



Oregon

Tina Kotek, Governor

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MEMORANDUM

To: Chris Stewart, Director of Facilities and Support Operations, Oregon State Hospital (OSH)
From: Bill Foster, Chair, Capital Planning Advisory Board (CPAB/Board)
Date: August 20, 2024
Subject: OSH's 2025-27 Agency Facilities Plan Acceptance

Chris,

The Capital Projects Advisory Board (CPAB/Board) has reviewed OSH's 2025-27 facilities plan in accordance with ORS 276.227. Following your Board presentation on August 9th, the Board has **accepted** your plan with the following comments:

- *CPAB appreciates your thorough presentation and recognizes the challenge ahead for developing a comprehensive capital plan for OSH.*

Sincerely,

Bill Foster, Chair

Capital Projects Advisory Board (CPAB)



July 26, 2024

RE: Oregon Health Authority - Oregon State Hospital - 2025-27 Biennial CPAB Memo

Board Chair Foster:

The Oregon State Hospital (OSH) is pleased to present to you its proposed facilities plan for the 2025-27 biennium. This plan supports the facilities in Salem, Junction City, and Pendleton; with a combined area of 1.22M ft², and a combined estimated current replacement value (CRV) of \$685M.

The Peter Courtney Salem Campus consists of 960K ft² of buildings and interior secure perimeter courtyards, and 23 cottages with a CRV of \$495M. The Junction City campus is 230K ft² with a CRV of \$180M. Finally, the Pendleton facility consists of several older buildings with a total combined area of 39K ft², and a current replacement value of \$10M.

OSH strives to achieve the highest standards and outcomes in all aspects of its work. Engaged stewardship of the public trust and public resources includes maintaining OSH's facilities portfolio to the highest standards and investing in regulatory and infrastructure improvements to meet the constantly evolving needs of patients and staff. OSH serves one of the most marginalized populations, Oregonians experiencing mental illness. Maintaining well-kept, safe, and functional treatment environments for Oregonians in need supports OHA's strategic plan to eliminate health inequities by ensuring that all people and communities can achieve optimum physical, mental, and social well-being through partnerships, prevention, and access to quality and affordable health care.

OSH is at a crossroads where its facilities have reached an age where a robust long-term investment strategy is needed to ensure that it can effectively meet OHA's strategic plan to support all Oregonians in need of mental health treatment. For over a decade OSH has had a comprehensive preventative maintenance program and adequate budgetary funding for routine preventative maintenance and capital improvement investments since its two flagship facilities in Salem and Junction city were newly built and brought online in 2011 and 2013, respectively.

With their heavy use as a 24/7 secure mental health services operation, the buildings have reached a point where the lifecycle of many of its building systems have reached a point where capital improvement and capital construction investments are becoming a priority, and deferred maintenance is progressively becoming a consistent challenge. The remaining structures, including the 23 cottages in Salem and the facilities in Pendleton, are much older and more maintenance intensive.

OSH utilizes a computerized maintenance management system to manage all facilities work order requests at its Salem and Junction campuses. OSH has a dedicated team of maintenance staff, varying across many different trades, with most asset PMs routinely performed by in-house trades staff or contractors. This team is also responsible for the management and maintenance of medical equipment.

OSH plans to partner with DAS to adopt a new building management software platform (TRIRIGA, equivalent, or combination of) to support its long-range strategic capital planning objective. OSH also plans to complete the assessments of all its facilities, unfortunately deferred during the 2023-25 biennium, to establish a baseline building condition dataset to support this plan. Upon the successful completion of this project OSH will be better positioned to provide leadership with the data needed to make informed decision in support of OSH's long-term capital improvement and capital construction investment needs.

Another reach goal for the 25-27 biennium; OSH is planning to complete a comprehensive master plan of its Salem facility and grounds. The data gathered will facilitate the updating of the Oregon State Hospital Area Plan and will provide the data and guidance needed to make informed decisions on its long-term programming needs. It is also anticipated that the Junction City Campus will also undergo a programming master plan study.

OSH is not submitting a policy option package for any major capital construction or real property acquisitions for the 2025-27 biennium; however, OSH is requesting \$5,795,000 in capital improvement funding, and \$2,430,000 in deferred maintenance reduction funding; both grouped in the required capital improvement and deferred maintenance reduction policy option package (ORS 291.215). The estimated facilities investment need is \$20M (estimated at 3% of the CRV).

In addition to this request, OSH is also requesting position authorization for two FTE in support of its long-range investment facilities investment strategy.

The Oregon State Hospital appreciates the Board's time, review, and guidance on this submitted plan.

Respectfully,



D. Chris Stewart, P.E.
Director of Facilities and Support Operations

Encl: OSH 2024 CPAB Report
OSH 2024 CPAB Presentation



OREGON HEALTH AUTHORITY Oregon State Hospital Division

2023-25 Agency Facility Plan

Capital Projects Advisory Board

August 9, 2024

D. Chris Stewart, P.E.

Director of Facilities and Support Operations

AGENCY OVERVIEW



MISSION

- The Oregon State Hospital serves one of the most marginalized populations in Oregon, individuals experiencing mental illness. Maintaining well-kept, safe and functional treatment environments for Oregonians in need supports the Oregon Health Authority's strategic plan to eliminate health inequities by ensuring that all people and communities can achieve optimum physical, mental, and social well-being through partnerships, prevention, and access to quality and affordable health care.
- Its mission is to provide therapeutic, evidence-based, patient-centered treatment focusing on recovery and community reintegration in a safe environment.
- It serves more than 1,500 people per year and employs more than 2,000 staff.

PORTFOLIO

- The Oregon State Hospital (OSH) operates under the direction of the Oregon Health Authority . The Peter Courtney Salem Campus has the capacity to serve up to 620 people at a time, and the Junction Campus can serve up to 174.
- Pendleton Cottage is a residential care facility in Pendleton, Oregon and has 16 beds

SIZE

- Portfolio
 - CRV > 1M | Area → 1.22M ft² | CRV → \$671M
 - CRV < 1M | Area → 60K ft² | CRV → \$14M

