



Capital Improvements to Shadow Lake, Rock Creek and Glacier Park Elementary Schools

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

Application for Project Approval

November 1, 2016

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

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

APPLICATION FOR PROJECT APPROVAL
TO USE THE
GENERAL CONTRACTOR/CONSTRUCTION MANAGER (GC/CM)
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):

Tahoma School District #409

(b) Address:

**25720 Maple Valley – Black Diamond RD SE
Maple Valley, WA 98038**

(c) Contact Person Name: **Lori Cloud**

Title: **Assistant Superintendent, Director of Finance and Operations**

(d) Phone Number: **425.413.3433** Fax: **425.413.3455** E-mail: **lcloud@tahomasd.us**

2. Brief Description of Proposed Project.

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

The proposed project includes capital improvements to Shadow Lake, Rock Creek and Glacier Park Elementary Schools. The scope of work includes tenant improvements to administration areas, new outdoor/physical education spaces, systems upgrades (HVAC, Controls, Fire/Life Safety) and security upgrades including vestibules, access controls and surveillance cameras.

3. Projected Total Cost for the Project:

A. Retrofit Project Budget

Costs for Professional Services (A/E, Legal etc.)	\$ 613,000
Estimated project construction costs (including construction contingencies):	\$5,115,000
Equipment and furnishing costs	\$ 100,000
Off-site costs	\$ 72,000
Contract administration costs (Owner, CM etc)	\$ 159,000
Contingencies (design & owner) (15% of construction budget)	\$ 767,250
Other related project costs (permits, moving, testing)	\$ 250,000
Sales Tax at 8.6%	\$ 439,890
<hr/> Total	<hr/> \$7,516,140

B. Funding Status

Please describe the funding status for the whole project.

This project is funded by the 2013 Bond Program.

4. Anticipated Project Design and Construction Schedule

Please provide:

- The anticipated project design and construction schedule, including (1) procurement; (2) hiring consultants if not already hired; and (3) employing staff or hiring consultants to manage the project if not already employed or hired.
(See Attachment B for an example schedule.)
- If your project is already beyond completion of 30% drawings or schematic design, please list compelling reasons for using the GC/CM contracting procedure.

Project Milestones	
Project Scope Development	September 2016
Selection of Architect/Engineers	October, 2016
PRC GC/CM Consideration	December 1, 2016
Issue GC/CM RFQ	December 5, 2016
GC/CM Shortlist	January 4, 2017
GC/CM Interviews	January 11, 2017
GC/CM Proposals	January 16, 2017
Preconstruction	January 17, 2017
Construction	May 2017

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?
- 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.

- If involvement of the GC/CM is critical during the design phase, why is this involvement critical?
- If the project encompasses a complex or technical work environment, what is this environment?
- If the project requires specialized work on a building that has historical significance, why is the building of historical significance and what is the specialized work that must be done?
- 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?

This project meets 3 of the 6 GC/CM Criteria.

Complex scheduling, phasing and coordination involved:

The project involves an accelerated design, procurement and construction schedule so that we may complete the work prior to the District's realignment involving grade changes and moving of students and staff at all 9 campuses during the summer of 2017. The GCCM will play a critical role during preconstruction with determining the best approach to phasing, scheduling and coordination with the District administration, faculty and staff to ensure that deadlines are met with minimal impact to teaching and learning. (see flow chart Attachment C)

Construction at Existing Facilities:

All three sites will be occupied during construction, we anticipate the majority of the interior work occurring during the Summer of 2017. However, site work will likely be completed in the Fall of 2017 and some tenant improvement work (areas with systems upgrades that have longer procurement times) will occur during the school year ie. Security upgrades, controls upgrades, etc. Having the GCCM on the team to develop a logistics plan and safety plan is critical to the success of the project.

