



**Tahoma School District
New High School and Learning Center**

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

**Application for Project Approval
GC/CM Delivery**

**Submitted by
Tahoma School District
September 27, 2013**

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)
or DESIGN-BUILD (D-B) ALTERNATIVE 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. *(Note: A **Public Body** that is certified to use the GC/CM procedure and is seeking approval to use this procedure on a GC/CM project with a total project cost of less than \$10 million is not required to submit information for Questions 7 or 8.)*

1. Identification of Applicant

(a) Legal name of Public Body (your organization):
Tahoma School District (TSD) No. 409

(b) Address:
25720 Maple Valley-Black Diamond Road SE
Maple Valley, WA 98038

(c) Contact Person Name: Lori Cloud
Title: Director of Financial Services

(d) Phone Number: 425-413-3400
Fax: 425-432-5735
E-mail: lcloud@tahomasd.us

2. Brief Description of Proposed Project

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

The new Tahoma High School is being built to accommodate student population growth and to meet the District's needs into the future. The new high school will replace the existing aging high school, and is planned to be a high performance building. The educational program for the new facility proposes 8 core learning environments, a science suite, outside learning suites, music, community spaces (gym, commons, dining, performing arts, etc.), administrative areas, and building support spaces.

The new building will serve 2,400 students in grades 9-12, enclosing 348,000 gross square feet. Additionally, the project includes development of athletic fields and associated parking spaces in association with the City of Maple Valley. Ambitions for the athletic complex include all-weather field turf and lighting.

3. Projected Total Cost for the Project:

Note: By law, the D-B contracting procedure cannot be used unless the total cost of the project is over \$10 million. Although there is no total project cost requirement for using the GC/CM contracting procedure, every applicant must provide the information requested in Question 3.

A. Project Budget

Construction GMP, including GC/CM Contingency	\$104,300,000
Cost of professional services	13,700,000
Sales tax	9,700,000
Equipment & furnishings	8,300,000
Construction contingencies	15,400,000
Other related project costs	2,700,000
Total	\$154,100,000

B. Funding Status

Please describe the funding status for the whole project.

(If funding is not available, please explain how and when funding is anticipated)

Project funding will be secured through a capital bond issue planned for a November 2013 election. The District plans to use the pre-design work developed by the DLR Group to promote interest in the bond issue and support passage. The District currently has funding to complete design and preconstruction services without additional bond funding. Should the bond election not pass in November, current plans are to re-run the bond issue in the Spring 2014.

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.)*

Project Milestones:

Retain Architect--DLR	Summer 2013
Retain Project Manager--OAC	August, 2013
Schematic Design	August 2013 - January 2014
Submit PRC Application	September 1, 2013
PRC Presentation	September 26, 2013
Issue GC/CM RFQ	September 27, 2013
Short-list and Interview GC/CM's	October 11, 2013
Open Fee Proposals	October 16, 2013
Bond Vote	November 5, 2013
Design Development	January 2014 – June 2014
Field Development	March 2014 – July 2014

Construction Documents

June 2014 – May 2015

Permitting

February 2015 – June 2015

Building Construction

August 2015 – August 2017

Occupancy

September 2017

- If your project is already beyond completion of 30% drawings or schematic design, please list compelling reasons for using the GC/CM or D-B contracting procedure.

Not Applicable.

5. Why the GC/CM or D-B 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:

For GC/CM projects:

- 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? . *(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?

The Tahoma High School meets three of the five GC/CM criteria listed above.

Complex coordination is involved

The project site has Bonneville Power Administration transmission lines that run through the middle of the site; which will require complex coordination with BPA, the Owner and the GC/CM to ensure that the easement and the design are aligned. There are also wetlands located at the Northeast and Southwest regions of the site. Wetland mitigation may be required which includes complex coordination with the AHJ, DOE and the School District/GC/CM.

Project contains a complex and technical work environment

The project includes an advanced Career and Technical Education program that will include state of the art technical equipment for Autoshop, Robotics, Science Labs, Video Production Labs, Foods Labs, etc. Having a GC/CM involved during preconstruction will help to ensure that the often custom and complex equipment is well coordinated to meet AHJ requirements, proper estimating is performed, and proper subcontractor solicitation occurs.