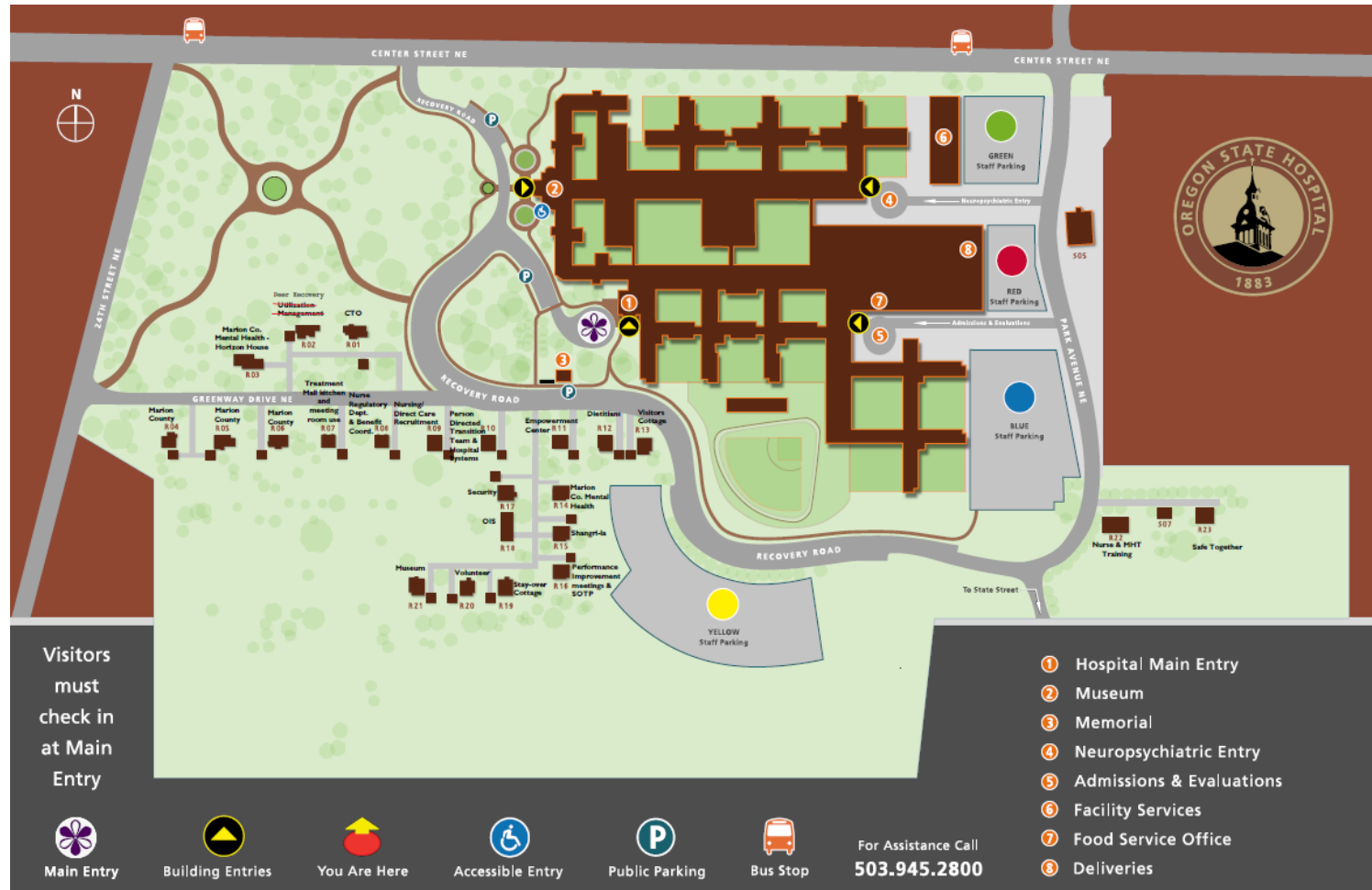
FUNDING

- 95.1% GF | 1.6% OF | 3.3% FEDERAL

PETER COURTNEY SALEM CAMPUS



PETER COURTNEY SALEM CAMPUS



JUNCTION CITY CAMPUS



PENDLETON CAMPUS



PLANNING FACTORS



CURRENT CONDITION

- OSH has reached a crossroads where its facilities have aged to the point where a robust long-term investment strategy is needed to ensure that it can effectively meet OHA's strategic plan to support all Oregonians in need of mental health treatment.

PROPOSED INVESTMENTS

- The 25/27 policy option package being proposed, minimal at best, supports OSH needs in the interim to ensure business continuity, and to reduce long term escalation in capital outlay as building systems are added to the deferred maintenance backlog.

FACILITIES INVESTMENTS	
Capital Improvement	\$ 5,795,000
Deferred Maintenance	\$ 2,430,000
TOTAL FACILITY INVESTMENTS	\$ 8,225,000
Two FTE	\$ 409,250
TOTAL INVESTMENTS	\$ 8,634,250

FACILITY STRATEGIES



EMERGENT ISSUES

- Aging building systems.
- Increased demand on the facilities.
- Increase in the wear and tear of the facilities due to the acuity and severity of symptoms of the patients admitted.

BUSINESS TREND | PROGRAM DELIVERY CHANGES

- Increase in demand for inpatient care services.
- The occupancy of the hospital is primarily determined by the judicial system.
- Periodic legal decisions will impact the number and commitment type of patients to be admitted to OSH.
- Depending on the changes in law, this can drive an increase or decrease to the facility demand, partially determined by the level of care required for new patient admissions and the associated adaptation of existing hospital space.

STRATEGIC OPPORTUNITIES

- Building condition assessments.

MASTER PLAN CONCEPTS

- Peter Courtney Salem Campus
 - Program Master Planning
 - Area Plan Update
- Junction City Campus
 - Program Master Planning
- Pendleton Campus
 - Program Master Planning

RISK/CLIMATE CHANGE MITIGATION

- Investing in HVAC upgrades to mitigate wildfire smoke affecting facility air quality.
- Investing in sustainable building system upgrades as replacements come due.
- Emergency management to support resiliency.

FACILITY INVESTMENTS



2025 - 27 DEFERRED MAINTENANCE INVESTMENTS		
LOCATION	DETAILS	COST
Salem Campus Facility	Roof replacements (18 Cottages)	\$ 900,000
Salem Campus Facility	Siding replacement and repainting (20 Cottages)	\$ 500,000
Salem Campus Facility	Asphalt recoating and restriping	\$ 275,000
Salem Campus Facility	HVAC (Cooling tower wet deck media)	\$ 75,000
Junction Campus Facility	Asphalt recoating and restriping	\$ 125,000
Pendleton Campus Facility	Asphalt Replacement	\$ 405,000
	TOTAL	\$ 2,430,000

FACILITY INVESTMENTS



2025 - 27 CAPITAL IMPROVEMENT INVESTMENTS		
LOCATION	DETAILS	COST
Salem Campus	Addition of a 2 nd floor in the Vocational Services Program – adds 32 workspaces	\$ 1,775,000
Salem Campus	Public announcement system upgrade	\$ 1,700,000
Salem Campus	Space improvements	\$ 600,000
Junction City Campus	HVAC improvements - air handler enhancements	\$ 900,000
Junction City Campus	Generator (backup) switchgear modifications	\$ 200,000
Junction City Campus	Space improvements	\$ 600,000
	TOTAL	\$ 5,795,000

