

Lake Washington School District GC/CM Certification

May 2016 – Project Review Committee Questions

Applicant responses in italics

1. Please clarify the staffing, time commitment, and roles of individuals from OAC and Parametrix that are proposed for the GC/CM projects going forward? If it is helpful to the understanding, including current or past roles and responsibilities, including time commitment.

Response: Our model for planning and managing the construction program, here at Lake Washington School District (LWSD), is to develop a small sustainable professional staff that is of the size and expertise to manage our long-term ongoing needs. Our goal is to provide an effective and efficient project management model that is appropriate and adaptable for any program change. For example, as we ramp up for major construction bond campaigns or other significant opportunities to deliver large projects, we purposefully and proactively seek to augment our expertise with that of professional consultants.

Consultant staffing requirements are carefully evaluated, based on the needs of the program, individual project scopes and schedules and the expertise and capacity of our in-house staff. Once selected, contract program and project management personnel are viewed as integrated LWSD team members, co-lactated with district staff at the Support Services Center in Redmond.

For our current bond program, we hired OAC and Parametrix in 2014, who combined have over 36 staff members with GC/CM experience and/or formal GC/CM training.

Project assignments and time commitments of OAC and Parametrix staff members for future GC/CM projects are based on the LWSD construction model, project schedules, individual skills and experience among other factors. Each staff member added to our LWSD team is personally interviewed and approved by Forrest Miller and Brian Buck. Our requirement is to tailor project management expertise with the project and to have that management be consistent through the life of the project.

Of the eight projects currently planned in the April 2016 bond program, the Kirk Elementary and Mead Elementary projects are likely GC/CM candidates and will have qualified project managers assigned in early 2017. In addition, the district's 15-year facility plan includes three additional bond measures to go to the community for consideration and approval. The next bond measure is scheduled for early in 2018. That group of projects includes at least two projects (Alcott Elementary and Kamiakin Middle School) that are appropriate for GC/CM and within the window of Agency status, if granted.

Refer to the staffing chart under Question 4 for additional details on OAC and Parametrix staff members assigned or potentially available.

2. In May 2014, your application for GC/CM agency certification was denied for the following reasons:
 - a. The Lake Washington School District has very little in house GC/CM experience
 - b. The school district is relying too much on the consultant for agency GC/CM certification
3. Please tell us exactly what changes have been made during the past two years to address these concerns and why you believe they have been resolved.

Response: *Our May 2014 PRC application omitted detail on our extensive in house GC/CM experience including that of the Support Services Director, Forrest Miller and other LWSD staff members. Some critical LWSD staff members with GC/CM experience in 2014 were not shown in that application including Barbara Posthumus, Director of Business Services and Scott Emery, Risk, Health and Safety Manager. The current application better represents the district's GC/CM experience.*

Since May 2014 the LWSD has added to its expertise and experience:

- *Brian Buck, Associate Director of Support Services has completed GC/CM training.*
- *The \$145M Juanita High School Rebuild and Expand GC/CM project (approved by the PRC in February) was procured and awarded. All LWSD staff members shown on this application participated in procurement and contracting and are actively involved in pre-construction planning.*
- *Pat Sprague has been recruited and dedicated 100% to the LWSD program. Pat is a 24 year veteran of Microsoft Corporation Real Estate & Facilities with over \$1B in completed projects—all delivered in a collaborative, negotiated environment very similar to the LWSD GC/CM methodology.*

Note: *The May 2014 LWSD Application for Agency Approval received 64% majority approval—one vote short of the 2/3 majority required by PRC By-Laws.*

4. For all OAC consultants assigned, please provide a chart of current projects, role and percent of time dedicated to those projects in addition to percent of time dedicated to Lake Washington School District. The chart should demonstrate that OAC has the capacity and experience in GC/CM.

Response: *In addition to LWSD staff members dedicated to the program, current OAC and Parametrix staff members assigned or potentially available are shown below including current commitments for LWSD and other projects. Our program leadership team is currently in the process of completing the staffing plan to meet project delivery needs.*

OAC and Parmetrix have GC/CM trained and qualified staff members beyond those shown below to manage projects and support the overall program when needed.

