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May 13, 2014

SB 540 Task Force
Oregon Department of Education
255 Capitol Street NE, Salem Oregon 97310

Chair Donahue & Task Force Members,

The Center (CISF) appreciates the opportunity to comment on the Task Force's draft recommendations on **Technical Assistance** based on the report considered at your April meeting. This initial report certainly provides a strong structure for a program. We would, however, like to comment on several elements of the proposal as follows:

Summary Statement

- 1st paragraph – It would be helpful to have “equity” defined a bit. For example is this equity within districts or among districts or both?
- 2nd paragraph – Technical Assistance is recommended in 3 areas, our experience would suggest that this is too limited and in fact, only addresses the “process” or “A & E” elements and doesn't help a district begin on the “delivery” of quality facilities. We recommend three additional areas of technical assistance including:
 - Communications or Advice on Gaining Capital Funding – Covering everything from pre-bond communications to assistance with funding and grant forms to intergovernmental relations. The technical assistance would offer advice only and not the actual completion of such work.
 - Procurement and Contract Management – Again, we are not suggesting that State deliver the actual service but rather assist districts in the acquisition of cost effective and quality services.
 - Real Estate – There's a broad range of assistance needed here including everything from zoning issues, surplus property disposal and leases, to acquisition and equity partnerships.
- The 1st bullet mentions “centralized site data” but is unclear on what kind of data and its use.
- The 3rd bullet references “completed programs”; we assume this means the certification programs that are related to the 3 proposed areas of technical assistance, but this is unclear.

Physical Assessment

We found this outline to be clear and useful. There was some thought that there may be more in-depth assessment needed in some areas in the future. It may also be useful to include reference to national recognized facility condition index (FCI) elements bringing some standardization and therefore comparative data to the process.

School Facility Planning (ORS 195.110)

It is recommended that “property assessment” be added to ORS 195.110 as numerous districts have no process for determining surplus real estate and appropriate disposition.

Educational Specifications

- First, we are unclear as to the underlying basis for “education specifications.” We assume it to be “Facility Standards”. If this is correct, it would be helpful to state that both here and in the initial reference in the Summary.
- The initial sentence mentions “common baseline criteria”. Again, we are unclear as to whether this reference facility standards related specs like science lab specs or baseline facility conditions like air quality, noise, lighting and technology that directly impact learning.
- The later reference to “minimum State standard” raises a similar question, especially as it focuses on “equity.”

Suggested Model

This model receives a mixed review from our leadership may benefit from further discussion. Some things to consider:

- Is it wise to create a new bureaucracy to manage this process?
- Can a smaller staff facilitate the hiring of private sector entities as the needs arise for these districts and could this also include volunteer organizations?
- What is the process for providing districts the help they need and how much will districts use this resource?
- The ultimate goal is to get money into the hands of the districts to meet their needs, how is this accomplished?
- Shouldn't technical assistance also include a centralized resource for best practices, case studies and other information?

Overall, we would suggest that rather than specify a staffing model, that instead the outcomes are outlined. For example, there appear to be two functions needed: (1) administration of the grant program and database and, (2) delivery of technical assistance to districts in the SB 540 specified “capital construction programs” which as noted earlier, we believe goes beyond the three assessment and planning areas outlined so far. With the addition of an oversight body, the service delivery structure can then be reviewed and approved based on a set of outcomes.

In summary, we find this set of recommendations on Technical Assistance for Oregon's school districts to be a strong foundation, but believe at the very least that the three additional elements of “ Communications, Procurement and Real Estate” need to be added for it to accomplish the Task Force's objectives along with an oversight body that includes related industry specialists.

Thank you for your attention, and I am available offer to discuss our recommendations with you further should you be interested.

