



Oregon

Tina Kotek, Governor

Department of Administrative Services
Enterprise Asset Management | Administration Office
1225 Ferry Street SE, U100
Salem, OR 97301-4290
PHONE: 503-378-4092
FAX: 503-373-7210

MEMORANDUM

To: Chris Stewart, Director of Facilities and Support Operations, Oregon State Hospital (OSH)
From: Bill Foster, Chair, Capital Planning Advisory Board (CPAB/Board)
Date: August 20, 2024
Subject: OSH's 2025-27 Agency Facilities Plan Acceptance

Chris,

The Capital Projects Advisory Board (CPAB/Board) has reviewed OSH's 2025-27 facilities plan in accordance with ORS 276.227. Following your Board presentation on August 9th, the Board has **accepted** your plan with the following comments:

- *CPAB appreciates your thorough presentation and recognizes the challenge ahead for developing a comprehensive capital plan for OSH.*

Sincerely,

Bill Foster, Chair

Capital Projects Advisory Board (CPAB)



July 26, 2024

RE: Oregon Health Authority - Oregon State Hospital - 2025-27 Biennial CPAB Memo

Board Chair Foster:

The Oregon State Hospital (OSH) is pleased to present to you its proposed facilities plan for the 2025-27 biennium. This plan supports the facilities in Salem, Junction City, and Pendleton; with a combined area of 1.22M ft², and a combined estimated current replacement value (CRV) of \$685M.

The Peter Courtney Salem Campus consists of 960K ft² of buildings and interior secure perimeter courtyards, and 23 cottages with a CRV of \$495M. The Junction City campus is 230K ft² with a CRV of \$180M. Finally, the Pendleton facility consists of several older buildings with a total combined area of 39K ft², and a current replacement value of \$10M.

OSH strives to achieve the highest standards and outcomes in all aspects of its work. Engaged stewardship of the public trust and public resources includes maintaining OSH's facilities portfolio to the highest standards and investing in regulatory and infrastructure improvements to meet the constantly evolving needs of patients and staff. OSH serves one of the most marginalized populations, Oregonians experiencing mental illness. Maintaining well-kept, safe, and functional treatment environments for Oregonians in need supports OHA's strategic plan to eliminate health inequities by ensuring that all people and communities can achieve optimum physical, mental, and social well-being through partnerships, prevention, and access to quality and affordable health care.

OSH is at a crossroads where its facilities have reached an age where a robust long-term investment strategy is needed to ensure that it can effectively meet OHA's strategic plan to support all Oregonians in need of mental health treatment. For over a decade OSH has had a comprehensive preventative maintenance program and adequate budgetary funding for routine preventative maintenance and capital improvement investments since its two flagship facilities in Salem and Junction city were newly built and brought online in 2011 and 2013, respectively.

With their heavy use as a 24/7 secure mental health services operation, the buildings have reached a point where the lifecycle of many of its building systems have reached a point where capital improvement and capital construction investments are becoming a priority, and deferred maintenance is progressively becoming a consistent challenge. The remaining structures, including the 23 cottages in Salem and the facilities in Pendleton, are much older and more maintenance intensive.

OSH utilizes a computerized maintenance management system to manage all facilities work order requests at its Salem and Junction campuses. OSH has a dedicated team of maintenance staff, varying across many different trades, with most asset PMs routinely performed by in-house trades staff or contractors. This team is also responsible for the management and maintenance of medical equipment.

OSH plans to partner with DAS to adopt a new building management software platform (TRIRIGA, equivalent, or combination of) to support its long-range strategic capital planning objective. OSH also plans to complete the assessments of all its facilities, unfortunately deferred during the 2023-25 biennium, to establish a baseline building condition dataset to support this plan. Upon the successful completion of this project OSH will be better positioned to provide leadership with the data needed to make informed decision in support of OSH's long-term capital improvement and capital construction investment needs.

Another reach goal for the 25-27 biennium; OSH is planning to complete a comprehensive master plan of its Salem facility and grounds. The data gathered will facilitate the updating of the Oregon State Hospital Area Plan and will provide the data and guidance needed to make informed decisions on its long-term programming needs. It is also anticipated that the Junction City Campus will also undergo a programming master plan study.

OSH is not submitting a policy option package for any major capital construction or real property acquisitions for the 2025-27 biennium; however, OSH is requesting \$5,795,000 in capital improvement funding, and \$2,430,000 in deferred maintenance reduction funding; both grouped in the required capital improvement and deferred maintenance reduction policy option package (ORS 291.215). The estimated facilities investment need is \$20M (estimated at 3% of the CRV).

In addition to this request, OSH is also requesting position authorization for two FTE in support of its long-range investment facilities investment strategy.

The Oregon State Hospital appreciates the Board's time, review, and guidance on this submitted plan.

Respectfully,



D. Chris Stewart, P.E.
Director of Facilities and Support Operations

Encl: OSH 2024 CPAB Report
OSH 2024 CPAB Presentation



OREGON HEALTH AUTHORITY
Oregon State Hospital Division
2023-25 Agency Facility Plan
Capital Projects Advisory Board

August 9, 2024

D. Chris Stewart, P.E.
Director of Facilities

AGENCY OVERVIEW

MISSION

- The Oregon State Hospital serves one of the most marginalized populations in Oregon, individuals experiencing mental illness. Maintaining well functional treatment environments for Oregonians in need supports the Oregon Health Authority's strategic plan to eliminate health inequities by providing people and communities can achieve optimum physical, mental, and social well-being through partnerships, prevention, and access to quality and care.
- Its mission is to provide therapeutic, evidence-based, patient-centered treatment focusing on recovery and community reintegration in a safe environment.
- It serves more than 1,500 people per year and employs more than 2,000 staff.

