Drink Fixt - Bid Package 38 - 5477 | ★ | | | | | | | | | | | | | | | |
| Drink Fixt - Bid Package 39 - 5478 | ★ | | | | | | | | | | | | | | | |
| Drink Fixt - Bid Package 40 - 5540 | ★ | | | | | | | | | | | | | | | |
| Drink Fixt - Bid Package 41 - 5541 | ★ | | | | | | | | | | | | | | | |
| Drink Fixt - Bid Package 42 - 5542 | ★ | | | | | | | | | | | | | | | |
| Drink Fixt - Bid Package 43 - 5640 | ★ | | | | | | | | | | | | | | | |
| Drink Fixt - Bid Package 44 - 4651 | ★ | | | | | | | | | | | | | | | |
| Drink Fixt - Bid Package 45 - 5642 | ★ | | | | | | | | | | | | | | | |
| Drink Fixt - Bid Package 46 | ★ | | | | | | | | | | | | | | | |
| Drink Fixt - Bid Package 47 | ★ | | | | | | | | | | | | | | | |
| Drink Fixt - Bid Package 48 | ★ | | | | | | | | | | | | | | | |
| Drink Fixt - Bid Package 49 | ★ | | | | | | | | | | | | | | | |
| Drink Fixt - Bid Package 50 | ★ | | | | | | | | | | | | | | | |

Baseline

Planning

Design

Construction

PROJECT NOTES

Progress:

Design:

- All school/ facility designs completed in 2021.
- Design Engineer continues to work through construction questions and issues.

Bid/ Procurement:

- All bid packages have been awarded
- Fixtures ordered directly by PPS stored at Rose City Moving and Storage and 80% have been distribute to contractors/projects.

Construction:

- 56 schools substantially complete, 35 schools under construction, 7 schools/facilities ready for construction (will start when workforce is ready)

Accomplishments:

Efficient Use of Budget:

- Bids have been received for all 20 design packages. The contractor's bid, along with a 10% contingency, was 82% of the original cost estimate.
- Six bid packages have completed construction and they used, on average, about 4% of their project contingency .

Low Test Results:

- The program has tested over 542 new filtered fixtures in almost 60 schools/facilities. The average result for all the fixture tests are 0.62 parts per billion.
- Over 299 new filtered Drinking Water Stations with two bubblers and a bottle filler were tested with an average result of 0.267 parts per billion.
- The Filtered Water Program's goal is to have test results averaging less than 1.0 parts per billion.

Risks:

Workforce/ Schedule:

- Several contractors are having workforce issues causing the schedules for their projects to be extended. The team is working with these contractors to make sure work is finished by the end of summer 2022, when their contracts will expire and not be allowed to extend.

Supply Delays:

- Long lead times continue to be an issue, particularly for fixture or equipment changes due to unforeseen conditions.

Follow-up Testing:

- Installed fixtures are tested after several months of normal use to verify the continued effectiveness of the filters. This follow-up testing has shown very successful numbers for drinking water stations (0.324 ppb). Specialty fixtures and kitchen fixtures have shown slightly higher numbers, with specialty fixtures averaging 1.80 ppb and kitchen fixtures averaging 1.35 ppb. These numbers are still significantly less than the state requirement of <15 ppb but are not the ultra-low, <1 ppb numbers that we want to achieve. The team is looking at several solutions to improve future numbers.

2020 Capacity

May 2022

PPS Team Leads: Clark Ide

Number of Completed Projects: 0

Number of Active Projects: 2

STATUS AT A GLANCE

Legend:

| | |
|--|-----------------------------|
| | As planned: no concerns |
| | Caution: requires attention |
| | Impacts: impacts occurring |

| | As Planned | Caution | Impacts |
|----------|------------|---------|---------|
| Budget | | | X |
| Equity | | X | |
| Schedule | | X | |
| Overall | | | X |

BUDGET

| | BUDGET | | FUNDING | | PROGRESS | | FORECAST | |
|--------------------------------|-----------------|-------------------|-------------------|-------------|--------------------------------|--------------------------|---------------------------|------------------|
| | Original Budget | Current Budget | Capacity Funds | Other Funds | Actuals To Date (all funds) | Additional Encumbered | Estimate At Completion | Over/Under |
| Unallocated Funds | 10,000,000 | 682,078 | 682,078 | - | - | - | - | (682,078) |
| Harrison Park - MS Conv - 5706 | - | 4,917,922 | 4,917,922 | - | 365,165 | 2,481,338 | 11,713,000 | 6,795,078 |
| Terwilliger - ACCESS - 5396 | - | 4,400,000 | 4,400,000 | - | 3,365,106 | 1,694,683 | 7,342,502 | 2,942,502 |
| 2020 Mechanical Totals | | 10,000,000 | 10,000,000 | - | 3,730,271 | 4,176,022 | 19,055,502 | 9,055,502 |

