



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

**Application for Certification of a Public Body
GC/CM Delivery**

**Submitted by
Lake Washington School District
May 2, 2016**

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

APPLICATION FOR CERTIFICATION of PUBLIC BODY
RCW 39.10 Alternative Public Works Contracting- GCCM

The CPARB PRC will only consider complete applications. Incomplete applications may delay action on your application. Responses to Questions 3-10 should not exceed 15 pages (font size 11 or larger).

1. Identification of Applicant

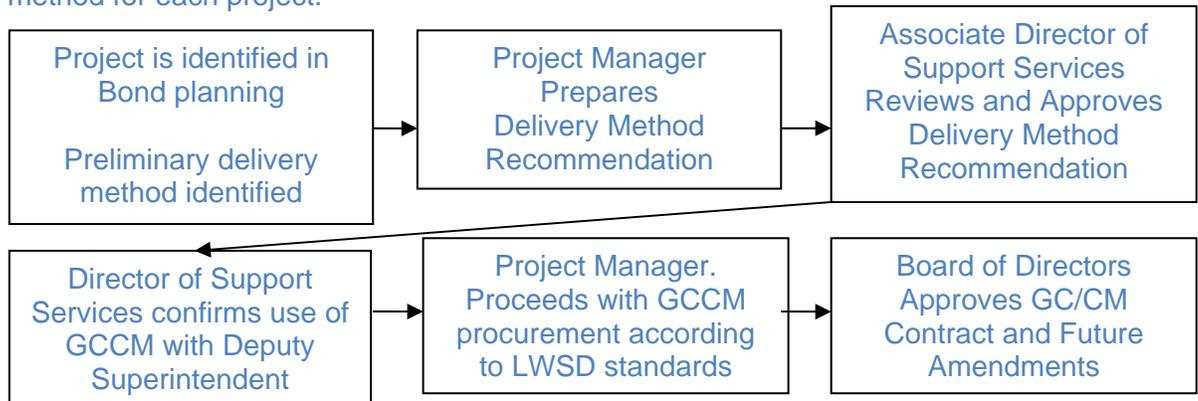
Lake Washington School District
Mr. Forrest Miller CFM, REFP, EFM
Director of Support Services
Lake Washington SD Support Services Center
15212 NE 95th St
Redmond, WA 98052
fmiller@lwsd.org, 425.936.1100

2. Experience and Qualifications for Determining Whether Projects Are Appropriate for GCCM under Alternative Contracting Procedure (RCW 39.10.270 (2) (a).) Limit response to two pages or less. (See attached example of a public body's internal project approval flow chart)

Please submit a process chart or list showing: (1) The steps your organization takes to determine that use of the procedure is appropriate for a proposed project; and (2) The steps your organization takes in approving this determination. Also submit the written guidelines or criteria that your organization uses in determining whether this alternative contracting procedure is appropriate for a project.

RESPONSE:

The flow chart below illustrates the LWSD process for determining appropriate delivery method for each project.



See Delivery Method Recommendation—Attachment A

3. Project Delivery Knowledge and Experience (RCW 39.10.270 (2)(b)(i).) Limit response to two pages or less.

Please describe your organization's knowledge and experience in delivering projects over the past 10 years, including the complexity of projects your organization built. Describe delivery methods, management structures, and project controls utilized.

KNOWLEDGE AND EXPERIENCE

The Lake Washington School District has successfully completed 25 major capital projects valued at \$700 million since 2000, among the largest public builders in the State of Washington. 19 of the 25 projects were constructed on occupied school sites and three projects were delivered using GC/CM. LWSD delivered one of the first K-12 GC/CM projects, Mann Elementary in 2003 under a pilot program. Through this experience, the District has developed the institutional knowledge and staff capabilities to successfully deliver projects using the GC/CM method in compliance with RCW 39.10 and recognized best practices.

The District also executes 50-100 maintenance, interior renovations, portable classrooms and similar projects each year valued at \$10-\$20 million. Typically funded through levies, virtually all small capital projects are executed on existing occupied sites. These projects maintain the District's 3.5 million square feet of inventory, adapt buildings to changing curriculum needs and provide short-term expansion capacity.

The District has successfully employs design-bid-build, GC/CM, small-works contracting, Job Order Contracting (JOC) and Energy Services Company (ESCO) based on the size, complexity and statutory limitations of each project.

The District maintains a robust and experienced internal capital facilities staff of executive, financial, risk management and administrative experts augmented with project management consultants and legal professionals to provide scalable, highly flexible and responsive solutions for its project delivery needs.

MANAGEMENT STRUCTURES

Authorization and funding for school construction and maintenance projects is through voter-approved bonds and levy measures. Bond resolutions detail the planned projects, the overall budgets, and the general timelines and authorized uses of bond proceeds. Bond resolutions are prepared and voted on by the Board of Directors. Board Resolution No.2205 was authorized by the Board on January 11, 2016 and approved by voters by a 66% margin on April 26, 2016 funding \$398 million in new capital projects. The current Board President **Nancy Bernard** has served on the Board for the past 19 years.

Capital projects are planned and directed by the Operational Services Division. This division is headed by Deputy Superintendent, **Janene Fogard**. Janene oversees the long term planning for enrollment, capacity, and information technology, delivery method determination among other duties. Janene is a 34 year veteran of the District with 16 years in her role as Deputy Superintendent.

Direct management of capital projects including execution strategy, contracting, design and construction is led by Director of Support Services, **Forrest Miller**. Forrest directly oversees the selection of consultants, the design of each facility, delivery method decisions, procurement of contractors, scheduling, budget allocations, and design standards among other duties. Forrest has 24 years with the District including 11 years as Director of Support Services.

Associate Director of Support Services, **Brian Buck** serves as Forrest's overall deputy on all aspects of Support Services including direct oversight of small capital projects maintenance and administrative support services to capital projects. Now serving his fourth year in this position Brian will assume additional direct duties on the design and construction of the new bond projects. Brian has supervisory duties of administrative support staff include two dedicated financial and contracting staff members as well as four document control and general administrative support staff all of whom directly support GC/CM project delivery including pay requests, subcontracting and change orders.

Supporting all capital projects are other critical, long serving LWSD staff members including **Barbara Posthumus**, Director of Business Services providing financial, procurement accounting, and **Scott Emry**, Risk, Safety and Health Manager providing insurance provisions, builders risk plans, safety plans and risk management strategies for all construction projects.