PORTFOLIO

- The Oregon State Hospital (OSH) operates under the direction of the Oregon Health Authority . The Peter Courtney Salem Campus has the capacity to serve 620 people at a time, and the Junction Campus can serve up to 174.
- Pendleton Cottage is a residential care facility in Pendleton, Oregon and has 16 beds

SIZE

- Portfolio
 - CRV > 1M | Area → 1.22M ft² | CRV → \$671M
 - CRV < 1M | Area → 60K ft² | CRV → \$14M

FUNDING

- 95.1% GF | 1.6% OF | 3.3% FEDERAL

PETER COURTNEY SALEM CAMPUS



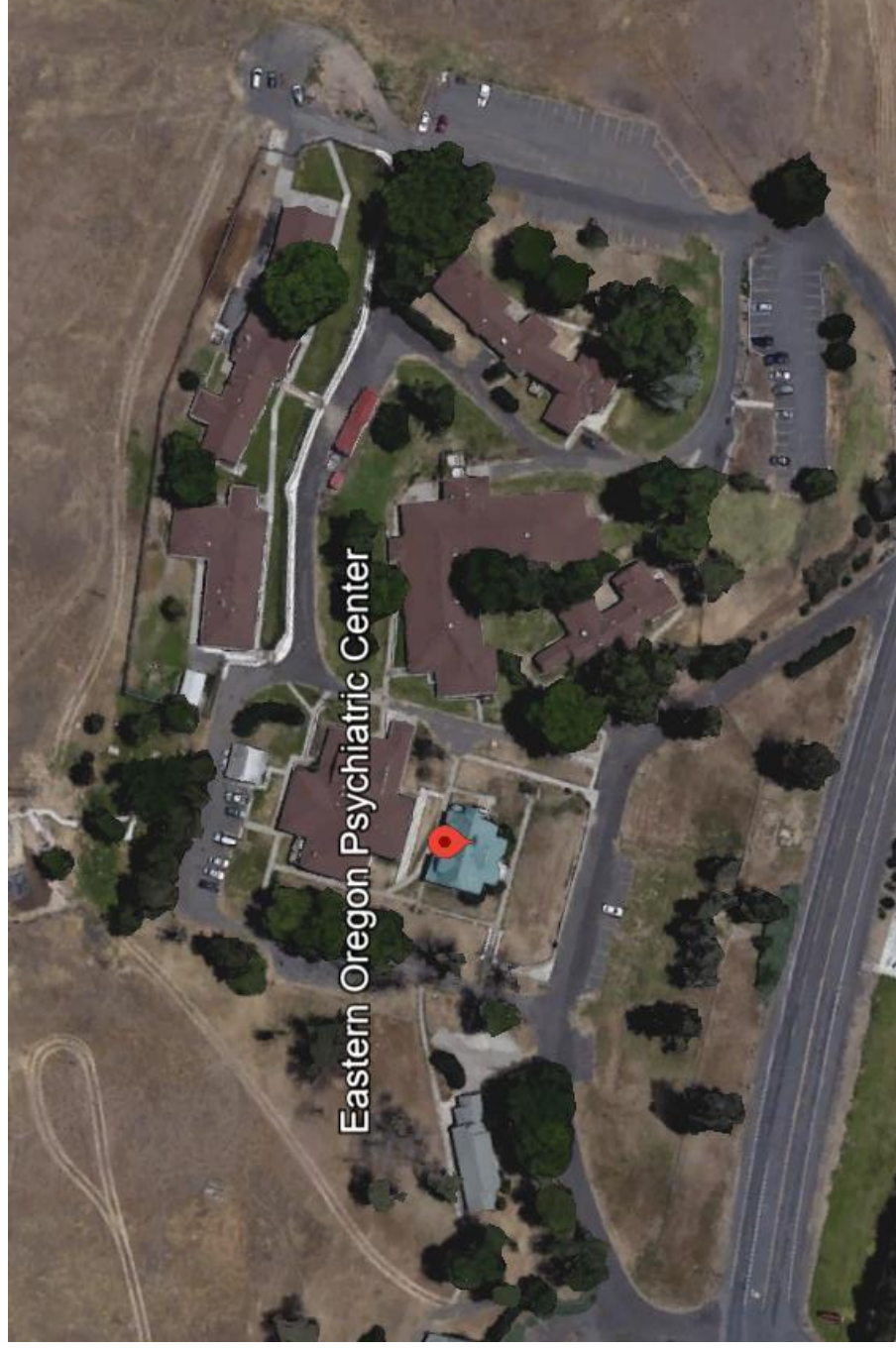
PETER COURTNEY SALEM CAMPUS



JUNCTION CITY CAMPUS



PENDLETON CAMPUS



PLANNING FACTORS

CURRENT CONDITION

- OSH has reached a crossroads where its facilities have aged to the point where a robust long-term investment strategy is that it can effectively meet OHA's strategic plan to support all Oregonians in need of mental health treatment.

PROPOSED INVESTMENTS

- The 25/27 policy option package being proposed, minimal at best, supports OSH needs in the interim to ensure business reduce long term escalation in capital outlay as building systems are added to the deferred maintenance backlog.

FACILITIES INVESTMENTS	
Capital Improvement	\$ 5,795,000
Deferred Maintenance	\$ 2,430,000
TOTAL FACILITY INVESTMENTS	\$ 8,225,000
Two FTE	\$ 409,250
TOTAL INVESTMENTS	\$ 8,634,250

FACILITY STRATEGIES

EMERGENT ISSUES

- Aging building systems.
- Increased demand on the facilities.
- Increase in the wear and tear of the facilities due to the acuity and severity of symptoms of the patients admitted.

BUSINESS TREND | PROGRAM DELIVERY CHANGES

- Increase in demand for inpatient care services.
- The occupancy of the hospital is primarily determined by the judicial system.
- Periodic legal decisions will impact the number and commitment type of patients to be admitted to OSH.
- Depending on the changes in law, this can drive an increase or decrease to the facility demand, partially determined by the level of care required for new patient admissions and the associated adaptation of existing hospital space.

STRATEGIC OPPORTUNITIES

- Building condition assessments.