EQUITY

Percent of payments made to Certified owned businesses, percent of labor hours of apprenticeable trades; cumulative

| | MBE | WBE | SDVBE | ESB | N-C | TOTAL | goal | MIN | goal | FEM | goal | APPR | req |
|-------------|-------|--------|-------|-------|-------|---------------|------|-----|------|-----|------|------|-----|
| Consultants | 0.00% | 47.53% | 0.00% | 8.46% | 0.00% | 56.00% | 18% | | | | | | |
| Contractors | 0.00% | 0.00% | 0.00% | 0.00% | 0.00% | 0.00% | 18% | | | | | | |
| Overall | 0.00% | 7.74% | 0.00% | 1.38% | 0.00% | 9.12% | 18% | | | | | | |
| Workforce | | | | | | | | 31% | 25% | 8% | 14% | 26% | 20% |

SCHEDULE

| PROJECT | 2022 | | | | | | | | 2023 | | | | | | | |
|--------------------------------|------|-----|-----|-----|-----|-----|-----|-----|------|-----|-----|-----|-----|-----|-----|-----|
| | MAY | JUN | JUL | AUG | SEP | OCT | NOV | DEC | JAN | FEB | MAR | APR | MAY | JUN | JUL | AUG |
| Harrison Park - MS Conv - 5706 | ★ | | | | | | | | | | | | | | | |
| Terwilliger - ACCESS - 5396 | ★ | | | | | | | | | | | | | | | |

| | | | |
|----------|----------|--------|--------------|
| Baseline | Planning | Design | Construction |
|----------|----------|--------|--------------|

2020 Capacity

May 2022

PPS Team Leads: Clark Ide

Number of Completed Projects: 0

Number of Active Projects: 2

PROJECT NOTES

Progress:

- Terwilliger: Renovation has reached substantial completion on 90% of improvements and general punch walk has been held. Project still has outstanding exterior safety work, due to changed conditions, and door hardware installation that will be completed in the coming months. PBOT ROW improvements and main building mechanical ducting installation are ready to begin pending permit issuance.
- Harrison Park: Construction contract for Phase 1 work has been awarded and will begin in June 2022. A/E team is actively working on additional design phases for full conversion to a middle school. A planned phase 2 had to be split into two phases in order to accommodate mechanical system replacement as part of the scope of work. Existing 2020 Capacity funds are not enough to fund the full scope of necessary work to ensure Harrison Park meets middle school education specifications. Additional funding will be added from 2020 Security, 2020 ADA, and 2020 Mechanical to complete those scopes of work as part of this project (budgets currently under review), and from 2020 Program contingency to address the remaining need (\$6.8M).

Accomplishments:

- Terwilliger: All original scope construction work is nearly complete. Additional mechanical ducting work has been designed and approved pricing has been received from GC. Approved pricing for PBOT ROW has been received from GC.
- Harrison Park: Phase 1 of work has been designed and awarded to a contractor.

Risks:

- Terwilliger Schedule/Budget: PBOT ROW work and additional mechanical ducting work have cost and schedule risks due to permit delays, continued supply chain issues, and escalating material costs.
- Harrison Park Schedule: Risks for Phase 1 work are possible due to long lead items caused by the supply chain issues. The GC is actively ordering the long lead items in an effort to avoid any schedule delays. We will continue to monitor this risk and work with the contractor to alleviate as best possible.
- Harrison Park Budget: Continued material escalation poses a budget risk for future construction phases of the project. We will attempt to reduce this risk by getting a GC on earlier for the future phases and procuring long lead, high dollar items prior to construction work starting.

2020 Infrastructure: Mechanical

May 2022

PPS Team Leads: Steve Simonson, Clark Ide

Number of Completed Projects: 0

Number of Active Projects: 4

STATUS AT A GLANCE

Legend:

| | |
|--|-----------------------------|
| | As planned: no concerns |
| | Caution: requires attention |
| | Impacts: impacts occurring |

| | As Planned | Caution | Impacts |
|----------|------------|---------|---------|
| Budget | X | | |
| Equity | X | | |
| Schedule | X | | |
| Overall | X | | |

BUDGET

| | BUDGET | | FUNDING | | PROGRESS | | FORECAST | |
|-------------------------------|-----------------|-------------------|-------------------|-------------|--------------------------------|--------------------------|---------------------------|---------------------|
| | Original Budget | Current Budget | Mech Funds | Other Funds | Actuals To Date (all funds) | Additional Encumbered | Estimate At Completion | Over/Under |
| Unallocated Funds | 75,000,000 | 46,426,028 | 46,426,028 | - | - | - | - | (46,426,028) |
| 2020 Bond Mech Assess - 5626 | - | 83,720 | 83,720 | - | 63,000 | 6,800 | 83,720 | - |
| Bridger-Mech Upgrades-5827 | - | 7,342,502 | 7,342,502 | - | 24,586 | 777,028 | 7,342,502 | - |
| Kelly-Mech Upgrades-5828 | - | 9,434,661 | 9,434,661 | - | 22,365 | 900,698 | 9,434,661 | - |
| Lent-Mech Upgrades-5829 | - | 11,713,089 | 11,713,089 | - | 219,464 | 906,151 | 11,713,089 | - |
| 2020 Mechanical Totals | | 75,000,000 | 75,000,000 | - | 329,415 | 2,590,677 | 28,573,972 | (46,426,028) |

