

Lake Washington School District Executive Limitation Monitoring Report

**EL-13 Facilities
March 5, 2018**

Executive Limitation: The CEO shall assure the availability of an appropriate education environment within physical facilities that are safe, efficient, and properly maintained and that support the accomplishment of the Board’s End Results policies.

Accordingly, the CEO shall:

<ol style="list-style-type: none"> 1. Develop a fiscally prudent; long-term facilities plan to establish priorities for construction, renovation, and maintenance projects. In setting those priorities, the CEO shall: <ol style="list-style-type: none"> a. Assign highest priority to the correction of unsafe conditions; b. Include maintenance costs as necessary to enable facilities to reach their intended life-cycles; c. Disclose assumptions on which the plan is developed, including growth patterns, and the financial and human capital impact individual projects will have on other parts of the organization, and d. Ensure that facilities and equipment are not subject to improper wear and tear or insufficient maintenance. 	<p>In Compliance</p>	
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Evidence

Long-term planning is accomplished by way of “capital planning” and “preventive/predictive maintenance planning.” These planning measures work in tandem to provide integrated strategies for district construction, maintenance, and operations in order to establish priorities that result in present and continually “safe and functional buildings” (Administrative policy DA, Fiscal Management Goals) in alignment with the District’s strategic goals: *Goal 2 - Provide Safe & Innovative Learning Environments*; and, *Goal 4 – Use Resources Effectively & Be Fiscally Responsible*. Planning balances the facilities needs with prudent use of resources to minimize the potential impact of taking funding away from classroom instruction.

Capital Planning

Capital planning efforts include: 1) the Six-year Capital Facilities Plan; 2) growth and modernization/ replacement project planning; 3) development tracking, school capacity studies, occupancy utilization, and enrollment projections; 4) total cost of ownership studies and resource impact analysis; 5) real estate planning; 6) the State Study and Survey; 7) the State Asset Preservation Program building condition analysis; and, 8) district educational specifications for schools. The district updates baseline educational specifications prior to a bond measure and uses total cost of ownership studies to help determine building and site solutions that are durable and in alignment with available resources.

- In November 2014, the district convened a 63-member Long Term Facilities Planning Task Force to study and provide recommendations on how to address the district’s growing enrollment and aging facilities. The Task Force finalized their recommendations in November 2015.

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Evidence {continued}

- The 2017-2022 Six-Year Capital Facilities Plan was adopted by the Board in June 2017. It was presented to the King County School Technical Review Committee (STRC). At the end of calendar year 2017, all jurisdictions (King County, City of Kirkland, City of Redmond, and the City of Sammamish) adopted the school impact fees as proposed by the District. The school impact fees on new residential development for calendar year 2018 are \$11,954 per single-family unit and \$733 for each multifamily unit. The single-family fee represents an increase of \$1,132 and the multi-family fee is a decrease of \$222 from the prior year’s fees.

Preventive Maintenance Planning

Preventative maintenance planning tools include but are not limited to: the Asset Preservation Program (*Appendix A*); life-cycle system replacement planning; planned, predictive, and preventive maintenance through an automated work order system; system surveys and assessments; failure analysis; metrics; monitoring; and, trending. Both capital levy and general fund monies are expended to address facilities (i.e. building and site) system upgrades and needs.

The priority of Facility Services is to avoid and/or correct unsafe conditions in order to provide educational (i.e. business) continuance and avoidance of injury. Unsafe conditions are known by way of various assessments and inspections or reports to Facility Services. Assessments and inspections as well as corrective, predictive, and preventive maintenance programs proactively inform capital (i.e. construction) planning.

The State Asset Preservation Program (APP) evaluates building/site systems to determine their general condition. This condition analysis (evaluation) is conducted annually, and it informs both the capital levy and preventive maintenance programs. A requirement of the APP is to annually report the findings of the evaluation to the Board of Directors, provide a record of that report to the Board, and then submit that evidence to the Office of the Superintendent of Public Instruction (OSPI) prior to April 1 each year.

