



South Whidbey School District Facilities Modernization & Upgrades Bundle

APPLICATION FOR APPROVAL TO UTILIZE GC/CM
PROJECT DELIVERY

MAY 23, 2024, PRESENTATION

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Introductions



Presenting Team

South Whidbey School District

- Dr. Josephine Moccia – Superintendent
- Paul Field – Director of Finance

Integrus Architecture

- Rebecca Baibak – Architect, Principal in Charge
- Jeff Luedeman – Architect, Project Manager

Parametrix

- Jim Dugan – Principal in Charge and GC/CM Advisor
- Tom Rooks – Project Manager/Construction Manager
- Dan Cody – GC/CM Procurement Manager & Advisor

Pacifica Law Group

- Zak Tomlinson – External Legal Counsel



The District



South Whidbey School District

- Located in Langley, Washington
- SWSD serves the communities located on the south end of Whidbey Island
- Approximately 1200 students
- The District employs approximately 144 FTE and 185 staff
- The District's schools are comprised of:
 - 1 Elementary School sits on a 54-acre site built in 1988.
 - Serves grades K-5
 - 1 Combination High School/Middle School sits on a 48-acre site built in 1982.
 - Serves grades 6-12



South Whidbey School District



Our Vision:

Every South Whidbey School District Student is a lifelong learner who is multi-culturally engaged, literate, and an active community member able to meet the challenges of our global society.

Our Mission:

In collaboration with our community, every student will be supported to be a resilient, innovative, compassionate, and productive graduate prepared for a diverse and dynamic world.



The Project



South Whidbey School District Vicinity Map



South Whidbey Elementary School Site Overview



South Whidbey Middle & High School Site Overview



South Whidbey School District Facilities Modernization & Upgrades Bundle

- Both the Elementary School and the High School/Middle School Facilities have systems that 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.
- The upgrades and modernizations will focus on:
 - Systems and infrastructure
 - Accessibility and inclusiveness
 - Safety and security
 - 21st century learning
 - Identity and wayfinding
 - Sustainability and energy efficiency,
 - Ease of operation and maintenance
 - Extending the useful life of facilities



South Whidbey Elementary School Upgrades Plan



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

South Whidbey High School & Middle School Upgrades Plan



- Security Vestibule
- Track & field replacement with renovations of existing grandstands
- 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

South Whidbey Stadium Upgrades Plan



1. New field resurfacing
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

Project Budget



South Whidbey SD Facilities Modernization & Upgrades Bundle Project Budget

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



Project Funding

- This project is 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. Based on preliminary estimates, we are planning on \$4M of SCAP funding from OSPI.



Project Schedule



South Whidbey SD Facilities Modernization & Upgrades Bundle Project Schedule

GC/CM Schedule	Start	Finish
PRC Presentation		May 23, 2024
PRC Approval to Utilize GC/CM		May 23, 2024
First publication of RFP for GC/CM Services		June 3, 2024
RFP Submittal (SOQ) Deadline		June 28, 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		August 2, 2024
Notify Submitters of Scoring and Most Qualified GC/CM		August 5, 2024
Negotiate Terms and Conditions of Agreement and Pre-Con Work Plan	August 12, 2024	August 23, 2024



South Whidbey SD Facilities Modernization & Upgrades Bundle Project Schedule

GC/CM Schedule	Start	Finish
GC/CM Notice to Proceed		September 16, 2024
Early Procurement & Early Bid Packages (Mini-MACCs)	TBD	TBD
GMP Negotiation (90% CDs)	June 2025	June 2025
Phased Construction at MS/HS Campus	Oct 2025	July 2027
Phased Construction at Elementary School	June 2026	July 2028



Diversity, Equity and Inclusion

The South Whidbey School District has/is:

- Adopted a non-discrimination clause and has demonstrated commitment to supporting all community members.
- Committed to being an anti-racist organization and tolerates no discrimination based on gender, gender expression, race, creed, religion, color, or nationality.
- Trained administrators and staff for over 30 hours on equity led by Dr. Caprice Hollins, completed weekly training in developing a Culture of care using restorative practices, and continues training on promoting responsible and ethical use of technology.
- Continues to focus on building capacity for leading equity-related conversations



Why GC/CM Delivery Method for the South Whidbey SD Facilities Modernization and Upgrades Bundle Project



RCW 39.10.300 GC/CM Statutory Compliance

Complies with 3 of the 5 Statutory Criteria

- (1) Implementation of the project involves complex scheduling, phasing, or coordination.
- (2) The project involves construction at an occupied facility which must continue to operate during construction
- (3) The involvement of the General Contractor/Construction Manager during the design stage is critical to the success of the project.
- (4) The project encompasses a complex or technical work environment.
- (5) The project requires specialized work on a building that has historic significance.



Advantages to GC/CM Delivery

- Improved cost control – “open book” cost accounting of the work
- Allocation of risk – GC/CM understands the nature and scope of construction long before it bids, reducing the “learning curve”, and lowers the potential for surprises that add cost/time during construction.
- Schedule compliance – GC/CM is motivated to maintain a schedule they developed.
- Fiscal accountability through GC/CM participation in constructability reviews, value analysis and design-team/contractor/Owner coordination
- Bidding coordination – GC/CM will plan, coordinate and execute subcontractor bid packages for best responsiveness and lower risk of gaps and duplication in subcontractor bidding and buy-out.



