



LAKE WILDERNESS ELEMENTARY SCHOOL MODERNIZATION

**State of Washington
Capital Projects Advisory Review Board (CPARB)
Project Review Committee (PRC)**

Application for Project Approval

**Submitted by
The Tahoma School District
For approval to use GC/CM**

State of Washington
Capital Projects Advisory Review Board (CPARB)
Project Review Committee (PRC)

APPLICATION FOR PROJECT APPROVAL

TO USE THE

**GENERAL CONTRACTOR/CONSTRUCTION MANAGER (GC/CM)
or DESIGN-BUILD (D-B) ALTERNATIVE CONTRACTING PROCEDURE**

The CPARB PRC will only consider complete applications: Incomplete applications may result in delay of action on your application. Responses to Questions 1-8 and 10 should not exceed 20 pages (font size 11 or larger). Provide no more than six sketches, diagrams or drawings under Question 9. (Note: A **Public Body** that is certified to use the GC/CM procedure and is seeking approval to use this procedure on a GC/CM project with a total project cost of less than \$10 million is not required to submit information for Questions 7 or 8.)

1. Identification of Applicant

(a) Legal name of Public Body (your organization):
The Tahoma School District No. 409

(b) Address:
**25720 Maple Valley Black Diamond Rd SE
Maple Valley, WA 98038**

(c) Contact Person Name: **Lori Cloud**
Title: **Assistant Superintendent**

(d) Phone Number: **425-413-3433**
E-mail: **lcloud@tahomasd.us**

2. Brief Description of Proposed Project

Please describe the project in no more than two short paragraphs.

The project proposal is to fully renovate the existing Lake Wilderness Elementary building in order to convert the existing school occupancy of over 1,000 students to a capacity of 550 students. This will include the demolition/removal of multiple portable classrooms, potential demolition of one of the three existing buildings, complete systems upgrade including but not limited to mechanical, plumbing, electrical, fire and life safety, security, re-roof, structural/seismic upgrades, building envelope improvements (roof, doors, windows, etc.) interior finishes, gymnasium floor and equipment, site circulation (including student drop-off, parking and bus loop), playground, fields and miscellaneous site and landscaping improvements.

3. Projected Total Cost for the Project:

Note: By law, the D-B contracting procedure cannot be used unless the total cost of the project is over \$10 million. Although there is no total project cost requirement for using the GC/CM contracting procedure, every applicant must provide the information requested in Question 3.

A. Project Budget -

| | |
|---|--------------|
| Cost of Professional Services | \$1,567,000 |
| Construction GMP, including GC/CM contingency | \$10,922,181 |
| Equipment & Furnishings | \$550,000 |
| Contingencies (design, escalation, owner, program.) | \$1,026,000 |
| Contract Administration Costs | \$100,000 |
| Other Related Project Costs | \$491,000 |

Sales Tax
Total

\$1,028,833
\$15,685,014

B. Funding Status

Please describe the funding status for the whole project.

(If funding is not available, please explain how and when funding is anticipated)

This project is funded by the 2013 Bond Program.

4. Anticipated Project Design and Construction Schedule

Please provide:

The anticipated project design and construction schedule, including (1) procurement; (2) hiring consultants if not already hired; and (3) employing staff or hiring consultants to manage the project if not already employed or hired. *(See Attachment B for an example schedule.)*

Project Milestones:

| | |
|------------------------------|-----------------------|
| Architect Selection | December 2014 |
| PRC Consideration | January 22, 2015 |
| Issue GC/CM RFQ | January 26, 2015 |
| GC/CM Shortlist | February 23, 2015 |
| GC/CM Interviews | March 9, 2015 |
| Preconstruction/Design | March 2015-April 2016 |
| Building Construction begins | April 2016 |
| Construction complete | December 2017 |

If your project is already beyond completion of 30% drawings or schematic design, please list compelling reasons for using the GC/CM or D-B contracting procedure.

5. Why the GC/CM or D-B Contracting Procedure is Appropriate for this Project

Please provide a detailed explanation of why use of the contracting procedure is appropriate for the proposed project. Please address the following, as appropriate:

For GC/CM projects:

- If implementation of the project involves complex scheduling, phasing, or coordination, what are the complexities?
- If the project involves construction at an existing facility that must continue to operate during construction, what are the operational impacts on occupants that must be addressed? *(Please identify functions within the existing facility which require relocation during construction and how construction sequencing will affect them. As part of your response you may refer to the drawings or sketches that you provide under Question 9.)*
- If involvement of the GC/CM is critical during the design phase, why is this involvement critical?
- If the project encompasses a complex or technical work environment, what is this environment?
- If the project requires specialized work on a building that has historical significance, why is the building of historical significance and what is the specialized work that must be done?

