

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): [Port Townsend School District No. 50](#)

(b) Address: [1610 Blaine Street, Port Townsend, WA 98368](#)

(c) Contact Person Name: [Brad Taylor](#)
Title: [Director of Facilities](#)

(d) Phone Number: [\(360\) 379-4513](#)
Fax: [None](#)
E-mail: btaylor@ptschools.org

2. Brief Description of Proposed Project.

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

The proposed Grant Street Elementary School Replacement project will provide a new 65,000 SF two-level elementary school facility that will primarily serve grades K-5. Also housed at the new facility will be the District's birth – 3 years old and preschool programs and their alternative OCEAN program for home schooled students in grades K-12. The new school will have the capacity to house up to approximately 650 students in all of the above mentioned programs. By building a new larger facility, the District will be able to return their fourth and fifth grade students from their current Blue Heron Middle School to the more age-appropriate elementary school, as well as house all students in a permanent structure in lieu of use of their current nine portable classrooms. The new school is a primarily one-story structure that contains an upper level of administrative, library and classroom spaces and a lower level of gym, cafeteria and kitchen spaces.

One of the early challenges for the design team and the GC/CM will be to create phasing plans that allows the existing school, portables and utilities to remain operational while the new school is being built. Bus drop-off and pick-up will need to be rerouted, parking areas redistributed and outdoor play areas relocated in order to accommodate new construction behind the existing school. Soil conditions and grading challenges will also need to be reviewed early, as the new building is built into existing steep slopes on the site, thus creating the school's lower and upper levels. Finally, school safety and academic performance will remain of paramount importance and will need to be reviewed for maintaining safe routes and minimizing disturbance during testing and learning. Once completed, the new school will be able to serve not only the District's current K-5 student population but also allow room for anticipated growth while they continue to develop their unique Maritime Discovery program.

3. Projected Total Cost for the Project:

A. Project Budget

Costs for Professional Services (A/E, Legal etc.)	\$3,250,000
Estimated project construction costs (including construction contingencies):	\$30,000,000
Equipment and furnishing costs	\$1,200,000
Off-site costs	\$300,000
Contract administration costs (Owner, CM etc)	\$1,700,000
Contingencies (design & owner)	\$750,000
Other related project costs (permits, insurance, moving, WSSP)	\$1,075,000
Sales Tax	\$2,700,000
Total	\$40,975,000

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 District is voting on a general obligation capital projects bond on February 9, 2016 in the amount of \$40,980,000. OSPI SCAP funds are not available for this project.

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
Selection of Architect	7/24/15	9/8/15
Educational Specifications	11/2/15	2/12/16
Select Owner's Project Manager	11/16/15	1/8/16
Procure GC/CM Services	2/1/16	4/1/16
Voters Approve Bond	2/9/16	2/9/16
Schematic Design	2/15/16	5/27/16
Design Development	5/30/16	9/30/16
Potential Early Site Construction	3/6/17	6/2/17
Bid/Buyout Packages	4/3/17	6/2/17
Complete New Building Construction	6/5/17	6/15/18
Pack & Move Out of Existing Building	5/28/18	6/22/18
Demolition & Finish Site Construction	6/8/18	8/24/18
Occupancy	8/27/18	

Please also refer to Attachment A: Project 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 – Project is not beyond completion of 30% drawings or schematic design.

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 Grant Street Elementary School Replacement Project involves complex scheduling, phasing and coordination between four schools and programs. Three separate educational programs are located on the Grant Street Elementary School site: the grades K-3 elementary school, multiple buildings that comprise of a District run and Head Start birth-3 years old and preschool programs, and the District's alternate education OCEAN program that supports home schooled students in grades K-12. These programs all have different daily start and end times, and some programs, such as OCEAN, have students and parents arriving and leaving the site throughout the day. They also involve the maintaining the safety of students at all ages from birth through 18. Having the GC/CM on board during design will help the design team explore viable and safe options for building, site access and utility phasing while maintaining operation for all three programs throughout construction.

The scheduled opening of the new school facility is also critical. Fourth and fifth grade students will be moving back to Grant Street after being housed at the District's Blue Heron Middle School due to lack of classroom space. Moving the fourth and fifth grade students back to the elementary school is an important and much desired cultural shift for the District, and it is important this shift take place over the summer as opposed to during the school year so as not to negatively impact student academic performance or emotional development. Early planning with the GC/CM will help assure this schedule is met.

- 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.