Facility Services employs preventive/predictive maintenance, life-cycle planning, as well as building condition and evaluation assessments to help ensure that facilities and equipment are not subject to improper wear and tear or insufficient maintenance. These methodologies are reviewed and updated on a regular basis.

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Evidence {continued}

- In 2016-2017, Facility Services issued and completed 6,100 preventive maintenance (PM) work requests. These types of requests are pro-active. They extend the useful life of varying building and site equipment reducing unexpected or premature equipment failure.
- In 2016-2017, Facility Services received 16,718 new work orders as compared to 17,853 the prior year and resolved 15,681 work orders compared to 22,223 the prior year.
- The Remote Operations Center (ROC) monitors critical mechanical equipment throughout the district via the building automation systems. The ROC also serves as the first responder to thermal comfort issues and mechanical equipment alarms.
 - In 2016-2017, the center received 2,339 services requests compared to 1,373 the prior year.
 - 73.1% were resolved without the need to involve a LWSD technician.
 - 19.8% were routed to a LWSD technician with information to facilitate resolutions. This process reduces the amount of time spent troubleshooting the issue.
 - 4.5% could not be resolved or assisted in resolution and needed to be addressed by a LWSD technician.
 - 2.6% either required no action or were incorrectly assigned.
- The report of the annual APP evaluation has been completed and results reported in Appendix A - see Building Condition Assessment (BCA) scores from August 2016. The assessment focuses on the physical condition of general building systems.

Together, capital and preventive maintenance planning help ensure that: unsafe conditions are the highest priority to correct; facilities reach their intended life-cycles; changes in demographics and a sensitivity of project impacts on the organization are accommodated; facilities and equipment are not subject to premature failure; and, buildings remain open to support student education.

2. Secure board authorization before building or undertaking major renovation of buildings.	In Compliance	◀ ▶
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Evidence

The State School Construction Assistance Program (SCAP) is adhered to for major school construction projects. The method requires Board of Director authorization at various points of a project (e.g. new-in-lieu or replacement vs. rebuild decisions, project educational specifications, verification that a project will not result in or aggravate a racial imbalance, commitment to build the project, value engineering analysis, constructability review, commissioning report, and final acceptance). The Board must authorize the district to enter into a contract with a general contractor for major building construction or renovation.

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Evidence (continued)

- In 2016-2017, there were twenty-three (23) Board authorized actions related to major school construction.

Date	Site	Resolution No.	Action
10/10/16	82	2216	New-In-Lieu of Modernization Juanita High School
11/7/16	23	N/A	Change Order No. 3 Redmond Elementary School Addition Project
11/7/16	28	N/A	Value Engineering Report New Elementary School in Redmond Ridge East
11/7/16	72	N/A	Value Engineering Report New Middle School in Redmond Ridge
11/21/16	DW	2218	Authorizing Use of Alternative Public Works General Contractor/Construction Manager (GC/CM)
2/13/17	28	2219	Authorization to Proceed with Initial Site Construction, New Elementary School, North Redmond, Site #28
3/13/17	28/72	2220	Authorization to Proceed with Initial Site Construction New Elementary School in Redmond Ridge East, Site #31 and New Middle School in Redmond Ridge, Site #72
4/24/17	82	2222	Intent to Complete Juanita High School (Site 82) Rebuild and Enlarge
4/24/17	09	2223	Intent to Complete Peter Kirk Elementary School (site 09), Rebuild and Enlarge
4/24/17	58	2224	Intent to Complete Margaret Mead Elementary School (site 58), Rebuild and Enlarge
4/24/17	82	2225	OSPI D-5 Racial Balance Compliance Juanita High School (site 82), Rebuild and Enlarge
4/24/17	09	2226	OSPI D-5 Racial Balance Compliance Peter Kirk Elementary School (site 09), Rebuild and Enlarge
4/24/17	58	2227	OSPI D-5 Racial Balance Compliance Margaret Mead Elementary School (site 58), Rebuild and Enlarge
4/24/17	09	2228	New In Lieu of Modernization Peter Kirk Elementary School (site 09), Rebuild and Enlarge
4/24/17	58	2229	New In Lieu of Modernization Margaret Mead Elementary School (site 58), Rebuild and Enlarge
4/24/17	82	2230	Authorization to Proceed with Initial Construction Juanita High School (site 82), Rebuild and Enlarge
4/24/17	09	2234	Educational Specifications Approval Peter Kirk Elementary School (site 09), Rebuild and Enlarge
4/24/17	58	2235	Educational Specifications Approval Margaret Mead Elementary School (site 58), Rebuild and Enlarge
5/8/17	28	N/A	Authorization to Proceed with Initial Material Purchases Amendment #2 – New Elementary School, North Redmond (Site 28)