GC/CM Involvement is Critical:

The ability to evaluate existing spaces and identify potential construction pit falls that could stall our project is crucial. The GC/CM team will have time to identify issues and unknown conditions during preconstruction and negotiate the appropriate means of addressing, thus minimizing our risk. We have small windows of non-academic time to complete construction, we will not have time to perform re-design work mid-summer. The District wide realignment effort is contingent upon these spaces being complete and ready for occupancy. We have no contingency classroom space available if these projects are not completed. The Design/Bid/Build method is too risky for this work.

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

GC/CM Provides Substantial Public Benefit:

GC/CM will benefit the public by increasing predictability, reducing financial risk and increasing the projects ability to stay on schedule. The GC/CM is closer to actual costs for subcontractors, increasing the confidence level of pre-construction estimates. With the GC/CM delivery method, Tahoma School District will be able to have a higher degree of predictability in estimating anticipated construction costs during the design effort.

7. Public Body Qualifications

Please provide:

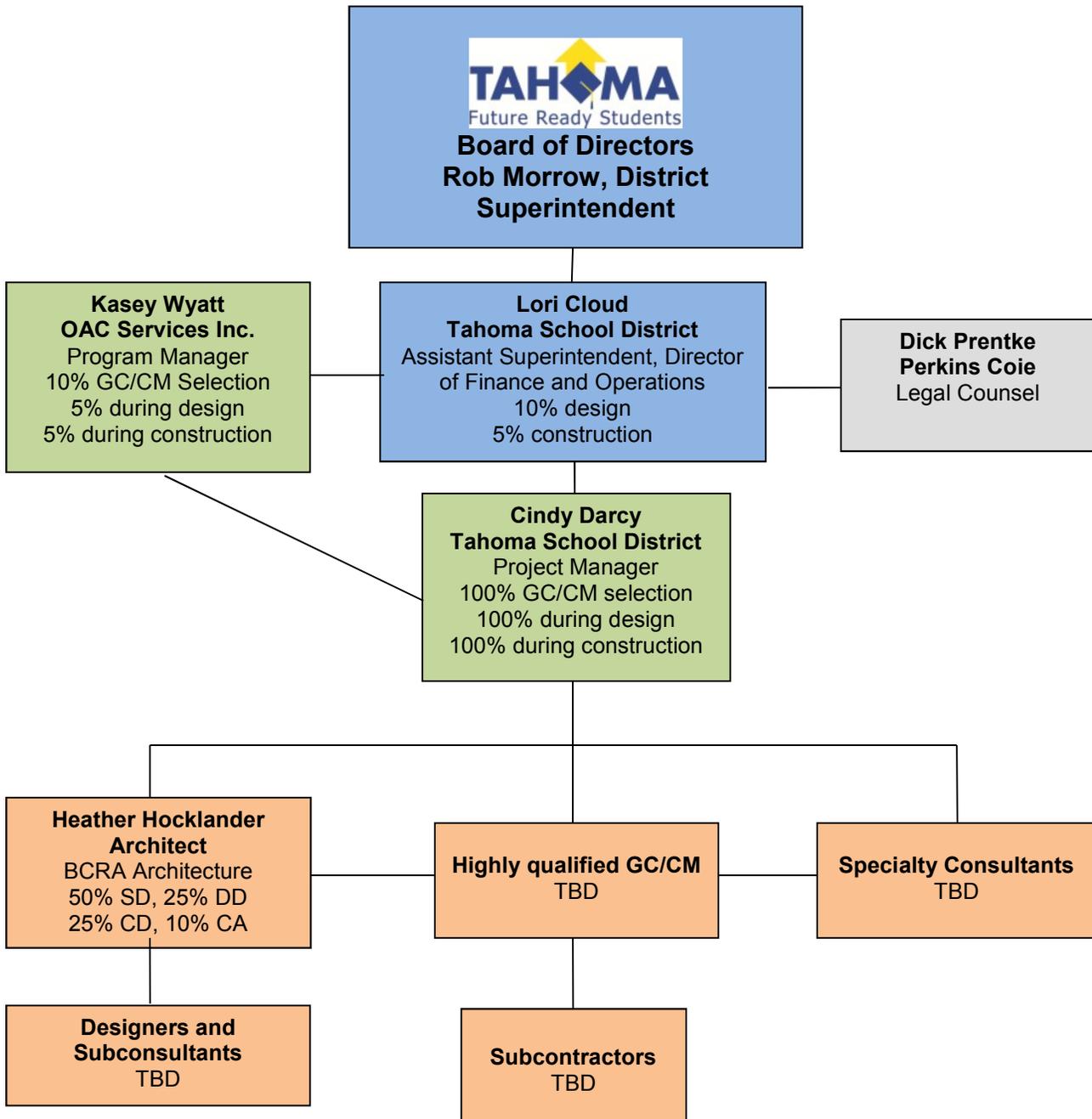
- A description of your organization’s qualifications to use the GC/CM contracting procedure.
- A **Project** organizational chart, showing all existing or planned staff and consultant roles.
Note: The organizational chart must show the level of involvement and main responsibilities anticipated for each position throughout the project (for example, full-time project manager). If acronyms are used, a key should be provided. (See Attachment C for an example.)
- Staff and consultant short biographies (not complete résumés).
- Provide the **experience and role on previous GC/CM 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.)
- The qualifications of the existing or planned project manager and consultants.
- 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.
- A brief summary of the construction experience of your organization’s project management team that is relevant to the project.
- A description of the controls your organization will have in place to ensure that the project is adequately managed.
- A brief description of your planned GC/CM procurement process.
- Verification that your organization has already developed (or provide your plan to develop) specific GC/CM or heavy civil GC/CM contract terms.

