



EDMONDS SCHOOL DISTRICT

20420 68th Avenue West
Lynnwood, Washington 98036
(425) 431-7163 (425) 431-7171

Includes Brier, Edmonds, Lynnwood, Mountlake Terrace and Woodway

April 30, 2014

Mr. Bill Phillips
Program Supervisor
Engineering & Architectural Services
Department of Enterprise Services
PO BOX 41476
Olympia, WA 98504-1476

Subject: Alderwood GC/CM Application SUMMARY

Dear Mr. Phillips:

Edmonds School District plans to replace the existing 1965 Alderwood Middle School by moving the program to a newly constructed facility sharing the current Martha Lake Elementary School site. The Alderwood MS design concept, budget and schedule is based on the District's recent GC/CM project at Meadowdale Middle School. The new Alderwood facility will be approximately 100,000 square feet with a two story main classroom building adjacent to a one story Gymnasium, Library and Commons area. The project includes renovations of existing sports fields, site improvements for new sports fields, parking, bus and auto circulation, emergency vehicle access, neighborhood pedestrian connections and significant new storm water management facilities. The existing elementary school facility will remain occupied during the entire construction period, and the project will be constructed on the north half of the school site.

The Total Project Budget for this project is \$59,000,000 and the District has secured complete funding via a construction bond measure approved by District voters in February 2014. The District intends to complete construction in time to open the new school for students in September 2017. If the PRC approves this project for GC/CM Delivery, the District's schedule would be to select the GC/CM and have them involved early in the Schematic Design phase.

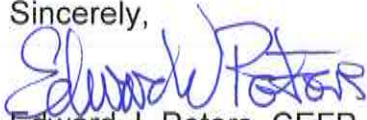
Use of the GC/CM contracting procedure is appropriate for the new Alderwood MS because the project involves complex scheduling, phasing, and coordination; it involves construction at an existing facility that must continue to operate during construction; involvement of the GC/CM is critical during the design phase; and, the project encompasses a complex and technical work environment.

The District has re-assembled the same team that managed, designed and advised the Meadowdale MS GC/CM project, and key individuals from that project will have the same roles on the Alderwood MS project. The Edmonds School District has been conducting major construction projects continuously for more than 20 years using its in-house Capital Projects

Office. Since 1988 the District has completed four new high schools, a new Middle School, three new K-8 schools, and three new elementary schools, conducted major modernizations and additions at twelve elementaries, and accomplished hundreds of systems and component upgrades around the District. The Capital projects Office has an experienced professional staff including a Director, three Design and Construction Managers, a Project Support Technician, and authority to hire additional Construction Coordinators and other support staff as the workload demands.

The Edmonds School District has no audit findings on any project identified in our response to Question 8 or any other construction matter.

Sincerely,



Edward J. Peters, CEFP
Capital Projects Director
Edmonds School District

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)
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

1. Identification of Applicant

- (a) Legal name of Public Body (your organization): [Edmonds School District #15](#)
- (b) Address: [20420 69th Avenue West, Lynnwood, WA 98036-7400](#)
- (c) Contact Person Name: [Edward J. Peters](#) Title: [Capital Projects Director](#)
- (d) Phone Number: [\(425\) 431-7170](#) Fax: [\(425\) 431-7171](#)
E-mail: peterse@edmonds.wednet.edu

2. Brief Description of Proposed Project.

Please describe the project in no more than two short paragraphs.
(See Attachment A for an example.)

[Edmonds School District plans to replace the existing 1965 Alderwood Middle School by moving the program to a newly constructed facility sharing the current Martha Lake Elementary School site. The Alderwood MS design concept, budget and schedule are based on the District's recent GC/CM project at Meadowdale Middle School and the same team is conducting the project. The new Alderwood facility will be approximately 100,000 square feet with a two story main classroom building adjacent to a one story Gymnasium, Library and Commons area. The project includes renovations of existing sports fields, site improvements for new sports fields, parking, bus and auto circulation, emergency vehicle access, neighborhood pedestrian connections and significant new storm water management facilities. The existing elementary school facility will remain occupied during the entire construction period, and the project will be constructed on the north half of the school site.](#)

3. Projected Total Cost for the Project:

A. Project Budget

Costs for Professional Services (A/E, Legal etc.):	\$5,570,000
Estimated project construction costs (including construction contingencies):	\$41,225,000
Equipment and furnishing costs:	\$2,000,000
Off-site costs:	\$500,000
Contract administration costs (Owner, CM etc):	\$2,630,000
Contingencies (design & owner):	\$2,100,000
Other related project costs (Good and services outside GC, Permits):	\$958,875
Sales Tax:	\$4,016,125
Total:	\$59,000,000

B. Funding Status

Please describe the funding status for the whole project.

Note: If funding is not available, please explain how and when funding is anticipated

The voters of the Edmonds School District already have approved the full funding, \$59,000,000, for the Alderwood MS project as part of the 2014 construction bond measure.

The District is in the process of selling the first set of bonds, which will cover the entire cost of this project and several others.

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.)