EQUITY*

Percent of payments made to Certified owned businesses, percent of labor hours of apprenticeable trades; cumulative

| | MBE | WBE | SDVBE | ESB | N-C | TOTAL | goal | MIN | goal | FEM | goal | APPR | req |
|-------------|-------|--------|-------|-------|-------|---------------|------|-----|------|-----|------|-----------|-----|
| Consultants | 0.00% | 73.79% | 0.00% | 0.00% | 0.00% | 73.79% | 18% | | | | | | |
| Contractors | 0.00% | 0.00% | 0.00% | 0.00% | 0.00% | 0.00% | 18% | | | | | | |
| Overall | 0.00% | 73.79% | 0.00% | 0.00% | 0.00% | 73.79% | 18% | | | | | | |
| Workforce | | | | | | | | 0% | 25% | 0% | 14% | 0% | 20% |

*There have been no construction payments to date.

2020 Infrastructure: Mechanical

May 2022

PPS Team Leads: Steve Simonson, Clark Ide

Number of Completed Projects: 0

Number of Active Projects: 4

SCHEDULE

| PROJECT | 2022 | | | | | | | | 2023 | | | | | | | |
|------------------------------|------|-----|-----|-----|-----|-----|-----|-----|------|-----|-----|-----|-----|-----|-----|-----|
| | MAY | JUN | JUL | AUG | SEP | OCT | NOV | DEC | JAN | FEB | MAR | APR | MAY | JUN | JUL | AUG |
| 2020 Bond Mech Assess - 5626 | ★ | | | | | | | | | | | | | | | |
| Bridger-Mech Upgrades-5827 | ★ | | | | | | | | | | | | | | | |
| Kelly-Mech Upgrades-5828 | ★ | | | | | | | | | | | | | | | |
| Lent-Mech Upgrades-5829 | ★ | | | | | | | | | | | | | | | |

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|----------|--|--|--|--|--|--|--|--|--|--|--|--|--|--|--|--|
| Baseline | | | | | | | | | | | | | | | | |
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PROJECT NOTES

Progress:

- Design is ongoing for an initial group of schools with mechanical system failures that required immediate attention.
- Due to the challenges of installing full mechanical system replacements during summer break, project teams are working through how best to manage phasing and implementation while sites are occupied. Construction is shown above as starting in fall 2022 and continuing through summer 2023, but final schedules may differ.

Accomplishments:

- Significant progress has been made on design of 2022 projects with ongoing work to deliver complete packages as soon as possible.

Risks:

- There is major concern regarding contractor availability and material/equipment procurement due to the continued pandemic.

2020 Infrastructure: Roof

May 2022

PPS Team Leads: Steve Simonson, Clark Ide

Number of Completed Projects: 0

Number of Active Projects: 14

STATUS AT A GLANCE

Legend:

| | |
|--|-----------------------------|
| | As planned: no concerns |
| | Caution: requires attention |
| | Impacts: impacts occurring |

| | As Planned | Caution | Impacts |
|----------|------------|---------|---------|
| Budget | X | | |
| Equity | X | | |
| Schedule | X | | |
| Overall | X | | |

BUDGET

| | BUDGET | | FUNDING | | PROGRESS | | FORECAST | |
|------------------------------------|-----------------|-------------------|-------------------|-------------|------------------|-----------------------|------------------------|---------------------|
| | Original Budget | Current Budget | Bond Funds | Other Funds | Actuals To Date | Additional Encumbered | Estimate At Completion | Over/Under |
| Unallocated Funds | 65,700,000 | 14,134,480 | 14,134,480 | - | - | - | - | (14,134,480) |
| 2020 Bond Roof Assessments - 5578 | - | 213,785 | 213,785 | - | 184,914 | - | 213,785 | - |
| Ainsworth Annex-Re-Roof-5792 | - | 2,008,610 | 2,008,610 | - | 71,805 | 1,757,051 | 2,008,610 | - |
| Chavez-Partial Re-Roof-5791 | - | 1,343,656 | 1,343,656 | - | 125,412 | 49,596 | 2,327,982 | 984,326 |
| Duniway - Re-Roof Phase 1 - 5667 | - | 3,636,691 | 3,636,691 | - | 3,052,683 | 41,088 | 3,105,054 | (531,637) |
| Duniway - Re-Roof Phase II - 55894 | - | 3,461,147 | 3,461,147 | - | - | 4,259 | 3,461,147 | - |
| Glencoe-Re-Roof-5790 | - | 6,783,914 | 6,783,914 | - | 431,910 | 5,714,253 | 7,524,511 | 740,597 |
| Markham-Partial Re-Roof-5896 | - | 3,565,722 | 3,565,722 | - | - | - | 3,565,722 | - |
| Meek - Re-Roof-Bond - 5895 | - | 5,599,585 | 5,599,585 | - | - | - | 5,599,585 | - |
| MLC - 2020 Bond - 5668 | - | 3,850,912 | 3,850,912 | - | 1,253,508 | 1,833,912 | 3,850,912 | - |
| Richmond-Partial Re-Roof-5911 | - | 2,156,776 | 2,156,776 | - | - | - | 2,156,776 | - |
| Rieke - Re-Roof - 5909 | - | 3,054,814 | 3,054,814 | - | - | 2,391,129 | 3,054,814 | - |
| Skyline - Partial ReRoof-5912 | - | 1,727,817 | 1,727,817 | - | - | - | 1,727,817 | - |
| Vernon-Partial Re-Roof-5913 | - | 3,896,832 | 3,896,832 | - | - | - | 3,896,832 | - |
| West Sylvan-Re-Roof-5789 | - | 7,551,047 | 7,551,047 | - | 46,451 | 544,037 | 7,551,047 | - |
| Winterhaven-Partial ReRoof-5914 | - | 2,714,212 | 2,714,212 | - | - | - | 2,714,212 | - |
| 2020 Roof Totals | | 65,700,000 | 65,700,000 | - | 5,166,682 | 12,335,325 | 52,758,805 | (12,941,195) |