The Lake Wilderness Elementary Modernization Project meets statute criteria as follows:

- **Phased construction on an occupied site** – It is critical that a GCCM be on board during construction, as Lake Wilderness Elementary will remain open and operational for the duration. Multiple, elaborate, phased logistic plans for both the buildings and the project site must be coordinated on an ongoing basis. Existing fire and life safety systems must be maintained throughout the project and a plan must be established to maintain food service operations and

safe access for students and staff for learning and outdoor play. The site layout is compact, and the GCCM will require laydown and storage areas on the site, in addition to construction delivery points and access. These designated laydown and access areas are likely to change often as work progresses and at times be directly adjacent to areas where learning is taking place. Noise and site housekeeping impacts must be considered at all times, and be adjusted as necessary to allow the work to progress with as minimal of an impact to the occupants as possible. Lake Wilderness Elementary is located on a busy road, and surrounded on all sides by residential housing developments. The GC/CM, owner, and owner's representative will need to work closely on the logistics and coordination efforts before and during the project construction to ensure safety and success of the project.

- **Complex scheduling** – Lake Wilderness Elementary is one of several schools which will be affected by district realignment, involving the sequencing of projects including the construction of a new high school. Lake Wilderness, which is currently the largest elementary school in the state, will remain an elementary school but be reduced by half its size in this modernization. Scheduling must all be carried out exactly as planned in order for the district to carry on operations uninterrupted. Having a GC/CM on board will enable the District to identify potential issues, long-lead procurement items, and value engineering opportunities and greatly improve the coordination of early subcontractor bid packages.
- **GCCM is critical during the design phase** – The project consists of significant upgrades to every critical building operating system; the GCCM's involvement during preconstruction and constructability in determining the temporary needs as well as the most valuable permanent needs is critical to design. Existing buildings will be retained during the modernization, and there will be destructive testing and exploration activities to be done throughout design and preconstruction to determine construction phase requirements.

6. Public Benefit

In addition to the above information, please provide information on how use of the GC/CM or D-B contracting procedure will serve the public interest. For example, your description must address, but is not limited to:

- How this contracting method provides a substantial fiscal benefit; or
- How the use of the traditional method of awarding contracts in a lump sum (the "design-bid-build method") is not practical for meeting desired quality standards or delivery schedules.

GC/CM provides substantial public benefit over traditional design-bid-build by:

- **GC/CM will benefit the public by increasing predictability and reducing financial risk**
The GC/CM is closer to actual costs for subcontractors, increasing the confidence level of preconstruction estimates. With the GC/CM delivery method, TSD will be able to have a higher degree of predictability in estimating anticipated construction costs during the design effort.

Due to the logistics, complexity and timing of the projects, a DBB delivery process is a high risk approach for both the Owner and prospective DBB General Contractors.

In a GC/CM process, the team will be able to negotiate appropriate means of addressing the types of risk on the project during preconstruction. The GC/CM delivery method is conducive to reducing both the substantive and perceived risks in the bidding process. The GC/CM will be able to define otherwise unknown conditions and assemble bid packages in logical and manageable sizes for qualified and informed bidders. This method minimizes conflicts and disputes, minimizes change orders, maintains schedule, and can achieve a truer total project cost with reduced variability. This translates to a lower risk for significant changes to the GMP and schedule.

- **Quality** – Having a GC/CM on the project will help provide value added product selection for building performance and longevity. Having resources available to assist with design, installation, and operational strategies will be beneficial.

OAC Services recent experience on similar GC/CM solicitations attracted the region's best general contractors with excellent results in preconstruction and construction phase services.

