



MEMORANDUM

TO: Board of Directors

FROM: Dr. Greg Baker, Superintendent

DATE: November 30, 2022

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

I certify that the following is accurate as of August 31, 2022. The reporting period is from September 1, 2021 through August 31, 2022.

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, Education Technology, and our Grant Writer & Special Projects Manager. Information indicating compliance for each of the areas is presented below. A related data set is attached.

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.

Maintaining District Property:

Facilities and Sustainability staff maintain district property and all related systems and equipment. Bellingham's network of neighborhood schools and buildings ranging in age from our brand-new Sunnyland Elementary (opened fall 2022) to over 100 years old, like the District Office (opened before the last epidemic) means maintenance needs are constant and varied.

School year 2021-22 was the first full year of in-person school after COVID-19 closures. Service requests of our Facilities and Sustainability team returned to near pre-pandemic levels. Non-routine maintenance activities are identified through site inspections, meetings with site custodians and building administrators. 6300 annual work requests were submitted through our Asset Planner facility management software during 2020-21. By comparison, 5021 work requests were submitted in the prior year; 4476 in 2019-20, and 6527 submitted during 2018-19.

The COVID-19 pandemic heightened our awareness of the value of relationships and connection in every aspect of our work, including the team that maintains our property. The Facilities and Sustainability staff numbers 102 employees, caring for 28 buildings with 1.7 million square feet of building space and 280 acres of land. During the reporting period, Facilities and Sustainability professional development emphasized teamwork and key district initiatives with learning around inclusion and sustainability. This staff group is also very experienced, with many employees of long tenure and significant historical knowledge of district facilities and maintenance practices. Leadership worked to cross-train staff, build partnerships, and when hiring opportunities arose, look to deepen our expertise in new technologies. Three examples:

- When one of our Facilities and Sustainability supervisors retired after a nearly 30-year career in the district, he committed to overlapping and training his successor in the spring of 2022;
- A single Facilities and Sustainability administrative assistant is responsible for programming key fobs and setting & adjusting door schedules for buildings as we transition to electronic door access. To assist with the initial implementation of fobs our security supervisor and building automation technician both learned to program fobs.

- New buildings and upgraded features in older buildings have led to new maintenance needs. To meet this, we reclassified a plumber position, and now have two building automation technicians.

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 150 preventive maintenance measures were completed during the 2021-22 school year. The year previous we had more than 200 preventive maintenance measures reported in Asset Planner; in 2018-19, we reported 170. There are a few reasons for the variation: when we had fewer students in school, we had more time for preventive maintenance efforts; also, as new buildings open, like Alderwood and Parkview in 2021, preventive maintenance needs in those spaces decrease.

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
 & Sustainability, Transportation, Warehouse)

Facilities & Sustainability Staff:

Facilities & Sustainability Director	1
Supervisors	2
Custodial staff	77
Grounds staff	11
Maintenance staff:	
Carpenter	3
Plumber	3
Electrician	2
Painter	1
Building Automation Technician	2

Average time to complete work requests:

	Number of work requests	Percent work requests completed in 21-day timeframe
2021-2022	6300	92
2020-2021	5021	86
2019-2020	4476	98
2018-2019	6527	94

