

State of Washington
PROJECT REVIEW COMMITTEE (PRC)
GC/CM PROJECT APPLICATION
To Use the General Contractor/Construction Manager (GC/CM)
Alternative Contracting Procedure

The PRC will only consider complete applications: Incomplete applications may result in delay of action on your application. Responses to Questions 1-7 and 9 should not exceed 20 pages (*font size 11 or larger*). Provide no more than six sketches, diagrams, or drawings under Question 8.

Identification of Applicant

- a) Legal name of Public Body (your organization): South Whidbey School District No. 206
- b) Mailing Address: 5476 Maxwellton Road, Langley, WA 98260
- c) Contact Person Name: Dr. Josephine Moccia Title: Superintendent
- d) Phone Number: (360) 221-6808, ext. 2245 E-mail: jmoccia@sw.wednet.edu

1. Brief Description of Proposed Project

- a) Name of Project: South Whidbey School District – Facilities Modernization & Upgrades Bundle
- b) County of Project Location: Island County
- c) Please describe the project in no more than two short paragraphs. (*See Example on Project Description*)
 The South Whidbey School District is located in Langley Washington and serves approximately 1,200 students, and their families, from the surrounding community. The District’s schools are comprised of an Elementary School and a combination High School/Middle School facility. Both facilities are located in a rural area, just south of town. The Elementary School sits on a 54-acre site and is an approximately 49,577 sf, single-story, wood-framed building that was built in 1988. The Elementary School has had no major renovations since it was constructed and many of the systems are near, or beyond, the end of their useful life. High School/Middle School sits on a 48-acre site and is an approximately 146,200 sf, two-story, wood-framed building. The original building, 90,200 sf was constructed in 1982. The High School/Middle School had one major addition and renovation 1997. However, the remodel work did not replace the original building systems and many of the systems are near, or beyond, the end of their useful life.

This project will provide much needed modernizations and upgrades to the District’s Elementary School, Middle School/High School and Stadium facilities. Those upgrades and modernizations will focus on systems and infrastructure, accessibility & inclusiveness, safety and security, 21st century learning, identity and wayfinding, sustainability and energy efficiency, ease of operation and maintenance, and extending the useful life of the facilities.

- d) Applying for permission to utilize Alternative Subcontractor Selection with this application? **No**
 (*if no, applicant must apply separately at a later date utilizing Supplement B*)

2. Projected Total Cost for the Project:

A. Project Budget

Costs for Professional Services (A/E, Survey, Geotech, Legal etc.) (12%)	\$10,056,000
Estimated project construction costs (GMP + GCCM Contingency) (67%)	\$56,146,000
Equipment and furnishing costs (3%)	\$2,514,000
Off-site costs (1%)	\$838,000
Contract administration costs (owner 1%, Pmx 3%)	\$3,352,000
Contingencies (design & owner) (Owner Project Contingency min. of 5%)	\$4,190,000
Other related project costs (Permit Fees, Auditor, Cx Agent, etc)	\$1,555,328
Alternative Subcontractor Selection costs	\$NA
Sales Tax (8.8% of Const+Off+Site+FFE)(6.55%)	\$5,148,672
Total	\$83,800,000

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*

This project will be funded by a \$79.8M Capital Bond that was passed by the voters of South Whidbey School District in November 2023. The District is also working with OSPI to secure SCAP funding. For the purposes of this application, we are assuming \$4M of SCAP funding from OSPI, based on preliminary estimates.

3. Anticipated Project Design and Construction Schedule

Please provide:

The anticipated project design and construction schedule, including:

- a) Procurement; *(including the use of alternative subcontractor selection, if applicable)*
- b) Hiring consultants if not already hired; and
- c) Employing staff or hiring consultants to manage the project if not already employed or hired. *(See Example on Design & Construction Schedule)*
- d) Provide an updated schedule to include Alternative Subcontractor Selection Procurement process. *(If applicable)*

PRC Schedule	Start	Finish
Develop PRC Application	March 26, 2024	April 19, 2024
Submit PRC Application		April 22, 2024
Develop PRC Presentation	April 22, 2024	May 22, 2024
PRC Presentation		May 23, 2024
PRC Verbal Approval to Utilize GC/CM		May 23, 2024
GC/CM Procurement Schedule	Start	Finish
Develop RFP Document	April 1, 2024	May 31, 2024
Develop RFFP Document	June 3, 2024	July 18, 2024
First publication of RFP for GC/CM Services		June 3, 2024
Second publication of RFP for GC/CM Services		June 10, 2024
Project Information Meeting		June 12, 2024
RFP Submittal (SOQ) Deadline		June 28, 2024
Review & Score RFP Submittals (SOQs) Received	July 1, 2024	July 10, 2024
Notify Submitters of Most Highly Qualified GC/CMs & Invite to Interview		July 11, 2024
Interviews with Short-Listed Firms	July 17, 2024	July 18, 2024
Notify Shortlisted Firms of Most Highly Qualified Firms & Invite to Submit responses to RFFP		July 19, 2024
RFFP Submittal Deadline & Opening		Aug 2, 2024
Notify Submitters of Scoring and Most Qualified GC/CM		Aug 5, 2024
Board Approval of GC/CM Selection and Authorization to Negotiate Pre-Con Services Agreement		Aug 14, 2024
Statute Required Waiting Period	Aug 6, 2024	Aug 9, 2024
Negotiate Terms and Conditions of Agreement and Pre-Con Work Plan	Aug 12, 2024	Aug 23, 2024
Pre-Con Work Plan Due From GC/CM		Aug 23, 2024
Board Approval of GC/CM Work Plan and Agreement		Sept 11, 2024

GC/CM Agreement w/ Pre-Con Services Executed		Sept 13, 2024
GC/CM Notice to Proceed		Sept 16, 2024
GC/CM Pre-Construction Services	Sept 16, 2024	Aug 2025
Design & Permitting Schedule	Start	Finish
Schematic Design (0-30%)		Oct 2024
Design Development (30-60%)	Oct 2024	Jan 2025
Early Procurement of Long Leadtime Items	TBD	TBD
Permit/GMP Documents (60-90%)	Feb 2025	May 2025
Permitting	May 2025	Aug 2025
GMP Negotiation (90% CD's)	June 2025	June 2025
Board Approval of GMP and GMP Amendment Executed		July 2025
Construction Documents (90-100%)	June 2025	Aug 2025
Permit Available		Sept 2025
Construction Schedule	Start	Finish
MS/HS School Subcontractor Bidding & Contracting	Aug 2025	Sept 2025
Phased Construction at MS/HS Campus	Oct 2025	July 2027
MS/HS Substantial Completion with Occupancy Permit		July 2027
MS/HS Final Completion/Closeout	Aug 2027	Sept 2027
MS/HS "Move-in"	Aug 2027	Aug 2027
First Day of School 2027/28 School Year		Sept 7, 2027
MS/HS Warranty Period	Aug 2027	July 2028
Elementary School Subcontractor Bidding & Contracting	Feb 2027	Mar 2027
Phased Construction at Elementary School	Apr 2027	July 2028
Elementary School Substantial Completion with Occupancy Permit		July 2028
Elementary School Final Completion/Closeout	Aug 2028	Sept 2028
Elementary School "Move-in"	Aug 2028	Aug 2028
First Day of School 2028/29 School Year		Sept 5, 2028
Elementary School Warranty Period	Aug 2028	July 2029

Note that the schedule above is preliminary and is subject to change once the GC/CM is on board and we have the opportunity to collaborate on logistics, phasing and schedule.