See District Organizational Charts—Attachment B

In addition to LWSD executive, management, financial and administrative staff members, the District has contracted for project management with consulting firms since 1998 to provide scalability and unique expertise when and where needed. LWSD, along with other large school districts, have found augmenting its own staff with consultants provides the ability to add and reduce staff and acquire specialty skills quickly.

Serving the District with Program and Project Management is **OAC Services** and its strategic subconsultant **Parametrix**. Led by Program Manager, Dan Chandler, Deputy Program Manager, Pat Sprague and Parametrix Principal Consultant, Howard Hillinger. The OAC/Parametrix team is currently serving the District with a total staff of eight project managers and project engineers. Two OAC staff members currently assigned to the District have completed GC/CM training. The LWSD Construction Management Master Agreement executed in 2014 extends indefinitely subject to the needs of the District.

CONTROLS

Over the past decade the District has developed a comprehensive management and controls systems to assure projects are delivered on-time, under-budget and in-line with District standards.

Educational Specifications and Design Standards have been developed to guide the overall development including the definition of spaces, design goals, materials, and systems among other standards. These baseline documents help ensure consistency of project delivery, equity between schools, alignment with educational delivery and speed the design process.



The Program Management Plan serves as an overall guide for processes, procedures, levels of authority, communications, contracting, change orders, and documentation. Project and program status reporting throughout the organization is handled through regular emails, monthly reports, and face to face meetings. Regular status updates are posted for public consumption on the district website.

The Design and Construction Advisory Committee, a recently-formed expert advisory council meets monthly with Forrest and his team to review and make recommendations on design and construction delivery strategies. Formed in response to a recent year-long public outreach effort by the District, the Advisory Committee is comprised of five, independent design and construction experts. Current Advisory Committee members:

- Lee Kilcup, President GLY Construction (retired)
- Jay Halleran, Managing Partner NBBJ (retired)
- Gid Palmer, Development Manager Microsoft Corporation
- Eric Campbell, CEO Main Street Property Group
- Dale Cote, Director of School Support, Lake Washington School District

Office of the Superintendent of Public Instruction (OSPI), a funding partner to the District, provides additional project controls. Regular updates and approvals are required from OSPI in order for the District to secure approximately \$20 million in state funding assistance for the recently approved bond projects. Updates and approvals include estimates, schedules, value engineering studies, constructability reviews, energy life cycle cost analysis and other regular deliverables.

Each project is directly overseen by the Director of Support Services, Forrest Miller including design input, delivery method decision and overall execution. The assigned Project Manager directs the day to day business of the project including meetings, decision support, documentation, payments, forecasting, FF & E purchasing and closeout. The Program Manager and Deputy Program Manager support the Project Manager with GC/CM procurement, contracting, change negotiations and program level reporting.

Christopher L. Hirst, Partner, Pacifica Law Group and David Alskog, Partner Livengood Alskog provide the District with GC/CM contracting legal advice.

4. Personnel with Construction Experience Using various Contracting Procedures (RCW 39.10.270(2)(b)(ii).) *Limit response to two pages or less. (See attached sample to display personnel experience)*

Please provide a chart with your organization’s current personnel with construction experience using the contracting procedure and briefly describe their experience (for example, the type of project, the length of time they worked on the project, the tasks they performed, and the percent of time devoted to each task). Only identify those personnel that you reasonably expect will be with your organization over the next three years.

Project Team Chart:

Lake Washington School District Staffing:	
Nancy Bernard	President, Board of Directors
Janene Fogard	Deputy Superintendent
Forrest Miller	Director of Support Services
Brian Buck	Associate Director of Support Services

Barbara Posthumus	Director of Business Services
Scott Emry	Risk, Health and Safety Manager
Cheryl Hendrix	Administrative Support Services Supervisor
Dan Chandler	Program Manager, OAC Services
Pat Sprague	Deputy Program Manager, OAC Services
Howard Hillinger	Principal Consultant, Parametrix
Christopher L. Hirst	Pacifica Law Group, GC/CM Attorney
David Alskog	Livengood Alskog, GC/CM Attorney

Nancy Bernard, President Board of Directors:

Nancy Bernard was first elected to the Board of Directors in November 1997. She has served as Board President, Board Vice President, and Legislative Representative. She served four years on the Washington State School Directors' Association Legislative Committee. Mrs. Bernard is a public health advisor with the Washington State Department of Health and manages the indoor air quality and school environmental health and safety program. She has been actively involved in the approval and oversight of LWSD capital projects, including all GC/CM projects delivered to date.

Janene Fogard, Deputy Superintendent Operational Services:

Currently serving her 35th year at the Lake Washington School District, Janene is responsible for the overall planning and fulfillment of school facilities throughout the District, among other duties. Janene led the successful April 26, 2016 bond passage including a year-long public outreach effort, capacity planning and financial analysis to develop the suite of projects, the overall budget and delivery schedule. With 16 years in her position of Deputy Superintendent, Janene has overseen the planning and execution of \$700 million in major projects delivered since 2000 including three GC/CM projects. Janene was actively involved with preliminary planning and delivery strategy for the \$145 million Juanita High School project recently approved for GC/CM delivery and currently in the schematic design phase.

Forrest Miller, CFM, REFP, EFM, Director of Support Services:

Forrest has worked for the Lake Washington School District for 24 years and for the last 11 years as the Director of Support Services. He is also past chair of OSPI's Facilities Technical Advisory Committee, a board member of WAMOA (Washington Association of Maintenance and Operations Administrators), a member of the advisory board for the University of Washington's Facility Management certificate program, and a member and past chair of the Puget Sound Coalition of Schools. Over the last 16 years, he has been responsible for over 25 major construction projects totaling \$700,000,000. Three of these projects utilized GC/CM (Mann Elementary – a GCCM pilot project; Lake Washington High School; and, Rush Elementary School). He has earned Facility Management certification (CFM – i.e. Certified Facilities Manager) through the International Facilities Management Association (IFMA), and an Educational facility planner certification (REFP – Recognized Educational Facility Planner) through the Council of Educational Facility Planners International.

Brian Buck, Associate Director of Support Services:

Brian began his career at the Lake Washington School District in September of 2013 and is responsible for Construction, Maintenance, Operations, Utility Management and Community Projects. Brian is a member of WAMOA (Washington Association of Maintenance and Operations Administrators) and a member of the Puget Sound Coalition of Schools. Prior to Lake Washington School District, Brian worked at The Boeing Company for over 17 years and served in many roles within the Shared Services Group and Information Technology organization. Brian's last role was managing the Business Intelligence organization responsible for the cost modeling of over \$2.6 billion dollars of Information Technology cost

annually. Brian has overseen 100+small capital projects at the LWSD since 2013 valued at over \$30 million including building additions, field upgrades, portable classrooms and roof replacements. Brian completed GC/CM training at the AGC Foundation and assisted with GC/CM procurement on the recently awarded Juanita High School project.

