

MEMORANDUM

TO: Board of Directors

FROM: Dr. Greg Baker, Superintendent

DATE: December 11, 2025

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

I certify that the following is accurate as of Aug 31, 2025. The reporting period is from September 1, 2024 through August 31, 2025.

Policy Type: Executive Limitation

Policy: EL-9, Asset Maintenance and Protection

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, Transportation, Safety & Security, as well as Finance, 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

Overview of Facilities:

Size and Number: Bellingham Public Schools facilities include 14 elementary schools, four middle schools, four high schools, the Bellingham Family Partnership Program, the old and new district offices, Transportation, the Central Kitchen, Facilities and Sustainability, the Distribution Center, the environmental education property, and a building leased from WECU for the Community Transitions program. **These 30 facilities include approximately 1.8 MM square feet of building space over 280 acres.**

School year 2024-25 was a year of planning and preparation. We shifted our thinking about facilities maintenance and looked for ways to **proactively plan and fund facility maintenance**. Our Operations team first assessed the major building systems in each facility and then interviewed principals and building leaders for user input. Using this information about each building in the district, we then led a committee to evaluate and refine our assessment and made recommendations about a Capital levy. The committee recommended titling the levy effort our **Facilities Maintenance levy** as a funding strategy for proactive building maintenance. Ultimately, the work to assess needs in our buildings and the recommendation to seek levy funding allowed the Operations team to build a work plan prioritizing repairs over the 6-year life of the Facilities Maintenance levy.

We also continued to refine our **Facility Modification Request** process to plan for consistent implementation of building changes and improvements. Each month, a multi-disciplinary team review requests for changes to buildings. Requests vary widely; examples include the desire to add a mural and the need to add high-visibility contrast on school stairs so students and staff with vision disabilities can navigate buildings safely. A major effort of the year emerged as staff requested bathroom remodels to meet the needs of students; it became clear that each school needs ADA-accessible bathrooms with appropriate space and equipment. From these requests, we identified

a consistent need and then developed a standard for a “universal bathroom,” which includes a changing table and Hoyer lift in a private stall.

The Capital Projects team also led an important planning effort in applying for and being awarded **General Contractor/Construction Management (GC/CM) Agency status**. The team prepared a presentation of district construction planning and work to the Project Review Committee (PRC) of Facility Professional Services of the Washington State Department of Enterprise Services. As a result of the PRC expert review of BPS work, the district was awarded agency status allowing us to use the GC/CM model of construction management for projects over the next three years. Once awarded, the team interviewed and hired GC/CM contractors for **the Community Transitions (CT) construction** project and the construction of a **new Roosevelt elementary school**. In addition to Community Transitions and Roosevelt, Capital Projects continued to work closely with the City of Bellingham to determine whether it **might be possible to build a new Carl Cozier elementary on City of Bellingham property in the Civic Complex**. Another key effort from Capital Projects is the work with a contractor to **develop digital maps** of all district buildings and to complete the required **Study and Survey** of all our buildings, with data reported to OSPI. The Capital Projects team also led the installation of our biggest sustainability effort to date, with the **addition of solar arrays on five of our schools** in 2025.

A work group met over the winter to **review district facility rental practices**. The group recommended a continued commitment to public use of school facilities outside of school use, with a priority for programs serving children and youth. The work group also reviewed facility rental rates of comparable venues locally and across the state and recommended both an increase in rental rates and a simplified structure for rental rates. New rental rates and structure began on September 1, 2025.

The 30 buildings across district operations are cared for by a team of more than 95 Facilities and Sustainability staff. To respond to budget concerns across the district, we made changes to our staffing, including the elimination of the director of Facilities and Sustainability position in the spring of 2025 and one fewer grounds team position. As part of this reorganization, we shifted supervision of the Distribution Center from Facilities to the director of Transportation. As a result, we ended the school year with a team of 96: two Facilities and Sustainability supervisors (maintenance and custodial), two administrative assistants, 71 custodians, and 21 maintenance and grounds staff members. The 21 team members represent the following specialties and areas of trade expertise: stormwater, playground, grounds, equipment repair, carpentry, plumbing, refrigeration, HVAC, electrical, painting, and building automation technology.

The team continues to use Asset Planner to assign service requests to staff members. In addition to individual service requests, Asset Planner helps us manage preventive maintenance expectations, including annual boiler inspections and tuning, annual fire system inspections, regular stormwater preventive maintenance, annual programming of heating ventilation and air conditioning systems, motor lubrication, belt and pulley inspections and air filter changes. **Last year we assigned 6728 work requests, with an average time to completion of 33 days.** In past years' reports we've shared data about work requests by area of specialty (e.g, how many service requests were generated for plumbing needs, how many for electrical, etc); this year that information won't be included. Asset Planner is an excellent tool, and we are still refining how we use it; we aren't confident that every work request gets closed out at the completion of work, so the number of open work requests or time to completion may not be as instructive or accurate as we would like for this report.