4. 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 nature of this project being a bundle of work that will be constructed over the school year when the facilities will be occupied and operational and during the summer months while the facility will be empty.

The project offers itself to the potential of three schedule/phasing options that we would like to have the GC/CM weigh in on.

- Construction takes place concurrently on both sites.
- Construction is phased so that it takes place on both sites concurrently, but staggered to allow trades to move from the first site to the second site as specific trade work wraps up at the first site.
- Construction is phased so that it takes place and is completed in its entirety at the first site before construction begins at the second site.

The other issues that would work into this category might be the consideration for the scheduling of early procurement of long lead time materials and equipment as well as whether we should consider early permit/construction packages for some of the contract work.

- If the project involves construction at an existing facility that must continue to operate during construction, what are the operational impacts on occupants that must be addressed?

Note: Please identify functions within the existing facility which require relocation during construction and how construction sequencing will affect them. As part of your response, you may refer to the drawings or sketches that you provide under Question 8.

The facilities will be required to remain occupied and operational during construction. Being a small District, there is limited space to move staff and students around to avoid construction activities. The District believes that there are some spaces within each facility that are currently not being utilized as efficiently as they might be able to be used and, by increasing the efficiency of the use of the space that they have, they may be able to move student/staff within the buildings to avoid some construction activities. It will be critical to have a GC/CM partner on our team to help us work through the complexities and allow the facilities to continue to maintain occupancy and minimize impacts on students, staff and operations.

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

Refer to the responses above. Additionally, having the involvement of the GC/CM as a member of our team during design will be beneficial to this project. Having the GC/CM involved during design to give input on QA/QC of drawing and specifications, constructability, construction sequencing, cost and value engineering and scheduling/phasing is critical to a successful project that will meet the needs of the District, minimize operational impacts and can be built on time and within budget.

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

Not applicable.

- 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?

Not applicable.

- 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?

Not applicable.

5. 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 Public Benefit related only to Alternative Subcontractor Selection, use Supplement A or Supplement B, if your organization decides to use this selection process. Refer to Question No. 11 of this application for guidance*). For example, your description must address, but is not limited to:

- How this contracting method provides a substantial fiscal benefit; or

Manage Costs in an Inflating Market – Having a GC/CM Contractor as a team member during the design phase as a collaborative member of the team will help to focus design efforts to more effectively explore solutions that are viable, constructable, cost effective and efficient, thus enabling the team better control of construction costs and time. Having GC/CM involvement during the design process will also help plan for, and mitigate, the potential for impacts due to cost escalation, product availability problems, and labor shortfalls. This will also help control cost and schedule impacts.

Real Time, Market Based Cost Estimates – The construction market in the greater Puget Sound region has recently been experiencing unprecedented cost escalation and price increases to materials and labor. GC/CM contractor partner can utilize real time, current market pricing to help the team validate scope and budgeting during the design process. The GC/CM delivery process assists in making the project more fiscally responsible and viable by having the GC/CM participate in constructability reviews, value analysis, design-team/contractor/Owner coordination, and the use of design phase overlap to accelerate project completion. All of these measures have the potential for lowering construction costs and stretching the buying power of the Owner’s budget.

More Responsive and Responsible Bids – A GC/CM contractor is able to exercise greater control in the organization and assembly of bid packages, the establishment of sub-bidder qualifications, and the selection of subcontractors compared to the design-bid-build process. This reduces the potential for non-responsible bidders and the submittal of non-responsive bids. It also reduces the potential for constructability errors and omissions and scheduling issues being raised after bids have been received and contracts executed with subcontractors.

Allocation of Risk – The GC/CM process can reduce risks and claims in the following manner:

- A GC/CM Contractor is highly motivated to maintain a schedule that they had a hand in developing.
 - The GC/CM delivery process offers an “open book” cost accounting of the work which will allow the team to track costs and forecast effectively.
 - The GC/CM understands the nature and scope of the construction work long before it bids, which reduces the “learning curve” associated with design-bid-build projects and lowers the potential for surprises that can become added cost/time during construction.
 - The GC/CM will participate in setting schedule for and packaging the scope of bid packages to fit the marketplace. This will help set realistic expectations before work packages are put out to bid, will lower the risk of non-responsible subcontractor bidding, and will improve cost management and control.
 - The GC/CM participates in and ultimately “owns” pre-construction cost estimates and budget reconciliation leading up to the MACC negotiations, resulting in greater cost certainty.
 - The GC/CM will participate in value-engineering and constructability reviews early in the design process. This helps ensure cost-effective and value-based design and construction solutions.
 - The potential for serious construction claims and litigation is greatly diminished because of the collaborative relationships among the GC/CM, Owner and design team.
- How the use of the traditional method of awarding contracts in a lump sum is not practical for meeting desired quality standards or delivery schedules.

Better Coordination of Materials and Equipment Purchases – Utilizing a GC/CM contractor partner can result in better coordination of materials and equipment purchases including subcontractor coordination, vendor coordination, timing, procurement, delivery, off-loading, storage, rough-in and installation resulting in benefit to the Owner. This level of coordination is often difficult to achieve on a design-bid-build project.

Better Ability to Accommodate Activities at Site – A GC/CM contractor can play a critical role during the design phase in preparing a feasible and safe construction plan. This is especially beneficial for a project of this type where construction will occur at a site that is located in an environment with access points, streets and infrastructure that must be maintained as operational. This opportunity for construction planning input during the design phase is not available on a design-bid-build project.

Complex Scheduling and Phasing – The preparation of a construction schedule and phasing plan by a GC/CM contractor in support of the design team, provides a more detailed, market driven, accurate and realistic CPM schedule. This schedule will better address potential construction impacts and will assist District staff and stakeholders of upcoming construction phases, construction logistics and other potential disruptions or impacts related to the construction project.

- In the case of heavy civil GC/CM, why the heavy civil contracting procedure serves the public interest.
Not applicable.