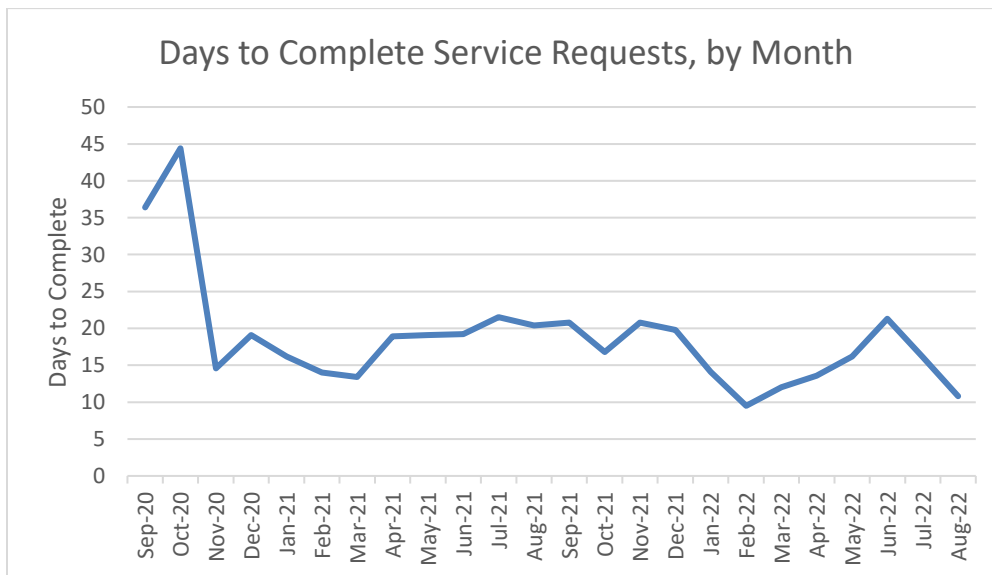
Work requests by level/facility:

	2021-2022	2020-2021
High school	1661	948
Middle school	1231	843
Elementary school	3025	2643
Support facilities	1034	680

Service requests by trade:

	2021-2022	2020-2021
Carpentry	1428	1166
Grounds	1505	1533
Electrical	525	432
Plumbing	654	522
Building Automation	179	114
Equipment Repair	219	169
Painting	279	183
Facilities admin requests: rentals, keying*	257	
Warehouse*	583	
Other	671	995

*2021-2022 was the first full year these specific requests were tracked in Asset Planner



Maintenance of Transportation Assets:

	Fleet Size	New in 2021-22	On Order	Electric vehicles	21-22 Surplus	22-23 Surplus
School buses	72	3	6	0	9	1
Non-bus vehicles:						
Passenger vans	26	0	0	0	0	0
Vehicles (Facilities & Sustainability; Education Technology)	47	2	0	3	15	5
Traffic Safety Education	9	2	0	2	0	0
Non-bus vehicle total	82	4	0	5	15	5

Our district vehicles are maintained by a 4-person team: our shop foreman and three mechanics. Repair costs remain low given our in-house service and ongoing efforts to add new vehicles to our fleet (requiring less repair overall). Last school year we began maintaining our non-school bus fleet as well as buses.

We continue to receive ‘excellence’ ratings in the bi-annual Washington State Patrol inspections and ‘100% Transportation Efficiency Ratings’ from the Office of Superintendent of Public Instruction, which drives our funding model. This shows continued success in maintaining our transportation related assets as well as being responsible stewards of public resources.

During the summer of 2022, the Transportation Office was remodeled, adding office and training space to the second floor; updating the restrooms and kitchen for all staff on the main floor; adding LED lighting; and upgrading security measures for the property.

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 & security team and the security service with whom we contract allows 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. Ensure that 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 & 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 Health Department (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' need are measured by our district part-time risk management specialist who monitors and assesses student, staff and visitor accidents; and coordinates associated claims activities. Staff accident reports are reviewed daily. Last year, 295 of 417 (71%) of staff accidents were student-related. This compares to 74% of staff accidents related to students 2018-19, our last full in-person school year.

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 Department 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. A LEF of 1.00 is average, meaning the frequency and severity of actual losses equals the expected losses for that classification of workers statewide. Our LEF in 2021-22 was 1.229; in 2020-21 we reported a LEF of 1.283.

When a staff member experiences an accident at work, the risk management specialist works with injured workers, attending physicians, as well as building and department supervisors to evaluate return to work options. In addition, the risk management specialist utilizes the Department of Labor and Industries Stay at Work Program to help pay some of the costs associated with light duty return to work. During 2021-22, there was one Stay at Work application filed and is pending reimbursement of approximately \$1775.