MASTER PLAN CONCEPTS

- Peter Courtney Salem Campus
 - Program Master Planning
 - Area Plan Update
- Junction City Campus
 - Program Master Planning
- Pendleton Campus
 - Program Master Planning

RISK/CLIMATE CHANGE MITIGATION

- Investing in HVAC upgrades to mitigate wildland fire affecting facility air quality.
- Investing in sustainable building system upgrades as replacements come due.
- Emergency management to support resilient recovery.

FACILITY INVESTMENTS

2025 - 27 DEFERRED MAINTENANCE INVESTMENTS

LOCATION	DETAILS	
Salem Campus Facility	Roof replacements (18 Cottages)	\$
Salem Campus Facility	Siding replacement and repainting (20 Cottages)	\$
Salem Campus Facility	Asphalt recoating and restriping	\$
Salem Campus Facility	HVAC (Cooling tower wet deck media)	\$
Junction Campus Facility	Asphalt recoating and restriping	\$
Pendleton Campus Facility	Asphalt Replacement	\$
	TOTAL	\$

FACILITY INVESTMENTS

2025 - 27 CAPITAL IMPROVEMENT INVESTMENTS

LOCATION	DETAILS	
Salem Campus	Addition of a 2 nd floor in the Vocational Services Program – adds 32 workspaces	\$
Salem Campus	Public announcement system upgrade	\$
Salem Campus	Space improvements	\$
Junction City Campus	HVAC improvements - air handler enhancements	\$
Junction City Campus	Generator (backup) switchgear modifications	\$
Junction City Campus	Space improvements	\$
	TOTAL	\$

NEXT STEPS

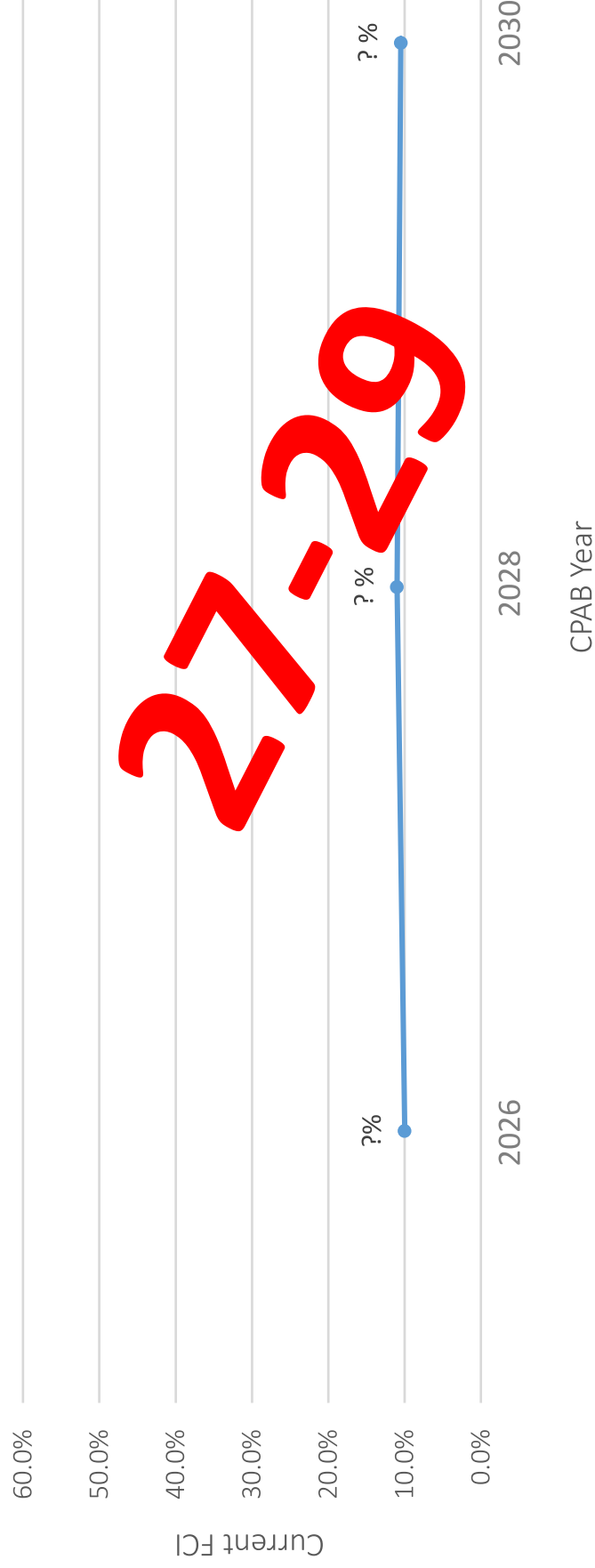
Building Assessments

Master Planning

Baseline Building Dataset Development

FACILITY CONDITION

Portfolio Facility Condition Index (FCI)



FACILITY PLAN SUMMARY

AGENCY PLAN SUMMARY	DM/LIFE SAFETY (PRIORITY 1)	CAPITAL RENEWAL (PRIORITY 2)	CAPITAL RENEWAL (PRIORITY 3)	SEISMIC/RISK (PRIORITY 4)	MODERNIZATION (NET PRIORITY 5)
DM/CR	\$0	\$0	\$0	\$0	\$0
Resilience/Risk	\$0	\$0	\$0	\$0	\$0
Modernization	\$0	\$0	\$0	\$0	\$0
Total	\$0	\$0	\$0	\$0	\$0

