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): Sumner Bonney Lake School District

b) Mailing Address: **1202 Wood Avenue, Sumner, WA 98390**

c) Contact Person Name: **Marina Tanay** Title: **Director of Capital Projects**

d) Phone Number: **253-891-6305** E-mail: **marina_tanay@sumnersd.org**

1. Brief Description of Proposed Project

a) Name of Project: **Sumner High School Phase 2**

b) County of Project Location: **Pierce**

c) Please describe the project in no more than two short paragraphs. *(See Example on Project Description)*

This project consists of constructing a new, approximately 103,000 sq. ft., three-story building directly adjacent to and connecting with the existing Sumner High School. The new facility will house approximately 50 classrooms and a range of specialized program spaces, including animal science labs with an adjacent greenhouse, aerospace manufacturing, CAD and digital design classrooms, robotics, early learning and infant childcare facilities, and culinary arts kitchen. This addition will significantly expand academic, career, and technical education opportunities, while improving campus functionality and supporting projected enrollment growth.

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, Legal etc.)	**$11.00M**
Estimated project construction costs (including construction contingencies):	**$72.0M**
Equipment and furnishing costs	**$6.00M**
Off-site costs	**$1.00M**
Contract administration costs (owner, cm etc.)	**$5.50M**
Contingencies (design & owner)	**$8.50M**
Other related project costs	**$0.00M**
Alternative Subcontractor Selection costs	**$0.00M**
Sales Tax	**$9.00M**
Total	**$113.0M**

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*

$732 million Capital Bond passed in November 2024.

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

See Section C below

c) Employing staff or hiring consultants to manage the project if not already employed or hired.

(See Example on Design & Construction Schedule)

The district has hired Matt Guilanians of Falcon & Fern Project Management to serve as the Program Manager, where he and his firm will provide the day-to-day project management support as needed. Being that this is the first GC/CM undertaken by the Sumner Bonney Lake School District, they have hired OAC Services to serve as the GC/CM advisor throughout the project. OAC will be involved in the selection of the GC/CM, guide them through GMP negotiations, and provide ongoing support through project closeout as

d) Provide an updated schedule to include Alternative Subcontractor Selection Procurement process. *(If applicable)*

DESCRIPTION	STATUS/DURATION
Procure Management Consultant and GC/CM Advisor	Complete
Procure GC/CM Legal Services	Complete
Design Team Selection	Complete
GC/CM PROCUREMENT	
PRC Application Submitted	8/20/25
PRC Presentation	9/25/25
GC/CM RFQ Advertisement #1	9/29/25
GC/CM RFQ Advertisement #2	10/06/25
Pre-Submittal Meeting	10/09/25
GC/CM SOQ's Due	10/20/25
SBLSD Selection Committee SOQ Review and Scoring	10/21/25 – 10/24/25
Notify Shortlisted Finalist Teams & Issue RFP to begin pricing	10/24/25
GC/CM Interactive Meetings	11/04/25
SBLSD Open Proposals	11/07/25
SBLSD Board Approval of GC/CM Selection	11/18/25
Begin Pre-Construction	December 2025
Substantial Completion	9/28

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 Sumner High School Phase 2 project presents significant scheduling, phasing, and coordination challenges that demand careful planning and early contractor involvement.

  This 103,000 sq. ft., three-story addition will be built just feet away from and directly connected to the existing, fully operational high school, requiring precise phasing strategies to minimize disruption to teaching and learning while maintaining the highest standards of safety for students, staff, and visitors. While such issues could be addressed in a traditional design-bid-build (DBB) process, the GC/CM method is far better suited to manage these complexities. Early GC/CM engagement will enable the development of a deliberate, well-sequenced construction plan aligned with the school's operational needs, ensuring minimal impacts to the educational program.

  Key complexities include:

  - Life/safety, environmental, and utility priorities: Early identification and coordination are essential to protect the school community, particularly as construction ties into existing utilities and building systems.
  - Extremely limited site access and laydown areas: The tight campus footprint will require detailed logistics planning, constant coordination with school operations, and potential adjustments to traffic and pedestrian circulation.

- Direct adjacency to the existing academic building: This proximity increases the need for robust safety protocols, noise and dust mitigation, and active monitoring to avoid disruptions to ongoing instruction and activities.
- Integration of specialized program spaces: The project includes advanced CTE facilities—animal science labs with a greenhouse, aerospace manufacturing, CAD/digital classrooms, early learning and childcare, and a culinary arts kitchen—which demand careful sequencing, specialized systems coordination, and early trade partner input.

Early and continuous GC/CM involvement during design will be critical in proactively identifying risks, exploring mitigation strategies, sequencing complex tie-ins, and implementing safety and logistics measures that allow the school to operate effectively throughout construction.

- 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 Sumner High School Phase 2 project will be constructed on a fully operational high school campus, requiring the school to continue functioning without interruption throughout construction.

Sumner High School's academic spaces, specialized CTE labs, educational support areas, parking, campus access points, and athletic facilities will all remain in use during the project. With very limited swing space available, early GC/CM collaboration will be essential to develop a highly detailed phasing plan and traffic control strategy that keeps the campus safe, functional, and accessible.

Operational impacts that must be addressed include:

- Traffic and pedestrian circulation: Construction activity will require reconfigured pathways, crosswalks, and vehicular access points to maintain safe movement around the site.
- Building access and wayfinding: Entrances to both the new addition and existing facility, as well as internal circulation patterns, will need to be clearly identified, well-communicated, and adjusted as work progresses.
- Parking availability: On-site parking will be reduced or relocated during portions of the project, requiring coordination with staff, students, and visitors to avoid disruption.
- Athletic and extracurricular activities: Access and scheduling for fields, gyms, and other facilities will require careful planning to minimize disruption to events and student participation.

For many students, this will be their final and most pivotal year at Sumner High School. It is essential that construction activities do not unduly compromise their educational experience or the school's operational mission. The GC/CM delivery method will be key to sequencing work, mitigating disruptions, and ensuring safety while maintaining a high-quality learning environment.

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

Early and continuous GC/CM involvement during design is critical to the success of the Sumner High School Phase 2 project.

A GC/CM-developed phasing plan will be essential for reducing construction costs, minimizing disruption to teaching and learning, and proactively identifying, mitigating, and monitoring safety risks for students, staff, and the broader community. The new 103,000 sq. ft., three-story addition, constructed just feet from and directly connected to the existing high school, requires meticulous planning to safely integrate with ongoing school operations while meeting the technical requirements of numerous specialized learning environments.