2020 Infrastructure: Roof

May 2022

PPS Team Leads: Steve Simonson, Clark Ide

Number of Completed Projects: 0

Number of Active Projects: 14

EQUITY

Percent of payments made to Certified owned businesses, percent of labor hours of apprenticeable trades; cumulative

| | MBE | WBE | SDVBE | ESB | N-C | TOTAL | goal | MIN | goal | FEM | goal | APPR | req |
|-------------|-------|--------|-------|-------|-------|---------------|------|-----|------|-----|------|------|-----|
| Consultants | 0.00% | 77.90% | 0.00% | 0.00% | 0.00% | 77.90% | 18% | | | | | | |
| Contractors | 7.55% | 1.85% | 0.00% | 0.63% | 0.00% | 10.04% | 18% | | | | | | |
| Overall | 6.27% | 14.75% | 0.00% | 0.53% | 0.00% | 21.55% | 18% | | | | | | |
| Workforce | | | | | | | | 41% | 25% | 11% | 14% | 25% | 20% |

SCHEDULE

| PROJECT | 2022 | | | | | | | | 2023 | | | | | | | |
|------------------------------------|------|-----|-----|-----|-----|-----|-----|-----|------|-----|-----|-----|-----|-----|-----|-----|
| | MAY | JUN | JUL | AUG | SEP | OCT | NOV | DEC | JAN | FEB | MAR | APR | MAY | JUN | JUL | AUG |
| 2020 Bond Roof Assessments - 5578 | ★ | | | | | | | | | | | | | | | |
| Ainsworth Annex-Re-Roof-5792 | ★ | | | | | | | | | | | | | | | |
| Chavez-Partial Re-Roof-5791 | ★ | | | | | | | | | | | | | | | |
| Duniway - Re-Roof Phase 1 - 5667 | ★ | | | | | | | | | | | | | | | |
| Duniway - Re-Roof Phase II - 55894 | ★ | | | | | | | | | | | | | | | |
| Glencoe-Re-Roof-5790 | ★ | | | | | | | | | | | | | | | |
| Markham-Partial Re-Roof-5896 | ★ | | | | | | | | | | | | | | | |
| Meek - Re-Roof-Bond - 5895 | ★ | | | | | | | | | | | | | | | |
| MLC - 2020 Bond - 5668 | ★ | | | | | | | | | | | | | | | |
| Richmond-Partial Re-Roof-5911 | ★ | | | | | | | | | | | | | | | |
| Rieke - Re-Roof - 5909 | ★ | | | | | | | | | | | | | | | |
| Skyline - Partial ReRoof-5912 | ★ | | | | | | | | | | | | | | | |
| Vernon-Partial Re-Roof-5913 | ★ | | | | | | | | | | | | | | | |
| West Sylvan-Re-Roof-5789 | ★ | | | | | | | | | | | | | | | |
| Winterhaven-Partial ReRoof-5914 | ★ | | | | | | | | | | | | | | | |



PROJECT NOTES

Progress:

- Construction for Ainsworth Annex, Glencoe, MLC PH II, Rieke, and the partial re-roof of Cesar Chavez will take place in summer 2022.
- Procurement of design for 2023 summer roofing projects is in process and will allow for designs to start in summer 2022.
- Duniway Phase II and West Sylvan Re-Roof designs are ongoing and will bid in winter 2022 with construction in summer 2023.

Accomplishments:

- Procurement for summer 2023 design work started ahead of schedule this year, which will allow for longer design period.
- Procurement for construction of summer 2022 projects was successful this year with all roofing projects receiving bids.