27-29

THANK YOU

Facility Plan - Maintenance Priority 1-4
2025-27 Biennium

Agency Name **Oregon Health Authority (OHA) | Oregon State Hospital (OSH)**

10 Year Maintenance Priority 1-4 for Owned Assets Over \$1M CRV

Campus	Building ID	Building Name	Plan Data (incl Soft Costs)				Current Replacement Value	Priority 1 - Critical Life Safety, DM Code (Seismicity) Priority 2 - Priority 3 - Potentially Exceeds Term Capital Renewal, Functionality	Priority 4 - Seismic Hazard Remediation (if applicable)	Priority 5 - Not Yet Critical (Mid-term)	Priority 6 - Seismic Hazard Remediation (if applicable)	Total (G+H+I+J)	Current FCP less Seismic Net Haz (G+H+I) F	Agency Input				
			Construction Year	Gross Square Footage	Current Replacement Value	Calculated Replacement Value								2023-25 LAB Approved	2025-27 Budget	Remaining 10 Year Need	FCP Columns K-L-M	
OSH - Pendleton Cottage	2781	EOTC - Building C-16 Bed Residence		5,838	\$	2,390,767						0.000%	\$	-	\$	-	\$	-
OSH - Junction City	3383	JC Cottage 3		0	\$	1,580,103						0.000%	\$	-	\$	-	\$	-
OSH - Junction City	3382	JC Main Building		229,816	\$	174,775,121						0.000%	\$	-	\$	-	\$	-
OSH - Salem	309443	Master Pool - 805	1999	4,800	\$	2,282,259						0.000%	\$	-	\$	-	\$	-
OSH - Salem	3592	Cottage 02	1909	4,609	\$	2,552,152						0.000%	\$	-	\$	-	\$	-
OSH - Junction City	3381	JC Cottage 1		0	\$	1,779,273						0.000%	\$	-	\$	-	\$	-
OSH - Junction City	3380	JC Cottage 2		0	\$	1,967,265						0.000%	\$	-	\$	-	\$	-
OSH - Pendleton Cottage	2785	EOTC - Building E 32-bed residence (E)		11,413	\$	2,088,220						0.000%	\$	-	\$	-	\$	-
OSH - Salem	3584	Cottage 08	1945	51,344	\$	1,471,137						0.000%	\$	-	\$	-	\$	-
OSH - Salem	3599	Physical Plant - Building 63	1929	33,592	\$	4,983,611						0.000%	\$	-	\$	-	\$	-
OSH - Salem	3588	Cottage 01	1901	3,300	\$	2,605,262						0.000%	\$	-	\$	-	\$	-
OSH - Salem	3602	Cottage 07	1942	2,000	\$	1,445,036						0.000%	\$	-	\$	-	\$	-
OSH - Salem	3606	Cottage 06	1941	2,900	\$	2,221,111						0.000%	\$	-	\$	-	\$	-
OSH - Salem	3609	Salem Campus Main Building	2011	812,988	\$	464,976,153						0.000%	\$	-	\$	-	\$	-
OSH - Salem	3610	Cottage 05	1940	2,500	\$	2,278,240						0.000%	\$	-	\$	-	\$	-
OSH - Pendleton Cottage	2775	EOTC - Building D-16 bed Residence		4,707	\$	1,850,347						0.000%	\$	-	\$	-	\$	-
Subtotal Over \$1M CRV				1,169,217	\$	671,245,077						0.000%	\$	-	\$	-	\$	-

Maintenance Priority 1-4 for Owned Assets Under \$1M CRV (Optional) - This is not required for the budget submission or CPAR Report. Agencies may choose to complete.

Campus	Building ID	Building Name	Plan Data (incl Soft Costs)				Current Replacement Value	Priority 1 - Critical Life Safety, DM Code (Seismicity) Priority 2 - Priority 3 - Potentially Exceeds Term Capital Renewal, Functionality	Priority 4 - Seismic Hazard Remediation (if applicable)	Priority 5 - Not Yet Critical (Mid-term)	Priority 6 - Seismic Hazard Remediation (if applicable)	Leave Blank	Total (G+H+I+J)	Current FCP less Seismic Net Haz (G+H+I) F	Agency Input			
			Construction Year	Gross Square Footage	Current Replacement Value	Calculated Replacement Value									2023-25 LAB Approved	2025-27 Budget	Remaining 10 Year Need	FCP Columns K-L-M
OSH - Pendleton Cottage	2775	EOTC - Garage 112 garage (N)		575	\$	13,935						0.0%	\$	-	\$	-	\$	-
OSH - Pendleton Cottage	2778	EOTC - Building B 10- bed residence (D)		5,090	\$	1,074,093						0.0%	\$	-	\$	-	\$	-
OSH - Pendleton Cottage	2782	EOTC - Garage 108 (I)		528	\$	14,339						0.0%	\$	-	\$	-	\$	-
OSH - Pendleton Cottage	2783	EOTC - 109		1	\$	42,520						0.0%	\$	-	\$	-	\$	-
OSH - Pendleton Cottage	2784	EOTC - Building 106 garage Maintenance shop		264	\$	16,341						0.0%	\$	-	\$	-	\$	-
OSH - Pendleton Cottage	2777	EOTC - Building P generator building		1,672	\$	45,647						0.0%	\$	-	\$	-	\$	-
OSH - Pendleton Cottage	2776	EOTC - Building A 10-bed residence (C)		3,234	\$	804,613						0.0%	\$	-	\$	-	\$	-
OSH - Pendleton Cottage	2774	EOTC - 950		1	\$	464,121						0.0%	\$	-	\$	-	\$	-
OSH - Pendleton Cottage	2780	EOTC - FVBuilding 8 House 108		1	\$	254,848						0.0%	\$	-	\$	-	\$	-
OSH - Salem	3597	Cottage 14	1951	2,160	\$	535,943						0.0%	\$	-	\$	-	\$	-
OSH - Salem	3615	Cottage 16	1941	2,000	\$	541,841						0.0%	\$	-	\$	-	\$	-
OSH - Salem	3614	Cottage 03	1958	3,000	\$	364,312						0.0%	\$	-	\$	-	\$	-
OSH - Salem	3612	Cottage 23	1928	2,840	\$	535,214						0.0%	\$	-	\$	-	\$	-
OSH - Salem	3611	Building 93 - Cremains	1896	2,300	\$	874,503						0.0%	\$	-	\$	-	\$	-
OSH - Salem	3605	Cottage 17	1952	2,200	\$	596,610						0.0%	\$	-	\$	-	\$	-
OSH - Salem	3604	Cottage 15	1952	2,300	\$	581,992						0.0%	\$	-	\$	-	\$	-
OSH - Salem	3601	Cottage 11	1951	2,300	\$	570,459						0.0%	\$	-	\$	-	\$	-
OSH - Salem	3589	Cottage 18	1954	1,825	\$	569,082						0.0%	\$	-	\$	-	\$	-
OSH - Salem	3598	Cottage 13	1951	2,300	\$	546,792						0.0%	\$	-	\$	-	\$	-
OSH - Salem	3585	Cottage 22		3,010	\$	570,467						0.0%	\$	-	\$	-	\$	-
OSH - Salem	3596	Cottage 10	1948	2,000	\$	552,403						0.0%	\$	-	\$	-	\$	-
OSH - Salem	3595	Cottage 21	1958	2,300	\$	585,900						0.0%	\$	-	\$	-	\$	-
OSH - Salem	3594	Cottage 20	1956	2,300	\$	595,543						0.0%	\$	-	\$	-	\$	-
OSH - Salem	3593	Cottage 12	1951	2,000	\$	547,165						0.0%	\$	-	\$	-	\$	-
OSH - Salem	3591	Cottage 04		2,500	\$	532,947						0.0%	\$	-	\$	-	\$	-
OSH - Pendleton Cottage	2773	EOTC - Building MP multi purpose (L)		6,169	\$	987,503						0.0%	\$	-	\$	-	\$	-
OSH - Salem	3581	Cottage 19	1958	2,300	\$	581,319						0.0%	\$	-	\$	-	\$	-
OSH - Salem	3600	Cottage 09	1946	2,300	\$	532,795						0.0%	\$	-	\$	-	\$	-
Subtotal Under \$1M CRV				59,367	\$	13,840,516						0.0%	\$	-	\$	-	\$	-

