



**LEBANON COMMUNITY SCHOOL DISTRICT
SCHOOL BOARD MEETING
MAY 11, 2023, 6:00 PM**

Santiam Travel Station

750 S. Third Street, Lebanon, OR 97355

DISTRICT GOALS: Improve Student Achievement, K-3 Literacy, On-Time Graduation

MEETING AGENDA

1. WELCOME

- A. Call to Order
- B. Flag Salute

2. PUBLIC COMMENTS

This is a time for citizens to address the Board. The Chair will recognize speaker(s) at the designated time. All speakers shall identify themselves and state their name before speaking. Speakers are asked to provide their name, address and telephone number on the Speaker's Sign-in Sheet. Each speaker may address the Board for three minutes.

3. APPROVAL OF CASCADES SCHOOL MOVING TO K-5 **Action: Approval Requested**

4. LHS BLOCK SCHEDULE, pg. 4 **Action: Informational**

5. LONGITUDINAL PERFORMANCE GROWTH TARGETS, pg. 12 **Action: Informational**

6. CONSENT AGENDA **Action: Approval Requested**

- A. April 13, 2023 Board Meeting Minutes, pg. 17
- B. Policy Updates – First and Second Readings, pg. 22 & 42

CODE	TITLE
FIRST READING	HIGHLY RECOMMENDED
KL-AR	Complaint Procedure
	INFORMATION ONLY
JEC-AR (1)	Open Enrollment/School Attendance Areas
JEC-AR (2)	Lottery Procedures
JEC-AR (3)	Application for Open Enrollment
IIA-AR (1)	Instructional Materials/Program Adoption Procedure
IIA-AR (2)	Challenge of Instructional Materials
IIA-AR (3)	Challenge Request for Instructional Materials
SECOND READING	REQUIRED
AC-AR	Discrimination Complaint Procedure
JFCF-AR	Hazing, Harassment, Intimidation, Bullying, Menacing, Cyberbullying, or Teen Dating Violence Reporting Procedures- Student
JGE	Expulsion**

C. Hiring:

NAME	POSITION	FTE	START DATE	END DATE
NEW HIRES 2023-24				
Emma Christensen	Choir Teacher – Lebanon High School	1.0	8/28/2023	
Sheridan Hounsshell	Special Education Teacher (LRC) – Lebanon High School	1.0	8/28/2023	
Susanne Phillips	Special Education Teacher (Life Skills) – Lebanon High School	1.0	8/28/2023	
Deidra Spencer	Science Teacher – Lebanon High School	1.0	8/28/2023	

7. DEPARTMENT REPORTS

Action: Approval Requested

- A. Operations
- B. Human Resources
- C. Finance
 - 1. Financial Report, pg. 54
 - 2. HMK Recommendation for GMP, pg. 62

8. COMMUNICATION

Action: Informational

- A. Board
- B. Superintendent
 - 1. Jen's Zens

9. AUDIENCE COMMENTS

The Lebanon Community School District Board of Directors welcomes you to our regular meeting. It is the Board's goal to hold an effective and efficient meeting to conduct the business of the District. In keeping with this goal, the Board provides a place for Audience Comments on each of its regular agendas. This is a time when you can provide statements or ask questions. The Board allows three minutes for each speaker. The language below discusses the Public Meetings Law and public participation in such meetings.

"The Public Meetings Law is a public attendance law, not a public participation law. Under the Public Meetings Law, governing body meetings are open to the public except as otherwise provided by law. ORS 192.630 The right of public attendance guaranteed by the Public Meetings Law does not include the right to participate by public testimony or comment.

"Other statutes, rules, charters, ordinances, and bylaws outside the Public Meetings Law may require governing bodies to hear public testimony or comment on certain matters. But in the absence of such a requirement, a governing body may conduct a meeting without any public participation. Governing bodies voluntarily may allow limited public participation at their meetings."

Oregon Attorney General's Administrative Law Manual and Uniform and Model Rules of Procedure under the Administrative Procedures Act. Hardy Myers, Attorney General, March 27, 2000.

10. ADJOURNMENT

Upcoming meeting dates:

May 18, 2023 – Budget Meeting at 6:00 PM

May 25, 2023 – Budget Meeting at 6:00 PM

June 8, 2023 – Board Meeting at 6:00 PM

Agenda Item 4

LHS Block Schedule

Block Schedule at LHS

In Effect 2023-2024



Current Schedule vs. Block Schedule

Current

- Students attend seven, 52-minute periods daily
- Teachers teach 6 of 7 classes each day

Block

- Students attend eight, 90-minute periods over two days
 - Periods 1 - 4 on Red Days
 - Periods 5 - 8 on Blue Days
- Teachers teach 6 of 8 classes over two days
 - *Wednesday early release would include all 8 classes*



Challenges with Block Schedule

- Lack of *daily* practice for students
- Training for staff needed
 - Adjusting content to longer periods
 - Managing pacing; incorporating movement
- Change can be hard



Benefits of Block Schedule

- More **credit opportunities** (32); current is 27 to 28
 - More opportunities for targeted **intervention** and **acceleration**
- Increases master schedule **flexibility**, creating fewer limitations for students (e.g., greater student **choice** for electives)
- Increased opportunities to go deeper with, and **differentiate**, instruction



Benefits of Block Schedule, continued

- Fewer **transitions** for students
 - Fewer opportunities for non-academic behavior
 - Less homework each evening
- Upperclassmen have more opportunities for **open periods**
 - work study internship, school to work, expand CTE, etc.
- Increased daily **prep time**



Process

- **March 1:** Principal Swanson presented options and info to LHS teachers; had anonymous form they could complete to submit questions/comments/concerns.
- **March 8:** Met with teachers again; shared submissions and addressed previous/current questions. Sent out a survey to determine staff's position.
 - 75.5% voted in favor
 - 15.8% were undecided or neutral
 - About 9% were opposed



Current / Upcoming

- Determining logistics
 - Teacher committee (assemblies, etc.)
 - District support (lunch, transportation, etc.)
- Master scheduling
- PD / Teacher planning time begins Wednesdays in mid-May
- Communication to students/families in fall
- Start the year→ listen→ adjust/support/train as needed



Agenda Item 5

Longitudinal Performance
Growth Targets

Longitudinal Performance Growth Targets

ORS 327.190 states that we will collaborate with ODE to develop LPGT's. They must:

- Include overall data and be disaggregated
- Apply to the whole body of students *and* to focal groups
- Use these five metrics:
 - **Four-year graduation:** percentage earning a regular or modified diploma within four years
 - **Five-year completion:** percentage earning a regular, modified, extended, or GED within five years
 - **Third grade reading:** percentage proficient on statewide ELA assessments
 - **Ninth grade on-track:** percentage earning at least one-quarter of grad credits by end of 9th grade
 - **Regular attenders:** percentage attending more than 90% of enrolled school days

Longitudinal Performance Growth Targets

Our steps include:

- Review and examine data regarding the five metrics
- Set long term, five-year targets for
 - Baseline (whole group)
 - Stretch (ambitious)
 - Gap Closing (for focal groups)

The targets should be based on historic trends in LCSD, consideration of the likely impact of our systems and programs, and statewide trends.

Longitudinal Performance Growth Targets

“ODE strongly recommends setting realistic and attainable targets. ... **Growth projected at rates higher than the percentages below is likely to be unattainable.**”

Indicator	Yearly Growth Achieved by Top 10% of Districts
Regular Attenders	1.2
3rd Grade ELA	3.4
9th Grade On-track	5.4
4-year Graduation	4.2
5-year Completion	2.6

“Consider any deviations from your usual trend that may have occurred as a result of COVID and the resulting instructional shifts.”

Longitudinal Performance Growth Targets

Our timeline:

- ❑ Convened team to review metrics; had questions for our ESD liaison
- ❑ Will convene again to draft targets
- ❑ Following acceptance of our Integrated Guidance application, we meet with ODE to review targets
- ❑ Will share LPGTs for approval at June board meeting
- ❑ Submit to ODE by end of June to ensure fall funding

Agenda Item 6

Consent Agenda

A. April 13, 2023 Board Meeting Minutes



**LEBANON COMMUNITY SCHOOL DISTRICT
SCHOOL BOARD MEETING
APRIL 13, 2023, 6:00 PM**

Santiam Travel Station

750 S. Third Street, Lebanon, OR 97355

MEETING MINUTES

<u>BOARD MEMBERS PRESENT:</u>	<u>EXECUTIVE STAFF PRESENT:</u>
Tom Oliver, Chair Richard Borden, Vice Chair Mike Martin, Member Nichole Piland, Member Tammy Schilling, Member	Jennifer Meckley, Superintendent William Lewis, Business Director Kim Grousbeck, Human Resources Director

The meeting minutes were recorded by Executive Secretary Jessica Woody.

1. WELCOME AND CALL TO ORDER

Board Chair Tom Oliver called the meeting to order at 6:12 PM and led the flag salute.

2. PUBLIC COMMENTS

No public comments were made.

3. DRESS CODE

Jennifer Meckley re-addresses the dress code topic, which was previously initiated during public comments at the January 2023 Board Meeting. She refers to the slides that were presented from the board packet, referencing the current policy that is in place for dress code, JFCA. It is noted that dress code requirements become more specific in student handbooks, and are vaguer in the policy itself. It is also explained that dress code violations are addressed directly with the student involved to propose a resolution, and if the student does not comply, the behavior is classified as disobedience rather than a dress code violation. The administrators at each building handle the violations with positivity and to educate, never to be little a student. Things that are considered regarding dress code violations are, has the student finally returned after being absent for several days, are they emotionally well today, and are they around a crowd of people where they can maintain their dignity. Guard rails to dress code can include lack of clothing options, appropriate view of clothing between various parents, free expression rights, and discrimination. These can cause equity issues that arise from enforcement and can make certain groups of students feel unsafe.

It is understood that there are many other disruptions happening in classrooms that the district has a much higher influence on, though the board members would like to see a basic standard practice followed consistently. It is questionable whether dress code is directly impacting the learning environment.

Tom Oliver notes that though this may not be the most important topic of discussion at this point, it may be more important than what it is in itself, right now.

4. APPROVAL OF GRADUATION ALLIANCE

Since Graduation Alliance is considered an alternative education, the district is seeking board approval of the program. Jennifer explains that the district has begun contracting with Graduation Alliance and refers to the document in the board packet, explaining what the program is and their processes. Brandon Weist, Alternative Education Director, and the Lebanon High School administrators lead the program, and there are a number of students already involved. Data is included showing the success thus far. It is noted that the students targeted for this program are ones that have completely dropped out and are not currently enrolled at LHS, and that if a student wishes to return they are still able to enroll at LHS. There is shared ADM, and since the district does not have the capacity, this makes for a great opportunity to continue to support these students. The board members feel that it would be great to build the capacity at Ralston Academy to possibly take on more students there as well. Jennifer also notes that some students who access Graduation Alliance are teen moms, and this is a great resource for them. There is no cost to the program, and it creates revenue as far as ADM, the only cost would be the staff time working on this with students.

Mike Martin motions to approve, and Richard seconds the motion. All in favor with a unanimous vote the board approves the partnership with Graduation Alliance.

5. K-5 MATH ADOPTION

Jennifer speaks upon the hard work of the districts Curriculum Director, Bill Wittman, who has done a great job with the adoption. Appreciation is also shared for all of the staff and people who were involved with this process, who were so inspiring and engaged. The final recommendation is to adopt Reveal Math which is a part of McGraw Hill product. Some of the great benefits were the engaging materials, ease of use for teachers, quick product delivery, and a lot of differentiation – title and sped aligned curriculum. There will be a 3-hour training for the curriculum at the beginning of the year, with ongoing training throughout the year. Jennifer acknowledges that elementary teachers implemented a brand-new ELA curriculum this year, and will now be implementing a brand-new math curriculum. The district will schedule early release Wednesdays strategically to spend time on the new material. The district is seeking approval from the board for the math adoption. Mike Martin motions to approve the recommendation to adopt Reveal Math for the K-5 Math Adoption, and Nicole Piland seconds the motion. All in favor with a unanimous vote, the math adoption with Reveal Math is approved.

6. CONSENT AGENDA

A question arose in regards to policy update JGE, it is confirmed that the update is reflecting the current process that the district has in place. The board members are satisfied with this.

Board chair Tom Oliver asks to table policy KL-AR, and would like to see it come back next month with revisions, keeping most of the original policy language and adding dates/timelines. Richard Borden motions to approve and Nicole Piland seconds the motion. All in favor with a unanimous vote, the consent agenda made up of the March 9, 2023 and March 20, 2023 Board Meeting Minutes, first reading policy update AC-AR, JFCF-AR, and JGE, temporary new hires Susan

Kropp and Brooklyn McElroy, and new hires Janet Fery and Thadeus Holub is approved in its entirety.

7. DEPARTMENT REPORTS

A. Operations

Jennifer shares an update on the Lacombe roof process, and provides some background on where the district was at with budgeting of this project in the past years. It is specifically noted that the district will have 1.5 million dollars saved by June of 2023 and the cost of the roof is 1.7-2 million dollars. It is noted that due to construction availability, the installation will not be able to take place until 2024, and the district is looking at how to move forward on some options until the roof can be replaced in 2024, and will continue to update as the process progresses. It is confirmed that the leaking that was taking place has been corrected the best that it can be, and is continuing to be addressed. The classes that were affected are continuing to be held in a new classroom.

B. Human Resources

Kim Grousbeck speaks to the board regarding the education support professional's classified mentoring program. She explains that they have been asked to attend the OSPC conference and NEA conference to provide training on the mentoring program, and be recognized for the district's success in the program.

C. Finance

William Lewis speaks to the board about deferred maintenance and ways to be able to fund additionally towards capital projects. He hopes to potentially transfer unused funds from the facilities maintenance budget to the capital projects fund.

William also notes that the auditors will be attending the next school board meeting to bring forward the 21-22 audit, so far there does not seem to be any concerns on the district's end.

HMK recommends to proceed with the guaranteed maximum price for excavation and concrete work for the Seven Oak project, noted in the board packet, and the district is seeking approval from the board. Mike Martin motions and Richard Borden seconds the motion for approval of the GMP Amendment 1 for the Seven Oak Classroom project up to MACC of \$674,704.90. All in favor, it is a unanimous vote to approve.

8. COMMUNICATION

A. Board

Nicole Piland notes some positive feedback that she received from a homeowner of one of the homes that was built by the school, and wanted to pass along how well built it was.

Richard Borden would like to see a presentation regarding the Lebanon High School block schedule and how it will impact students and staff.

Mike Martin references the meeting that he attended with the district staff regarding student behaviors, and speaks upon the success happening at the SEL program that is housed at Cascades School. He notes the importance he feels that the SEL program provides, and would love to see another SEL classroom in the district. Tom agreed and adds that that is currently one of the priorities of the district. Jennifer adds that the district will have to be creative with the staff that they do have and that it could look different at each building. Overall it is agreed that student behavior is a critical item that cannot be ignored.

B. Superintendent

Jennifer provides an update for summer school and explains the lack of funding for summer school this year, and that the last few years the district has been able to utilize COVID relief funds. There is legislation to get summer school funding, though that has not been finalized as of now, and the prediction is that it would be about half the amount of what the district had in the past year. The district will prepare for action and will be ready to act once the legislation comes to a decision.

Jennifer also shares some exciting news during Jen's Zen's. She highlights Mark and Susie Phillips for their hard work on the Lebanon High School transitions program's greenhouse, and a couple highlights from Lacombe school teachers, Julie Ragan and Kyla Creech, for their creative ways to engage students. Lastly, she announces the most recent apple award winners consisting of Yesenia Rodriguez in the Welcome Center and Angie Fritzler at Pioneer School.

9. AUDIENCE COMMENTS

No audience comments were made.

10. ADJOURNMENT

There being no further business before the Board, the meeting was adjourned at 7:37 PM.

Tom Oliver, Board Chair

Jennifer Meckley, Superintendent

Agenda Item 6

Consent Agenda

B. Policy Updates First Readings

May 2023 POLICY UPDATES – REVIEW AND RECOMMENDATIONS

Code	Title	OSBA Recommendation	DO Staff Lead(s)	Changes/DO Staff Comments	Recommended Adoption? (Yes/No)
KL-AR	Complaint Procedure	Highly Recommended	Jen	Update in timelines to more closely align with legal requirements. Extended the timeline for complaints/appeals at the Board level to 30 days.	Yes
JEC-AR (1)	Open Enrollment/School Attendance Areas		Jen	Change in Open Enrollment: Applications will be approved on a case by case basis dependent on the nature of the request. Updated language regarding Open Enrollment revocation procedures.	Information Only
JEC-AR (2)	Lottery Procedures		Jen	We will be reducing the number of open enrollments we approve. A lottery system will not be needed.	Information Only
JEC-AR (3)	Application for Open Enrollment		Jen	Change in Open Enrollment: Applications will be approved on a case by case basis dependent on the nature of the request. Updated language regarding Open Enrollment revocation procedures.	Information Only
IIA-AR (1)	Instructional Materials/Program Adoption Procedure		Jen	The District needs a formal process for adopting materials/programs	Information Only

IIA-AR (2)	Challenge of Instructional Materials		Jen	The District needs a formal process for challenging instructional materials	Information Only
IIA-AR (3)	Challenge Request for Instructional Materials		Jen	The District needs a formal process for challenging instructional materials	Information Only

Complaint Procedure

A parent or guardian of a student attending a school in the district, a person who resides in the district, a staff member, or a student who wishes to express a concern should discuss the matter with the school employee involved.

This regulation sets out the complaint procedure.

Process and timelines

The involved staff: Step One

A person who wishes to express a concern should discuss the matter with the employee involved. The employee shall respond within five working days. This step is considered informal complaint resolution.

The Administrator: Step Two

If the complainant is unable to resolve a problem or concern with the employee involved, the complainant may file a written, signed complaint with the administrator or supervisor of the involved employee. A written complaint commences the formal complaint process. The administrator or supervisor shall evaluate the complaint and provide a written response within ~~ten~~ **five** working days after receiving the complaint.

The Superintendent: Step Three

If the complainant is not satisfied with the Step 2 result and wishes to pursue the concern, the complainant shall file a signed, written complaint with the superintendent or designee clearly stating the nature of the complaint and a suggested remedy within 10 working days after receipt of the written response of the administrator or supervisor. A Step 3 complaint must be filed on the form attached to this policy. Copies of the form are also available at the district offices.

The superintendent or designee shall investigate the complaint, confer with the complainant and the parties involved, and prepare a written report. The report shall address each of the allegations in the complaint and include the superintendent or designee's decisions and reasons for the decisions. The report shall be provided to the complainant within ~~20~~ **10** working days after receiving the written complaint.

The Board: Step Four

The role of the Board is to address policy-level issues. Complaints that address the operations of the school district generally should be resolved by the superintendent and his/her staff. However, if a complainant is not satisfied with the Step 3 decision and wishes to pursue the concern, the

complainant may appeal the decision to the Board within five working days of receiving the superintendent's decision.

All Board members will be notified of the appeal to the Board. The Board chair will determine whether the Board will hear the appeal, and will notify the Board members and complainant of his/her decision. However, if a member of the Board disagrees with the Chair's decision, the Board member can refer the decision to a vote of the full Board. In that case, the full Board will vote on whether to consider the complaint.

If the Board chooses not to hear the complaint, the superintendent's decision is final.

If the Board decides to hear an appeal, the Board shall review the complaint during a properly-noticed Board meeting. The Board at its discretion may assign the investigation to a third party. The determination to assign the investigation to a third party shall be made by the Board Chair. However, if a member of the Board disagrees with the Chair's decision, the Board member can refer the decision to a vote of the full Board. The Board may also, in its discretion, offer the complainant and other involved parties an opportunity to appear before the Board, or may resolve the complaint based on the written record. ~~The Board may review the matter in executive session if permitted under the Oregon Public Meetings Law.~~

The complainant shall be informed in writing of the Board's decision within ~~10-30~~ working days. The Board's decision will address each allegation in the complaint and contain reasons for the Board's decision. The Board's decision will be final.

The timelines described in this section may be extended upon written agreement by the complainant and the district.

The complaint procedure set out above will not be longer than 90 working days from the filing date of the Step 2 complaint with the administrator or supervisor to the final decision, unless extended by mutual written agreement.

The district's final decision for a complaint processed under this administrative regulation that alleges a violation of Oregon Administrative rule (OAR) Chapter 581, Division 22 (Division 22 Standards), ORS 339.285 - 339.303 or OAR 581-021-0550 - 581-021-0570 (Restraint and Seclusion), or ORS 659.852 (Retaliation), will be issued in writing or electronic form. The final decision will address each allegation in the complaint and contain reasons for the district's decision. If the complainant, who is a [student,] parent or guardian of a student attending school in the district or a person that resides in the district, and this complaint is not resolved through the complaint process, the complainant may appeal¹ the district's final decision to the Deputy Superintendent of Public Instruction under Oregon OARs 581-002-0001 – 581-002-0023.

~~Complaints against the principal should be filed with the superintendent. The superintendent will attempt to resolve the complaint. If the complaint remains unresolved within 10 working days of receipt by the superintendent, the complainant may request to place the complaint on the Board agenda at the next regularly scheduled or special Board meeting. The Board may use executive session if the subject matter~~

¹ An appeal must meet the criteria found in OAR 581-002-0005(1)(a).

qualifies under Oregon law. The Board shall decide in open session what action, if any, is warranted. A final written decision regarding the complaint shall be issued by the Board within 30 days of receipt of the request to place the complaint on the Board agenda. The written decision of the Board will address each allegation in the complaint and reasons for the district's decision.

Complaints against the Superintendent

Complaints against the superintendent shall be filed with the Board chair. The Board chair shall present the complaint to the Board. The Board at its discretion may assign the investigation to a third party. The determination to assign the investigation to a third party shall be made by the Board Chair. However, if a member of the Board disagrees with the Chair's decision, the Board member can refer the decision to a vote of the full Board. At the next regularly noticed meeting following receipt of the investigation report, the Board will consider the complaint and determine what, if any, action is warranted. The Board may review the matter in executive session if permitted under the Oregon Public Meetings Law. A final written decision regarding the complaint shall be issued by the Board within 30 days of receipt of the complaint. The written decision of the Board will address each allegation in the complaint and reasons for the district's decision.

