REPORT OVERVIEW AND SUMMARY

The Bond Accountability Committee met April 2, 2019 and submits this quarterly report to the Lake Oswego School Board to reflect activity in the timeframe of October 1, 2018 to April 1, 2019. Significant progress has been made toward solidifying the budgets and schedules of the initial projects targeted for phase one of this bond.

The BAC now receives weekly updates from the Bond Team providing a real time overview of successes and challenges. These weekly updates include an overall schedule of the known and targeted schedule milestones.

RECENT ACCOMPLISHMENTS

Similar to last year at this time the Bond Team is working on taking the necessary steps to perform summer work while at the same time managing projects currently underway. The Bond Team has implemented standard protocols for Program Management and Project Management going forward. In addition to standardizing and hopefully streamlining the district’s internal process PMP the Bond Team has also shared examples of quality control is managed on the district projects.

1) LAKERIDGE JUNIOR HIGH SCHOOL:

Design is complete. Plans have been submitted for jurisdictional review. The project has recently cleared significant permit approval milestones. Several governmental approvals still remain with the Bond Team predicting that they will be in possession of all necessary permits in June early 2019.

The contractor has submitted the guaranteed maximum price for the project which has been approved by the Contract Review Board.

Partial demolition has commenced under a separate permit arrangement with the city.

2) UPLANDS / OAK CREEK
Work at Uplands is progressing along with jurisdictional review of Modular buildings in process. Oak Creek’s final estimates are expected soon. Work is scheduled to begin when school gets out in June.

3) **BALANCE OF ACTIVE PROJECTS**

The Bond team continues to progress in incremental ways on the following projects. Some are underway, in various forms, while others are in review and/or planning stages. Hallinan Elementary, Lake Oswego Junior High, River Grove Elementary, Safety and Security Improvements, Tech Infrastructure, Westridge Elementary, Swimming Pool

**GENERAL CONCERNS/NEW ITEMS**

1) **PROJECT BUDGETS AND SCOPE**

The Bond Accountability Committee would like to encourage the board to closely monitor the bond language as well as voter and community expectations. The bond language was broad, even vague, leaving a lot of room for interpretation. The very basic definition of each project should be achieved first before moving on to more acute interests. We encourage a different approach to future bond projects.

More definitive early program project costs to better align with budgets and vice versa. Consultant information like estimates, designs, project scopes and schedules should be critically assessed.

2) **LAKERIDGE JUNIOR HIGH BUDGET**

The BAC worked extensively both with the Bond Team and independently to understand the high cost of construction and consultant services being applied to LJH. While it is our conclusion that the district is getting what they are paying for there may have been other ways to approach the project for different outcomes.

3) **POOL**
While achieving the community’s expectations for the bond across the board is important to the BAC. The pool remains the most difficult project to monitor as it is unclear how the district intends to fulfill the bond language to repair or replace the pool. The BAC has been presented with preliminary budgets and conceptual outside partnerships, but solid footing remains elusive given the initial bond allocation appears to be insufficient. The BAC would like to encourage the board to look at the pool project with a new set of eyes in hopes of finding the most cost-effective way of complying with the bond language. Also, to have a plan in place very soon should the partnership not come to fruition or does not prove to be feasible for various reasons.

Committee Members
Scott Emmett– Chair, Bruce Brown, Jennifer Dale, Kirsten Day, Jeff Fisher, Don Irving, Tom Michie, Sara Pocklington (LOSD Board Member) and Bob Barman (LOSD Board Chair)