Risks:

- - Material pricing and project costs are rising due to continued inflation and high prices on raw materials for projects

2020 Infrastructure: Seismic

May 2022

PPS Team Leads: Robert Jole

Number of Completed Projects: 0

Number of Active Projects: 2

STATUS AT A GLANCE

Legend:

| | |
|--|-----------------------------|
| | As planned: no concerns |
| | Caution: requires attention |
| | Impacts: impacts occurring |

| | As Planned | Caution | Impacts |
|----------|------------|---------|---------|
| Budget | X | | |
| Equity | | X | |
| Schedule | X | | |
| Overall | | X | |

BUDGET

| | BUDGET | | FUNDING | | PROGRESS | | FORECAST | |
|---------------------------------|-----------------|-------------------|-------------------|------------------|--------------------------------|--------------------------|---------------------------|--------------------|
| | Original Budget | Current Budget | Seismic Funds | Other Funds | Actuals To Date (all funds) | Additional Encumbered | Estimate At Completion | Over/Under |
| Unallocated Funds | 17,200,000 | 6,965,291 | 6,965,291 | - | - | - | - | (6,965,291) |
| Creative Science-SRGP-5712-FY21 | - | 7,508,896 | 5,008,896 | 2,500,000 | 469,056 | 5,599,150 | 7,508,896 | - |
| Lent-SRGP-5421-FY21 | - | 7,825,813 | 5,225,813 | 2,600,000 | 5,596,533 | 1,542,196 | 7,825,813 | - |
| 2020 Seismic Totals | | 22,300,000 | 17,200,000 | 5,100,000 | 6,065,590 | 7,141,346 | 15,334,709 | (6,965,291) |

EQUITY

Percent of payments made to Certified owned businesses, percent of labor hours of apprenticeable trades; cumulative

| | MBE | WBE | SDVBE | ESB | N-C | TOTAL | goal | MIN | goal | FEM | goal | APPR | req |
|-------------|-------|--------|-------|-------|-------|---------------|------|-----|------|-----|------|------|-----|
| Consultants | 0.00% | 33.49% | 0.00% | 0.00% | 0.00% | 33.49% | 18% | | | | | | |
| Contractors | 3.68% | 0.00% | 0.00% | 4.52% | 0.00% | 8.20% | 18% | | | | | | |
| Overall | 3.03% | 5.93% | 0.00% | 3.72% | 0.00% | 12.67% | 18% | | | | | | |
| Workforce | | | | | | | | 50% | 25% | 7% | 14% | 16% | 20% |

SCHEDULE

| PROJECT | 2022 | | | | | | | | 2023 | | | | | | | |
|---------------------------------|------|-----|-----|-----|-----|-----|-----|-----|------|-----|-----|-----|-----|-----|-----|-----|
| | MAY | JUN | JUL | AUG | SEP | OCT | NOV | DEC | JAN | FEB | MAR | APR | MAY | JUN | JUL | AUG |
| Creative Science-SRGP-5421-FY21 | ★ | | | | | | | | | | | | | | | |
| Lent-SRGP-5421-FY21 | ★ | | | | | | | | | | | | | | | |

Baseline

Planning

Design

Construction

2020 Infrastructure: Seismic

May 2022

PPS Team Leads: Robert Jole

Number of Completed Projects: 0

Number of Active Projects: 2

PROJECT NOTES

Progress:

- Lent Phase 2 is set to commence June 13, 2022 and last through the summer, with substantial completion approximately 8/19/2022.
- Creative Science Phase 1 is also set to start 6/13. Substantial completion for Phase 1 is scheduled for 8/22/2022, with Phase 2 scheduled for summer 2023.

Accomplishments:

- Lent: The contractor has been able to schedule and perform some fill in work under the building while waiting to start Phase 2 when school lets out for the summer. This last phase is anticipated to go smoothly with minimal material delays due to the ability to field measure and order required finishes during the winter slow time.
- Creative Science: Has been bid and awarded successfully. We have had our preconstruction conference; we have started Owner Architect contractor (meetings); and the contractor has begun the submittal process to avoid delays in receipt of crucial materials.

Risks:

- As with most projects during the pandemic, we remain concerned some materials will not be able to be procured in time to meet substantial completion dates. Nonetheless, we are committed to providing a safe learning environment for the start of the 2023 school year.