6. Public Body Qualifications

Please provide:

- A description of your organization’s qualifications to use the GC/CM contracting procedure.
South Whidbey School District has “stacked the deck” in our favor and we have augmented our team with consultants who have extensive alternative project delivery experience. Integrus will lead our design team and they bring along with them an extensive background in GC/CM project delivery, as well as extensive background in the design of K-12 facilities. We have contracted with Parametrix to provide GC/CM advisory, GC/CM procurement and PM/CM consultant services throughout the life of our project. As a team member, Parametrix brings extensive GC/CM experience, knowledge of the statutory requirements, industry best practices and lessons learned related to GC/CM delivery. Last, we have enlisted the services of Pacifica Law Group to help us develop our contract documents and advise us on legal issues and best practices related to RCW 39.10 and GC/CM delivery.
- 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 Example on Project Organizational Chart)
Refer to Exhibit A for Project Organizational Chart.
- Staff and consultant short biographies (*not complete résumés*).

Dr. Josephine Moccia – Superintendent (South Whidbey School District)

Role: As Superintendent of a relatively small school district, Dr. Moccia will take the opportunity to provide steady participation and leadership in this capital projects process. With her institutional knowledge of this District (Superintendent since 2011), she will help lead various Districts teams through design and construction decisions by ensuring timely responses and clear messaging to the school board. Dr. Moccia will be the authorizing figure for many issues in addition to the School Board.

Relevant Experience: Dr. Moccia has been the Superintendent at SWSD since 2011. Prior to that she worked at other Districts in NY state where she was involved in various capital improvement projects. This would be her first experience with GC/CM project delivery.

The following table lists relevant projects for Dr Moccia.

Project	Project Value	Delivery Method	Tasks Performed	Time Involved
Seismic Retrofits	\$1.4 M	D/B/B	Superintendent	2018-2023
Elementary School Mech Improvements	\$623 K	D/B/B	Superintendent	2017-2019
Elementary School Kitchen TI	\$330 K	D/B/B	Superintendent	2018
Access Controls & Security Upgrade	\$562 K	D/B/B	Superintendent	2017-2018
SWSD Water Treatment Facility	\$1.2 M	D/B/B	Superintendent	2010

Dan Poolman – Director of Business & Operations (South Whidbey School District)

Role: Dan oversees Finance and given his tenure has played a role in overseeing the Operations of the District so is in a position to add value to the planned capital improvement process. With his knowledge of the District’s facilities and operations, he is in a leadership position within the District to oversee planned improvements and to work consistently with Parametrix, the Design team and eventually the GC/CM. Dan will also help to filter information to Dr. Moccia as necessary to ensure that her time commitment to these projects are efficient and effective.

Relevant Experience: Dan has overseen and helped manage many of the District’s maintenance and small capital improvement projects over the past 19 years. Although he has not participated in a GC/CM project in the past, his knowledge of the District’s policies and his general knowledge of building systems and past District projects

makes him a valuable team member for these proposed capital projects.

The following table lists relevant projects for Dan Poolman.

Project	Project Value	Delivery Method	Tasks Performed	Time Involved
Seismic Retrofits	\$1.4 M	D/B/B	Project Managed	2018-2023
Elementary School Mech Improvements	\$623 K	D/B/B	Project Managed	2017-2019
Elementary School Kitchen TI	\$330 K	D/B/B	Project Managed	2018
Access Controls & Security Upgrade	\$562 K	D/B/B	Project Managed	2017-2018
SWSD Water Treatment Facility	\$1.2 M	D/B/B	Project Managed	2010

Rebecca Baibak – Architect, Principal in Charge (Integrus)

Role: As Principal in Charge for Integrus, Rebecca oversees design and all consultants associated with the design process. She will have regular contact with District leadership.

Relevant Experience: As leader of the K-12 Education group at Integrus Architecture, Rebecca has extensive GC/CM experience, including one of the first pilot projects, Northshore Junior High with the Northshore School District, and most recently on the Rush Elementary School Modernization in Redmond, WA for the Lake Washington School District. She is responsible for overseeing the production of all project phases-and has led many large, complex, and phased occupancy school projects in recent years. Rebecca 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 of the owner, the design team, and construction team. This helps to establish project parameters early in the process and work together in creating solutions that meet the established parameters by balancing aesthetic consideration with schedule and budget constraints.

The following table lists relevant projects for Rebecca Baibak.

Project	Project Value	Delivery Method	Tasks Performed	Time Involved
Einstein Middle School	\$65 M	GC/CM	Principal in Charge	2017 - 2020
Juanita High School	\$98.3 M	GC/CM	Principal in Charge	2016 - 2020
Leota Middle School	\$47 M	GC/CM	Principal in Charge	2022- Present
Park Place Middle School	\$50.6 M	GC/CM	Principal in Charge	2015 - 2018
Lake Grove Elementary School	\$29.9 M	GC/CM	Principal in Charge	2017 - 2020
Mariner High School Modernization	\$19 M	GC/CM	Principal in Charge	2020- Present
Minor Lake Elementary School	\$29.8 M	GC/CM	Principal in Charge	2017 - 2020
Wild Wood Elementary School	\$28.9M	GC/CM	Principal in Charge	2017 - 2020

Jeff Luedeman – Architect, Project Manager (Integrus)

Role: As Project Manager for Integrus, Jeff is responsible for leading the entire design team through all phases of design, permitting and construction. He will have regular contact with the District at many levels, ensuring that the design is addressing their project needs.

Relevant Experience: Jeff has spent a majority of his carrier working in alternative delivery method projects. Almost all of his work in the K-12 realm represents complex, phased construction projects. He is adept at identifying project risks and leading the team to help mitigate them.

The following table lists relevant projects for Jeff Luedeman.

Project	Project Value	Delivery Method	Tasks Performed	Time Involved
Einstein Middle School	\$65 M	GC/CM	Project Architect	2017 - 2020
Juanita High School	\$98.3 M	GC/CM	Architect	2016 - 2020
Leota Middle School	\$47 M	GC/CM	Project Architect	2022- Present
Park Place Middle School	\$50.6 M	GC/CM	Construction Admin.	2016 - 2018
Hazen High School	\$54 M	GC/CM	Project Manager	2023- Present

Jim Dugan – Principal in Charge and GC/CM Advisor (Parametrix)

Role: As the principal in charge for Parametrix, Jim will be the point of contact with the District on all issues related to the GC/CM Advisor/Consultant contract and Parametrix staff. As the GC/CM Advisor to the project, Jim will be responsible for working with the team to consult, recommend and advise the team as required to ensure that the team is proceeding in a manner that meets the intent of RCW 39.10 as it relates to GC/CM project delivery.