NEXT STEPS



Building Assessments

Master Planning

Baseline Building Dataset Development

FACILITY CONDITION



Portfolio Facility Condition Index (FCI)





FACILITY PLAN SUMMARY

AGENCY PLAN SUMMARY	DM/LIFE SAFETY (PRIORITY 1)	CAPITAL RENEWAL (PRIORITY 2)	CAPITAL RENEWAL (PRIORITY 3)	SEISMIC/RISK (PRIORITY 4)	MODERNIZATION (NET PRIORITY 5)	TOTAL
DM/CR	\$0	\$0	\$0	\$0	\$0	\$0
Resilience/Risk	\$0	\$0	\$0	\$0	\$0	\$0
Modernization	\$0	\$0	\$0	\$0	\$0	\$0
Total	\$0	\$0	\$0	\$0	\$0	\$0

27-29



THANK YOU

Facility Plan - Maintenance Priority 1-4
 10/25-27 Biennium

Agency Name **Oregon Health Authority (OHA) | Oregon State Hospital (OSH)**

Current Maintenance Priority 1-4 for Owned Assets Over \$1M CRV

iPlan Data (Incl Soft Costs)												
Campus	Building #	Building Name	Construction Year	Gross Square Footage	Current Replacement Value	Priority 1 - Critical (Life Safety, Access, Core Utility, etc.)	Priority 2 - Potentially Critical (Near Term Replacement, Functional?)	Priority 3 - Not Critical (Deferred Maintenance)	Priority 4 - Seismic + Natural Hazard Remediation (1980 or Earlier)	Agency Input	CRV	CRV
A	B	C	D	E	F	G	H	I	J	K	L	M
OSH - Pendleton Cottage	2781	EDTC - Building C-16 Bed Residence		5,838	\$ 2,390,767							
OSH - Junction City	3384	JC Cottage 1			\$ 1,880,104							
OSH - Junction City	3385	JC Main Building		229,816	\$ 174,775,121							
OSH - Salem	309443	Motor Pool - 505	1999	4,800	\$ 2,282,250							
OSH - Salem	3590	Cottage 02	1999	4,609	\$ 2,594,152							
OSH - Junction City	3381	JC Cottage 1			\$ 1,779,273							
OSH - Junction City	3389	JC Cottage 2			\$ 1,967,285							
OSH - Pendleton Cottage	2783	EDTC - Building B-32 bed residence (E)		11,411	\$ 4,598,220							
OSH - Salem	3584	Cottage 08	1945	51,344	\$ 1,471,137							
OSH - Salem	3599	Physical Plant - Building 63	1999	33,592	\$ 4,388,611							
OSH - Salem	3589	Cottage 01	1991	3,300	\$ 1,269,262							
OSH - Salem	3602	Cottage 07	1942	2,000	\$ 1,446,036							
OSH - Salem	3606	Cottage 06	1941	2,900	\$ 2,271,111							
OSH - Salem	3608	Salem Campus Main Building	2011	812,398	\$ 454,928,153							
OSH - Salem	3610	Cottage 05	1940	2,500	\$ 2,278,240							
OSH - Pendleton Cottage	2776	EDTC - Building D-16 bed Residence		4,707	\$ 890,347							
				Subtotal Over \$1M CRV		1,189,917	\$ 671,246,077					

AREA (ft²)	AREA (ft²)	CRV	CRV
SALEM	959,376	959E-03	\$495,037,500
PC	228,816	228E-03	\$180,101,783
PENDLETON	39,350	039E-03	\$ 10,047,304
TOTAL	1,228,544	1.2E+06	\$685,186,587

Maintenance Priority 1-4 for Owned Assets Under \$1M CRV (Optional). This is not required for the budget submission or CPAB Report. Agencies may choose to complete.

iPlan Data (Incl Soft Costs)												
Campus	Building #	Building Name	Construction Year	Gross Square Footage	Current Replacement Value	Priority 1 - Critical (Life Safety, Access, Core Utility, etc.)	Priority 2 - Potentially Critical (Near Term Replacement, Functional?)	Priority 3 - Not Critical (Deferred Maintenance)	Priority 4 - Seismic + Natural Hazard Remediation (1980 or Earlier)	Agency Input	CRV	CRV
A	B	C	D	E	F	G	H	I	J	K	L	M
OSH - Pendleton Cottage	2778	EDTC - Garage 112 garage (N)		575	\$ 13,934,74							
OSH - Pendleton Cottage	2778	EDTC - Building B-10 bed residence (D)		5,090	\$ 1,074,092,86							
OSH - Pendleton Cottage	2780	EDTC - Garage 108 (H)		528	\$ 14,338,54							
OSH - Pendleton Cottage	2784	EDTC - 990			\$ 42,549,24							
OSH - Pendleton Cottage	2784	EDTC - Building 108 garage Maintenance shop		284	\$ 18,349,99							
OSH - Pendleton Cottage	2777	EDTC - Building D-6 garage building		1,572	\$ 45,641,03							
OSH - Pendleton Cottage	2778	EDTC - Building A-10 bed residence (C)		3,234	\$ 804,413,45							
OSH - Pendleton Cottage	2774	EDTC - 990			\$ 484,121,37							
OSH - Pendleton Cottage	2780	EDTC - F-Building 8 House 108			\$ 254,848,17							
OSH - Salem	3597	Cottage 14	1991	2,160	\$ 535,543,12							
OSH - Salem	3613	Cottage 16	1941	2,000	\$ 511,840,94							
OSH - Salem	3614	Cottage 03	1958	3,000	\$ 364,311,56							
OSH - Salem	3612	Cottage 23	1928	2,840	\$ 532,213,58							
OSH - Salem	3611	Building 03 - Crewnails	1996	2,300	\$ 874,562,98							
OSH - Salem	3603	Cottage 17	1952	2,200	\$ 568,629,82							
OSH - Salem	3604	Cottage 15	1952	2,300	\$ 581,192,45							
OSH - Salem	3601	Cottage 11	1951	2,300	\$ 573,409,46							
OSH - Salem	3588	Cottage 18	1944	1,820	\$ 565,082,20							
OSH - Salem	3598	Cottage 13	1951	2,300	\$ 648,787,59							
OSH - Salem	3595	Cottage 22	1949	3,010	\$ 570,426,93							
OSH - Salem	3596	Cottage 10	1946	2,000	\$ 562,462,72							
OSH - Salem	3599	Cottage 21	1958	2,300	\$ 685,699,66							
OSH - Salem	3584	Cottage 20	1959	2,300	\$ 595,542,89							
OSH - Salem	3592	Cottage 12	1951	2,000	\$ 547,165,37							
OSH - Salem	3593	Cottage 04	1958	2,500	\$ 572,868,93							
OSH - Pendleton Cottage	2773	EDTC - Building MP (purpose 1)		6,169	\$ 987,503,26							
OSH - Salem	3581	Cottage 19	1958	2,300	\$ 591,318,56							
OSH - Salem	3600	Cottage 09	1940	2,300	\$ 532,792,20							
				Subtotal Under \$1M CRV		89,367	\$13,849,416.82					