Maintenance of Transportation Assets

	Fleet Size	2024-25 New	2024-25 On Order	Electric Vehicles	Propane Buses	2024-25 Surplus	2025-26 Projected Surplus
School buses	74	6	10	0	3	6	5
Non-bus vehicles							
Passenger vans & SUVs	25	0	0	0	0	0	0
Support vehicles *	53	0	0	3	0	0	0
Traffic Safety Education	9	0	0	2	0	0	0
Non-bus vehicle total	87			5		0	0
Total vehicles	161	6	10	5	3	6	5

**Food Services, Facilities & Sustainability, Educational Technology, Transportation, Distribution Center, Special Education*

Our shop is led by Mike Ingham, an ASE Certified Master School Bus Technician with 43 years of experience. Three mechanics, with a combined 62 years of experience, are also on the team. The shop services all buses and the motor pool. They have received the Certificate of Achievement for Outstanding Bus Inspections for at least the last 14 years.

Protecting District Property:

District property is protected with our physical security measures, as defined in our Safety and Security district standards. Physical security measures include security cameras, both keyed and electronic access control, fencing, intercoms, and 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.

Facility Maintenance

The Facilities & Sustainability team uses the Asset Planner system to track and manage maintenance needs. Observations and inspections are conducted by district staff, including the Chief Operating Officer, Operations Specialist, and supervisors of Facilities and Sustainability, custodians and groundskeepers. Principals and building occupants provide valuable facility condition information to the 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. Individual systems are evaluated and rated; ratings are combined to form an overall score on a 100 point scale. A higher score suggests a newer, well-maintained facility; lower scores may indicate aging components. The Office of Superintendent of Public Instruction (OSPI) prescribes the Building Condition combined APP scores for facilities based on their age. Scores are reported below.

School	APP Age	2024-25 APP Score
Kulshan MS (Main)	30	76.68
Kulshan MS (Gym)	30	72.51
Bellingham HS	25	74.16
Squalicum HS	24	80.74
Shuksan MS	15	80.22
Birchwood ES	10	89.52
Happy Valley ES	7	87.55
Sehome HS	4	91.09
Alderwood ES	2	98.82
Parkview ES	2	99.39
Sunnyland ES	1	99.39

Facility Safety

Safety Standards: In 2024-25, continued work to develop and implement BPS safety standards was led by Russ Robinson, our Director of Safety and Security. Russ led a committee to articulate our district standards for safety and security and develop a road map for bringing all facilities to that standard.

The safety and security vision and mission statement recommended by the committee reads: Bellingham Public Schools prioritizes the safety and well-being of our students, staff, visitors, and the community. We foster a culture of safety and preparedness within our school environments by implementing proactive safety practices; planning for and maintaining physical security; and cultivating a culture of care and belonging. These combined strategies support a safe and secure environment where learning can flourish and students feel cared for, healthy and safe.

Facility Safety & Responsiveness to Users' Needs

One way we measure facility safety and responsiveness to users' needs is by monitoring and assessing student, staff and visitor accidents and associated insurance claim activity. Staff accident reports are reviewed daily. Oversight and management of risk related to these accidents has been incorporated into the job duties of the human resource department.

In 2024-25, we filed 21 standard claims with our insurer compared to 26 in the prior year. Seventeen claims were related to our vehicles, totaling \$61,883. Two claims were student related and have closed with no payments made. The largest claim in the previous year related to water damage at the old district office and several school buildings, resulting in \$3.9 million for damages.

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 2024-2025 was 2.0298; in 2023-2024 we reported a LEF of 1.640.

When a staff member experiences an accident at work, a human resources specialist works with the injured worker, healthcare providers and building and department supervisors to evaluate return to work options. In addition, the human resources program 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.

Environmental health and safety measures in 2025-26:

- Effective in 2021, Washington state law requires drinking water in all K-12 public schools built or with all plumbing replaced before 2016 be tested for lead. The purpose of **lead testing** is to identify drinking water outlets that are potential sources of lead exposure. Health services, Operations, Facilities & Sustainability staff and Special Projects Manager & Grant Writer Amelia Vader worked together in **2024-25 to complete water fixture assessments and mitigation steps** for compliance with this law. As part of our efforts, we secured private funding for water bottle filling stations in schools to increase access to drinking water. Up-to-date test results and action plans can be found on our district webpage: <https://bellingshamschools.org/families/health-services/lead/>.
- In 2023, we began implementing a **Wildfire Smoke Preparedness in Community Buildings** project, funded from a grant from the United States Environmental Protection Agency, allowing us to install air quality monitors inside and outside each school building. In school year 2024-25, Health Services, Facilities & Sustainability, Education Technology, and Special Projects Manager & Grant Writer Gretchen Pflueger **completed the installation of monitors**. We also drafted a Wildfire Response Plan, which guides us to install filters that capture more air particles during wildfire season and then change filters out to a lower level of particulate-filtration to allow for air circulation systems to operate more efficiently during periods with less risk to human health from wildfire smoke.