Tahoma School District will be managing the GCCM procurement process, design, construction and closeout with OAC Services contributing in an advisory role. OAC Services is currently under contract with the District for Program and Project Management of the Tahoma High School and Regional Learning Center and Lake Wilderness Elementary. In addition, Tahoma School District

has a team of experienced Capital Projects professionals that have successfully managed multiple school construction projects utilizing GC/CM, design/bid build and small works methodologies.

See Attachment A for additional details.

Project Organization Chart
Capital Improvements to Shadow Lake, Rock Creek and Glacier Park



Capital Improvements to Shadow Lake, Rock Creek and Glacier Park

Lori Cloud

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

Lori has been Director of Finance and Operations for the Tahoma School District since August 2002, and became the Assistant Superintendent in 2014. She is a CPA, a graduate of the University of Montana and has many years of financial experience in the private sector. Lori oversees all capital projects, finance and operational functions for the District. She is currently overseeing all of the 2013 Bond projects including the construction of the New Tahoma High School and Regional Learning Center, Lake Wilderness Elementary and Renovations to Tahoma and Cedar River Middle Schools, all GC/CM projects. Lori is a seasoned professional in the practice of alternative delivery projects.

Cindy Darcy

Purchasing/Risk Agent, Tahoma School District

Cindy has been with the District since February of 2008, and is a Project Manager for Capital Projects. She is a graduate of Eastern Washington University with a business degree in Management Information Systems. Prior to joining Tahoma, Mrs. Darcy spent 15 years working for the Weyerhaeuser Real Estate Company as an information technology and job costing project manager. Her local experience includes master planned communities such as Snoqualmie Ridge and Northwest Landing and homebuilding companies such as Quadrant Homes. Mrs. Darcy has been responsible for managing multiple small works projects at Tahoma including auditorium modernizations, security upgrades, CTE modernizations, athletic fields/stadium improvements, building envelope upgrades, portable relocations and interior tenant improvement projects. Mrs. Darcy recently and highly successfully managed the complex Renovations of Tahoma and Cedar River Middle Schools, a GC/CM project.

Dick Prentke

Perkins Coie, Chair of Construction Group

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

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

Kasey Wyatt

OAC Senior Associate

Ms. Wyatt has 22 years of school construction and project management experience, including 9 GC/CM projects.