Definitions	1	Current costs for all facility maintenance and deferred maintenance except those that are covered in operations and maintenance budgets (routine maintenance).
Current Maintenance Priority 1-4	1	Current costs for all facility maintenance and deferred maintenance except those that are covered in operations and maintenance budgets (routine maintenance).
Construction Year	2	Original Construction Year
Current Replacement Value	3	Current Replacement Value Reported to Risk Management or Calculated Replacement Value Reported from Facility Conditions Assessment (FCA)
Priority One: Currently Critical	4	From the Budget Instruction: Priority One projects are conditions that require immediate action in order to address code and accessibility violations that affect life safety. Building envelope issues (roof, sides, windows and doors) that pose immediate safety concerns should be included in this category.
Priority Two: Potentially Critical	5	From the Budget Instruction: Priority Two projects are to be undertaken in the near future to maintain the integrity of the facility and accommodate current agency program requirements. Included are systems that are functioning improperly or at limited capacity, and if not addressed, will cause additional system deterioration and added repair costs. Also included are significant building envelope issues (roof, sides, windows and doors) that, if not addressed, will cause additional system deterioration and added repair costs.
Priority Three: Necessary - Not yet Critical	6	From the Budget Instruction: Priority Three projects could be undertaken in the near to mid-term future to maintain the integrity of a building and to address building systems, building components and site work that have reached or exceeded their useful life based on industry standards, but are still functioning in some capacity. These projects may require attention currently to avoid deterioration, potential downtime and consequently higher costs if corrective action is deferred.
Priority Four: Seismic and Natural Hazard Remediation	7	From the Budget Instruction: Priority Four projects improve seismic performance of buildings constructed prior to 1980 building code changes to protect occupants, minimize building damage and speed recovery after a major earthquake. Projects also include those that mitigate significant flood hazards.
Facility Condition Index	8	A calculated measure of facility condition relative to its current replacement value (expressed as a percentage)

Facility Plan - Maintenance Priority 1-4
2025-27 Biennium

Agency Name **Oregon Health Authority (OHA) | Oregon State Hospital (OSH)**

10 Year Maintenance Priority 1-4 for Owned Assets Over \$1M CRV

Campus	Building ID	Building Name	Plan Data (incl Soft Costs)				Priority 1 - Critical Life Safety, DM Code Compliance*	Priority 2 - Potentially Critical Life Safety, DM Code Compliance*	Priority 3 - Seismic Nat Haz Term Capital Renewal Functionality*	Priority 4 - Seismic Nat Haz Remediation (if applicable)	Priority 5 - Not Yet Critical (4- term)	Priority 6 - Seismic Hazard Remediation (if applicable)	Total (G+H+I+J)	Current FCV less Seismic Nat Haz (G+H+I)/F	Agency Input				
			Construction Year	Gross Square Footage	Current Replacement Value	Calculated Replacement Value									2023-26 LAB Approval	2025-27 Budget	Remaining 10 Year Need in Columns K-L		
OSH - Pendleton Cottage	2781	EOTC - Building C-16 Bed Residence		5,838	\$	2,390,767							0.000%	\$	-	\$	-	\$	-
OSH - Junction City	3383	JC Cottage 3		0	\$	1,580,103							0.000%	\$	-	\$	-	\$	-
OSH - Junction City	3382	JC Main Building				229,816							0.000%	\$	-	\$	-	\$	-
OSH - Salem	30943	Motor Pool - 905	1990			4,800							0.000%	\$	-	\$	-	\$	-
OSH - Salem	3592	Cottage 02	1909			4,609							0.000%	\$	-	\$	-	\$	-
OSH - Junction City	3381	JC Cottage 1				0							0.000%	\$	-	\$	-	\$	-
OSH - Junction City	3380	JC Cottage 2				0							0.000%	\$	-	\$	-	\$	-
OSH - Pendleton Cottage	2785	EOTC - Building E 32-bed residence (E)				11,413							0.000%	\$	-	\$	-	\$	-
OSH - Salem	3584	Cottage 08	1945			51,344							0.000%	\$	-	\$	-	\$	-
OSH - Salem	3599	Physical Plant - Building 63	1929			33,592							0.000%	\$	-	\$	-	\$	-
OSH - Salem	3588	Cottage 01	1901			3,300							0.000%	\$	-	\$	-	\$	-
OSH - Salem	3602	Cottage 07	1942			2,000							0.000%	\$	-	\$	-	\$	-
OSH - Salem	3598	Cottage 06	1941			2,900							0.000%	\$	-	\$	-	\$	-
OSH - Salem	3609	Salem Campus Main Building	2011			812,998							0.000%	\$	-	\$	-	\$	-
OSH - Salem	3610	Cottage 05	1940			2,500							0.000%	\$	-	\$	-	\$	-
OSH - Pendleton Cottage	2775	EOTC - Building D-16 bed Residence				4,707							0.000%	\$	-	\$	-	\$	-
Subtotal Over \$1M CRV						1,169,217							0.000%	\$	-	\$	-	\$	-

Maintenance Priority 1-4 for Owned Assets Under \$1M CRV (Optional) - This is not required for the budget submission or CPAB Report. Agencies may choose to complete.