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

A key goal of the Sustainability Advisory Committee formed in 2021-22 is to develop a draft climate action plan with 5-year targets for conservation and resiliency in district facilities and operations. This 5-year plan will align with EL-9 reporting.

Key projects from the most recent bond issues:

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

Alderwood	2018	Complete
Parkview	2018	Complete
Sunnyland	2018	Continuing
Shuksan Gym	2018	Complete
ES 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:	2022	Continuing
Elementary school playgrounds		
KMS addition-- classrooms		
SQHS & Lowell ADA design additions		
Cordata parking improvements		
MS field improvements		

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

New elementary school <i>Includes energy-efficient heat pump system and HVAC system; increased natural light reduces need for artificial lighting.</i>	Sunnyland
Boiler replacement	Wade King
Hot water heater replacement	Cordata
Full window replacement	Squalicum
New HVAC controls	Wade King and Shuksan
New roof (Gym)	Fairhaven
New roof (Annex) & gym floor refinish	Silver Beach
Exterior paint	Kulshan
Gym retrofit—LED lights, floor refinish, new bleachers	Bellingham

Major safety initiatives during the reporting period include:

- Cameras installed in 22 schools and Transportation building.
- Electronic access control progress continues, with fobs in use for staff at our four high schools.
- Added four district-wide campus monitors to our safety/security team who are managed by our school safety supervisor.
- Professional development: all building leaders completed FEMA incident command training; safety has been a focus for leadership, with an emphasis on wearing badges at work; encouraging single door entrance/exit for staff; and limiting the number of doors open and unlocked on our campuses.

Technology infrastructure improvements completed during the reporting period include:

Digital Reader Boards	Coordinated work with Capital Projects & Communications to activate digital reader boards at several properties in Bellingham Public Schools (Alderwood, Parkview, Sunnyland; Bellingham, Cordata, Shuksan followed / in progress).
Security Camera Installations	Partnered with Capital Projects and Operations on the continued installation of camera systems at our school buildings to support student safety.
Intercom Systems	Modernization of intercom systems at Geneva Elementary.
Network System Upgrades	Firewall systems: Refresh of our District Firewall systems for higher security & improved performance. Core network upgrades: Improved wired network performance through an upgrade of our core network systems (Cisco 4500-series to Cisco 9600-series systems)
Document Management System	Selected and implemented a digital document management system (Laserfiche) Partnered with multiple District Office departments (Human Resources, Finance, Student) to migrate workflows to be 'born digital'; built automated processes to streamline core business functions in HR and Finance.
Communications Infrastructure	Partnered with Communications on the launch of ParentSquare, an updated / integrated communications platform. Coded integration systems for several key District products (RouteFinder Plus, FinalForms, Active Directory, Skyward) to create messaging groups and communities.

Transportation Systems	Partnered with Transportation to test & migrate to an updated / hosted version of our transportation & routing product, RouteFinder Plus.
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c. Inform the board of new, discontinued or material changes in district practice with respect to #1 above;

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; Affirmative.

The district is a member of the Schools Insurance Association of Washington (SIAW), a 36-member insurance consortium. The program allows members to jointly purchase insurance coverage and provide 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 2021-22, we filed eleven standard claims with our insurer compared to 5 the prior year. Eight claims were related to our vehicles totaling \$29,976; two claims were student related totaling \$150,611; and one claim is for a power surge at Alderwood Elementary, currently estimated at \$270,000. Subrogation with PSE may occur for the power surge claim at Alderwood.

- ii. Assessed energy usage and implemented resource conservation methods; Affirmative.