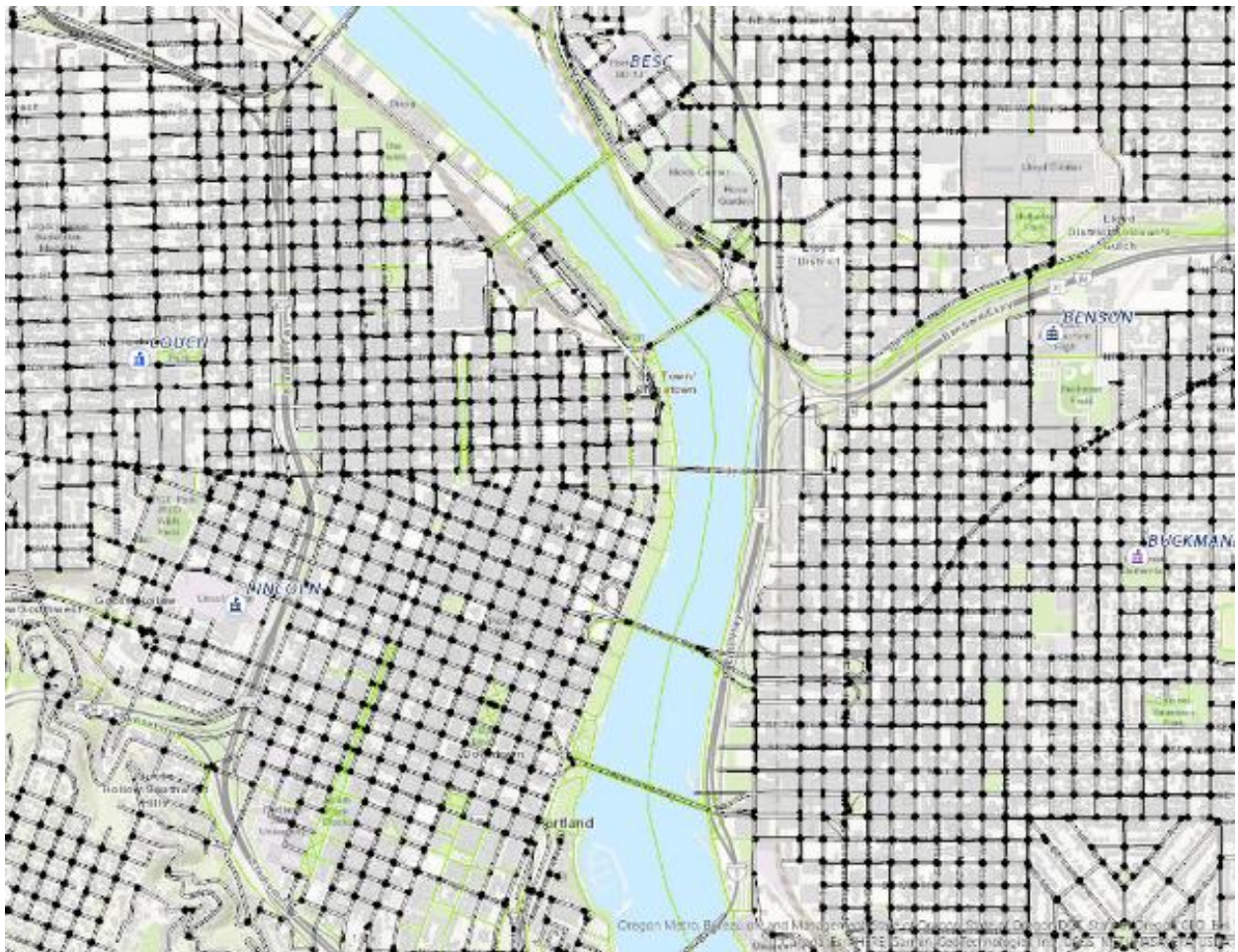
Supplemental Transportation Plan Update Methodology

2022 Supplemental Transportation Plan Update, Portland Public
Schools
June 9, 2022

What is a Supplemental Transportation Plan (STPU)?

- The STPU evaluates and defines hazard zones within 1-mile walk boundaries of elementary schools (grades K-5 and K-8), and 1.5-mile walk boundaries of middle schools (grades 6-8)
- The State reimburses 70% of the approved cost for supplemental transportation costs.
- *Initial* hazard areas are identified by a GIS network model that will be verified through field validation and community outreach