Barbara Posthumus, Director of Business Services:

Serving the Lake Washington School District for the past 26 years, Barbara supervises the financial and business functions for the District including capital projects. Barbara and her staff are responsible for bond sales to fund projects, project and budget set up, procurement policies, and accounting. Barbara has served in this and similar roles on all GC/CM projects executed by the District. Barbara reports directly to Janene Fogard and coordinates contracting, payments, procurement and accounting functions with Forrest Miller and other capital project staff members. Barbara is a veteran of all three previous GC/CM projects executed by the District.

Scott Emry, Risk, Health and Safety Manager:

Scott has over 23 years in insurance and risk management, with the past 12 years as risk manager for the Lake Washington School District. Scott is a regular speaker/presenter at many conferences and seminars on many different subjects, including, job description/job analysis development, managing risks, AED implementation, OSHA compliance, emergency preparedness and security. Scott oversees the District's insurance program including setting insurance provisions included in construction and consulting contracts for the capital program. Scott is a veteran of two previous GC/CM projects on occupied sites in his role as Risk Manager.

Cheryl Hendrix, Administrative Services Supervisor:

Cheryl has 7 years of capital projects administrative experience at the LWSD supporting Forrest Miller, Brian Buck and the project managers including two GC/CM projects. Cheryl currently supervises a staff of seven administrative professionals including two dedicated contracting specialists. Cheryl's staff assists with the preparation and distribution of contracts, purchase orders, payments, document control and governmental compliance.

Dan Chandler, PE, AIA, Program Manager:

Dan has 36 years of construction experience including education, alternative delivery and public works experience. In his role as Program Manager, Dan assigns and coaches project managers, advises on all project delivery strategy decisions, GC/CM selection and ongoing advice on construction delivery. A charter member of the Project Review Committee and a past chair, Dan is widely known as one of Washington's leaders in alternative project delivery.

Pat Sprague, Deputy Program Manager:

Pat is a 24 year construction industry veteran of large program delivery for Microsoft Corporation including projects in Puget Sound, North America and Europe. Throughout his career Pat has led collaborative teams using exclusively negotiated delivery on over \$1 billion of delivered value. Pat is scheduled for GC/CM training in June, 2016. Pat directly supervises the OAC project managers, manages the financial forecasting platform and oversees overall program communications.

Howard Hillinger, CCM, DBIA, Principal Consultant:

Howard has over 30 years of industry experience including extensive use of GC/CM delivery including the Colman Dock, Tacoma and Washougal School Districts and Metropolitan Parks Tacoma and others where he serves in an advisory role. Howard is a current PRC member and co-chairs the annual alternative project delivery forum sponsored by the Construction Management Association of America, which includes sessions on GC/CM lessons learned

and best practices. Howard supports the overall program by coordinating and coaching Parametrix Project Management staff dedicated to the LWSD program.

Christopher L. Hirst, Attorney:

Chris is knowledgeable and experienced in design and construction contracting and procurement processes for public construction as well as private construction using GC/CM processes. Mr. Hirst is a partner in the Seattle office of Pacifica Law Group. He is also a member of the Capital Projects Advisory Review Board (CPARB). He has assisted numerous school districts on projects using the GC/CM process including Stadium and Lincoln High Schools in the Tacoma School District, Woodinville High School in the Northshore School District, Steilacoom High School in the Steilacoom Historical School District, Snohomish High School in the Snohomish School District, Wahluke High School in the Wahluke School District, Wellpinit School in the Wellpinit School District, as well as advising LWSD for several years.

David Alskog, Attorney:

For over 30 years, David Alskog's practice has focused on public contract and construction law, school law, real estate and commercial litigation. David's school and municipal law practice has allowed him to advise the Lake Washington School District concerning a broad range of issues including land use and construction, contracts and transactions, procurement and purchasing, public bidding and bid documents, bid protest and claims analysis, and litigation supervision.