Facility Cleanliness

We are proud and grateful for the work of the 71 members of our **custodial staff** responsible for maintaining cleanliness across facilities. Custodians often serve as hosts of our buildings, working closely with principals or building directors to ensure buildings are clean and ready for each school day in addition to the many activities in our buildings beyond the school day.

In 2024-25, the custodial team introduced a new paper and cleaning product vendor, Waxie, to allow use of products formulated to reduce potential impacts on human health as well as the environment. Waxie impacts our carbon footprint through consolidation of orders and intentional purchasing, reducing associated transportation costs for small and special orders. We continue to use our purchasing power to find partners in climate action.

Our custodian supervisor's focus is to build a strong and positive workplace culture for our dedicated custodians. The custodians worked together to articulate the shared values at the core of custodial work: respect, trust, communication, good intent and support.

Facilities Conducive to Teaching and Learning & Responsive to Users' Needs

We engage facilities stakeholders, especially users of our facilities, to be responsive to the needs of our community and ensure facilities are conducive to teaching and learning. A few examples include:

- **Facility Modification Request system:** In 2024-25, we continued to develop our district-wide system to evaluate requests to make modifications to buildings. A multi-disciplinary team from Facilities and Sustainability, Capital Projects, Special Education, Safety & Security and Finance met monthly to review requests and recommend next steps.
- **Capital Projects Educational Specification committees:** Stakeholders meet frequently in the planning phases of projects. In 2024-25, the Capital Projects team convened educational specification committees for Community Transitions, Roosevelt Elementary, and Carl Cozier Elementary building projects, as well as a committee to recommend improvements to Lowell Elementary.
- **Community engagement in best practices and developing building standards:** Efforts like the Sustainability Advisory Committee help our district staff stay informed of best practices and new opportunities for learning environments; collaborations can inform updated standards for new and remodeled buildings. In 2024-25 the Operations team led a process to review major building systems in each building, interview building leaders to learn about the users' experience, and convened a committee to evaluate the option of asking voters to support a proactive facility maintenance funding effort.

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

In compliance.

Five-Year Plan for Managing, Developing, and Improving Facilities

- **Bond Issues:** 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
- **Plans & data sources informing facilities conditions & plans:** In addition to planning and projects associated with bonds and voter measures, our district has an iterative history and system of reports:
 - Study & Survey, includes a Building Condition Assessment for all buildings (2014, 2018, 2025)
 - Facility Master Plan (2016, planned for 25-26)
 - Capital Facilities Plan (2019, scheduled for 2026)
 - Facilities Planning Taskforce Recommendations (2021)
 - Facility Maintenance Levy Recommendations (2025)
- Key projects as defined from the most recent bond issues that were either completed or continuing in school year 2024-25 include:

Project	Bond issues	2024-25 status
Environmental Education Site	2013 & 2022	Continuing
Elementary School Fields	2018	Continuing
Safety Upgrades	2013, 2018, 2022	Continuing
Community Transitions Facility	2022	Continuing
15 th Elementary School—shifted to Carl Cozier Elementary	2022	Continuing
Planning for Roosevelt, Cozier, Columbia rebuilds	2022	Continuing
Safety, sustainability, accessibility—projects include: • Elementary school playgrounds • SQHS & Lowell ADA & exterior design additions	2013, 2018, 2022	Continuing

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 10 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 2024-25, we filed 21 standard claims with our insurer compared to 26 in the prior year. Seventeen claims were related to our vehicles, totaling \$61,883. Two claims were student-related and have closed with no payments. The largest claim in the previous year related to water damage at the old district office and several school buildings, resulting in a \$3.9 million payment.

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 a dashboard was published on our district webpage in 2024.

Utility costs provide a measure of energy use:

2024-25 total utility costs: \$3,971,934

2023-24 total utility costs: \$3,552,730

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

A tactical goal of our Climate Action Plan is to “perform cost/benefit and opportunity cost analyses.” We have identified energy efficiency, water use, and waste as target areas to develop indicators, measures, and strategies to address. To that end, utility spending in these areas in 2024-25 is reported below:

	2024-25	2023-24
Electricity	\$1,751,849	\$1,748,509
Garbage & Recycling	\$361,664	\$351,631
Natural Gas	\$700,778	\$594,508
Water	\$836,135	\$833,920

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.