Activity	Planned Start	Planned Completion
Voters Approve Bond	2/14/2014	2/14/2014
Pre-Design	3/3/2014	7/3/2014
Procure GCCM Services	5/1/2014	8/15/2014
Schematic Design	7/5/2014	11/1/2014
Design Development	11/1/2014	2/27/2015
Early Site/Steel Design	11/26/2014	5/1/2015
Final Construction Documents	2/27/2015	11/25/2015
Early Site/Steel Bidding	6/15/2015	10/5/2015
Final Bidding Package	2/29/2016	5/2/2016
Early Site Construction	5/30/2015	11/23/2015
Complete Construction	5/2/2016	9/1/2017
Occupancy		9/1/2017

Please refer to Attachment A: Construction Schedule

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

N/A

5. Why the GC/CM 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:

- If implementation of the project involves complex scheduling, phasing, or coordination, what are the complexities?

The schedule for the Alderwood Middle School replacement project interconnects with multiple commitments the Edmonds School District has made for its 2014 bond program:

- **The new Alderwood Middle School site is shared with the occupied Martha Lake Elementary School.** The challenges of a site occupied by an elementary school can be mitigated by using the GC/CM process and, in particular, can best be met through the cooperation, planning and experience of the GC/CM as a team member during the design phase.
- **Expanding classroom space and providing a commons at the existing Martha Lake Elementary, which will share the site with the new Alderwood MS.**

Martha Lake El. is one of more than a dozen elementary schools that the District will be expanding under the bond program. The need to expand arises from both enrollment growth in the NE area of the District and State funding of full-day kindergarten and reduced class sizes. The District is exploring opportunities for the two schools to share programs and efficiencies. Both the Martha Lake El. expansion and the new Alderwood MS need to be constructed as soon as possible. The design, scheduling and procurement processes for these two projects need to be closely coordinated to avoid conflicts and delays caused by interference between work at both schools.

- **Providing an interim site for other Replacements and Modernizations/Expansions.** The 2014 bond program also includes projects to replace, or, expand and modernize five other schools. A number of these sites present serious challenges to constructing a new school or major modernization/addition while keeping the existing facility operational. The District has no vacant sites. The Old Alderwood MS will serve as an interim site, once the new facility is complete and occupied. It is therefore important for the scheduling of the other projects that the existing Alderwood site be available as early as possible to allow those projects to proceed on the schedule and have additional classroom capacity available when needed.
- **Moving Alderwood MS students into an educationally appropriate and functionally ample structure as soon as possible.** In conjunction with its 2006 bond program the School District presented a plan to the voters to replace Alderwood Middle School by 2013, using funds from the lease and sale of surplus District property. The downturn in the national economy delayed those real estate transactions, and the District eventually proposed a project funded by a new bond, which the voters approved. There is a strong community sentiment that the new school is overdue. It is therefore important that the project proceed with the expedience that the GC/CM process supports.

The District and its consultants have developed a feasible schedule for opening the new Alderwood MS by the Fall of 2017, which would allow the District to meet the other commitments described above. However this schedule is tight, and there are a number of challenges to meeting it. Snohomish County has told us that they are experiencing significant delays in processing land use matters because they have limited staff and are experiencing a large increase in development activity. They will not commit to a schedule but have advised us to expect that it will take a year or more to process the conditional use permit. Such a permitting duration for planning approval would jeopardize the schedule, especially if we pursue early bid packages for sitework and structural steel.

A further permitting complication is that the County has determined that Larch Road, the arterial serving the site, is “near failure”. Topography and limited right-of-way complicate mitigation. The nature and extent of the traffic mitigation measures the School District will be required to provide will be determined by process that does not yet have a definite timeline. The School District is working to expedite matters with the County but, thus far, there is no clear resolution. The schedule is also complicated by the traffic impacts of construction on the elementary school which shares the same site (see below).

An appropriate strategy for handling this schedule complexity and uncertainty is to develop a set of schedule scenarios based on realistic construction activities, sequences, durations and interdependencies, and, driven by different permitting timelines. These scenarios can guide real-time decision making by presenting the consequences of particular scheduling circumstances. Such an approach will be most useful if it is created early in the design process and has both the expertise and the commitment of the contractor who will execute the work.

- 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?

Note: 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.

As mentioned above, the new Alderwood Middle School will abut the existing Martha Lake Elementary and may share programs and facilities. Martha Lake El. will remain in operation throughout construction of both the new Middle School and its own expansion. Middle School construction activities will occur on the current elementary school sports field and will interrupt key student pedestrian access (refer to graphic). The contractor will need to keep all staging and worker parking on the site. Construction likely will be phased to include early site work before building construction and sports field establishment and restoration after the Middle School is occupied. The GC/CM approach was critical to maintaining student safety on our previous Meadowdale MS project and will be equally critical in this situation.

Construction of the new Alderwood Middle School also will disrupt recently installed traffic mitigation measures that are critical to the safe operation of Martha Lake Elementary. Traffic management and student safety at Martha Lake El relies upon a new paved pedestrian path, a new remote parent parking lot and a long-established pedestrian link through woods. All three of these traffic management features are on the new Alderwood MS site and will be disrupted by construction. (refer to graphic) The School District recently completed a \$750,000 project to install the pedestrian path, remote parent parking lot and other features to mitigate severe congestion and safety concerns, including blockage of the arterial serving the area, Larch Road. The decrease in State support for bus transportation has led to a rapid increase in parent vehicle traffic at Martha Lake Elementary. This increase overwhelmed the ability of the adjacent arterial and the on-site circulation to handle parent traffic. Through traffic on Larch Road was completely blocked during school dismissal. The mitigation measures have greatly improved this situation, in part by providing better pedestrian and vehicle access at the North end of the combined site.