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Evidence (continued)

6/5/17	82	2239	Educational Specifications Approval Juanita High School (site 82), Rebuild and Enlarge Project
6/26/17	28	N/A	GC/CM Contract Amendment #3 Guaranteed Maximum Price New Elementary School in North Redmond (site 28)
6/26/17	31	N/A	GC/CM Contract Amendment #3 Guaranteed Maximum Price New Elementary School in Redmond Ridge East (site 31)
8/14/17	72	N/A	GC/CM Contract Amendment #3 New Middle School in Redmond Ridge East (site 72)

3. Recommend land acquisition by first determining growth patterns, comparative costs, construction and transportation factors, and environmental factors.	In Compliance	◀ ▶
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Evidence

The District monitors both short-term and long-term trends in demographics and updates projections annually. The monitoring includes tracking King County births, enrollment, and residential developments. These factors inform the District’s six-year Capital Facilities Plan and help identify potential property acquisition needs. Property acquisition needs can also occur when changes are made by regulatory agencies regarding zoning or land use. If needed, a feasibility study is conducted to determine the viability of the acquisition. Then, based on the Board of Directors’ agreement, due diligence is done on the property before the acquisition is presented to the Board for authorization to purchase.

In 2012, King County restricted school development in rural areas. The District owns several properties that are not able to be developed or will be restricted in use because of this ruling. The County’s decision caused the District to begin to look at options for owned property in the urban area.

4. Acquire, encumber, or dispose of real property only with Board authorization.	In Compliance	◀ ▶
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Evidence

The acquisition, encumbrance, or disposal of property requires Board authorization.

Acquisition

Site acquisition needs are based on master planning existing sites in alignment with program and project planning and “the attendance area maps for future school neighborhoods” (Administrative Policy FB, Facilities Planning).

- There was one (1) acquisitions of land in the 2016-2017 fiscal year.

Address	Resolution No.	Date	Description
1306 6 th Street, Kirkland WA 98033	2217	11/7/2016	Adjacent property to Kirk Elementary school necessary for rebuild and expansion project

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4. Acquire, encumber, or dispose of real property only with Board authorization.	In Compliance	◀ ▶
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Evidence (continued)

Encumbrance

Board Resolution No. 02 from April 1, 1982 gives the superintendent or his/her designee the authority to grant utility easements on district-owned property. There were twenty (20) utility easements recorded in the 2016-17 school year. Non-utility easements are submitted for Board of Directors approval. Before being submitted to the Board, legal counsel and staff review each easement.

- There was one (1) non-utility easements granted in the 2016-2017 school year.

Site	Resolution No.	Date	Type	Name	Assoc Name
RREES-Site 31	2231	4/24/17	Utilities and Access Easement	Lake Washington School District No. 414	Redmond Ridge East Homeowners Assoc.

Disposal

Disposal of real estate property requires Board action and is done in accordance with Administrative Policy DN, School Properties Disposal Procedure. This includes any “intergovernmental disposition of property” (i.e. dedication or conveyance of property). Property records are maintained in the Support Services office.