Given the size, scope, and complexity of this project, coupled with continued cost escalation and market volatility, GC/CM participation throughout design will allow for accurate, detailed, and iterative cost information as the design progresses. This enables informed decision-making on products, materials, and systems that maximize return on investment and consider total cost of ownership, particularly for specialty spaces with advanced systems integration, including:

- Animal science lab and greenhouse requiring controlled environments, specialized ventilation, and durable finishes.
- Aerospace manufacturing lab with heavy equipment, high-load floor design, and precision mechanical/electrical requirements.

- CAD and digital design classrooms with advanced technology infrastructure, high-capacity data systems, and climate-controlled conditions.
- Early learning and infant childcare facilities requiring child-specific safety design, secure access control, and specialized restrooms and support spaces.
- Culinary arts kitchen with commercial-grade food service equipment, exhaust/ventilation systems, and strict health code compliance.

The GC/CM will lead continuous value analysis and constructability reviews, ensuring these specialty spaces are designed and sequenced efficiently, coordinated with base building systems, and constructed to meet performance requirements. This process will improve cost and schedule predictability while enhancing overall construction quality.

Subcontractor engagement is another critical advantage. Recruiting and retaining highly qualified trade partners early, particularly those experienced in specialized lab, childcare, and food service construction, will help control costs, reduce schedule risk, and avoid the common DBB pitfall of low bids exceeding allocated funds.

Finally, the project's close proximity to residential neighborhoods, its integration with existing utilities, and its direct connection to an operational high school demand thoughtful planning to mitigate noise, dust, traffic circulation impacts, and other community concerns. Early GC/CM collaboration will ensure these issues are addressed while fulfilling the District's commitment to being a "good neighbor" and delivering on voter expectations.

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

  This project will be delivered in a complex and technically challenging environment.

  It involves construction of a new, 103,000 sq. ft., three-story addition directly adjacent to and connected with the existing, fully occupied Sumner High School. The work will take place while the school remains in full operation, requiring intricate phasing, strict safety protocols, and constant coordination with school staff to maintain the educational mission. Although the District has experience with large capital projects, this will be one of its first major GC/CM undertakings, making early and continuous GC/CM input essential to navigate the process and fully leverage the benefits of alternative delivery.

  This is a sizable, multi-year bond program with significant exposure to cost escalation, market volatility, and supply chain uncertainty. The GC/CM will play a critical role in providing ongoing, real-time cost modeling and escalation forecasting throughout design and construction, enabling the project team to make proactive adjustments that maintain budget and schedule certainty.

  Technical complexities specific to this project include:

  - Tight site logistics with extremely limited laydown and staging space, requiring careful coordination of deliveries, material storage, and safe pedestrian/vehicle circulation for students, staff, visitors, and neighbors.
  - Integration with existing building systems, including mechanical, electrical, data/technology, and security infrastructure, without interrupting critical services in the operational facility.
  - Specialized program spaces such as an animal science lab with greenhouse, aerospace manufacturing lab, CAD/digital design classrooms, early learning and infant childcare facilities, and a culinary arts kitchen—all of which require advanced systems coordination, specialized equipment installation, and strict compliance with technical and regulatory standards.
  - Stringent environmental and community considerations, including noise, dust, and traffic control measures to meet the District's commitment to being a "good neighbor" to surrounding residential areas.

  The combination of close adjacency to an operational high school, specialized technical program requirements, limited site availability, and multi-year scale creates a highly complex project environment. GC/CM expertise will be essential to developing practical phasing, sequencing, and mitigation strategies that ensure cost, schedule, safety, and quality goals are achieved while honoring voter expectations.

- 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?

This project is not historical.

- 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?

  Will not be using heavy civil GCCM.

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 does this contracting method provide a substantial fiscal benefit; or

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

Unlike design-bid-build, the GC/CM method brings the contractor on board early, throughout design and construction, enabling real-time cost estimating, schedule validation, and risk assessment at every stage. This early collaboration is critical for Sumner High School Phase 2, where a 103,000 sq. ft., three-story addition. The GC/CM's involvement will significantly improve cost and schedule predictability, reducing the likelihood of budget overruns, delays, and operational disruptions.

The GC/CM's established subcontractor relationships and targeted procurement strategies will broaden bid coverage and increase competition, even in today's volatile labor and material markets. This is especially important for securing trade partners with proven experience in specialized educational facilities, including animal science and greenhouse labs, aerospace manufacturing spaces, CAD/digital classrooms, early learning and childcare facilities, and commercial-grade culinary arts kitchens. The right subcontractors bring not only technical expertise but also the ability to work safely and efficiently in close proximity to students and staff.

Another fiscal advantage comes from the GC/CM's expertise in value analysis and constructability reviews during design. By identifying cost-saving opportunities, avoiding scope gaps, and optimizing building systems for both performance and maintainability before construction documents are issued, the GC/CM helps prevent costly changes later. Their input in developing clear, concise scopes of work and a safe, efficient phasing plan will be essential to maintaining instructional continuity and minimizing disruption to daily school operations.

B. **Risk allocation is identified and controlled by the party who can best manage the risk.**

As a trusted and collaborative partner, the GC/CM will work with the District to develop a joint risk management matrix that tracks unknowns and issues through resolution, positively impacting project quality, schedule, cost, and risk mitigation.

The GC/CM will play a key role in developing the overall project schedule, coordinating activities, and mitigating potential time or scope impacts. This schedule will address both immediate and pending construction activities, enabling school staff and administrators to prepare in advance and provide timely notifications to students, parents, and the community about upcoming work.

Preconstruction services will include targeted site investigations, limited destructive and non-destructive testing, and confirmation of existing utilities, services, and structural conditions, all of which will reduce uncertainty and help prevent costly surprises during construction.

To clearly define responsibilities and streamline risk management, SBLSD will utilize modified AIA agreements drafted by Perkins Coie. These agreements will align each party's roles, responsibilities, and authority, ensuring the alternative delivery process is managed effectively and risks are addressed proactively.

- 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.

  Selecting a contractor under the traditional design-bid-build method is not optimal for the Sumner High School Phase 2 project. Waiting until design is complete to bring the contractor on board would introduce significant risks, including:

- Potential cost overruns due to the lack of real-time cost estimating during design, particularly for specialized spaces such as animal science and greenhouse labs, aerospace manufacturing facilities, CAD/digital design classrooms, early learning and childcare facilities, and a commercial culinary arts kitchen.
- Schedule delays caused by unforeseen constructability issues, especially where the new 103,000 sq. ft., three-story addition ties directly into the existing, occupied high school.
- Challenges managing complex MEP, technology, and security system tie-ins without early coordination between designers and builders, risking operational disruptions during system tie-ins.
- A higher likelihood of change orders resulting from scope gaps, unforeseen site conditions, or late-stage adjustments to meet the specialized requirements of advanced program spaces.

