



MEMORANDUM

TO: Board of Directors

FROM: Dr. Greg Baker, Superintendent

DATE: December 14, 2023

SUBJECT: **Monitoring Report for EL-9, Asset Maintenance and Protection**

I certify that the following is accurate as of August 31, 2023. The reporting period is from September 1, 2022 through August 31, 2023.

Policy Type: Executive Limitation

Policy: EL-9, Asset Maintenance and Protection
(A copy of the Executive Limitation is attached)

Adopted: September 10, 2009; revised August 9, 2012; June 27, 2013,
September 11, 2014, January 12, 2017, November 1, 2017, February
27, 2019, reviewed March 16, 2022; updated September 14, 2022

Interpretation of Items:

- The five-year plan for managing, developing and improving facilities is comprised of projects associated with bond issues approved by voters:

February 18, 2022	\$122 million
February 13, 2018	\$155 million
November 5, 2013	\$160 million

- The Loss Experience Factor is a number calculated by the Washington State Department of Labor and Industries indicating the effectiveness of our Workers Compensation Safety Program.

Background Information: This report pertains to Executive Limitation 9, Asset Maintenance and Protection. It was prepared in collaboration with staff from Operations, including Capital Projects, Facilities and Sustainability and Transportation, as well as Risk Management, Educational Technology, and our Grant Writer and Special Projects Manager. Information indicating compliance for each of the areas is presented below.

Description of Evidence of Compliance:

- 1. The superintendent shall not fail to take all reasonable and prudent actions with respect to maintaining and protecting district property that are typical for similar and highly effective organizations.**

In compliance.

Facilities and Sustainability staff maintain district property and all related systems and equipment. Bellingham's network of neighborhood schools and buildings range in age from Sunnyland Elementary (opened fall 2022) to over 100 years old, like the current District Office, the Larrabee building (housing Bellingham Family Partnership Program) and Columbia Elementary.

Facilities and Sustainability staff includes 94 employees, caring for our 29 buildings with 1.7 million square feet of building space and 280 acres of land. This year we began construction on a building new to our holdings, which will serve as the new District Office, as well as a building owned by the Whatcom Educational Credit Union and leased to our district to serve students enrolled in Community Transitions. The WECU building is made available to us as part of a generous collaboration with WECU staff; our district was able to work with the WECU team to design and complete building upgrades, and our district will do much of the daily maintenance and upkeep of the building for the duration of our occupancy.

As we planned to expand the number of buildings our Facilities and Sustainability team care for, we also experienced attrition in staffing as part of district-wide budget reductions. We shifted from having 109 staff in the 2021-2022 school year to 94 staff at the end of 2022-23 school year. Additionally, we continue to evaluate new maintenance needs to ensure appropriate staffing levels. For example, we find that new buildings require different custodial tasks than older buildings (e.g, new surfaces for flooring and countertops, often more glass) and new technologies require new skill sets for our staff. An example is door access: we are transitioning from keys to access buildings to an automated door access system which uses fobs. Programming fobs is a new skill we are building into our team's capabilities.

The Asset Planner facility management software has a preventive maintenance module, which automatically assigns reoccurring preventive maintenance work including annual boiler inspections and tuning, annual fire system inspections, annual programming of heating ventilation and air conditioning systems, motor lubrication, belt and pulley inspections and air filter changes. Over 131 preventive maintenance measures were

completed during the 2022-23 school year. The previous year we had more than 150 preventive maintenance measures reported in Asset Planner, and in 2019-20 we had more than 200. Variation in numbers of preventative maintenance measures is due to staff capacity (during Covid school closures our team had time for more preventive maintenance measures) and age of buildings (as we move into new buildings and older buildings are taken down, fewer preventive maintenance measures are needed).