Relevant Experience: Jim has over 45 years of experience managing the planning, design, engineering, and construction of industrial, commercial, and institutional projects in both public and private markets. With formal training in civil engineering and project management, he provides his clients with project management and leadership skills needed to plan, hire, and manage design and construction consultants and contractors consistent with program requirements, budget restrictions, and schedule requirements, as well as work collaboratively with all agencies having jurisdiction. Jim is highly skilled at alternative project delivery (GC/CM and D/B), long-range strategic planning and scheduling, budget forecasting and compliance to the plan, public speaking/presentations, collaboration with stakeholders and conflict resolution and claims mitigation.

Since 2016, Jim has served as a member of the State’s Project Review Committee (PRC) where, along with colleagues from the construction industry and public agencies, he volunteers his time to review applications, hear presentations and make recommendations on public agencies wishing to utilize alternative project delivery methods on publicly funded projects. In 2019 and 2020, Jim filled the consecutive roles of PRC Vice Chair and Chair and in 2023 was appointed to a three-year additional term as a PRC Member. The following table lists recent and relevant GC/CM projects for Jim.

Project	Project Value	Delivery Method	Tasks Performed	Time Involved
Everett Municipal Building Renovations, City of Everett	\$26.5M	GC/CM	GC/CM Advisor	2022- present
Redondo Sewer Treatment Plant Electrical & Odor Control Upgrade, Lakehaven Water and Sewer District	\$21.2M	GC/CM	GC/CM Advisor	2021- present
New Headquarters, Lakehaven Water and Sewer District	\$50M	GC/CM	GC/CM Advisor	2019- present
Columbia River High School Mod/Add, Vancouver Public Schools	\$21.4 M	GC/CM	GC/CM Advisor	2018 - 2023
Downtown Elementary School, Vancouver Public Schools	\$39.5 M	GC/CM	GC/CM Advisor	2018 - 2023
Three Elementary School Replacement Program, Auburn School District	\$157.7 M	GC/CM	GC/CM Advisor	2018 - 2022
New Headquarters, Chelan County	\$136.36M	GC/CM	GC/CM Advisor	2017- present

Project	Project Value	Delivery Method	Tasks Performed	Time Involved
PUD				
RI & RR Dam Support Facilities, Chelan County PUD	\$70 M	GC/CM	GC/CM Advisor	2017- present
Grant Elementary School, Tacoma Public Schools	\$34.9 M	GC/CM	Program Manager, GC/CM Advisor	2017 - 2019
Birney Elementary School, Tacoma Public Schools	\$39.15 M	GC/CM	Program Manager, GC/CM Advisor	2017 - 2020
Mann Middle School Replacement, Clover Park School District	\$68 M	GC/CM	GC/CM Advisor	2017 - 2020
Four Elementary School Replacement Program, Auburn School District	\$208.0 M	GC/CM	GC/CM Advisor	2017-2022

Tom Rooks – Project Manager/Construction Manager (Parametrix)

Role: Role: Tom’s primary role will be to provide project management and construction management for capital projects during design and construction. He will collaborate with the District staff, A/E consultants and contractors during design and construction and will also provide coordination with key stakeholders, including District management, associated facilities staff, and individual school staff.

Relevant Experience: Tom brings experience to the design and construction industry as an architect, project manager, and construction manager. Tom has worked on both public and private projects primarily in the Pacific Northwest, with a focus on public K-12 work over the last several years. These K-12 projects have been a collection of large and small, complex and straight forward, varied delivery approaches and almost always on occupied sites. Tom understands the risks inherent in these types of public projects and the management strategies needed to mitigate these risks. Tom’s attention to detail and broad professional experience enables him to bridge the gaps between owner, design team, and contractor. Tom leads with a very diplomatic style, which encourages collaboration, and is able to be both fair and firm to ensure that projects progress smoothly, remain on schedule, and on budget. The following table lists relevant projects for Tom.

Project	Project Value	Delivery Method	Tasks Performed	Time Involved
Mount Vernon LaVenture Middle School Addition, Mount Vernon School District	\$12 M	PDB	CM	2023- present
Mount Vernon Old Main - High School Modernizations, Mount Vernon School District	\$29 M	GC/CM	PM/CM	2020 - 2023
Mount Vernon Fine Arts - High School Modernizations, Mount Vernon School District	\$9.0 M	GC/CM	PM/CM	2019 - 2020
Small Capital Projects, Everett Public Schools	\$1.2 M	D/B/B	PM/CM	2023
Elkridge Elementary School & Wilkeson Elementary School Modernizations and Additions, White River School District	\$36.0 M	D/B/B	CM	2017 - 2020

Dan Cody – GC/CM Procurement Manager & Advisor (Parametrix)

Role: As the GC/CM Procurement Manager, Dan will be responsible for GC/CM procurement including development of the RFP and RFFP documents, Interview criteria and scoring criteria and project score sheets. During design and construction, Dan will also be available to provide support, mentoring and GC/CM advise to the District and other team members. He will also be available to monitor the work of the A/E and GC/CM in order to ensure that they are operating within their contractual obligations to the District.

Relevant Experience: Dan is a Senior Construction Manager/Project Manager with Parametrix. A licensed architect, he has over 36 years of experience in the design and construction industry and has developed the ability to manage all phases of projects from programming through construction closeout. Dan has been heavily involved in design, production and construction administration for a large number and variety of educational, institutional, and commercial projects. Dan’s expertise includes programming, budget analysis, space planning/design, project team coordination, quality control review, production and construction administration. He has extensive experience in the educational, commercial and public sector markets, providing design and construction services on projects throughout western Washington.

Dan successfully completed the AGC GC/CM training seminar in January 2016. Since that time, he has been closely involved in the GC/CM procurement process for more than thirty major projects totaling nearly \$1.65B in total project value. Dan is a proponent of the GC/CM delivery method and believes that it will soon become the preferred delivery method used by public agencies for projects that pose interesting challenges and opportunities. The table below identifies some of Dan’s most recent and relevant GC/CM project experience.

Project	Project Value	Delivery Method	Role	Timeframe
Everett Municipal Building Renovations, City of Everett	\$26.5M	GC/CM	GC/CM Procurement, PM Support	2022- present
Lakehaven Redondo Sewer Treatment Plant Electrical & Odor Control Upgrade	\$21.2M	GC/CM	GC/CM Procurement, GC/CM Advisor	2021- present
New Headquarters, Lakehaven Water and Sewer District	\$50M	GC/CM	GC/CM Procurement, Project Manager	2019- present
Columbia River High School Mod/Add, Vancouver Public Schools	\$21.4 M	GC/CM	GC/CM Procurement	2018
Downtown Elementary School, Vancouver Public Schools	\$39.5 M	GC/CM	GC/CM Procurement	2018
Three Elementary School Replacement Program, Auburn School District	\$157.7 M	GC/CM	GC/CM Procurement, GC/CM Advisor	2018 - 2022
Chelan County PUD – RI & RR Dam Support Facilities	\$70M	GC/CM	GC/CM Procurement	2017
Grant Elementary School, Tacoma Public Schools	\$34.9 M	GC/CM	GC/CM Procurement	2017
Birney Elementary School, Tacoma Public Schools	\$39.15 M	GC/CM	GC/CM Procurement	2017
Mann Middle School Replacement, Clover Park School District	\$68 M	GC/CM	GC/CM Procurement	2017
Four Elementary School Replacement Program, Auburn School District	\$208.0 M	GC/CM	GC/CM Procurement, GC/CM Advisor	2017-2022

Zak Tomlinson – External Legal Counsel (Pacifica Law Group)

Role: Provide legal guidance for the Project with respect to the requirements of RCW 39.10, as well as other procurement, negotiation, contracting, and contract administration matters.