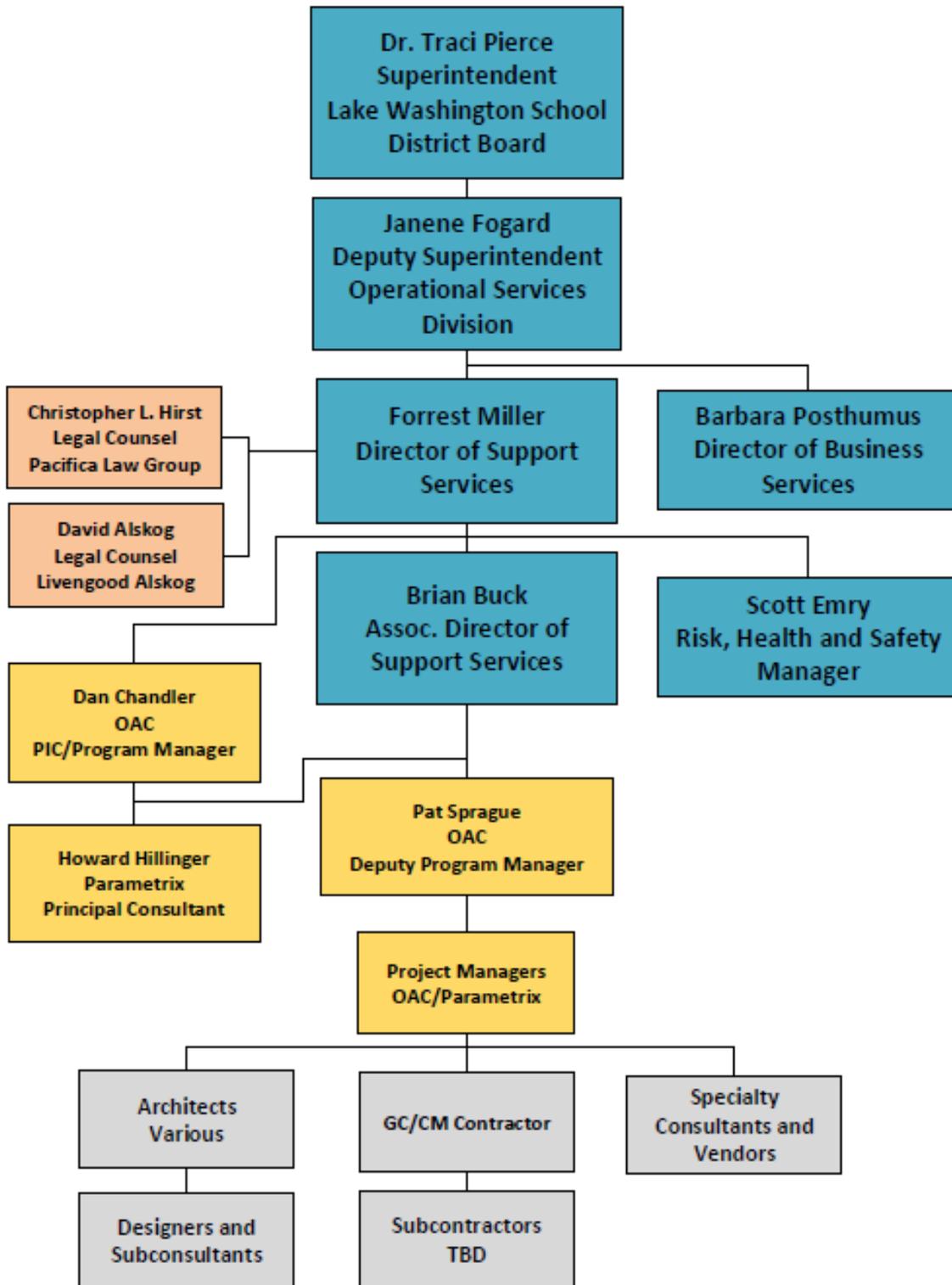
See Team Experience Attachment C

- 5. Management Plan and Rationale for Alternative Contracting Projects** (RCW 39.10.270 (2)(b)(iii).) *Limit response to one page or less. (See attached example of a management plan and rationale for using an alternative contracting procedure.)*

Please provide your typical management plan or protocol that you would use to manage a GGCM project. Your plan should address the typical roles, types of positions with specific responsibilities and also list any advisory or oversight roles (by expertise).

The following pages outlines the District's organizational structure for capital projects including Alternative Contracting. An organization chart for the 2016 Bond Program and a Roles and Responsibilities Matrix are included.

LWSD Organization Chart



Roles and Responsibilities:

Superintendent/School Board	Approve proposed projects for development, secure funding, report to the public, voters and taxpayers.
Deputy Superintendent	Supervise Support Services and oversee execution of projects. Approve project budgets, change orders and contract awards, modifications and acceptances for board approval.
Director of Support Services	Supervise capital project decisions, execution and Capital Projects staffing. Concur/overrule delivery method determination by Program Manager. Approve design direction and submittals, project budgets, change orders and prepare contract awards, modifications and acceptances for Deputy Superintendent approval.
Associate Director of Support Services	Lead and oversee all capital projects including delivery method decisions, consultant and contractor selection, supervising project managers and other Capital Projects staff. Approve delivery method recommendation prepared by Program Manager.
Direct of Business Services	Manage bond sales to support construction, district financial processes and records, procurement policies, and audit compliance.
Risk, Health and Safety Manager	Establish overall insurance and indemnity language for all construction projects, oversees risk management and safety for the District.
Attorney	Contract preparation, legal advice and dispute resolution.
Program Manager	Oversee the execution of the program. Provide direction and recommendations to the Director and Associate Director.
Deputy Program Manager	Oversee the day to day execution of the projects. Assign and coach Project Managers on overall project delivery, reporting and consistency.
Project Manager	Drive the day to day success of each project. Serve as primary point of contact with Architect and GCCM
Architect	Lead designer and prime consultant for the design of projects. Contracted to LWSD.
GCCM	General Contractor/Construction Manager selected via qualifications and fee process. Contracted to LWSD.

6. Contracting Procedures (RCW 39.10.270 (2)(b).) (Limit responses to two pages or less. (See attached example table of how to display construction history.)

Please provide a table with the following information for a maximum of twenty-five (25) public works projects with a total cost of at least \$5M each that your organization has managed over the past 10 years:

- Name of project
- Description of project
- Total project cost
- Method of delivery (GC/CM or other)
- Lead Design Firm (including current contact information)
- General Contractor or GC/CM (including current contact information)
- Planned construction start at authorization date
- Planned completion date
- Actual construction start date
- Actual completion date
- Reason for schedule overrun (if any)
- Original budget at authorization (not including land acquisition)
- Final Cost
- Reason for cost overrun (if any)

**If the public body has fewer than twenty-five (25) applicable projects, it may list projects under \$5 million if they believe them to be relevant.*

***If the public body has more than twenty-five (25) applicable projects, they should state the number of projects they have managed and provide a list of the twenty-five (25) projects it believes are most relevant.*

See LWSD project experience—Attachment D

7. Demonstrated Success in Managing at Least One Project Using the GCCM Contracting Procedure Within the Last Five Years (RCW 39.10.270 (2)(b).) (Limit response to one page or less.)

In addition to the information provided in response to Question 7 about projects that your organization has managed using the alternative contracting procedure, please provide a narrative discussion with the following information:

- Appropriateness of the alternative contracting method used for the project(s).
- Lessons learned from your experience.

The Lake Washington School District has completed three GC/CM projects and has recently awarded its fourth as outline below:

Mann Elementary (2002-2003)

Construction Cost: \$13M

Selected GCCM: Kirtley Cole Construction

Status: Completed

Completed on time with budget adjustment for unforeseen subsurface conditions. Application of GC/CM appropriate for occupied site.

Lessons learned: the importance of open, transparent team development.

Lake Washington High School (2009-2011)

Construction Cost: \$87M

Selected GCCM: Lydig Construction

Status: Completed 2011

Completed on time and under budget. This project had to be phased because it was an occupied site.

Lessons learned: The timing of establishing GMP (MACC). Too early may be too conservative. The value of the contractor in the subcontractor procurement process.

Benjamin Rush Elementary (2011-2013)

Construction Cost: \$31.9M

Selected GCCM: Mortenson Construction

Status: Completed 2012

Completed on time and under budget. Occupied and constricted site.

Lessons learned: The careful use of contractor and owner contingency and the clear definition of risk allocation early.

Active GC/CM Projects:

Juanita High School Rebuild & Expand (2016-2021)

Construction Cost: \$98M

Selected GCCM: Cornerstone Construction

Status: In Schematic Design

Approved by PRC in February 2016, Awarded in April 2016

Complex, phased replacement and expansion on occupied site

Lessons learned: The value of extended interviews including office visits to break down barriers and nervousness in interview settings.