- During the 2016-2017 school year, there were two (2) dispositions of property.
- Once property is declared surplus, the district can proceed with sale of the property

Site	Resolution No.	Date	Type
27	2237	5/8/17	Surplus of District Property
99	2237	5/8/17	Surplus of District Property

- During the 2016-2017 school year, there was one (1) dedications of property.

Site	Resolution No.	Date	Type
28	2241	6/26/17	Right of Way Dedication

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Accordingly, the CEO shall:

5. Prohibit construction schedules and change orders to deviate significantly from previously approved plans and budget parameters.	In Compliance	◀ ▶
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Evidence

Facility Services staff work to prohibit the substantial change in the schedule, budget, and change orders of construction projects. This is accomplished by weekly review of the contractor’s schedules and the scope of the work. In addition, there is regular review of the budget by both the project manager and district administrative staff.

Schedules

Schedules influence planning and budget (due to inflation and market conditions), while program, project phasing, unforeseen conditions, and other situations can cause schedule changes. The schedules are initially formed prior to a bond or levy measure that funds a project, which is then refined before the beginning of a project.

- The following chart shows as of August 2017, the opening status of all major construction projects in comparison to the original schedule. The timeline for Juanita High School was accelerated one full year due to efficiencies recognized by the District and design/contracting team in the phasing and sequence of construction.

Major Construction Projects	Original 2016 Bond Project Scheduled Opening	Revised 2016 Bond Project Scheduled Opening
Juanita High School	2021	2020
Redmond Ridge Middle School	2019	2019
Redmond Ridge East Elementary	2018	2018
North Redmond Elementary	2018	2018
Kirk Elementary	2019	2019
Mead Elementary	2019	2019
Old Redmond School House	2019	2019
Explorer Modular Replacement	2017	2017

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Evidence {continued}

Budgets

Budget parameters are initially determined prior to the capital bond or levy that funds identified projects. Each measure establishes a program budget, in which there are multiple projects. Project budgets are closely monitored with reports submitted to senior management to help ensure adherence to the set project budget. If additional budget, beyond that which was initially established is needed, senior management approval is needed to adjust the budget and/or allocate from project contingencies. Deviation from initial budget parameters can occur. Some reasons for such deviation include: unforeseen circumstances; changes in codes and regulations; and, changes in scope, programming, and/or project timing.

In general, construction budgets include two types of costs: 1) “hard” (the construction contract cost for both site and off-site work) costs; and, 2) “soft” (e.g., taxes; fees [permit, legal, inspection and professional services]; easements; insurance; furniture, etc.) costs. The square foot cost of a building is based on the construction (i.e. “hard”) costs, including change orders divided by the building’s total square footage.

- Major construction project budgets are shown on the table below. Eight major construction projects are being funded from the 2016 Bond.

Major Construction Projects	Amount Budgeted	Budgeted “Hard” Costs	Budgeted “Soft” Costs	Amount Spent as of August 31, 2017	Reason for Overage
Juanita High School	\$145,477,000	\$98,328,000	\$47,394,000	\$8,505,614	NA
Redmond Ridge Middle School	\$77,592,000	\$52,445,000	\$25,147,000	\$10,742,761	NA
Redmond Ridge East Elementary	\$43,257,000	\$29,238,000	\$14,019,000	\$7,216,538	NA
North Redmond Elementary	\$43,257,000	\$29,238,000	\$14,019,000	\$9,962,739	NA
Kirk Elementary	\$44,987,000	\$30,407,000	\$14,580,000	\$1,395,164	NA
Mead Elementary	\$44,987,000	\$30,407,000	\$14,580,000	\$1,325,130	NA
Old Redmond School House	\$7,837,000	\$5,269,084	\$2,514,616	\$122,776	NA
Explorer Modular Replacement	\$2,338,320	\$1,636,750	\$701,570	\$2,013,377	NA

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Evidence {continued}

Change Orders

Major construction projects are complex. All construction projects have change orders. Construction change orders are a “change management” process whereby agreed upon modifications to the original contract’s scope of work of a project are implemented. Such modifications are agreed upon by the owner, architect, and contractor. Reasons for change orders include: regulatory agency requirements; unforeseen conditions; owner-requested changes; and, design coordination issues. Historically the district’s goal is to have a construction change order rates below ten (10) percent of the construction “hard” cost of the project. And a change order rate greater than fifteen (15) percent would be considered a significant deviation from the intended project.