Ms. Wyatt will have a supporting role, consulting on the GC/CM procurement process. Ms. Wyatt is a highly skilled GC/CM practitioner. She builds highly collaborative designer-contractor-owner teams focused on the owner's needs throughout.

Heather Hocklander, AIA

Ms. Hocklander will lead the design. Heather has over 15 years of architectural experience with BCRA including schools and alternative project delivery methods. She has extensive GCCM experience as the lead Architect and Project Manager on projects with the Clover Park School District including two simultaneous school projects on two separate occasions – CPSD Tier I – Carter Lake Elementary and Hillside Elementary and CPSD Tier III – Beachwood Elementary and Evergreen Elementary. CPSD Tier I project required an aggressive schedule to be designed and permitted within 6 months which was completed successfully. In addition to Clover Park School District experience, Heather lead the design and construction administration effort for the Renovations at Tahoma and Cedar River Middle Schools. Her experience includes coordination of remodel/renovations, additions, safety and security upgrades, and school identity branding.

Organizational Controls

TSD has extensive project controls and reporting systems to effectively manage the scope, schedule and budget for the projects. OAC and TSD have implemented standard project budgeting tools and project management websites to manage communications and monitor progress on the capital projects. Budget tracking tools will establish the overall detailed budget to be approved by the TSD Board and then track actual expenses and forecast future costs. Schedule progress will be tracked against the master schedule.

Planned GC/CM Process

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

Preparation of the GC/CM RFP and selection process will be based on a TSD standard forms. This process will include selection criteria, interviews and final selection evaluations.

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 B](#)

9. Preliminary Concepts, sketches or plans depicting the project

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

At a minimum, please try to include the following:

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

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

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.

[No unresolved findings.](#)

Caution to Applicants

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

Signature of Authorized Representative

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

Should the PRC approve your request to use the GC/CM 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) Lori Cloud

Title: Assistant Superintendent

Date: 10/31/16

ATTACHMENT “A”