8. Ability To Properly Manage the Public Body's Capital Facilities Plan (RCW 39.10.270 (2) (b) (vi).) (Limit response to one page or less.)

As part of this statutory requirement, the PRC needs to determine that the public body has the appropriate project planning and budgeting experience. In addition to the information that's been requested in previous questions, please provide other information to assist the PRC to determine whether the organization has project planning and budgeting experience.

The Lake Washington School District has successfully planned, budgeted and executed over \$700 million in capital projects since 2000 under its current executive leadership team. 25 individual major projects spanning four bond and levy cycles have all been delivered successfully.

Relevant sections of RCW 39.10.270 are addressed below:

(2) ... A public body seeking certification for the general contractor/construction manager procedure must demonstrate successful management of at least one general contractor/construction manager project within the previous five years.

Response: The Lake Washington School District has completed three successful GC/CM projects including two in the last five years.

(3) To certify a public body, the committee shall determine that the public body:

(a) Has the necessary experience and qualifications to determine which projects are appropriate

Response: Led by Director of Support Services, Forrest Miller with his 24 years of industry experience and extensive professional qualifications the Lake Washington School District has built an outstanding capital projects delivery team well versed in the statutes and best practices in project delivery.

(b) Has the necessary experience and qualifications to carry out the alternative contracting procedure including, but not limited to:

(i) Project delivery knowledge and experience;

Response: LWSD's extensive project delivery knowledge and experienced is detailed throughout this application.

(ii) personnel with appropriate construction experience:

Response: LWSD personnel with appropriate construction experience include, but are not limited to Janene Fogard, Forrest Miller, and Brian Buck in executive roles, Cheryl Hendrix and her staff in administrative and financial support roles.

(iii) a management plan and rationale for its alternative public works projects;

Response: The LWSD management plan mirrors and is compliant with RCW 39.10.340 on uses of GC/CM contracting. Rationale and processes are in place to determine and approve the most appropriate delivery method for each project.

(iv) demonstrated success in managing public works projects;

Response: LWSD has successfully delivered 25 large capital projects valued at \$700 million since 2000.

(v) the ability to properly manage its capital facilities plan including, but not limited to, appropriate project planning and budgeting experience; and

Response: The LWSD produces a Six Year Capital Facilities Plan (CFP) on an annual basis <http://www.lwsd.org/SiteCollectionDocuments/For-The-Community/Construction/Capital-Facility-Plan.pdf>. The CFP, along with other planning and budgeting tools are used to develop strategies to meet the growing capital needs of the District including new and replacement schools and ongoing maintenance projects.

(vi) the ability to meet requirements of this chapter;

Response: The Lake Washington School District fully meets the requirement of this chapter as demonstrated in this application.

9. Ability to Meet the Requirements of Chapter 39.10 of the Revised Code of Washington (RCW 39.10.270 (2)(b)(vii).) (Limit response to one page or less.)

Please provide any information not presented in your answers to Questions 3-9 further demonstrating your organization's ability to meet the requirements of this chapter.

As the fourth largest and one of the fastest growing districts in Washington, the Lake Washington School District has proven itself to be competent, successful public builder well prepared to use GC/CM delivery in accordance with all applicable statutes.

The District is now beginning a six-year, eight project, \$430m construction program following the passage of the April 26, 2016 bond measure. Five of the eight projects are on occupied sites and candidates for GC/CM delivery.

See Program Budget Summary--Attachment E

Beyond the 2016 bond program, the District's long-term plan for addressing growing student enrollment include planned bond issues in 2018, 2022, and 2026 including 13 planned new and replacement school projects.

See Preliminary Program Schedule 2016 and 2018 Bond Programs—Attachment F

A very experienced and successful public builder, the Lake Washington School District has developed a robust internal staff and control systems to plan and execute the work, select the most appropriate delivery methods and apply GC/CM successfully.

To further augment and enhance its outstanding internal capabilities, the District has chosen to team with professional project and construction management consulting firms since 1998. This successful teaming model is executed with internal and consultant staff members co-located at the District Support Services Center where regular strategy and project meetings are held. Currently contracted with OAC Services, Washington's most experienced GC/CM project leader, the District is ideally positioned to select GC/CM delivery when appropriate and execute those projects smoothly.

10. Resolution of Audit Findings on Previous Public Works Projects (RCW 39.10.270 (2)(c).) (Limit Response to one page or less.)

If your organization had audit findings on any project identified in your response to Question 6, please specify the project, briefly state those findings, and describe how your organization resolved them.

RESPONSE:

No audit findings.

Respectfully Submitted,

Forrest Miller, CFM, REFP, EFM | Director of Support Services
Lake Washington School District



May 2, 2016

Attachments

Internal Application for Project Approval--Attachment A



Lake Washington School District
RECOMMENDATION FOR PROJECT APPROVAL
TO USE THE
GENERAL CONTRACTOR/CONSTRUCTION MANAGER (GC/CM)
CONTRACTING PROCEDURE
Internal Review Form

Project Name: _____

Project Cost: _____

Anticipated Construction Start Date: _____

In order to qualify to use the GC/CM contracting procedure, projects must meet at least one of the following criteria:

1. If implementation of the project involves complex scheduling, phasing, or coordination, what are the complexities?
2. 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 0.
3. If involvement of the GC/CM is critical during the design phase, why is this involvement critical?
4. If the project encompasses a complex or technical work environment, what is this environment?
5. 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?
6. 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?