Relevant Experience: Zak has practiced law in Washington since 2004. His primary practice involves representing public entities in construction and procurement matters, and he has served as outside counsel to numerous Washington state municipalities, including cities, counties, port districts, school districts and other special-purpose districts. Zak advises routinely on projects authorized under RCW 39.10, including GC/CM projects, Design-Build projects and Progressive Design-Build projects, including the following recent experience:

- Outside counsel for Mukilteo School District on multiple GC/CM projects, including the Mariner High School Renovation & Addition, Challenger & Horizon Elementary Schools.
- Outside counsel for Pierce Transit on GC/CM projects including the Maintenance & Operations Base Infrastructure & Facility Improvements Project.
- Outside counsel to Lake Washington School District on GC/CM projects, including Levy Middle School Additions project currently under development.
- Outside counsel to Lake Washington School District on upcoming Progressive Design Project.
- Outside counsel for Seattle Art Museum on Seattle Asian Art Museum Renovations Project, procured and constructed in accordance with GC/CM requirements of RCW 39.10.
- Outside counsel for the City of Everett on the Reservoir 3 Structural Upgrade Project, under development as a Progressive Design-Build project.
- Outside counsel for the City of Everett on the Water Filter Plant Phase 2 Capital Upgrades Project, which is currently under development as a Progressive Design-Build project.
- Outside counsel for Snohomish County on the Arlington Operations Center project, under development as a Progressive Design-Build project. The project involves upgrade and modification to the County’s Arlington Operations Center.
- Outside counsel for Issaquah School District in procurement and construction of new high school and middle school, under development as a Progressive Design-Build project.
- Outside counsel for Seattle Tunnel Partners JV on SR 99 Viaduct Replacement Project (Bertha). The Project, one of the largest Design-Build projects in state history, is now complete.
- 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 Example Staff/Contractor Project Experience and Role. The applicant shall use the abbreviations as identified in the example in the attachment.)*

Refer to the Bios and project experience tables above.

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

Refer to the Bios 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.

N/A. Project Management will be provided by Parametrix on behalf of and under the supervision and direction of the South Whidbey School District.

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

Refer to the Bios and project experience tables above.

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

The District's Director of Business will serve as the District's main point of contact for the project. They will receive significant support from the Parametrix team who serve as the District's APD advisory and PM/CM consultant. The organizational chart included in this application describes the relationships between the various parties and the Bios above describe the roles for each member of the project team.

Being a small, rural District, SWSD has had a number of small capital projects over the last 10 years or so. However, this program of work will be the first large capital project work on District facilities in nearly 30 years. The District and Parametrix will work together to establish project controls and a management system that will be more conducive to the needs of large capital projects.

Financial control will be exercised through a signature authority process for changes. The Parametrix PM/CM consultant team will not have signature authority for changes in the contract value. The District's Superintendent has signature authority for up to \$75,000. Anything larger than that amount would need to go to the School Board for approval and signature.

The Guaranteed Maximum Price (GMP) will include a GC/CM Risk Contingency that may be used by the team during coordination of the work and specifically during subcontract buyout and construction. Use of any of these contingency funds by the GC/CM requires approval by the District, but the District cannot unreasonably withhold use of the contingency. The District will also carry a 5% Project Contingency outside of the GMP that can be utilized for costs such as unforeseen conditions, errors/omissions in the construction documents and owner directed changes in project scope.

The District's Superintendent, Director of Business and the Parametrix Project Manager will meet regularly to discuss the project and there will be a focus on timely resolution of cost issues, review and approval of pay applications and accounts payable. The Parametrix project manager will work closely with the District's team to keep them fully informed of any potential cost issues and accounts payable. This approach of open correspondence and collaboration will keep the team continually informed on project status and will keep the District aware of any decisions, directions or payments to be made. This approach has worked well for the Parametrix team on previous General Contractor/Construction Manager (GC/CM) projects.

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

The procurement process will build upon the experience and success that Parametrix has had in GC/CM project delivery and will include the following:

- Contact/Outreach to experienced, potential GC/CM candidates prior to the release of the RFP.
- Develop the RFP and RFFP documents.
- Issue RFP to solicit qualification/proposal statements from GC/CM candidates.
- Receive and evaluate/score/rank the SOQs received.
- Check references of the highest ranked GC/CM firms and their team members.
- Notify all submitters of the shortlisted, most qualified GC/CM firms who have been invited to the interview stage.
- Interview and score/rank the shortlisted GC/CM candidates.
- Issue an RFFP to solicit final proposals (price factors) from the highest ranked GC/CM candidates.
- Receive and open/score the final proposals (price factors) received to identify the most highly qualified GC/CM.
- Request approval from the School Board to negotiate pre-construction services and contract with the most highly qualified GC/CM.
- Negotiate pre-construction services and terms and conditions of the contract with the most highly qualified GC/CM.
- Present pre-construction scope/fee and contract to the School Board and make recommendation to award a contract to the most highly qualified GC/CM.
- Execute GC/CM Agreement with Pre-Construction services.
- Issue notice to proceed.

The GC/CM RFP will be advertised in early June 2024. By mid-August 2024, the GC/CM procurement process will have been completed and a Pre-construction Services agreement will be negotiated. A GC/CM agreement for Pre-Construction services will be presented for approval to the School Board by late September 2024. This will allow the GC/CM Contractor to join the project team prior to the end of Schematic Design and participate in the Schematic Design, Cost Estimating and Value Analysis exercises.

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

The District will utilize a GC/CM Contract, Guaranteed Maximum Price Amendment and General Conditions documents prepared by Pacifica Law Group. We will also utilize the standardized GC/CM RFP, RFFP and selection documents developed by Parametrix and used successfully for numerous GC/CM projects. These documents will include a draft version of the General Conditions, GC/CM Contract, general requirements, preconstruction services scope of work, and cost allocation matrix. These documents will be amended, as required, prior to issuing the final RFFP to reflect the input of GC/CM candidates, industry best practices and any recent revisions to applicable RCWs.