Definitions		
Current Maintenance Priority 1-4	1	Current costs for all facility maintenance and deferred maintenance except those that are covered in operations and maintenance budgets (routine maintenance).
Construction Year	2	Original Construction Year
Current Replacement Value	3	Current Replacement Value Reported to Risk Management or Calculated Replacement Value Reported from Facility Conditions Assessment (FCA)
Priority One: Currently Critical	4	From the Budget Instruction: Priority One projects are conditions that require immediate action in order to address code and accessibility violations that affect life safety. Building envelope issues (roof, sides, windows and doors) that pose immediate safety concerns should be included in this category.
Priority Two: Potentially Critical	5	From the Budget Instruction: Priority Two projects are to be undertaken in the near future to maintain the integrity of the facility and accommodate current agency program requirements. Included are systems that are functioning improperly or at limited capacity, and if not addressed, will cause additional system deterioration and added repair costs. Also included are significant building envelope issues (roof, sides, windows and doors) that, if not addressed, will cause additional system deterioration and added repair costs.
Priority Three: Necessary - Not yet Critical	6	From the Budget Instructions: Priority Three projects could be undertaken in the near to mid-term future to maintain the integrity of a building and to address building systems, building components and site work that have reached or exceeded their useful life based on industry standards, but are still functioning in some capacity. These projects may require attention currently to avoid deterioration, potential downtime and consequently higher costs if corrective action is deferred.
Priority Four: Seismic and Natural Hazard Remediation	7	From the Budget Instructions: Priority Four projects improve seismic performance of buildings constructed prior to 1985 building code changes to protect occupants, minimize building damage and speed recovery after a major earthquake. Projects also include those that mitigate significant flood hazards.
Facility Condition Index	8	A calculated measure of facility condition relative to its current replacement value (expressed as a percentage)

Oregon Health Authority (OHA) | Oregon State Hospital (OSH)

Agency Name

Current Maintenance Priority 5¹ for Owned Assets Over \$1M CRV

iPlan Data (Incl Soft Costs)

Campus	Building ID	Building Name	Construction Year	Gross Square Footage	Current Replacement Value ² (Calculated)	Modernization Estimate	Notes/Description
A	B	C	D	E	F	G	H
OSH - Pendleton Cottage	2781	EOTC - Building C-16 Bed Residence	0	5,838	\$ 2,390,767	\$ -	
OSH - Junction City	3383	JC Cottage 3	0	-	\$ 1,580,103	\$ -	
OSH - Junction City	3382	JC Main Building	0	-	\$ 174,775,121	\$ -	
OSH - Salem	309443	Motor Pool - S05	1999	4,800	\$ 2,282,259	\$ -	
OSH - Salem	3592	Cottage 02	1909	4,609	\$ 2,552,152	\$ -	
OSH - Junction City	3381	JC Cottage 1	0	-	\$ 1,779,273	\$ -	
OSH - Junction City	3380	JC Cottage 2	0	-	\$ 1,967,285	\$ -	
OSH - Pendleton Cottage	2785	EOTC - Building E 32-bed residence (E)	0	11,413	\$ 2,088,220	\$ -	
OSH - Salem	3584	Cottage 08	1945	2,160	\$ 1,471,137	\$ -	
OSH - Salem	3599	Physical Plant - Building 63	1929	33,592	\$ 4,983,611	\$ -	
OSH - Salem	3588	Cottage 01	1901	3,300	\$ 2,605,262	\$ -	
OSH - Salem	3602	Cottage 07	1942	2,000	\$ 1,445,036	\$ -	
OSH - Salem	3606	Cottage 06	1941	2,900	\$ 2,221,111	\$ -	
OSH - Salem	3609	Salem Campus Main Building	2011	812,398	\$ 464,976,153	\$ -	
OSH - Salem	3610	Cottage 05	1940	2,500	\$ 2,278,240	\$ -	
OSH - Pendleton Cottage	2775	EOTC - Building D-16 bed Residence	0	4,707	\$ 1,850,347	\$ -	
Subtotal Over \$1M CRV				890,217	\$ 671,246,077	\$	

TBD (27-29 Biennium)