The GC/CM delivery method mitigates these risks by involving the contractor early in the process. This allows for continuous cost and schedule validation, early resolution of constructability and sequencing issues, and coordinated planning for complex technical systems, both within the new facility and where they integrate with the existing campus. Early engagement also ensures that safety requirements, quality standards, and program-specific technical demands are addressed from the outset, resulting in a more controlled execution that aligns with the District's goals for quality, schedule, budget, and minimal disruption to the educational mission.

In the case of heavy civil GC/CM, why does the heavy civil contracting procedure serve the public interest.

We will not be utilizing the Heavy Civil GC/CM process.

B. **Public Body Qualifications**

Please provide:

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

  Before selecting the GC/CM delivery method for this project, District leadership engaged in a thorough evaluation process to ensure the right fit. While the District has historically delivered projects using the traditional Design-Bid-Build method, and has maintained a strong, 30+ year relationship with its current design team, leaders recognized the value of early builder involvement to improve cost control, scheduling, and constructability.

  To make an informed decision, the District met with leaders from Central Valley School District, Bellingham School District, and others who have successfully used GC/CM. These conversations provided valuable insights into both the technical aspects of GC/CM and the lived experience of districts that have implemented it.

  District representatives also attended multiple project delivery workshops presented by OAC to the Washington Association of School Administrators. These sessions explored a range of delivery methods, including their advantages, disadvantages, and lessons learned. This research reinforced the understanding that GC/CM offers the best opportunity for project success, particularly for a complex, occupied-site project where safety, schedule, and budget predictability are paramount.

- 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)*

  See attachment A

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

  Marina Tanay - Director of Capital Projects

  Marina is an accomplished capital projects director with over a decade of experience delivering major K-12 school construction and modernization projects for the Sumner-Bonney Lake School District. She has successfully managed and coordinated projects totaling over $195 million, including the $74.5M Sumner High School Phase 1 expansion, $29.3M Emerald Hills Elementary replacement, and $28M Tehaleh Heights Elementary. Marina's expertise spans from early planning and design coordination through FF&E and construction closeout, with a proven record of executing projects in active, occupied

school environments. Her leadership ensures projects are delivered on time, within budget, and in alignment with community and district goals.

John Boatman - Capital Projects/Facilities Manager

John maintains over 33 years of experience in school design, planning, construction and operations. John has over 60 new school builds and 300+ small capital and modernizations across Washington and California to his credit. His expertise also includes modular school construction and work with various government and private agencies, totaling over $4.2B in projects in today's cost. John holds a BA in Business and Management from the University of Redlands, an MPA from the University of Washington as well as Certificate in Construction Management.

Matt Guilanians - Program Manager

Matt is a seasoned construction program manager with over 25 years of experience delivering complex industrial, commercial, and educational projects in the U.S. and internationally. A former U.S. Army Captain, he has managed projects in the billions of dollars, including major K-12 capital programs such as the $60M Sumner High School expansion and $17M Mountain View Middle School modernization. Matt's expertise spans from early design through construction closeout, with a proven record of delivering high-profile projects on time, under budget, and with exceptional stakeholder collaboration. His leadership combines strategic planning, cost control, and a hands-on approach to ensure project success in occupied and operational environments.

Jeff Jurgensen, CCM, DBIA, PMP, CPE – Program Advisor

Jeff has over 30 years of construction experience. He has worked on over 15 major capital GC/CM projects in the state of Washington and assisted in getting the Spokane Public School District agency approval. He also has worked on six major capital design-build projects, one design-build project at Spokane International Airport as well as one K12 design-build project with the Paschal Sherman Indian School in Omak Washington. Jeff led the City of Spokane through their first design build project with the Nelson Service Center. He holds the DBIA certification from the Design Build Institute of America. He was one of the early founders of the Inland Northwest Chapter of DBIA as well as the local Project Management Institute chapter.

Phil Iverson– Project Manager

Phil has over 20 years of experience in Facilities and Program/Project Management. He possesses experience in all aspects of school district capital projects and capital programs from planning through final closeout. This includes the management of construction projects consisting of new construction on green sites, new-in-lieu projects on existing sites, multi-phased modernization projects and infrastructure projects using various traditional and Washington State alternative contract delivery methods. He has experience with K-12 GC/CM projects in the capacity as the Owner and as Owners Representative/Program/Project Manager. Phil has proven success guiding districts through the GC/CM application and presentation process, along with the GC/CM selection and the GMP negotiations. Additionally, Phil provided PM support for the Western Sate Forensic Hospital, one of the largest GC/CM projects in Washington State history.

Wade Smith, EdD., CCM, Assoc-DBIA, LEED Green Assoc. – Project Executive

Wade brings over two decades of proven experience leading K–12 capital construction projects. Throughout his career, he has successfully overseen twelve major school construction initiatives, including two comprehensive GC/CM projects exceeding $110 million, and four additional CM/GC programs. Wade holds a doctorate in education - his dissertation focused exclusively on the successful implementation of the alternative delivery model for K–12 capital construction. He is a Certified Construction Manager, an Associate DBIA-certified professional through the Design-Build Institute of America and certified LEED Green Associate.

Andrew Greene is a partner in the Seattle office of Perkins Coie, LLP

Andrew has served as project counsel and drafted RCW 39.10 compliant agreements (construction, architectural, construction management, etc.) for numerous school districts and other public owners. Recent GC/CM experience includes projects for Metro Parks of Tacoma, The Point Defiance Zoo & Aquarium, Spokane International Airport, City of Spokane, Washington State University, and numerous school districts (Highline, Vashon, Clover Park, Cheney, Olympia and Edmonds, etc.). He is recognized in The Best Lawyers in America for construction law.

- 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.)*

  See Attachment B

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

  Above in Bio's as well as Attachment B

- 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.

  The Program Management Firm of Falcon & Fern has been very integral to the district over the years and is regularly involved. OAC is currently under contract for this project as well as Bonney Lake HS and the New Middle School from PRC through closeout. OAC will also support SBLSD's future application process for Agency GC/CM approval.

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

  Above in Bio's as well as Attachment B

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

  The Sumner High School Phase 2 project will be managed through a clear and coordinated structure designed to ensure effective oversight, timely decision-making, and alignment with GC/CM best practices.

  The District's Director of Capital Projects, Marina Tanay, will serve as the project's day-to-day leader, with Capital Projects/Facilities Manager, John Boatman, providing direct support. Together, they will oversee all contractual obligations and direct the work of Falcon & Fern (Program Manager), OAC (GC/CM Advisor), Hutteball + Oremus (Architect), and the selected GC/CM Contractor. Coordination with Sumner High School Phase 2 staff, as well as the District's Maintenance, Operations, and Safety personnel, who have extensive capital project experience, will be integral throughout programming, design, construction, and occupancy.