The School District and its design team are developing traffic management plans for both the construction and long-term operation of the Martha Lake/ Alderwood MS site. Implementation of the traffic plan during the construction phase will benefit from early contractor involvement in the design process and on-going administration. During the design process it is easier and more cost effective to work with the GC/CM to identify and resolve potential traffic conflicts for the construction process.

- If involvement of the GC/CM is critical during the design phase, why is this involvement critical?

The Edmonds School District intends to continue its long record of innovative high performance school design on the Alderwood MS project. In the late 1990's, prior to the adoption of the first LEED guidelines, the School District used an early draft of those guidelines to set goals and design standards for the new Terrace Park and Maplewood K-8 schools. The District's team designed the new Lynnwood High School to improve upon the Washington State Energy code by 50%, and that facility remains the largest passively ventilated public school building in the State. Meadowdale MS uses a hybrid variation of the Lynnwood HS system. All of these projects pioneered the use of a number of sustainable products, equipment types, and design solutions that were new to the District. Implementation of these innovative systems and approaches benefit dramatically from contractor input during design.

The Alderwood MS project will further the District's commitment to improving instructional technology, functionality, durability, maintainability, and energy efficiency. There have been significant code changes and technological/material developments since Meadowdale MS was designed. The District and its design team

will be investigating the feasibility and cost-effectiveness of unconventional HVAC systems, building envelope designs, stormwater management techniques, on-site power generation, and other features.

Our experience with the Terrace Park K-8, Maplewood K-8, Lynnwood HS and Meadowdale MS projects is that these commitments to high performance school design require the use of new technologies that have unexpected impacts on the design, construction, commissioning and closeout. Having the contractor's perspective on these products and systems during the design phase helps mitigate these impacts during and after construction by allowing better coordination and detailing during design. It also would expedite commissioning and the close-out process.

For example, at Lynnwood HS, a Design-Bid-Build project, the same two-story shafts provide airflow for the natural ventilation system and illumination for the daylighting system, both of which reduce energy usage. Although these energy saving systems are a primary responsibility of mechanical and electrical engineers, the design and construction of these chimneys required non-conventional solutions and special coordination during the construction phase among the architects, structural engineers, steel fabricators, framers and roofers. Gaining understanding of the permitting authorities for these solutions was a challenge. This coordination could have been much more effectively realized with contractor input during the design phase. There are numerous other examples of energy efficiency and sustainability features that cross the boundaries of both design and construction disciplines. Our experience indicates that the GC/CM could have assisted us significantly in that process, and will assist us with similar situations on Alderwood MS.

Although the proposed site may have seemed generous when the School District purchased it more than 50 years ago, all of the buildable areas carry multiple challenges. For example, there are several wooded areas on the site totaling about nine acres of varying topography. Neighboring residential areas are accustomed to having these wooded areas as buffers and local recreation sites. As mentioned above, the District is using portions of the MS site to mitigate traffic issues for the elementary school and plans to use the current elementary playfield for new structures and/or construction staging.

The School District has stored a large stockpile of excess soil generated from the Lynnwood HS project on the new Alderwood site. This stockpile covers nearly a half-acre near the principal street access for the site. The stockpile will have to be moved to construct the new school. The District has evaluated using this stockpile on previous projects and has determined that the feasibility of reuse is highly sensitive to contractor's means and methods, as well as to volatile market conditions. Economic disposition of this material, perhaps through a phasing plan, would most easily be accomplished by involving the GC/CM in planning the site design.

Balancing the challenges of topography, woods, neighbors, traffic etc., to fit the facility on the site in a functional manner will require considerable design judgment. Based on our experience with similar sites, it will be highly cost effective to get the contractor's evaluation of different potential solutions during the design phase. Sitework tends to be one of the riskiest components of any school project and can have a ripple effect on both schedule and budget.

- If the project encompasses a complex or technical work environment, what is this environment?

See Design Phase involvement discussion above

- 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?
N/A
- If the project is declared heavy civil and the public body elects to procure the project as heavy civil, why is the GC/CM heavy civil contracting procedure appropriate for the proposed project?
N/A

6. Public Benefit

In addition to the above information, please provide information on how use of the GC/CM 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.
- In the case of heavy civil GC/CM, why the heavy civil contracting procedure serves the public interest

Fiscal Benefit – Beyond the obvious benefit of obtaining a contractor’s opinion of cost earlier in the project is the benefit from focusing on how to minimize or eliminate construction phase risks. For example, phasing and scheduling challenges tend to create the perception of greater risk by subcontractors in a design-bid-build environment, which is reflected in their bids. The GC/CM method can produce both a real and perceived reduction of that risk, and, thus, a fiscal benefit. Real reduction in risk on this project will result from the GC/CM’s involvement in locating and configuring the buildings, utilities and related features, packaging sub-contract work, and preparation of a workable staging plan and schedule. Also, the GC/CM can reduce perceived risk to bidders from the District’s design and quality standards by reviewing design details, specification language and other features of the bid plans. This review translates into higher quality of construction and reduced maintenance and operations costs to the community. Finally, GC/CM offers better cost control to protect not just the project budget, but also to the overall bond budget for all projects. Based on our experience with GC/CM on the Meadowdale MS project we expect to manage cost-risk early in the project and, thus enhance the District’s ability to complete other projects promised in the bond proposal.