In compliance.

The Climate Action Plan (CAP) sets district goals to reduce environmental impacts in the areas of energy, water, waste, and transportation. The CAP establishes an overarching goal for the district: by 2028, BPS will develop a process to continually and systematically reduce environmental impacts and improve health and resiliency by balancing human, environmental and economic priorities.

The Sustainability Advisory Committee met two times in 2024-25 to help support district accountability toward the tactical goals in the CAP.

Tactical goals & evidence of progress toward goals:

Energy

Goal: By 2025, BPS will use a mechanism to guide decision making related to energy use in new and existing facilities. We will balance the following considerations: cost-effectiveness; energy efficiency; greenhouse gas emissions; health of the stakeholders; full life cycle of materials.

- In the summer of 2025, BPS installed solar arrays on five school buildings: Happy Valley, Alderwood, Sunnyland, Options, Shuksan. This effort was funded by a \$2.7 million Community Decarbonization grant through the Department of Commerce.
- The Energy Use Intensity and Carbon Benchmarking Dashboard, published on the district website in 2024, is evidence of progress toward energy goals and an important component of our work to be compliant with HB 1257, the Washington State Clean Building Bill.
<https://bellingshamschools.org/sustainability/facilities-and-operations/>
- In spring 2025, we contracted with outside energy auditors to assess 10 school buildings for energy use and targets and provide recommended improvements to comply with HB 1257.
- In 2025 we developed our Facilities Maintenance Levy recommendations beginning a 6-year cycle of preventive maintenance and planned upgrades to building systems. This includes plans for energy efficient efforts like systematically upgrading buildings to LED lights.
- In the fall of 2025, we secured a \$155,000 Puget Sound Energy custom energy efficiency grant for our new administration building, designed with high-performance systems that go beyond code requirements. Features like advanced heating and cooling with heat recovery, efficient ventilation, smart lighting controls, and solar-ready infrastructure will save approximately 345,000 kWh annually, reducing operating costs and reinforcing our commitment to sustainability.

Water

Goal: By 2025, BPS will develop a water management plan to become a responsible water school district.

- Our key focus toward our water management plan in 2024-25 was district-wide compliance with the Department of Health Lead-Free Kids Initiative. By completing the assessment and mitigation cycle of drinking water fixtures in our

schools, we were able to identify dedicated drinking water fixtures and add water bottle filling stations in many schools.

- One example of progress toward being a responsible water school district was our stormwater specialist's collaboration with Bellingham High School students to add water-filtrating plants to the bioswale outside BHS.

Waste

Goal: By 2026, BPS will reduce production of waste by implementing uniform waste systems and receptacles in cafeterias, classrooms, and other spaces throughout school buildings.

- RE-Sources received Department of Ecology funding that led to waste assessments in our schools, with recommendations offered by the Waste Education Specialist to both the custodial and the food services team. Three actions arose from the assessment and recommendations:
 - In spring 2025 RE-Sources supported Alderwood Elementary in developing education materials for classroom waste—teaching kids about recycling and garbage. The district will adapt these materials in 2025-26 for use across the district.
 - The RE-Sources grant led to an opportunity with Sanitary Services Company to donate uniform recycling receptacles for all schools. The custodial team will plan installation and implementation in 2025-26.
 - In summer 2025 our RE-Sources community partners joined the annual custodial professional development meeting and shared the results and recommendations of the assessment they performed.

Transportation

Goal: The Climate Action Plan commits us to performing cost/benefit and opportunity cost analyses of our Facilities and Operations systems. In Transportation, our district reviews opportunities for more efficient vehicles regularly.

- In spring 2025, our Transportation team received delivery of three new propane-fueled school buses. Current research leads us to expect that our propane buses will be 90% cleaner than the strictest EPA federal emissions standard.
- The Transportation team continually reviews routes and ridership, adding routes, buses and destinations in 2024-25 to continue our work to make school buses more convenient and attractive to students. An overarching goal is to increase active transportation and decrease individual car trips in our community.

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

Projects in 2024-25 were primarily in the planning phase, with sustainable practices considered at each step in the process. BPS goals for all new buildings include exceeding international building code (IBC), state building code (WSSP) and city of Bellingham code requirements. Planning committees for the new Community Transitions building, Roosevelt Elementary and Carl Cozier Elementary all included sustainability considerations as a core value, leading to evaluation for elements such as solar arrays, energy efficient heating and cooling, EV charging stations, and highly traceable building materials.

Additionally, our Climate Action Plan goals have driven us to stay engaged with novel funding opportunities to support sustainable building. Washington State Department of Commerce funding allowed us to assess for and then install solar arrays in five schools in 2025; the success of that project led us to assess other buildings for solar to be prepared to seek additional funding when available.