Provide a detailed explanation of why use of the contracting procedure is appropriate for the proposed project:

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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

GC/CM Delivery Method Recommended by:

Dan Chandler, Program Manager

Date

GC/CM Delivery Method Approved by:

Forrest Miller, Direct of Support Services

Date

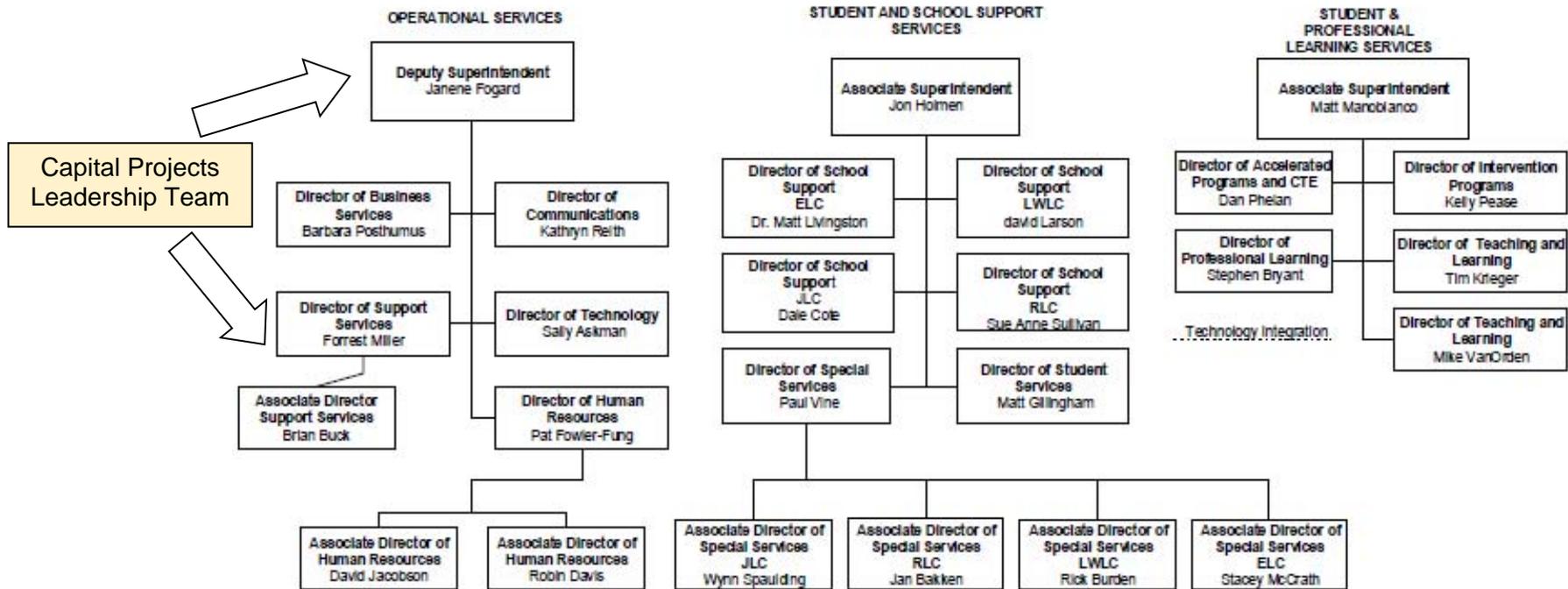
District Organization Charts—Attachment B

Executive Level

Lake Washington School District
2015-16



SCHOOL SUPPORT TEAMS



District Organization Charts—Attachment B

Operational Services Division

**Lake Washington School District
Operational Services Division
Responsibility List 2015-16**

Overall Function:		Ensure effective and efficient district operations that support strategic goals		
Division Leader:		Janene Fogard, Deputy Superintendent <ul style="list-style-type: none"> • Continuous Improvement Process • Policy/Legal Compliance • Labor Relations • Classified Professional Learning • Department Administrator Learning Community 		
		<div style="border: 1px solid black; padding: 5px; display: inline-block;">Capital Projects Support Team</div>		
Human Resources	Support Services	Communications	Business Services	Technology Operations
Pat Fowler-Fung <i>Director of Human Resources</i> <ul style="list-style-type: none"> • Affirmative Action • Disclosures/Background checks • Teacher/Labor Relations • Legal-Employment Matters • Substitutes • Leaves • Negotiations David Jacobson <i>Associate Director</i> <ul style="list-style-type: none"> • Certified <ul style="list-style-type: none"> ❖ Staffing ❖ Recruitment ❖ Highly Qualified ❖ Hiring ❖ Assignment/Transfer ❖ Discipline ❖ Unemployment Robin Davis <i>Associate Director</i> <ul style="list-style-type: none"> • Classified <ul style="list-style-type: none"> ❖ Staffing ❖ Recruitment ❖ Highly Qualified ❖ Hiring ❖ Assignment/Transfer ❖ Discipline ❖ Unemployment • ADA 	Ernest Miller <i>Director of Support Services</i> <ul style="list-style-type: none"> • Capital Planning • Real Estate Brian Buck <i>Associate Director</i> <ul style="list-style-type: none"> • Facility Services • School/Community Sponsored Projects • Construction • Maintenance • Utility Management Scott Emry <i>Risk, Health, and Safety Manager</i> <ul style="list-style-type: none"> • Custodial Services • Ergonomics • Environmental Issues • Insurance/Claims • L&I/OSHA/WISHA • Overnight and Out-of-State Field Trips • Safety/Emergency Prep/SROs Jeff Miles <i>Transportation Manager</i> <ul style="list-style-type: none"> • Transportation Services • Vehicle Management • Radios Lars Posthumus <i>Transportation Coordinator</i> <ul style="list-style-type: none"> • Dispatch, Activity & Field Trips 	Aryn Reith <i>Director of Communications</i> <ul style="list-style-type: none"> • Communication • Social Media • Public/Media Relations • Public Records Requests • Website/Portal • Video Production • Crisis Communication • District Surveys • FERPA Jim Crouch <i>Print Center Manager</i> <ul style="list-style-type: none"> • Print Center • Records Retention Shannon Parthemer <i>Communications Manager</i> <ul style="list-style-type: none"> • Volunteers • Internal Communication • District Communication Tools • Public/Media Relations • Publications • Commute Trip Reduction 	Barbara Posthumus <i>Director of Business Services</i> <ul style="list-style-type: none"> • Basic Ed • Building Use • Contracts • Enrollment Reporting • Nutrition Services • Staffing Allocations Lynne Pyke <i>Budget Manager</i> <ul style="list-style-type: none"> • Budgeting • Grant Claims • Inventory Robert Trepanier <i>Purchasing Manager</i> <ul style="list-style-type: none"> • Purchasing/Procurement • Bids & Quotes George Walker <i>Warehouse Manager</i> <ul style="list-style-type: none"> • Warehouse • Equipment Surplus • Food & Mail Delivery • Loaner Equipment • Archives/Storage Margo Allen <i>Controller</i> <ul style="list-style-type: none"> • Accounting Investments • Cash Register • Credit Cards • ASB Nancy Teske <i>Payroll Manager</i> <ul style="list-style-type: none"> • Payroll & Benefits 	Sally Askman <i>Director of Technology</i> <ul style="list-style-type: none"> • Technology Infrastructure Strategy & Capital Levy Planning • Technology Project Management Matt Palmer <i>Applications and Technical Communications Services Manager</i> <ul style="list-style-type: none"> • E-Rate • Facilities Liaison • Sharepoint • Application Provisioning and Account Management • Voice and Fiber Carmen Urrutia <i>Data Center Manager</i> <ul style="list-style-type: none"> • Core Skyward Applications • Student Fiscal and HR Processes • Inform and Data Dashboard • State, Local, and District Data Reports Randall Wood <i>Technical Operations Manager</i> <ul style="list-style-type: none"> • Network Security • Server & Network Infrastructure • Network Access and Performance • Computer Imaging and Updates Debbie Lee <i>Technical Support Manager</i> <ul style="list-style-type: none"> • HelpDesk • Field Support • Computer Repair