Facilities & Sustainability by the numbers:

District property: 1.7 million square feet of building space
 280 acres
 23 school buildings
 5 operations buildings (Central Kitchen, District Office, Facilities and Sustainability, Transportation, Warehouse)
 WECU building, leased to district for Community Transitions program, maintained in collaboration with WECU

Facilities & Sustainability Staff:

	2021-22	2022-23
Facilities & Sustainability Director	1	1
Supervisors	2	2
BASE—Administrative Assistants	3	2
Custodial staff	77	68
Grounds staff	7	6
Maintenance Staff:		
Stormwater Specialist	1	1
Playground Specialist	1	1
Equipment Operator Specialist	1	1
Utility Specialist-- Turf	1	1
Journeyman Trades:		
Carpenter	3	2
Equipment Repair Specialist	1	1
Plumber	3	2
Electrician	2	2
Painter	1	1
Building Automation Technician	2	1
Warehouse Staff:		
Warehouse Lead	1	1
Warehouse Delivery/Mail Driver	1	0
Warehouse Mail Driver (180 day)	1	1

Average time to complete work requests:

	Number of work requests	Percent work requests completed in 21-day timeframe
2022-23	<u>6229</u>	<u>69</u>
2021-22	6300	92
2020-21	5021	86
2019-20	4476	98
2018-19	6527	94

Work requests by level/facility:

	2021-22	2022-23
High school	1661	1555
Middle school	1231	1166
Elementary school	3025	2896
Support facilities	1034	612

Service requests by trade:

	2021-22	2022-23
Carpentry	1428	1668
Grounds	1505	923
Electrical	525	348
Plumbing	654	608
Building Automation	179	256
Equipment Repair	219	235
Painting	279	215
Facilities admin requests: rentals, keying	257	158
Warehouse	583	528
Other	671	391

Maintenance of Transportation Assets:

	Fleet Size	New in 2022-23	On Order	Electric Vehicles	2022-23 Surplus	2023-24 Projected Surplus
School buses	75	6	12	0	3	3
Non-bus vehicles:						
Passenger vans & SUVs	29	1	0	0	0	0
Support Vehicles (Food Services, Facilities and Sustainability, Educational Technology, Transportation & Warehouse)	47	0	0	3	2	0
Traffic Safety Education	9	0	0	2	0	0
Non-bus vehicle total	85	1	0	5	2	0
Total vehicles	160	7	2	5	5	3

Our shop is led by Mike Ingham who is an ASE Certified Master School Bus Technician with 41 years of experience. The team consists of three other Journeymen mechanics with a combined experience of 56 years as mechanics.

The shop services all buses and the motor pool and completed over 2,100 work orders in the last school year. They have also received the Certificate of Achievement for Outstanding Bus Inspections for at least the last 12 years.

Protecting District Property:

District property is protected with both keyed and electronic access control, as well as intrusion and fire alarms at all sites. District facilities and assets are further protected by electronic monitoring and notification systems which inform appropriate administrators of power and network system outages. Our safety and security team and the security service with whom we contract allow us to respond in a timely manner and limit damage; our security cameras help us with any post-damage assessments that may be necessary. In the event these systems fail, district property is insured for typical hazards such as fire, wind, flood, earthquake, theft, vandalism, collision, etc. The adequacy and effectiveness of our insurance program is evidenced by legitimate property and casualty claims being managed and, if warranted, paid.

2. The superintendent may not fail to:

- a. ensure that district facilities are maintained, safe, clean, conducive to teaching and learning, and responsive to users' needs;**

In compliance.

Observations and inspections are conducted by district staff, including the director and supervisors of Facilities and Sustainability, custodians and groundskeepers. Principals and building occupants provide valuable facility condition information to the director and team to help ensure district facilities are maintained, safe, clean and conducive to student learning.

Additionally, third-party onsite and desk inspections provided by the following agencies help ensure and provide evidence that district facilities are maintained, safe, clean and conducive to student learning:

- Bellingham Fire Department
- City of Bellingham (including Public Works, Building Services)
- Whatcom County Community and Health Services (food services facilities, playgrounds)
- Department of Ecology (stormwater, wetlands, etc.)
- Northwest Clean Air Agency (indoor air quality)
- Department of Labor and Industries (elevators and electrical systems)
- Insurers (CTE classrooms, general education, science and art classrooms, playgrounds, etc.)