The Network Model and Hazard Zones

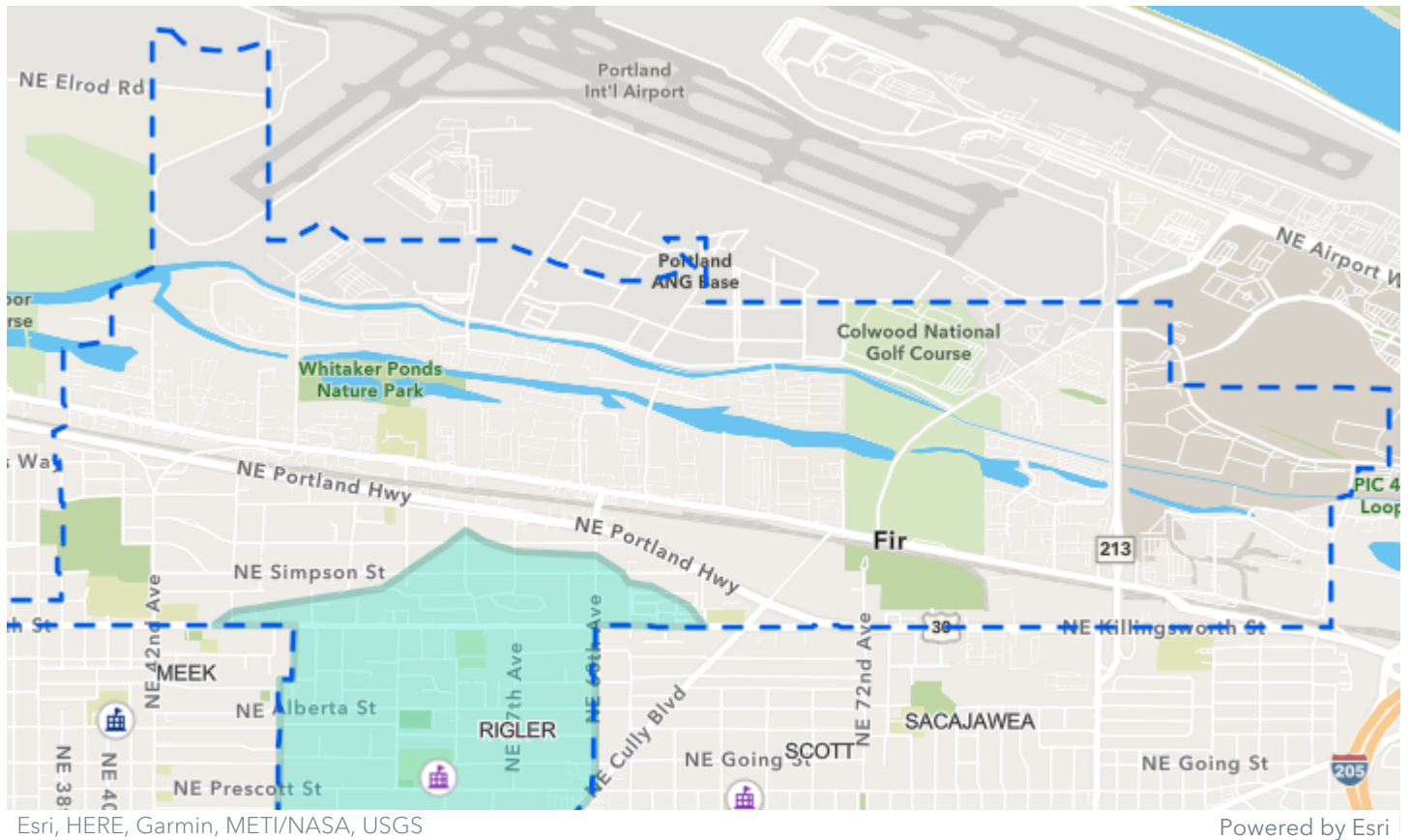


What is a Network model?

A network model is a collection of datasets built from streets, trails, and intersection information with attributes related to infrastructure safety conditions.

A network model calculates all possible routes from one location to another to model real world travel conditions.

Safety as used within this network model is narrowly defined to physical transportation infrastructure hazards. The safety analysis of school walk zone areas weighs heavily on avoiding high speed traffic corridors, [high crash streets and intersections](#), four or more lanes of traffic, and barriers to access such as freeways, light-rail tracks, and railway alignments.

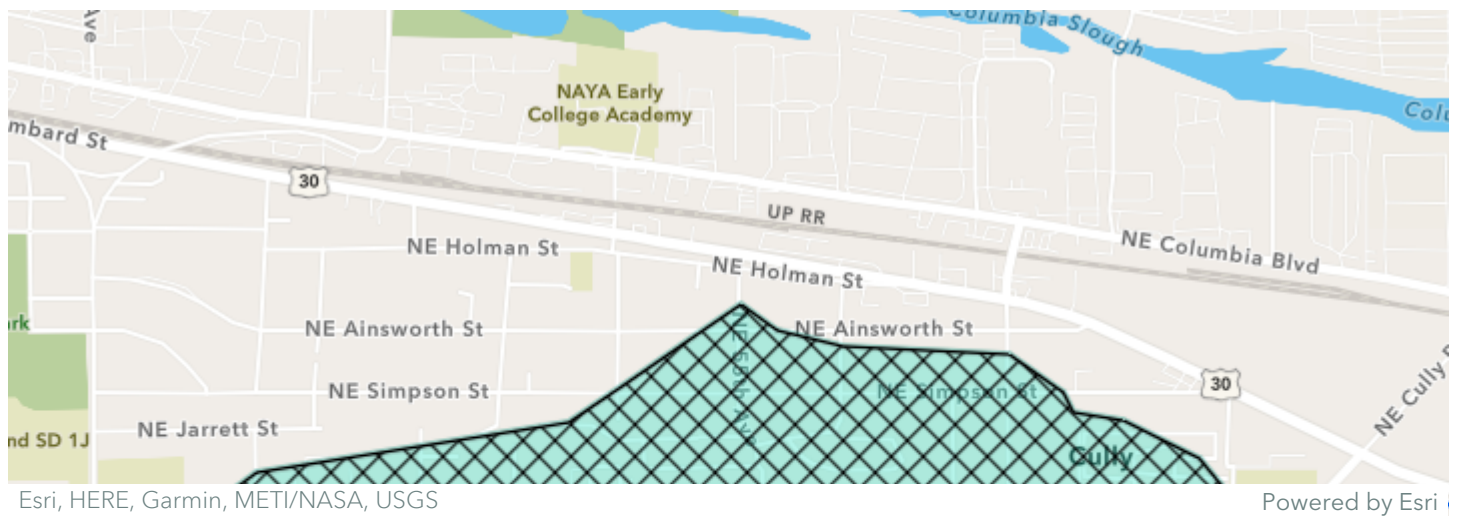


What is a Walk Zone Boundary?