Respectfully,



Tim Baugus,
Vice Chair, CISF Board of Directors



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EASTERN OREGON FACILITY WORKSHOP

DATE: Wednesday **March 12th, 9:30am – 3:30pm**

WHERE: Intermountain ESD, 2001 SW Nye Ave, Pendleton, OR

Please join in a work session with SDs from around the Eastern Oregon region on:

DEVELOPING LONG RANGE FACILITY PLANS (LRPF) THAT ARE ORGANIC & UPDATE-ABLE

Learn what you can do On Your Own and When to Call in the Specialists!

- **Education Facilities Planning and Environments** – Greg McCracken and Lee Fenton - BLRB Architects
- **Envelope (roof, walls, openings) and foundation** – John Williamson - Skanska
- **Interior Systems (HVAC, Mechanical and Plumbing, etc)** – Brian Butler PE, LEED AP and David Chesley PE, RCDD, LEED AP – Interface Engineering
- **Security, Safety, Communications & Technology** – Gary Hodson, Johnson Controls
- **Financial Planning and Projections** – Katie Schwab, Wedbush

Homework: We ask that you select one school as your prototype for the work session. We will get checklists on each topic to you about a month in advance, so you can collect the information on your school and bring it with you. Or, you can join in with another district and work on their school LRFP. CISF has data on most every school if you need assistance.

Format: This workshop will be a combination of training segments followed by hands-on work sessions on that segment. You should leave the workshop with a LRFP draft for your school and process for which can be used on your other schools. We encourage participation by lead staff and interested board members.

Register via CISF website:
<http://www.cisforegon.org/support/events/>

COST: CISF Members:
FREE
Non-members: \$25
(Scholarships on email request)

Lunch: BYOL or Lunch Deli Buffet \$9 (Build Your Own – sandwich, salad, and drink)

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CENTRAL OREGON FACILITY WORKSHOP

DATE: Friday, April 11th at 10am – 3pm

WHERE: Redmond District School Office, 145 SE Salmon Ave, Redmond, OR 97756

Please join in a work session with SDs from around the Central Oregon region for:

DIGGING INTO THE SPECIFICS ON -

- **Procurement Laws & Changes** - Jeff Condit, Miller Nash
- **Round Table Best Practices Exchange** - Regional Specialists
- **Commissioning, Re-Commissioning & Retro-Commissioning** - Mike Di Pasquale, Engineering Economic INC.
- **Updates on SB 1149 & Cool Schools** - Jonathan Belmont, Oregon Department of Energy
- **Update on State Facility, Funding and Legislation**

COST: CISF Members: FREE
Non-members: \$25 (Scholarships on email request)

Lunch: BYOL or Lunch Deli Buffet \$9 (Build Your Own – sandwich, salad, and drink)

Register via CISF website:
www.cisforegon.org/support/event

Jeff Condit: Will discuss statute changes around CMGC from the Department of Justice, as well as Goods and Services laws that are shifting. In the process, he'll cover current laws and issues districts are having in meeting their requirements.

Mike Di Pasquale: Outlining the specifics of 3 types of commissioning, Mike will help you figure out where you can get more out of your existing systems and save money.

Jonathan Belmont: Instead of providing another overview of SB 1149 and Cool Schools, Jonathan will update you on recent changes then talk specifics about your buildings and where there might be opportunities for you to get funding and save energy.

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SOUTHERN OREGON FACILITY WORKSHOP

Friday, May 16th at 9:30am – 3pm
Board Room, Medford SD Education Center
815 S. Oakdale Avenue, Medford

*Please join in a work session with SDs from around
the Southern Oregon region for:*

In-Depth Training and Discussion on –

- **Maximizing Roof Life through Regular Maintenance** – Steve Ingram, Tremco & Mark Button, Medford School District
- **Security Best Practices for Facility & Operations** – Norm Nomie, Johnson Controls; Jeff Bales, Medford School District; Sean Gallagher, Lake School District
- **Best Practices Exchange with Regional Specialists & Update on proposed Facility Funding legislation**

COST: CISF Members: FREE
Non-members: \$25 (Scholarships on email request)

Lunch: BYOL or Lunch Deli Buffet \$9 (Build Your Own – sandwich, salad, and drink)

Register via CISF website:
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