- No change orders were executed in the 2016-2017 fiscal year.

6. Provide students and staff with an uncompromised and healthy environment.	In Compliance	◀ ▶
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Evidence

The district utilizes various strategies to promote healthy learning and working environments for students and staff that are in alignment with available resources.

Standards and Levels of Service

Various facilities and operational standards and levels of service have been established that support consistent healthy learning and working environments. These include and are not limited to: school design elements (e.g. day lighting, acoustics, building envelope integrity, and other sustainable building/site aspects); building materials that do not contain asbestos, lead, PCBs or other regulated materials and that have no or very low volatile organic compounds (VOCs); durable, easily maintained and cleanable surfaces; and, established custodial service levels and expectations. In addition, there are reviews, updates, and additions to standards and to levels of service.

- In 2016-2017, Facility Services developed Levels of Service (LOS) for the Painting Department. The focus was on development and implementation of an interior painting lifecycle program to provide predictable painting schedules to the district. The interior common spaces of all existing schools were assessed and prioritized based on their conditions. Assessment includes corridors, common spaces, and restrooms. A lifecycle schedule was implemented with each school expecting to be painted every 5-6 years. The painting staff was also adjusted to an evening 2nd shift to maximize efficiency and minimize disruptions to the learning environment.
- In 2016-2017, Facility Services continued to update processes, standards, guidelines, and protocols for the Grounds Department Levels of Services (LOS). The Grounds LOS document uses Association of Physical Plant Administrators (APPA): Leadership in Education Facilities to design staffing levels, and desired outcomes.

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6. Provide students and staff with an uncompromised and healthy environment.

In
Compliance



Evidence {continued}

- Annual assessments are planned to evaluate staffing and equipment, with consideration given to square footage, enrollment, frequency levels and budget. Tasks include but are not limited to Lawn Maintenance, Bed Maintenance, Hard Surfaces, Tracks and Athletic Fields.

Inspections and Assessments

Planned and regular inspections, as well as responsive assessments, are conducted to maintain healthy conditions. Examples include: the regular planned examination of vital building and site systems (*Appendix B*); various building condition evaluations that inform both planning and project implementation and fulfill state requirements; and, the prompt response to Indoor Environmental Quality (IEQ) concerns.

Environmental and Health Concerns

To protect the health and safety of staff and students, district Custodial Services utilizes cleaning and paper products that are “Green Seal Certified.” In addition to green certified products, green cleaning methods and standards are followed. Custodial practices, along with Facility Services solutions, help reduce the district carbon footprint and contribute to the reduction of harmful chemicals in the environment. All purchases (products, materials, and new equipment) are made with green practices and solutions as the goal.

Facility Services manages a variety of programs and makes notifications as is appropriate. Protocols have been developed to manage specific programs such as Integrated Pest Management (IPM/*Appendix C*) to appropriately and pro-actively address various situations. In the event chemicals are used while school is in session, notifications from the school involved are sent home with students.

- In 2016-2017, chemicals were not used while school was in session; as such, no notifications occurred.
- In 2016-2017, there were no Indoor Environmental Quality (IEQ) concerns that led to a loss instructional time.
- In 2016-2017, the district satisfied the requirements necessary to retain its IPM STAR Certification.
- In 2016-2017, the district developed and implemented a drinking water quality maintenance program. This program is designed to provide regular maintenance of drinking water fixtures through Custodial Services and the district plumbers. The plan includes a survey of all drinking water fixtures, periodic cleaning aerators, and thorough documentation of repair/replacement of fixtures. The plan also includes testing for approximately one quarter of schools each year.