7. Public Body Qualifications

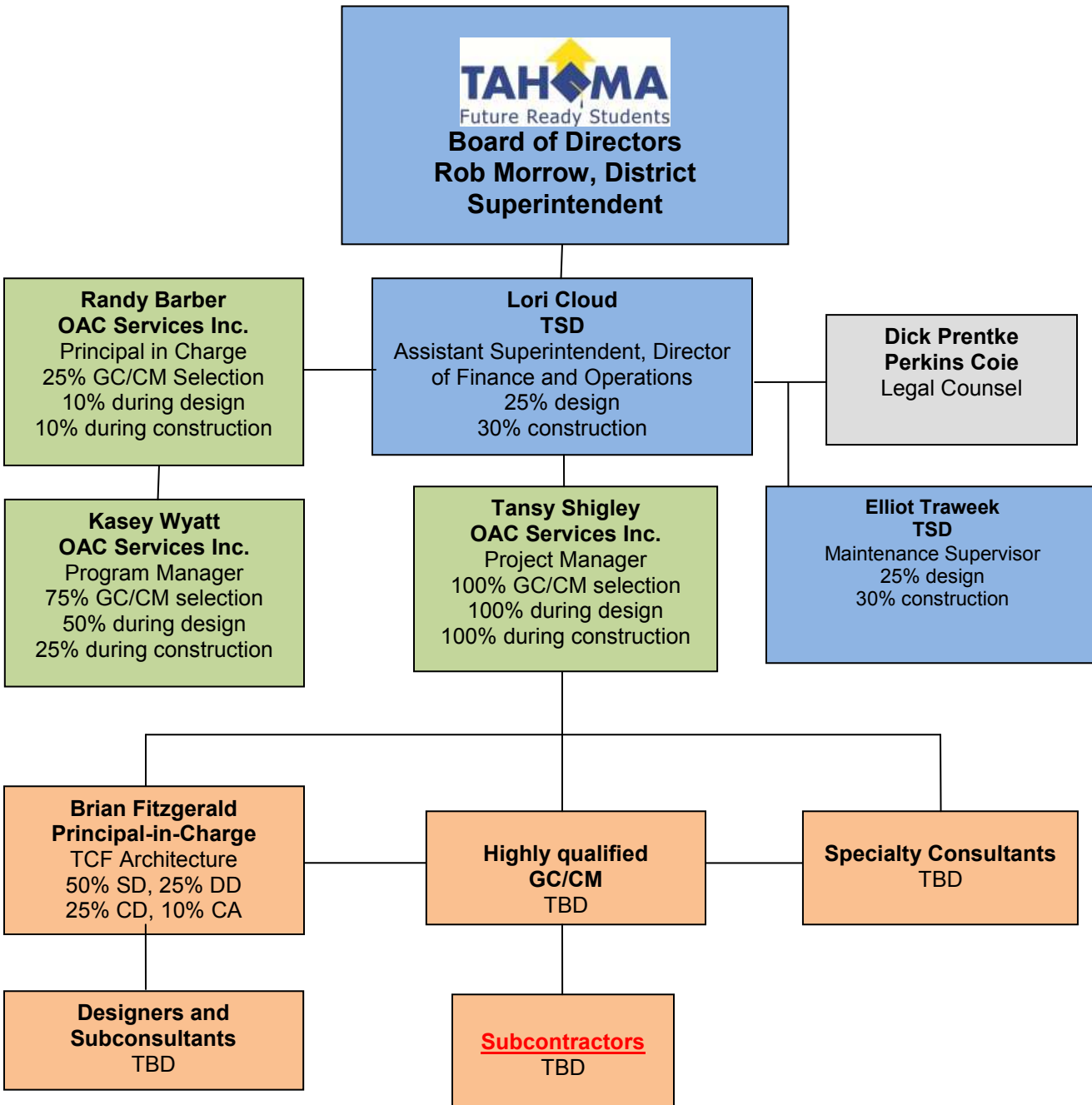
Please provide:

- A description of your organization's qualifications to use the GC/CM or D-B contracting procedure.
- A **Project** organizational chart, showing all existing or planned staff and consultant roles. *Note: The organizational chart must show the level of involvement and main responsibilities anticipated for each position throughout the project (for example, full-time project manager). If acronyms are used, a key should be provided. (See Attachment C for an example.)*
- Staff and consultant short biographies (not complete résumés).
- Provide the **experience and role on previous GC/CM or D-B projects** for each staff member or consultant in key positions on the proposed project. *(See Attachment D for an example.)*
- The qualifications of existing or planned for project manager and consultants. *Note: For design-build projects, you must have personnel who are independent of the design-build team, knowledgeable in the design-build process, and able to oversee and administer the contract.*
- The qualifications of an interim project manager until your organization has employed staff or hired a consultant as the project manager. Also indicate whether sufficient funds are available for this purpose and how long it is anticipated the interim project manager will serve. *Note: This information is required only if your organization has yet to select a project manager at the time of application.*
- A brief summary of the construction experience of your organization's project management team that is relevant to the project.
- A description of the controls your organization will have in place to ensure that the project is adequately managed.
- A brief description of your planned GC/CM or D-B procurement process.
- Verification that your organization has already developed (or provide your plan to develop) specific GC/CM or D-B contract terms.