Project Team Experience—Attachment C

Name	Summary of Experience	Projects	Construction Budget	Delivery Method	Role During Project Phases		
					Pre-Design	Design	Construction
Janene Fogard	Deputy Superintendent, 35 years of executive experience including planning and delivering \$700m projects and 3 GC/CM	Lake Washington High School	\$87M	GC/CM	Asst Supt	Asst Supt	Asst Supt
		Mann Elementary	\$12.5M	GC/CM	Asst Supt	Asst Supt	Asst Supt
		Rush Elementary	\$32M	GC/CM	Asst Supt	Asst Supt	Asst Supt
		Finn Hill Middle School	\$43M	DBB	Asst Supt	Asst Supt	Asst Supt
Forrest Miller, CFM, REFP, EFM	Director of Support Services, 24 years, \$700M delivered, 3 GC/CM projects	Lake Washington High School	\$87M	GC/CM	Director	Director	Director
		Mann Elementary	\$12.5M	GC/CM	Director	Director	Director
		Rush Elementary	\$32M	GC/CM	Director	Director	Director
		Finn Hill Middle School	\$43M	DBB	Director	Director	Director
Brian Buck	Associate Director of Support Services, 3 years at LWSD, small capital projects leader, GC/CM trained	Small capital projects 2013	\$10M	DBB	Assoc Dir	Assoc Dir	Assoc Dir
		Small capital projects 2014	\$20M	DBB	Assoc Dir	Assoc Dir	Assoc Dir
		Small capital projects 2015	\$20M	DBB	Assoc Dir	Assoc Dir	Assoc Dir
		Juanita High School 2016-2021	\$98M	GC/CM	Assoc Dir	Assoc Dir	Assoc Dir
Barbara Posthumus	Director of Business Services, 26 years at LWSD, manages finances, bond sales, and procurement	Lake Washington High School	\$87M	GC/CM	Dir Busn Serv	Dir Busn Serv	Dir Busn Serv
		Rush Elementary	\$32M	GC/CM	Dir Busn Serv	Dir Busn Serv	Dir Busn Serv
		Finn Hill Middle School	\$43M	DBB	Dir Busn Serv	Dir Busn Serv	Dir Busn Serv
		Juanita High School 2016-2021	\$98M	GC/CM	Dir Busn Serv	Dir Busn Serv	Dir Busn Serv
Scott Emry	Risk, Health and Safety Manager, 12 years at LWSD	Lake Washington High School	\$87M	GC/CM	Risk Mgr	Risk Mgr	Risk Mgr
		Rush Elementary	\$32M	GC/CM	Risk Mgr	Risk Mgr	Risk Mgr
		Finn Hill Middle School	\$43M	DBB	Risk Mgr	Risk Mgr	Risk Mgr
		Juanita High School 2016-2021	\$98M	GC/CM	Risk Mgr	Risk Mgr	Risk Mgr
Cheryl Hendrix	Admin Support Supervisor, 7 years district experience, in contracting, payments and document control	Lake Washington High School	\$87M	GC/CM	Admin Supv	Admin Supv	Admin Supv
		Rush Elementary	\$32M	GC/CM	Admin Supv	Admin Supv	Admin Supv
		Finn Hill Middle School	\$43M	DBB	Admin Supv	Admin Supv	Admin Supv
		Juanita High School 2016-2021	\$98M	GC/CM	Admin Supv	Admin Supv	Admin Supv
Dan Chandler, PE, AIA	Program Manager, 35 years, 33 GC/CM projects, past PRC Chair	Oak Harbor WWTP	\$70M	GC/CM	Advisor	Advisor	Advisor
		Northcreek High School	\$133M	GC/CM	Advisor	Advisor	Advisor
		Clover Park Elementary Schools	\$140M	GC/CM	PM PIC	PM PIC	PM PIC
		Tahoma High School	\$120	GC/CM	PM PIC	PM PIC	PM PIC
Pat Sprague	Deputy Program Manager, 24 years major development experience, \$1B+ value delivered	Microsoft Bulding 27 (1996)	confidential	Negotiated, Cost-Reimbursable (Similar to GC/CM)	Dev Mgr	Dev Mgr	Dev Mgr
		Microsoft Building 33 (1999)	confidential		Dev Mgr	Dev Mgr	Dev Mgr
		Microsoft West Campus Development (2006)	confidential		Prog Mgr	Prog Mgr	Prog Mgr
		Perceptive Pixel, Hardware Assembly Building (2014)	confidential		Prog Mgr	Prog Mgr	Prog Mgr