Complaints against a Board member

When a complaint is against a Board member, the Board at its discretion may assign the investigation to a third party. The determination to assign the investigation to a third party shall be made by the Board Chair, unless the complaint is against the Board Chair, in which case the determination shall be made by the Board Vice-Chair. However, if a member of the Board disagrees with the Chair's or Vice Chair's decision, the Board member can refer the decision to a vote of the full Board. The Board will consider the complaint during a properly-noticed meeting and determine what, if any, action is warranted. The Board member against who the complaint is filed shall not participate in any vote related to the complaint. A final written decision regarding the complaint shall be issued by the Board within 30 days of receipt of the complaint. The written decision of the Board will address each allegation in the complaint and reasons for the district's decision.

Notice of opportunity to appeal to Deputy Superintendent of Instruction

As indicated above, the final decision of the district must address each allegation in the complaint and contain reasons for the district's decision. In addition, complainants should be notified that they may have the right to appeal to the Deputy Superintendent of Public Instruction pursuant Oregon Administrative Rule (OAR) 581-002-0040 or OAR 581-021-0049 for complaints that alleges a violation of OAR Chapter 581, Division 22 (Standards), ORS 339.285 to 339.303 or OAR 581-021-0550 to 581-021-0570 (Restraint and Seclusion), ORS 659.852 (Retaliation) or ORS 659.850 (Discrimination).

Additional provisions

The district may offer mediation or another alternative dispute resolution process as an option if all parties to the complaint agree in writing to participate in such mediation or resolution. The timelines outlined in this procedure will be tolled during the mediation or alternative dispute resolution.

Complaints involving district staff will be processed in accordance with Human Resources procedures. Additionally, complaints regarding licensed or classified staff will be processed in accordance with applicable collective bargaining agreements. Complainants should be aware that the collective bargaining agreements and other considerations place limits on the processing of anonymous complaints. The Board will not hear complaints against employees in a session open to the public unless an employee requests an open session. Complainants should be aware that employees are entitled to certain confidentiality rights under state and federal law, as well as applicable collective bargaining agreements. Taking into account these confidentiality protections, complainants will be notified of the outcome of complaints against employees to the extent permitted by law and applicable collective bargaining agreements.

Retaliation against any person who files a complaint or participates in the complaint process is strictly forbidden. Concerns about retaliation should be brought promptly to the attention of a principal or the superintendent.

To ensure access to the complaint process, complainants shall be provided with interpretation or translation services upon request.

This complaint procedure will be available at the district's administrative office and on the home page of the district's website.

Charter Schools of which the District Board is a Sponsor

The district Board, through its charter agreement with Sand Ridge Charter School, will not review an appeal of a decision reached by the Board of the Sand Ridge Charter School on a complaint alleging a violation of ORS 339.285 - 339.303 or OAR 581-021-0550 - 581-021-0570 (Restraint or Seclusion), ORS 659.852 (Retaliation), or applicable OAR Chapter 581, Division 22 (Division 22 Standards), for which the district Board has jurisdiction, and recognizes a decision reached by the Board of Sand Ridge Charter School as the district Board's final decision. A final decision reached by this district Board may be appealed to the Oregon Department of Education under OAR 581-002-0001 - 581-002-0023.

Lebanon Community School District

COMPLAINT FORM

TO: ☐ District Office ☐ _____ (Name of School)

Person Making Complaint _____

Telephone Number _____ Date _____

Nature of Complaint _____

Who should we talk to and what evidence should we consider? _____

Suggested solution/resolution/outcome: _____

Signature of Complainant: _____ Date: _____

Office Use: Disposition of Complaint: _____

Signature: _____ Date: _____

c: District Office

Lebanon Community Schools

Code: **JEC-AR (1)**

Revised/Reviewed: 4/15/10; 1/20/11, 4/14/16,
10/13/16, 2/9/17, 1/11/18,
9/8/22

Orig. Code(s): JEC-AR (A)

Open Enrollment/School Attendance Areas

Attendance Boundaries/Assignment of Students to Schools

1. Students living within the attendance boundaries of individual schools have priority for attendance at that school.
2. Parents or guardians may make application to enroll in a school other than their attendance boundary area school.
- ~~3. The superintendent will set enrollment caps at each school.~~
 - ~~a. Enrollment caps for 2022-2023 are:~~
 - ~~- Cascades—350 students~~
 - ~~- Green Acres—350 students~~
 - ~~- Hamilton Creek—350 students~~
 - ~~- Lacomb—250 students~~
 - ~~- Pioneer—450 students~~
 - ~~- Riverview—450 students~~
 - ~~- Seven Oak—650 students~~
 - ~~b. The cap does not apply to siblings of students currently enrolled in that school.~~
4. Parents choosing to send their student to a school other than the school in their attendance boundary area will be responsible for transportation to and from school unless space is available on a district bus that travels an appropriate route. Routes will not be altered to accommodate open enrolled students.

Open Enrollment Process

1. Parents desiring to enroll a student in a district school in an attendance area other than the one in which they reside must complete an “Application for Open Enrollment” form and submit it to the superintendent’s office or their attendance area school by June 1st. Parents may submit individual student or family applications.
- ~~2. These applications will be approved unless one of the following situations exists:~~
 - ~~a. The school’s enrollment capacity has been met.~~
 - ~~b. The classrooms at the student’s instructional level are full. Full is defined as follows:~~

~~Grades K-2 23 students;~~

~~Grades 3-8 28 students;~~

2. Applications will be approved on a case by case basis dependent upon the nature of the request or severity of the need for school change.

3. A letter noting the district's decision made will be mailed to the parent and the schools concerned no later than August 15th.

4. ~~If there are more students requesting open enrollment into a school than there are spaces provided by the enrollment cap, then a lottery (See Lottery Policy JEC-AR (2)) will be used to create a rank order of students. This same process will be used in elementary schools if more students are requesting open enrollment into an instructional level than there are spaces available at that level.~~

~~To be included in this lottery, open enrollment requests must be submitted to the students' attendance area school no later than June 1st. This lottery will take place no later than August 14th.~~

~~If spaces are available in August as a result of students leaving the district during the summer, students will be placed according to the remaining rank order created by the lottery described above. This placement will occur prior to the first day of school.~~

5. Once approved an open enrollment will ordinarily remain in effect until the student completes the highest level of instruction in the school; the student's parent requests that the open enrollment be rescinded; or administrators revoke the open enrollment for reasons such as erratic attendance, excessive tardiness, inappropriate behavior, or other unsatisfactory performance., ~~as defined below:~~

- ~~• Student arrives tardy on more than 10% of school days~~
- ~~• Student is absent on more than 10% of attendance days~~
- ~~• Student has one expulsion or more than two suspensions~~

If a student's open enrollment to a K-5 or K-6 feeder school is in good standing in accordance with the above definitions, then the student's open enrollment will continue to be in effect for the middle school considered boundary to that feeder school.

6. Late open enrollment applications (received after June 1st) will ordinarily not be approved and will only be accepted on a case by case basis, subject to school and instruction level capacity.

Lottery Procedures

1. Open enrollment applications which have been submitted in a timely manner will be honored except in the following cases:
 - a. The school's enrollment cap has been reached. (However, student openings below the enrollment cap may be held for enrolling students new to the attendance area.)
 - b. The classrooms at the student's instruction level are full.
2. When honoring all of the open enrollment applications would cause the school to exceed its enrollment cap or would cause an elementary school to exceed its class size limit, we will determine which students will be enrolled using the following process:
 - a. First to be enrolled will be siblings of a student already enrolled at the school that have open enrollments in good standing approved from previous years.
 - b. Second to be enrolled will be students who previously resided in the school boundary and were enrolled in the school but who have moved to the attendance area of another district school.
 - c. Third to be enrolled will be all other local district students.
 - d. Fourth to be enrolled will be students from outside the district (interdistrict transfer students)

Lebanon Community Schools

Code: **JEC-AR (3)**

Revised/Reviewed: 4/15/10; 1/20/11, 4/14/16,
10/13/16, 2/9/17, 1/11/18,
9/8/22

Orig. Code(s): JEC-AR (C)

Application for Open Enrollment

Name of parent/guardian: _____ Date: _____

Telephone number: _____

Address: _____

I am requesting open enrollment for my child(ren) named below to attend:

instead of: _____
(first choice school requested)
(optional - second choice school requested):
(optional - third choice school requested):
(attendance area school)

Name(s) of student(s): 1) _____ Grade: _____ (2023-2024)
2) _____ Grade: _____ (2023-2024)
3) _____ Grade: _____ (2023-2024)
4) _____ Grade: _____ (2023-2024)

Reason for request:

Would you like each student considered for open enrollment on an individual basis or would you like your students to be considered together? Mark the appropriate box below.

☐ Individual student

☐ Students together

Applications for the upcoming school year must be received by the attendance area school by **June 1st**.
Summary of open enrollment conditions and procedures included on reverse side. The district will not pay for transportation or any excess costs.

I have read, understand and will abide by the conditions written on the back of this form.

Parent/Guardian

Date

Date Received: _____ ☐ Approved ☐ Denied ☐ Approval Pending _____

Signature of superintendent: _____

Reason for denial: _____

Application for Open Enrollment - JEC-AR (3)

1-2

Open Enrollment Summary

1. Parents desiring to enroll a student in a district school in an attendance area other than the one in which they reside must complete an “Application for Open Enrollment” form and submit it to the superintendent’s office or their attendance area school by June 1st. Parents may submit individual student or family applications.
 - ~~2. These applications will be approved unless one of the following situations exists:~~
 - ~~a. The school’s enrollment capacity (on June 1st of the previous year) has been met:~~
 - ~~- Cascades—350 students~~
 - ~~- Green Acres—350 students~~
 - ~~- Hamilton Creek—350 students~~
 - ~~- Lacombe—250 students~~
 - ~~- Pioneer—450 students~~
 - ~~- Riverview—450 students~~
 - ~~- Seven Oak—650 students~~
 - ~~b. The classrooms at the student’s instructional level are full. Full is defined as follows:~~
 - ~~- Grades K-2—23 students;~~
 - ~~- Grades 3-8—28 students;~~
 3. A copy of the open enrollment application form noting the district’s decision made will be mailed to the parent and the schools concerned no later than August 15th.
 - ~~4. If there are more students requesting open enrollment into a school than there are spaces provided by the enrollment cap, then a lottery will be used to create a rank order of students.~~
 5. Once approved an open enrollment will ordinarily remain in effect until the student completes the highest level of instruction in the school; the student’s parent requests that the open enrollment be rescinded; or administrators revoke the open enrollment for reasons such as erratic attendance, excessive tardiness, inappropriate behavior, or other unsatisfactory performance., ~~as defined below:~~
 - ~~• Student arrives tardy on more than 10% of school days~~
 - ~~• Student is absent on more than 10% of attendance days~~
 - ~~• Student has one expulsion or more than two suspensions~~
- If a student’s open enrollment to a K-5 or K-6 feeder school is in good standing in accordance with the above definitions, then the student’s open enrollment will continue to be in effect for the middle school considered boundary to that feeder school.
6. Parents choosing to send their student to a school other than the school in their attendance boundary area will be responsible for transportation to and from school unless space is available on a district bus that travels an appropriate route. Routes will not be altered to accommodate open enrolled students.
 7. Late open enrollment applications (received after June 1st) will ordinarily not be approved and will only be accepted on a case by case basis, subject to school and instruction level capacity.

OSBA Model Sample Policy

Code: IIA-AR(1)
Revised/Reviewed:

Instructional Materials/Program Adoption Procedure

1. Prior to an adoption study, teachers, administrators, parents, citizens and students may suggest materials they feel should be considered for adoption. Their specific suggestions or recommendations should be submitted to the curriculum coordinator/curriculum administrator ~~of the content area to be reviewed.~~
2. The curriculum coordinator/curriculum administrator will compile and present all suggestions listed in Step 1 to the ~~review adoption~~ committee. The ~~review adoption~~ committee will be comprised of ~~the curriculum committee and at least two~~ parents selected by the curriculum coordinator/curriculum administrator, ~~parents and/or community members and other district staff selected by the curriculum coordinator/curriculum administrator~~ to represent elementary and secondary levels. ~~At a minimum, 50% of the adoption committee membership shall be comprised of teachers who are impacted by the curriculum being adopted.~~
3. In order to inform constituents of the review process, an announcement will be made at a regular Board meeting, ~~a press release will be written and parents will be notified at each building~~ within one month of the committee's first meeting.
4. The committee will conduct a preliminary study of materials suitable for basic adoption. Publishers and curriculum consultants may be invited to participate in the study. Material under consideration for adoption by the committee will be available for review by district constituents upon request. An evaluation/rating instrument will be employed for all program/instructional materials considerations. ~~This evaluation/rating instrument may include those already completed by outside agencies (such as the Oregon Department of Education or the non-profit EdReports).~~ The committee will decide whether to first initiate a pilot or trial use of a particular series or text or to proceed directly with an adoption. Any trial use or pilot should be coordinated and compatible with the proposed revisions in the curriculum guide. The proposed pilot or trial use must have approval of the principal and the teachers involved.
5. After a trial use in the classroom and/or committee review, the committee will release results of its evaluation on the programs/instructional materials studied to the ~~[superintendent]~~ [cabinet]. Specific recommendations will be prepared and forwarded to the [superintendent] ~~[cabinet]~~. The committee must show evidence of having used an evaluation or instrument to ensure conformity with curriculum program goals.
6. The [cabinet] will review the recommended adoption and ensure that:
 - a. Appropriate procedures have been complied with;
 - b. Compatibility exists with other texts or skills presented at the same grade level in other curriculum areas;
 - c. The cost is within budgeted amounts.

The [cabinet] may forward a recommendation to the superintendent either accepting the adoption proposal or referring it back to the committee for revision or further study.

7. The superintendent will decide after reviewing the recommendation to either send the proposal back to the committee for further review or to forward it to the Board for approval.
8. The Board may rule on the adoption recommendation or direct the superintendent to further action as it deems appropriate or conducive to reach established goals and objectives.
9. It is the principal's responsibility to implement and maintain the district-adopted instructional materials/programs. Exceptions to the district-adopted instructional materials/programs could occur only ~~after following the procedure defined below;~~ when written permission is granted by the superintendent and/or their designee.
 - a. ~~If a teacher has a concern regarding the effectiveness/appropriateness of the program adoption in the teacher's assignment area, the teacher may submit that concern in writing to the administrator. If the administrator shares that concern, the administrator may refer the concern to the superintendent. The superintendent will refer the concern to the curriculum administrator/coordinator for a recommendation. The superintendent will issue a decision on the concern after receiving the recommendation;~~
 - b. ~~If an administrator has a concern regarding the effectiveness/appropriateness of the program adoption, or if the administrator would like to field test/pilot a specific program, the concern or the request to pilot/field test must be submitted to the superintendent for a decision. Should any pilot or field test justify continuation beyond a single school year, the continued use requires the superintendent's approval.~~

OSBA Model Sample Policy

Code: IIA-AR(2)
Revised/Reviewed:

Challenge of Instructional Materials

1. Inquiries

- a. Any inquiry made to an administrator regarding instructional material by any person(s) shall be made known to the staff member(s) using the material. The staff member(s) shall be made aware of the person(s) making the inquiry.
- b. The administrator shall then arrange for the person(s) making the inquiry to meet with the staff member(s) using the material in an effort to resolve the issue informally.
- c. The administrator shall inform the person(s) making the inquiry that if they are not satisfied with the outcome of the informal process, they may file a formal written challenge.

2. Challenges

- a. All formal challenges shall be in writing [on the district form prepared for this purpose] and must be submitted to the superintendent.
- b. Upon receipt of a written challenge, the superintendent shall, within [10] [student contact] days, [activate] [appoint] the [review committee] and provide a copy of the written challenge to the staff member(s) involved.
- c. The [review committee] shall consider the challenge within [10] [student contact] days of the committee's [activation] [appointment] by the superintendent.
- d. The [review committee], once [activated] [appointed], shall recommend to the superintendent whether or not the challenged material should be withdrawn from use during the review process. The superintendent may withdraw challenged material following receipt of the recommendation from the [review committee] until final resolution is reached by the Board.
- e. Following a review of the challenged material, the [review committee] shall submit its report and recommendation to the superintendent for presentation to the Board. Copies of the recommendation shall be provided to the person(s) filing the challenge and to the staff member(s) involved.
- f. The Board shall announce its decision at the next Board meeting following receipt of the committee's recommendation. If the Board's decision is contrary to the recommendation of the [review committee], the reasons will be communicated, in writing, to the [review committee].
- g. [The review committee shall be appointed by the superintendent and shall be composed as follows:

~~(1) [District employees (3-7):] [Patrons (2-3-6):]~~

~~Representing the high school level~~ ~~Representing the high school level~~
~~representing the middle school level~~ ~~representing the middle school level~~
~~representing elementary school level~~ ~~representing elementary school level~~
~~representing the district at large~~ ~~representing the district at large;~~
~~administrator];~~

(1) District employees (3 - 7):

- One licensed teacher(s) representing each level(s) of school (elementary/middle/high) at which the material(s) are used
- One administrator representing the level(s) of school (elementary/middle/high) at which the material(s) are used
- One district employee representing the district at large

Patrons (2 - 3)

- One patron representing the level(s) of school (elementary/middle/high) at which the material(s) are challenged
- (Up to two) patron(s) representing the district at large

- (2) [~~At least four of the district employees shall be licensed teachers.~~ Members shall be selected from a list of people having expressed their willingness to serve on this committee];
- (3) [~~Members will serve terms of [three] years on a rotating basis with the initial terms set by the superintendent (one third shall serve one year, one third shall serve two years, and one third shall serve three years)];~~
- (4) The [review committee] shall be chaired by a [district office] administrator appointed by the superintendent and shall be a non-voting member of the committee;
- (5) The committee chair shall be responsible for documenting all proceedings, for adherence to established procedures and guidelines and for preparing and presenting the report and recommendation to the Board based on the minutes of the meeting(s). Additionally, the chair will send copies of the committee's report and recommendation to the person(s) filing the challenge and the staff member(s) involved.

3. Procedures to be followed by the [review committee]:

- a. Review "Challenge of Instructional Material" administrative regulation;
- b. Establish a calendar for the review of the challenged material;
- c. Review the challenged material considering the theme, concept, vocabulary, and illustrations as they apply to:
 - (1) The appropriateness of the material for the instructional objectives established for the lesson(s) in which it was used, including its presentation and follow-up;
 - (2) The appropriateness of the material's level of difficulty; and
 - (3) The appropriateness of the material for the age group(s) with which it was used.
- d. Request that the staff member(s) involved submit a written explanation of their use of the challenged material, specifically addressing its relationship to the established curriculum and course objectives;
- e. An opportunity will be provided to person(s) filing the challenge, staff member(s) involved, outside consultants, lay people, other staff members or other individuals to offer oral or written testimony on the challenge within such procedures and limitations as may be established by the chair with the consensus of the committee;
- f. Review and discuss possible options for recommendation, including:
 - (1) Continued use of the material as used, with no reservations;
 - (2) Restricted or modified use of the material in terms of subject area, grade level, etc.;

- (3) No further use of the material as a part of the regular or support curriculum in the district.
- g. Procedures for voting:
 - (1) A quorum (one-half the committee membership plus one) shall be present to act upon any business to come before the committee;
 - (2) All motions and votes shall be recorded and reported in the minutes of the meeting(s);
 - (3) Votes will be recorded from only the members present at the time of the vote;
 - (4) A simple majority of those present is required for a motion to pass;
 - (5) Roll call votes may be taken.
- h. Following the discussion and review of possible options for recommendation, a committee member may offer a motion outlining the committee's recommendation. Action shall be taken on that motion and any subsequent motions within the procedures outlined in section 3.g. above and consistent with parliamentary procedure;
- i. All meetings of the review committee are subject to the Public Records and Meetings Law pursuant to Oregon Revised Statute (ORS) 192.610 to 192.690.

OSBA Model Sample Policy

Code: IIA-AR(3)
Revised/Reviewed:

Challenge Request for Instructional Materials

(Submit to superintendent)

Title: _____ Publisher: _____ Date of Pub.: _____

Author _____

Type of media: ☐ Hardcover ☐ Paperback ☐ Digital ☐ Other: _____

Producer/Source (if known): _____

Request initiated by: _____ Phone _____

Address _____ City _____ Zip _____

Person making the request represents: ☐ Self ☐ Group or organization

Name of Group (or organization): _____

1. To what in the item do you object? (Please be specific and cite pages, frames, etc.)

2. In your opinion, what are the harmful effects upon students that might result from the use of this item?

3. Do you perceive any instructional value in the use of this item?

4. Did you review the entire item? ☐ Yes ☐ No

5. If not, what sections did you review? _____

6. Should the opinion of any additional experts in the field be considered? ☐ Yes ☐ No

7. Please list suggestions, if any: _____

8. What would you like the school to do about this material?

- ☐ Do not use it with my student.
- ☐ Withdraw it from use.
- ☐ Send it back to the selector or selectors for evaluation.
- ☐ Other _____.

9. In place of this item, would you care to recommend other material which you consider to be of equal or superior quality for the purpose intended?

10. Do you wish to make an oral presentation to the Review Committee? ☐ Yes ☐ No

If yes, please call the superintendent's office at [_____].

Signature

Date

References:

Agenda Item 6

Consent Agenda

B. Policy Updates Second Readings

Discrimination Complaint Procedure

Any person, including students, staff, visitors and third parties, may file a complaint.