In 2021-22, our district introduced the Sustainability Task Force to recommend goals and next steps to address the climate crisis, including strategic planning to lead Bellingham Public Schools to an ongoing system of data collection and reporting to inform progress towards defined priorities. Current efforts completed, in progress and planned are documented in a timeline of BPS Operations and Facilities projects:

<https://bellingshamschools.org/wp-content/uploads/2022/10/Sustainability-timeline.pdf>

The Sustainability Task Force recommended ongoing work: a Sustainability Advisory Committee and three initial subcommittees addressing facilities and operations, teaching and learning, and habits and culture as priority areas of focus.

The current Sustainability Advisory Committee is developing a plan and timeline for benchmarking waste, water and energy usage within the district and individual buildings. In the spring of 2022, graduate students from the University of Washington worked with Bellingham High School Environmental Science Club students, BPS staff and community Sustainability Task Force members to pilot an energy use benchmarking study. The process informed our planning for building a framework to assess energy use and document outcomes of our resource conservation tactics; the pilot study at Bellingham High School is the basis of current energy use benchmarking district-wide, with data available in February 2023.

Utility costs provide a measure of energy use:

2021-22 total utility costs: \$2,886,994

2020-21 total utility costs: \$2,072,159

2018-19 total utility costs: \$2,299,919

Higher utility costs in 2021-22 are attributable both to cost increases and increased energy use. For example, many buildings had windows and doors open in 2021-22 to increase fresh air in buildings in response to COVID-19; this caused heating systems to work harder to maintain a consistent temperature.

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.**

This executive limitation is new this year; we will report on these two measures next year. Our planned structure for reporting will be:

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

	Benchmark data	Goals	Progress toward goal
Energy			
Water			
Waste			
Transportation			

HB 1257 requires Washington schools to use energy use intensity (EUI) as a measurement of portfolio performance. Further, Bellingham Public Schools intends to measure our greenhouse gas emissions and reduce that over time. We are currently

gathering EUI data for all schools and will be able to report a baseline by February 2023. This will allow us to set and report progress toward district-wide energy use goals.

The Sustainability Advisory Committee is developing a draft climate action plan, including targeted goals for energy, water, waste and transportation use.

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.

WSSP Scores	Final Score	Minimum Required	Maximum Possible
Happy Valley	51	45	119
Sehome	67	45	135
Alderwood	81	66	197
Parkview	69	66	197
Sunnyland	86	66	197

Our professional development to help us understand and define what an elevated standard of sustainability practices has begun, notably with a field trip in the summer of 2021 to two elementary schools and one environmental education center to see examples of sustainable design in practice.

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

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

EL-9 Data Set
Nov. 30, 2022

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 & Percent Facilities Admin Assistants - Keying, schedules, rentals	Number & Percent Warehouse
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%		

Energy Conservation Data			
Year	Elementary Green Classroom Certifications	Middle and High School Resource Conservation Workshops	Number of EPA Energy Star Schools
2021-22			22
2020-21			22
2019-20	39	25	22
2018-19	42	78	22

Risk Management Data					
Year	Number of Employee Injuries Reported	Number of Student-related Employee Injuries	Percent of Student Related Injuries	Loss Experience Factor	Stay at Work Refund Amount
2021-22	417	295	70.74%	1.229	pending 1 app
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

** 20-21 lower employee injuries due to Covid and fewer students at school and more employees working from home

Asset Preservation Program (APP) Scores						
School	APP Age	2017 APP Score	2018 APP Score	2019 APP Score	2020 APP Score	2021 APP Score
Bellingham HS	22	79.03	78.75	77.57	81.70	79.55
Squalicum HS	23	89.12	87.87	87.87	87.87	72
Kulshan MS (Main)	28	88.34	87.39	80.94	79.89	66
Kulshan MS (Gym)	28	89.81	89.01	80.94	80.94	66
Shuksan MS	13	95.23	91.78	91.78	94.21	85
Birchwood ES	8	98.84	98.84	98.27	98.27	91
Happy Valley ES	5	100.00	99.99	99.99	99.99	94