  The OAC team will augment District and Falcon & Fern staff with specialized GC/CM expertise, including procurement, contract administration, preconstruction services, GMP negotiations, and process optimization from PRC approval through closeout. They will also support and educate the District team to ensure GC/CM procedures are fully leveraged for maximum benefit.

  Management controls include:

  - Regular coordination meetings between SBLSD, Falcon & Fern, and OAC to monitor progress, address issues, and maintain clear communication channels.
  - Principals-In-Charge meetings (Owner, Architect, GC/CM) to ensure senior leadership is informed, engaged, and empowered to make timely decisions.
  - Clearly defined roles, responsibilities, and decision-making authority to maintain accountability

and flexibility while protecting the Owner's interests.
- Board oversight for all scope or budget changes, supported by required OSPI D-Forms and coordinated with the Superintendent and project leadership.
- Delegated authority to the Superintendent and leadership team via Board policy or resolution to execute contracts, sign change orders, and avoid delays.

The district has also retained a bond oversight committee for all projects who meet quarterly and issue annual reports. The committee charge is below.

The District desires an ongoing, independent review of the major projects approved by the voters on the November 5, 2024, ballot. The BOC will meet at least quarterly and will provide an annual progress report to the community and the District Board of Directors. Reports will be published on the District website for public viewing. The BOC's scope will include:

- Reviewing the process to solicit, qualify and select general contractors, architects, consultants, and vendors for major projects;
- Reviewing financial statements, project scope, construction documents, and bid solicitations ;
- Periodically inspecting school facilities and sites to assist the BOC's project review;
- Make recommendations to the Superintendent on procedures, as may be appropriate, to assist in enhancing accountability for use of Bond dollars; and
- Assist the District in communications with the public to ensure the goals of transparency and accountability in the implementation of the Bond Projects are delivered.

Marina will retain operational control and decision-making authority, with clearly documented delegation to John and Falcon & Fern's Matt to ensure smooth GC/CM operations. This structure, paired with active collaboration among all team members, will ensure that the project is delivered on time, on budget, and in alignment with the District's quality and safety standards.

Budget/Cost Control:

SBLSD and Falcon & Fern have aligned project budgets, established a work breakdown structure (WBS), and defined budget reporting requirements that comply with the Accounting Manual for Public School Districts in the State of Washington and OSPI School Facilities reimbursement requirements. The project budget will be monitored monthly against the approved baseline.

Per the AIA A133 (Owner–GC/CM) and B103 (Owner–Designer) agreements, cost estimates will be reconciled at the schematic design, design development, and construction document phases. Falcon & Fern, with OAC's support, will lead the estimate reconciliation process and maintain a documented record of negotiations to support the GMP agreement.

OSPI School Facilities value-added measures (VAMs), including value engineering, commissioning, and constructability reviews, will be conducted at every design phase. Design decision logs will be maintained to track decisions, document budget impacts, and ensure alignment between design and funding. The SBLSD Board of Directors will approve design documents and budgets at each phase before authorizing progression to the next stage or to bidding.

Early site work or subcontractor bid packages will be developed during design development using target value design budgets, updated as the design advances. Early and frequent engagement with authorities having jurisdiction (AHJs) will follow predevelopment meetings to proactively identify and resolve potential design, schedule, or cost issues prior to permit issuance.

During construction, OAC will assist SBLSD, Falcon & Fern, and the GC/CM in closely reviewing post-GMP expenditures to ensure the appropriate and approved use of GC/CM and Owner contingencies.

Schedule:

SBLSD includes Division 1 scheduling specifications included in the GC/CM RFP documents. The scheduling specifications align with the AIA A133 and A201 contract documents. Monthly updates of

the project master milestone schedules during preconstruction, design, subcontractor buyout, and subsequent construction and occupancy phases are required and standard processes and procedures.

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

  The GC/CM preconstruction services will extend through execution of the Guaranteed Maximum Price (GMP) agreement, in accordance with RCW 39.10. SBLSD has assembled its GC/CM selection team and is fully committed to a transparent, competitive, and qualifications-driven procurement process. OAC will facilitate and manage the procurement from PRC approval through project completion.

  The preparation of the GC/CM RFP and selection process will follow OAC's proven methodology, refined over years of experience and incorporating the latest lessons learned from school districts and public agencies including Central Valley SD, Lake Washington SD, Spokane Public Schools, Bremerton SD, Bellingham SD, Tahoma SD, Washington State University, and the City of Spokane.

  OAC's process emphasizes open competition to engage a broad range of qualified contractors. All procurement documents will also be reviewed by Andrew Greene of Perkins Coie to ensure compliance with State RCWs, contractual requirements with the design team, and GC/CM best practices.

  SBLSD will use a three-step GC/CM selection model:

  1. Public Outreach & Request for Qualifications (RFQ)
     a. Focus on relevant GC/CM experience, proposed project team, and approach.
     b. Shortlist three to four firms for the interactive interview phase.
  2. Interactive Meetings
     a. Engage shortlisted firms in in-depth discussions to evaluate their team composition, proposed approach, GC/CM project controls methods, and MWBE/local outreach plans.
  3. Fee & Specified General Conditions Proposal
     a. Final selection will balance qualifications and value, with the emphasis on qualifications to ensure the best overall fit for the District.
     b. This approach minimizes the impact of fee-based competition and prioritizes long-term project value.

  This structured process ensures SBLSD selects a GC/CM partner with the expertise, collaboration skills, and proven performance necessary to meet the project's quality, safety, budget, and schedule objectives.

- 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 has already engaged with Andrew Greene of Perkins Coie, who has represented the district in construction related items for years

C. **Owner Readiness** *(To be answered by the Owner)*

a) What have you done as an Owner to prepare yourself and your staff for this GC/CM project?
   i. How have you communicated with other public owners to understand the organizational alignment and administrative time needed to manage an alternative delivery project?
   ii. We have taken the time to talk with multiple project owners, two of whom have received GC/CM agency status. We spoke with Bellingham Public Schools, Quincy School District, Central Valley School District as well as Mead School District. We inquired as to the lessons learned and pros and cons of the process. SBLSD also recently hired John Boatman, who is an experienced GC/CM manager, who has provided us first-hand experience while he was at Clover Park School District.

iii. What training have you as an Owner and your staff taken?

We have not completed the AGC training yet but have arranged in-house training utilizing an AGC Certified Trainer to receive the class privately for the district, as the next AGC class is not until December.

iv. How have you considered the differences in alternative delivery vs Design Bid Build with regards to contract requirements around risk allocation, attitudes towards contract changes, disputes, etc.?

We have completed a project delivery workshop as well as having had a fact-finding meeting in a public group setting with designers and contractors to learn about the GC/CM process. This, along with speaking with several owners and performing additional fact-finding research, has provided us with a strong foundation.

b) How does your organization ensure that knowledge is passed down to your staff and project team?