Complaints regarding discrimination-or harassment, on any basis protected by law, shall be processed in accordance with the following procedures:

- Step 1: Complaints may be oral or in writing and must be filed with the administrator. The administrator shall determine the action to be taken, if any, and reply, in writing, to the complainant within ~~five~~ **ten** school days of receipt of the complaint.
- Any staff member that receives a written or oral complaint shall report the complaint to the administrator.
- Step 2: If the complainant wishes to appeal the decision of the administrator he/she may submit a written appeal to the superintendent or designee within ~~five~~ **ten** school days after receipt of the administrator's response to the complaint. The superintendent or designee may review the administrator's decision and may meet with all parties involved. The superintendent or designee will review the merits of the complaint and the administrator's decision and respond in writing to the complainant within ten school days.
- Step 3: If the complainant is not satisfied with the decision of the superintendent or designee, a written appeal may be filed with the Board within five school days of receipt of the superintendent's or designee's response to Step 2. The Board may decide to hear or deny the request for appeal. If the Board decides to hear the appeal, the Board may meet with the concerned parties and their representative at the next regular or special Board meeting. The Board's decision will be final and will address each allegation in the complaint and contain reasons for the Board's decision. A copy of the Board's final decision shall be sent to the complainant in writing or electronic form within ~~10~~ **30** days of ~~this meeting~~ **receipt of the appeal by the Board**.

If the administrator is the subject of the complaint, the individual may start at step 2 and file a complaint with the superintendent or designee. If the superintendent is the subject of the complaint, the complaint may start at step 3 and should be referred to the Board chair. The Board may refer the investigation to a third party.

Complaints against the Board as a whole or against an individual Board member, may start at step 3 and should be made to the Board chair and may be referred to district counsel. Complaints against the Board chair may start at step 3 and be made directly to the Board vice chair.

Timelines may be extended based upon mutual consent of both parties.

If the complainant is a person who resides in the district, is a parent or guardian of student who attends school in the district or is a student, and is not satisfied after exhausting local complaint procedures or after 90 days, whichever occurs first, he/she may appeal¹ in writing to the Superintendent of Public Instruction under Oregon Administrative Rule (OAR) 581-021-0049.

Charter Schools of which the District Board is a Sponsor

The district Board, through this administrative regulation, will not review an appeal of a decision reached by the Board of the Sand Ridge Charter School on a complaint alleging a violation of Oregon Revised Statute (ORS) 659.850 or Oregon Administrative Rule (OAR) 581-021-0045 or 581-021-0046 (Discrimination), for which the district Board has jurisdiction, and recognizes a decision reached by the Board of Sand Ridge Charter School as the district Board's final decision. A final decision reached by this district Board may be appealed to the Oregon Department of Education under OAR 581-002-0001 - 581-002-0023.

¹ An appeal must meet the criteria found in OAR 581-002-0005(1)(a).

DISCRIMINATION COMPLAINT FORM

Any person, including students, staff, visitors and third parties, may file a complaint.

Name of Person Filing Complaint Date School or Activity

Student/Parent ☐ Employee ☐ ~~Nonemployee~~ ☐ ~~(Job applicant)~~ Other ☐ _____

Type of discrimination:

- | | | |
|--|--|---|
| <input type="checkbox"/> Race | <input type="checkbox"/> Mental or physical disability | <input type="checkbox"/> Age |
| <input type="checkbox"/> Color | <input type="checkbox"/> Marital Status | <input type="checkbox"/> Sexual Orientation |
| <input type="checkbox"/> Religion | <input type="checkbox"/> Familial Status | <input type="checkbox"/> Pregnancy |
| <input type="checkbox"/> Sex | <input type="checkbox"/> Socio-Economic Status | <input type="checkbox"/> Discriminatory use of a Native American mascot |
| <input type="checkbox"/> National or ethnic origin | <input type="checkbox"/> Veterans' Status | <input type="checkbox"/> Other _____ |
| <input type="checkbox"/> Gender Identity | | |

Specific complaint: (Please provide detailed information including names, dates, places, activities and results of informal discussion.)

Who should we talk to and what evidence should we consider? _____

Suggested solution/resolution/outcome: _____

This complaint form should be mailed or submitted to the administrator.

Direct complaints related to educational programs and services may be made to the US Department of Education, Office for Civil Rights. Direct complaints related to employment may be filed with the Oregon Bureau of Labor and Industries, Civil Rights Division, or the U.S. Department of Labor, Equal Employment Opportunities Commission.

Hazing/Harassment/Intimidation/Bullying/Menacing/Cyberbullying or Teen Dating Violence Reporting Procedures – Student

Administrators¹ have responsibility for investigations concerning acts of hazing, harassment, intimidation or bullying, menacing, acts of cyberbullying, and incidents of teen dating violence. The investigator(s) shall be a neutral party having had no involvement in the report presented.

All reports will be investigated in accordance with the following procedures:

- Step 1 Any reports or information on acts of hazing, harassment, intimidation or bullying, menacing, acts of cyberbullying, or incidents of teen dating violence (complaints, rumors) shall be presented to the administrator. Reports against the principal shall be filed with the superintendent. Reports against the superintendent shall be filed with the Board chair. All such information will be reduced to writing and will include the specific nature of the offense and corresponding dates.
- Step 2 The administrator receiving the report shall promptly investigate. Parents will be notified of the nature of any report involving their student. The administrator will arrange such meetings as may be necessary with all concerned parties within ~~five~~ **ten** working days after receipt of the information or report. The parties will have an opportunity to submit evidence and a list of witnesses. All findings related to the report will be reduced to writing. The administrator conducting the investigation shall notify the person making the report within 10 working days of the information or report, and parents as appropriate, in writing when the investigation is concluded and a decision regarding disciplinary action, as warranted, is determined.
- ~~A copy of the notification letter or the date and details of notification to the person making the report, together with any other documentation related to the incident, including disciplinary action taken or recommended, shall be forwarded to the superintendent.~~
- Step 3 If the person making the report is not satisfied with the decision at Step 2, they may submit a written appeal to the superintendent or designee. Such appeal must be filed within 10 working days after receipt of the Step 2 decision. The superintendent or designee will arrange such meetings with the person making the report and other affected parties as deemed necessary to discuss the appeal. The superintendent or designee shall provide a written decision to the appeal within 20 working days.

¹ Required by ORS 339.356(2)(g).

Step 4 If the person making the report is not satisfied with the decision at Step 3, a written appeal may be filed with the Board. Such appeal must be filed within 10 working days after receipt of the Step 3 decision. The Board shall, within 20 working days, conduct a hearing at which time the person making the report shall be given an opportunity to present the report. The Board shall provide a written decision to the person making the report within ~~10~~ 30 working days ~~following completion of the hearing of receipt of the appeal by the Board.~~

Reports against the superintendent should be referred to the Board chair on behalf of the Board. The Board chair shall present the report to the Board. If the Board decides an investigation is warranted, the Board may refer the investigation to a third party. When the investigation is complete, the results will be presented to the Board. After receiving the results of the investigation, the Board shall decide, ~~with 20 days,~~ in open session what action, if any, is warranted. ~~A final decision will be made within 30 days of receipt of report.~~

Reports against the Board as a whole or against an individual Board member should be made to the Board chair on behalf of the Board. The Board chair shall present the report to the Board. If the Board decides an investigation is warranted, the Board may refer the investigation to a third party. When the investigation is complete, the results will be presented to the Board. After receiving results of the investigation, the Board shall decide, ~~within 20 days,~~ in open session what actions, if any, is warranted. ~~A final decision will be made within 30 days of receipt of the report.~~

Reports against the Board chair may be made directly to the ~~district counsel~~ Board vice chair on behalf of the Board. The Board vice chair shall present the report to the Board. If the Board decides an investigation is warranted, the Board may refer the investigation to a third party. When the investigation is complete, the results will be presented to the Board. After receiving the results of the investigation, the Board shall decide, ~~with 20 days,~~ in open session what action, if any is warranted. ~~A final decision will be made within 30 days of receipt of the report.~~

Timelines may be extended upon written agreement between both parties. This also applies to reports filed against the superintendent or any Board member.

Direct complaints of discriminatory harassment related to educational programs and services may be made to the Regional Civil Rights Director, U.S. Department of Education, Office for Civil Rights, Region X, 915 Second Ave., Room 3310, Seattle, WA 98174-1099.

Documentation related to the incident may be maintained as a part of the student's education records. Additionally, a copy of all reported acts of hazing, harassment, intimidation or bullying, menacing, or cyberbullying, or incidents of teen dating violence and documentation will be maintained as a confidential file in the district office.

Expulsion**

A principal, after reviewing available information, may recommend to the superintendent that a student be expelled. Expulsion of a student shall not extend beyond one calendar year.

A student may **only** be expelled for any of the following circumstances:

1. When a student's conduct poses a threat to the health or safety of students or employees;
2. When other strategies to change the student's **conduct-behavior** have been ineffective, except that expulsion may not be used to address truancy; or
3. When required by law.

The use of expulsion for discipline of a student in fifth grade or lower is limited to:

1. Nonaccidental conduct causing serious physical harm to a student or employee;
2. When a school administrator determines, based on the administrator's observations or upon a report from an employee, the student's conduct poses a **direct** threat to the health or safety of students or employees; or
3. When the expulsion is required by law.

The age of the student and the past pattern of behavior will be considered prior to imposing the expulsion.

No student may be expelled without a hearing unless the student's parents, or the student if 18 years of age, waive the right to a hearing, either in writing or by failure to appear at a scheduled hearing. ~~By waiving the right to a hearing, the student and parent agree to abide by the findings of a hearings officer.~~

The Board delegates the authority to decide on an expulsion to the superintendent.¹ The superintendent may designate another person to handle the potential expulsion, and the superintendent, a designee or another individual may act as the hearings officer. The district may contract with an individual who is not employed by the district to serve as the hearings officer. The hearings officer will not be associated with the initial actions of the building administrators. The hearings officer will conduct the hearing and make a

¹ The Board can retain authority for all expulsions. If the Board chooses not to delegate this authority, any recommendations for expulsion from administration would come to the Board for resolution. The Board would have to meet and determine next steps for all expulsions.

final decision regarding the expulsion. A decision of the hearings officer may be appealed by the parent or the student if age 18 or over to the Board for review.

If the decision of the hearings officer is appealed to the Board for review, the findings as to the facts and the hearings officer's decision will be submitted to the Board, and will be available in identical form to the Board, the student and the student's parents at the same time. At a future meeting, the Board will review the hearings officer's decision and will affirm, modify or reverse the decision.

When a ~~recommendation for an expulsion is made and a n-expulsion~~ hearing is not waived, the following procedure is required:

1. Notice will be given to the student and the parent by personal service² or by certified mail³ at least five days prior to the scheduled hearing. Notice shall include:
 - a. The specific charge or charges ~~and the specific facts that support the charge or charges;~~
 - b. ~~The conduct constituting the alleged violation, including the nature of the evidence of the violation and reason for expulsion;~~
 - c.
 - d. ~~A recommendation for expulsion~~ statement of intent to consider the charges as reason for expulsion;
 - e. The student's right to a hearing;
 - f. When and where the hearing will take place; and
 - g. The ~~student may be represented by counsel or other persons~~ ~~right to representation.~~
2. ~~The Board may expel, or may delegate the authority to decide on an expulsion to the superintendent or superintendent's designee, who may also act as the hearings officer. The district may contract with an individual who is not employed by the district to serve as the hearings officer. The hearings officer designated by the Board will conduct the hearing and will not be associated with the initial actions of the building administrators;~~
3. ~~Expulsion hearings will be conducted in private and will not be open to the general public unless the student or the students' parents request an open session;~~
4. ~~If in case~~ the parent or student ~~has difficulty understanding~~ ~~does not understand~~ the English language ~~or has other serious communication disabilities,~~ the district will provide an interpreter during the hearing ~~translator;~~ All communications will be in a manner that is understandable to the parents and student;

²The person serving the notice shall file a return of service. (OAR 581-021-0070)

³When "certified mail is given to a parent of a suspended student, the notice shall be placed in the mail at least five days before the date of the hearing." (OAR 581-021-0070)

5. The student shall be permitted to have representation present at the hearing to advise and to present arguments. The representation may be an attorney, ~~and/or parent or other person~~. The district's attorney may be present;
6. The student shall be afforded the right to present their version of the events underlying the expulsion recommendation and to introduce evidence by testimony, writings or other exhibits;
7. The student shall be permitted to be present and to hear the evidence presented by the district;
8. The hearings officer or the student may record the hearing;
9. Strict rules of evidence shall not apply to the proceedings. However, this shall not limit the hearings officer's control of the hearing;
10. ~~If the Board is conducting the expulsion hearing, the Board may designate the Board chair or a third party as the hearings officer. The hearings officer will determine the facts of each case on the evidence presented at the hearing. Evidence may include the relevant past history and student education records. The hearings officer will provide to the Board, findings as to the facts, the recommended decision and whether or not the student has committed the alleged conduct.. This will include the hearings officer's recommended decision on disciplinary action, if any, including the duration of any expulsion. This material will be available in identical form to the Board, the student if age 18 or over and the students' parents at the same time. Following the review by the Board of the hearings officer's recommendation, the Board will make the final decision regarding the expulsion;~~
11. ~~If the Board has delegated authority to the superintendent or designee to act as the hearings officer, the superintendent may designate themselves, or a third party, as the hearings officer. The hearings officer's decision is final. However, a decision of the hearings officer may be appealed by the parent or the student if age 18 or over to the Board for review. If the decision of the hearings officer is appealed to the Board for review, the findings as to the facts and the hearings officer's decision will be submitted to the Board, and will be available in identical form to the Board, the student and the students' parents at the same time. At its next regular or special meeting the Board will review the hearings officer's decision and will affirm, modify or reverse the decision.~~
12. A ~~Board-conducted hearing or a~~ Board review of the hearings officer's decision will be conducted in executive session unless the student or the student's parent requests a public hearing. If an executive session is held by the Board or a private hearing held by the hearings officer, the following will not be made public:
 - a. The name of the minor student;
 - b. The issues involved, including a student's confidential records;
 - c. The discussion;
 - d. The vote of Board members, which may be taken in executive session when considering an expulsion.

Prior to expulsion, ~~the district must propose alternative programs of instruction or instruction combined with counseling to a student subject to expulsion~~ for reasons other than a weapons ~~policy~~ violation, the district must notify the student and parents of alternative programs of instruction or instruction combined with counseling and document this notification. ~~The district must document to the parent of the student that proposals of alternative education programs have been made.~~

END OF POLICY

Legal Reference(s):

[ORS 192.660](#)
[ORS 332.061](#)
[ORS 336.615](#) to -336.665
[ORS 339.115](#)
[ORS 339.240](#)
[ORS 339.250](#)
[OAR 581-021](#)-0050 to 021-0075

[House Bill 2514 \(2019\)](#)

Agenda Item 7

Department Reports

C. Financial Report

BOARD MEMORANDUM



To: The Honorable Chair and Members
Lebanon Community School District Board of Directors

From: William H. Lewis III, Business Director

Date: May 4, 2023 **Meeting Date:** May 11, 2023

Re: Financial Report and Fiscal Updates

Financial Report

The 2022-2023 Financial Board Report included in this packet reflects all revenues and expenditures for 2018-2022 and the budgeted YTD expenditures, plus encumbered amounts for 2022-2023 as of 5/04/23.

2021-22 Audit Report-

Lebanon's 2021-22 audit report is working through the final compliance review at our audit firm. The district's audit firm is experiencing labor shortages which have slowed the final process. We will present the final findings of the audit at the June school board meeting.

Seven Oak Project-Administration is asking for approval of Guaranteed Maximum Price (GMP) for Seven Oak. HMK has finalized all work for the Amendments with GBC Construction and agrees with this recommendation.

	18/19 Actual	19/20 Actual	20-21 Budget	21-22 Budget	22-23 Budget	5-04-23 YTD	5-04-23 Balance
General Fund - Revenue							
SSF Formula	39,748,844	42,038,081	43,560,057	44,440,549	45,499,998	42,877,153	2,622,845
SSF Adjustment	-	-	-	-	-	-	-
State Fiscal Stabilization Fund		-	-	-	-	-	-
Federal Ed Jobs		-	-	-	-	-	-
School Year SubAccount		-	-	-	-	-	-
Loan Receipts		-	-	-	-	-	-
Interest	385,564	320,317	250,000	150,000	250,000	455,673	(205,673)
Third Party Billing	72,372	-	-	-	-	-	-
TMR	180,556	212,376	210,000	210,000	210,000	97,500	112,500
JROTC	35,236	77,982	65,000	65,000	65,000	63,582	1,418
Other	374,395	325,816	387,500	368,266	580,500	198,859	381,641
Interfund Transfer	8,029	850,000	-	-	-	-	-
BFB	5,263,314	2,126,603	3,784,307	5,065,000	5,180,500	6,108,409	(927,909)
Total	46,068,310	45,951,175	48,256,864	50,298,816	51,785,998	49,801,176	1,984,822
=====	=====	=====	=====	=====	=====	=====	=====
General Fund - Expenses							
Salaries	21,069,833	21,896,193	21,680,883	22,526,487	23,036,272	22,998,467	37,804
Benefits	13,157,764	14,481,355	15,086,873	14,597,973	15,115,726	14,241,530	874,195
P. Services	5,396,276	5,349,577	5,299,827	5,686,551	5,877,223	5,178,776	698,447
Supplies	1,269,608	1,569,846	1,530,133	1,606,583	1,882,175	1,449,793	432,382
Capital Outlay	76,554	54,500	90,000	100,000	70,000	156,582	(86,582)
Other Objects	350,672	441,468	469,147	501,776	520,603	505,670	14,933
Transfers	2,621,000	1,185,000	2,100,000	2,279,446	2,284,000	2,284,000	-
Contingency	-	1,750,000	2,000,000	3,000,000	3,000,000	-	3,000,000
Total	43,941,707	46,727,940	48,256,864	50,298,816	51,785,998	46,814,817	4,971,181
=====	=====	=====	=====	=====	=====	=====	=====

2022-23 General Fund Revenue Report

		18/19 Actual	19/20 Actual	20-21 Budget	21-22 Budget	22-23 Budget	45,050 YTD	45,050 Balance
	SSF Formula							
1111,	Taxes	10,179,205	10,509,179	10,938,094	11,873,719	12,150,243	11,764,007	386,237
4801,4899	Federal Forest Fees	179,478	157,804	130,000	125,000	120,000	-	120,000
3103	Common School	437,082	196,120	400,000	444,819	445,000	500,229	(55,229)
2101	County School		209,250	200,000	195,000	50,000	27,380	22,620
3104	State Timber	167,048	23,587	100,000	100,000	130,000	67,335	62,665
3101/3199	School Support Fund	29,101,930	30,942,140	31,791,963	31,702,011	32,604,755	30,518,203	2,086,552
	Adjustments to SSF Payments							-
	Adj for Prior Year payments	(755,646)						-
	Adj for HC Disability Grant	439,748	-	-		-	-	-
	Total SSF Formula	39,748,844	42,038,081	43,560,057	44,440,549	45,499,998	42,877,153	2,622,845
1510	Interest on Investments	385,564	320,317	250,000	150,000	250,000	455,673	(205,673)
4200	Third Party billing	72,372	-	-	-	-	-	-
2210	TMR	180,556	212,376	210,000	210,000	210,000	97,500	112,500
4300	JROTC reimbursement	35,236	77,982	65,000	65,000	65,000	63,582	1,418
	Other							-
1741	Outdoor School		-	-	-	-	-	-
1910	Rental Fees	3,926	1,582	7,500	5,000	-	1,303	(1,303)
1980	Fees Charged to Grants	-	14,915	50,000	108,266	110,000	25,277	84,723
1312, 1960, 1990,								
5300	Miscellaneous	370,469	304,781	250,000	255,000	470,500	172,279	298,221
1760	Club Fundraising		-	-	-	-	-	-
1411, 1993	Transportation Fees		4,538	-	-	-	-	-
1994	E-Rate reimbursement	-	-	80,000	-	-	-	-
5200	Interfund Transfer - Athletics	8,029	850,000	-	-	-	-	-
5400	Beginning Fund Balance	5,263,314	2,126,603	3,784,307	5,065,000	5,180,500	6,108,409	(927,909)
	Total	46,068,310	45,951,175	48,256,864	50,298,816	51,785,998	49,801,176	1,984,822
		=====	=====	=====	=====	=====	=====	=====

2022-23 General Fund Expenditure Report

Description	18/19 Actual	19/20 Budget	20/21 Budget	21/22 Budget	22/23 Budget	5-04-23 YTD	5-04-23 Encumb	5-04-23 Balance
Certified salaries	12,295,790	12,665,056	12,540,564	12,871,079	13,169,912	8,805,085	4,286,607	78,221
Classified salaries	5,554,869	6,227,931	6,008,791	6,250,523	6,233,686	4,440,665	1,626,020	167,001
Administrative salaries	1,782,092	1,873,807	1,863,955	2,059,820	2,151,593	1,792,563	356,994	2,036
Managerial - classified	249,120	154,577	289,051	299,689	511,189	429,140	85,985	(3,936)
Retirement stipends	19,904	91,904	133,413	120,000	0	0	0	0
Confidential salaries	159,789	162,808	284,898	343,800	485,197	433,220	71,817	(19,841)
Certified subs	43,660	2,000	0	14,294	0	0	0	0
Classified subs	43,138	1,500	23,975	0	0	0	0	0
Temp certified	162,287	82,264	45,425	0	625	0	0	625
Temp classified	23,111	8,000	21,658	481	11,086	21,058	0	(9,972)
Student helpers salaries	4,413	21,000	16,654	5,748	9,173	15,593	0	(6,420)
Overtime	50,768	0	91,513	57,127	38,449	54,210	2,317	(18,077)
Compensation time	77,738	52,300	44,207	71,883	8,946	31,999	0	(23,054)
Extra duty	350,933	279,579	128,295	230,761	83,537	219,493	0	(135,956)
Classified extra hrs	200,393	208,000	0	0	0	0	0	0
Vacation Payoff	14,017	29,817	24,292	28,240	43,273	10,524	0	32,749
Mentor teacher pay	0	0	0	0	822	0	0	822
Personal Leave Payout	0	0	0	0	0	0	0	0
Department Head Extra Duty	788	6,000	30,000	0	0	0	0	0
Taxable Meal Reimbursement	2,073	0	809	2,000	396	806	0	(410)
Cell Phone Stipend		0	1,080	1,080	450	375	75	0
Travel Stipend		0	11,400	0	30,500	22,383	4,767	3,350
Club Advisor	34,950	29,650	120,904	169,964	257,438	143,660	143,112	(29,334)
Total Salaries	21,069,833	21,896,193	21,680,883	22,526,487	23,036,272	16,420,773	6,577,695	37,804
PERS	5,753,639	7,398,130	7,286,664	6,797,646	6,994,709	4,774,543	1,786,086	434,080
Social Security	1,544,838	1,655,388	1,642,024	1,627,475	1,759,624	1,210,231	460,653	88,739
Worker's Comp	210,272	293,025	275,747	189,328	196,035	85,638	26,092	84,305
Employee Ins - Admin	239,427	215,642	275,263	283,669	325,403	275,626	52,368	(2,591)
Employee Ins - Certified	2,829,522	2,449,421	2,756,998	2,840,563	3,029,490	2,022,786	975,673	31,030
Employee Ins - Classified	2,408,513	2,327,520	2,596,579	2,598,694	2,651,363	1,744,344	623,511	283,509
Employee Ins - Other	36,487	33,429	65,298	92,498	110,502	90,659	16,371	3,471
Employee Ins - Retired	120,255	83,600	52,700	120,000	0	20,250	0	(20,250)
TSA	24,336	25,200	45,600	45,600	48,600	70,135	6,562	(28,098)
Total Benefits	13,157,764	14,481,355	15,086,873	14,597,973	15,115,726	10,294,214	3,947,317	874,195