7. 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 Example Construction History. The applicant shall use the abbreviations as identified in the example in the attachment.)*

- 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
- Small-, minority-, women-, and veteran-owned business participation planned and actual utilization

Refer to Exhibit 2 for a matrix summary of SWSD's construction activity over the past 6 years.

8. 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. *(See Example concepts, sketches or plans depicting the project.)* At a minimum, please try to include the following:

- An overview site plan *(indicating existing structure and new structures)*

Refer to Exhibits 3-5 for Existing and Conceptual Site Plans information.

- 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.

Refer to Exhibits 6-8 for Conceptual Floor Plans, images and proposed scope.

9. Resolution of Audit Findings on Previous Public Works Projects

If your organization had audit findings on *any* project identified in your response to Question 7, please specify the project, briefly state those findings, and describe how your organization resolved them.

The District has had no audit findings in the projects listed in Section 7 of this application.

10. Subcontractor Outreach

Please describe your subcontractor outreach and how the public body will encourage small-, minority-, women-, and veteran-owned business participation.

The GC/CM procurement documents and contract documents (Agreement and General Conditions currently being developed will include a clause similar to the following:

“The GC/CM shall actively and in good faith provide opportunities for underutilized businesses as subcontractors and suppliers to provide bids for the supply of goods and/or the subcontracting of services for work in the construction of this project. GC/CM shall implement an Outreach Plan, reviewed and approved by the Owner, prior to the execution of the GC/CM Agreement, that outlines the proactive strategies, resource commitments and specific steps that the GC/CM will take to effectively reach out to underutilized businesses, provide bid packages conducive to underutilized businesses and encourage underutilized businesses to provide bids for this project. As used in this section, the term “underutilized businesses” shall include Veteran Business Enterprises (VBE), Minority Business Enterprises (MBE), Women Business Enterprises (WBE), Minority Business Enterprises (MWBE), Combination Business Enterprises (CBE) and Socially and Economically Disadvantaged Business Enterprises (SEDBE). The term VBE means a business at least 51% of which is veteran-owned. The terms MBE, WBE, MWBE, CBE and SEDBE are any such business that has been so certified by the State of Washington.”

11. Alternative Subcontractor Selection

- If your organization anticipates using this method of subcontractor selection and the scope of work is anticipated to be over \$3M, please provide a completed *Supplement A, Alternative Subcontractor Selection Application* document, one per each desired subcontractor/subcontract package.

N/A

- If applicability of this method will be determined after the project has been approved for GC/CM alternative contracting or your project is anticipated to be under \$3M, respond with N/A to this question.
- If your organization in conjunction with the GC/CM decide to use the alternative subcontractor method in the future and your project is anticipated to be over \$3M, you will then complete the *Supplement B Alternative Subcontractor Selection Application* and submit it to the PRC for consideration at a future meeting.

CAUTION TO APPLICANTS

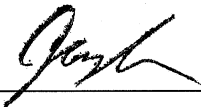
The definition of the project is at the applicant’s discretion. The entire project, including all components, must meet the criteria to be approved.

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 information requested by the PRC. You agree to submit this information in a timely manner and understand that failure to do so may delay action on your application.

If the PRC approves your request to use the GC/CM contracting procedure, you also agree to provide additional information if requested. For each GC/CM project, documentation supporting compliance with the limitations on the GC/CM self-performed work will be required. This information may include but is not limited to: a construction management and contracting plan, final subcontracting plan and/or a final TCC/MACC summary with subcontract awards, or similar.

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

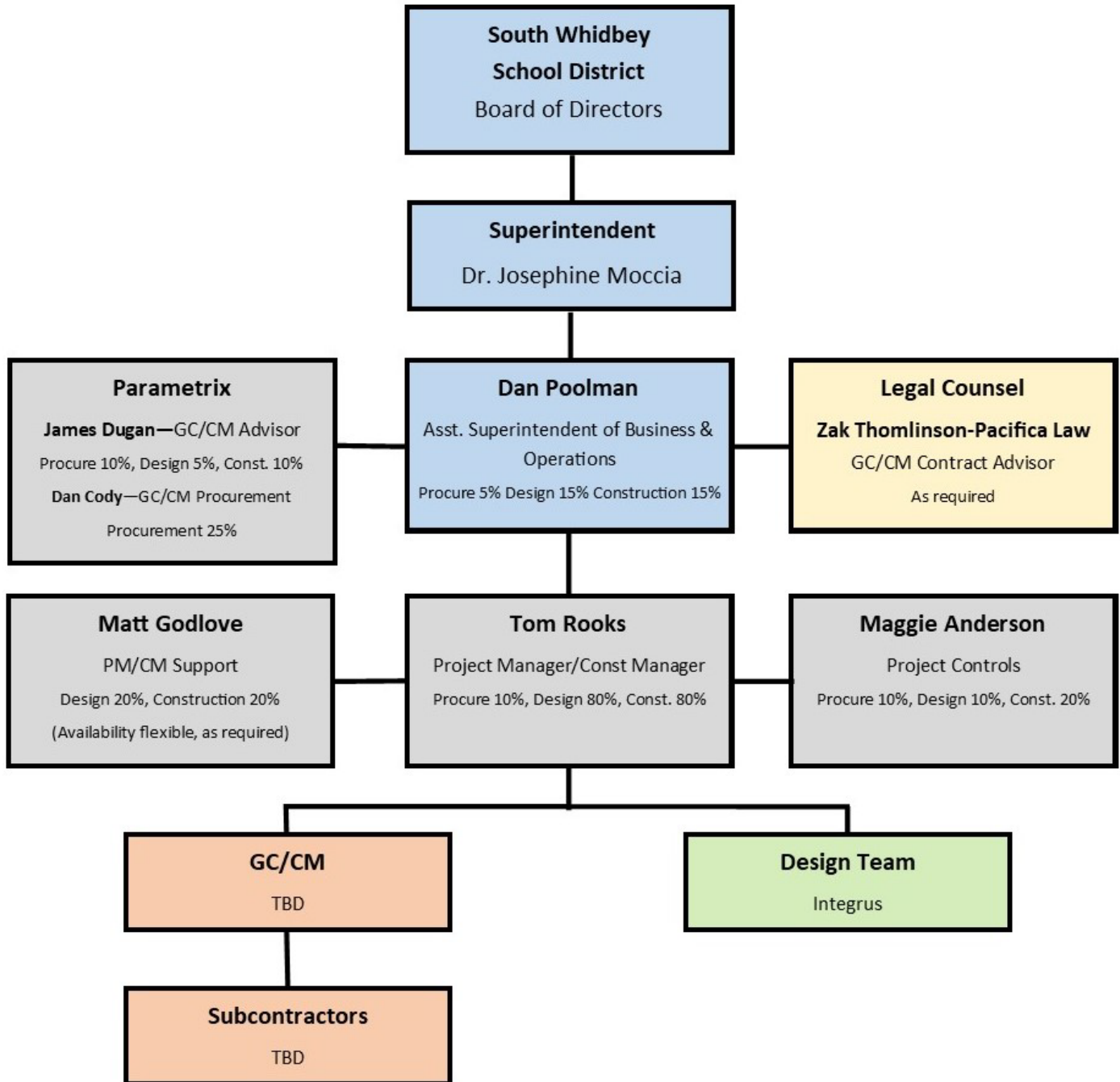
Signature: 