In addition, the GC/CM process will provide a fiscal benefit in other vital ways: (1) The efficiency of the GC/CM process expedites construction and brings this much needed replacement school into use sooner, and thus at a lower cost, and provides immediate benefit to the students, families, faculty and staff and the community; (2) These efficiencies translate into reduced expenditure of public funds through better fiscal management and scheduling control; (3) Construction managed by this process takes advantage of the current favorable construction climate to again reduce construction cost; and (4) the GC/CM process provides better control of safety on an occupied site.

7. Public Body Qualifications

Please provide:

- A description of your organization’s qualifications to use the GC/CM contracting procedure.

The Edmonds School District has assembled the same team of experienced professionals that successfully managed, designed, and advised on the construction of Meadowdale Middle School via the GC/CM delivery method. For Alderwood Middle School, Edward Peters, District Capital Projects Director, who led the Meadowdale

project, will direct the effort from start to finish. Integrus will provide planning, design and construction administration services using the same individuals in the same roles they served on Meadowdale. Hainline will review and advise the District on GC/CM process and contract and will assist with specific issues as they arise; they have assigned the same individual, Charles Hartung, who worked with the District on Meadowdale. Perkins Coie, which has significant experience on GC/CM projects, will provide legal counsel, again using the same individuals as on Meadowdale.

All parties involved with the Meadowdale MS GC/CM project consider it an outstanding success. The District not only completed the project ahead of schedule and under budget, but experienced significant improvement in student learning and behavior. The District was extremely pleased with the safety of the construction process on an occupied site. The quality of construction is superior to the District's experience with D-B-B and this higher quality has reduced maintenance and custodial workloads. Both Integrus Architecture and Skanska, the GC/CM, regularly cite Meadowdale as a reference when pursuing other GC/CM opportunities.

The Edmonds School District has been conducting major construction projects continuously for more than 20 years using its in-house Capital Projects Office. Since 1988 the District has completed four new high schools, a new Middle School, three new K-8 schools, and three new elementary schools, conducted major modernizations and additions at twelve elementaries, and accomplished hundreds of systems and component upgrades around the District. The Capital projects Office has an experienced professional staff including a Director, three Design and Construction Managers, a Project Support Technician, and authority to hire additional Construction Coordinators and other support staff as the workload demands.

- 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.)

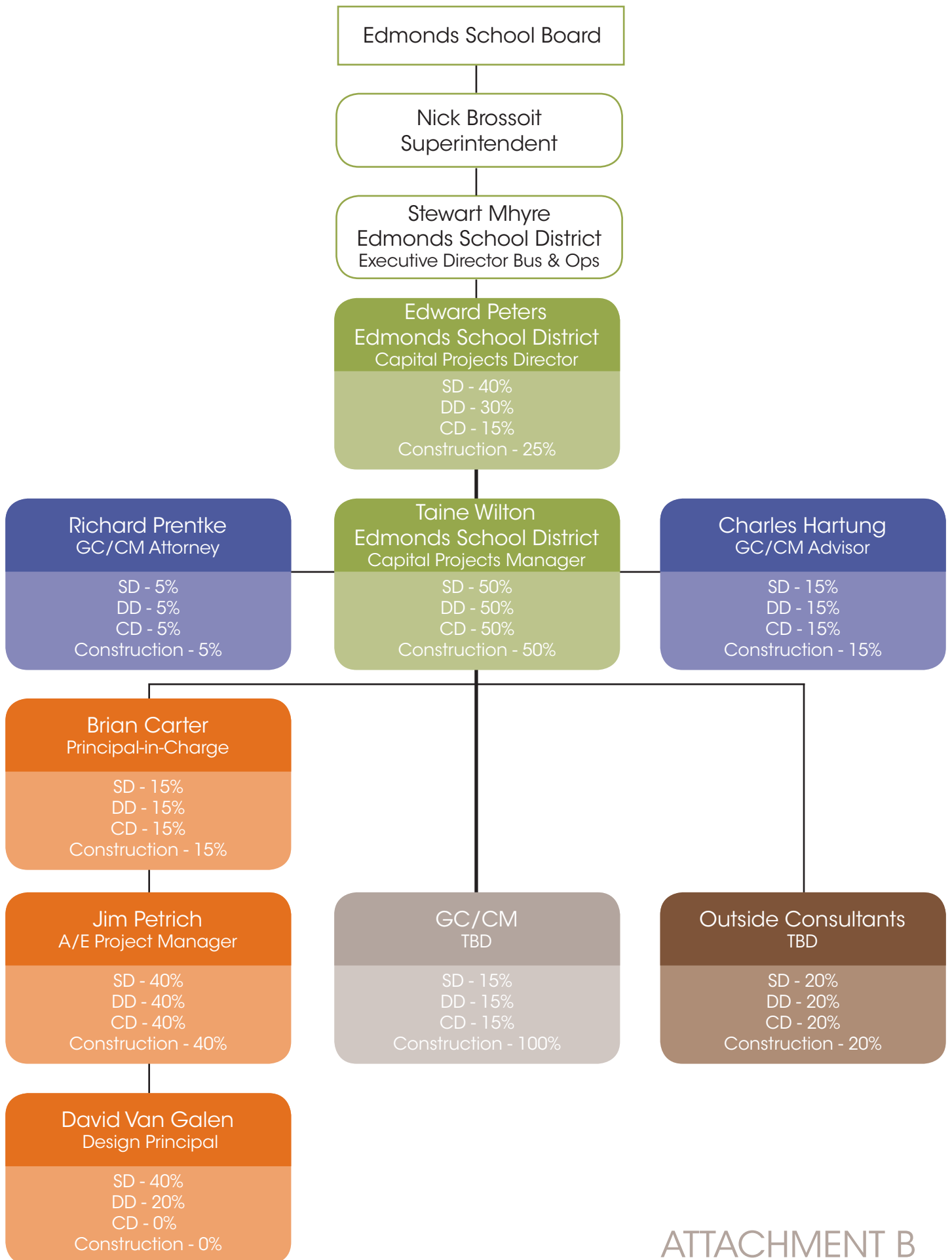
Please refer to Attachment B: Organizational Chart