2022-23 General Fund Expenditure Report

Description	18/19 Actual	19/20 Budget	20/21 Budget	21/22 Budget	22/23 Budget	5-04-23 YTD	5-04-23 Encumb	5-04-23 Balance
Instructional Services	125,368	103,800	76,375	66,000	161,000	78,343	1,400	81,257
Instr Prog Improve Service	33,042	53,000	67,750	87,750	56,200	24,684	730	30,786
Student SVCS	0	0	0	0	0	250	0	(250)
Data Processing SVCS	0	0	0	3,000	5,000	12,332	0	(7,332)
	0	0	0			0	0	0
Professional and Improvement Co	0	0	0	15,000	5,000	0	0	5,000
Other Instr-Prof-Tech SVCS	11,205	20,000	10,000	11,500	16,000	0	3,000	13,000
Cleaning SVCS	0	0	0			0	0	0
Repairs & Maintenance	206,884	190,300	227,612	258,500	286,050	347,431	7,379	(68,760)
Radio Service	12,455	11,100	11,100	15,000	4,500	15,939	120	(11,559)
Rentals	121,067	129,400	88,286	86,300	89,105	57,575	14,560	16,970
Electricity	453,206	502,620	465,700	451,500	450,500	337,116	91,361	22,022
Fuel	181,534	223,135	217,800	208,100	233,000	281,779	29,154	(77,933)
Water & Sewer	138,029	153,520	142,500	146,700	134,000	116,746	0	17,254
Garbage	112,864	102,400	87,000	106,500	104,500	87,504	30,282	(13,286)
Other Property Services	3,500	20,000	0	0	0	14,360	0	(14,360)
Reimb. Student Transportation	4,658	10,200	29,900	34,500	9,000	0	0	9,000
Reimb. Student Transportation	(79,915)				150,390	130,608	27,133	(7,352)
Travel	163,937	158,263	150,513	153,011	168,395	68,502	1,862	98,031
Travel - Local	0	0	0	0	0	0	0	0
Travel - Out of District	37	0	0		0	0	0	0
Travel - Student - Out of Dist.	1,140	5,300	4,500	3,500	0	0	0	0
Classified Staff Training	0	0	0		0	0	0	0
Travel - Other	0	0	0		0	0	0	0
Meals/Transportation	153	200	350	350	0	0	0	0
Mileage/Transportation	0	0	0		0	0	0	0
Staff Tuition	92,746	47,000	2,000	72,000	72,500	37,729	653	34,117
	0	0	0		0	0	0	0
Telephone	44,987	73,165	65,100	52,300	73,250	51,785	12,090	9,376
Postage	24,224	26,074	28,900	32,117	31,500	18,543	9,526	3,431
Advertising	2,761	4,300	2,650	3,500	5,500	0	0	5,500
Printing & Binding	13,712	29,400	30,950	31,700	44,500	22,947	0	21,553
Other Communication Services	0	0	0			0	0	0
Charter School Payments	2,159,564	2,195,000	2,300,000	2,400,000	2,540,000	2,257,929	282,071	0
Insurance Reimbursement	0	0	0	0	0	0	0	0
Tuitions Payments to Other Dist.	0	0	0	0	0	0	0	0
	0	0	0	0	0	0	0	0
Tuition Pay Private School	0	5,000	0	0	0	0	0	0
Other Tuition	240,090	92,500	90,000	115,000	95,600	5,500	0	90,100
Audit Services	29,150	30,000	39,000	36,000	45,000	0	0	45,000
Legal Services	33,971	35,000	35,000	35,000	30,000	50,052	0	(20,052)
Architect/Engineer Service	0	0	0	0	0	0	0	0
Negotiation Services	0	10,000	5,000	1,000	1,000	0	0	1,000
Management Services	0	0	0	0	0	31,115	0	(31,115)
Data Processing SVCS	65,278	89,600	65,000	57,500	57,000	0	0	57,000
Statistical Services		0	0	0	0	0	0	0
Election Services	4,632	5,000	5,000	18,000	5,000	0	0	5,000
Other Non_instr Pro/Tech	447,701	363,700	351,450	402,650	379,154	135,682	45,751	197,722
Other General Prof & Tech Svcs	(722)	0	0	0	0	0	0	0

2022-23 General Fund Expenditure Report

Description	18/19 Actual	19/20 Budget	20/21 Budget	21/22 Budget	22/23 Budget	5-04-23 YTD	5-04-23 Encumb	5-04-23 Balance
Physical Exams - Drivers	4,072	4,400	5,750	5,500	8,000	5,886	735	1,379
Drug Tests Drivers	1,670	3,000	2,250	3,000	2,500	780	1,220	500
Child Care Services	0	15,000	0	0	0	0	0	0
Sub calling service	14,113	15,000	12,000	7,500	7,500	0	0	7,500
Classified subs	226,030	194,000	228,600	251,500	191,831	87,973	0	103,858
Criminal History checks	3,394	3,200	3,500	3,500	500	1,893	0	(1,393)
Fingerprinting	626	1,000	2,500	1,000	1,000	0	0	1,000
Classified subs	499,112	425,000	445,791	510,573	413,248	337,088	0	76,160
Total P. Services	5,396,276	5,349,577	5,299,827	5,686,551	5,877,223	4,619,747	559,028	698,447
Gas Oil & Lubricants	185,324	190,500	189,100	192,000	248,000	179,664	62,867	5,469
Supplies & Materials	457,850	648,024	651,837	698,023	996,751	570,786.41	43,981.92	381,983
Vehicle repair parts	27,649	52,800	50,500	50,500	61,500	75,463	5,009	(18,972)
Transportation operations	30,665	15,000	25,000	25,000	25,000	14,729	6,856	3,415
Textbooks	68,642	28,033	9,933	5,433	21,500	30,345	0	(8,845)
Library Books	5,914	15,694	8,200	11,700	12,750	4,259	0	8,491
Periodicals	6,511	6,000	10,800	12,100	12,150	12,935	11,521	(12,306)
Equipment under 5K	160,140	178,842	146,100	125,550	72,800	70,021	0	2,779
Computer software	184,472	264,360	257,398	323,918	339,174	259,157	35,712	44,305
Computer hardware	142,441	170,593	181,265	162,359	92,550	66,487	0	26,063
Total Supplies & Materials	1,269,608	1,569,846	1,530,133	1,606,583	1,882,175	1,283,846	165,947	432,382
Buildings Acquisition		0	0	25,000	25,000	1,250	0	23,750
Improvements Other Than Buildings				0	0	0	0	0
Equipment	33,623	54,500	25,000	45,000	0	0	0	0
New Equipment over 5K	35,353	0	45,000	10,000	22,500	83,143	0	(60,643)
Replace of Equip over 5K		0	20,000	20,000	22,500	34,665	37,524	(49,689)
Depreciable Technology	7,579	0	0	0	0	0	0	0
Bus Replacement	0	0	0	0	0	0	0	0
		0		0	0	0	0	0
Total Capital Outlay	76,554	54,500	90,000	100,000	70,000	119,058	37,524	(86,582)
Regular Interest	0	500	0	0	0	0.00	0.00	0
		0	0	0	0	0	0	0
Dues & Fees	105,393	175,180	159,726	148,076	122,303	117,016.09	0.00	5,287
Insurance & Judgments	245,279	265,588	306,221	350,000	395,000	387,576	0	7,424
		0	0	0	0	0	0	0
Fidelity Bond Premiums	0	0	0	0	0	0.00	0.00	0
Property Insurance Premium		0	0	0	0	100	0	(100)
		0	0	0	0	0.00	0.00	0
Judgments & Settlements		0	2,500	3,000	2,500	0	0	2,500
Settlements		0	0	0	0	0	0	0
		0	0	0	0	0	0	0
Taxes & Licenses	0	200	700	700	800	977	0	(177)
					0	0	0	0
Total Other Objects	350,672	441,468	469,147	501,776	520,603	505,670	0	14,933

2022-23 General Fund Expenditure Report

Description	18/19 Actual	19/20 Budget	20/21 Budget	21/22 Budget	22/23 Budget	5-04-23 YTD	5-04-23 Encumb	5-04-23 Balance
Transfer - Vocational House Fund	40,000	0	70,000	250,000	450,000	450,000	0	0
Transfer - Technology	100,000	0	80,000	100,000	100,000	100,000	0	0
Transfer - Classroom Furniture	50,000	0	10,000	35,000	35,000	35,000	0	0
Transfer - Textbook Adoption	400,000	400,000	200,000	350,000	550,000	550,000	0	0
Transfer - Capital Improvement	400,000		200,000	300,000	50,000	50,000	0	0
Transfer - Track and Turf Fund	85,000	10,000	0	0	0	0	0	0
Transfer - Athletic Fund	446,000	450,000	475,000	475,000	475,000	475,000	0	0
Transfer - Bus Replacement	300,000	150,000	225,000	225,000	225,000	225,000	0	0
Transfer - Unemploy Ins	25,000	25,000	250,000	0	0	0	0	0
Transfer - OHC Fund	0			0	0	0	0	0
PERS Reserve	525,000	0	450,000	300,000	154,000	154,000	0	0
Transfer - Food Service	100,000	100,000	120,000	224,446	225,000	225,000	0	0
Transfer - Music/Band Replaceme	0	0	20,000	20,000	20,000	20,000	0	0
Transfer - Debt Service	150,000	50,000	0	0	0	0	0	0
Transfer - Academic Achievemen	0	0	0	0	0	0	0	0
Total Transfers	2,621,000	1,185,000	2,100,000	2,279,446	2,284,000	2,284,000	0	0
Reserve/Contingency	0	1,750,000	2,000,000	3,000,000	3,000,000	0	0	3,000,000
Grand Total	43,941,707	46,727,940	48,256,864	50,298,816	51,785,998	35,527,307	11,287,510	4,971,181
=====	=====	=====	=====	=====	=====	=====	=====	=====

Agenda Item 7

Department Reports

C. HMK Recommendation for GMP

BOARD APPROVAL



To: The Honorable Chair and Members
Lebanon Community School District Board of Directors

From: William H. Lewis III, Business Director

Date: May 10, 2023 **Meeting Date:** May 11, 2023

Re: Award Guaranteed Maximum Price (GMP) Amendment 2 to GBC Construction, LLC for the Seven Oak project.

Board Approval

The Lebanon Community School District Board of Directors approves the Guaranteed Maximum Price (GMP) Amendment 2 for the Seven Oak Classroom project to GBC Construction, LLC. for the additional Not to Exceed sum of \$3,299,217.84, for a total Not to Exceed Contract sum of \$3,973,922.74.

Motion Approved

Board Chair
Tom Oliver



May 11, 2023

Will Lewis, Business Director
Lebanon Community Schools
485 South 5th Street
Lebanon, Oregon 97355

RE: Lebanon Community Schools
Seven Oak Middle School
Classroom Addition Project –Bid Package 2
Recommendation to Accept GMP - Amendment 2

Dear Will,

After careful review and consideration, HMK Company recommends that you award Guaranteed Maximum Price (GMP) Amendment 2 to GBC Construction, LLC in the amount of \$3,299,217.84.

The original Contract amount of \$27,500.00, GMP Amendment 1 for \$647,204.90, and GMP Amendment 2 for above increase in scope for \$3,299,217.84 will bring the total Not to Exceed sum to \$3,973,922.74

We are asking that the District Board take action to award the CM|GC GMP Amendment 2 for the Seven Oak Middle School Classroom Addition Project to GBC Construction, LLC for the additional Not to Exceed sum of \$3,299,217.84 at the May 11, 2023, Board Meeting, for a Total Not to Exceed Contract sum of \$3,973,922.74.

If you have any questions, please do not hesitate to contact me to discuss.

Sincerely,

Skip A Hamilton

Skip A. Hamilton, CCM
Program Manager
HMK Company

Att: GMP 2 Contract Documents



Lebanon Community Schools – Seven Oak Middle School

AMENDMENT 02 – GMP

5/2/2023

Updated 5/9/2023

Table of Contents

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EXHIBIT B	Amendment 02 GMP Summary
	Amendment Reconciliation Sheet
	Cost of Work/General Conditions/Fee Matrix
	GC Estimate Detail for GMP
	Scope Clarifications
	Allowances
	Alternates
	Value Engineering Summary and Log
EXHIBIT C	Project Schedule
	Project Site Logistics

Lebanon Community Schools – Seven Oak Middle School

AMENDMENT 02 – GMP

5/2/2023

Updated 5/9/2023

EXHIBIT A – List of Drawings and Specifications

1. DRAWINGS – BY SODERSTROM ARCHITECTS 100% CD (Date Noted as 03.03.2023)

DWG	TITLE	DATE
	GENERAL	
	Cover Sheet	03.03.23
G1.01	Project Info	03.03.23
G2.01	Symbols, Legends and Accessibility	03.03.23
G3.01	Fire Life Safety Codes & Plans	03.03.23
	ARCHITECTURAL	
A0.11	Interior Assemblies	03.03.23
A0.12	Exterior Assemblies	03.03.23
A1.01	Architectural Site Plan	03.03.23
A2.01	Overall Floor Plan & Roof Plan	03.03.23
A3.01	Exterior Elevations	03.03.23
A3.11	Overall Building Sections	03.03.23
A3.21	Exterior Wall Sections	03.03.23
A4.01	Enlarged Plans	03.03.23
A5.01	Interior Elevation	03.03.23
A6.01	Overall Reflected Ceiling Plan	03.03.23
A8.01	Door Schedule and Frame Types	03.03.23
A8.02	Door and Window Details	03.03.23
A8.11	Exterior Details	03.03.23
A9.03	Interior Details – General	03.03.23
	INTERIOR	
I2.01	Interior Floor Finish Plan	03.03.23
	STRUCTURAL	
S1.01	Structural General Notes	03.03.23
S1.02	Special Inspection	03.03.23
S2.01	Foundation and Mezzanine Framing Plans	03.03.23
S3.01	Foundation and Mezzanine Framing Details	03.03.23
S4.01	Walkway Framing Plans and Details	03.03.23
	CIVIL	
C100	Cover Sheet	03.03.23

C101	Notes	03.03.23
C102	Overall Existing Conditions/Demo	03.03.23
C103	Existing Conditions/Demo	03.03.23
C104	Overall Site Plan	03.03.23
C105	Site Plan	03.03.23
C200	Overall Grading Plan	03.03.23
C201	Grading Plan	03.03.23
C202	Grading Details	03.03.23
C300	Overall Drainage Plan	03.03.23
C301	Drainage Plan	03.03.23
C400	Public Water Utility Plan	03.03.23
C401	Private Utility Plan	03.03.23
C500	Erosion Control Plan	03.03.23
C501	Erosion Control Details	03.03.23
C600	Details	03.03.23
	LANDSCAPE	
L100	Landscape Plan	03.03.23
	IRRIGATION	
IR100	Irrigation Plan	03.03.23
	MECHANICAL	
M2.00	Mechanical Floor, Mezzanine and Roof Plans	03.03.23
M4.00	Mechanical Sections	03.03.23
M5.00	Mechanical Controls	03.03.23
M6.00	Mechanical Legend & Schedules	03.03.23
M6.01	Mechanical Details	03.03.23
	PLUMBING	
P2.00	Plumbing Under Slab and Floor Plans	03.03.23
P6.00	Plumbing Legend, Schedules and Details	03.03.23
	ELECTRICAL	
E0.01	Electrical Symbol, Legend and Abbreviations	03.03.23
E0.02	One-Line Diagram and Electrical Schedules	03.03.23
E0.03	Luminaire Schedule	03.03.23
E0.04	Electrical Details	03.03.23
E1.01	Electrical Site Plan	03.03.23
E2.01	Lighting Floor Plans	03.03.23
E3.01	Power Floor Plans	03.03.23
E4.01	Low Voltage Plan	03.03.23
E5.01	Fire Alarm & Security Plans	03.03.23
E6.01	Panel Schedules	03.03.23

2. SPECIFICATIONS – BY SODERSTROM ARCHITECTS 100% CD

SECTION	TITLE	DATE
	DIVISION 00 – PROCUREMENT AND CONTRACTING REQUIREMENTS	
00 0101	Project Title Page	03/03/2023
00 0110	Table of Contents	03/03/2023
00 6113	Payment Bond	03/03/2023
00 6113	Performance Bond	03/03/2023
00 7343	Prevailing Wage Rate	03/03/2023
	DIVISION 1 – GENERAL REQUIREMENTS	
01 1000	Summary	03/03/23
01 2000	Price and Payment Procedures	03/03/23
01 2300	Alternates	03/03/2023
01 3000	Administrative Requirements	03/03/2023
01 3216	Network Analysis Schedule	03/03/2023
01 4000	Quality Requirements	03/03/2023
01 5000	Temporary Facilities and Controls	03/03/2023
01 5100	Temporary Utilities	03/03/2023
01 5713	Temporary Erosion and Sediment Control	03/03/2023
01 5721	Indoor Air Quality Controls	03/03/2023
01 6000	Product Requirements	03/03/2023
01 6023	Substitution Request Form	03/03/2023
01 6116	Volatile Organic Compound (VOC) Content Restrictions	03/03/2023
01 7000	Execution and Closeout Requirements	03/03/2023
01 7419	Construction Waste Management and Disposal	03/03/2023
01 7800	Closeout Submittals	03/03/2023
01 7900	Demonstration and Training	03/03/2023
	DIVISION 2 – EXISTING CONDITIONS	
	DIVISION 3 – CONCRETE	
03 1000	Concrete Forming and Accessories	03/03/2023
03 2000	Concrete Reinforcing	03/03/2023
03 3000	Cast-in-Place Concrete	03/03/2023
03 3543	Polish Concrete	03/03/2023
03 4500	Precast Architectural Concrete	03/03/2023
	DIVISION 4 – MASONRY	
04 2613	Masonry Veneer	03/03/2023
	DIVISION 5 – METALS	
05 1200	Structural Steel Framing	03/03/2023
05 3100	Steel Decking	03/03/2023
05 5133	Metal Ladders	03/03/2023
	DIVISION 6 – WOOD, PLASTICS, AND COMPOSITES	
06 1000	Rough Carpentry	03/03/2023
06 4100	Architectural Wood Casework	03/03/2023

06 8316	Fiberglass Reinforced Paneling	03/03/2023
	DIVISION 7 – THERMAL AND MOISTURE PROTECTION	
07 1113	Bituminous Dampproofing	03/03/2023
07 1900	Water Repellents	03/03/2023
07 2100	Thermal Insulation	03/03/2023
07 2119	Foamed-in-Place Insulation	03/03/2023
07 2500	Weather Barriers	03/03/2023
07 6200	Sheet Metal Flashing and Trim	03/03/2023
07 9200	Joint Sealants	03/03/2023
	DIVISION 8 – OPENINGS	
08 1113	Hollow Metal Doors and Frames	03/03/2023
08 1416	Flush Wood Doors	03/03/2023
08 3100	Access Doors and Panels	03/03/2023
08 3613	Sectional Doors	03/03/2023
08 4313	Aluminum-Framed Storefronts	03/03/2023
08 4500	Translucent Wall and Roof Assemblies	03/03/2023
08 7100	Door Hardware	03/03/2023
08 8000	Glazing	03/03/2023
08 8300	Mirrors	03/03/2023
	DIVISION 9 – FINISHES	
09 0561	Common Work Results for Flooring Preparation	03/03/2023
09 2116	Gypsum Board Assemblies	03/03/2023
09 2216	Non-Structural Metal Framing	03/03/2023
09 3000	Tiling	03/03/2023
09 5100	Acoustical Ceilings	03/03/2023
09 6500	Resilient Flooring	03/03/2023
09 6700	Fluid-Applied Flooring	03/03/2023
09 9123	Interior Painting	03/03/2023
09 9600	High-Performance Coatings	03/03/2023
	DIVISION 10 – SPECIALTIES	
10 1400	Signage	03/03/2023
10 2600	Wall and Door Protection	03/03/2023
10 2800	Toilet, Bath and Laundry Accessories	03/03/2023
10 4400	Fire Protection Specialties	03/03/2023
	DIVISION 11 – EQUIPMENT	
11 6623	Gymnasium Equipment	03/03/2023
	DIVISION 12 – FURNISHINGS	
12 2400	Window Shades	03/03/2023
12 3600	Countertops	03/03/2023
	DIVISION 13 – SPECIAL CONSTRUCTION	
13 3419	Metal Building Systems	03/03/2023
	DIVISION 14 – CONVEYING EQUIPMENT	
	DIVISION 21 – FIRE SUPPRESSION	
	DIVISION 22 – PLUMBING	
22 0500	Plumbing Materials and Methods	03/03/2023
22 0700	Plumbing Insulation	03/03/2023