GC/CM involvement is critical during the design phase

The GC/CM is critical to the design for the following reasons:

1. The size and nature of the project will require additional input to affectively manage risks and costs. The GC/CM will become a critical project partner in material selection, design details, value engineering, constructability reviews as well as construction phasing, FF&E coordination and occupancy.
2. The proposed site has a number of coordination issues with the BPA line, wetlands, logging and tree protection.
3. The GC/CM will be able to perform site investigation during preconstruction to minimize the potential of unforeseen conditions with regards to underground utilities, soils conditions, etc.
4. The GC/CM will be able to identify long-lead materials and bid those items early so that the schedule is not impacted.
5. The high performance and sustainability goals, along with vocational-technical elements of the project will make accurate cost estimating extremely important and challenging in order to meet budget and schedule constraints. Engaging a GC/CM will improve cost estimating accuracy and identification of items that will require early buyout.

6. Public Benefit

In addition to the above information, please provide information on how use of the GC/CM or D-B 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.

GC/CM will benefit the public by increasing predictability and reducing financial risks

The GC/CM is closer to actual costs for subcontractors, increasing the confidence level of preconstruction estimates. With the GC/CM delivery method, TSD will be able to have a higher degree of predictability in estimating anticipated construction costs during the design effort.

Attracting a highly qualified contractor pool to a project of this scale is more likely with GC/CM

A project of this scale is biddable by only a few of the region's general contractors, many of whom would be unlikely to bid the project in a design-bid-build delivery model. These same contractors and high-quality MEP subcontractors have already expressed interest if the project is delivered using the GC/CM method.

OAC's recent experience on similar GC/CM solicitations attracted the region's best general contractors with excellent results in preconstruction and construction phase services.

Having a GC/CM on board prior to the bond vote in November 2013 will increase the credibility of estimates and schedules

Passage of the bond issue in November 2013 is critical to project delivery. Presentation materials for the School Board and voters will include design documents, budgets, and schedules prepared by the DLR Group as well as the GC/CM. TSD believes the involvement of the GC/CM team in the final development of budgets and schedules will increase the credibility and support overall bond measure passage.

7. Public Body Qualifications

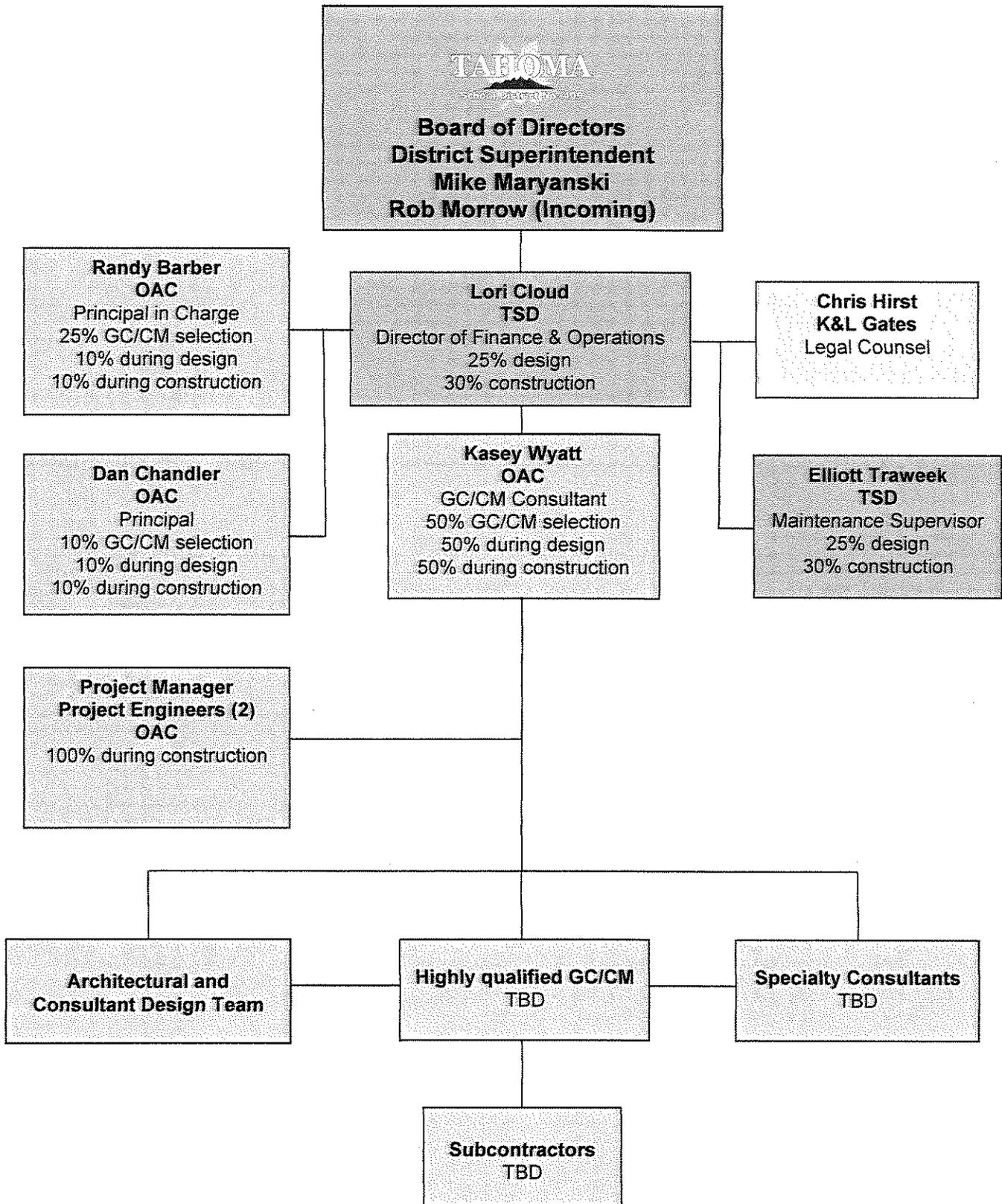
Please provide:

- A description of your organization's qualifications to use the GC/CM or D-B 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 or D-B projects** for each staff member or consultant in key positions on the proposed project. (See Attachment D for an example.)
- The qualifications of existing or planned for project manager and consultants. *Note: For design-build projects, you must have personnel who are independent of the design-build team, knowledgeable in the design-build process, and able to oversee and administer the contract.*
- The qualifications of an interim project manager until your organization has employed staff or hired a consultant as the project manager. Also indicate whether sufficient funds are available for this purpose and how long it is anticipated the interim project manager will serve. *Note: This information is required only if your organization has yet to select a project manager at the time of application.*
- 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 or D-B procurement process.
- Verification that your organization has already developed (or provide your plan to develop) specific GC/CM or D-B contract terms.

Tahoma School District has retained a highly qualified project management firm with extensive GC/CM expertise. See Attachment A for additional detail.

The Tahoma School District has retained OAC Services to manage the overall program including GC/CM process. OAC is an industry leader in alternative delivery contracting in the state of Washington. OAC is currently involved in 11 projects being delivered using alternative delivery methods.

Project Organization Chart—Tahoma High School and Regional Learning Center



The Project Team

Lori Cloud

Director of Finance & Operations, Tahoma School District

Lori has been Director of Finance and Operations for the Tahoma School District since August 2002. 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 finance and operational functions for the District, as well as capital projects. She was responsible for the renovation of the Historic Tahoma Middle School, as well as the construction of a new Transportation Center.

Elliott Traweek

Maintenance Supervisor, Tahoma School District

Elliott joined the District in Spring of 2012 as the Maintenance Supervisor. Previously he was an mechanical HVAC technician for McKinstry for 12 years. He brings 20 years of HVAC experience to the District and is a Licensed Journeyman. In the short time Elliott has been with the District he has made great improvements and efficiencies in mechanical systems throughout the District

Christopher Hirst

Partner, KL Gates LLP

Mr. Hirst is a partner in the Seattle office of K&L Gates LLP. In connection with numerous GC/CM projects, he has provided legal assistance for several school districts (including Northshore School District) and a water utility, including preparation of contract documents and other assistance with compliance with the requirements of RCW Chapter 39.10. Mr. Hirst has been a member of the Capital Projects Advisory Review Board since January 2008.

Kasey Wyatt

OAC Project Manager

Ms. Wyatt has over 18 years of school construction and project management experience, including 4 GC/CM projects.