- Staff and consultant short biographies (not complete résumés).

EDMONDS SCHOOL DISTRICT

Edward Peters, CEFP, Capital Projects Director

Mr. Peters has directed the Edmonds SD construction program since 1999. To date this ESD work totals more than \$425m in projects, not including the current \$275m bond program. He directed all aspects of the Lynnwood High School and Meadowdale Middle School Replacements. Meadowdale MS, completed in 2011, was the District's first GC/CM project and Mr. Peters served as Project Manager for the Planning and Design phases, developed and negotiated the GC/CM contract, and attended all weekly job-site meetings during construction. He held an equivalent position with Mount Vernon School District and has more than 20 years' experience managing school facilities projects. He chaired the citizen's Oversight Committee for Seattle Public Schools "Building Excellence" construction program for ten years. In that role he monitored all phases of the following GC/CM projects and participated in executive session discussions of potential disputes: Nathan Hale Performing Arts Center, Roosevelt HS, Cleveland High School, Garfield HS, Nathan Hale HS Modernization and Addition, and Denny Middle School/ Sealth High School. He is Washington State Governor and past Chapter President of the Council of Educational Facilities Planners International. Mr. Peters has made numerous presentations and conducted seminars on GC/CM for school projects, and will be taking the AGC's GC/CM Delivery class in June 2014.



Taine Wilton, AIA, LEED AP, Capital Projects Manager

Taine Wilton is a registered architect with 29 years of industry experience with both public and private projects specializing in K-12 projects, managing design through construction administration. Prior to joining Edmonds School District she operated her own firm for three years as managing principal, in charge of all phases of work from marketing, contracts, pre-design, through construction administration, and business administration. The architectural firm operated profitably through the downturn in the economy. Prior to that, she was principal of a medium size architectural firm managing all aspects of the firm, specializing in design firm leadership and management. Her involvement with new and renovation projects in the public sector gave her broad knowledge of school districts and higher education, working within board approval dates, school schedules, and budgeting. Her private projects using Negotiated Bid Delivery include a Medical/Dental facility and an Institutional/Church facility. For these projects Ms. Wilton created the RFQ, interviewed and selected contractors and managed their pre-construction activities.

Taine's architectural experience covers design, project management, and construction administration on a variety of public projects including: The Ethnic Cultural Center – University of Washington; Rainier Beach High School Master Planning and Modernization, Ingraham High School International Baccalaureate Program Modernization; Broadview Thomson K-8 Renovation and Reroof, Orca at Whitworth Modernization and Greenhouse Science and Garden project– Seattle Public Schools; Cascadia New Elementary School – Ferndale School District; Fine Arts Reroof, Buchanan Towers Residential Hall Safety Upgrades, Biology Research Facility – Western Washington University; Building C Reroof – Cascadia Community College, to list a few.

Ms. Wilton will be taking the AGC's GC/CM Delivery class in June 2014.

INTEGRUS ARCHITECTURE

Brian Carter, AIA, CEFP, LEED AP, Principal-in-Charge

As leader of the K-12 Education group at Integrus Architecture, Mr. Carter has extensive GC/CM experience, most recently on the Vashon High School Additions and Renovations project, two elementary school projects on Joint Base Lewis McChord for Clover Park School District, Rush Elementary School in Redmond, WA for the Lake Washington School District and previously Meadowdale Middle School in Lynnwood, WA for the Edmonds School District. He is responsible for overseeing the production of all projects phases-and has led many large, complex, and phased occupancy school projects in recent years. Brian is familiar with the issues involved in alternative delivery methods outside of the usual design-bid-build process and understands the benefits of GC/CM such as early collaboration between the owner, the design team, and the construction team. Brian also is a longstanding executive member of the Technical Advisory Committee at OSPI and has participated actively in efforts to integrate the GC/CM model into OSPI's school construction assistance funding process (D forms, etc). His direct GC/CM project experience includes the following projects:

Vashon High School Additions and Renovations
Clarkmoor ES
Greenwood ES,
Rush ES,
Elysian K-8
Meadowdale Middle School
WCCW 256-Bed Housing Phase 3

Jim Petrich, AIA, LEED AP, A/E Project Manager

Mr. Petrich is currently the Project Manager for the Alderwood Middle School. His most recent GC/CM experience is on Vashon Island High School Additions and Renovations. He is responsible for coordinating and managing design consultants, documentation production and, later in the project, the construction administration. He completed the GC/CM project of Meadowdale Middle School in Lynnwood WA for Edmonds School District. Previously, he was a Project Manager for the DLR Group for two GC/CM projects for the State of Oregon costing \$97 million and \$120 million each. His direct GC/CM project experience includes the following projects:

Vashon High School Additions and Renovations
Meadowdale Middle School
Deer Ridge Correctional Facility
Coffee Creek Correctional Facility

David Van Galen, AIA, LEED AP, Design Principal

Mr. Van Galen is currently Lead Designer for the Alderwood Middle School. He held the same role for Vashon Island High School project and is responsible for developing design concepts and carrying them through to completion. He has worked on several GC/CM projects, including Meadowdale Middle School, UW Paul G. Allen Center, UW New Business School and WSU Intercollegiate Center of Nursing. His talent and design sensitivity are enhanced by his ability to translate clients ideas and concerns into building designs. David brings not only his extensive, creative talent, but also a great deal of experience working with public clients and the community. His design approach to GC/CM projects includes early, extensive interaction with the GC/CM cost estimating team. His GC/CM experience includes the following projects:

Vashon High School Additions and Renovations
Meadowdale Middle School
WSU Intercollegiate Center of Nursing

HAINLINE AND ASSOCIATES, INC. - GC/CM Advisor

Charles M. Hartung AIA, GC/CM Advisor

Mr. Hartung has over 40 years of experience in architecture, project management, construction management and construction consulting for both public and private projects. He advised the Edmonds School District on all aspects of the GC/CM process for Meadowdale Middle School. His architectural experience includes direct responsibilities as project architect, project manager, drawings and specifications preparation; phase planning, value engineering, cost and change analysis, contract preparation and negotiations. He has served directly for public Owners as Project Manager and/or Owner's Representative on complex multi-million dollar projects. Through those roles, he has developed a thorough understanding of management and decision processes as they pertain to design and construction.

Mr. Hartung has provided constructability review services on three Edmonds School District projects: Meadowdale Middle School, Lynnwood High School and the District Support Center. He served as a construction manager for the 100,000 sq. ft. Fantasy Springs Special Event Center, a GMP project completed in 2005, providing value engineering, and contract negotiating and construction management services. He was part of the owner's dispute resolution team for the Bellevue City Hall GC/CM project providing change analysis. He served as the Project Manager for the Washington State Convention and Trade Center 800 Pike Project, a \$25 million dollar GC/CM project and recently served as the owner's consultant on two Bethel School District alternative delivery method projects. In addition, he continues to provide design / construction consulting including design and constructability review services to public and private clients.

PERKINS COIE - ATTORNEY

Richard Prentke, GC/CM Attorney

Richard O. Prentke will be legal counsel to the School District for the project, the same role he had for Meadowdale Middle School. He is knowledgeable and has a great deal of experience in design and construction contracting and procurement processes for public construction as well as private construction using GC/CM processes. Mr. Prentke is a partner in the Seattle office of Perkins Coie and chair of its national construction practice. He has practiced with the firm for three decades. Mr. Prentke and his colleagues have represented public entities in hundreds of Washington projects. He has been involved with two of the largest "Alternative Public Works" projects in the state, serving as construction counsel to the Seattle Symphony for its design/build Concert Hall project in downtown Seattle and to the Seattle Mariners for their GC/CM stadium project. He has also represented private owners in billions of dollars of private GC/CM contracts. Representative public transactions in which he has been involved include: Mr. Prentke is listed in the Best Lawyers in America, Washington Super Lawyers, Puget Sound Top Business Lawyers, Who's Who in American Law, Seattle Metropolitan "Best Lawyers," and other recognitions. He has been an arbitrator with the American Arbitration Association and the King County Superior Court. He is a member of the ABA Construction Law committee and a former board member of the Washington State Bar Association's Public Procurement and Construction Law Section. He is a frequent speaker on construction law issues, is often involved in legislative matters relating to construction, and is editor of the School Construction Law Deskbook.

- Provide the ***experience and role on previous GC/CM projects*** delivered under RCW 39.10 or equivalent experience for each staff member or consultant in key positions on the proposed project.

(See Attachment D for an example.)

[See Matrix and Staff biographies](#)

- The qualifications of the existing or planned project manager and consultants.

[See Matrix and Staff biographies](#)

- If the project manager is interim until your organization has employed staff or hired a consultant as the project manager indicate whether sufficient funds are available for this purpose and how long it is anticipated the interim project manager will serve.

N/A

- A brief summary of the construction experience of your organization's project management team that is relevant to the project.

[See Matrix and Staff biographies](#)

- A description of the controls your organization will have in place to ensure that the project is adequately managed.