PPS defines a maximum walking distance along streets of 1 mile for elementary and 1 ½ miles for middle school students.

The walk zone area for Rigler Elementary, shown as a **light blue polygon**, shows where students are expected to walk to school in a perfect world.

The school's neighborhood attendance boundary is shown as a dashed **dashed blue line** for context.



What is hazard zone?

A hazard zone is an area within the mapped walk zone boundary where student walking routes to school exceed the distance limit due to hazardous physical barriers.

For example, a student may live within $\frac{3}{4}$ of a mile walking distance from school but their safe walking distance exceeds a mile when the additional distance they walk to access a safe crossing of a busy arterial is taken into account. Their home will be included in the Hazard Zone.

Rigler Elementary's current hazard zone is shown in **black cross-hatching**.



Hazard Zone Criteria for Transportation Infrastructure

The network model is programmed to avoid streets or intersections based on safety considerations.

In the model this algorithm looks like:

Prohibit use of street segments where no sidewalk present and speed limit over 20 mph or high crash corridor designation.



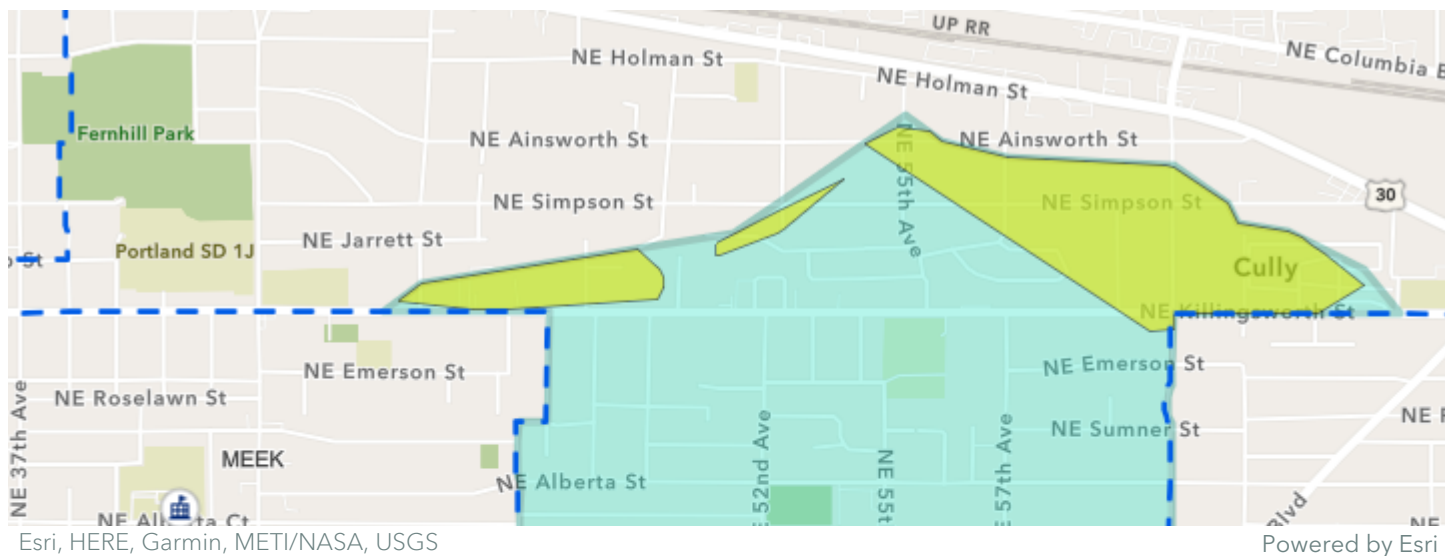
Prohibit Intersection crossings where:

- Speed limit over 20mph and no crossing controls
- Speed limit over 25mph or high crash network street
 - Street is two lanes and a four-way stop or a crossing with a signal and crosswalk is not present
 - Street is more than two lanes and a crossing with a signal and crosswalk is not present



Through the *Safe Routes to School* program, Portland Bureau of Transportation has partnered with PPS to identify streets and intersections near to schools that are unsafe to cross. NE Killingsworth near Rigler Elementary was one of those prioritized.

PBOT installed a new crosswalk with a pedestrian light signal 100 feet south of NE 55th Ave to cross NE Killingsworth St. This allows students to safely cross the street as they walk to Rigler.



Because of PBOT's investment in active transportation improvements, the network model shows a potential reduction in size of the new hazard area, as shown by **yellow polygons**.

Next Steps

1. Prioritization Criteria (June)

60% Equity

- ▶ low-income households
- ▶ communities of color
- ▶ Limited English Proficiency households

Data relating to school neighborhoods

30% Safety

- ▶ speed limit
- ▶ number of traffic lanes
- ▶ whether the street is on the Vision Zero High Crash Network, where more than half of deadly and serious injury crashes occur in Portland.

Data relating to a project location's street characteristics

10% Student/route density

2. Field Validation and Additional Hazard Identification

(Jun-Aug)

3. Community Outreach (Sep-Dec)

4. BOE Decision (March)