Asset Preservation Program (APP) scores indicate the maintained condition of certain district facilities. The APP reports predictive and preventative inspections, repairs, maintenance and re-conditioning of major building systems. Those building systems include foundations, walls, roofs, windows, doors, electrical, plumbing, heating and fire suppression.

The Office of Superintendent of Public Instruction (OSPI) prescribes Building Condition Standard APP scores for facilities based on their age. Specific scoring information is included in the attached data set.

Facility safety and responsiveness to users' needs are measured by our district's part-time management specialist who monitors and assesses student, staff and visitor accidents, and coordinates associated claims activities. Staff accident reports are reviewed daily. During the year 2022-2023, 708 Employee Injury Reports were filed. Of the 708, 573 were student related (81%) and 25 employees filed a Dept. of Labor and Industries (L&I) claim (3.5%).

A statewide measure of the effectiveness of our Workers Compensation Safety Program is our Loss Experience Factor (LEF). The LEF is assigned to us by the Washington State Dept. of Labor and Industries (L&I) and is calculated based on the number and severity of worker injury claims filed during a rolling three-year period. An LEF of 1.0 is average, meaning the frequency and severity of actual losses equals the expected losses for that classification of workers statewide. Our LEF in 2022-2023 was 1.312; in 2021-2022 we reported an LEF of 1.229.

When a staff member experiences an accident at work, the risk management specialist works with the injured worker, healthcare providers and building and department supervisors to evaluate return to work options. In addition, the risk management specialist utilizes the Dept. of Labor and Industries Stay at Work Program to help pay some of the costs associated with light duty return to work. During 2022-2023, there was one stay at work application filed for a reimbursement of \$1,557.

b. maintain an appropriate five-year plan for managing, developing and improving facilities;

In compliance.

Projects associated with bond issues approved by voters drive our five-year plan for managing, developing and improving facilities. The most recent bond issues are:

February 18, 2022	\$122 million
February 13, 2018	\$155 million
November 5, 2013	\$160 million

In 2022-23, our [Sustainability Advisory Committee](#) developed the Bellingham Public Schools [Climate Action Plan](#), with targets measurable over a 5-year period for conservation and resiliency in district facilities and operations.

For the school year 2023-24, we will update the Facilities Condition Assessment, which will provide an updated Facility Master Plan, last revised in 2012-13. The Facilities Condition Assessment will evaluate the condition and projected maintenance needs of all district facility assets.

Key projects from the most recent bond issues:

Central Kitchen	2013 & 2018	Complete
Sehome HS	2013 & 2018	Complete
Transportation—shop & office	2013 & 2018	Complete
Environmental Ed Site	2013 & 2022	Continuing
District Office	2013 & 2022	Continuing

Alderwood	2018	Complete
Parkview	2018	Complete
Sunnyland	2018	Complete
Shuksan Gym	2018	Complete
Elementary School Fields	2018	Continuing
Reader Boards	2018	Continuing
Safety Upgrades	2013, 2018, 2022	Continuing

Community Transitions facility	2022	Continuing
15 th Elementary School	2022	Continuing
Planning for Roosevelt, Cozier, Columbia rebuilds	2022	Continuing
Safety, sustainability, accessibility—projects include:	2013, 2018, 2022	Continuing
• Elementary school playgrounds		Continuing
• KMS addition--classrooms		Continuing
• SQHS & Lowell ADA design additions		Continuing
• Cordata parking improvements		Complete
• KMS turf field project		Continuing
• Cordata interior improvements & wayfinding		Continuing

Energy and major system improvements completed during the reporting period include:

LED lighting	Squalicum High School—all
	Bellingham High School—Gym, Locker Rooms, Commons
New boilers	Shuksan Middle School—high efficiency condensing, 95% efficient
	Wade King-- high efficiency condensing, 95% efficient
Building automation controls upgrade	District wide, continuing

Major safety initiatives during the reporting period include:

- Professional development: Our district, along with all other Whatcom County school districts, adopted new safety protocols as outlined by the “I Love U Guys” Foundation, in partnership with professional emergency responder organizations in our community. All district leaders received trained in August 2023 for the new protocols, along with materials to lead trainings with their staff.
- Electronic access control progress continues, with fobs at more schools as materials are available.
- Increased emphasis on locking all external building doors at all times, with technology installed to support that goal.
- Two staff members trained and certified in Crime Prevention through Environmental Design.