Team Experience

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

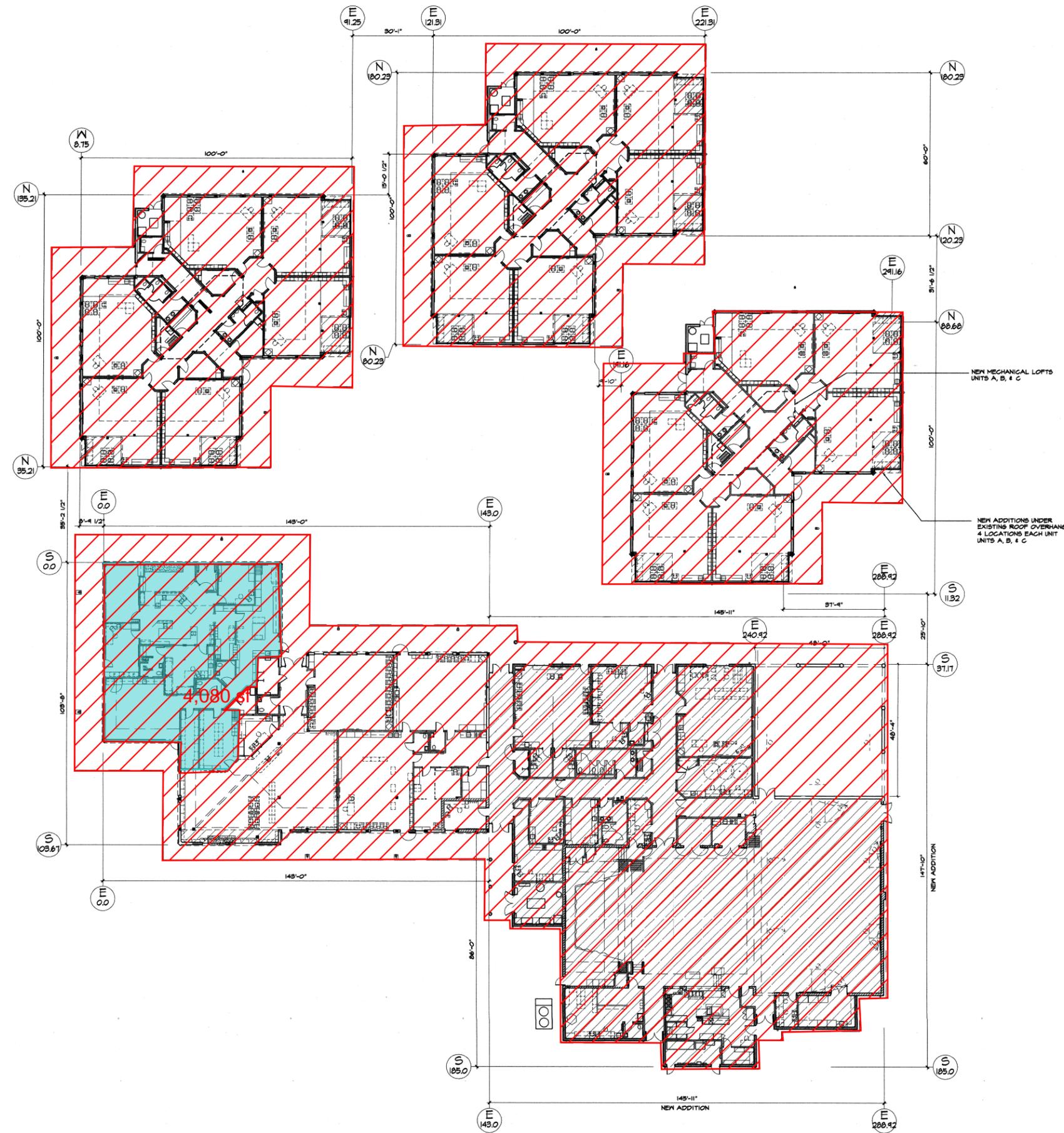
Name	Summary of Experience	Projects	Constructi on Budget	Procurement Type	Role During Project Phases		
					Pre-Design	Design	Construction
Lori Cloud	Assistant Superintendent/ Director of Finance & Operations Tahoma School District	Renovations to Tahoma & Cedar River Middle Schools	\$11.5M	GCCM	Project oversight on all phases		
		New Tahoma High School	\$122M	GCCM			
		Lake Wilderness Elementary	\$28.5M	GCCM			
		Historic Tahoma Middle School	\$8M	D/B/B			
		Tahoma Transportation Center	\$25M	D/B/B			
		Central Services siding and reroof	\$457K	D/B/B			
		Rock Creek ES siding and reroof	\$584K	D/B/B			
		Cedar River ES siding and reroof	\$809K	D/B/B			
		Glacier Park ES siding	\$345K	D/B/B			
Cindy Darcy	Project Manager Tahoma School District	Renovations to Tahoma & Cedar River Middle Schools	\$11.5M	GCCM	PM	PM	PM
		Tahoma High School & RLC	\$122M	GCCM	Purch	Purch	Purch
		Lake Wilderness ES	\$28.5M	GCCM	Purch	Purch	Purch
		Central Services Modernization	\$457K	D/B/B	PM	PM	PM
		Rock Creek ES Modernization	\$584K	D/B/B	PM	PM	PM
		Cedar River ES Modernization	\$809K	D/B/B	PM	PM	PM
		Glacier Park ES Modernization	\$345K	D/B/B	PM	PM	PM
		Tahoma Stadium & Athletic Fields	\$1.5M	KCDA	PM	PM	PM
Kasey Wyatt	Associate/Sr. Project Manager, OAC Services Inc.	Carter Lake Elementary School	\$25M	GC/CM	PM	PM	PM
		Hillside Elementary Schools	\$25M	GC/CM	PM	PM	PM
		Clarkmoor Elementary School	\$25M	GC/CM	PM	PM	PM
		Greenwood Elementary School	\$25M	GC/CM	PM	PM	PM
		Beachwood Elementary School	\$25M	GC/CM	PM	PM	PM
		New Tahoma High School	\$122M	GC/CM	PM	PM	PM
		The Evergreen State College	\$18M	GCCM	Advisor	Advisor	Advisor
		Lake Wilderness Elementary	\$28.5M	GC/CM	Advisor	Advisor	Advisor
		Evergreen Elementary	\$39M	GCCM	Advisor	Advisor	Advisor

