

Bond Performance Audit Recommendation Implementation Plan

Bond Performance Audit Recommendations				Implementation Plan	
Year Report Issued - Recommendation Number / Bond Program / Audit Year	Abbreviated Recommendation	Response	Responsible Administrator / Manager	Implementation Plan (Specific steps to be implemented)	Anticipated date implementation will be complete (generally expected within 6 months)
2019 P2 - #7 2017 Bond Year 2018-2019	Formally communicate, clarify and train OSM project teams and individuals involved with project delivery on existing document management protocols including requirements and expectations for usage.	Concur	Stormy Shanks, Sr. Director, School Modernization	<ul style="list-style-type: none"> - Distribute PPS computers to contracted staff and require that all PPS work be performed on PPS devices using PPS document management systems (complete) - Gather list of common documents generated during OSM projects (complete) - Develop folder structures in eBuilder, X: drive, and Google Drive, and determine standard locations for all common documents (complete) - Develop template folder with standard sub-folder structure that can be copied for new projects - Develop training materials and deliver training to OSM staff and contractors - Define process for continuous improvements and updates 	February 2025
2020 - #7 2017 Bond Year 2019-2020	Conduct a post-project completion analysis for the Madison and Lincoln High School projects to evaluate benefits and challenges of the CM/GC delivery method overall, as well as specific aspects such as timing of Guaranteed Maximum Price (GMP) contract amendments, and make process changes as warranted. The evaluation should consider components suggested by ORS279.103 and provide a comparison of actual project cost against original project estimates, change order number, value and type, as well as descriptions of success and failures during design and construction.	Concur with Comment	Stormy Shanks, Sr. Director, School Modernization	<ul style="list-style-type: none"> - Gather examples of ORS 279C.355 compliant post-project evaluations for CM/GC projects completed by other contracting agencies (complete) - Develop post-project evaluation template for CM/GC projects - Gather "Findings in Support of Alternative Contracting Methodology" documents for Lincoln and McDaniel (Formerly Madison) - Gather applicable data from eBuilder - Analyze data, write narratives, and assemble reports - Deliver reports to the Contract Review Board <p><i>Note: The ORS section that describes post project evaluations and is referenced in PPS contracting rules is ORS 279C.355, not ORS 279.103.</i></p>	February 2025
2021 - #1 2017 Bond Year 2020-2021	The PPS Board should revisit its Equity in Public Purchasing and Contracting ("EPPC") Policy to clarify and define the District's vision, goals, and commitment to business equity. This should include reassessing the overall intent, determining how equity is characterized, and expanding on what attainment of business equity goals for the District should entail.	Concur with Comment	Stormy Shanks, Sr. Director, School Modernization	<ul style="list-style-type: none"> - Identify responsible administrator / manager for liaising with the Board's Policy Committee Policy - OSM collaborate with Policy Committee Staff Liaison to develop proposed workplan and inputs into Board Policy Committee consideration of this recommendation 	