Response to Emergencies

Issues that are deemed an immediate danger to the health, welfare, or safety of persons using buildings or sites are considered emergencies and responded to the same day with the goal to resolve within two (2) days. Other situations that warrant the same type of response include: violations to the fire code; repair of fire/security detection systems; roof leaks; or, situations that might lead to the major disruption of the educational program. In addition, incidents of vandalism are treated as emergencies and responded to accordingly.

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Evidence {continued}

- In 2016-2017, there were a total of 91 incidents of vandalism in the district reported to Support Services requesting response. The table below provides the number of incidents by level for the past five years:

	2016-2017	2015-2016	2014-2015	2013-2014	2012-2013
Elementary	38	39	31	31	35
Middle Schools	29	8	19	16	21
High Schools	24	23	10	20	31
Other Sites	0	0	0	0	1
Total	91	70	60	67	88

- The most frequent types of vandalism were graffiti (62 events).

Vandalism, reported to Support Services for repair, cost the district \$25,236 during the 2016-2017 school year. If the perpetrators are caught, the district seeks restitution; no dollars were recovered in 2016-2017. The table below provides data for the past five years:

	2016-2017	2015-2016	2014-2015	2013-2014	2012-2013
Annual Cost of Reported Vandalism	\$25,236 With no recovery	\$12,052 With no recovery	\$11,564 With no recovery	\$12,561 With a recovery of \$326	\$14,140 With a recovery of \$710

7. Permit the public’s use of facilities as long as student functions and the academic program are not compromised. Accordingly, the CEO shall develop a plan for public use of buildings that includes: a. definition of permitted uses; b. a fair and reasonable fee structure; c. clear delineation of user expectations; and, d. consequences and enforcement procedures for public users who fail to follow the established rules.	In Compliance	◀ ▶
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Evidence

The district makes building and fields available for public use on a scheduled basis to ensure that school functions and the academic programs are not compromised. Each site is responsible for their own scheduling.

Permitted Use

To assist schools and the public in understanding the guidelines for community use, the district provides *Guidelines and Procedures for Use of School District Facilities* on the district website. Schools are also provided specific guidelines for staff in charge of building use. These guidelines are reviewed annually and updated as needed.

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Evidence {continued}

Fees

User groups pay fees depending on their classification. Building use fees are increased on an annual basis per the Consumer Price Index (CPI). The district tracks the dollars received from building use. Schools receive 30% of fees collected, excluding the cost of custodial, supplies, and energy.

- In 2016-2017, a total of \$648,564 was collected for building use fees, exclusive of amounts paid for leases and reimbursement for custodial help. The table below provides a detailed breakout of fees collected for the past five years:

	2016-2017	2015-2016	2014-2015	2013-2014	2012-2013
<i>Amount to Schools</i>	\$46,797	\$30,531	\$37,648	\$44,660	\$39,368
<i>Energy Use</i>	\$134,519	\$127,948	\$131,321	\$140,783	\$120,101
<i>Supply Fees</i>	\$55,035	\$56,963	\$54,294	\$58,909	\$50,904
<i>Amount to General Fund</i>	\$109,191	\$65,453	\$87,846	\$104,201	\$91,862
<i>Stadium Rental</i>	\$185,197	\$159,783	\$159,690	\$188,787	\$182,145
<i>Theater Rental</i>	\$117,825	\$115,149	\$105,203	\$108,011	\$91,728
<i>Total</i>	\$648,564	\$555,827	\$576,002	\$645,351	\$576,108
<i>Reimbursement for Custodial Help</i>	\$111,428	\$82,830	\$79,332	\$75,880	\$54,320

Expectations and Consequences

The “Application for Use of School District Facilities” form, completed by each requesting user group, delineates user expectations and consequences if procedures are not followed or if damage occurs to the building/site. User groups who cause any building or site damage, break equipment, vandalize school property, or make alterations to buildings or groups will be billed for repairs and corrections and may lose their right to be granted future building use.

I certify the above to be correct as of March 5, 2018.

Dr. Traci Pierce, Superintendent