Public Body Qualifications

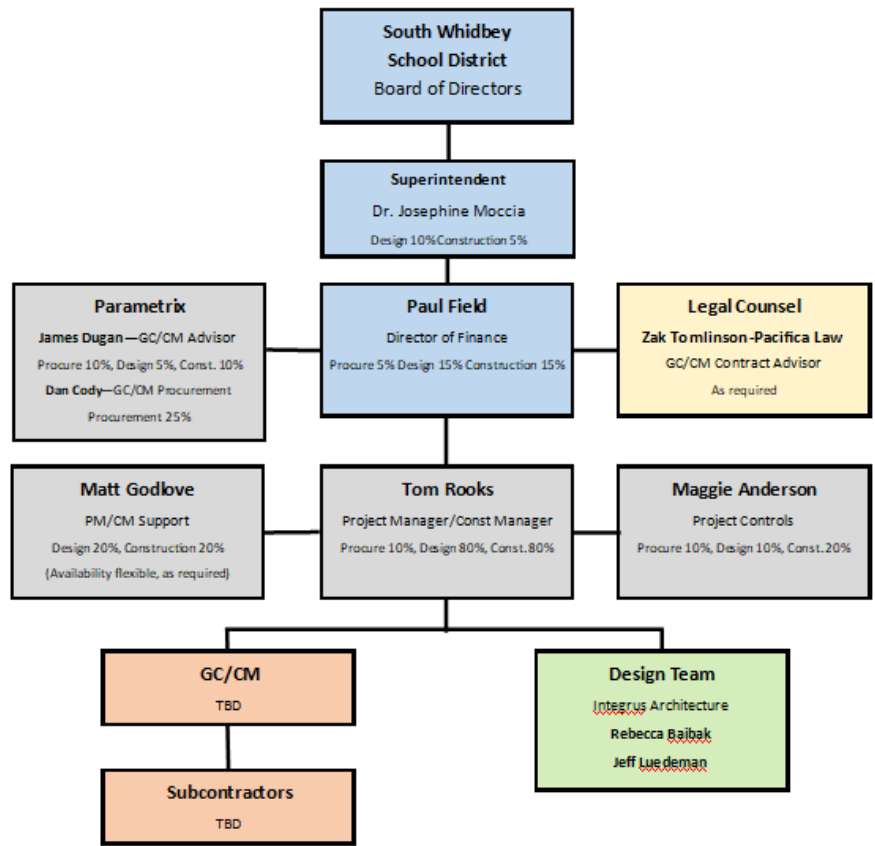


Leadership Team

- South Whidbey School District has augmented the project team with consultants that have extensive background in GC/CM project delivery.
 - Integrus will lead the design team. They bring an extensive background in the design of K-12 facilities and GC/CM project delivery.
 - SWSD has contracted with Parametrix to provide GC/CM advisory, GC/CM procurement and PM/CM consultant services throughout the life of the project. As a team member, Parametrix brings:
 - Extensive GC/CM experience
 - Knowledge of statutory requirements
 - Industry best practices and lessons learned related to - GC/CM delivery
 - SWSD enlisted the services of Pacifica Law Group to develop the contract documents and advise on legal issues and best practices related to RCW 39.10 and GC/CM delivery.

SWSD satisfies the public body qualifications by staff augmentation with consultants.





**South Whidbey School District - Facility Modernization
 and Upgrades Bundle
 Project Organization Chart**



Project Team APD Experience



Name	Experience
<p>Dr. Josephine Moccia Superintendent South Whidbey School District</p>	<p>13 yrs. Superintendent for South Whidbey School District With institutional knowledge of the District, Dr. Moccia will take the opportunity to provide steady participation and leadership in this capital project process. She will help lead various District 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. Previous Project Experience: 5 Previous D/B/B Projects for SWSD Seismic Retrofits, Elementary School Mechanical Improvements, Elementary School Kitchen TI, Access Controls & Security Upgrade, SWSD Water Treatment Facility.</p>
<p>Paul Field Director of Finance South Whidbey School District</p>	<p>17 yrs. Accounting, Fiscal Support and Oversight Services Paul worked in the Capital Projects Department of the Northshore School District for five years. He started as the Budget Coordinator and advanced to the role of Assistant Fiscal Director of Support Services. He was responsible for accounting for the \$275 million 2018 capital bond and the \$62 million capital technology levy. At South Whidbey SD, Paul's role will be very similar to the role he had at Northshore with addition of active participation in the review of design, schedule and cost of projects. Previous GC/CM Project Experience: 3 Previous GC/CM Projects: Northshore SD: Ruby Bridges Elementary School, Skyview/Canyon Creek expansion and the Northshore Concert Hall. Paul participated in the GC/CM selection process for the Northshore Concert Hall project.</p>
<p>Rebecca Baibak, Architect Principal in Charge Integrus</p>	<p>30 yrs. As a leading Pacific Northwest education facility planner and designer. 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 School. 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. Previous Project Experience: 8 Previous GC/CM Projects Einstein Middle School, Juanita High School, Leota Middle School, Park Place Middle School, Lake Grove Elementary School, Mariner High School Modernization, Mirror Lake Elementary School, Wildwood Elementary School.</p>