Tahoma School District has retained a highly qualified project management firm with extensive GC/CM expertise. See Attachment A for additional detail.

The Tahoma School District has retained OAC Services to manage the overall program including GC/CM process. OAC is an industry leader in alternative delivery contracting in the state of Washington. OAC is currently involved in 33 projects being delivered using alternative delivery methods.

Project Organization Chart—Tahoma High School and Regional Learning Center



The Project Team

Lori Cloud

Assistant Superintendent, Director of Finance and Operations, Tahoma School District

Lori has been Director of Finance and Operations for the Tahoma School District since August 2002, and became the Assistant Superintendent in 2014. She is a CPA, a graduate of the University of Montana and has many years of financial experience in the private sector. Lori oversees all finance and operational functions for the District, as well as capital projects. She was responsible for the renovation of the Historic Tahoma Middle School, as well as the construction of a new Transportation Center, and the current planning and design for the New Tahoma High School, a complex GCCM project.

Elliot Traweek

Maintenance Supervisor, Tahoma School District

Elliot joined the District in Spring of 2012 as the Maintenance Supervisor. Previously he was a mechanical HVAC technician for McKinstry for 12 years. He brings 20 years of HVAC experience to the District as a Licensed Journeyman. In the short time Elliot has been with the District, he has made great improvements and efficiencies in mechanical systems throughout the District.

Dick Prentke

Perkins Coie, Chair of Construction Group

Mr. Prentke will prepare contract documents for the GC/CM integrated with the Architect's contract. The contract documents will be distributed along with clear scope definition, a Cost Responsibility Matrix and other documents for short-listed GC/CM proposers to use when quoting Fees and Specified General Conditions.

Mr. Prentke has over 30 years in the practice of construction law including schools and alternative project delivery methods.

Randy Barber

Mr. Barber has over 30 years construction experience including extensive education and public works projects. Mr. Barber works closely with OAC Services co-principals for GC/CM execution and best practices.

Mr. Barber will support the project during the GC/CM selection, contract negotiations, execution, and during construction. He will coordinate value-added measures and be responsible for quality control for management services.

Kasey Wyatt

OAC Associate

Ms. Wyatt has over 19 years of school construction and project management experience, including 7 GC/CM projects.

Ms. Wyatt will have a supporting role, overseeing the design and construction phases of the project. Currently leading three GC/CM projects valued at approximately \$215 million, Ms. Wyatt is a highly skilled GC/CM practitioner. She builds highly collaborative designer-contractor-owner teams focused on the owner's needs throughout.

Tansy Shigley

OAC Project Manager

Mrs. Shigley has over 11 years of school construction and project management experience, including 4 GC/CM projects.

Ms. Shigley will be TSD's lead in the oversight and management during the design, bid, and contract phases of the project, including oversight of bid, contract and project management documents and procedures prepared by the GC/CM. Mrs. Shigley is a highly experienced GC/CM practitioner and project construction manager.

Brian Fitzgerald, AIA

Managing Principal Architect

Mr. Fitzgerald will serve as the Principal-in-Charge for TCF Architecture. He leads the firm's educational facilities studio, and is a Recognized Educational Facility Planner (REFP) through CEFPI.

Brian will serve as Principal In Charge, Project Manager and Design Lead for the Lake Wilderness Elementary Modernization project. His experience focus for the majority of his career has been on public sector educational facilities, primarily using the Design-Build-Build project delivery method, but also includes GCCM as TCF's role as Associate Architect for the \$56.7 million Lincoln High School Renovation in Tacoma. His private sector experience includes a significant number of projects delivered with the "Team Build" (or General Contractor Design Assist) method with is very similar to GCCM.

Organizational Controls

TSD has engaged OAC Services, Inc., who has extensive project controls and reporting systems to effectively manage, the scope, schedule and budget for the projects. Ms. Wyatt will work with TSD in the implementation of standard project budgeting tools and project management websites to manage communications and monitor progress. Budget tracking tools will establish the overall detailed budget to be approved by the TSD Board and then track actual expenses and forecast future costs. Schedule progress will be tracked against the master schedule.