Right now, OAC is leading the district through our first 3 GC/CM projects. Upon completion, we hopefully will submit for agency status. OAC will be documenting everything completed, and working hand in hand with the district team including our Program Manager Matt (Falcon and Fern) to provide us the knowledge and ability to deliver GC/CM in the future without the need of outside consultants.

c) How have you familiarized yourself and your staff with GC/CM Best Practices?

Our district project management team has read the GC/CM best practices manual, as well as the Progressive Design Build best practices, for familiarity. Not only is our capital projects team working on understanding the process, but time is also being spent with our internal teams such as Procurement, Legal and Finance, ensuring their level of competence, understanding and comfortability with the delivery model is sound.

d) What is your role in monitoring GC/CM Subcontractor Bid Packaging, and do you have staff allocated to provide oversight in Prime contractor's bidding and subcontract terms?

We, as SBLSD and its consultants, will be taking a very proactive approach in reviewing the bid packages to ensure they are developed in the best interest of SBLSD and our community. Having properly developed bid packages helps give our local contractors opportunities to bid and win work, while still ensuring competitive bidding standards are met. One of our promises made was maximizing the opportunity for local contractors and vendors to participate, and that starts with proper attention to bid packaging.

D. **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

See Attachment C

E. **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)*
- 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.*

See Attachment D

F. **Resolution of Audit Findings on Previous Public Works Projects**

If your organization had audit findings on ***any*** project identified in your response to Question 8, please specify the project, briefly state those findings, and describe how your organization resolved them.

No Audit Findings

G. **Subcontractor Outreach**

Please describe your subcontractor outreach and how the public body will encourage small-, minority-, women-, and veteran-owned business participation. Please include past performance inclusion goals (%) and actual utilization ($).

Sumner-Sumner School District is committed to ensuring that the Sumner High School Phase 2 project reflects the diversity, equity, and inclusion values of our community. Consistent with existing Board Policy (6220), we will implement intentional, proactive strategies to encourage participation from small-, minority-, women-, and veteran-owned businesses (SMWVB), in alignment with RCW 39.19 and guidance from the Washington State Office of Minority and Women's Business Enterprises (OMWBE). We recognize that the GC/CM delivery method offers unique opportunities for inclusion because it allows early trade partner involvement, flexible packaging of work scopes, and targeted outreach well before bid day.

Owner-Led Outreach Prior to Procurement

Before formal procurement begins, the District will host outreach and informational meetings to introduce the project, outline anticipated bid opportunities, and discuss the District's commitment to SMWVB participation. These sessions will be open to the public and specifically marketed through:

- The OMWBE directory and certified firm lists.
- Local and regional chambers of commerce.
- Minority and women business advocacy organizations such as Tabor 100, NAMC-WA, and regional chapters of NAWIC.
- Local plan centers, trade associations, and community-based organizations.

These events will serve as an opportunity to explain project requirements, answer questions, and connect potential subcontractors with resources to prepare them for successful participation.

GC/CM Selection Criteria and Expectations

The District will embed SMWVB inclusion as a scored element in the GC/CM procurement process. Prospective GC/CM firms will be required to:

- Describe their approach to achieving SMWVB participation.
- Provide examples of past performance and results in meeting or exceeding participation goals.
- Outline strategies for mentoring, technical assistance, and fostering long-term relationships with diverse firms.

By weighing this element in the SOQ and Management Plan scoring, the District ensures that inclusion strategies are a priority in selecting the GC/CM partner.

GC/CM Outreach, Inclusion, and Procurement Plan

Once selected, the GC/CM will develop a detailed, project-specific Outreach, Inclusion, and Procurement Plan for District approval. At a minimum, the plan will:

- Set specific participation targets for SMWVB firms.
- Identify targeted bid packages and procurement strategies to make scopes accessible to smaller firms (e.g., breaking down large scopes into smaller packages, adjusting bonding requirements where appropriate, and providing longer bid lead times).
- Schedule "Meet the GC/CM" events and trade partner networking sessions to connect certified firms with prime bidders.
- Include a mentorship and technical assistance program to help SMWVB firms meet bonding, insurance, safety, and documentation requirements.

This plan will be a living document, updated throughout design and construction, and will require District review and approval prior to implementation.

Ongoing Monitoring, Reporting, and Continuous Improvement
The GC/CM will provide monthly reports tracking SMWVB outreach efforts, bid participation, awards, and workforce diversity metrics. The District and OAC will monitor progress, identify barriers to participation, and implement corrective actions where needed. This includes holding the GC/CM accountable for following through on their commitments and providing additional outreach if participation is trending below expectations.

Long-Term Commitment and Regional Impact
The District understands that increasing SMWVB participation is a long-term endeavor. The District remains committed to not only encouraging participation in this project, but also increasing access to certification by offering information, resources, and encouragement to local small businesses who may qualify but have not yet navigated the certification process. Through this project and others in our bond program, we intend to create sustainable opportunities and relationships that extend beyond construction completion.

By integrating these measures into the GC/CM process, Sumner-Sumner School District will ensure that its capital investments reflect the diversity, skill, and entrepreneurial spirit of our broader community.

H. **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*.
- 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.

The PRC strongly encourages all project team members to read the GC/CM Best Practices Guidelines as developed by CPARB and attend any relevant applicable training. If the PRC approves your request to use the GC/CM contracting procedure, you also 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 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.