Ms. Wyatt will oversee and manage the design and construction phases of the project. She will also be TSD's lead in the oversight of bid, contract and project management documents and procedures prepared by the GC/CM. Currently leading six GC/CM projects valued at approximately \$150 million, Ms. Wyatt is a highly skilled GC/CM practitioner. She builds highly collaborative designer-contractor-owner teams focused on the owner's needs throughout.

Randy Barber, PE

OAC Principal in Charge

Mr. Barber has over 30 years construction experience including extensive education and public works projects. Currently supporting the Olympia School District as a GC/CM consulting on two ongoing successful projects, Mr. Barber works closely with OAC co-principal for GC/CM execution and best practices.

Mr. Barber will support the project during GC/CM selection, contract negotiations, execution, and during construction. He will coordinate value-added measures and be responsible for quality control for management services.

Dan Chandler, PE, AIA

OAC Principal

Mr. Chandler leads one of the region's premier project management consulting firms and will support the Tahoma School District and the OAC during GC/CM procurement, contracting and subcontractor procurement including possible MC/CM and EC/CM. A veteran of 22 alternative delivery projects including eight GCCM school projects, Mr. Chandler will work closely with the overall team to bring GCCM best practices to the project.

Organizational Controls

TSD has engaged OAC Services, Inc., who has extensive project controls and reporting systems to effectively manage, the scope, schedule and budget for the projects. Ms. Wyatt will work with TSD in the implementation of standard project budgeting tools and project management websites to manage communications and monitor progress. 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

TSD is planning on utilizing a modified AIA121/CMC owner agreement along with modified AIA201 general conditions developed in close coordination with legal counsel. In addition, TSD 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 an OAC standard form and modified with the latest lessons learned from other public owners. This process will include selection criteria, interviews and final selection evaluations.

The roles and responsibilities of the owner, construction management team, architect, and the GC/CM are defined and coordinated through a number of responsibilities and contractual requirements.

GC/CM Procurement

TSD is planning on using a three-phased GC/CM selection model:

Project Approval Request
Tahoma School District

1. Public outreach followed by a Request for Qualifications, and Approach
 - a. Focusing on relevant experience, proposed team and approach
 - b. Short list for interviews—three, possible four firms
2. Extensive interviews, site and office visits
 - a. Focusing on team members proposed
3. Fee and Specified General Conditions Bidding
 - a. Focusing on competitive but reasonable fees

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: *(labeled Att. '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

Please refer to Attachment C.

10. Resolution of Audit Findings on Previous Public Works Projects

No unresolved findings.

Caution to Applicants

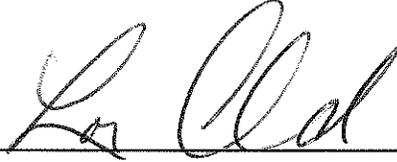
The definition of the project is at the applicant's discretion. The entire project, including all components, must meet the criteria to be approved.

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 or D-B 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 or D-B process. You also agree that your organization will complete these surveys within the time required by CPARB

Signature _____



Name (please print): Lori Cloud

Title: Director of Finance & Operations

Date: September 1, 2013

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	Construction Budget	Procurement Type	Role During Project Phases		
					Pre-Design	Design	Construction
Lori Cloud	Director of Finance & Operations Tahoma School District	Historic Tahoma Middle School Tahoma Transportation Center	\$8M \$25M	D/B/B			
Kasey Wyatt	Associate/Sr. Project Manager, OAC Services	Carter Lake Elementary School Hillside Elementary Schools Clarkmoor Elementary School Greenwood Elementary School	\$25M \$25M \$25M \$25M	GC/CM GC/CM GC/CM GC/CM	PM PM PM PM	PM PM PM PM	PM PM PM PM
Randy Barber, PE	Principal, OAC Services	Auburn High School Garfield Elementary School Olympia Regional Learning Academy	\$75M \$15M \$20M	D/B/B GC/CM GC/CM	PM PM PM	PM PM PM	
Dan Chandler, PE, AIA	Principal, OAC Services	Mason General Hospital Nine Mile Falls SD (2 elem) Olympia City Hall Clover Park SD (4 elem) Northside Residence Hall, WSU	\$40M \$19M \$40M \$140M \$35M	GC/CM GC/CM D/B GC/CM DB	PM PIC PM PIC PM PIC PM PIC CM Cons.	PM PIC PM PIC PM PIC PM PIC CM Cons.	PM PIC PM PIC PM PIC PM PIC CM Cons.