Campus	Building ID	Building Name	Plan Data (incl Soft Costs)				Priority 1 - Critical Life Safety, DM Code Compliance*	Priority 2 - Potentially Critical Life Safety, DM Code Compliance*	Priority 3 - Seismic Nat Haz Term Capital Renewal Functionality*	Priority 4 - Seismic Nat Haz Remediation (if applicable)	Priority 5 - Not Yet Critical (4- term)	Priority 6 - Seismic Hazard Remediation (if applicable)	Total (G+H+I)	Current FCV less Seismic Nat Haz (G+H+I)/F	Agency Input				
			Construction Year	Gross Square Footage	Current Replacement Value	Calculated Replacement Value									2023-26 LAB Approval	2025-27 Budget	Remaining 10 Year Need in Columns K-L		
OSH - Pendleton Cottage	2778	EOTC - Garage 112 garage (N)				575							0.0%	\$	-	\$	-	\$	-
OSH - Pendleton Cottage	2778	EOTC - Building B 10- bed residence (D)				5,090							0.0%	\$	-	\$	-	\$	-
OSH - Pendleton Cottage	2782	EOTC - Garage 108 (I)				528							0.0%	\$	-	\$	-	\$	-
OSH - Pendleton Cottage	2783	EOTC - 99				5							0.0%	\$	-	\$	-	\$	-
OSH - Pendleton Cottage	2784	EOTC - Building 106 garage Maintenance shop				264							0.0%	\$	-	\$	-	\$	-
OSH - Pendleton Cottage	2777	EOTC - Building P generator building				1,572							0.0%	\$	-	\$	-	\$	-
OSH - Pendleton Cottage	2776	EOTC - Building A 10-bed residence (C)				3,234							0.0%	\$	-	\$	-	\$	-
OSH - Pendleton Cottage	2774	EOTC - 950				5							0.0%	\$	-	\$	-	\$	-
OSH - Pendleton Cottage	2780	EOTC - FVBuilding 8 House 108				254,848							0.0%	\$	-	\$	-	\$	-
OSH - Salem	3597	Cottage 14	1951			2,160							0.0%	\$	-	\$	-	\$	-
OSH - Salem	3615	Cottage 16	1941			2,000							0.0%	\$	-	\$	-	\$	-
OSH - Salem	3614	Cottage 03	1958			3,000							0.0%	\$	-	\$	-	\$	-
OSH - Salem	3612	Cottage 23	1928			2,840							0.0%	\$	-	\$	-	\$	-
OSH - Salem	3611	Building 93 - Cremains	1896			2,300							0.0%	\$	-	\$	-	\$	-
OSH - Salem	3605	Cottage 17	1952			2,200							0.0%	\$	-	\$	-	\$	-
OSH - Salem	3604	Cottage 15	1952			2,300							0.0%	\$	-	\$	-	\$	-
OSH - Salem	3601	Cottage 11	1951			2,300							0.0%	\$	-	\$	-	\$	-
OSH - Salem	3589	Cottage 18	1954			1,825							0.0%	\$	-	\$	-	\$	-
OSH - Salem	3598	Cottage 13	1951			2,300							0.0%	\$	-	\$	-	\$	-
OSH - Salem	3585	Cottage 22				3,010							0.0%	\$	-	\$	-	\$	-
OSH - Salem	3596	Cottage 10	1946			2,000							0.0%	\$	-	\$	-	\$	-
OSH - Salem	3595	Cottage 21	1958			2,300							0.0%	\$	-	\$	-	\$	-
OSH - Salem	3594	Cottage 20	1956			2,300							0.0%	\$	-	\$	-	\$	-
OSH - Salem	3593	Cottage 12	1951			2,000							0.0%	\$	-	\$	-	\$	-
OSH - Salem	3591	Cottage 04				2,500							0.0%	\$	-	\$	-	\$	-
OSH - Pendleton Cottage	2773	EOTC - Building MP multi purpose (L)				6,169							0.0%	\$	-	\$	-	\$	-
OSH - Salem	3587	Cottage 19	1958			2,300							0.0%	\$	-	\$	-	\$	-
OSH - Salem	3600	Cottage 09	1946			2,300							0.0%	\$	-	\$	-	\$	-
Subtotal Under \$1M CRV						59,367							0.0%	\$	-	\$	-	\$	-

Definitions		
Current Maintenance Priority 1-4	1	Current costs for all facility maintenance and deferred maintenance except those that are covered in operations and maintenance budgets (routine maintenance).
Construction Year	2	Original Construction Year
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Priority Four: Seismic and Natural Hazard Remediation	7	From the Budget Instructions: Priority Four projects improve seismic performance of buildings constructed prior to 1995 building code changes to protect occupants, minimize building damage and speed recovery after a major earthquake. Projects also include those that mitigate significant flood hazards.
Facility Condition Index	8	A calculated measure of facility condition relative to its current replacement value (expressed as a percentage)

Facility Plan - Maintenance Priority 5

2025-27 Biennium

Agency Name Oregon Health Authority (OHA) | Oregon State Hospital (OSH)

Current Maintenance Priority 5' for Owned Assets Over \$1M CRV

iPlan Data (Incl Soft Costs)						Agency Input				
Campus	Building ID	Building Name	Construction Year	Gross Square Footage	Current (Calculated) Replacement Value ³	Modernization Estimate	Notes/Description	2023-25 LAB Approved	2025-27 Requested Budget	Remaining Need (Estimated) = (Columns G-I-J)
A	B	C	D	E	F	G	H	I	J	K
OSH - Pendleton Cottage	2781	EOTC - Building C-16 Bed Residence	0	5,838	\$ 2,390,767	\$ -	TBD (27-29 Biennium)	\$ -	\$ -	\$ -
OSH - Junction City	3383	JC Cottage 3	0	-	\$ 1,580,103	\$ -		\$ -	\$ -	\$ -
OSH - Junction City	3382	JC Main Building	0	-	\$ 174,775,121	\$ -		\$ -	\$ -	\$ -
OSH - Salem	309443	Motor Pool - S05	1999	4,800	\$ 2,282,259	\$ -		\$ -	\$ -	\$ -
OSH - Salem	3592	Cottage 02	1909	4,609	\$ 2,552,152	\$ -		\$ -	\$ -	\$ -
OSH - Junction City	3381	JC Cottage 1	0	-	\$ 1,779,273	\$ -		\$ -	\$ -	\$ -
OSH - Junction City	3380	JC Cottage 2	0	-	\$ 1,967,285	\$ -		\$ -	\$ -	\$ -
OSH - Pendleton Cottage	2785	EOTC - Building E 32-bed residence (E)	0	11,413	\$ 2,088,220	\$ -		\$ -	\$ -	\$ -
OSH - Salem	3584	Cottage 08	1945	2,160	\$ 1,471,137	\$ -		\$ -	\$ -	\$ -
OSH - Salem	3599	Physical Plant - Building 63	1929	33,592	\$ 4,983,611	\$ -		\$ -	\$ -	\$ -
OSH - Salem	3588	Cottage 01	1901	3,300	\$ 2,605,262	\$ -		\$ -	\$ -	\$ -
OSH - Salem	3602	Cottage 07	1942	2,000	\$ 1,445,036	\$ -		\$ -	\$ -	\$ -
OSH - Salem	3606	Cottage 06	1941	2,900	\$ 2,221,111	\$ -		\$ -	\$ -	\$ -
OSH - Salem	3609	Salem Campus Main Building	2011	812,398	\$ 464,976,153	\$ -		\$ -	\$ -	\$ -
OSH - Salem	3610	Cottage 05	1940	2,500	\$ 2,278,240	\$ -		\$ -	\$ -	\$ -
OSH - Pendleton Cottage	2775	EOTC - Building D-16 bed Residence	0	4,707	\$ 1,850,347	\$ -		\$ -	\$ -	\$ -
Subtotal Over \$1M CRV				890,217	\$ 671,246,077	\$ -			\$ -	\$ -