The district has established pre-design, design and construction phase procedure manuals that staff and the project team utilize to provide consistency of practice across all GC/CM projects. This manual was developed by the District with input from Perkins Coie and Hainline. In addition, project controls include a Project Financial Management System (contracts, invoices, budgets, and change orders) managed by the project manager that operates in concert with the District's financial system. Templates for the master schedule and standardization of the construction schedule format provides additional management tools. Collaborative communication tools for the pre-construction and construction phases include Microsoft SharePoint Services which allows detailed collaboration and automatic updating of key documentation logs, which can be accessed by the entire project team. The management team also

Team Experience and Role on GC/CM Projects Matrix

GC/CM Projects School District (SD) Project cost/ year complete	Alderwood M. S. Edmonds SD \$59.0 M/2017	Meadowdale M. S. Edmonds SD \$50.2 M/2011	Vashon H. S. Vashon S.D. \$34.0 M/2014	Meriwether E. S. Clover Park SD \$24.3 M/2014	Rainier E. S. Clover Park SD \$26.2/2014	Rush E. S. Lake Washington SD \$24.5 M/2013
Name/Role	Capital Projects Dir.	Capital Project Dir.				
Edward Peters	Capital Projects Dir.	Capital Project Dir.				
Taine Wilton	Capital Projects PM					
Brian Carter	PIC	PIC	PIC	PIC	PIC	PIC
Jim Petrich	PM	PM	PM			
David Van Galen	DP	DP	DP	DP	DP	DP
Richard Prenke	Legal counsel	Legal counsel	Legal Counsel			
Charles Hartung	GC/CM Advisor	GC/CM Advisor				

PIC = Principal in Charge

PM = Project Manager

DP = Design Principal

employs use of an electronic file system to store and access data and documents quickly.

The Project Manager maintains daily contact with the district's Capital Projects Director to discuss project issues, workloads, financial and performance status, and decisions that need to be made. Directives for changes will be approved expediently by the District. The roles and responsibilities of the District, Architect and their design consultants, and the GC/CM will be established in a matrix of responsibilities that will be published with the GC/CM RFP and other GC/CM contract documents. The Project Manager monitors the various activities and the deliverables established in the matrix and keeps the appropriate party on point for their respective work throughout the life of the project.

Adherence to the established scope, phasing of the work and budget will be paramount in the management and control of the project. Construction cost estimates by the Architect and the GC/CM contractor are reconciled at the end of each design phase. Value engineering and constructability reviews will be ongoing and are an established agenda item in coordination meetings. Market prices will be monitored for impacts to the current estimates. Once the Maximum Allowable Construction Cost (MACC) is negotiated after the 90% construction documents are in place, the GC/CM, Project Manager and Hainline will evaluate the construction documents to determine if there are any changes that impact the agreed upon MACC. If so, then these changes will be brought back in line with the budget and the established MACC. At intermediate reviews of the construction documents, the design team will be required to provide a list of changes/further development of design from the previous submittal as a means to identify and control scope that is not part of the GMP.

At completion of the construction documents, the GC/CM is required to review the specifications and the drawings to determine if there are any changes that may have been incorporated and to re-confirm the MACC and the Total Construction Cost.

As part of the pre-construction services the GC/CM will develop a subcontracting bid plan and schedule for bidding as well as for phased construction and early procurement as necessary. The Architect's design deliverables will be integrated with the GC/CM bidding and construction plan. Early and frequent meetings with the county permit agencies, fire department, and other code officials prior to permit intakes will help ensure that the permit comment requirements that may affect the MACC will be mitigated. The team also will consider the potential benefits associated with engaging an MCCM or ECCM, and/or prequalifying certain major subcontractors.

- A brief description of your planned GC/CM procurement process.
 1. Issue and publically advertise RFQ after receiving GC/CM approval by the PRC. Market the project to the construction community.
 2. Hold a pre-RFQ submittal conference at school site and issue addendum, if needed.
 3. Shortlist firms for an interview and pricing proposal
 4. Issue RFP, interview instructions and GC/CM contract document to firms selected for interview. Request comments and feedback prior to interview date. Issue addendum, if needed.
 5. Interview firms and receive proposal.
 6. Evaluate interviews and proposals and determine highest scored firm.
 7. Negotiate contract for pre-construction services with the highest scored firm.
 8. Submit recommendation for selection and award to School Board.
 9. Approval by School Board on recommendation.
 10. Issue Notice to Proceed with Preconstruction.

- Verification that your organization has already developed (or provide your plan to develop) specific GC/CM or heavy civil GC/CM contract terms.

The District will use forms similar to those previously developed for the Meadowdale Middle School project. For that project, Dick Prentke of Perkins Coie drafted revisions to the AIA's standard forms A121-2003 Agreement and A201-1997 General Conditions. Those revisions provided compliance with Washington State law and School District policies and procedures. These AIA forms have been updated to the current A133-2009 Agreement and the A201-2007 General Conditions. Mr. Prentke has prepared similar contracts based on these AIA forms for many other Washington school districts and public agencies using the GC/CM method.

Also at that time Division 0 and Division 1 documents for the Edmonds School District Specifications were modified to address requirements and issues specific to the GC/CM alternate procurement method. Those documents received input from both Richard Prentke and Charles Hartung.

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: (See Attachment 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 C: Construction History

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 Attachments
 D: Existing Site Layout,
 E: Natural Site Features,
 F: Existing Site Access and Conditions,
 G: Remaining Buildable Area, and
 H: Potential Building Massing and Form

10. Resolution of Audit Findings On Previous Public Works Projects

If your organization had audit findings on any project identified in your response to Question 8, please specify the project, briefly state those findings, and describe how your organization resolved them.

The Edmonds School District has no audit findings on any project identified in our response to Question 8 or any other construction matter.