22 1000	Plumbing Piping and Pumps	03/03/2023
22 3000	Plumbing Equipment	03/03/2023
22 4000	Plumbing Fixtures	03/03/2023
	DIVISION 23 – HEATING, VENTILATING AND AIR-CONDITIONING (HVAC)	
23 0500	HVAC Materials and Methods	03/03/2023
23 0548	Vibration and Seismic Controls for HVAC	03/03/2023
23 0590	Testing, Adjusting and Balancing for HVAC	03/03/2023
23 0700	HVAC Insulation	03/03/2023
23 0923	Direct-Digital Control System for HVAC	03/03/2023
23 0993	Sequence of Operations for HVAC Controls	03/03/2023
23 1000	Facility Fuel Systems	03/03/2023
23 2300	Refrigerant Piping System	03/03/2023
23 3000	Air Distribution	03/03/2023
23 4000	HVAC Air Cleaning Devices	03/03/2023
23 7450	Unitary HVAC Units	03/03/2023
23 8000	Terminal HVAC Equipment	03/03/2023
	DIVISION 25 – INTEGRATED AUTOMATION	
	DIVISION 26 – ELECTRICAL	
26 0000	General Electrical Requirements	03/03/2023
26 0108	Electrical Testing	03/03/2023
26 0110	Operation and Maintenance Data	03/03/2023
26 0502	Minor Electrical Demolition	03/03/2023
26 0519	Low-Voltage Electrical Power Conductors and Cables	03/03/2023
26 0526	Grounding and Bonding for Electrical Systems	03/03/2023
26 0529	Hangers and Supports for Electrical Systems	03/03/2023
26 0533	Raceways and Boxes for Electrical Systems	03/03/2023
26 0548	Seismic Restraints for Electrical Systems	03/03/2023
26 0553	Electrical and Control Identification	03/03/2023
26 0573	Overcurrent Protective Device Coordination Study	03/03/2023
26 0583	Wiring Connections	03/03/2023
26 0933	Wireless Lighting Control System	03/03/2023
26 2416	Panelboards	03/03/2023
26 2726	Wiring Devices	03/03/2023
26 2823	Enclosed Switches and Circuit Breakers	03/03/2023
26 5100	Interior Lighting	03/03/2023
26 5600	Exterior Lighting	03/03/2023
	DIVISION 27 - COMMUNICATIONS	
27 0000	General Communication System Requirements	03/03/2023
27 0526	Grounding and Bonding for Communication Systems	03/03/2023
27 0529	Hangers and Supports for Communication Systems	03/03/2023
27 0533	Conduits and Boxes for Communication Systems	03/03/2023
27 1100	Communication Equipment Room Fittings	03/03/2023
27 1323	Communication Optical Fiber Backbone Cabling	03/03/2023
27 1500	Communication Horizontal Cabling	03/03/2023
27 3133	Wireless Access Points	03/03/2023

	DIVISION 28 – ELECTRONIC SAFETY AND SECURITY	
28 0000	General Electronic Safety and Security Requirements	03/03/2023
28 0529	Hangers and Supports for Safety and Security Systems	03/03/2023
28 0533	Conduits and Boxes for Safety and Security Systems	03/03/2023
28 1300	Access Control	03/03/2023
28 3000	Fire Detection and Alarm	03/03/2023
	DIVISION 31 - EARTHWORK	
31 1000	Site Clearing	03/03/2023
31 2200	Grading	03/03/2023
31 2316	Excavation	03/03/2023
31 2316.13	Trenching	03/03/2023
31 2323	Fill	03/03/2023
	DIVISION 32 – EXTERIOR IMPROVEMENTS	
32 1123	Aggregate Base Courses	03/03/2023
32 1216	Asphalt Paving	03/03/2023
32 1313	Concrete Paving	03/03/2023
32 1723.13	Painted Pavement Markings	03/03/2023
32 8423	Underground Sprinklers	03/03/2023
32 9219	Seeding	03/03/2023
	DIVISION 33 – UTILITIES	
33 0513	Manholes and Structures	03/03/2023
33 1300	Disinfecting of Water Utility Distribution	03/03/2023
33 1416	Site Water Utility Distribution Piping	03/03/2023
33 3113	Site Sanitary Sewerage Gravity Piping	03/03/2023
33 4211	Stormwater Gravity Piping	03/03/2023

3. ADDENDA

ADDENDA #	SHEET / SPEC	TITLE	DATE
1		Summary	04/21/23
	A0.11	Interior Assemblies	
	A0.12	Exterior Assemblies	
	A2.01	Overall Floor Plan & Roof Plan	
	A3.21	Exterior Wall Sections	
	A6.01	Overall Reflected Ceiling Plan	
	A8.01	Door Schedule and Frame Types	
	A8.11	Exterior Details	
	A9.03	Interior Details – General	
	S4.01	Walkway Framing Plans & Details	
	C100	Cover Sheet	
	C104	Overall Site Plan	
	C200	Overall Grading Plan	
	C300	Overall Drainage Plan	
	C400	Public Water Utility Plan	
	C401	Private Utility Plan	
	M2.00	Mechanical Floor, Mezzanine and Roof Plans	

	M4.00	Mechanical Sections	
	M5.00	Mechanical Controls	
	M6.00	Mechanical Legend & Schedules	
	M6.01	Mechanical Details	
	P2.00	Plumbing Under Slab and Floor Plans	
	P6.00	Plumbing Legend, Schedules and Details	
	E2.01	Lighting Floor Plans	
	E4.01	Low Voltage Plan	
	E5.01	Fire Alarm and Security Plans	
	E6.01	Panel Schedules	
	26 0553	Electrical and Control Identification	
	27 1323	Communication Optical Fiber Backbone Cabling	
	27 1500	Communication Horizontal Cabling	



Lebanon Community Schools – Seven Oak Middle School
AMENDMENT 02 – GMP

5/2/2023
Updated 5/9/2023

EXHIBIT B – Amendment 02 Summary

Original Contract – Preconstruction Services	\$ 27,500.00
Amendment 01 – Concrete and Site Work	\$ 647,204.90
<hr/>	
Subtotal (Total Current Contract)	\$ 674,704.90
Amendment 02 – GMP	\$ 3,089,762.07
Accepted Alternates 1 & 3:	\$ 209,455.77
Accepted VE:	\$ 0.00
<hr/>	
Total New Contract (With Amendment 02)	\$ 3,973,922.74

Please reference following GC Estimate Detail sheets for clarification.

Contract Reconciliation Sheet

Job Name: Lebanon Community Schools-Seven Oak Middle School
GBC Job No. 230009

Date: 5/2/2023
Updated 5/8/2023

Designer Ref. Soderstrom 100% CDs dated 3/3/23



	WORK DESCRIPTION	SUBCONTRACTOR/ VENDOR
	General Conditions & Site Requirements	
	General Conditions	GBC
	Site Requirements	GBC
	GC & SRs SUBTOTAL	
	General Conditions - ALTERNATES 1 & 3	GBC
	GC & SRs SUBTOTAL - ALT 1&3	
	Amendment 01 - Site Work and Concrete	
	Structural Concrete	Petrichor Constructors
	Site Concrete	Petrichor Constructors
	Site Work	Superior Excavation
	Amendment 02 - GMP	
	Dampproofing/Drainage Mat	TBD
	Masonry Veneer	Haps Masonry
	Rough Carpentry	GBC / Mid-Valley
	Casework	Advance Cabinet Design
	Insulation	TBD - Allowance
	Sheet Metal	Santiam Heating & SM
	Doors, Frames, Hardware	GBC / Bell Hardware
	Overhead Doors	OH Door of Springfield
	Glazing	TBD - Culver or Smith
	Walls & Ceilings	Mid-Valley
	Tiling	Paragon
	Flooring	Rubenstein's
	Painting	Mid-Valley
	Misc. Accessories, Toilet Accessories, OFCI Accessories	GBC/BMS/Fast Signs
	FRP & Corner Guards	GBC
	Gymnasium Equipment	H2I
	Window Coverings	Valley Shades
	PEMB Supply	ABS
	PEMB Erection	GRS
	Plumbing	II-S Mechanical
	Mechanical	Santiam Heating & SM
	Electrical, Low Voltage, Security, Access Controls, Fire Alarm	Rite Way
	Landscaping	TBD - Glenco or Upwards
	Survey, Building Tie-In, Bollards, Housekeeping pads - DISTRIBUTE	MISC
	Repave fire access	TBD
	Addendum 1 Fire line & Gas & Asphalt Patch	Superior Excavation
	Subcontractor Work SUBTOTAL	
	Amendment 02 - GMP - ALT 1&3	
	Canopy Footings - ALT1	Petrichor Constructors
	Canopy Footings Excavation - ALT1	Superior Excavation
	Canopy Structural Steel - ALT1	Rock Hill
	Sheet Metal - ALT1	Santiam Heating & SM
	Painting - ALT1	Mid-Valley
	Plumbing - ALT1	II-S Mechanical
	Electrical/Lights - ALT1	Rite Way
	Spray Foam Insulation at Walls - ALT3	TBD - Allowance
	Subcontractor Work SUBTOTAL - ALT 1&3	

[illegible][illegible]

CURRENT	
Seven Oak MS	
Amendment 02	
GMP	
\$	482,490.00
\$	482,490.00
\$	11,447.00
\$	11,447.00
\$	8,000.00
\$	52,483.00
\$	75,357.00
\$	38,070.00
\$	92,799.00
\$	27,016.00
\$	59,151.00
\$	13,928.00
\$	103,006.00
\$	158,900.00
\$	17,278.00
\$	74,658.00
\$	28,100.00
\$	27,062.00
\$	5,159.00
\$	10,595.00
\$	6,100.00
\$	246,559.00
\$	213,359.00
\$	116,017.00
\$	299,000.00
\$	425,890.00
\$	45,636.00
\$	29,720.00
\$	17,000.00
\$	40,140.00
\$	2,230,983.00
\$	26,400.00
\$	2,285.00
\$	74,521.00
\$	30,780.00
\$	13,200.00
\$	6,420.00
\$	5,600.00
\$	15,621.00
\$	174,827.00

Total Current Contract (Original Contract + Amendment 01)	
\$	490,580.00
\$	490,580.00
\$	11,447.00
\$	11,447.00
\$	192,213.00
\$	38,350.00
\$	365,420.16
\$	8,000.00
\$	52,483.00
\$	75,357.00
\$	38,070.00
\$	92,799.00
\$	27,016.00
\$	59,151.00
\$	13,928.00
\$	103,006.00
\$	158,900.00
\$	17,278.00
\$	74,658.00
\$	28,100.00
\$	27,062.00
\$	5,159.00
\$	10,595.00
\$	6,100.00
\$	246,559.00
\$	213,359.00
\$	116,017.00
\$	299,000.00
\$	425,890.00
\$	45,636.00
\$	29,720.00
\$	17,000.00
\$	40,140.00
\$	2,826,966.16
\$	26,400.00
\$	2,285.00
\$	74,521.00
\$	30,780.00
\$	13,200.00
\$	6,420.00
\$	5,600.00
\$	15,621.00
\$	174,827.00

	WORK DESCRIPTION	SUBCONTRACTOR/ VENDOR
	Preconstruction Services	T&M NTE/Cost Reimb.
	Contingency - Includes AM1 Totals as well	5.00%
	Contingency - ALT 1 & 3	5.00%
	Insurance (GL & WC)	0.93%
	Insurance (GL & WC) - ALT 1 & 3	0.93%
	Builders Risk - Updated 5/9/23 to be carried by GBC	-
	Contractor Fee	5.30%
	Contractor Fee - ALT 1 & 3	5.30%
	Bonding	0.81%
	Bonding - ALT 1 & 3	0.81%
	Direct Job Cost SUBTOTAL	
	TOTALS	

Original Contract
Preconstruction Services
\$ 27,500.00
\$ -
\$ -
\$ -
\$ -
\$ -
\$ -
\$ -
\$ -
\$ -
\$ -
\$ 27,500.00
\$ 27,500.00

Amendment 01
Slite Work and Concrete
\$ -
\$ -
\$ -
\$ 5,617.88
\$ -
\$ -
\$ -
\$ 32,313.63
\$ -
\$ 5,200.24
\$ -
\$ 43,131.74
\$ 647,204.90

Amendment 02
GMP
\$ -
\$ 165,877.31
\$ 9,313.70
\$ 26,777.96
\$ 1,818.97
\$ 6,500.00
\$ 152,307.82
\$ 10,366.15
\$ 24,825.98
\$ 1,682.96
\$ 399,470.84
\$ 3,299,217.84

Total Current Contract (Original Contract + Amendement 01)
\$ 27,500.00
\$ 165,877.31
\$ 9,313.70
\$ 32,395.84
\$ 1,818.97
\$ 6,500.00
\$ 184,621.44
\$ 10,366.15
\$ 30,026.22
\$ 1,682.96
\$ 470,102.58
\$ 3,973,922.74

**Cost of Work/General Conditions/Fee Matrix****Lebanon Community Schools - Seven Oak Middle School****Total Project GCs**

Based on GCs for Amendment 02 - GMP

5/2/2023 - Updated 5/9/2023

		Construction costs/Paid by Owner				Total GCs & SRs Amendment 01				Total GCs & SRs Amendment 02				
	Description	Direct Cost of the Work	General Conditions/ Requirements Work Cost	CMGC OH Part of GMGC FEE	Owner (LCS) Cost	Quantity	Unit	Unit Cost	Total	Quantity	Unit	Unit Cost	Total	
Costs Related to COW - General Conditions Staffing & Job Office														
	1 Senior Project Manager (for project specific time only)		X			2	HR	\$ 112.00	\$ 224.00	78	HR	\$ 112.00	\$ 8,736.00	\$ 8,960.00
1Alt3	Senior Project Manager (for project specific time only) - ALT3		X					\$ -	\$ -	2	HR	\$ 112.00	\$ 224.00	\$ 224.00
	2 Project Manager		X			28	HR	\$ 102.00	\$ 2,856.00	1092	HR	\$ 102.00	\$ 111,384.00	\$ 114,240.00
2Alt3	Project Manager - ALT3		X					\$ -	\$ -	28	HR	\$ 102.00	\$ 2,856.00	\$ 2,856.00
	3 Project Superintendent		X			20	HR	\$ 105.00	\$ 2,100.00	1580	HR	\$ 105.00	\$ 165,900.00	\$ 168,000.00
3Alt3	Project Superintendent - ALT3		X					\$ -	\$ -	40	HR	\$ 105.00	\$ 4,200.00	\$ 4,200.00
	4 Assistant Project Manager		X					\$ -	\$ -			\$ -	\$ -	\$ -
	5 Project Engineers		X			30	HR	\$ 75.00	\$ 2,250.00	1170	HR	\$ 75.00	\$ 87,750.00	\$ 90,000.00
5Alt3	Project Engineers - ALT3		X					\$ -	\$ -	30	HR	\$ 75.00	\$ 2,250.00	\$ 2,250.00
	6 Field Engineers		X					\$ -	\$ -			\$ -	\$ -	\$ -
	7 On-Site Clerical Assistant - Project Coordinator		X			12	HR	\$ 55.00	\$ 660.00	468	HR	\$ 55.00	\$ 25,740.00	\$ 26,400.00
7Alt3	On-Site Clerical Assistant - Project Coordinator - ALT3		X					\$ -	\$ -	12	HR	\$ 55.00	\$ 660.00	\$ 660.00
	8 Scheduler (for project specific time only)		X					\$ -	\$ -			\$ -	\$ -	\$ -
	9 Safety Coordinator (for project specific time only)		X					\$ -	\$ -			\$ -	\$ -	\$ -
	10 Employee fringe benefits, vacation and sick leave		X					\$ -	\$ -			\$ -	\$ -	\$ -
	11 Travel, lodging, per diem, ect.		X					\$ -	\$ -			\$ -	\$ -	\$ -
	12 Jobsite Office and storage trailer rental		X					\$ -	\$ -	9	mos	\$ 720.00	\$ 6,480.00	\$ 6,480.00
12Alt3	Jobsite Office and storage trailer rental - ALT3		X					\$ -	\$ -	0.25	mos	\$ 720.00	\$ 180.00	\$ 180.00
	12.1 Jobsite Storage Trailer rental		X					\$ -	\$ -	5	mos	\$ 250.00	\$ 1,250.00	\$ 1,250.00
12.1Alt3	Jobsite Storage Trailer rental - ALT3		X					\$ -	\$ -	0.25	mos	\$ 250.00	\$ 63.00	\$ 63.00
	12.2 Jobsite Equipment Rental		X					\$ -	\$ -	9	mos	\$ 750.00	\$ 6,750.00	\$ 6,750.00
12.2Alt3	Jobsite Equipment Rental - ALT3		X					\$ -	\$ -	0.25	mos	\$ 750.00	\$ 188.00	\$ 188.00
	13 Job Office Furniture, equipment, and expendables		X					\$ -	\$ -	1	ls	\$ 1,400.00	\$ 1,400.00	\$ 1,400.00
13Alt3	Job Office Furniture, equipment, and expendables - ALT3		X					\$ -	\$ -	0.25	ls	\$ 100.00	\$ 25.00	\$ 25.00
	14 Job office security and cleaning		X					\$ -	\$ -	1	ls	\$ 850.00	\$ 850.00	\$ 850.00
	15 Vehicle costs for onsite CM/GC vehicles		X					\$ -	\$ -	9	mos	\$ 1,100.00	\$ 9,900.00	\$ 9,900.00
15Alt3	Vehicle costs for onsite CM/GC vehicles - ALT3		X					\$ -	\$ -	0.25	mos	\$ 1,100.00	\$ 275.00	\$ 275.00
	15.1 Vehicle costs for onsite CM/GC vehicles - Fuel		X					\$ -	\$ -	9	mos	\$ 850.00	\$ 7,650.00	\$ 7,650.00
15.1Alt3	Vehicle costs for onsite CM/GC vehicles - Fuel - ALT3		X					\$ -	\$ -	0.25	mos	\$ 850.00	\$ 213.00	\$ 213.00
	16 Postage and Shipping		X					\$ -	\$ -	9	mos	\$ 100.00	\$ 900.00	\$ 900.00
	17 Project Photos		X					\$ -	\$ -	9	mos	\$ 100.00	\$ 900.00	\$ 900.00
	18 Computers		X					\$ -	\$ -	9	mos	\$ 300.00	\$ 2,700.00	\$ 2,700.00
18Alt3	Computers - ALT3		X					\$ -	\$ -	0.25	mos	\$ 300.00	\$ 75.00	\$ 75.00
	18.1 Printer/Fax		X					\$ -	\$ -	9	mos	\$ 100.00	\$ 900.00	\$ 900.00
18.1Alt3	Printer/Fax - ALT3		X					\$ -	\$ -	0.25	mos	\$ 100.00	\$ 25.00	\$ 25.00
	19 Document Printing		X					\$ -	\$ -	1	ls	\$ 1,800.00	\$ 1,800.00	\$ 1,800.00
	20 Commissioning Coordination		X					\$ -	\$ -				\$ -	\$ -
	21 Cost estimating (Post GMP)		X					\$ -	\$ -				\$ -	\$ -
	22 Value engineering (Post GMP)		X					\$ -	\$ -				\$ -	\$ -
	23 Temporary Toilets		X					\$ -	\$ -	9	mos	\$ 300.00	\$ 2,700.00	\$ 2,700.00
23Alt3	Temporary Toilets - ALT3		X					\$ -	\$ -	0.25	mos	\$ 300.00	\$ 75.00	\$ 75.00
	24 Drinking water (NOT coffee)		X					\$ -	\$ -	9	mos	\$ 150.00	\$ 1,350.00	\$ 1,350.00
24Alt3	Drinking water (NOT coffee) - ALT3		X					\$ -	\$ -	0.25	mos	\$ 150.00	\$ 38.00	\$ 38.00
	25 Contractor Signage		X					\$ -	\$ -	1	ls	\$ 500.00	\$ 500.00	\$ 500.00
	26 Safety equipment for CM/GC personnel		X					\$ -	\$ -	1	ls	\$ 1,200.00	\$ 1,200.00	\$ 1,200.00
	27 First aid supplies & Fire Extinguishers		X					\$ -	\$ -	1	ls	\$ 500.00	\$ 500.00	\$ 500.00
	28 Substance abuse testing/monitoring		X					\$ -	\$ -				\$ -	\$ -
	29 CM/GC mobilization		X					\$ -	\$ -	1	ls	\$ 3,000.00	\$ 3,000.00	\$ 3,000.00
29.1	CM/GC demobilization		X					\$ -	\$ -	1	ls	\$ 3,000.00	\$ 3,000.00	\$ 3,000.00
	30 Jobsite Security		X					\$ -	\$ -	1000	lf	\$ 6.15	\$ 6,150.00	\$ 6,150.00
30.1	Jobsite Security Logistics		X					\$ -	\$ -	1	ls	\$ 16,000.00	\$ 16,000.00	\$ 16,000.00
	31 CM/GC parking/shuttle		X					\$ -	\$ -				\$ -	\$ -
	32 Phone & internet installation & line charges		X					\$ -	\$ -				\$ -	\$ -
	33 Telephones, cell phones, radios, pagers		X					\$ -	\$ -	9	mos	\$ 200.00	\$ 1,800.00	\$ 1,800.00
33Alt3	Telephones, cell phones, radios, pagers - ALT3		X					\$ -	\$ -	0.25	mos	\$ 200.00	\$ 50.00	\$ 50.00
	33.1 Internet		X					\$ -	\$ -	9	mos	\$ 200.00	\$ 1,800.00	\$ 1,800.00
33.1Alt3	Internet - ALT3		X					\$ -	\$ -	0.25	mos	\$ 200.00	\$ 50.00	\$ 50.00
	34 Small tools for CM/GC usage		X					\$ -	\$ -	1	ls	\$ 3,500.00	\$ 3,500.00	\$ 3,500.00

Project:	Seven Oak Middle School Classroom Addition	Estimate No.:	3.0	<div>GBC</div> <div>CONSTRUCTION</div>
Location:	550 Cascade Drive; Lebanon, OR	Date:	5/2/2023	
Owner:	Lebanon Community Schools	Updated:	5/9/2023	
Architect:	Soderstrom	Estimator:	Timmins / Devine	
Drawing Set:	GMP Based on Soderstrom 100% CD			