Technology infrastructure improvements completed during the reporting period include:

Safety technology upgrades	Continued partnership with Ed Tech, Capital Projects and Operations in expanded security camera installations at our elementary schools and Community Transitions locations to support student and staff safety. Fire alarm system upgrades at Squalicum High School. Access control enhancements at Parkview Elementary. Remote entry / camera systems (AI Phones) installed at multiple locations. Fire alarm upgrades at Shuksan Middle School.
Sunnyland Elementary School	Start-up of multiple technology systems (phone, intercom, classroom displays, metro area network integration, wireless, etc.) at Sunnyland Elementary School.
Intercom Systems	Intercom installation at Roosevelt Elementary. Intercom installation at Carl Cozier Elementary. Intercom installation at Columbia Elementary. Intercom enhancements at Cordata, Birchwood and Fairhaven. Intercom installation at Lowell Elementary.
Network System Upgrades	Extended our Bellingham School District fiber optic network to our new Community Transitions facility located at the WECU property in the Birchwood neighborhood. Extended our Bellingham School District fiber optic network to our new District Office location in Barkley Village.

c. inform the board of new, discontinued or material changes in district practice with respect to #1 above; and

In compliance.

There are no known material changes to the above.

d. Provide an affirmative (or negative) statement the following actions have been taken:

i. Purchased appropriate and adequate insurance; and

Affirmative.

The district is a member of the Schools Insurance Association of Washington (SIAW), a 37-member insurance consortium. The program allows members to jointly purchase insurance coverage and provides related services, such as administration, risk management, claims administration, etc. The program provides the following forms of group purchased insurance coverage for its members: Property, Earthquake, General Liability, Auto Liability, Equipment Breakdown, Crime, Wrongful Acts Liability and

Cyber Liability. Claims are filed by members with Clear Risk Solutions, which has been contracted to perform program administration, claims adjustment and administration, and loss prevention for the program.

In 2022-23, we filed 17 standard claims with our insurer compared to 11 the prior year. Twelve claims were related to our vehicles, totaling \$72,556. Three claims were student-related and one employee-related; currently zero payments have been made on these. Finally, one claim is for water damage at Whatcom Middle School, totaling \$140,980.

ii. Assessed energy usage and implemented resource conservation methods.

Affirmative.

In 2022-23, the [Sustainability Advisory Committee](#) developed the Bellingham Public Schools [Climate Action Plan](#). The Climate Action Plan sets tactical goals for the years spanning 2023-2028 in three key areas: Facilities and Operations; Teaching and Learning; Habits and Culture. Tactical goals for Facilities and Operations include measuring energy use intensity, assessing water use and assessing waste diversion rates. Work to benchmark energy use intensity (EUI) data in the district began in 2022-23, and initial data has been shared as we begin to implement our Climate Action Plan.

Utility costs provide a measure of energy use:

2022-23 total utility costs: \$3,106,547
2021-22 total utility costs: \$2,886,994
2020-21 total utility costs: \$2,072,159
2018-19 total utility costs: \$2,299,919

3. The superintendent shall not fail to:

- a. Reduce the environmental impacts and costs of asset maintenance and protection as it relates to energy, water, waste and transportation.**
- b. Align building design and construction with an elevated standard of sustainability practices.**

Reduce the environmental impacts and costs of asset maintenance and protection as it relates to energy, water, waste and transportation.