Definitions

Priority Five: Modernization	1	From the Budget Instructions: Priority Five projects are alterations or replacement of facilities solely to implement new or higher standards to accommodate new functions, significantly improve existing functionality as well as replacement of building components that typically last more than 50 years (such as the building structure or foundations). These standards include system and aesthetic upgrades represent sensible improvements to the existing condition. These projects improve the overall usability and reduce long-term maintenance requirements. Given the significant nature of these projects, typically addresses deficiencies that do not conform to current codes, but are 'grandfathered' in their existing condition to the extent feasible.
Construction Year	2	Original Construction Year
Current Replacement Value	3	Current Replacement Value Reported to Risk Management or Calculated Replacement Value Reported from Facility Conditions Assessment (FCA)

ESTIMATED MAINTENANCE LOAD (3% CRV) \$ 20,137,382

Agency Input

<p>Agency Name</p> <p>Oregon Health Authority (OHA) Oregon State Hospital (OSH)</p>	<ol style="list-style-type: none"> <p>1. What are the key drivers for your agency's facility needs, and how do you measure space/facility demand?</p> <ul style="list-style-type: none"> The Oregon State Hospital is subject to standards determined by the Centers for Medicaid and Medicare Services (CMS) and reviewed and accredited through the Joint Commission on Accreditation of Healthcare Organizations (JCAHO). In addition to applying best management practices and standards for the maintenance/repair/replacement of buildings and equipment, the hospital is required to meet more stringent facilities requirements as determined by the CMS and JCAHO governing bodies. The occupancy of the hospital is primarily determined by the judicial system. Periodic legislative changes will impact the types and quantities of patients to be admitted to OSH. Depending on the changes in law, this can drive an increase or decrease to the facility demand, partially determined by the level of care required for new patient admissions and the associated adaptation of existing hospital space. Occupancy requirements and needs are dynamic. The measurement of space is completed through monitoring of legislative and regulatory requirements, with associated increases or decreases to staffing dependent on shifting requirements and the <p>2. What are the key facility-related challenges over the next 10-years? (Please answer in order of priority)</p> <ul style="list-style-type: none"> Increase demand in patient services. Above average use/wear of building systems due to the 24/7 operations schedule and hospital operations environment. Keeping up with the demand for hospital services programming. Deferred maintenance: the replacement of building systems and equipment that have met their useful life. Responding to regulatory changes requiring facility improvements. The need for the development of a long-term strategic planning framework. Above standard wear and tear of a facility partially occupied by persons not invested in long term facility care. Emergency management and resiliency planning. <p>3. What do you need to meet these challenge</p> <ul style="list-style-type: none"> Completing a statewide building assessment of all OSH facilities; including Salem, Junction City, and Pendleton. Introducing a software platform (TRIRIGA or equal) to provide long-term strategic capital planning data. Updating the Oregon State Hospital Area Plan (125-125-0350). Completing a master plan for the Oregon State Hospital facility (including the cottages).
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Facility Plan - Facility Summary Report 107BF16a

2025-27 Biennium

Agency Name

Oregon Health Authority (OHA) | Oregon State Hospital (OSH)

Table A: Owned Assets Over \$1M CRV

	FY 2024 DATA	
Total Number of Facilities Over \$1M	16	
1 Current Replacement Value \$ (CRV)	\$ 671,246,077	4 Source
Total Gross Square Feet (GSF)	1,169,217	5 Estimate/Actual
2 Office/Administrative Usable Square Feet (USF)	675,451	6 Office/Admin USF/PC
3 Occupants Position Count (PC)	1,751	7 or Agency Measure

4 Risk of F

5 73% % USF/G

6 JCAHO (see note below)

Table B: Owned facilities under \$1M CRV

Number of Facilities Under \$1M	28
1 CRV	\$ 13,940,516
Total Gross Square Feet (GSF)	59,367

OSH is regulated by the Joint Commission on Accreditation of Healthcare Organizations (JCAHO). Agency USF measures are the number of beds and average daily positions.

Table C: Leased Facilities

8 Total Rented SF	0	5 % USF/G
Total 2023-25 Biennial Lease Cost	\$ -	6
9 Additional 2023-25 Costs for Lease Properties (O&M)	0	Estimate/Actual
2 Office/Administrative Usable Square Feet (USF)	0	Office/Admin USF/PC
3 Occupants Position Count (PC)	0	

Definitions

1 CRV	Current Replacement Value Reported to Risk Management or Calculated Replacement Value Reported
2 USF	Conditions Assessment (FCA)
3 Occupant Position Count (PC)	Usable Square Feet per BOMA definition for office/administrative uses. Area of a floor occupiable by a tenant are normally housed plus building amenity areas that are convertible to occupant area and not required by building. If not known, estimate the percentage.
4 Source	Total Legislatively Approved Budget (LAB) Position Count within the buildings or leases as applicable.
5 Estimate/Actual	Enter Source of CRV as "Risk" or "FCA"
6 Office/Administrative USF/PC	Use actual USF % of USF to GSF, if available. If not known, estimate the percentage.
7 Agency Measure	Divide your USF by your position count. If office/admin space is a less than 10% of your space use, fill in N Measure".
	If not using USF/PC, insert Agency Measure as defined in 107BF02 question #1.

RSF	8	Rentable SF per BOMA definition. The total usable area plus a pro-rated allocation of the floor and building building.
O&M	9	Total Operations and Maintenance Costs for facilities including all maintenance, utilities and janitorial

Agency Name

Oregon Health Authority (OHA) | Oregon State Hospital (OSH)

Facilities Operations and Maintenance (O&M) Budget excluding Capital Improvements and Deferred Maintenance

Personal Services (PS) Operations and Maintenance
Services and Supplies (S&S) Operations and Maintenance
Utilities not included in PS and S&S above
Total O&M
O&M \$/SF

	2021-23 Actual	2023-25 LAB	2025-27 Estimated	2027-29 Estimated
\$	13,873,021	\$ 14,940,668	\$ 17,725,956	\$ 18,396,219
\$	4,219,919	\$ 3,695,019	\$ 3,850,210	\$ 4,011,919
\$	3,708,322	\$ 4,008,255	\$ 4,176,602	\$ 4,352,019
\$	21,801,262	\$ 22,643,942	\$ 25,752,768	\$ 26,760,157
	18.65	19.37	22.03	22.89

Total O&M SF

1,169,217

Include only the SF for which your agency provides O&M funding.