Staff Member	LWSD Role	GCCM Experience	GCCM Trained	Private Negotiated Experience-- Like GC/CM	Current LWSD Commitment	Other Projects
Currently Assigned to LWSD						
Daniel	Chandler	Program Manager			80%	20%
Pat**	Sprague	Deputy Program Manager	some	Jun-16	100%	0%
Eric	Smith	GC/CM strategy advisor			2%	60%
Gregory	Brown	Senior Program Manager			5%	80%
Howard *	Hillinger	Principal Consultant			5%	50%
Michael	Romero	Senior Project Manager	some		100%	0%
Stacy**	Shewell	Project Manager	some	Jun-16	100%	0%
Andrew	Sahl	Project Manager	some		100%	0%
Avery	Lindsey	Project Engineer			80%	20%
Katherine	Getchell	Project Controls Manager			5%	80%
Judy	Sawin	Senior Project Coordinator			10%	80%
Potential Staff for Future LWSD Projects						
Ethel	Vural	Senior Project Manager				Likely for LWSD Assignment
Phillip	Baker	Senior Project Manager				Being considered for LWSD
David	Petersen	Senior Project Manager				Being considered for LWSD
Greg*	Stidham	Senior Project Manager				
Paul*	Popovich	Senior Project Manager				
Daniel*	Cody	Senior Project Manager				
Wesley	Bergquist	Project Manager				
Houman	Nabavi	Project Manager				
Tansy	Shigley	Project Manager				
Krista*	Lutz	Project Manager				
Richard*	Moewe	Project Manager				
Kellie*	Bower	Project Manager				
Andrew	Heiner	Project Engineer				

* Parametrix staff member

** scheduled for GC/CM training in June 2016

5. Who is responsible for determining the delivery method? The application submitted mentions this is the responsibility of; Deputy Superintendent; Director of Support Services and the Design and Construction Advisory Committee. Please provide clarification of the decision making process and who is responsible.

Response: Forrest Miller, LWSD Director of Support Services, is responsible for the delivery method decisions on each project.

Janene Fogard, Deputy Superintendent relies on Forrest Miller for delivery method determinations in all cases including DBB, GC/CM, Small Works, ESCO, JOC and potentially D-B in the future.

The Design and Construction Advisory Committee (Advisory Committee) has no direct role in the delivery method decision. The district assembled this independent expert committee in response to a recommendation from a citizen's task force formed to plan the recently approved bond issue. The Advisory Committee gives input on any major project design or construction issue.

6. What is the process for OAC advising on delivery methods? Who is this advice given to?

Response: The delivery method decision for each project is discussed at our weekly Bond Projects Meeting comprised of Forrest Miller, Brian Buck, Pat Sprague and Dan Chandler. Delivery method selection is a group discussion by these individuals. After collaborative dialog on each project, Forrest Miller makes the decision on the project delivery method.

All GC/CM delivery decisions are based on statute requirements, schedule, risks, site occupancy and other factors. Should the District receive Agency Approval, this process will be formally documented for each GC/CM project.

7. What is the term of the contract with OAC?

Response: The following clause is from the LWSD-OAC Construction Management Master Agreement.

<p style="text-align: center;">ARTICLE 5 DURATION OF BASIC SERVICES</p> <p>5.1 TOTAL DURATION OF BASIC SERVICES. The duration of Basic Services under this Agreement shall be May 1, 2014 and ending on December 31, 2018. This Master Agreement shall be renewable upon mutual agreement.</p>
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It is the full intent of the district to maintain this relationship through the period of Agency Approval 2016-2019 at a minimum and for all projects in the 2016 and upcoming 2018 bond programs extending through 2021.

Our school district retained OAC in 2014 following an exhaustive, open solicitation process. The district is very satisfied with the relationship and service to date.

Since the LWSD-OAC contract was executed, the district has accomplished the following with OAC's help:

- Delivered \$60M in small capital projects including building additions, interior alterations portable classrooms, sports field upgrades and capital maintenance projects.*
- Planned and passed a \$398M capital bond measure covering eight new projects following one unsuccessful attempt in 2010 and two attempts in 2014. This effort involved a year-long community engagement process, extensive planning, options analysis and budget preparation.*
- Completed preliminary planning on future bond measures for 2018, 2022 and 2026 to accommodate continued enrollment growth through 2030.*