GBC						
	Budget 2.1 021723 DD	Budget 2.1 021723 DD ALTERNATE - Covered Walk	Budget 3.0 GMP	Budget 3.0 GMP Alternate 1 Covered Walk	Budget 3.0 GMP Alternate 2 Roof Assembly	Budget 3.0 GMP Alternate 3 Ext. Wall Assembly
Facility Construction & Services						
STANDARD FOUNDATIONS	\$172,773	\$28,883	\$206,235	\$28,685	\$0	\$0
SLAB ON GRADE	\$101,790	\$0	\$118,313	\$0	\$0	\$0
FLOOR & COLUMN CONSTRUCTION	\$67,918	\$0	\$57,549	\$0	\$0	\$0
ROOF & COLUMN CONSTRUCTION	\$0	\$49,440	\$0	\$74,521	\$0	\$0
EXTERIOR WALLS	\$156,465	\$0	\$145,282	\$0	\$28,503	\$15,621
EXTERIOR WINDOWS	\$51,320	\$0	\$103,006	\$0	\$0	\$0
EXTERIOR DOORS	\$62,920	\$0	\$13,928	\$0	\$0	\$0
ROOF COVERINGS	\$20,886	\$16,080	\$27,016	\$30,780	\$0	\$0
EXTERIOR CEILING FINISHES	\$0	\$17,280	\$0	\$13,200	\$0	\$0
INTERIOR PARTITIONS	\$210,557	\$0	\$211,808	\$0	\$0	\$0
INTERIOR WINDOWS	\$5,500	\$0	\$0	\$0	\$0	\$0
INTERIOR DOORS	\$43,335	\$0	\$59,151	\$0	\$0	\$0
FITTINGS AND SPECIALTIES	\$37,715	\$0	\$27,062	\$0	\$0	\$0
WALL FINISHES	\$38,037	\$0	\$22,437	\$0	\$0	\$0
FLOORING	\$76,958	\$0	\$74,658	\$0	\$0	\$0
CEILING FINISHES	\$41,664	\$0	\$2,800	\$0	\$0	\$0
PLUMBING FIXTURES	\$50,600	\$0	\$2,000	\$0	\$0	\$0
PLUMBING PIPING, ACCESSORIES, GCS	\$53,700	\$0	\$116,017	\$6,420	\$0	\$0
HVAC DISTRIBUTION SYSTEM	\$213,900	\$0	\$299,000	\$0	\$0	\$0
FIRE PROTECTION	\$0	\$0	\$0	\$0	\$0	\$0
ELECTRICAL & LOW VOLTAGE	\$379,805	\$6,600	\$425,890	\$5,600	\$0	\$0
OTHER EQUIPMENT	\$17,160	\$0	\$10,595	\$0	\$0	\$0
FIXED FURNISHINGS	\$16,050	\$0	\$44,170	\$0	\$0	\$0
SPECIAL STRUCTURES	\$377,460	\$0	\$459,918	\$0	\$0	\$0
BUILDING MISCELLANEOUS	\$0	\$0	\$0	\$0	\$0	\$0
Facility Construction & Services Subtotal	\$ 2,196,513	\$ 118,283	\$ 2,426,835	\$ 159,205.56	\$ 28,503.00	\$ 15,621.00

Site & Infrastructure						
SITE EARTHWORK	\$52,705	\$0	\$48,759	\$0	\$0	\$0
PAVING & CURBS	\$10,000	\$0	\$19,211	\$0	\$0	\$0
LANDSCAPING	\$42,000	\$0	\$45,636	\$0	\$0	\$0
SITE UTILITIES	\$260,855	\$6,000	\$286,526	\$0	\$0	\$0
SITE ELECTRICAL	\$10,000	\$0	\$0	\$0	\$0	\$0
Site and Infrastructure Subtotal	\$ 375,560	\$ 6,000	\$ 400,132	\$ -	\$ -	\$ -
BASE HARDCOST TOTAL	\$ 2,572,073	\$ 124,283	\$ 2,826,966	\$ 159,206	\$ 28,503	\$ 15,621

General Conditions						
Preconstruction	\$27,500	\$0	\$27,500	\$0	\$0	\$0
General Conditions	\$485,350	\$0	\$490,580	\$0	\$5,095	\$11,447
Site and Infrastructure Subtotal	\$ 512,850	\$ -	\$ 518,080	\$ -	\$ 5,095	\$ 11,447

Markups						
Markups (Based on Hardcosts)						
Construction Contingency 5.00%	\$229,307	\$9,321	\$165,877	\$7,960	\$1,680	\$1,353
Escalation	\$0	\$0	\$0	\$0	\$0	\$0
Markups (Based on Total Cost)						
Insurance (GL & WC) 0.93%	\$30,822	\$1,243	\$32,396	\$1,555	\$328	\$264
Builders Risk Insurance - BY GBC	\$0	\$0	\$6,500	\$0	\$0	\$0
Profit & Overhead (Fee) 5.30%	\$177,288	\$7,147	\$184,621	\$8,860	\$1,887	\$1,506
Bonding 0.81%	\$28,531	\$1,150	\$30,026	\$1,438	\$304	\$245
OR Gross Receipts Tax (CAT Tax) - INCLUDED IN FEE	\$0	\$0	\$0	\$0	\$0	\$0
Markups Total	\$ 465,948	\$ 18,861	\$ 419,421	\$ 19,813	\$ 4,199	\$ 3,369

Total	\$ 3,550,871	\$ 3,764,467
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Alternates		
1 North & East Walkway Canopys - INCLUDED IN GMP	\$ 143,144	\$ 179,019
2 Roof Assembly - NOT TAKEN AT TIME OF GMP		\$ 37,797
3 Wall Assembly (Spray Foam) - INCLUDED IN GMP		\$ 30,437

Total GMP WITH ALTS 1 & 3	\$ 3,973,923
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- Owner Costs (Excluded from GBC Estimate)
- SDC & Permitting Fees
 - Public Improvements
 - Hazardous Material Removal/Disposal
 - Contaminated Soil removal/Disposal
 - Power company Charges

Project:	Seven Oak Middle School Classroom Addition	Estimate No.:	0.0
Location:	550 Cascade Drive; Lebanon, OR	Date:	0-Jan-00
Owner:	Lebanon Community Schools	Estimator:	0.0
Architect	Soderstrom		

Description	Quantity	UMH	MH	Labor Rate	Labor \$	Matl UP	Matl \$	Total \$
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JOBSITE MANAGEMENT

Sr. Project Manager	40 wks	2.00	80	\$112.00	\$8,960		\$0	
Project Manager	40 wks	28.00	1,120	\$102.00	\$114,240		\$0	
Project Superintendent	40 wks	40.00	1,600	\$105.00	\$168,000		\$0	
Project Engineer	40 wks	30.00	1,200	\$75.00	\$90,000		\$0	
Project Coordinator	40 wks	12.00	480	\$55.00	\$26,400		\$0	
					\$407,600		\$0	\$407,600
Unit Cost	9 mos							\$45,289

Jobsite Office

Temporary Logistics	1 allow		0	\$0	\$16,000.00	\$16,000	
Office Trailer (10x40)	9 mos		0	\$0	\$720.00	\$6,480	
Conference Trailer (10x30)	mos		0	\$0			
Tool Trailer &/or Connex	5 mos		0	\$0	\$250.00	\$1,250	
Small Tools	1 ls		0	\$0	\$3,500.00	\$3,500	
Jobsite Set-up/Mobilization	1 ls		0	\$0	\$3,000.00	\$3,000	
Demobilization	1 ls		0	\$0	\$3,000.00	\$3,000	
Jobsite Furniture	1 ls		0	\$0	\$500.00	\$500	
Copy Machine	mos		0	\$0			
Computers	9 mos		0	\$0	\$300.00	\$2,700	
Internet Connection	9 mos		0	\$0	\$200.00	\$1,800	
Printer/Fax	9 mos		0	\$0	\$100.00	\$900	
Fax Machine	mos		0	\$0			
Telephone Set-up (New Service)	ls		0	\$0			
Telephone Set-up (Ext. Service)	ls		0	\$0			
Telephone Monthly Cost	mos		0	\$0			
Cell Phone Bills	9 mos		0	\$0	\$200.00	\$1,800	
Temporary Toilet	9 mos		0	\$0	\$300.00	\$2,700	
Temporary Security Fencing	1,000 lf		0	\$0	\$6.15	\$6,150	
Project Sign	1 ls		0	\$0	\$500.00	\$500	

Vehicles/Travel

Automobile Allowance	9 mos		0	\$0	\$1,100.00	\$9,900	
Truck Rental, Small (Flat Bed)	mos		0	\$0			
Truck Rental, Large	mos		0	\$0			
Travel Expenses/Tolls	mos		0	\$0			
Equipment rental	9 mos		0	\$0	\$750.00	\$6,750	
Subsistence	mos		0	\$0			
Temp Protection	Allow		0	\$0			
Parking	mos		0	\$0			
Fuel-Trucks/Cars	9 mos		0	\$0	\$850.00	\$7,650	

Jobsite Office Equipment/Services

Postage/Shipping	9 mos		0	\$0	\$100.00	\$900	
Petty Cash	mos		0	\$0			
Jobsite Safety	1 ls		0	\$0	\$1,200.00	\$1,200	
First Aid & Fire Extinguishers	1 ls		0	\$0	\$500.00	\$500	
Office Supplies	9 mos		0	\$0	\$100.00	\$900	
Copier Paper	mos		0	\$0			
Drinking Water	9 mos		0	\$0	\$150.00	\$1,350	
Progress Photographs	9 mos		0	\$0	\$100.00	\$900	
Janitorial Service	mos		0	\$0			
Job office security	1 ls		0	\$0	\$850.00	\$850	
Blueprinting	1 LS		0	\$0	\$1,800.00	\$1,800	
Scheduling	mos		0	\$0			
Jobsite Office Water	mos		0	\$0			

				\$0		\$82,980	\$82,980
Unit Cost	9 mos						\$9,220

				\$407,600		\$82,980	\$490,580
							\$54,509

ALTERNATE 2 - ROOF ASSEMBLY**NOT INCLUDED IN GMP**

Project: **Seven Oak Middle School Classroom Addition**
Location: 550 Cascade Drive; Lebanon, OR
Owner: Lebanon Community Schools
Architect: Soderstrom

Estimate No.: 0.0
Date: 0-Jan-00
Estimator: 0.0

Description	Quantity	UMH	MH	Labor Rate	Labor \$	Matl UP	Matl \$	Total \$
JOBSITE MANAGEMENT								
Sr. Project Manager	0.50 wks	2.00	1	\$112.00	\$112		\$0	
Project Manager	0.50 wks	28.00	14	\$102.00	\$1,428		\$0	
Project Superintendent	0.50 wks	40.00	20	\$105.00	\$2,100		\$0	
Project Engineer	0.50 wks	30.00	15	\$75.00	\$1,125		\$0	
Project Coordinator	0.50 wks	12.00	6	\$55.00	\$330		\$0	
					\$5,095		\$0	\$5,095
Unit Cost	9 mos							\$566
Jobsite Office								
Temporary Logistics	allow		0		\$0	\$17,000.00	\$0	
Office Trailer (10x40)	mos		0		\$0	\$720.00	\$0	
Conference Trailer (10x30)	mos		0		\$0			
Tool Trailer &/or Connex	mos		0		\$0	\$250.00	\$0	
Small Tools	ls		0		\$0	\$3,500.00	\$0	
Jobsite Set-up/Mobilization	ls		0		\$0	\$3,000.00	\$0	
Demobilization	ls		0		\$0	\$3,000.00	\$0	
Jobsite Furniture	ls		0		\$0	\$500.00	\$0	
Copy Machine	mos		0		\$0			
Computers	mos		0		\$0	\$300.00	\$0	
Internet Connection	mos		0		\$0	\$200.00	\$0	
Printer/Fax	mos		0		\$0	\$100.00	\$0	
Fax Machine	mos		0		\$0			
Telephone Set-up (New Service)	ls		0		\$0			
Telephone Set-up (Ext. Service)	ls		0		\$0			
Telephone Monthly Cost	mos		0		\$0			
Cell Phone Bills	mos		0		\$0	\$200.00	\$0	
Temporary Toilet	mos		0		\$0	\$300.00	\$0	
Temporary Security Fencing	lf		0		\$0	\$6.15	\$0	
Project Sign	ls		0		\$0	\$500.00	\$0	
Vehicles/Travel								
Automobile Allowance	mos		0		\$0	\$1,100.00	\$0	
Truck Rental, Small (Flat Bed)	mos		0		\$0			
Truck Rental, Large	mos		0		\$0			
Travel Expenses/Tolls	mos		0		\$0			
Equipment rental	mos		0		\$0	\$750.00	\$0	
Subsistence	mos		0		\$0			
Temp Protection	Allow		0		\$0			
Parking	mos		0		\$0			
Fuel-Trucks/Cars	mos		0		\$0	\$850.00	\$0	
Jobsite Office Equipment/Services								
Postage/Shipping	mos		0		\$0	\$100.00	\$0	
Petty Cash	mos		0		\$0			
Jobsite Safety	ls		0		\$0	\$1,200.00	\$0	
First Aid & Fire Extinguishers	ls		0		\$0	\$500.00	\$0	
Office Supplies	mos		0		\$0	\$100.00	\$0	
Copier Paper	mos		0		\$0			
Drinking Water	mos		0		\$0	\$150.00	\$0	
Progress Photographs	mos		0		\$0	\$100.00	\$0	
Janitorial Service	mos		0		\$0			
Job office security	ls		0		\$0	\$850.00	\$0	
Blueprinting	LS		0		\$0	\$1,800.00	\$0	
Scheduling	mos		0		\$0			
Jobsite Office Power	mos		0		\$0			
Jobsite Office Water	mos		0		\$0			
					\$0		\$0	\$0
Unit Cost	9 mos							\$0
					\$5,095		\$0	\$5,095
								\$566

ALTERNATE 3- WALL ASSEMBLY

INCLUDED IN GMP

Project:	Seven Oak Middle School Classroom Addition	Estimate No.:	0.0
Location:	550 Cascade Drive; Lebanon, OR	Date:	0-Jan-00
Owner:	Lebanon Community Schools	Estimator:	0.0
Architect	Soderstrom		

Description	Quantity	UMH	MH	Labor Rate	Labor \$	Matl UP	Matl \$	Total \$
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JOBSITE MANAGEMENT

Sr. Project Manager	1 wks	2.00	2	\$112.00	\$224		\$0	
Project Manager	1 wks	28.00	28	\$102.00	\$2,856		\$0	
Project Superintendent	1 wks	40.00	40	\$105.00	\$4,200		\$0	
Project Engineer	1 wks	30.00	30	\$75.00	\$2,250		\$0	
Project Coordinator	1 wks	12.00	12	\$55.00	\$660		\$0	
					\$10,190		\$0	\$10,190
Unit Cost	9 mos							\$1,132

Jobsite Office

Temporary Logistics	allow		0	\$0	\$17,000.00	\$0	
Office Trailer (10x40)	0.25 mos		0	\$0	\$720.00	\$180	
Conference Trailer (10x30)	mos		0	\$0			
Tool Trailer &/or Connex	0.25 mos		0	\$0	\$250.00	\$63	
Small Tools	ls		0	\$0	\$3,500.00	\$0	
Jobsite Set-up/Mobilization	ls		0	\$0	\$3,000.00	\$0	
Demobilization	ls		0	\$0	\$3,000.00	\$0	
Jobsite Furniture	ls		0	\$0	\$500.00	\$0	
Copy Machine	mos		0	\$0			
Computers	0.25 mos		0	\$0	\$300.00	\$75	
Internet Connection	0.25 mos		0	\$0	\$200.00	\$50	
Printer/Fax	0.25 mos		0	\$0	\$100.00	\$25	
Fax Machine	mos		0	\$0			
Telephone Set-up (New Service)	ls		0	\$0			
Telephone Set-up (Ext. Service)	ls		0	\$0			
Telephone Monthly Cost	mos		0	\$0			
Cell Phone Bills	0.25 mos		0	\$0	\$200.00	\$50	
Temporary Toilet	0.25 mos		0	\$0	\$300.00	\$75	
Temporary Security Fencing	lf		0	\$0	\$6.15	\$0	
Project Sign	ls		0	\$0	\$500.00	\$0	

Vehicles/Travel

Automobile Allowance	0.25 mos		0	\$0	\$1,100.00	\$275	
Truck Rental, Small (Flat Bed)	mos		0	\$0			
Truck Rental, Large	mos		0	\$0			
Travel Expenses/Tolls	mos		0	\$0			
Equipment rental	0.25 mos		0	\$0	\$750.00	\$188	
Subsistence	mos		0	\$0			
Temp Protection	Allow		0	\$0			
Parking	mos		0	\$0			
Fuel-Trucks/Cars	0.25 mos		0	\$0	\$850.00	\$213	

Jobsite Office Equipment/Services

Postage/Shipping	mos		0	\$0	\$100.00	\$0	
Petty Cash	mos		0	\$0			
Jobsite Safety	ls		0	\$0	\$1,200.00	\$0	
First Aid & Fire Extinguishers	ls		0	\$0	\$500.00	\$0	
Office Supplies	0.25 mos		0	\$0	\$100.00	\$25	
Copier Paper	mos		0	\$0			
Drinking Water	0.25 mos		0	\$0	\$150.00	\$38	
Progress Photographs	mos		0	\$0	\$100.00	\$0	
Janitorial Service	mos		0	\$0			
Job office security	ls		0	\$0	\$850.00	\$0	
Blueprinting	LS		0	\$0	\$1,800.00	\$0	
Scheduling	mos		0	\$0			
Jobsite Office Power	mos		0	\$0			
Jobsite Office Water	mos		0	\$0			

					\$0	\$1,257	\$1,257
Unit Cost	9 mos						\$140

					\$10,190	\$1,257	\$11,447
							\$1,272

DETAIL BREAKOUT

Project: **Seven Oak Middle School Classroom Addition**
 Location: 550 Cascade Drive; Lebanon, OR
 Owner: Lebanon Community Schools
 Architect: Soderstrom

Architect	Soderstrom				Budget 2.1 - 100% DD				Budget 3.0 - GMP						
Description					Quantity	Unit Price	Price	ALT. Price	Quantity	Unit Price	Price	ALT.1 Price Canopy	ALT.2 Price Roof	ALT.3 Price Wall	Comments
Building Areas															
Facility Construction & Services															
STANDARD FOUNDATIONS															
Site Work Bid									1 bid	\$87,984.94	\$87,985				Superior Excavation
Pad Excavation					477	CY	\$50.00	\$23,858	1 bid	incl					
Footings & Pad Excavation					50	CY	\$80.00	\$4,000	1 bid	incl					
Backfill									1 bid	incl					
Grading at Building Pad					9,000	SF	\$5.00	\$45,000	1 bid	incl					
Concrete Foundations									1 bid	\$73,900.00	\$73,900				Petrichor Constructors
Concrete Footings					50	CY	\$800.00	\$40,000	1 bid	incl					
Footing Reinforcement					2,700	lb	\$1.55	\$4,185	1 bid	incl					
Anchor Bolts									1 bid	incl					
Layout and Equipment									1 bid	incl					
Sidewalk at North					1,200	SF	\$10.00	\$12,000	1 bid	\$36,350.00	\$36,350				Petrichor Constructors
Sidewalk at East					2,573	SF	\$10.00	\$25,730	1 bid	incl					
Vapor Barrier at SOG					9,000	sf	\$2.00	\$18,000	1 bid	incl					
Foundation Drainage									1 bid	incl					
North Walkway Footings					24	EA	\$800.00	\$19,200	1 bid	\$26,400.00		\$26,400			Petrichor Constructors
East Walkway Footings					8	EA	\$800.00	\$6,400	1 bid	incl					
Site Prep, clearing & Tree Removal									1 bid						
Footing Excavation					27	CY	\$80.00	\$2,133	1 bid	\$2,284.56		\$2,285			
Footing Backfill					23	CY	\$50.00	\$1,150	1 bid	incl					
Pad Footing									1 bid	incl					
Dampproofing / Drainage Mat									1 allow	\$8,000.00	\$8,000				No bids received - allowance
Subtotal							\$172,773	\$28,883			\$206,235	\$28,685	\$0	\$0	
SLAB ON GRADE															
Building Pad Aggregate base					217	CY	\$50.00	\$10,850	1 bid	incl					Superior Excavation incl. in bid above
Concrete SOG (4" thick)					122	CY	\$600.00	\$73,200	1 bid	\$118,313.00	\$118,313				Petrichor Constructors
SOG Reinforcement					12,672	lb	\$1.40	\$17,740	1 bid	incl					
Subtotal							\$101,790	\$0			\$118,313	\$0	\$0	\$0	
FLOOR & COLUMN CONSTRUCTION															
Mechanical Mezzanine (REVIEW GBC SIZE)					721	sf	\$94.20	\$67,918	1 bid	\$39,138.00	\$39,138				GBC Materials, MCV Labor
Misc. Rough Carp.									1 bid	\$18,411.00	\$18,411				GBC
Subtotal							\$67,918	\$0			\$57,549	\$0	\$0	\$0	
ROOF & COLUMN CONSTRUCTION															
North Covered Walkway									1 bid	\$64,121.00		\$64,121			Rock Hill - NO GALV.
HSS 4x4 Posts					24	ea	\$550.00	\$13,200	1 bid	incl					
Intermediate Framing					12	ea	\$1,000.00	\$12,000	1 bid	incl					
East Covered Walkway - HSS4x4									1 bid	incl					
HSS 4x4 Posts					8	ea	\$550.00	\$4,400	1 bid	incl					
Intermediate Framing					4	ea	\$1,000.00	\$4,000	1 bid	incl					
Base Plates					32	ea	\$150.00	\$4,800	1 bid	incl					
Anchor Bolts					64	ea	\$110.00	\$7,040	128	ea	\$50.00		\$6,400		
Tie-in at Building					2	ea	\$2,000.00	\$4,000	2	ea	\$2,000.00		\$4,000		
Subtotal							\$0	\$49,440			\$0	\$74,521	\$0	\$0	