O&M Estimated Fund Split Percentage %

General Fund	Lottery Fund	Other Funds	Federal Funds
95%		2%	3%

Deferred Maintenance Funding In Current Budget Model

Total Short and Long Term Deferred Maintenance Plan for Facilities

Priorities 1-3 - Currently, Potentially and Not Yet Critical
Priority 4 - Seismic & Natural Hazard
Priority 5 - Modernization

Total Priority Need
Facility Condition Index (Priority 1-3 Needs/CRV)

2025-27 Biennium	Ongoing Budgeted (non POP)	Ongoing Budgeted (non POP)
Current Costs 2024	2025-27 Budgeted SB 1067 (2% CRV min.)	2027-29 Projected SB 1067 (2% CRV min.)
4,5,6 \$17,326,312	\$15,355,356	\$10,343,356
7 \$0	\$0	\$0
8 \$0	\$0	\$0
9 \$17,326,312	\$15,355,356	\$10,343,356
	TBD (27-29 Biennium)	

Assets CRV

\$0

Current Replacement Value Reported to Risk or Calculated Replacement Value Reported from Facility Conditions Assessment (FCA)

Process/Software for routine maintenance (O&M)
Process/Software for deferred maintenance/renewal
Process for funding facilities maintenance

zLink Maintenance and Work Order Software	Provide narrative
zLink Maintenance and Work Order Software	Provide narrative
Contained within the Oregon State Hospital Budget	Provide narrative

From iPlan FCA

Definitions

Facilities Operations and Maintenance Budget	The Facilities Operations and Maintenance budget includes costs to operate and maintain facilities and keep them in repair including utilities, janitorial and maintenance costs. Maintenance costs are categorized as external building (roof, siding, windows, etc.); interior systems (electrical, mechanical, interior walls, doors, etc.); roads and ground (groundskeeper, parking lots, sidewalks, etc.) and centrally operated systems (electrical, mechanical, etc.). Agencies with significant facilities may include support staff if directly associated with facilities maintenance activities. Do not include other overhead costs such as accounting, central government charges, etc.
O&M Estimated Fund Split Percentage %	Show the fund split by percentage of fund source allocated to facility O&M for your agency

<p>Total Short and Long Term Maintenance and Deferred Maintenance Plan for Facilities Value Over \$1M</p>	<p>3</p>	<p>All Maintenance excluding routine O&M costs. 23-25 and 25-27 auto-populates with 2% of the sum of your agency portfolio's CRV. Written to deliver on SB 1067: SECTION 9. (1) Each biennium, the Governor shall propose as part of the Governor's recommended budget an amount for deferred maintenance and capital improvements on existing state-owned buildings and infrastructure that is equivalent to at least two percent of the current replacement value of the state-owned buildings and infrastructure.</p>
<p>Priority One: Currently Critical</p>	<p>4</p>	<p>From the Budget Instruction: Priority One projects are conditions that require immediate action in order to address code and accessibility violations that affect life safety. Building envelope issues (roof, sides, windows and doors) that pose immediate safety concerns should be included in this category.</p>
<p>Priority Two: Potentially Critical</p>	<p>5</p>	<p>From the Budget Instruction: Priority Two projects are to be undertaken in the near future to maintain the integrity of the facility and accommodate current agency program requirements. Included are systems that are functioning improperly or at limited capacity, and if not addressed, will cause additional system deterioration and added repair costs. Also included are significant building envelope issues (roof, sides, windows and doors) that, if not addressed, will cause additional system deterioration and added repair costs.</p>
<p>Priority Three: Necessary - Not yet Critical</p>	<p>6</p>	<p>From the Budget Instructions: Priority Three projects could be undertaken in the near to mid-term future to maintain the integrity of a building and to address building systems, building components and site work that have reached or exceeded their useful life based on industry standards, but are still functioning in some capacity. These projects may require attention currently to avoid deterioration, potential downtime and consequently higher costs if corrective action is deferred.</p>
<p>Priority Four: Seismic and Natural Hazard Remediation</p>	<p>7</p>	<p>From the Budget Instructions: Priority Four projects improve seismic performance of buildings constructed prior to 1995 building code changes to protect occupants, minimize building damage and speed recovery after a major earthquake. Projects also include those that mitigate significant flood hazards.</p>
<p>Priority Five: Modernization</p>	<p>8</p>	<p>From the Budget Instructions: Priority Five projects are alterations or replacement of facilities solely to implement new or higher standards to accommodate new functions, significantly improve existing functionality as well as replacement of building components that typically last more than 50 years (such as the building structure or foundations). These standards include system and aesthetic upgrades which represent sensible improvements to the existing condition. These projects improve the overall usability and reduce long-term maintenance requirements. Given the significant nature of these projects, the work typically addresses deficiencies that do not conform to current codes, but are 'grandfathered' in their existing condition to the extent feasible.</p>
<p>Facility Condition Index</p>	<p>9</p>	<p>A calculated measure of facility condition relative to its current replacement value (expressed as a percentage)</p>

Facility Plan - Major Construction/ Acquisition Project Narrative 107BF11

2025-27 Biennium Agency Name **Oregon Health Authority (OHA) | Oregon State Hospital (OSH)**

Note: Complete a separate form for each project

Agency	Oregon Health Authority (OHA) Oregon State Hospital (OSH)			Schedule
Project Name	None	Cost Estimate	Cost Est. Date	Est. Comp
Address /Location	2600 Center St NE, Salem, OR 97301	\$ -		
		GSF	# Stories	Land Use/Zoning Satisfied
				Y

Funding Source/s: Show the distribution of dollars by funding source for the full project cost.	General Funds	Lottery	Other	Fed
	100			

Description of Agency Business/Master Plan and Project Purpose/Problem to be Corrected

The hospital has identified an administrative and program staff space shortage and have had to move staff and programs to the cottages on campus and have identified future needs requiring additional staff space.