Definitions

Priority Five: Modernization	1	From the Budget Instructions: Priority Five projects are alterations or replacement of facilities solely to implement new or higher standards to accommodate new functions, significantly improve existing functionality as well as replacement of building components that typically last more than 50 years (such as the building structure or foundations). These standards include system and aesthetic upgrades which represent sensible improvements to the existing condition. These projects improve the overall usability and reduce long-term maintenance requirements. Given the significant nature of these projects, the work typically addresses deficiencies that do not conform to current codes, but are 'grandfathered' in their existing condition to the extent feasible.
Construction Year	2	Original Construction Year
Current Replacement Value	3	Current Replacement Value Reported to Risk Management <i>or Calculated Replacement Value Reported from Facility Conditions Assessment (FCA)</i>

ESTIMATED MAINTENANCE LOAD (3% CRV) \$ 20,137,382

Agency Name Oregon Health Authority (OHA) | Oregon State Hospital (OSH)

1. What are the key drivers for your agency's facility needs, and how do you measure space/facility demand?

- The Oregon State Hospital is subject to standards determined by the Centers for Medicaid and Medicare Services (CMS) and reviewed and accredited through the Joint Commission on Accreditation of Healthcare Organizations (JCAHO).
- In addition to applying best management practices and standards for the maintenance/repair/replacement of buildings and equipment, the hospital is required to meet more stringent facilities requirements as determined by the CMS and JCAHO governing bodies.
- The occupancy of the hospital is primarily determined by the judicial system. Periodic legislative changes will impact the types and quantities of patients to be admitted to OSH. Depending on the changes in law, this can drive an increase or decrease to the facility demand, partially determined by the level of care required for new patient admissions and the associated adaptation of existing hospital space.
- Occupancy requirements and needs are dynamic. The measurement of space is completed through monitoring of legislative and regulatory requirements, with associated increases or decreases to staffing dependent on shifting requirements and the

2. What are the key facility-related challenges over the next 10-years? (Please answer in order of priority)

- Increase demand in patient services.
- Above average use/wear of building systems due to the 24/7 operations schedule and hospital operations environment.
- Keeping up with the demand for hospital services programming.
- Deferred maintenance: the replacement of building systems and equipment that have met their useful life.
- Responding to regulatory changes requiring facility improvements.
- The need for the development of a long-term strategic planning framework.
- Above standard wear and tear of a facility partially occupied by persons not invested in long term facility care.
- Emergency management and resiliency planning.

3. What do you need to meet these challenge

- Completing a statewide building assessment of all OSH facilities; including Salem, Junction City, and Pendleton.
- Introducing a software platform (TRIRIGA or equal) to provide long-term strategic capital planning data.
- Updating the Oregon State Hospital Area Plan (125-125-0350).
- Completing a master plan for the Oregon State Hospital facility (including the cottages).

Facility Plan - Facility Summary Report 107BF16a

2025-27 Biennium

Agency Name

Oregon Health Authority (OHA) | Oregon State Hospital (OSH)

Table A: Owned Assets Over \$1M CRV		FY 2024 DATA					
Total Number of Facilities Over \$1M			16				
Current Replacement Value \$ (CRV)	1	\$	671,246,077	Source	4	Risk	Risk or FCA
Total Gross Square Feet (GSF)			1,169,217				
Office/Administrative Usable Square Feet (USF)	2		675,451	Estimate/Actual	5	73%	% USF/GSF
Occupants Position Count (PC)	3		1,751	Office/Admin USF/PC or Agency Measure	6		
					7	JCAHO (see note below)	
						OSH is regulated by the Joint Commission on Accreditation of Healthcare Organizations (JCAHO). Agency USF measures are the number of beds and average daily positions.	
						OSH is a 24/7 facility with three shifts. We calculate 2/3 of total position count for space occupied by a person during their shift.	
Table B: Owned facilities under \$1M CRV							
Number of Facilities Under \$1M			28				
CRV	1	\$	13,940,516				
Total Gross Square Feet (GSF)			59,367				

Table C: Leased Facilities							
Total Rented SF	8		0				
Total 2023-25 Biennial Lease Cost		\$	-				
Additional 2023-25 Costs for Lease Properties (O&M)	9		0				
Office/Administrative Usable Square Feet (USF)	2		0	Estimate/Actual	5		% USF/GSF
Occupants Position Count (PC)	3		0	Office/Admin USF/PC	6		

Definitions

CRV	1	Current Replacement Value Reported to Risk Management or Calculated Replacement Value Reported from iPlan Facility Conditions Assessment (FCA)
USF	2	Usable Square Feet per BOMA definition for office/administrative uses. Area of a floor occupiable by a tenant where personnel or furniture are normally housed plus building amenity areas that are convertible to occupant area and not required by code or for the operations of a building. If not known, estimate the percentage.
Occupant Position Count (PC)	3	Total Legislatively Approved Budget (LAB) Position Count within the buildings or leases as applicable.
Source	4	Enter Source of CRV as "Risk" or "FCA"
Estimate/Actual	5	Use actual USF % of USF to GSF, if available. If not known, estimate the percentage.
Office/Administrative USF/PC	6	Divide your USF by your position count. If office/admin space is a less than 10% of your space use, fill in N/A and fill in #7, "Agency Measure".
Agency Measure	7	If not using USF/PC, insert Agency Measure as defined in 107BF02 question #1.

	RSF	8	Rentable SF per BOMA definition. The total usable area plus a pro-rated allocation of the floor and building common areas within a building.
	O&M	9	Total Operations and Maintenance Costs for facilities including all maintenance, utilities and janitorial

Facility Plan - Facility O&M/DM Report 107B16b

2025-27 Biennium

Agency Name

Oregon Health Authority (OHA) | Oregon State Hospital (OSH)

Facilities Operations and Maintenance (O&M) Budget excluding Capital Improvements and Deferred Maintenance

Personal Services (PS) Operations and Maintenance
 Services and Supplies (S&S) Operations and Maintenance
 Utilities not included in PS and S&S above
Total O&M
O&M \$/SF

1	2021-23 Actual	2023-25 LAB	2025-27 Estimated	2027-29 Estimated
	\$ 13,873,021	\$ 14,940,668	\$ 17,725,956	\$ 18,396,219
	\$ 4,219,919	\$ 3,695,019	\$ 3,850,210	\$ 4,011,919
	\$ 3,708,322	\$ 4,008,255	\$ 4,176,602	\$ 4,352,019
	\$ 21,801,262	\$ 22,643,942	\$ 25,752,768	\$ 26,760,157
	18.65	19.37	22.03	22.89

Total O&M SF

1,169,217 Include only the SF for which your agency provides O&M funding.