Name (please print): Dr. Josephine Moccia (public body personnel)

Title: Superintendent, South Whidbey School District no. 206

Date: 4/19/24

Exhibit 1 – Project Organizational Chart



**South Whidbey School District - Facility Modernization
and Upgrades Bundle**

Project Organization Chart

Exhibit 2 – SWSD 6-year Construction History

South Whidbey School District no.206 - Construction History (6 years)									
<i>Project Name</i>	<i>Project Description</i>	<i>Contracting Method</i>	<i>Planned Start</i>	<i>Planned Finish</i>	<i>Actual Start</i>	<i>Actual Finish</i>	<i>Planned Budget</i>	<i>Actual Budget</i>	<i>Reason for Budget or Schedule Overrun</i>
Elementary School Heat Pump Replacement	*Heat pump units replaced as capital levy funding was available each year. Rolling replacement project based on as needed conditions.	D/B/B	Jul-17	Aug-19	Jul-17	Aug-19	*NA	\$623K	NA
Seismic Retrofit of Langley Middle School-Community Gym	Seismic upgrades to a masonry structure. This project was significantly funded by FEMA.	D/B/B	Jun-17	Jul-20	Apr-19	Oct-23	\$946K	\$1.4M	COVID supply chain issues and inflated bids.

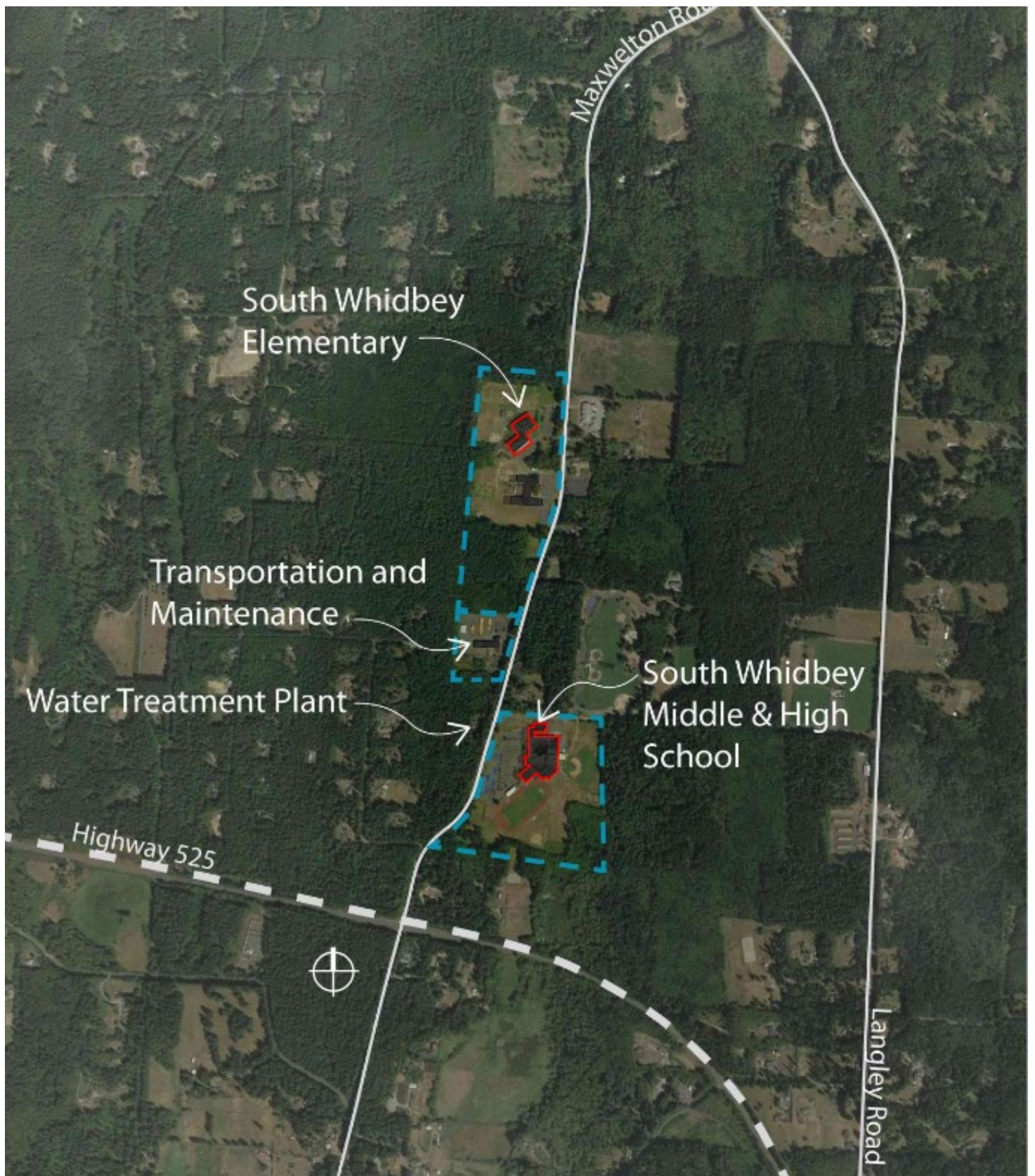


Exhibit 4 – Elementary School Existing Site Plan



SOUTH WHIDBEY ELEMENTARY SCHOOL



OVERVIEW

- Student Enrollment: 431 (K - 5)

BUILDING INFORMATION - NORTH CAMPUS (1988 - 49,577 sf)

1988 - North Campus - 49,577sf
TOTAL 49,557 sf

CURRENT PROGRAM SPACES - NORTH CAMPUS

- 17 K - 5 classrooms - 15 built / 2 portable
- 1 Art Room
- 1 Community Room
- 1 Gymnasium

SITE OVERVIEW



ZONING & LAND USE

Address	5380 Maxwellton Rd. Langley, WA 98260
Jurisdiction	Island County
Plan Overlay	N/A
Zone	Rural (R)
Allowed Use	Type III Conditional Use (Existing Use 17.03.230)
Site Area	54.16 acres
Impervious Area	18.95 acres max.
Open Space	21.66 acres min. Open Space
Building Coverage	13.54 acres max.