Project Scope and Alternates Considered

OSH is at a crossroads where its facilities have reached an age where a robust long-term investment strategy is needed to ensure that it can effectively meet OHA's strategic plan support all Oregonians in need of mental health treatment. This policy option package provides the support OSH needs in the interim to ensure business continuity, and to reduce term escalation in capital outlay as building systems are added to the deferred maintenance backlog.

This investment is part of an over-arching long-term strategic facilities investment plan to ensure that OSH's strategic plan can be realized and managed in perpetuity, especially facilities and site systems are aging. The investments that are submitted via this policy package are one part of a multi part planning effort to ensure that all of OSH's facilities are ready and to ensure uninterrupted business continuity.

This long-term capital planning objective is to adopt a facilities portfolio management system that will provide a dynamic facilities condition index as a measuring metric to support decision making as investments in minor, major, capital improvement, and capital construction projects load continuously increase, and to ensure business continuity and adapt needs are supported.

The maintenance projections that are created by the Facilities Program are based on a tracked metric called the Facility Condition Index (FCI). The FCI is a standard facility maintenance benchmark that is used to objectively assess the current and projected condition of a building asset and provide a means for comparisons of facility or building conditions, as well as allowing for renewal funding needs and comparisons. The FCI is the ratio of current year required renewal cost to current building replacement value, or in other words, a calculated measure of facility condition relative to its current replacement value expressed as a percentage. Based on this index, a structure's condition can be ranked as Good (0-5% FCI).

10%), Poor (>10%) or Very Poor (>60%). An FCI of 60% or greater usually indicates that the structure should be replaced rather than renewed.

The fundamental drivers of this plan include:

- Effective long-range capital planning for maximizing the use and value of our facilities via a consistent 10-year planning vision.
- Being good stewards of our investments: this is where public investments are properly maintained to ensure occupant safety, being nimble as programming needs change or and the reduction of long-term operating costs.
- Designing for quality: good building design contributes to higher employee productivity and adaptability and enhanced public service.
- Right sizing our portfolio: sustainability and resiliency being very high priorities, and meeting agencies programming needs.
- Conveying our identity: ensuring that our buildings have an image of accessibility and responsiveness (in-short, how adaptable are our buildings to program changes).
- Emphasizing resiliency: ensuring that buildings are prepared to withstand catastrophic events – both natural (earthquake) and man-made (climate change which could affect loads, snow loads, etc.).
- Applying best practices when maintaining and planning for new facilities: for example, utilizing Master Planning to help facilitate the long-term need when planning for larger or improvement and capital construction projects.
- Facility investment tool: effective investment strategy that leverages matching dollars.

OSH is committed to comply with regulatory requirements and achieve good stewardship of state assets to provide a safe and therapeutic environment of care to Oregon's most vulnerable populations.

Project Budget Estimate - Escalate to the mid-point of construction. Use 4.5% Annual Escalation.

	\$	% Project Cost	\$/C
DIRECT CONSTRUCTION COSTS			
1 Building Cost Estimate	\$ -		
2 Site Cost Estimate (20 Ft beyond building footprint)			
3 TOTAL DIRECT CONSTRUCTION COSTS	\$ -		
INDIRECT CONSTRUCTION COSTS			
4 Owner Equipment / Furnishings / Special Systems			
5 Construction Related Permits & Fees			
Other Indirect Construction Costs Including 1% Art, 1.5% Renewable Energy and other state requirements			
6 Architectural, Engineering Consultants			
7 Other Design and PM Costs			
8 Relocation/Swing Space Costs			
9 TOTAL SOFT COSTS			
11 OWNER'S PROJECT CONTINGENCY			
TOTAL PROJECT COST	\$ -		

Cost Estimate Source (EG Agency, Cost Estimator, A/E, etc.)

Project Image/Illustration (optional)

Facility Plan - 10 Year Space Needs Summary Report
 2025-27 Biennium

Agency Name Oregon Health Authority (OHA) | Oregon State Hospital (OSH)

Note: List each project/lease or disposal separately.
 Proposed New Construction or Acquisition - Complete for 5 Biennia

Biennium	Agency Priority	Concept/Project Name	Description	GSF	Position Count¹	General Fund	Other Funds	Lottery Funds
2025-27		None	NA					
2027-29		TBD	TBD					
2029-31		TBD	TBD					
2031-33		TBD	TBD					
2033-35		TBD	TBD					

Proposed Lease Changes over 10,000 RSF - Complete for 3 Biennia

Biennium	Location	Description/Use	Term in Years	Total RSF² +/- (added or eliminated)	USF³	Position Count¹	Biennial Rent/RSF⁴
2025-27	None	NA		A	B	C	D
2027-29	TBD	TBD					
2029-31	TBD	TBD					
2031-33	TBD	TBD					
2033-35	TBD	TBD					

Proposed Lease Changes over 10,000 RSF - Complete for 3 Biennia

Biennium	Location	Description/Use	Term in Years	Total RSF² +/- (added or eliminated)	USF³	Position Count¹	Biennial Rent/RSF⁴
2025-27	None	NA		A	B	C	D
2027-29	TBD	TBD					
2029-31	TBD	TBD					
2031-33	TBD	TBD					
2033-35	TBD	TBD					

Planned Disposal of Owned Facility

Biennium	Facility Name	Description
2025-27	None	NA
2027-29	TBD	TBD
2029-31	TBD	TBD
2031-33	TBD	TBD
2033-35	TBD	TBD

Definitions

Occupant Position Count (PC)	1	Estimated Position Count assigned to (home location) each building or lease as applicable
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RSF	2	Rentable SF per BOMA definition. The total usable area plus a pro-rated allocation of the floor and building common areas within a building.
USF	3	Usable Square Feet per BOMA definition for office/administrative uses. Area of a floor occupiable by a tenant where personnel or furniture are normally housed plus building area convertible to occupant area and not required by code or for the operations of a building. If not known, estimate the percentage.
O&M	4	Total Operations and Maintenance Costs for facilities including all maintenance, utilities and janitorial