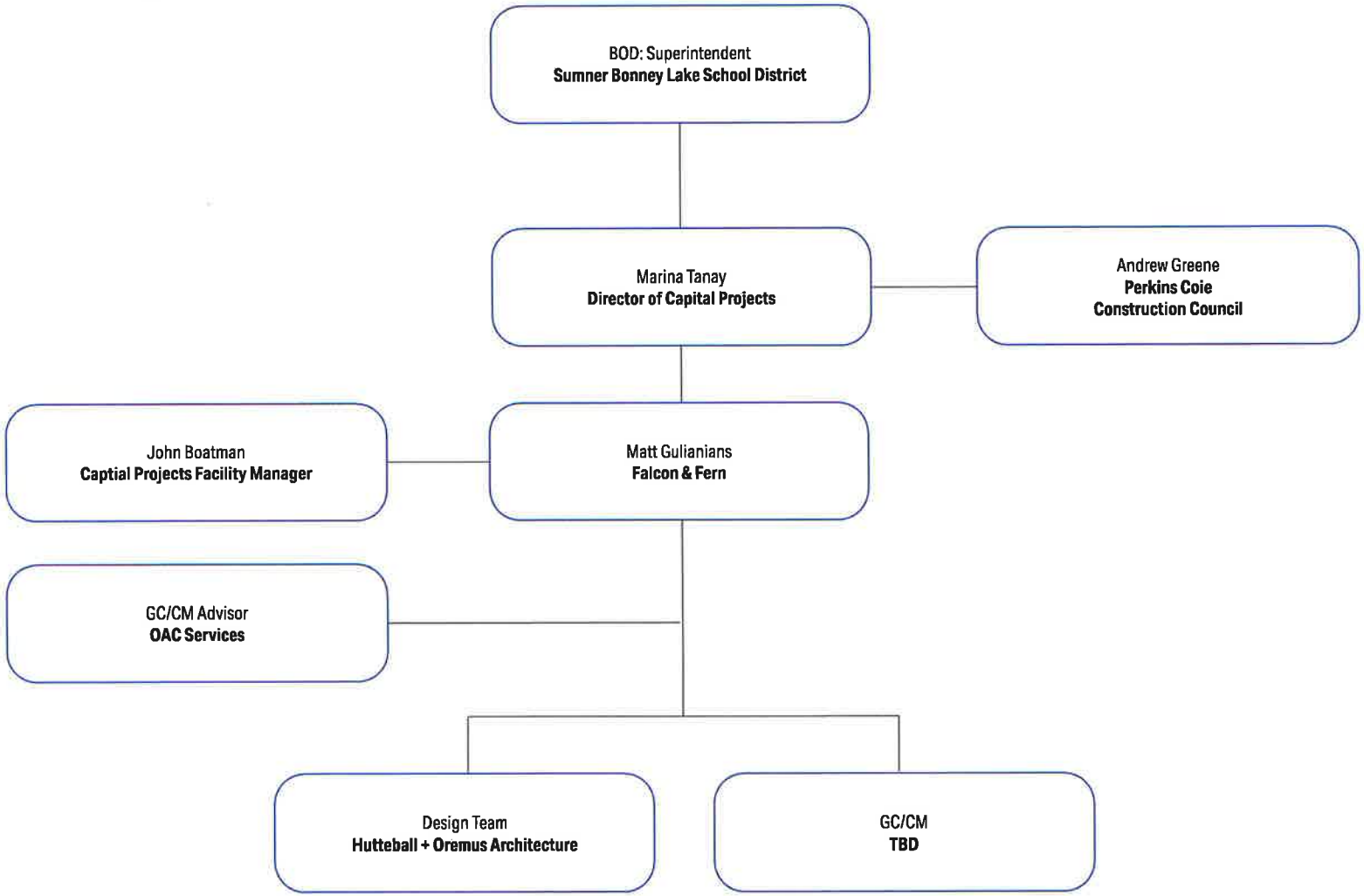
Signature: Marina Tanay

Name *(please print)*: Marina Tanay *(public body personnel)*

Title: Director of Capital Projects

Date: 8/19/25

Attachment A - Org Chart



Attachment B (Experience and Roles on Previous Projects)

Name	Affiliation/Role (Exp in section 6.3)	Projects	Construction Budget	Procurement Type	Pre-Design Role	Design Role	Construction Role
Marina Tanay	**Director of Capital Projects**						
		Tehaleh Heights Elementary	$28M	DBB	Coordinator	Coordinator	FF&E
		ELC & Sumner Middle Track & Field	$25.5M	DBB	Coordinator	Coordinator	FF&E
		BLHS PAC and TI Improvements	$14.6M	DBB	Coordinator	Coordinator	FF&E/Owner's Rep
		Emerald Hills Elementary Replacement	$29.3M	DBB	Coordinator	Coordinator	FF&E/Owner's Rep
		Lakeridge Middle School Track & Field	$3.5M	DBB	Coordinator	Coordinator	Coordinator
		Mountain View Middle Expansion/Track & Field	$17.7M	DBB	Coordinator	Owner's Rep	Owner's Rep
		Sumner High Phase 1	$74.5M	DBB	Owner's Rep	Owner's Rep	Owner's Rep
		11 portables @ BLHS and THE	$2.975M	DBB	Owner's Rep	Owner's Rep	Owner's Rep
John Boatman	**Capital Projects Facilities Manager**						
		Evergreen ES Renovation & Addition	$28.3M	GC/CM	-	-	PM
		Cedarcrest MS Replacement	$82.3M	GC/CM	-	PM	-
		New Dr. Claudia Thomas Middle School	$70.0M	GC/CM	-	-	PM
		Pierce Transit CNG Station Reconstruction	$11.3M	D-B-B	-	-	PM
		New Pioneer Middle School	$34.3M	D-B-B	-	-	PM
		Steilacoom High School Addition & Modernization	$27.7M	GC/CM	-	-	PM
		Chloe Clarke Elementary School Addition	$7.8M	D-B-B		-	PM
		Belvedere Elementary Modernization	$4.6M	D-B-B		PM	PM
		Juanita B Jones Elementary Replacement	$25.6M	D-B-B	-	PM	PM
		New Cesar Chavez Middle School	$27.6M	D-B-B	-	PM	PM
		Cajon High School Modernization	$18.7M	D-B-B	-	PM	PM
		Oak Valley Recreation Center	$21M	D-B-B	-	-	PM
		K-12 Education Park • Desert Mirage High School • Toro Canyon Middle School Las Palmitas Elementary School	$102M	Multi-Prime CM	-	PM	PIC

		Saul Martinez Elementary School	$6.5M	D-B-B	PIC	PIC	-
		Mt Vista Elementary School	$6M	D-B-B	PIC	PIC	-
		Coachella Valley High School Library	$2.1M	D-B-B	PIC	PIC	-
		Cesar Chavez Elementary (Structural Failure Mitigation)	$5.5M	D-B-B	PIC	PIC	PIC
		New D'Arcy Elementary	$3.5M	D-B-B	PM	PM	PM
		New Amelia Earhart Elementary	$3.5M	D-B-B	PM	PM	PM
		New E. Neal Roberts Elementary	$2.8M	D-B-B	PM	PM	PM
Matt Guilanians	**Program Manager**						
		Mountain View Middle Expansion/Track & Field	$17.7M	DBB	PM	PM	PM
		Sumner High Phase 1	$74.5M	DBB	PM	PM	PM
		Harvest Retail	$100M	Private	PM	PM	PM
		Keys Energy Center	$700M	Private	PM	PM	PM
		Jaguar Energy Guatemala	$500M	Private	PM	PM	PM
		City Center, Las Vegas	$12B	Private	PM	PM	PM
Jeff Jurgensen	**OAC Services, Principal In Charge**						
		Almira School District Replacement	$30M	PDB	PIC		
		Central Valley School District (6 GC/CM projects)	$180M	GC/CM	PM	PM	PM
		Washington State University Visitors Center	$2M	DB	DB Advisor	DB Advisor	DB Advisor
		Washington State University Northside Residence Hall	$33M	DB	DB Advisor	DB Advisor	DB Advisor
		Pascal Sherman Indian School	$16.5M	DB	PM	PM	PM
		City of Liberty Lake Town Square	$12M	DB	PM	PM	PM
		Nelson Service Center	$15M	DB	PM	PM	PM
		Spokane International Airport DB Parking Garage	$15M	DB	PM	PM	PM
		Central Valley School District (6 GC/CM projects)	$325 million	GC/CM & DBB	PM	PM	PM
		Bremerton SD	$100 million	PDB	PIC	PIC	PIC
		Bremerton SD	$60 million	GC/CM	PIC	PIC	PIC