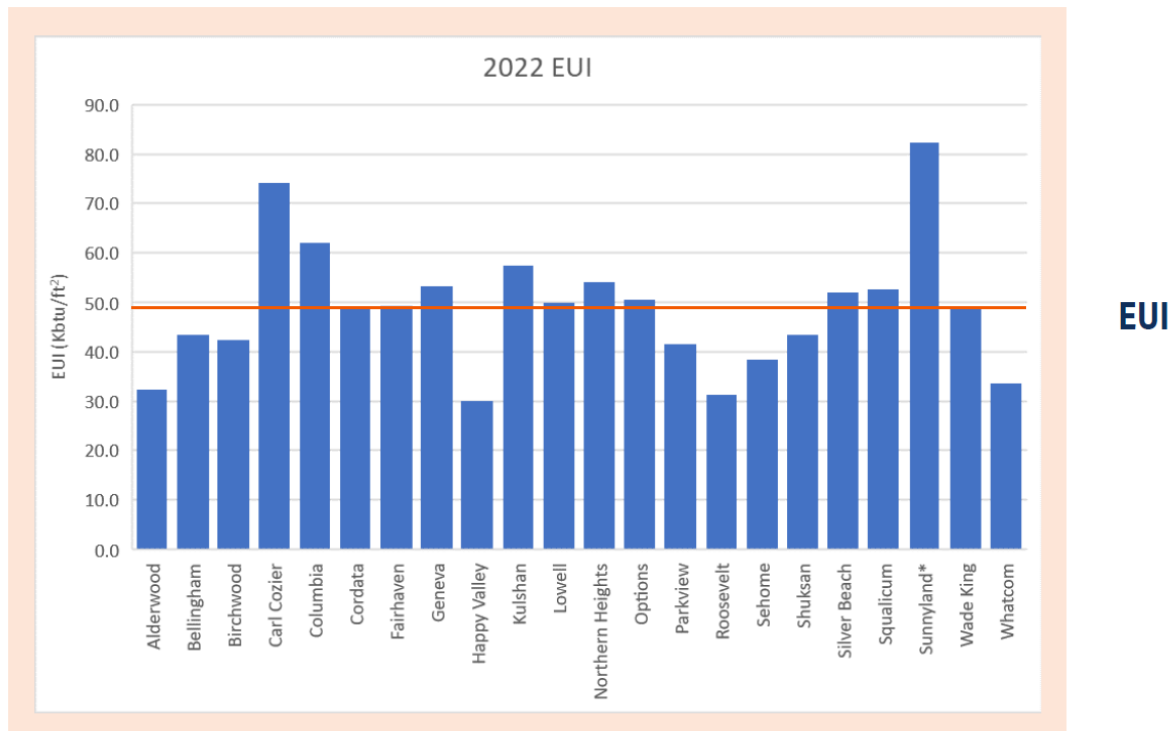
Our initial report on this executive limitation measure focuses on energy. In May 2019, the Washington State Clean Building Bill (WA HB 1257) was signed into law. The new legislation is designed to reduce pollution from fossil fuel consumption while improving energy efficiency and building performance in existing buildings, including public schools, over 50,000 gross square feet. Energy efficiency standards have been set by the Washington State Department of Commerce and include energy use intensity (EUI) as a measure. EUI refers to the amount of energy used per square foot annually by a building.

Bellingham Public Schools staff worked closely with a team of contractors from OAC Services to invite OAC to prepare an initial report of BPS EUI benchmark data. The initial draft EUI & Carbon Benchmarking Summary Report is complete as of November

2023. The report is comprehensive; data (from calendar year 2022) will be available on the BPS website.

The benchmarking report includes data from utility bills looking at electricity, natural gas and water use at each school.

School district energy use intensity scores, for 22 school buildings only (not including the Larrabee building), are below; the orange horizontal line indicates target EUI measurements for compliance with HB 1257.



Compliance with HB 1257 will be phased in, with the earliest data reporting due June 1, 2026. School buildings that do not comply with energy performance standards may be fined, with penalties dependent on gross square footage of the building and duration of continued violation.