		Renovations to Tahoma & Cedar River Middle Schools	\$11.5M	GCCM	Advisor	Advisor	Advisor
Heather Hocklander	Project Architect BCRA	Carter Lake Elementary School Hillside Elementary Schools Clarkmoor Elementary School Greenwood Elementary School Pt. Defiance Zoo and Aquarium Renovations to Tahoma & Cedar River Middle Schools	\$25M \$25M \$25M \$25M \$32M \$11.5M	GC/CM GC/CM GC/CM GC/CM GC/CM GC/CM	Advisor Advisor PM PM Advisor PM	PM PM PM PM Advisor PM	PM PM PM PM Advisor PM

**ATTACHMENT “B”
Public Project Experience**

The following table lists some (but not all) of Tahoma School District capital projects executed from 2009-2015.

Project Name	Budget		Delivery Method	Planning Start	Construction Start	Project Completion		Explanation of Budget or Schedule Overruns
	Planned	Actual				Planned	Actual	
Tahoma Transportation Center	\$5.9	\$5.7	D/B/B	Summer 08	Summer 08	Fall 10	Fall 10	
Exterior Envelope Modernizations	\$2.2M	\$2.1M	D/B/B	April 2014	June 2014	August 2014	August 2014	
Tahoma Senior High School and RLC	\$174M	\$156M	GCCM	June 2013	June 2015	May 2017	TBD	
Lake Wilderness Elementary	\$43M	TBD	GCCM	November 2014	June 2016	August 2017	TBD	
Renovations to Tahoma & Cedar River Middle Schools	\$13.8M	TBD	GCCM	September 2016	May 2017	August 2017	TBD	



SCOPE OF WORK DESCRIPTION:

1. UPGRADE ADMIN AREA - ADD SECURED VESTIBULE, REVISE ENTRY/SIGHTLINES, REPLACE CARPET FLOORING, UPDATE LAMINATES, PAINTING, REVISIONS TO MEP/FA/FP/SECURITY AS NEEDED.
2. SECURITY UPGRADES - INSTALL CAMERAS AND DOOR ACCESS CONTROL SYSTEM. ADD FENCING TO COMPLETE PERIMETER FENCING. ADD PRIVACY SCREENS TO EXISTING CHAINLINK FENCING
3. INSTALL ARTIFICIAL PLAY SURFACING (FOREVER LAWN) WITH NEW PLAYGROUND EQUIPMENT. MOVE OR DEMOLISH EXISTING PLAYGROUND EQUIPMENT.
4. COVERED PLAY - EXPAND EXISTING COVERED PLAY OR PROVIDE NEW COVERED PLAY AREA.
5. MONUMENT SIGN - REVISE EXISTING OR PROVIDE NEW AND PROVIDE ADDITIONAL WAYFINDING SIGNAGE
6. BOILER/WATER HEATER REPLACEMENT - REPLACE ALL EXISTING BOILERS, WATER HEATERS, AND CHILLERS.
7. PAINTING - PAINT PORTIONS OF EXISTING COVERED PLAY AREA AND INTERIOR AS NEEDED TO SUPPORT WORK NOTED ABOVE.
8. REROOF ALL ROOFS OF EXISTING BUILDINGS.

LEGEND

- UPGRADE ADMIN AREA - ADD SECURED VESTIBULE, REVISE ENTRY/SIGHTLINES, NEW CARPET FLOORING, UPDATE LAMINATES, PAINTING, REVISIONS TO MEP/FA/FP/SECURITY AS NEEDED.
- REROOF ALL ROOFS OF EXISTING BUILDINGS.

1 FLOOR PLAN
NTS