		Cape Flattery SD	$139 million	PDB	PIC	PIC	PIC
		Wapato School District	$67 million	PDB	PIC	PIC	PIC
Wade Smith	**Project Executive**						
		Blue Devil Stadium and Capital Levy Projects	$16M	DBB	Proj. Exec.	Proj. Exec.	Proj. Exec.
		Walla Walla HS Reno and Addition	$80M	GCCM	Proj. Exec.	Proj. Exec.	Proj. Exec.
		Pioneer MS Reno and Addition	$30M	GCCM	Proj. Exec.	Proj. Exec.	Proj. Exec.
		Lincoln HS Reno and Addition	$20M	DBB	Proj. Exec.	Proj. Exec.	Proj. Exec.
		Berney Elem Reno Project	$4M	DBB	Proj. Exec.	Proj. Exec.	Proj. Exec.
		New District Office	$5M	DBB	Owner's Rep	Owner's Rep	Owner's Rep
		Kennison Stadium	$5M	CMGC	Proj. Exec.	Proj. Exec.	Proj. Exec.
		Armand Larive MS	$30M	CMGC	Proj. Exec.	Proj. Exec.	Proj. Exec.
		Sunset ES	$18M	CMGC	Proj. Exec.	Proj. Exec.	Proj. Exec.
		West Park ES	$18M	CMGC	Proj. Exec.	Proj. Exec.	Proj. Exec.
		Windy River ES Addition	$1M	DBB	Owner's Rep	Owner's Rep	Owner's Rep
		Heppner ES Reno and Addition	$4M	DBB	Owner	Owner	Owner
Phil Iverson	**Sr. Project Manager**						
		Cape Flattery SD K-12 Campus Relocation	2023	$142M	PDB	Sr. PM	Sr. PM
		Thurston County Courts Building 1-6 renovation	2024	$55M	PDB	Sr. PM	Sr. PM
		Western States Forensic Hospital	2024	$975M	GCCM	N/A Started at CD	Sr. PM - At CD
		Cosmopolis Elementary School Seismic Retrofit	2023	$8.2M	DBB	Sr. PM	Sr. PM
		Marysville Totem Middle School Seismic Retrofit	2023	$4.3M	DBB	Sr. PM	Sr. PM
		Inglemoor High School	2023	$84M	GC/CM	Sr. PM	Sr. PM
		Boistfort Seismic Retrofit	2021	$7M	DBB	Sr. PM	Sr. PM
		Huntington Middle School Modernization	2020	$32M	DBB	Sr. PM	Sr. PM
		Rose Valley Elementary School Addition and Mod.	2020	$12.5M	DBB	Sr. PM	Sr. PM
		Fife Elementary School	2019	$77.5M	GC/CM	Sr. PM	Sr. PM
		Lexington Elementary School	2018	$55M	GC/CM	Sr. PM	Sr. PM
		Wallace Elementary School	2018	$37M	GC/CM	Sr. PM	Sr. PM
		Surprise lake Middle School	2018	$72M	GC/CM	Sr. PM	Sr. PM

		Fife Elementary School	2019	$77.5M	GC/CM	Sr. PM	Advisor
		Carrolls Elementary School Modernization	2018	$6M	DBB	Sr. PM	Sr. PM
		Jefferson Lincoln Elementary School	2016	$59.7M	GC/CM	Owner	Owner
		Fords Prairie Elementary School	2016	$27M	GC/CM	Owner	Owner

Attachment C: Sumner Bonney Lake School District - Construction History (10 years)

Project #	*Project Name*	*Project Description*	*Contracting Method*	*Planned Start*	*Planned Finish*	*Actual Start*	*Actual Finish*	*Planned Budget*	*Actual Budget*	*Reason for Budget or schedule overrun*
	Tehaleh Heights Elementary School	New elementary	D-B-B	Sep-16	Sep-18	Sep-16	Sep-18	$ 28,000,000	$ 27,800,000	
	Early Learning Center & Symner Middle School Track & Field	New ELC on middle school campus with synthetic track and field	D-B-B	Sep-16	Sep-18	Sep-16	Sep-18	$ 25,500,000	$ 25,800,000	Land use issues stemming from neighborhood objections
	Bonney Lake HS Performing Arts Center & Tenant Improvements	New performing arts center, Grandstand seating and cover, lecture hall remodel, new stairs and security vestibule	D-B-B	Sep-18	Sep-20	Sep-17	Sep-19	$ 14,600,000	$ 14,900,000	Project was phased with the PAC and grandstand construction happening after the interior improvements.
	Emerald Hills Elementary Replacement	Replacement elementary	D-B-B	Sep-16	Sep-18	Sep-16	Jan-20	$ 29,300,000	$ 30,700,000	Additional permitting and cost due to shoreline adjacency
	Lakeridge Middle School Track & Field	New synthetic track and field	D-B-B	Sep-16	Sep-17	Sep-17	Sep-19	$ 3,500,000	$ 3,300,000	Schedule adjusted due to volume of work
	Mountain View Middle School Expansion & Track & Field	Classroom and commons expansion, new synthetic track and field	D-B-B	Sep-19	Sep-21	Jan-20	May-23	$ 17,700,000	$ 16,600,000	
	Sumner HS Phase 1	Classroom, commons, library building	D-B-B	Sep-17	Sep-21	Sep-18	Sep-23	$ 74,500,000	$ 68,100,000	
	11 Portables @ BLHS/THE	Install new and used portables	D-B-B	Jan-24	Sep-24	Jan-24	Sep-24	$ 2,975,000	$ 2,546,000	