Key findings, as summarized in the EUI & Carbon Benchmarking Summary Report, indicate that:

- 10 of 22 school buildings currently meet or exceed EUI targets set in WA HB 1257.
- 12 of 22 school buildings do not meet EUI targets.
 - Of the 12 that do not meet EUI targets, 4 are smaller than the square footage requirement and not subject to fines.

- Sunnyland Elementary benchmark data includes construction energy used on site in 2022 as well as the existing school building's energy use for the year. We anticipate lower EUI in 2023.
- 7 schools are not in compliance with EUI standards set by HB 1257.
 - 4 schools are within 0.1-3.1 EUI of standard
 - 3 schools are within 4.7-8.5 EUI of standard

In addition to energy use benchmarking, we began assessing waste in a few schools to begin developing benchmark data and a process for reporting out on the Climate Action Plan Tactical Goal 3 addressing waste.

The waste assessment was performed by staff from our community partner, RE Sources, and our director of facilities and sustainability. The assessment examined five schools (Birchwood, Cordata, Shuksan, Squalicum and Sunnyland) to gain insight into what the current waste practices are at each. The waste assessment involved looking at what types of things the school recycles and composts, the contamination of bins and how full the bins were before getting picked up by the hauler. The team also paid close attention to what the waste station set-ups in the cafeteria, teachers' lounge and classrooms included, such as compost, recycling, liquid dump bucket and clear signage. In addition to performing waste assessments, the team began meeting with a few custodians to get insight into waste practices at their school, what they find challenging and what changes they would like to see. For the next steps, RE Sources will create a document with best management practices and the gold standard at each school level for the district to use when determining what changes they want to make district-wide moving forward. We plan on performing another waste assessment at each school in spring 2024, after they have had a chance to make some improvements.

Align building design and construction with an elevated standard of sustainability practices.

The Capital Projects team's goal for building design and construction is to meet or exceed Washington Sustainable Schools Protocol (WSSP) standards for new buildings. A higher WSSP score reflects a more sustainable building. To achieve the maximum possible score would require funding beyond what was included in past bonds for BPS. We are also using WSSP to evaluate the new district office, and the interim score is reported below. The new district office is of a building type not required to meet or exceed WSSP, but our district is choosing to match the standards set by WSSP.

WSSP Scores	Final Score	Minimum Required
Happy Valley	51	45
Sehome	67	45
Alderwood	81	66
Parkview	69	66
Sunnyland	86	66
New District Office	Target: 83	66

Professional development helps us understand and define what an elevated standard of sustainability practices means in our district. Notably, with each new capital project we include sustainable building as a key value. Two examples include: planning in 2022-23 to determine a general contractor/construction management team prioritized sustainable construction experience; our Kulshan Middle School turf field committee sought more environmentally friendly materials as it built its recommendations to the superintendent.

The following upcoming projects will offer opportunities for learning and designing toward elevated standards of sustainability practices:

- Kulshan field construction
- 15th Elementary school design
- Planning for Roosevelt, Cozier and Columbia rebuilds
- Elementary inclusive playground projects

ASSET MAINTENANCE/PROTECTION AND SUSTAINABILITY/ENVIRONMENTAL RESILIENCY

The superintendent in maintaining and protecting district property shall not fail to consider the primary users of the property's needs.

1. The superintendent shall not fail to take all reasonable and prudent actions with respect to maintaining and protecting district property that are typical for similar and highly effective organizations.
2. The superintendent may not fail to:
 - a. ensure that district facilities are maintained, safe, clean, conducive to teaching and learning, and responsive to users' needs;
 - b. maintain an appropriate five-year plan for managing, developing and improving facilities;
 - c. inform the board of new, discontinued or material changes in district practice with respect to #1 above; and
 - d. provide an affirmative (or negative) statement the following actions have been taken:
 - i. purchased appropriate and adequate insurance; and
 - ii. assessed energy usage and implemented resource conservation methods.
3. The superintendent shall not fail to:
 - a. Reduce the environmental impacts and costs of asset maintenance and protection as it relates to energy, water, waste and transportation.
 - b. Align building design and construction with an elevated standard of sustainability practices.