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2021 - #2 2017 Bond Year 2020-2021	Further develop the Board’s overarching vision into more succinct measurable subgoals or objectives, support new goal setting defensible data, and define qualitative and quantitative metrics to measure against new goals.	Concur	Stormy Shanks, Sr. Director, School Modernization	<ul style="list-style-type: none"> - Recommendation #1 is implemented as a prerequisite to implementing recommendation #2 - Staff identify new potential focus areas in reporting on EPPC goals and develop new reports and reporting processes 	
2021 - #3 2017 Bond Year 2020-2021	Conduct a cost-benefit analysis of available business equity strategies, such as those outlined in this report, and include considerations such as long-term versus short-term strategies, direct versus intangible “investment” type strategies, and unintended consequences.	Concur	Stormy Shanks, Sr. Director, School Modernization	<ul style="list-style-type: none"> - Create a central, living document in OSM in which to analyze cost/benefit of business equity strategies (complete) - Assemble list of available business equity strategies (complete) - Calculate/narrate quantitative and qualitative costs and benefits of available strategies (complete) - In EPPC Annual Reporting SOP, add requirement to analyze cost-benefit of new business equity strategies under consideration, publish SOP 	January 2025
2021 - #4 2017 Bond Year 2020-2021	Develop tools and protocols to capture outcomes of chosen equity strategies, and validate outcome data accuracy.	Concur with Comment	Stormy Shanks, Sr. Director, School Modernization	<ul style="list-style-type: none"> - Create a central, living document to capture outcomes of chosen equity strategies alongside cost/benefit analysis (complete) - Define what outcomes will be measured and measurement methods for chosen strategies - Define roles and responsibilities for measuring and documenting outcomes 	March 2025
2021 - #5 2017 Bond Year 2020-2021	Create protocols to expand on existing business equity annual reporting to include an assessment of whether annual equity outcomes realized meet the intent of the EPPC Policy and goals of the Administrative Directive, or if modification to the portfolio of equity strategies is warranted, and based on results, adjust strategies as necessary.	Concur	Stormy Shanks, Sr. Director, School Modernization	<ul style="list-style-type: none"> - Develop Standard Operating Procedure (SOP) for an annual review and reporting of business equity strategies. Reporting to include assessment of strategies in place during the previous year, potential changes or new strategies, cost-benefit analyses for use in selection of the strategies in the upcoming year, and outcome data over the course of the year. Publish SOP. - Develop annual report template to encourage consistency across annual reports 	March 2025
2022 - #1 2017 / 2020 Bond Year 2021-2022	Complete development of and memorialize policies, procedures, and e-Builder processes related to construction closeout as well as train project staff on new closeout protocols before the remaining 2017 Bond projects are completed.	Concur with comment	Stormy Shanks, Sr. Director, School Modernization	<ul style="list-style-type: none"> - Gather requirements and design project closeout workflow, step actors, required documents (complete) - Develop document templates (complete) - Develop eBuilder project closeout process (complete) - Develop training materials, conduct training with staff - Identify pilot projects and execute pilot - Make adjustments following pilot project - Go live with project closeout process for all projects 	February 2025

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2022 - #2 2017 / 2020 Bond Year 2021-2022	Develop protocols for regularly identifying, reviewing and assessing workforce equity strategies on a designated timeline.	Concur	Stormy Shanks, Sr. Director, School Modernization	Integrate an annual review of workforce equity strategies into the broader annual report developed in response to the 2021 Audit Recommendation #5.	March 2025
2022 - #3 2017 / 2020 Bond Year 2021-2022	Clarify the Workforce Equity Administrative Directive protocols for whether workforce equity outcomes and progress should be measured and reported in aggregate or disaggregated by each apprenticeable trade.	Concur	Stormy Shanks, Sr. Director, School Modernization	<ul style="list-style-type: none"> - Review the existing Workforce Equity AD and history of staff memos that led up to it to understand more about the original intent of the AD - Analyze the value of different methodologies in reporting workforce equity outcomes and make decisions about how to report going forward - Update reporting templates and publishing methods if justified 	March 2025
2022 - #4 2017 / 2020 Bond Year 2021-2022	Conduct a review of workforce equity program specifications and analyze whether existing rules could be enhanced to benefit intended target audiences.	Concur	Stormy Shanks, Sr. Director, School Modernization	<ul style="list-style-type: none"> - Thoroughly review and understand the City of Portland's workforce equity program specifications and rules (PPS contracts with the City to administer the workforce equity program compliance according to their pre-existing program specifications and rules) - Determine whether there's value in customizing the rules for PPS to better align with PPS workforce equity goals. 	May 2025
2022 - #5 2017 / 2020 Bond Year 2021-2022	Continue in-progress efforts to revisit the types of key performance indicators it should track and report on that best align with PPS overall objectives and Bond project objectives.	Concur	Stormy Shanks, Sr. Director, School Modernization	<ul style="list-style-type: none"> - Develop KPIs that are meaningful, measurable with existing data, and aligned with Bond project objectives - Develop standard templates for reporting KPIs - Develop eBuilder Reports and spreadsheet tools for automating KPI reporting where possible - Assign roles, responsibilities, and expectations around KPIs - Define audience, publishing method, and reporting frequency as well as set frequency of evaluating the usefulness/value of KPIs 	April 2025
2022 - #6 2017 / 2020 Bond Year 2021-2022	Require general contractors to consistently report specific safety performance data to OSM.	Concur	Stormy Shanks, Sr. Director, School Modernization	<ul style="list-style-type: none"> - Update the Project Status Update process in eBuilder to add required safety performance data fields (complete) - Develop and deliver training to project management staff - Update contracts to require contractors to report on standard safety metrics 	February 2025
2022 - #7 2020 Bond Year 2021-2022	Establish a formal framework for CBSE management and staffing with clear roles and responsibilities with defined authority and accountability.	Concur	Toye Watson, Director, CBSE	The CBSE has established a comprehensive framework, encompassing clear roles, responsibilities, authorities, and accountabilities for PPS departments, aligning with Audit Recommendation 7.	November 2024