DETAIL BREAKOUT

Project: **Seven Oak Middle School Classroom Addition**
 Location: 550 Cascade Drive; Lebanon, OR
 Owner: Lebanon Community Schools
 Architect: Soderstrom

Architect	Soderstrom				Budget 2.1 - 100% DD				Budget 3.0 - GMP					
Description		Quantity	Unit Price	Price	ALT. Price	Quantity	Unit Price	Price	ALT.1 Price Canopy	ALT.2 Price Roof	ALT.3 Price Wall	Comments		
Building Areas														
EXTERIOR WALLS														
	Metal Panel - A	5,550	sf	\$12.20	\$67,710	1	bid	incl				Haps Allowance		
	Metal Panel - B	800	sf	\$13.70	\$10,960	1	bid	incl						
	CMU	1,350	sf	\$28.70	\$38,745	1	bid	\$52,483.00	\$52,483					
	Insulation & Vapor Barrier	7,000	sf	\$5.00	\$35,000	1	Allow	\$92,799.00	\$92,799	\$28,503	\$15,621			
	Masonry Sealer					1	bid	incl						
	Anti Grafitti Coating	1,350	sf	\$3.00	\$4,050	1	bid	incl						
	Caulking & Sealing					1	bid	incl						
	Subtotal			\$156,465	\$0			\$145,282	\$0	\$28,503	\$15,621			
EXTERIOR WINDOWS														
	Aluminum Storefront	0	sf	\$0.00	\$0	1	bid	\$103,006.00	\$103,006			Culver OR Smith Glass		
	Aluminum Windows	216	sf	\$145.00	\$31,320	1	bid	incl						
	Translucent fiberglass panels	20	ea	\$1,000.00	\$20,000	1	bid	incl						
	Flex Flashing					1	bid	incl						
	Subtotal			\$51,320	\$0			\$103,006	\$0	\$0	\$0			
EXTERIOR DOORS														
	Storefront Doors	3	ea	\$12,500.00	\$37,500	1	bid	incl				OH Door		
	Doors/Frames Hardware - Supply	2	ea	\$3,200.00	\$6,400	1	bid	incl						
	Doors/Frames Hardware - Install	2	ea	\$510.00	\$1,020	1	bid	incl						
	Overhead Doors	2	ea	\$9,000.00	\$18,000	1	bid	\$13,928.00	\$13,928					
	Paint at doors and Frames					1	bid	incl						
	Subtotal			\$62,920	\$0			\$13,928	\$0	\$0	\$0			
ROOF COVERINGS														
	Misc. Flashings	1	ls	\$3,500.00	\$3,500	1	bid	\$27,016.00	\$27,016			Santiam		
	Gutters	280	LF	\$15.00	\$4,200	1	bid	incl						
	Sofft	78	sf	\$12.00	\$936	1	bid	incl				Santiam		
	Downspouts	180	lf	\$15.00	\$2,700	1	bid	incl						
	Joint Sealers	1	ea	\$1,500.00	\$1,500	1	bid	incl						
	North Walkway					1	bid	\$30,780.00	\$30,780					
	Metal Roof Deck	1,125	sf	\$9.00	\$10,125	1	bid	incl						
	Gutters	110	lf	\$15.00	\$1,650	1	bid	incl						
	Downspouts	42	lf	\$15.00	\$630	1	bid	incl						
	Downspouts					1	bid	incl						
	East Walkway					1	bid	incl						
	Metal Roof Deck	315	sf	\$9.00	\$2,835	1	bid	incl						
	Gutters	35	lf	\$15.00	\$525	1	bid	incl						
	Downspouts	21	lf	\$15.00	\$315	1	bid	incl						
	Fascia Flashing	280	LF	\$28.75	\$8,050	1	bid	incl						
	Subtotal			\$20,886	\$16,080			\$27,016	\$30,780	\$0	\$0			
EXTERIOR CEILING FINISHES														
	North Walkway Soffit Panels	1,125	sf	\$12.00	\$13,500	0	NONE							
	East Walkway Soffit Panels	315	sf	\$12.00	\$3,780	0	NONE							
	Paint (ALTERNATE COVERED CANOPY)					1	bid	\$13,200.00	\$13,200					
	Subtotal			\$0	\$17,280			\$0	\$13,200	\$0	\$0			

DETAIL BREAKOUT

Project: **Seven Oak Middle School Classroom Addition**
 Location: 550 Cascade Drive; Lebanon, OR
 Owner: Lebanon Community Schools
 Architect: Soderstrom

Architect	Soderstrom	Budget 2.1 - 100% DD				Budget 3.0 - GMP						
Description		Quantity	Unit Price	Price	ALT. Price	Quantity	Unit Price	Price	ALT.1 Price Canopy	ALT.2 Price Roof	ALT.3 Price Wall	Comments
Building Areas												
INTERIOR PARTITIONS												
Interior Wall Layout		1	allow	\$2,720.00	\$2,720	1	bid	\$158,900.00	\$158,900			
Wood stud wall framing - 2x4 LABOR						1	bid	incl				incl. in mezz. # above
Wood stud wall framing - 2x6 LABOR						1	bid	incl				incl. in mezz. # above
B01 Walls (assume 16' height)		1,840	sf	\$4.75	\$8,740	1	bid	incl				
B03 Walls (assume 16' height)		2,480	sf	\$4.75	\$11,780	1	bid	incl				
B04 Walls (assume 20' height)		1,200	sf	\$4.75	\$5,700	1	bid	incl				
B05 Walls (assume 20' height)		0	sf	\$4.75	\$0	1	bid	incl				
F1 Walls (assume 16' height)		240	sf	\$4.30	\$1,032	1	bid	incl				
F2 Walls (assume 16' height)		400	sf	\$4.75	\$1,900	1	bid	incl				
W2 Walls (assume 16' height))		0	sf	\$4.75	\$0	1	bid	incl				
Exterior/Perimeter Walls (assume 20' height)		7,200	sf	\$2.15	\$15,480	1	bid	incl				
Backing		1	allow	\$13,000.00	\$13,000	1	bid	\$17,808.00	\$17,808			GBC
Fasteners & Misc. Hardware						1	bid	incl				
Acoustical Insulation		6,160	sf	\$1.50	\$9,240	1	bid	incl				
Sheetrock						1	bid	incl				
B01 Walls (assume 16' height)		3,680	sf	\$3.40	\$12,512	1	bid	incl				
B03 Walls (assume 16' height)		4,960	sf	\$3.40	\$16,864	1	bid	incl				
B04 Walls (assume 16' height)		2,400	sf	\$3.40	\$8,160	1	bid	incl				
B04 Sound Board 1 side		1,200	sf	\$2.00	\$2,400	1	bid	incl				
B05 Walls (assume 20' height)		0	sf	\$3.40	\$0	1	bid	incl				
F1 Walls (assume 16' height)		480	sf	\$3.40	\$1,632	1	bid	incl				
F2 Walls (assume 16' height)		480	sf	\$3.40	\$1,632	1	bid	incl				
W2 Walls (assume 16' height))		0	sf	\$3.40	\$0	1	bid	incl				
Exterior/Perimeter Walls (assume 20' height)		7,200	sf	\$3.40	\$24,480	1	bid	incl				
Tape and finish		13,770	sf	\$3.35	\$46,130	1	bid	incl				
Painting		13,770	sf	\$1.50	\$20,655	1	bid	\$28,100.00	\$28,100			MVC
Interior Face of Exterior Wall						1	bid	incl				
Joint Sealers		1	ea	\$6,500.00	\$6,500	1	bid	incl				
Dumpster						10	ea	\$700.00	\$7,000			
Subtotal				\$210,557	\$0			\$211,808	\$0	\$0	\$0	
INTERIOR WINDOWS												
Interior Glazing		1	ea	\$5,500.00	\$5,500	1	bid	incl				
Paint Frames						0	NONE					
Subtotal				\$5,500	\$0			\$0	\$0	\$0	\$0	
INTERIOR DOORS												
Doors/Frames Hardware - Supply		10	ea	\$3,200.00	\$32,000	1	bid	\$49,995.00	\$49,995			Bell Hardware
Pair of Doors/Frames Hardware - Supply		1	ea	\$3,800.00	\$3,800	1	bid	incl				
Doors/Frames Hardware - Install		11	MH	\$510.00	\$5,610	1	bid	\$9,156.00	\$9,156			GBC
Paint door frames		11	ea	\$175.00	\$1,925	1	bid	incl				
Subtotal				\$43,335	\$0			\$59,151	\$0	\$0	\$0	

DETAIL BREAKOUT

Project: **Seven Oak Middle School Classroom Addition**
Location: 550 Cascade Drive; Lebanon, OR
Owner: Lebanon Community Schools
Architect: Soderstrom

Architect	Soderstrom	Budget 2.1 - 100% DD				Budget 3.0 - GMP							
Description		Quantity	Unit Price	Price	ALT. Price	Quantity	Unit Price	Price	ALT.1 Price Canopy	ALT.2 Price Roof	ALT.3 Price Wall	Comments	
Building Areas													
FITTINGS AND SPECIALTIES													
	White Boards	3	ea	\$2,200.00	\$6,600	1	bid	\$19,994.00	\$19,994			GBC - Backing & Installation ONLY. All Visual Display Units are OFCI	
	Tack Boards - 4x8	11	ea	\$1,250.00	\$13,750	1	bid	incl					
	Tack Boards - 4x4					1	bid	incl					
	Ships Ladder	1	ea	\$5,500.00	\$5,500	1	bid	incl				Fast Signs ROOM SIGNAGE	
	FEC	2	ea	\$690.00	\$1,380	1	bid	incl					
	Knox Box	1	ea	\$840.00	\$840	1	ea	\$840.00	\$840				
	Interior Signage	14	ea	\$450.00	\$6,300	1	bid	\$624.00	\$624				
	Toilet Accessories					1	bid	\$5,604.00	\$5,604				
	Grab Bars	3	ea	\$315.00	\$945	1	bid	incl				GBC/BMS	
	OFCI Restroom Accessories Install (TP, PT, SD)	12	ea	\$200.00	\$2,400	1	bid	incl					
	Subtotal				\$37,715			\$27,062	\$0	\$0	\$0		
WALL FINISHES													
	Finish Carpentry											Paragon	
	Ceramic Tile	300	sf	\$32.00	\$9,600	1	bid	\$17,278.00	\$17,278				
	Ceramic Tile at Restrooms	500	sf	\$32.00	\$16,000	1	bid	incl					
	Door Frame Trim where Tile Occurs	1	allow	\$1,000.00	\$1,000	1	ea	\$1,500.00	\$1,500			GBC	
	Wainscot	500	sf	\$18.25	\$9,125	1	bid	incl					
	FRP	32	sf	\$16.00	\$512	1	bid	\$3,659.00	\$3,659				
	Corner Guards	12	ea	\$150.00	\$1,800	1	bid	incl					
	Subtotal				\$38,037			\$22,437	\$0	\$0	\$0		
FLOORING													
	Flooring					1	bid	\$74,658.00	\$74,658			Rubensteins	
	Minor Floor Prep	6,500	sf	\$0.40	\$2,600	1	bid	incl					
	PC (Polished Concrete)	6,150	sf	\$8.15	\$50,123	1	bid	incl					
	Mock-up	1	allow	\$2,000.00	\$2,000	1	bid	incl					
	SC (Sealed Concrete)	75	sf	\$7.00	\$525	1	bid	incl					
	Mock-up	1	allow	\$2,000.00	\$2,000	1	bid	incl					
	Floor Covering					1	bid	incl					
	PRF (Epoxy)	240	sf	\$30.00	\$7,200	1	bid	incl					
	PRF (Epoxy) - 6" COVE	120	lf	\$60.00	\$7,200	1	bid	incl					
	PRF Mock-Up	1	ea	\$3,000.00	\$3,000	1	bid	incl					
	RB (Rubber Base)	770	lf	\$3.00	\$2,310	1	bid	incl					
	Subtotal				\$76,958			\$74,658	\$0	\$0	\$0		
CEILING FINISHES													
	ACT Ceilings	3,100	sf	\$8.50	\$26,350	1	bid	incl				Not captured in PEMB or SM num	
	ACT Ceilings - 2x2	300	sf	\$8.50	\$2,550	1	bid	incl					
	Gyp Ceiling Framing	250	sf	\$9.15	\$2,288	1	bid	incl					
	Gyp Ceiling Insulation	250	sf	\$1.40	\$350	1	bid	incl					
	Gyp Ceiling Rock	250	sf	\$3.50	\$875	1	bid	incl					
	Gyp Ceiling Tape and Finish	250	sf	\$3.15	\$788	1	bid	incl					
	Gyp Ceiling Paint	250	sf	\$3.45	\$863	1	bid	incl					
	Exterior Soffit (DEFINE MATERIAL)	80	sf	\$30.00	\$2,400	80	sf	\$35.00	\$2,800				
	OTS Paint	2,600	sf	\$2.00	\$5,200	1	bid	incl					
	Subtotal				\$41,664			\$2,800	\$0	\$0	\$0		
PLUMBING FIXTURES													
	Fixtures	4	ea	\$3,600.00	\$14,400	1	bid	incl					
	Mop Sink					1	bid	incl					
	Washfountains	2	ea	\$11,000.00	\$22,000	1	bid	incl					
	Hot Water Heater	1	ea	\$3,800.00	\$3,800	1	bid	incl					
	Water Fountain	2	ea	\$4,200.00	\$8,400	1	bid	incl					
	Housekeeping pad	1	ea	\$2,000.00	\$2,000	1	ea	\$2,000.00	\$2,000				
	Fixture Accessories					1	bid	incl					
	Subtotal				\$50,600			\$2,000	\$0	\$0	\$0		

DETAIL BREAKOUT

Project: **Seven Oak Middle School Classroom Addition**
 Location: 550 Cascade Drive; Lebanon, OR
 Owner: Lebanon Community Schools
 Architect: Soderstrom

Architect	Soderstrom	Budget 2.1 - 100% DD				Budget 3.0 - GMP							
Description		Quantity	Unit Price	Price	ALT. Price	Quantity	Unit Price	Price	ALT.1 Price Canopy	ALT.2 Price Roof	ALT.3 Price Wall	Comments	
Building Areas													
PLUMBING PIPING, ACCESSORIES, GCS													
Domestic Hot and Cold		1	allow	\$45,000.00	\$45,000	1	bid	\$108,547.00	\$108,547			Complete OR II-S	
Cast Iron Downspouts						1	bid	incl	\$6,420				
Sanitary (Underground)						1	bid	incl					
Sanitary		150	lf	\$58.00	\$8,700	1	bid	incl					
Vent Piping						1	bid	incl					
Piping Accessories						1	bid	incl					
Hose Bibb (interior)						1	bid	incl					
Hose Bibb (Exterior)						1	bid	incl					
Floor Drains						1	bid	incl					
Cleanout						1	bid	incl					
Recirculation Pump						1	bid	incl					
Specialties & Accessories						1	bid	incl					
Natural Gas Piping						415	lf	\$18.00	\$7,470				from € meter to new meter
Plumbing General Conditions						1	bid	incl					
Subtotal				\$53,700	\$0			\$116,017	\$6,420	\$0	\$0		
HVAC DISTRIBUTION SYSTEM													
Mechanical		6,900	sf	\$31.00	\$213,900	1	bid	\$299,000.00	\$299,000			Santiam Heating	
Electric Unit Heater						1	bid	incl					
Split Systems						1	bid	incl					
Twinned Split System						1	bid	incl					
Gravity Roof Hood						1	bid	incl					
Exhaust Fan						1	bid	incl					
Curbs, Pads and Accessories						1	bid	incl					
Ductwork						1	bid	incl					
Duct Insulation						1	bid	incl					
GRDs						1	bid	incl					
Refrigerant Piping						1	bid	incl					
Condensate Piping						1	bid	incl					
Controls						1	bid	incl					\$85k value for controls
Air Balancing						1	bid	incl					
Seismic Devices & Engineering						1	bid	incl					
Crane & Rental Equipment						1	bid	incl					
Expendables						1	bid	incl					
Startup						1	bid	incl					
HVAC General Conditions						1	bid	incl					
Subtotal				\$213,900	\$0			\$299,000	\$0	\$0	\$0		
FIRE PROTECTION													
Fire Sprinkler - Wet		0	sf	\$0.00	\$0	0	NONE					NONE	
Fire Sprinkler - Dry		0	sf	\$0.00	\$0	0	NONE						
Subtotal				\$0	\$0			\$0	\$0	\$0	\$0		

DETAIL BREAKOUT

Project: **Seven Oak Middle School Classroom Addition**
 Location: 550 Cascade Drive; Lebanon, OR
 Owner: Lebanon Community Schools
 Architect: Soderstrom

Architect	Soderstrom	Budget 2.1 - 100% DD				Budget 3.0 - GMP						
Description		Quantity	Unit Price	Price	ALT. Price	Quantity	Unit Price	Price	ALT.1 Price Canopy	ALT.2 Price Roof	ALT.3 Price Wall	Comments
Building Areas												
ELECTRICAL & LOW VOLTAGE												
Electrical Service		1	ea	\$8,500.00	\$8,500	1	bid	\$422,740.00	\$422,740			RWE
Relocate Shed Panel Feeder						1	bid	incl				
Electrical Circuitry		6,900	allow	\$28.90	\$199,410	1	bid	incl				
Interior Lighting						1	bid	incl				
RA4 (2x4)		39	ea	\$600.00	\$23,400	1	bid	incl				
D4 (Cans)		18	ea	\$400.00	\$7,200	1	bid	incl				
HB1		15	ea	\$500.00	\$7,500	1	bid	incl				
I4		2	ea	\$400.00	\$800	1	bid	incl				
I8		3	ea	\$400.00	\$1,200	1	bid	incl				
Exit Signs		5	ea	\$400.00	\$2,000	1	bid	incl				
V4 (Interior at Restroom)		2	ea	\$600.00	\$1,200	1	bid	incl				
Exterior Lighting						1	bid	incl				
HB2		10	ea	\$600.00	\$6,000	1	bid	incl				
V4		11	ea	\$600.00	\$6,600	1	bid	\$5,600.00	\$5,600			RWE
Lighting Controls						1	bid	incl				
Branch Wiring						1	bid	incl				
Wall Packs		10	ea	\$600.00	\$6,000	1	bid	incl				
Lighting Controls						1	bid	incl				
Devices & receptacles						1	bid	incl				
Equipment Connections						1	bid	incl				
Branch Wiring						1	bid	incl				
Temp Power & Lighting						1	bid	incl				
Arc Flash & System Testing						1	bid	incl				
Seismic & Firestopping						1	bid	incl				
Electrical General Conditions						1	bid	incl				
Low Voltage		6,900	sf	\$5.80	\$40,020	1	bid	incl				
Temp protection and access from (e) Closet		1	ea	\$7,800.00	\$7,800	1	bid	incl				
AV		6	ea	\$2,800.00	\$16,800	1	bid	incl				
Speakers		8	ea	\$1,200.00	\$9,600	1	bid	incl				
Clock						1	bid	incl				
Access Controls		3	ea	\$3,200.00	\$9,600	1	bid	incl				
Video Survelance						1	bid	incl				
Fire Alarm		6,900	sf	\$4.75	\$32,775	1	bid	incl				
Jobsite Office Power						9	mos	\$350.00	\$3,150			
Subtotal				\$379,805	\$6,600			\$425,890	\$5,600	\$0	\$0	
OTHER EQUIPMENT												
Basketball Backboards		2	ea	\$7,500.00	\$15,000	1	bid	\$10,595.00	\$10,595			H2I
Projection Screens (OFCI)		3	ea	\$720.00	\$2,160	1	bid	incl				
Projectors						1	bid	incl				
Subtotal				\$17,160	\$0			\$10,595	\$0	\$0	\$0	

DETAIL BREAKOUT

Project: **Seven Oak Middle School Classroom Addition**
Location: 550 Cascade Drive; Lebanon, OR
Owner: Lebanon Community Schools
Architect: Soderstrom

Architect	Soderstrom	Budget 2.1 - 100% DD				Budget 3.0 - GMP						
Description		Quantity	Unit Price	Price	ALT. Price	Quantity	Unit Price	Price	ALT.1 Price Canopy	ALT.2 Price Roof	ALT.3 Price Wall	Comments
Building Areas												
FIXED FURNISHINGS												
Casework		9	lf	\$300.00	\$2,700	1	bid	\$38,070.00	\$38,070			ACD
Base Cabinets						1	bid	incl				
Countertops						1	bid	incl				
Fixed Casework Cabinets		3	ea	\$1,250.00	\$3,750	1	bid	incl				
Window Coverings		12	ea	\$800.00	\$9,600	1	bid	\$6,100.00	\$6,100			Valley Shade
Subtotal				\$16,050	\$0			\$44,170	\$0	\$0	\$0	
SPECIAL STRUCTURES												
Pre-Engineered Metal Building - Supply		9,000	sf	\$20.94	\$188,460	1	bid	\$246,559.00	\$246,559			ABS
Pre-Engineered Metal Building - Erector		9,000	sf	\$21.00	\$189,000	1	bid	\$213,359.00	\$213,359			GRS
Roof Insulation System						1	bid	incl				
Wall Insulation System						1	bid	incl				
Standing Seam Metal Roof						1	bid	incl				
Subtotal				\$377,460	\$0			\$459,918	\$0	\$0	\$0	
BUILDING MISCELLANEOUS												
Protection & Security						1	ea	incl				
Mock Ups						1	ea	incl				
Subtotal				\$0	\$0			\$0	\$0	\$0	\$0	
Facilitiy Construction & Services Subtotal				\$2,196,512.73	\$118,283.33			\$2,426,834.94	\$159,205.56	\$28,503.00	\$15,621.00	

DETAIL BREAKOUT

Project: **Seven Oak Middle School Classroom Addition**
 Location: 550 Cascade Drive; Lebanon, OR
 Owner: Lebanon Community Schools
 Architect: Soderstrom