Adopted:	9/10/2009
Previous Revisions:	8/9/2012 (combining EL-1 & EL-18); 6/27/2013; 9/11/2014; 1/14/2016
Updated:	9/14/2022

**EL-9 Data Set
December 14, 2023**

Facility Related Data																	
Year	Total Work Requests	21 Day Completion %	Number and Percent of High School Requests	Number and Percent of Middle School Requests	Number and Percent of Elementary School Requests	Number and Percent of Other Requests		Number and Percent of Carpentry Requests	Number and Percent of Grounds Requests	Number and Percent of Electrical Requests	Number and Percent of Plumbing Requests	Number and Percent of Building Automation Requests	Number and Percent of Equipment Repair Requests	Number and Percent of Painting Requests	Number and Percent of Other Requests	Number and Percent Facilities admin requests	Number and percent Warehouse requests
2022-23	6229	69%	1555	1166	2896	612		1668	923	348	608	256	235	215	391	158	528
			25%	19%	46%	19%		27%	15%	6%	10%	4%	4%	3%	6%	3%	8%
2021-22	6300	92%	1661	1231	3025	1034		1428	1505	525	654	179	219	279	671	257	583
			26%	20%	48%	16%		23%	24%	8%	10%	3%	3%	4%	11%	4%	9%
2020-21	5114	86%	948	843	2643	680		1166	1533	432	522	114	169	183	995		
			18.54%	16.48%	51.68%	13.30%		22.80%	29.98%	8.45%	10.21%	2.23%	3.30%	3.58%	19.46%		
2019-20	4476	98%	1074	926	2084	392		1335	1335	445	516	191	228	257	169		
			23.99%	20.69%	46.56%	8.76%		29.83%	29.83%	9.94%	11.53%	4.27%	5.09%	5.74%	3.78%		
2018-19	6527	98%	1583	1159	2938	847		1713	1796	690	715	267	255	266	825		
			24.25%	17.76%	45.01%	12.98%		26.24%	27.52%	10.57%	10.95%	4.09%	3.91%	4.08%	12.64%		
2017-18	6321	94%	1423	1215	3009	674		1657	1860	681	642	452	302	267	460		
			22.51%	19.22%	47.60%	10.66%		26.21%	29.43%	10.77%	10.16%	7.15%	4.78%	4.22%	7.28%		

Risk Management Data					
Year	Number of Employee Injuries Reported	Number of Employees Injured By Students	Percent of Student Related Injuries	Loss Experience Factor	Stay at Work Refund Amount
2022-2023	708	573	81%	1.312	\$1,557
2021-2022	417	295	71%	1.229	1775%
2020-21	120	49	40.80%	1.283	\$6,680
2019-20	448	350	78.13%	1.200	\$6,516
2018-19	424	314	74.06%	1.001	\$3,001
2017-18	340	235	69.12%	0.884	\$8,977

Asset Preservation Program (APP) Scores								
School	APP Age	2017 APP Score	2018 APP Score	2019 APP Score	2020 APP Score	2021 APP Score	2022 APP Score	2023 APP Score
Bellingham HS	23	79.03	78.75	77.57	81.70	79.55	79.55	73.46
Squalicum HS	24	89.12	87.87	87.87	87.87	72	82.41	85.02
Kulshan MS (Ma	29	88.34	87.39	80.94	79.89	66	79.89	77.02
Kulshan MS (Gy	29	89.81	89.01	80.94	80.94	66	77.22	76.97
Shuksan MS	14	95.23	91.78	91.78	94.21	85	92.72	84.67
Birchwood ES	9	98.84	98.84	98.27	98.27	91	95.44	94.19
Happy Valley ES	6	100.00	99.99	99.99	99.99	94	99.63	95.69