Name	Experience
<p>Jeff Luedeman, Architect Project Manager Integrus</p>	<p>14 yrs. Design and Construction Experience As Project Manager for Integrus, Jeff is responsible for leading the entire design team through all phases of design, permitting and construction. Jeff has spent a majority of his career working in alternative delivery method projects. Almost all of his work in the K-12 realm represents complex, phased construction projects.</p> <p>Previous Project Experience: 5 Previous GC/CM Projects Einstein Middle School, Juanita High School, Leota Middle School, Park Place Middle School, Hazen High School.</p>
<p>Jim Dugan Principal in Charge, GC/CM Advisor Parametrix</p>	<p>45 yrs. Program/Project Management</p> <ul style="list-style-type: none"> • 20 years DB experience @ The Austin Company (1978-1998) • 27 PDB projects since 2017 • 36+ GC/CM projects <p>Previous Project Experience: City of Everett Municipal Building Renovations, Lakehaven Water and Sewer District; Headquarters and Redondo Sewer Treatment Plant, Vancouver Public Schools; Columbia River High School Mod/Add, Downtown Elementary School, Auburn School District; Three Elementary School Replacement and Four Elementary School Replacement Program, Chelan County PUD; New Headquarters, RI & RR Dam Support Facilities, Tacoma Public Schools; Grant Elementary School, Birney Elementary School, Mann Middle School Replacement.</p> <p>Project Review Committee Member: 2017 to Present. Currently representing Construction Managers. Term expires June 2026.</p>



Name	Experience
<p>Tom Rooks, Architect Project Manager/Construction Manager Parametrix</p>	<p>30 yrs. Design and Construction Experience Tom brings experience to the design and construction industry as an architect, project manager, and construction manager. Tom’s primary role will be to provide PM/CM for capital projects during design and construction. He will collaborate with the District staff, A/E consultants and contractors and will also provide coordination with key stakeholders, including District management, associated facilities staff and individual school staff.</p> <p>Previous Project Experience: 3 Previous GC/CM Projects: Mount Vernon School District; LaVenture Middle School (PDB), Madison Elementary School (GC/CM) Mount Vernon Old Main High School (GC/CM), Mount Vernon Fine Arts – High School Modernizations (GC/CM).</p>
<p>Dan Cody, DBIA Associate GC/CM Procurement Manager & Advisor Parametrix</p>	<p>36 yrs. Design and Construction Experience</p> <ul style="list-style-type: none"> • 27 PDB projects since 2017 • 34 GC/CM projects since 2017 <p>As the GC/CM Procurement Manager, Dan will be responsible for GC/CM procurement including the development of the RFP and RFFP documents, interview criteria, and scoring criteria. During design and construction , he will provide support, mentoring and GC/CM advise to the District and other team members.</p> <p>Previous Project Experience: City of Everett Municipal Building Renovations, Lakehaven Water and Sewer District; Headquarters and Redondo Sewer Treatment Plant, Vancouver Public Schools; Columbia River High School Mod/Add, Downtown Elementary School, Auburn School District; Three Elementary School Replacement and Four Elementary School Replacement Program, Chelan County PUD; RI & RR Dam Support Facilities, Tacoma Public Schools; Grant Elementary School, Birney Elementary School, Mann Middle School Replacement.</p>



Name	Experience
<p>Zak Tomlinson External Legal Counsel Pacifica Law Group</p>	<p>20 yrs. Practicing Law in the State of Washington Zak’s 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.</p> <p>Outside Counsel Experience: Multiple Previous GC/CM Projects: Mukilteo School District on multiple GC/CM projects, Pierce Transit on GC/CM projects, Lake Washington School District on GC/CM projects, Lake Washington School District on upcoming Progressive Design project, Seattle Asian Art Museum Renovations Project, City of Everett on the Reservoir 3 and Water Filter Plant projects, Snohomish County on the Arlington Operations Center project, Issaquah School District on PDB new high school and middle school projects, Seattle Tunnel Partners JV on SR 99 Viaduct Replacement Project (Bertha), one of the largest Design-Build projects in state history is now complete.</p>



Summary

- Requesting PRC approval to utilize GC/CM project delivery.
- Project meets qualifying RCW 39.10 criteria for GC/CM delivery.
- With augmentation of GC/CM consultants, the South Whidbey School District team has:
 - GC/CM delivery knowledge and experience
 - Adequate PM/CM personnel with design and construction experience
 - Project Management Plan is developed and has clear lines of authority
 - 100% funded and appropriate time to execute the project
 - PM/CM team with experience in project type/scope
 - Necessary and appropriate construction budget
- Project team is knowledgeable and experienced in administration and management of GC/CM projects/contracts.
- South Whidbey School District has no unresolved audit findings.
- Project team is prepared and ready to proceed.



Thank You