EXHIBIT D EXISTING SITE PLAN

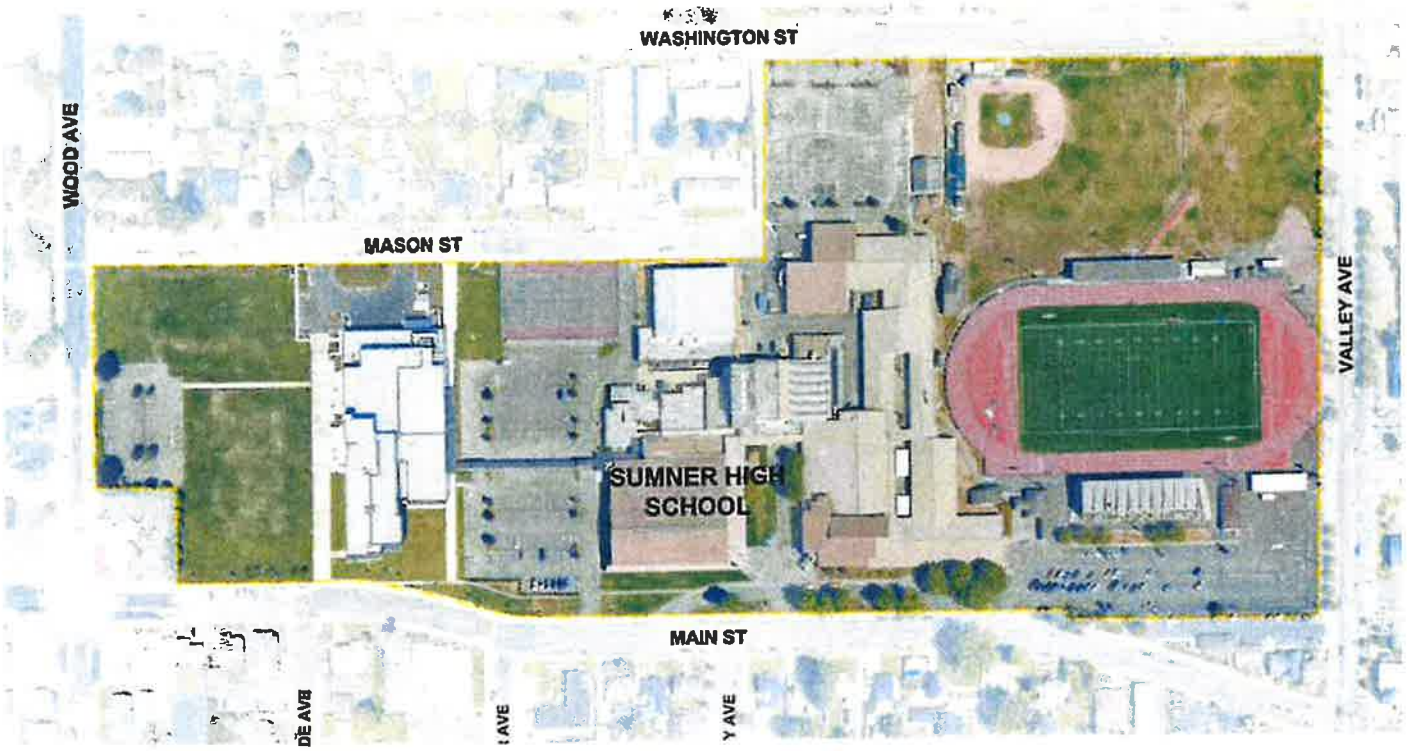
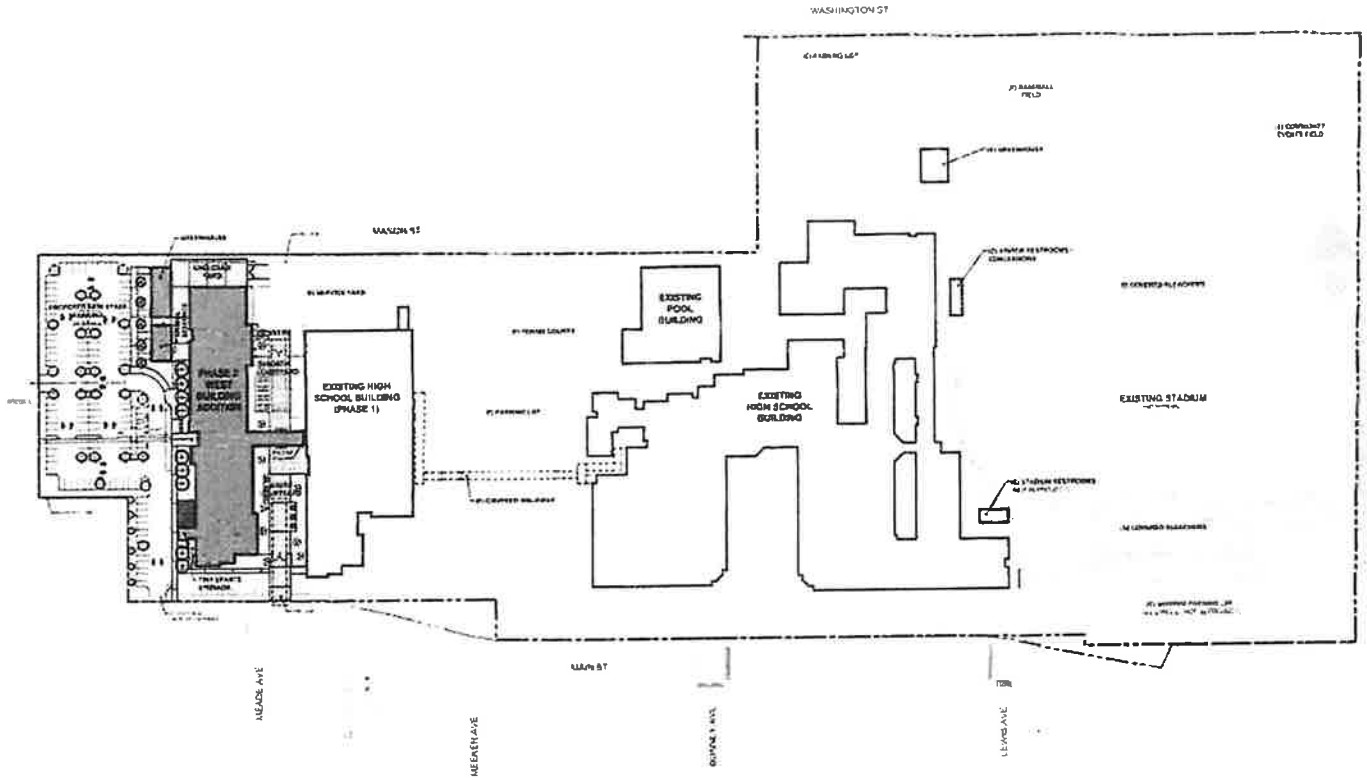


EXHIBIT D FINISHED SITE PLAN



EXTERIOR OVERVIEW NEW

VIEW FROM MAIN STREET

VIEW FROM MAIN STREET (SOUTH COURTYARD)

VIEW FROM MAIN STREET