Exhibit 5 – High School/Middle School Existing Site Plan



SOUTH WHIDBEY HIGH SCHOOL & MIDDLE SCHOOL



SITE OVERVIEW



OVERVIEW

- Student Enrollment: 663 (6-12)

**BUILDING INFORMATION
(1982 - 146,200 sf)**

1982 - Main Building - 90,200 sf

1997 - Addition - 56,000 sf

TOTAL 146,200 sf

CURRENT PROGRAM SPACES

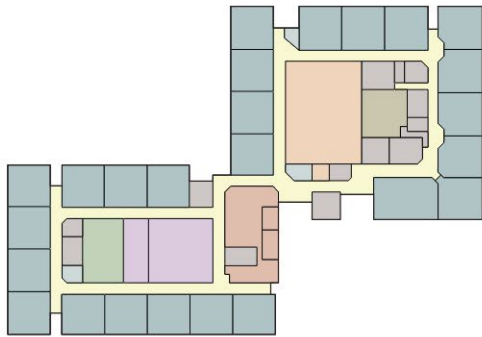
- 29 Classrooms - 22 built / 0 portables
- 1 Gymnasium & 1 Auxillary Gymnasium
- 1 Weight & Mat Room
- 1 Library
- 1 Auditorium & 1 Little Theatre
- 3 Shops
- 1 Cooking Lab
- 1 Clothing Lab
- 1 Photo Lab

ZONING & LAND USE

Address	5675 Maxwellton Rd Langley, WA 98260
Jurisdiction	Island County
Plan Overlay	N/A
Zone	Rural (R)
Allowed Use	Type III Conditional Use (Existing Use 17.03.230)
Site Area	48.40 acres
Impervious Area	16.94 acres max
	12.1 acres max/ Building Coverage
Critical Areas	Unstable Slopes - Old Slide
Notes	Maxwelton Rd is a Scenic Corridor

Exhibit 6 – Elementary School Upgrades Plan

Elementary Campus



- Security vestibule
- Inclusive playground
- Replace HVAC water source heat pump
- Modify vehicular circulation on site
- Administration renovation
- ADA upgrades to existing restrooms



Exhibit 7 – High School & Middle School Upgrades Plan

Middle School & High School Campus



- Security Vestibule
- Track & field replacement with renovations of existing grand stands
- Inclusive restrooms
- Modify vehicular circulation on site
- Roof replacement
- Existing courtyard modifications
- Provide new entry canopies
- Replace existing siding
- Replace HVAC roof top units
- Administration renovation and addition

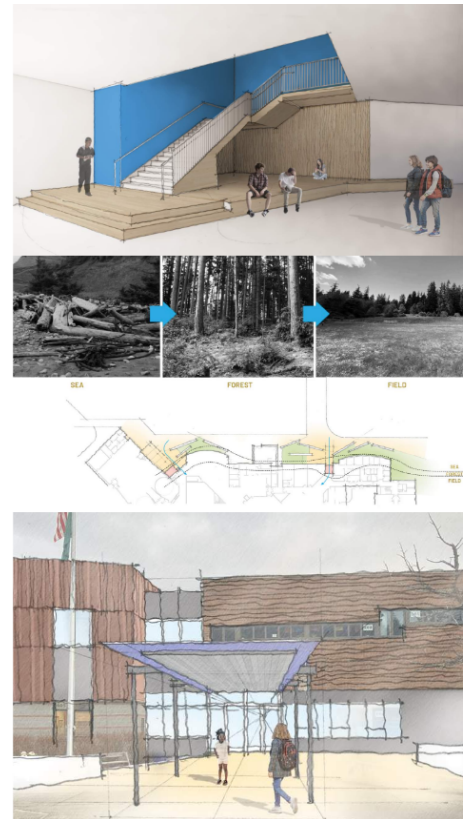
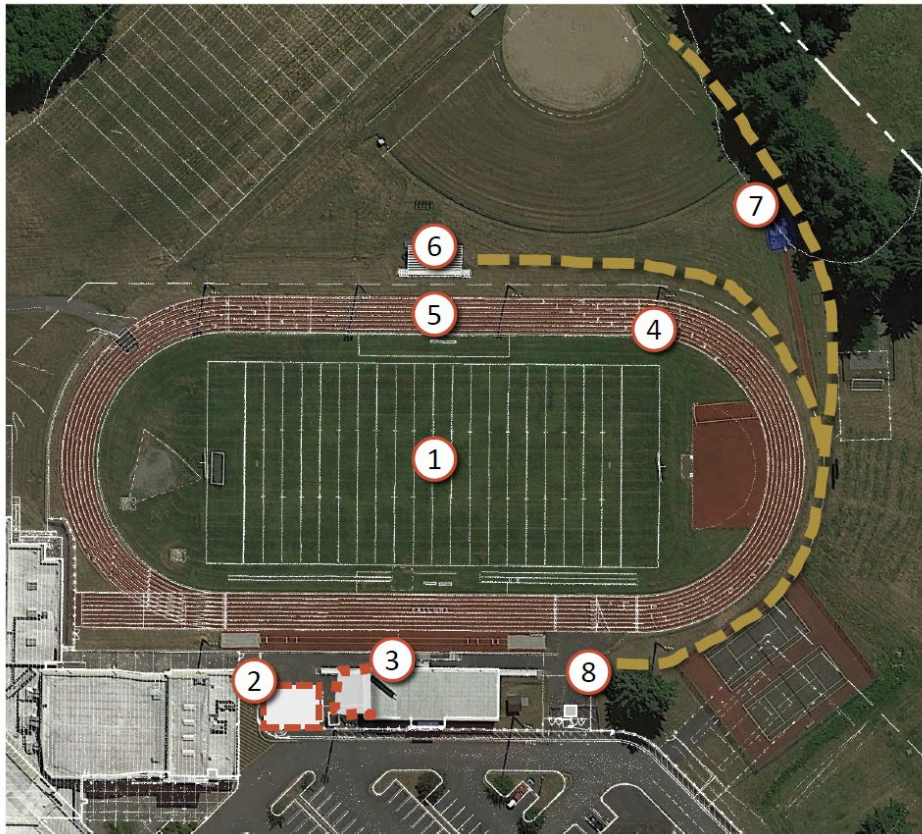


Exhibit 8 – Stadium Upgrades Plan



- ① New field surfacing
- ② Update/Replace restrooms
- ③ Grandstand expansion and press box improvements
- ④ Update field lighting and add electrical for track meets
- ⑤ Repair/replace track surface
- ⑥ Create storage under visitor seating
- ⑦ Paved pathways to softball field and visitor seating
- ⑧ General improvements:
 - Lighting upgrades
 - Pavement repair/replace
 - Ticket booth updates