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2022 - #8 2020 Bond Year 2021-2022	Update existing CBSE implementation schedule with realistic dates, interim milestones or progress targets, general tasks and activities, and plans to get CBSE back on track.	Concur with comment	Toye Watson, Director, CBSE	The CBSE has developed a revised implementation schedule, incorporating realistic timelines, interim milestones, and specific tasks to ensure timely progress, aligning with Audit Recommendation 8. This revised schedule is currently pending approval from Deborah Kafoury and other senior staff.	September 2025
2022 - #9 2020 Bond Year 2021-2022	Work with key PPS departments to put a general CBSE implementation plan in place and ensure a quick start for capital purchases or capital building as soon as CBSE concepts and goals are solidified.	Concur	Stormy Shanks, Sr. Director, School Modernization	<ul style="list-style-type: none"> - OSM to develop workplans, schedules, and conceptual cost opinions for three options for development of the CBSE facility. Options will address constructing on existing PPS property and adapting or constructing on newly acquired property. - The analysis of the options will be provided to CBSE leadership for decision-making. - When a decision is made, Planning and Real Estate and OSM will execute existing processes to acquire property and/or construct facilities while collaborating with internal and external stakeholders. 	February 2025
2022 - #10 2020 Bond Year 2021-2022	Create CBSE project management plans and structure to identify general tasks and monitoring mechanisms to set, track, and report on baseline and revised schedules, original and revised budgets, and progress toward meeting delivery goals.	Concur with comment	Toye Watson, Director, CBSE	The CBSE has developed a robust project management plan to track and monitor project progress, including baseline and revised schedules, budgets, and delivery goals, aligning with Audit Recommendation 10. This plan is currently pending approval from Deborah Kafoury and other senior staff.	December 2025
2023 - #1 2020 Bond Year 2022-2023	Research and assign resources needed to implement a structured Career Learning Equity Program that has clearly designated roles and responsibilities, protocols for coordination, contractor and consultant management, data management and reporting, and set targets to track outcomes.	Concur with comment	Stormy Shanks, Sr. Director, School Modernization	<ul style="list-style-type: none"> - Develop clear processes for contractors to coordinate with OSM at contract execution - the supply side of career opportunities (complete) - Update procurement and contract documents to define the required career learning processes for contractors (complete) - Work in collaboration with Academic Programs/CTE to develop a standard process for connecting CTE teachers and staff (demand side of career learning) with the opportunities offered by contractors for career learning (supply side of career learning). - Identify responsible administrator / manager in Teaching and Learning organization to manage the demand side of career learning program. - Develop tools for managing data and measuring contractor compliance, and outcome metrics around career learning events delivered 	April 2025

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2023 - #2 2020 Bond Year 2022-2023	Alternatively, PPS should revise the Administrative Directive to limit the scope of the Career Learning Program to align with the district's capacity more appropriately.	Concur with comment	Emily Courtnage, Director, Purchasing and Contracting	Update the Administrative Directive: - Remove reference to "Partner Connect" system no longer in use by PPS (complete) - Raise the dollar thresholds at which the AD applies to focus on larger, longer term contracts (complete) - Exclude small dollar, short-term contracts – often completed over the summer when school buildings are empty – where it has been difficult to obtain any meaningful student involvement (complete) <i>The AD revision has been drafted, approved by legal, and is at the Superintendent Review step before publishing.</i>	January 2025