Architect	Soderstrom				Budget 2.1 - 100% DD				Budget 3.0 - GMP						
Description					Quantity	Unit Price	Price	ALT. Price	Quantity	Unit Price	Price	ALT.1 Price Canopy	ALT.2 Price Roof	ALT.3 Price Wall	Comments
Building Areas															
Site & Infrastructure															
SITE EARTHWORK															
	Mobilizaton/Demob	1	allow	\$4,100.00		\$4,100			1	bid	incl				
	Erosion Control	1	allow	\$3,785.00		\$3,785			1	bid	\$3,400.00	\$3,400			
	Clear and Grub	1	ea	\$2,500.00		\$2,500			1	bid	incl				
	Fencing at Playground for trenching	800	LF	\$6.15		\$4,920			800	LF	\$6.15	\$4,920			
	Excavation	130	CY	\$100.00		\$13,000			1	bid	incl.				
	Grading at Sidewalks	380	sf	\$5.00		\$1,900			1	bid	incl				
	Survey	1	ea	\$10,000.00		\$10,000			1	ea	\$10,000.00	\$10,000			
	Emergency Access Roadway Mods	1	allow	\$12,500.00		\$12,500			1	bid	\$13,438.77	\$13,439			
	Repave AC at Contruction Access								1	allow	\$17,000.00	\$17,000			Allowance
	Subtotal					\$52,705	\$0				\$48,759	\$0	\$0	\$0	
PAVING & CURBS															
	Asphalt Patch	1	allow	\$10,000.00		\$10,000			1	bid	\$17,211.00	\$17,211			Superior Excavation
	Curbs								1	bid	\$2,000.00	\$2,000			Petrichor Constructors
	Subtotal					\$10,000	\$0				\$19,211	\$0	\$0	\$0	
LANDSCAPING															
	Landscaping	1	allow	\$27,000.00		\$27,000			1	bid	\$45,636.00	\$45,636			Gelnco OR Upwards
	Irrigation	1	allow	\$15,000.00		\$15,000			1	bid	incl				
	Subtotal					\$42,000	\$0				\$45,636	\$0	\$0	\$0	
SITE UTILITIES															
	Utilities								1	bid	\$260,596.45	\$260,596			Superior Excavation
	Remove Existing Utilities (C103)	1	allow	\$8,600.00		\$8,600			1	bid	incl.				
	Fire Water	515	lf	\$227.00		\$116,905			1	bid	incl.				
	Fire Vault & DDC	0	ea	\$0.00		\$0			1	bid	incl.				
	Fire Hydrant	1	ea	\$7,500.00		\$7,500			1	bid	incl.				
	Bollards	2	ea	\$750.00		\$1,500			4	ea	\$750.00	\$3,000			
	Asphalt Sawcut, Patch, Curb								1	bid	incl.				
	Domestic Water	1	allow	\$5,700.00		\$5,700			1	bid	incl.				
	2" & 2-1/2" PVC Water								1	bid	incl.				
	2" Gate Valves								1	bid	incl.				
	2-1/2" Gate Valves								1	bid	incl.				
	Sanitary Tie-In	1	allow	\$57,000.00		\$57,000			1	bid	incl.				
	Connect to existing								1	bid	incl.				
	Sanitary Cleanout								1	bid	incl.				
	Asphalt Sawcut, Patch								1	bid	incl.				Superior Excavation
	Storm Line Tie-In	1	allow	\$22,000.00		\$22,000	\$6,000		1	bid	incl.				
	8" SD	350	lf	\$95.00		\$33,250			1	bid	incl.				
	Sawcut & Patch	700	sf	\$12.00		\$8,400			1	bid	incl.				
	Gas Pipe trench & sleeve								415	lf	\$18.22	\$7,561			
	Addendum 1 (Fire line fittings, trenching, backfill, shoring)								1	bid	\$15,368.00	\$15,368			Due to incorrect scale on civil plans, corrected Addendum 1
	Subtotal					\$260,855	\$6,000				\$286,526	\$0	\$0	\$0	
SITE ELECTRICAL															
	Electrical Trenching	100	LF	\$100.00		\$10,000			1	bid	incl.				
	Feeder Wiring								1	bid	incl.				
	Conduit & Pull Boxes								1	bid	incl.				
	Subtotal					\$10,000	\$0				\$0	\$0	\$0	\$0	
Site & Infrastructure Subtotal							\$375,560.00	\$6,000.00			\$400,131.52	\$0.00	\$0.00	\$0.00	



Lebanon Community Schools – Seven Oak Middle School

AMENDMENT 02 – GMP

5/2/2023

Updated 5/9/2023

EXHIBIT B – Scope Clarifications

The narrative is a written explanation clarifying the assumptions and exclusions used in establishing the GMP Amendment 02 dated [May 2, 2023](#), updated [5/8/2023](#).

GENERAL NOTES

1. GMP is based on the Soderstrom Architects 100% CD drawings and specifications dated 3/3/23, listed in the Exhibit B – List of Drawings and Specifications.
2. Lebanon Community Schools (LCS) pays for building permit (trade permits including mechanical, electrical, plumbing will be by GBC through future Amendment), SDC's and other soft (owner cost permits).
3. City, owner and/or plan check comments are not included.
4. Alternates 1 (walkway canopy) and 3 (spray foam insulation at wall assembly) are included in the GMP.
5. Builders Risk policy will be carried by GBC and is included in the GMP.

COSTS TO BE CARRIED BY LCS – INDIRECT COSTS – AMOUNTS ARE NOT INCLUDED IN GMP

1. Hazardous material abatement and testing.
2. Soils report.
3. Site Survey.
4. Furniture and/or soft goods.
5. Furnish of Visual Displays (Install by included in GMP).
6. DIV 27 and 28 Owner Furnish Items as indicated on the DIV 27 & 28 Scope of work matrix on Sheet E0.04.
7. Moving or relocation costs.
8. All design fees.
9. Weather delays (in accordance with Articles 8 and 15 of AIA 133).
10. Final cores and keying.

SCOPE OF WORK CLARIFICATIONS

Concrete (From Amendment 1)

1. Site concrete is based off the 3/6/23 95% documents.
2. Structural concrete is based off the 3/6/23 95% documents.
 - a. Once PEMB vendor is on board in future Amendment and footing reactions are determined, there may be a PR required to address changes to footings from the 3/6/23 bid documents.

Masonry

1. Includes ground face CMU, with precast top cap.
2. Includes washing and graffiti sealing masonry.

Structural Steel (Accepted Alternate 1 Scope)

1. This is included in Alternate 1, walkway canopy pricing and is included in the GMP.
2. Includes an allowance for roof decking.
3. Structural steel is priced to be primed and painted. Galvanized structural steel at canopy is not included in alternate pricing.

Rough Carpentry

1. Wood framing included per Structural drawings.
2. Fire treated wood backing for wall hung accessories is included.

Casework

1. Includes built-in casework, and solid surface sills.
2. Plam wainscot at corridors is included in GMP. See optional VE item to replace plam wainscot with Acrovyn wall protection.

Sheetmetal

1. Includes gutters and downspouts down to 8' above grade (to connect with cast iron down spout by Plumber).
2. Allowance included for metal soffit at (2) entrances, not covered by PEMB supply.
3. Includes SAM window flashing and WRB.
4. Alternate #1 pricing includes fascia, gutters and downspouts at walkway canopies.

Insulation

1. Allowance carried for base scope insulation at this time.
2. Pricing for Alternate 2 (roof assembly) and Alternate 3 (wall assembly) are being refined.

Dampproofing

1. Allowance carried for dampproofing/drainage mat at foundation at this time.

Doors, Frames & Hardware

2. Hardware group #12 shows Door #240, however, opening #240 is not listed on the door schedule or floor plans, therefore hardware for Door #240 is not included.
3. Rated doors (20-min) included per Addendum #1.
4. Fire rated glazing at doors carrier by glazer.
5. Includes storefront door hardware supply. Install by glazer.
6. Final cores and keying by owner.

Overhead Doors

1. There is no glazing included at Overhead doors per 083613, 2.02, as elevations do not indicate doors to have glass.
2. It is recommended any specified locks and associated interlocks (083613, 20.5) be eliminated. Keyed control stations are provided and hand chain backup can be padlocked by owner for only authorized users to be able to operate door. Physical locks on electric operated doors are strongly discouraged and may interrupt the motor.

Glazing

1. Includes storefront doors (and storefront door hardware install, furnish by others) and windows.
2. Fire rated glazing at doors per Addendum #1.
3. Does not include any auto openers at man doors.

Walls and Ceilings

1. Walls and ceilings are priced off of the Bid Documents, including Addendum 1.
2. Note, there appears to be a break in the fire wall assembly at the restroom opening. Fire wall continuation should be reviewed. GMP does not include any fire rated doors or assemblies at the opening through the fire wall into to the restroom.

Painting

3. Open to structure painting included at Fitness #232 and Covered Play #239.
4. Does not include open to structure painting at back of house locations, including Room #232A, Storage #232B, #234 and Cust #235.
5. Alternate #1 pricing includes painting structural steel at canopy.

Flooring

1. Includes mock-ups for polished concrete and epoxy flooring.

Pre-Engineered Metal Building (PEMB)

1. Includes supply and erection of PEMB.
2. Shop drawings for PEMB will need a quick review by the design team.
 - a. NOTE: Structural concrete bid is based off the 3/6/23 95% documents. Once PEMB vendor completes shop drawings and review is complete by Design team and footing reactions determined, there may be a PR required to address changes to footings from the 3/6/23 bid documents.

Plumbing

1. Includes trade permit.
2. Includes cast iron downspouts up to 8' above grade.
3. Includes gas piping from existing meter to building.

Mechanical

1. Includes trade permit.
2. Includes Distech Controls. See optional VE item ROM to change from Distech controls to an alternate controls system.
3. Includes gas and condensate piping within building.

Electrical, Communications, AV, Security, Access Controls

1. Includes trade permit.
2. Includes DIV 27 & 28 as defined on DIV 27 & 28 Scope of work matrix on Sheet E0.04.
3. Includes trenching and backfill for electrical.

Landscaping

1. Minimal irrigation, seeding and back/mulch are included at this time.
2. Further review of landscaping with LCS, HMK, SDRA, GBC and selected landscaping sub to confirm extent of scope is both covered and meets the expectations of LCS and City of Lebanon.

Site Work

1. Site work is based off the 3/6/23 95% documents. (From Amendment 1)
2. Allowance for fire line paving repairs is included in GMP.
3. Includes added fire line and gas line length per Addendum 1 correction of scale on Civil plans.

General Conditions and Site Requirements (Per GC Matrix)

1. Based on normal working hours, starting at 7:00am – 3:30pm, Monday – Friday.
2. Includes temporary logistics to delineate construction site from the school.
3. Access will be from bus drop-off area, per Preliminary Site Logistics plan.

Other/MISC.

3. Contingency, including for Amendment 1 total, is included.
4. Estimating contingency of 7.5% has been changed to Construction contingency at 5.0%.
5. Assistance with coordinating commissioning and testing from third party consultants is included, however anything additional is not included in GMP as third party consultant commissioning and test plans have not been received or reviewed at this time.

END OF DOCUMENT



Lebanon Community Schools – Seven Oak Middle School

AMENDMENT 02 – GMP

5/2/2023

Updated 5/9/2023

EXHIBIT B – Allowances

ALLOWANCES	GMP VALUE	ALTERNATE VALUE	NOTES
Dampproofing/Drainage Mat at perimeter footing	\$8,000.00	-	Included in GMP
ALTERNATE #1 – Walkway Canopy Roof Decking	-	\$13,000.00	Included in Alternate #1. This allowance is included within the Rock Hill Bid line item. Included in GMP
Building Insulation – Rigid Insulation	\$92,799.00	-	Included in GMP
Metal Soffit at (2) Entrances	\$2,800.00	-	Included in GMP
ALTERNATE #2 – Roof Assembly Rigid Insulation	-	\$ 28,503.00	Included in Alternate #2 NOT included in GMP
ALTERNATE #3 – Wall Assembly Rigid and Spray Foam	-	\$15,621.00	Included in Alternate #3 Included in GMP
Replace AC at Fire Lane Access	\$17,000.00	-	Included in GMP
Builders Risk Policy	\$6,500.00		Included in GMP
SUBTOTAL =	\$ 127,099.00	\$57,124.00	
GMP Allowance Total, With Alternate =	\$ 155,720.00		

END OF DOCUMENT



Lebanon Community Schools – Seven Oak Middle School

AMENDMENT 02 – GMP

5/2/2023
Updated 5/10/2023

EXHIBIT B – Alternates

#	ALTERNATES	VALUE	INCL. IN GMP?	DECISION DATE REQUIRED
1	Walkway Canopy – Concrete Footings and Site Work (*NOTE THIS IS A PARTIAL ALTERNATE COST AND DOES NOT INCLUDE ANY OF THE CANOPY STRUCTURE, SHEETMETAL, GUTTERS OR DOWNSPOUTS)	\$ 179,019.16	YES	7/24/2023
2	Roof Assembly – Install Rigid insulation Type I and II per Detail 7/A0.12	\$ 37,779.27	NO	6/1/2023
3	Wall Assembly – Install spray foam insulation at wall assembly per Details 3&4/A0.12	\$ 30,436.61	YES	6/1/2023
	ALTERNATE SUBTOTAL =	\$ 247,235.04		
	ACCEPTED ALTERNATE TOTAL =	\$ 209,455.77	YES	

END OF DOCUMENT



Lebanon Community Schools – Seven Oak Middle School
AMENDMENT 02 – GMP

5/2/2023

Updated 5/9/2023

EXHIBIT B – Value Engineering

VE #	ACCEPTED VE ITEMS	VALUE	RECOMMENDED	INCLUDED IN GMP
B1.0	Replace fiberglass sandwich panels with clear tempered storefront. (Would these require window coverings?)	(\$17,000.00)	YES	NO
C1.0	Replace PLam wainscot at Corridors with Acrovyn wainscot	(\$10,590.00)	NO – minimal value added	NO
D1.0	Look at changing controls system from Distech to an alternate system (Review of specifications should be done)	(\$50,000.00)	Maybe – not if deviating from what is existing	NO
	POTENTIAL TOTAL =	(\$77,590.00)		

Value Engineering Log

Job Name: Lebanon 7Oak Middle School
Job No. 23009
5/2/2023
Date: Updated 5/9/2023
Document: SDRA 100% CD Dated 3/3/23



			Team Recommendation					Owner Decision			Comments / Action Required	Responsible Party
ITEM #	System VE Description	Pending ROM Value	Design Team	Adjust Estimate Assumption	Not Recommended	Further Study Needed	Recommended	Owner Decision	Accepted	Rejected		
				Reconcile	No	Maybe	Yes		Yes	No		
	A - STRUCTURE											
A 1.0	NONE	\$ -	-	-	-	-	-	-	-	-	-	
	B - SHELL											
B 1.0	Replace Fiberglass Sandwich panels with Clear Tempered Storefront	\$ (17,000.00)	x				X	-	-	-	Potential Option	
	C - INTERIORS											
C 1.0	Replace Plam Wainscot at Corridors with Acrovyn Wainscot	\$ (10,590.00)	x	-	X	-	-	-	-	-	W/ redesign and changing appearance, minimal value saved	
	D - SERVICES - MEP											
	D - FIRE SPRINKLERS											
		\$ -										
	D - PLUMBING											
		\$ -										
	D - MECHANICAL HVAC											
D1.0	Change Distech Controls	\$ (50,000.00)	x				X				Review of specifications should be done	
	D - ELECTRICAL											
	D - LOW VOLTAGE											
	D - FIRE ALARM											
	D - ACCESS CONTROLS											
	E - EQUIPMENT & FURNISHINGS											
E 1.0												
	F - SPECIAL CONSTRUCTION & DEMOLITION											
F 1.0												
	G - SITEWORK											
G 1.0												
	H - GENERAL											
H 1.0												
	SUBTOTALS	\$ (77,590.00)		\$ -	\$ -	\$ -	\$ -		\$ -	\$ -		
	TOTALS	\$ (77,590.00)	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -		



Lebanon Community Schools – Seven Oak Middle School

AMENDMENT 02 – GMP

5/2/2023

Updated 5/9/2023

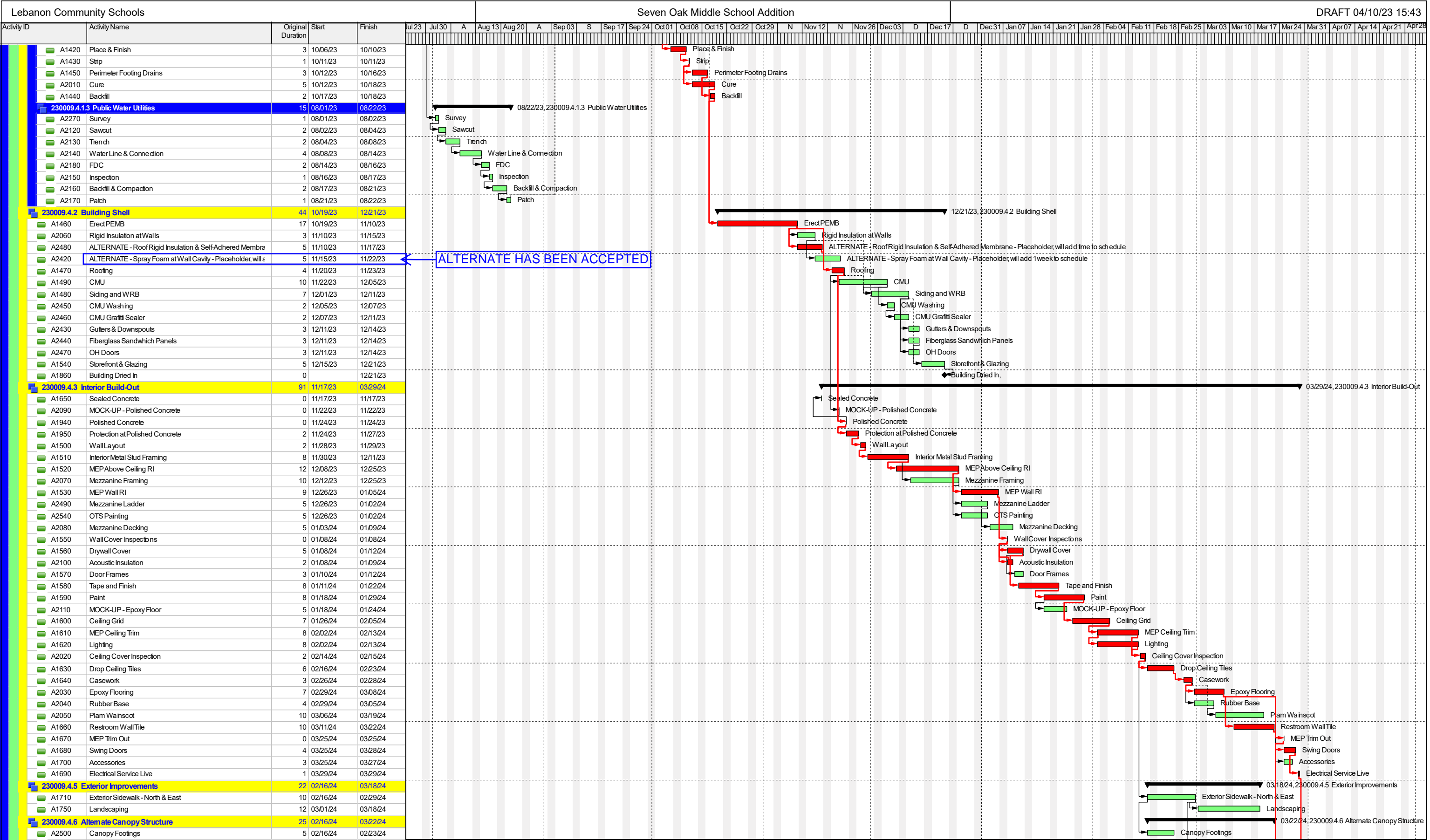
EXHIBIT C – Project Schedule

Items to Note:

1. The schedule defines intended sequence for concrete and site work construction. The project will commence in the last week of July/first week of August and be substantially complete by April 15, 2023.
2. This schedule assumes Executed GMP received by no later than 5/17/23.
3. With the acceptance of Alternate 3 for spray foam add at wall assembly, the Substantial date of completion shall be updated to 4/22/2024.
4. Shall Alternate #2 be accepted, additional time will need to be added to the schedule for the added sequencing of scopes of work.

END OF DOCUMENT

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Page 2 of 3

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Lebanon Community Schools – Seven Oak Middle School

AMENDMENT 02 – GMP

5/2/2023

Updated 5/9/2023

EXHIBIT C – Project Site Logistics

The preliminary logistics defines GBC's intended site logistics with our anticipated site access, parking, laydown, etc. for construction. Site access will be routed through the North access through the School Bus drop-off/pick-up and will require coordination.

Bus Drop-Off /Pick-Up times are as follows:

M/T/Th/F

Drop-Off: 8:15am – 8:35am

Pick-Up: 3:15pm – 3:35pm

Wednesday

Drop-Off: 8:15am – 8:35am

Pick-Up: 1:15pm – 1:35pm

END OF DOCUMENT

Plan #1 - General Exterior Site Plan

Dated 3/6/2023 - Draft

Bus Pickup/Dropoff

M/T/Th/F
8:15-8:35 am
3:15-3:35 pm

Wednesday
8:15-8:35 am
1:15-1:35 pm

Construction parking
and laydown

Bus drop off & pick up



Seven Oak
Middle School

Cascade Dr

Legend

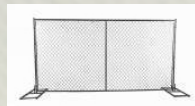
Project Site
Parking & Laydown Construction Office

Construction Site Access

Use construction fencing to secure project site

Gate with lock for drive access
*Coord. Knox lock on gate with Fire Dept. to maintain fire
access lane

Use Jersey Barrier Fence between project site and playground



Signs

S1

No
Construction
Access

GBC
CONSTRUCTION

S2

CONSTRUCTION
ACCESS

GBC
CONSTRUCTION

S3

NO ENTRY

CONSTRUCTION ACCESS
ONLY

GBC
CONSTRUCTION

NO Construction
Access or Parking in
Hatched Area

Maintain playground
No construction access
during academic school
year

S1