O&M Estimated Fund Split Percentage %

2	General Fund	Lottery Fund	Other Funds	Federal Funds
	95%		2%	3%

Deferred Maintenance Funding In Current Budget Model

Total Short and Long Term Deferred Maintenance Plan for Facilities

Priorities 1-3 - Currently, Potentially and Not Yet Critical
 Priority 4 - Seismic & Natural Hazard
 Priority 5 - Modernization
Total Priority Need
Facility Condition Index (Priority 1-3 Needs/CRV)

3	2025-27 Biennium		Ongoing Budgeted (non POP)	Ongoing Budgeted (non POP)
4,5,6	Current Costs 2024	Ten Year Projection	2025-27 Budgeted SB 1067 (2% CRV min.)	2027-29 Projected SB 1067 (2% CRV min.)
7	\$17,326,312	\$15,355,356	\$10,343,356	\$10,225,091
8	\$0	\$0	\$0	\$0
9	\$0	\$0	\$0	\$0
	\$17,326,312	\$15,355,356	\$10,343,356	\$10,225,091
	TBD (27-29 Biennium)			

SB 1067 Guidance Below
 If your allocation is <> 2%, replace with your value
 (minus DM funding in current budget model)

Assets CRV

\$0 Current Replacement Value Reported to Risk or Calculated Replacement Value Reported from Facility Conditions Assessment (FCA)

Process/Software for routine maintenance (O&M)
 Process/Software for deferred maintenance/renewal
 Process for funding facilities maintenance

zLink Maintenance and Work Order Software Provide narrative
 zLink Maintenance and Work Order Software Provide narrative
 Contained within the Oregon State Hospital Budget Provide narrative

From iPlan FCA

Definitions

Facilities Operations and Maintenance Budget	1	The Facilities Operations and Maintenance budget includes costs to operate and maintain facilities and keep them in repair including utilities, janitorial and maintenance costs. Maintenance costs are categorized as external building (roof, siding, windows, etc.); interior systems (electrical, mechanical, interior walls, doors, etc.); roads and ground (groundskeeper, parking lots, sidewalks, etc.) and centrally operated systems (electrical, mechanical, etc.). Agencies with significant facilities may include support staff if directly associated with facilities maintenance activities. Do not include other overhead costs such as accounting, central government charges, etc.
O&M Estimated Fund Split Percentage %	2	Show the fund split by percentage of fund source allocated to facility O&M for your agency

Total Short and Long Term Maintenance and Deferred Maintenance Plan for Facilities Value Over \$1M	3	All Maintenance excluding routine O&M costs. 23-25 and 25-27 auto-populates with 2% of the sum of your agency portfolio's CRV. Written to deliver on SB 1067: SECTION 9. (1) Each biennium, the Governor shall propose as part of the Governor's recommended budget an amount for deferred maintenance and capital improvements on existing state-owned buildings and infrastructure that is equivalent to at least two percent of the current replacement value of the state-owned buildings and infrastructure.
Priority One: Currently Critical	4	From the Budget Instruction: Priority One projects are conditions that require immediate action in order to address code and accessibility violations that affect life safety. Building envelope issues (roof, sides, windows and doors) that pose immediate safety concerns should be included in this category.
Priority Two: Potentially Critical	5	From the Budget Instruction: Priority Two projects are to be undertaken in the near future to maintain the integrity of the facility and accommodate current agency program requirements. Included are systems that are functioning improperly or at limited capacity, and if not addressed, will cause additional system deterioration and added repair costs. Also included are significant building envelope issues (roof, sides, windows and doors) that, if not addressed, will cause additional system deterioration and added repair costs.
Priority Three: Necessary - Not yet Critical	6	From the Budget Instructions: Priority Three projects could be undertaken in the near to mid-term future to maintain the integrity of a building and to address building systems, building components and site work that have reached or exceeded their useful life based on industry standards, but are still functioning in some capacity. These projects may require attention currently to avoid deterioration, potential downtime and consequently higher costs if corrective action is deferred.
Priority Four: Seismic and Natural Hazard Remediation	7	From the Budget Instructions: Priority Four projects improve seismic performance of buildings constructed prior to 1995 building code changes to protect occupants, minimize building damage and speed recovery after a major earthquake. Projects also include those that mitigate significant flood hazards.
Priority Five: Modernization	8	From the Budget Instructions: Priority Five projects are alterations or replacement of facilities solely to implement new or higher standards to accommodate new functions, significantly improve existing functionality as well as replacement of building components that typically last more than 50 years (such as the building structure or foundations). These standards include system and aesthetic upgrades which represent sensible improvements to the existing condition. These projects improve the overall usability and reduce long-term maintenance requirements. Given the significant nature of these projects, the work typically addresses deficiencies that do not conform to current codes, but are 'grandfathered' in their existing condition to the extent feasible.
Facility Condition Index	9	A calculated measure of facility condition relative to its current replacement value (expressed as a percentage)

Facility Plan - Major Construction/ Acquisition Project Narrative 107BF11

2025-27 Biennium Agency Name

Oregon Health Authority (OHA) | Oregon State Hospital (OSH)

Note: Complete a separate form for each project

Agency	Oregon Health Authority (OHA) Oregon State Hospital (OSH)		Schedule	
Project Name	None	Cost Estimate	Cost Est. Date	Start Date
		\$ -		
Address /Location	2600 Center St NE, Salem, OR 97301	GSF	# Stories	Land Use/Zoning Satisfied
				Y N

Funding Source/s: Show the distribution of dollars by funding source for the full project cost.	General Funds	Lottery	Other	Federal
	100			

Description of Agency Business/Master Plan and Project Purpose/Problem to be Corrected

The hospital has identified an administrative and program staff space shortage and have had to move staff and programs to the cottages on campus and have identified future space needs requiring additional staff space.

Project Scope and Alternates Considered

OSH is at a crossroads where its facilities have reached an age where a robust long-term investment strategy is needed to ensure that it can effectively meet OHA's strategic plan to support all Oregonians in need of mental health treatment. This policy option package provides the support OSH needs in the interim to ensure business continuity, and to reduce long term escalation in capital outlay as building systems are added to the deferred maintenance backlog.

This investment is part of an over-arching long-term strategic facilities investment plan to ensure that OSH's strategic plan can be realized and managed in perpetuity, especially as its facilities and site systems are aging. The investments that are submitted via this policy package are one part of a multi part planning effort to ensure that all of OSH's facilities are mission ready and to ensure uninterrupted business continuity.

This long-term capital planning objective is to adopt a facilities portfolio management system that will provide a dynamic facilities condition index as a measuring metric to support informed decision making as investments in minor, major, capital improvement, and capital construction projects load continuously increase, and to ensure business continuity and adaptability needs are supported.