The existing Grant Street Elementary School must continue to operate during construction. The District does not have another facility to relocate the elementary school, preschool and alternative school programs to during construction. Operational impacts during construction include loss of the existing playfield and play equipment area where the new school building is being located, as well as loss of part of the existing bus drop off/pick up loop to the north and loss of staff parking to both the north and the south. The GC/CM will be able to help provide phasing solutions throughout construction for relocating play areas, bus loops and parking spaces while maintaining a safe site for students, staff and the public that also has construction activities coordinated with important students testing time periods and student/family public events.

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

Involvement of the GC/CM is critical during the design phase for the following reasons:

- Considering phasing scenarios and relocation plans required by constructing on an occupied site.
- Carefully vetting considerations related to utilities (new, old and temporary)
- Establishment of traffic patterns and traffic management plans for pedestrians, parents, buses, emergency vehicles, contractors, students, staff and deliveries.
- In formulating effective mitigation plans for noise, vibration, dust and other issues that might adversely impact an educational environment or staff and student health.

- Providing a “real world” perspective and alternatives for meeting the District’s sustainable design criteria. Having the contractor’s perspective on these products and systems during the design phase helps mitigate potential adverse impacts during and after construction.
- Helping to find the best way to balance the challenges of topography, adjacent woods and neighbors in a functional and cost effective manner.
- If the project encompasses a complex or technical work environment, what is this environment?

The project encompasses a complex/technical work environment due to the existing steep slopes directly west of the existing school. The new school facility will both be built into the steep slope as well as involve regrading into the new outdoor learning court area and from the new playfield location to the new main entry to provide ADA compliant site access to both. Utilizing the GC/CM allows careful planning of all steep slope/site grading activities to maintain a safe environment for the students and staff who may need to continue outdoor activities immediately adjacent as part of the educational curriculum.

- 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 – The project does not include work on any buildings of historical significance.

- 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 – The project is not heavy civil construction (roads, utilities, infrastructure).

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.

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 by reviewing design details, specification language and other features of the bidding documents. This review translates into higher quality of construction and reduced maintenance and operations costs to the community.

Finally, 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; and (3) the GC/CM process provides better control of safety on an occupied site.

- In the case of heavy civil GC/CM, why the heavy civil contracting procedure serves the public interest

N/A – The project is not heavy civil construction.

7. Public Body Qualifications

Please provide:

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

The Port Townsend School District is decreed as a “Public Body” authorized to utilize alternative public works contracting procedures by Chapter 39.10 of the Revised Code of Washington, as long as the school district receives appropriate certification as an Agency or by Project from the Project Review Committee of the Capital Projects Advisory Review Board.

The Port Townsend School District has assembled a team of experienced professionals that have successfully managed, designed, and advised on the construction of multiple GC/CM projects, as well as a wide variety of Design-Bid-Build construction projects.

For the Grant Street Elementary School Replacement project, Brad Taylor, Director of Facilities for the Port Townsend School District, will direct the effort from start to finish. Brad oversaw one of the state’s initial eighteen K-12 demonstration projects while he was the Director of Maintenance and Operations with Northshore School District.

Integrus Architecture will provide planning, design and construction administration services, with Brian Carter acting as Principal-in-Charge, David Van Galen acting as Design Principal, and Loretta Sachs acting as Project Manager.

The District is currently in the process of hiring an outside Project and Construction Manager, and interviews are scheduled for January 5, 2016. If possible, the District will provide updated information regarding their final selection at the January 28th Project Review Committee meeting.

Porter Foster Rorick LLP is our legal counsel and will be providing the GC/CM contract, general conditions, cost responsibility matrix, and other pertinent documents.

- 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 see Attachment B – Project Organizational Chart

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

PORT TOWNSEND SCHOOL DISTRICT

Brad Taylor, Director of Facilities

After starting his career with multi-million dollar commercial telecommunication projects, Mr. Taylor now has over 25 years of experience working in public school facilities. From 1991 through 2001, he was at the Northshore School District where he oversaw construction projects during both design and construction, with detailed review of project drawings and specifications during design and regular site visits and inspections during construction. When he left Northshore in 2001, he was their Director of Maintenance and Operations and was overseeing one of Washington State's first GC/CM pilot projects – Northshore Junior High school. His efforts at Northshore provided valuable feedback for future GC/CM policy, and he assisted other school districts like the Lake Washington School District in their GC/CM selection efforts. In 2002 he joined the Port Townsend School District as their Director of Facilities, where he started work on their pre-bond efforts for replacing the existing Grant Street Elementary School. He has also since then overseen multiple minor capital improvements to the District's elementary, middle and high schools

PORTER FOSTER RORICK LLP

Porter Foster Rorick LLP has over 30 years experience working with over 75 school districts in Washington State. They will provide construction law services for the Grant Street Elementary School Replacement project related to GC/CM contracts, bidding documents, public works processes such as prevailing wage, retainage and bonding, and construction claims and disputes. Their previous GC/CM experience includes providing assistance during the Northshore Junior High School GC/CM pilot project.