Planned GC/CM Process

TSD is planning on utilizing a modified AIA133/CMC owner agreement along with modified AIA201 general conditions developed in close coordination with legal counsel. In addition, TSD is planning on a comprehensive preconstruction services scope of work and general requirements (Division 01) that will be coordinated thoroughly with the modified AIA documents for the GC/CM construction procurement within Washington State.

Preparation of the GC/CM RFP and selection process will be based on an OAC standard form and modified with the latest lessons learned from other public owners. This process will include selection criteria, interviews and final selection evaluations.

The roles and responsibilities of the owner, construction management team, architect, and the GC/CM are defined and coordinated through a number of responsibilities and contractual requirements.

8. Public Body (your organization) Construction History:

Provide a matrix summary of your organization's construction activity for the past six years outlining project data in content and format per the attached sample provided: *(labeled Att. 'E')*

- Project Number, Name, and Description
- Contracting method used
- Planned start and finish dates
- Actual start and finish dates
- Planned and actual budget amounts
- Reasons for budget or schedule overruns

Please refer to Attachment B.

9. Preliminary Concepts, sketches or plans depicting the project

To assist the PRC with understanding your proposed project, please provide a combination of up to six concepts, drawings, sketches, diagrams, or plan/section documents which best depict your project. In electronic submissions these documents must be provided in a PDF or JPEG format for easy distribution. Some examples are included in attachments E1 thru E6. At a minimum, please try to include the following:

- A overview site plan (indicating existing structure and new structures)
- Plan or section views which show existing vs. renovation plans particularly for areas that will remain occupied during construction.
-

Note: applicant may utilize photos to further depict project issues during their presentation to the PRC

Please refer to Attachment C.

10. Resolution of Audit Findings On Previous Public Works Projects

No unresolved findings.

Caution to Applicants

The definition of the project is at the applicant's discretion. The entire project, including all components, must meet the criteria to be approved.

Signature of Authorized Representative

In submitting this application, you, as the authorized representative of your organization, understand that: (1) the PRC may request additional information about your organization, its construction history, and the proposed project; and (2) your organization is required to submit the information requested by the PRC. . You agree to submit this information in a timely manner and understand that failure to do so shall render your application incomplete.

Should the PRC approve your request to use the GC/CM or D-B contracting procedure, you also understand that: (1) your organization is required to participate in brief, state-sponsored surveys at the beginning and the end of your approved project; and (2) the data collected in these surveys will be used in a study by the state to evaluate the effectiveness of the GC/CM or D-B process. You also agree that your organization will complete these surveys within the time required by CPARB

Signature  _____

Name (please print): Lori Cloud

Title: Assistant Superintendent

Date: 12/23/2014

ATTACHMENT “A” Team Experience

The following table lists some (but not all) of the relevant Alternative Delivery Experience of the [TSD](#) team.

| Name | Summary of Experience | Projects | Construction Budget | Procurement Type | Role During Project Phases | | |
|-----------------------------|---|--|--|---|--|--|--|
| | | | | | Pre-Design | Design | Construction |
| Lori Cloud | Assistant Superintendent/ Director of Finance & Operations Tahoma School District | | M | M | | | |
| Kasey Wyatt | Associate/Sr. Project Manager, OAC Services Inc. | Carter Lake Elementary School Hillside Elementary Schools Clarkmoor Elementary School Greenwood Elementary School Beachwood Elementary School New Tahoma High School The Evergreen State College | \$25M \$25M \$25M \$25M \$25M \$174M \$18M | GC/CM GC/CM GC/CM GC/CM GC/CM GC/CM GC/CM | PM PM PM PM PM PM PM | PM PM PM PM PM PM PM | PM PM PM PM PM PM PM |
| Tansy Shigley | Project Manager, OAC Services Inc. | Clarkmoor Elementary School Greenwood Elementary School Beachwood Elementary School New Tahoma High School | \$25 M \$25 M \$25M \$174M | GC/CM GC/CM GC/CM GC/CM | | | PM PM PM PM |
| Randy Barber, PE | Principal, OAC Services Inc. | Auburn High School Garfield Elementary School Olympia Regional Learning Academy | \$75M \$15M \$20M | D/B/B GC/CM GC/CM | PM PM PM | PM PM PM | |

ATTACHMENT C