The maintenance projections that are created by the Facilities Program are based on a tracked metric called the Facility Condition Index (FCI). The FCI is a standard facility management benchmark that is used to objectively assess the current and projected condition of a building asset and provide a means for comparisons of facility or building conditions, as well as allowing for renewal funding needs and comparisons. The FCI is the ratio of current year required renewal cost to current building replacement value, or in other words, a calculated measure of facility condition relative to its current replacement value expressed as a percentage. Based on this index, a structure's condition can be ranked as Good (0-5% FCI), Fair (5-

10%), Poor (>10%) or Very Poor (>60%). An FCI of 60% or greater usually indicates that the structure should be replaced rather than renewed.

The fundamental drivers of this plan include:

- Effective long-range capital planning for maximizing the use and value of our facilities via a consistent 10-year planning vision.
- Being good stewards of our investments: this is where public investments are properly maintained to ensure occupant safety, being nimble as programming needs change or evolve, and the reduction of long-term operating costs.
- Designing for quality: good building design contributes to higher employee productivity and adaptability and enhanced public service.
- Right sizing our portfolio: sustainability and resiliency being very high priorities, and meeting agencies programming needs.
- Conveying our identity: ensuring that our buildings have an image of accessibility and responsiveness (in-short, how adaptable are our buildings to program changes).
- Emphasizing resiliency: ensuring that buildings are prepared to withstand catastrophic events – both natural (earthquake) and man-made (climate change which could affect HVAC loads, snow loads, etc.).
- Applying best practices when maintaining and planning for new facilities: for example, utilizing Master Planning to help facilitate the long-term need when planning for larger capital improvement and capital construction projects.
- Facility investment tool: effective investment strategy that leverages matching dollars.

OSH is committed to comply with regulatory requirements and achieve good stewardship of state assets to provide a safe and therapeutic environment of care to Oregon's most vulnerable populations.

Project Budget Estimate - Escalate to the mid-point of construction. Use 4.5% Annual Escalation.

DIRECT CONSTRUCTION COSTS	\$	% Project Cost	\$/GSF
1 Building Cost Estimate	\$ -		
2 Site Cost Estimate (20 Ft beyond building footprint)			
3 TOTAL DIRECT CONSTRUCTION COSTS	\$ -		

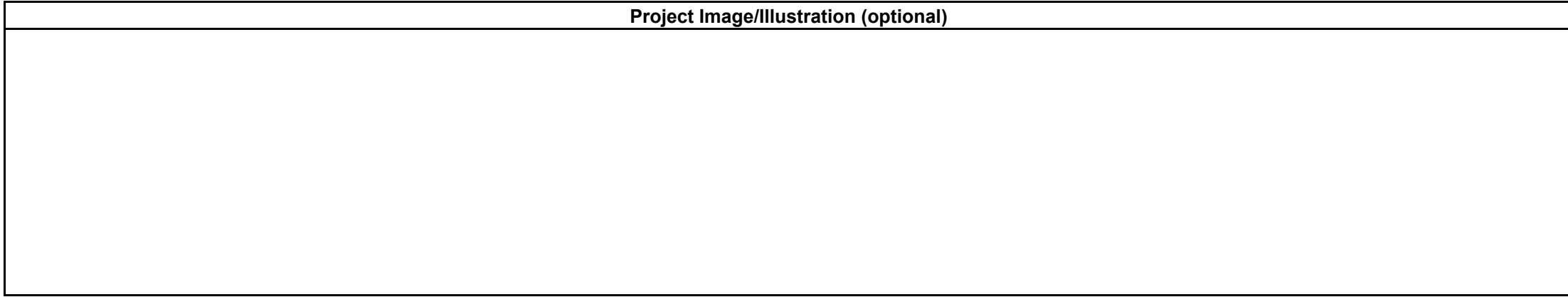
INDIRECT CONSTRUCTION COSTS			
4 Owner Equipment / Furnishings / Special Systems			
5 Construction Related Permits & Fees			
6 Other Indirect Construction Costs Including 1% Art, 1.5% Renewable Energy and other state requirements			
7 Architectural, Engineering Consultants			
8 Other Design and PM Costs			
9 Relocation/Swing Space Costs			
10 TOTAL SOFT COSTS			

11 OWNER'S PROJECT CONTINGENCY			
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	\$	% Project Cost	\$/GSF
TOTAL PROJECT COST	\$ -		

Cost Estimate Source (EG Agency, Cost Estimator, A/E, etc.)

Project Image/Illustration (optional)



Facility Plan - 10 Year Space Needs Summary Report

2025-27 Biennium

Agency Name **Oregon Health Authority (OHA) | Oregon State Hospital (OSH)**

Note: List each project/lease or disposal separately.

Proposed New Construction or Acquisition - Complete for 5 Biennia

Biennium	Agency Priority	Concept/Project Name	Description	GSF	Position Count ¹	General Fund	Other Funds	Lottery Funds	Federal Funds	Estimated Cost/Total Funds
2025-27		None	NA							
2027-29		TBD	TBD							
2029-31		TBD	TBD							
2031-33		TBD	TBD							
2033-35		TBD	TBD							

Proposed Lease Changes over 10,000 RSF - Complete for 3 Biennia

Biennium	Location	Description/Use	Term in Years	Total RSF ² +/- (added or eliminated)	USF ³	Position Count ¹	Biennial \$ Rent/RSF ²	Biennial \$ O&M ⁴ /RSF ² not included in base rent payment	Total Cost/Biennium
				A	B	C	D	E	(D+E) * A
2025-27	None	NA							
2027-29	TBD	TBD							
2029-31	TBD	TBD							
2031-33	TBD	TBD							
2033-35	TBD	TBD							

Proposed Lease Changes over 10,000 RSF - Complete for 3 Biennia

Biennium	Location	Description/Use	Term in Years	Total RSF ² +/- (added or eliminated)	USF ³	Position Count ¹	Biennial \$ Rent/RSF ²	Biennial \$ O&M ⁴ /RSF ² not included in base rent payment	Total Cost/Biennium
				A	B	C	D	E	(D+E) * A
2025-27	None	NA							
2027-29	TBD	TBD							
2029-31	TBD	TBD							
2031-33	TBD	TBD							
2033-35	TBD	TBD							

Planned Disposal of Owned Facility

Biennium	Facility Name	Description
2025-27	None	NA
2027-29	TBD	TBD
2029-31	TBD	TBD
2031-33	TBD	TBD
2033-35	TBD	TBD

Definitions

Occupant Position Count (PC)	1	Estimated Position Count assigned to (home location) each building or lease as applicable
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RSF	2	Rentable SF per BOMA definition. The total usable area plus a pro-rated allocation of the floor and building common areas within a building.
USF	3	Usable Square Feet per BOMA definition for office/administrative uses. Area of a floor occupiable by a tenant where personnel or furniture are normally housed plus building amenity areas that are convertible to occupant area and not required by code or for the operations of a building. If not known, estimate the percentage.
O&M	4	Total Operations and Maintenance Costs for facilities including all maintenance, utilities and janitorial