LWSD Public Body Experience, 1999-2013—Attachment D

Project Name	Project Description	Deliv. Method	Architect / General Contractor	Planned Start	Planned Finish	Actual Start	Actual Finish	Budget (\$)	Actual Cost (\$)	Budget Variance (%)	Explanation
Twain Elementary	New Elementary School	DBB	NAC/ Kassel	1999	2000	1999	2000	\$ 10,641,411	\$ 10,726,461	0.8%	Scope change
Audubon Elementary	Replacement on Occupied Site	DBB	NAC/ Columbia Pacific	1999	2000	1999	2000	\$ 10,609,597	\$ 10,956,757	3.3%	Contractor bankruptcy
Lakeview Elementary	"	DBB	NAC/ Berschauer Phillips	2000	2011	2000	2011	\$ 13,202,303	\$ 13,962,897	5.8%	Unforeseen conditions
Redmond Jr High School	"	DBB	McGranahan/ Berschauer Phillips	2000	2011	2000	2011	\$ 23,570,009	\$ 23,438,400	-0.6%	
Redmond High School	"	DBB	McGranahan/ Berschauer Phillips	2000	2012	2000	2012	\$ 51,468,635	\$ 53,704,131	4.3%	Extended schedule
Mann Elementary	"	GCCM	McGranahan/ Kirtley Cole	2002	2003	2002	2003	\$ 12,282,828	\$ 12,559,100	2.2%	Unforeseen conditions
Kirkland Jr High School	"	DBB	NAC/ Lydig	2003	2004	2003	2004	\$ 23,449,149	\$ 21,995,758	-6.2%	
Juanita Elementary	"	DBB	Hutteball/ Lydig	2004	2005	2004	2005	\$ 13,500,000	\$ 13,070,900	-3.2%	
Franklin Elementary	"	DBB	Mahlum/ Spee West	2004	2005	2004	2005	\$ 13,600,000	\$ 13,485,000	-0.8%	
Rose Hill Elementary	"	DBB	DLR/ Korsmo	2005	2006	2005	2006	\$ 14,600,000	\$ 14,192,300	-2.8%	
Rosa Parks Elementary	New Elementary School	DBB	Mahlum/ Spee West	2005	2006	2005	2006	\$ 18,177,300	\$ 18,016,808	-0.9%	
Carson Elementary	New Elementary School	DBB	Integrus/Kassel Const.	2007	2008	2007	2008	\$ 24,975,000	\$ 26,409,625	5.7%	Sewer connection, land imprv & railing
Frost Elementary	Replacement on Occupied Site	DBB	Studio Meng/ Cornerstone	2008	2009	2008	2009	\$ 25,600,000	\$ 24,091,360	-5.9%	
Lake Wa High School	"	GCCM	McGranahan/ Lydig	2008	2011	2008	2011	\$ 90,000,000	\$ 87,156,228	-3.2%	Successful GC/CM
Muir Elementary	"	DBB	Mahlum/ Allied Const.	2008	2010	2010	2012	\$ 29,639,422	\$ 30,982,489	4.5%	Claim settle in mediation
Finn Hill Middle School	"	DBB	Mahlum/ Babbit Neumann	2009	2010	2010	2011	\$ 45,342,602	\$ 44,764,114	-1.3%	
Sandberg Elementary	"	DBB	NAC/ Spee West	2011	2012	2011	2012	\$ 30,575,000	\$ 29,569,913	-3.3%	Favorable market in recession
Bell Elementary	"	DBB	DLR/ Cornerstone	2011	2014	2012	2013	\$ 32,531,000	\$ 31,675,099	-2.6%	Favorable market in recession
Rush Elementary	"	GCCM	Integrus/ Mortensen	2011	2011	2011	2012	\$ 34,062,269	\$ 33,678,912	-1.1%	Successful GC/CM
Eastlake High School Addn	Addition on Occupied Site	DBB	Hutteball & Oremus/ Bayley	2011	2012	2011	2012	\$ 18,169,620	\$ 17,469,789	-3.9%	
Redmond High School Addn	Addition on Occupied Site	DBB	McGranahan/ Pellco Const	2011	2012	2011	2012	\$ 15,830,380	\$ 14,787,818	-6.6%	
Keller Elementary	Replacement on Occupied Site	DBB	BLRB/ Cornerstone	2012	2013	2011	2012	\$ 26,343,000	\$ 24,933,708	-5.3%	
Rose Hill Middle School	"	DBB	Bassetti/ Absher	2012	2013	2012	2013	\$ 59,779,000	\$ 58,576,482	-2.0%	Favorable market in recession
International Comm School	New Choice Specialty School	DBB	Magellan/ Allied Const.	2012	2013	2012	2013	\$ 26,648,990	\$ 25,480,231	-4.4%	
STEM Choice High School	"	DBB	Integrus/ Absher	2012	2012	2012	2013	\$ 34,031,922	\$ 34,007,019	-0.1%	
Fourteen year performance record							TOTALS	\$ 699,000,000	\$ 690,000,000	-1.3%	

LWSD 2016 Bond Program Summary—Attachment E

Project	Description	Project Comp. Date	Location	Total Cap.	Square Footage	Budget (\$M)	GCCM Candidate?
Juanita High School Replacement	Replace academic building opened in 1971, retain field house and pool	2021	Kirkland	1800	217,000	\$146	Yes, approved and procured
Redmond Ridge Middle School	New school to address overcrowding at middle schools in Redmond Learning Community	2019	Redmond Ridge, King County	900	134,000	\$78	TBD, critical delivery
Redmond Ridge East Elementary School	New school to address overcrowding at elementary schools in Redmond Learning Community	2018	Redmond Ridge, King County	550	78,000	\$43	TBD, critical delivery
North Redmond Elementary School	New school to address overcrowding at elementary schools in Redmond Learning Community	2018	Redmond	550	78,000	\$43	TBD, critical delivery
Kirk Elementary Modernization/Replacement	Replacement/expansion of Kirk Elementary, built 1975	2019	Kirkland	550	78,000	\$45	Likely, Occupied Site
Mead Elementary Modernization/Replacement	Replacement/expansion of Mead, built 1979	2020	Sammamish	550	78,000	\$45	Likely, Occupied Site
Explorer Community School Replacement	Replace aging portables with new green portables.	2017	King County	70	3,000	\$2	Likely, Occupied Site
Old Redmond Schoolhouse Preschool	Renovate Old Redmond School House for preschool use	2019	Redmond		40,000	\$7	Likely, Occupied, Historic Site
Small capital projects throughout the District	Fields, grandstands, bleachers, outside restrooms	2016-2018	various			\$7	not likely
3% Program Contingency						\$12	\$13
Total				4970	706,000	\$428	\$13

Preliminary Program Schedule 2016 and 2018 Bond Measures—Attachment F

Project		2016	2017	2018	2019	2020	2021
High Schools	Juanita HS Rebuild/Enlarge	Design		Build			
	Lake Washington HS Addition			Design	Build		
	New Eastside Choice HS			Design	Build		
Middle Schools	New Redmond Ridge MS	Design		Build			
	Kamiakin MS Replacement			Design	Build		
Elementary Schools	New Redmond Ridge East ES	Design	Build				
	New North Redmond ES	Design	Build				
	Kirk Elementary Rebuild/Enlarge		Design	Build			
	Mead Elementary Rebuild/Enlarge		Design	Build			
	New LWLC Elementary			Design	Build		
	Alcott Elementary Rebuild/Enlarge			Design	Build		
Key	2016 Bond Projects --Funded	Design	Build		\$430 Million		
	2018 Bond Projects--Planned			Design	Build		\$310 Million