Edmonds School District - Construction History (6 years)

Project #	Project Name	Project Description	Contracting Method	Planned Start	Planned Finish	Actual Start	Actual Finish	Planned Budget	Actual Budget	Reason for Budget or schedule overrun
1	Meadowdale Middle School	New 2 Story - 98,990 SF Middle School	GC/CM	Sep-07	Sep-11	Sep-07	Sep-11	\$42.2M	\$41.3M	N/A
2	Lynnwood High School	New 2 story - 214,182 SF High School	D-B-B	Jul-04	Nov-11	Jul-04	Nov-11	\$100.0M	\$100.0M	Theater completion delayed via agreement with Contractor
3	Levy Projects	Multiple Building and System Upgrades e.g. Mechanical HVAC and DDC Control Replacements, Roofing and Envelope Upgrades, Lighting Upgrades, Traffic and Pedestrian Safety Upgrades	D-B-B	Mar-04	Aug-18	Mar-04	-	\$41.0M	-	N/A

Caution to Applicants

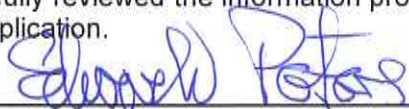
The definition of the project is at the applicant's discretion. The entire project, including all components, must meet the criteria to be approved.

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 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 process. You also agree that your organization will complete these surveys within the time required by CPARB

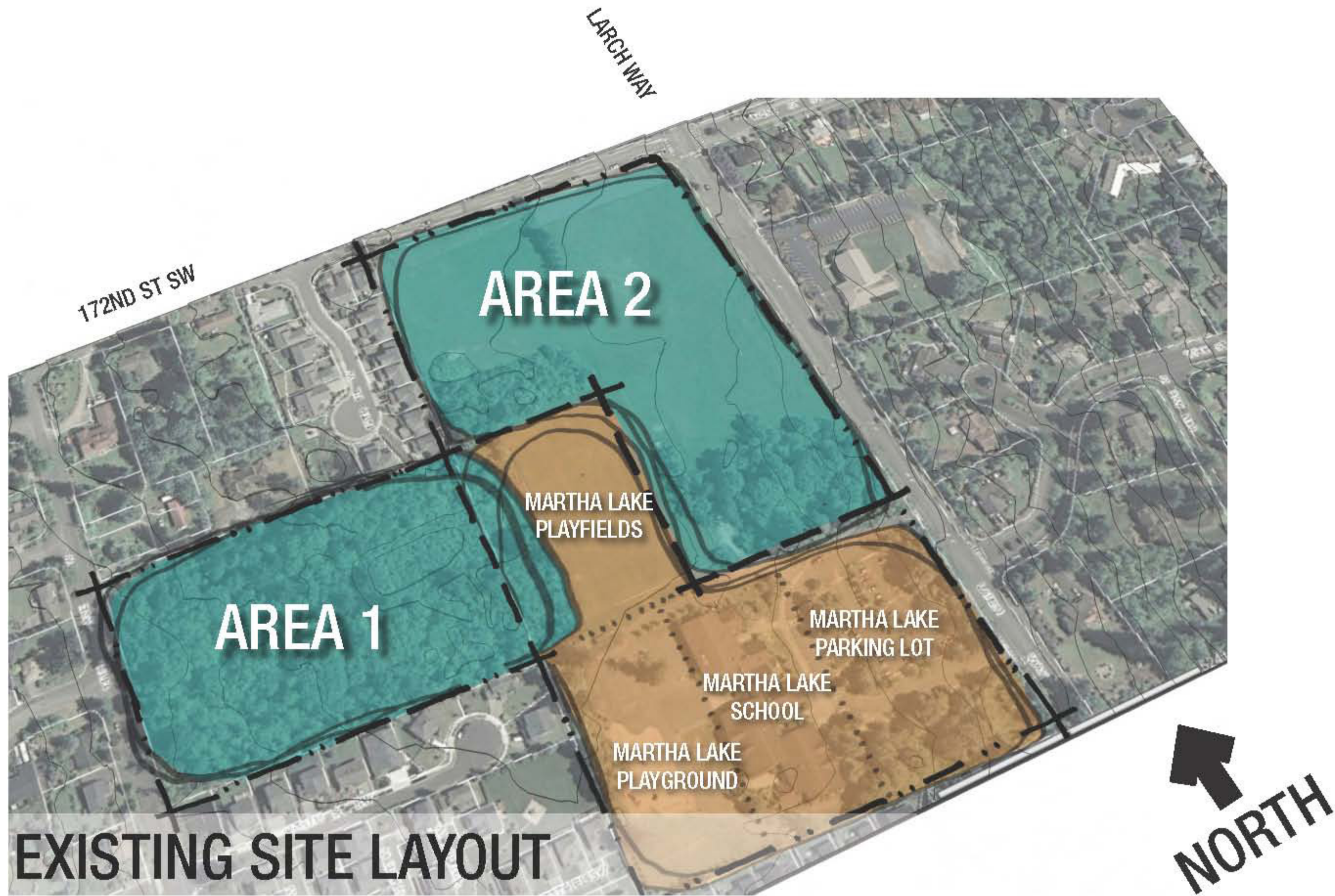
I have carefully reviewed the information provided and attest that this is a complete, correct and true application.

Signature:  _____

Name: (please print) Edward J. Peters

Title: _____ Capital Projects Director

Date: _____ April 30, 2014







- PRIMARY BUILDABLE ZONE
- SECONDARY BUILDABLE ZONE
- UNBUILDABLE ZONE