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 Alderwood Middle School for Edmonds School District, Vashon Island High School, 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).

David Van Galen, AIA, LEED AP, Design Principal

Mr. Van Galen is currently Lead Designer for the Park Place Middle School GC/CM project for the Monroe School District. He held the same role for the Alderwood Middle School and Vashon Island High School projects and is responsible for developing design concepts and carrying them through to completion. He has worked on all GC/CM projects at Integrus, as well as higher education GC/CM projects such as the UW Paul G. Allen Center, UW New Business School and WSU Intercollegiate

Center of Nursing while at another firm. 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.

Loretta Sachs, Project Manager

Ms. Sachs is currently the Project Manager for the Grant Street Elementary School Replacement project. She held the same role for the Vashon Island High School project. She is responsible for coordinating and managing design consultants, documentation production and, later in the project, the construction administration. Besides completing the GC/CM project of Vashon Island High School, she was also the Project Manager for a new 150,000 SF \$45.9 million Odle Middle School for the Bellevue School District and for the renovation and addition of a 47,000 SF \$12.8 million Evergreen Forest Elementary School for the North Thurston School District, as well as leading multiple K-12 projects during her 14 years at Integrus. She works closely with the GC/CM to solicit valuable systems and constructability feedback during design, reviews bid packages before construction begins, and evaluates all cost proposals during construction.

- 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.)

Please see Attachment C – Project Team Experience Matrix and short biographies above

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

Please see Attachment C – Project Team Experience Matrix and short biographies above

- 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.

Once hired, the Project and Construction Manager will be employed full time through the duration of the Grant Street Elementary Replacement project. The Project and Construction Manager will be fully funded from the project budget pending successful passing of the February 9, 2016 capital project bond.

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

Please see Attachment C – Project Team Experience Matrix and short biographies above

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

During the design phase the Project and Construction Manager maintains daily contact with the District's Director of Facilities to discuss project issues, workloads, financial and performance status, and decisions that need to be made. The roles and responsibilities of the District's Director of Facilities, Project and Construction Manager, Architect and their design consultants, and the GC/CM will be established in a matrix of responsibilities. The Project and Construction 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 design phase.

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 and Construction Manager and District's Director of Facilities 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, schedule for bidding, phased construction schedule, and determine if early procurement is necessary. These plans will be reviewed by the Project and Construction Manager, the District Director of Facilities, and the Architect. The Architect's design deliverables will be integrated with the GC/CM bidding and construction plan. Early and frequent meetings with the city 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.

Once construction begins the Project and Construction Manager's team will review construction related project issues, workloads, financial and performance status, and decisions that need to be made on a daily basis. Directives for changes will be approved expediently by the District. The Project and Construction Manager will monitor the various activities and deliverables established in the matrix, keeping the appropriate parties on point for their respective work throughout the life of the project. All facets of the project will be monitored by the District Director of Facilities.

- A brief description of your planned GC/CM procurement process.

Activity	Anticipated Date
GC/CM Review Board Approval	January 28, 2016
Issue and publically advertise RFQ for GCCM	February 4 & 11, 2016
Hold pre-RFQ submittal conference at site	February 16, 2016
Complete short-list, interviews, fee negotiations	Feb 17 – March 11, 2016
Approval by School Board on recommendation	March 21, 2016
Issue GC/CM Notice to Proceed	March 22, 2016

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

As developed by Porter Foster Rorick LLP, the District will use forms that include drafted revisions to the AIA's current standard forms A121 Agreement and A201

General Conditions. Those revisions will provide compliance with Washington State law and School District policies and procedures.

Also, Division 0 and Division 1 of the project specifications will address requirements and issues specific to the GC/CM alternate procurement method, also reviewed by Porter Foster Rorick LLP.

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

No major construction activity for the past six years. Please see Attachment D for the District's construction history dating back to 1994.

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 see Attachments E1 thru E5 for preliminary concept plans, site section and aerial image.

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.

None known.

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): Brad Taylor

Title: Director of Facilities, Port Townsend School District

Date: January 4, 2016