



# AGENDA

FEB. 16, 2024 | SALEM CONVENTION CENTER

## 7:30 A.M. | REGISTRATION AND BREAKFAST GALLERY FOYER

## 8:15 A.M. | GENERAL SESSION SANTIAM BALLROOM

### Welcome and Opening Remarks

Sami Al-Abdrabbuh, OSBA president

### Learn From the Winners Panel/Q&A

#### FOREST GROVE SCHOOL DISTRICT

David Warner, communications director  
Voters approved a \$121 million bond measure in November 2022 and the district received a \$6.7 million OSCIM grant. Bond projects include replacing an elementary school, repairing and updating schools, adding secure entrances, alarms and cameras, providing one pre-K classroom at every elementary school, making technology upgrades and expanding career and technical education spaces.

#### CRESWELL SCHOOL DISTRICT

Mike Johnson, superintendent;  
Lacey Risdal, board member  
Voters passed an \$18.2 million bond in May 2023 with nearly 70% "yes" votes and the district received a \$4 million OSCIM grant. Bond projects include repairing and updating schools, adding Career and Technical Education classrooms, establishing a school-based health center and adding secured entry points and other safety and security improvements.

#### ROGUE RIVER SCHOOL DISTRICT

Patrick Lee, superintendent;  
Mysti Jacobs, board member  
Voters passed a \$4.5 million bond in May 2023 after an earlier defeat and the district received a \$4 million OSCIM grant. The bond replaced one that expired in June. Bond projects include updating the plumbing and electrical throughout the district, adding an annex for middle school students and providing single points of entry at the elementary school along with other safety upgrades.

## 9:30 A.M. | BREAK GALLERY FOYER

## 9:45 A.M. | WORKSHOPS

### New Construction World – Understanding the Big Shifts for School Projects

Industry impacts from COVID are here to stay for the foreseeable future. These changes in budgeting, scheduling, procurement and even product standards can all be overcome but require more comprehensive pre-bond planning and innovative approaches to material and trade procurement. This workshop will analyze current challenges and explore the options available to school districts from the perspective of project managers, builders and cost estimators. Scott Rose, senior project manager, R&C Management; Adam Cormack, co-partner, R&C Management; Corey Lohman, president, Emerick Construction; Seth Pszczolkowski, principal, ACC Cost Consultants  
*Santiam 4*

### Design-Build and CM/GC: Is an Alternative Delivery Method a Good Fit for Your District?

The choice of construction delivery method is one of a school district's most significant decisions during a capital bond program. Learn about the difference between design-bid-build, construction manager/general contractor (CM/GC), and design-build methods in Oregon, and how they best fit with a district's priorities, project needs, and risk tolerance. We will provide an overview of each delivery method, with a focus on key procurement and contractual strategies. Chris Walters, partner, Dunn Carney; Cassie Hibbert, senior project manager, Wenaha Group; David McKay, CEO, HMK Company  
*Santiam 5*

### Fundamentals of Bonds

Bonds can be complicated. There are lots of layers to know, not to mention many rules that require compliance from issuers. We will walk through the basic concepts so you can feel more comfortable talking about bonds as you navigate the approval and issuance process. Lauren MacMillan, managing director, Piper Sandler; Gulgun Ugur, partner, Hawkins Delafield & Wood LLP; Leah Bibeau, finance director, Bend-La Pine Schools  
*Santiam 6*

## 11:30 A.M. | LUNCH SANTIAM BALLROOM

### **Pulling Back the Curtain on Polling: Myths and Facts About Public Opinion Research**

Your parents are a captive audience. But voters without kids in your schools (the majority of your electorate) typically have no idea what's going on behind your walls. Good polling is vital for understanding the entirety of your community and a bedrock component of winning bond or levy campaigns. But what is polling really? How does it work? How can you tell a good poll from a bad one? And why do I always hear "the polls are wrong?" Join two veteran campaign strategists as we pull back the curtain on the process, talk about best practices, and how you can use polling to win your next campaign.

Jeremy Wright, principal, Wright Public Affairs; Ben Patinkin, founder and president, Patinkin Research Strategies

## 12:45 P.M. | WORKSHOPS

### **Engaging partnerships and community to successfully manage your bond**

North Clackamas School District will share how it successfully managed a bond of more than \$500 million through a strategic bond program and project management plan. You will hear how they engaged the community, developed partnerships, and used strategic communication before, during, and after the bond to maintain and build trust and strong relationships with their community. Cindy Detchon, assistant superintendent, North Clackamas SD; Shaun Stuhldryer, program manager, Turner & Townsend Heery  
*Santiam 4*

### **Additional Revenue for Your Bond Program**

We will discuss how including energy programs in your early planning and design can maximize your incentives and bring in additional revenue to support your bond program. The panel will feature experiences and data from the Corvallis School District's \$260 million bond program, as well as other examples. Patrick Linhart, project manager, Wenaha Group; Christina Skellenger, energy advisor, Energy Trust of Oregon; Kim Patten, director of facilities and transportation, Corvallis SD  
*Santiam 5*

### **Defining Your Message: The Importance of Communications to Bond Success**

A clear, concise, compelling message is key to passing a bond measure. But once you develop your message, how do you best deliver it to your stakeholders? This workshop will feature three communications specialists who will share the strategies they used for engaging with voters and communicating the key messages of their successful bond measures. Stacey Mendoza, director of communications, St. Helens SD; David Warner, director of communications, Forest Grove SD; Shellie Bailey-Shah, public communications officer, Beaverton SD  
*Santiam 6*

## 2 P.M. | BREAK GALLERY FOYER

## 2:15 P.M. | WORKSHOPS

### **Redesigning the Process: Transforming Facilities and Culture through Equity Commissioning**

Community engagement throughout bond planning helps ensure that underrepresented communities feel seen. We will explore project-based case studies that illustrate how architects, planners, and facilitators have partnered with Oregon schools to develop equitable and inclusive community engagement strategies that build trust. Participants will show how these insights can support equity commissioning, an approach to facility planning and design characterized by culturally responsive practices and accountability. Octavio Gutierrez, senior designer, BRIC Architecture; Allison Brown, planner, BRIC Architecture; Joe Morelock, superintendent, Willamette ESD  
*Santiam 4*

### **Intro to ODE's Statewide Facility Assessment and the OSCIM Program**

This workshop will explain what the Statewide Facility Assessment will be, what districts will get from the assessment, and how this information can help them with their pre-bond work and comply with OSCIM Program requirements. Adam Krein, statewide facility assessment director, Oregon Department of Education; Michael Elliott, school facilities program manager, ODE  
*Santiam 5*

### **All In: The Sherwood Levy Success Story**

In May 2023, 58% of Sherwood voters approved a local option levy at \$1.50/\$1,000. Remarkably, 50% of Sherwood voters voted in the election (when statewide turnout was in the low 20s), and initial community polling was extremely unfavorable. We will describe key elements of the strategies used by both the school district and the political action committee to drive high voter turnout and successful messaging. This detailed blueprint for success may put your campaign over the top. Jeremy Lyon, superintendent, Sherwood SD; Abby Hawkins, chair, Sherwood School Board; Jessica Adamson, member, Sherwood School Board; Gary Bennett, chief financial officer, Sherwood SD; Carol Samuels, managing director, Piper Sandler  
*Santiam 6*

## 3:30 P.M. | ADJOURN